

Tips and Tricks for Maximising Dynamics 365



1. LEVERAGE FLEXIBLE LICENSING

Tip: Start small with individual applications that meet immediate needs. Expand licensing as your business grows.

Trick: Use *Attach licenses* for additional applications at a lower cost - perfect for users who already hold a base license.



2. OPTIMISE DATA STORAGE AND USAGE

Tip: Consolidate your data using Dataverse, which is shared across multiple applications like Sales, Customer Service, and Commerce.

Trick: Monitor capacity usage and add capacity licences as needed to avoid disruptions. For instance, purchase additional Dataverse storage or AI Builder credits when nearing limits.



3. ENABLE AI TO WORK SMARTER

Tip: Use Microsoft Copilot to automate repetitive tasks, like generating invoices or forecasting sales.

Trick: Integrate AI- driven insights from tools like Finance Premium to make data-driven decisions and optimise operations.



4. STREAMLINE CUSTOMER INTERACTIONS

Tip: Use Unified Routing in Customer Service to intelligently allocate service requests based on agent availability and expertise.

Trick: Enhance customer support by leveraging Contact Centre features, such as intelligent Voicebots or digital messaging.



5. GO BEYOND WITH CROSS-APPLICATION FEATURES

Tip: Take advantage of shared resources like default Dataverse storage for seamless collaboration across Business Central, Commerce, and Supply Chain Management.

Trick: Implement AI Builder across multiple Dynamics 365 apps for enhanced automation, without buying separate solutions for each app.

Key Figures and Statistics

AI Builder Credits:

- 20,000 credits per tenant/month included in Dynamics 365 Finance.
- 50,000 credits per tenant/month with Finance Premium.

Transaction Capacities:

- 20,000 account protection transactions/month included in Dynamics 365 Commerce Fraud Protection.
- 2,000 Intelligent Voicebot minutes per user/month for Contact Centre Voice.

Capacity Add-Ons:

- Purchase 1,000 additional Dataverse storage units/month if your organisation exceeds included limits.
- Additional 5,000 interacted people or 100,000 unified people licences available for Customer Insights expansions.

E-Commerce Transactions:

- Tier 1 supports 4,700 monthly transactions for an Average Order Value (AOV) below \$50, scaling up to 86,000 for Tier 3.

Survey Responses:

- Customer Voice includes 2,000 responses/tenant/month, with add-ons available in 1,000-response packs.

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