



Microsoft Dynamics 365 for SMBs Sales Guide

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About

Sales Guide

Microsoft Dynamics 365 is a portfolio of intelligent business applications designed to help organizations work smarter, not harder. It brings together tools that improve how teams operate so they can deliver better customer experience. It's designed to simplify operations, improve agility and reduce complexity — all without increasing costs.

For SMBs, the most impactful apps in the Dynamics 365 family are:

- Business Central – for managing everything from basic accounting to full-scale operations
- Sales – for turning opportunities into revenue
- Customer Service – for delivering seamless support experiences

This guide is designed to help you position these solutions in a way that resonates with your customers. It connects their everyday challenges to practical, cloud-based solutions.

We will outline the benefits of these tools and provide tips on how you can sell these to optimize your offer and help your customers:

- Grow their business
- Increase efficiency
- Reduce risk

Guide navigation

Dynamics 365 Business Central	4
What Makes Business Central Different?	4
How Business Central Benefits My Customers.....	5
Signs Your Customers Need Business Central.....	5
Sample Questions to Take the Conversation to the Next Level	6
Dynamics 365 Sales.....	7
What Makes Dynamics 365 Sales Different?.....	7
How Dynamics 365 Sales Benefits My Customers	8
Signs Customers Need Dynamics 365 Sales	8
Sample Questions to Take the Conversation to the Next Level	9
Dynamics 365 Customer Service	10
What Makes Dynamics 365 Customer Service Different?	10
How Dynamics 365 Customer Service Benefits My Customers.....	11
Signs Customers Need Dynamics 365 Customer Service.....	11
Sample Questions to Take the Conversation to the Next Level	12

Dynamics 365 Business Central

Dynamics 365 Business Central is your all-in-one business management solution in the cloud. Whether a business is just starting out and needs reliable accounting software or scaling and need to manage finances, sales, inventory, projects and operations — Business Central grows with them.

It connects data across departments so people can truly collaborate instead of working in silos and start making smarter decisions faster. With built-in AI and automation, real-time insights and seamless collaboration tools, it helps SMBs run more efficiently and confidently.

What Makes Business Central Different?

Microsoft 365 Integration

Work seamlessly with familiar tools like Outlook, Excel, Word and Teams — keeping your data connected and your workflows efficient.

AI-Powered Tools and Agents

Leverage built-in AI capabilities to automate tasks, generate insights and assist users with everyday actions — helping teams work smarter and faster.

Cloud-Based and Accessible

Access Business Central anytime, anywhere. Ideal for remote teams and mobile workforces.

Built for Growth

Start small and scale as your business expands. Business Central adapts to your needs without requiring a full system overhaul.

Secure and Reliable

Hosted on Microsoft Azure, Business Central benefits from enterprise-grade security, compliance and guaranteed uptime.

Familiar and Intuitive Experience

Business Central features the same look and feel as other Microsoft apps, making it easy for users to navigate. With Copilot Chat built into the app, users can ask questions, get guidance and find what they need without leaving their workflow.

Integrate Business Central with Microsoft 365

Work seamlessly across tools your team already uses while keeping your business data connected in one place.

Outlook: View customer details, create quotes and invoices and track interactions directly from your inbox.

Excel: Easily open and edit Business Central data in Excel Online, then publish changes back to Business Central without manual re-entry.

Word: Customize templates for documents like invoices and letters using Word's familiar editing tools.

Teams: Collaborate on Business Central records, share files and chat with colleagues — all within Teams.

How Business Central Benefits My Customers

Improves Financial Management	Centralizes financial data and applies built-in business logic through Dataverse, simplifying cash flow tracking, budgeting and reporting. Copilot assists with tasks like bank reconciliation, saving hours of manual work.
Optimizes Operations	Integrated with Power Platform, Business Central enables real-time insights and automation across workflows.
Strengthens Customer Relationships	Unified customer data and intelligent recommendations from Copilot enable more personalized service and faster response times within familiar tools like Outlook and Teams.
Supports Smarter Decisions	Embedded analytics powered by Power BI help users spot trends, uncover opportunities and mitigate risks without needing deep technical expertise.
Boosts Productivity	With a familiar Microsoft 365-style interface and in-app Copilot Chat, users can easily navigate the system, get guidance and complete tasks faster. Built-in agents automate repetitive work, freeing up time for strategic priorities.
Reduces Costs	Automation and AI, intelligent insights and scalable architecture help businesses do more with less – reducing overhead and improving operational efficiency.
Enhances Compliance and Security	Hosted on Microsoft Azure and built on Dataverse, Business Central ensures secure data handling, audit trails and support for regulatory compliance.
Customizable and Extensible	Easily tailored to specific business needs using Power Apps and Power Automate, Business Central is also supported by a robust ecosystem of ISV solutions built to meet unique business requirements without heavy customization.

Signs Your Customers Need Business Central

- Manual processes slowing down operations
- Compliance concerns or data security gaps
- More than one disconnected system to execute on one process
- Teams spend too much time on repetitive tasks
- Limited visibility into financials or performance metrics
- Industry-specific needs not met by generic solutions
- Difficulty scaling or adapting to growth



Sample Questions to Take the Conversation to the Next Level

Finance, operations and leadership teams often face challenges that go unnoticed until they're connected to broader business goals. These questions help you start meaningful conversations with decision-makers — not just about accounting or ERP, but about how their teams work, where they struggle and what's holding them back. Use this approach to uncover opportunities where Dynamics 365 Business Central can simplify processes, improve visibility and support growth.

What do you currently use to manage your finances and reporting?

What tools are you using for tasks like invoicing, inventory and customer management? (Listen for multiple answers here and ask if Excel or Outlook are part of their workflow)

How much time does your team spend on manual tasks like data entry or reconciliation each week/month?

How many systems or reports do you need to get a full 360-degree picture of your business?

How well are your current applications integrated with Outlook, Teams or Excel?

What are your plans for growth or expansion over the next year or so?

What is your strategy around remote work?

Which employees have routine repetitive tasks in their week and what does this look like?

During your conversation, take notes on the customer's current tools, challenges and goals. These insights will help your Pax8 account team recommend the right solution and guide you through the next steps.

Dynamics 365 Sales

Dynamics 365 Sales is a cloud-based CRM solution that helps businesses build stronger customer relationships, improve sales productivity and close deals faster — powered by seamless Microsoft 365 integrations and intelligent insights.

This application can offer core sales automation with Sales Professional, including lead and opportunity tracking, account and contact management, product and price lists, quotes, orders and invoices.

For businesses that need more, Sales Enterprise adds advanced automation, AI-driven insights, forecasting and deep integration with Microsoft 365 and Power Platform.

Dynamics 365 Sales meets them where they are and grows with them as their needs evolve.

What Makes Dynamics 365 Sales Different?

Unified Platform

Centralize customer data and processes in one place to give sellers a 360-degree view of contacts, accounts and opportunities.

Don't Reinvent the Way You Work

Sales Pro and Enterprise integrate seamlessly with familiar tools like Outlook, Teams and Excel. This means sellers can manage relationships, update records and collaborate without leaving the apps they use every day.

Flexible and Scalable

Start with core CRM capabilities and grow as your business evolves. Sales Pro is ideal for SMBs, while Sales Enterprise adds advanced automation, forecasting and AI to support more complex sales processes.

Intelligent Selling with Copilot

Sales Enterprise unlocks AI-powered features like conversation intelligence, predictive scoring and Copilot in Outlook and Teams. Automate tasks, surface insights and personalize engagement at scale.

Actionable Insights and Analytics

Access real-time dashboards, forecasting tools and territory management to help sales teams focus on what matters and make smarter decisions.

Mobile Productivity

Empower sellers to stay productive on the go with mobile apps that let them view customer data, update records and manage deals from anywhere.

Connected Ecosystem

Built on Microsoft Dataverse, Dynamics 365 Sales connects effortlessly with Power BI, Power Platform, Azure and the broader Microsoft ecosystem. This enables secure data sharing, workflow automation and cross-team collaboration within a unified environment.

Integrate Dynamics 365 Sales into Microsoft 365

Work seamlessly across the tools your sales team already uses while keeping customer data connected and accessible in one place.

Outlook: Track emails, view customer details and create leads or opportunities directly from your inbox without switching apps.

Excel: Export sales data for analysis, build pivot tables and use templates to streamline reporting. (Sales Enterprise users can also integrate with Power BI for advanced analytics.)

Word: Generate and customize quotes, proposals and other sales documents using familiar Word templates.

Teams: Collaborate on sales records, share documents and get contextual guidance from Copilot (Sales Enterprise) within Teams.

Plus: Access Microsoft 365 documents, presentations and notes within Dynamics.

How Dynamics 365 Sales Benefits My Customers

Accelerates Sales	Empowers sellers with tools to manage leads, opportunities, quotes and orders — all in one place — helping them close deals faster.
Enhances Customer Relationships	Provides a unified view of customer interactions, making it easier to deliver consistent and informed service.
Boosts Productivity	Reduces manual work with automation and centralized data, allowing teams to spend more time selling and less time searching.
Increases Visibility	Offers dashboards and reporting tools that give clear insight into sales performance and customer behaviour.
Strengthens Team Collaboration	Integrates with Outlook and Teams to keep everyone aligned and working together in real time.
Delivers Seamless Customer Experiences	Supports personalized interactions by giving sellers the context they need to build trust and loyalty.

Signs Your Customers Need Dynamics 365 Sales

- Limited visibility into pipeline or customer interactions
- Inconsistent follow-ups or missed opportunities
- Reliance on spreadsheets to manage sales data
- Lack of integration with email and calendar tools
- Challenges onboarding new sales team members
- Difficulty maintaining customer relationships at scale
- Disconnected sales and customer data
- No standardized sales process
- Difficulty managing quotes and orders
- Lack of real-time reporting or dashboards
- Trouble accessing data remotely
- Limited collaboration between sales and other teams

Sample Questions to Take the Conversation to the Next Level

Sales challenges rarely exist in isolation. By engaging sales managers, directors and other leaders in open-ended discussions, you can uncover inefficiencies, missed opportunities and disconnected processes that impact the entire customer journey. These questions are designed to move beyond features and into business outcomes — helping you identify where Dynamics 365 Sales can drive real value across the organization.

What tools do your salespeople use daily to manage customer relationships?

How well do those tools integrate with email, calendars or other systems your team relies on?

How do your sales teams collaborate across departments or locations?

What does your typical sales process look like from lead to close?

How do your salespeople track and prioritize opportunities?

How do you identify and act on high-value prospects or sales opportunities?

How do you currently manage quotes, orders and customer updates?

How do you forecast revenue and track pipeline performance?

How do you elevate your team to ensure consistent performance across the board?

What insights do you wish you had about your customers or sales performance?

What would help you make faster, more informed decisions across your sales organization?

Dynamics 365 Customer Service

Dynamics 365 Customer Service provides core capabilities like case management, knowledge base access and productivity tools that help service teams resolve issues efficiently and build lasting customer relationships. It helps SMBs deliver consistent, personalized support across channels within a single, cloud-based solution.

And as service needs grow, businesses can easily expand into Customer Service Enterprise, unlocking advanced capabilities like AI-driven routing, support across multiple communication channels (like chat, email and phone) and better reporting tools to help you understand what's working and where to improve.

What Makes Dynamics 365 Customer Service Different?

Built-In Case Management with a Unified Workspace

Manage customer issues from start to resolution in a single, structured environment with timelines, related records and case history all in one place.

Streamlined Productivity with Familiar Tools

Integrates with Outlook and Excel, allowing agents to manage communications and data using tools they already know — reducing training time and improving efficiency.

Knowledge Management for Faster Resolution

Users can access and contribute to a centralized knowledge base, helping teams resolve issues faster and maintain consistency in responses.

Embedded Reporting and Dashboards

Built-in dashboards and reporting tools provide visibility into service performance, helping managers track KPIs and identify trends without needing third-party tools.

Scalable Path to Enterprise

Start with core capabilities and expand into Customer Service Enterprise when ready to unlock advanced features like AI-driven routing, omnichannel engagement (chat, voice, social) and deeper analytics.

Integrate Dynamics 365 Customer Service into Microsoft 365

Access and Update Customer Data from Anywhere

View and manage cases, contacts, documents and knowledge articles in one place, synced across devices.

Work Seamlessly with Outlook

Track emails, link them to customer cases and manage communications directly from your inbox.

Use Excel for Reporting and Updates

Open records in Excel Online and sync back to the system with no manual re-entry.

Create Personalized Communications

Generate letters, quotes, proposals and dashboards using customer data stored in Dynamics — no need to start from scratch.

Store and Share Files with SharePoint

Save and organize documents, templates and case-related files in SharePoint, directly linked to Dynamics records.

How Dynamics 365 Customer Service Benefits My Customers

Improves Customer Satisfaction	Enables fast, personalized support with case tracking and customer history.
Boosts Team Productivity	Automates routine tasks and streamlines workflows within app context.
Enhances Visibility	Provides dashboards and KPI reporting to view key metrics like case volume, resolution times and agent workload.
Simplifies Collaboration	Integrates with Microsoft Outlook to keep service teams aligned.
Tracks Cases Efficiently	Manages case status, priority and due dates to ensure timely resolution.
Supports Smarter Decisions	Offers insights through Power BI integration to help improve service operations.
Scales with Your Business	Easily expand into Customer Service Enterprise for advanced routing, multi-channel support, deeper analytics and extended integration with Microsoft 365.

Signs Customers Need Dynamics 365 Customer Service

- Inconsistent or delayed responses to customer inquiries
- Difficulty tracking case status, priority and resolution timelines
- Limited visibility into service performance and customer satisfaction
- Reliance on email or spreadsheets to manage support requests
- Lack of standardized processes for handling customer issues
- Challenges managing a growing volume of support tickets
- Difficulty sharing knowledge or documentation across service teams
- Trouble accessing customer data while working remotely
- Limited ability to personalize customer interactions
- No easy way to identify recurring issues or service trends

Sample Questions to Take the Conversation to the Next Level

Customer service challenges often reflect deeper issues across the business. By asking open-ended questions to service managers, operations directors and even sales leadership, you can uncover inefficiencies, disconnected systems and missed opportunities to improve customer experiences. These questions are designed to help shift the conversation from tools to outcomes, revealing where Dynamics 365 Customer Service can make a meaningful impact across the organization.

How do you currently manage customer inquiries and support requests?

What kind of feedback do you receive from customers about your service experience?

What are your goals for improving customer service this year?

What tools does your team use to manage support cases and collaborate?

How do you track and prioritize support requests?

Do you have visibility into recurring issues or service trends?

How do you measure the performance of your service team?

How do you ensure consistency in how different team members handle support?



Microsoft

We're Here to Support You at Every Stage

From discovery to sales, implementation and technical assistance, Pax8 works alongside you to help you guide your customers step-by-step based on their specific needs.

Not Sure Where to Start? We've Got You.

If your customers could benefit from tools that boost productivity, improve decision-making and support growth, but you're unsure how to begin or feel stretched for time or resources, reach out to your Pax8 account team.

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