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AI-First D365 Sales & Customer Service with Business Central Integration

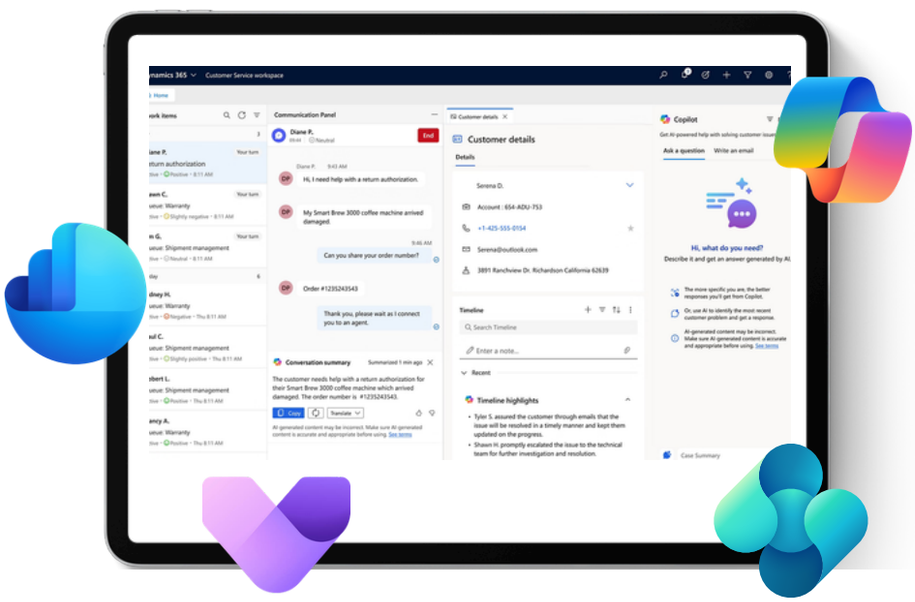
AI-First D365 Sales & Customer Service with Business Central Integration is designed for organizations looking to unify sales, service, and business operations. In 50 days, Intech delivers a connected platform powered by Dynamics 365, Business Central integration, Copilot, and Microsoft AI Agents.



50 Days **Sales + Service + Business Central Foundation** **$49,900**

Overview

AI-First D365 Sales & Customer Service with Business Central Integration is designed for organizations seeking a connected customer engagement platform across sales, service, and business operations. In 50 days, Intech delivers Dynamics 365 Sales, Dynamics 365 Customer Service, Microsoft AI Agents, and Business Central visibility to create a unified customer experience with connected operational insights.



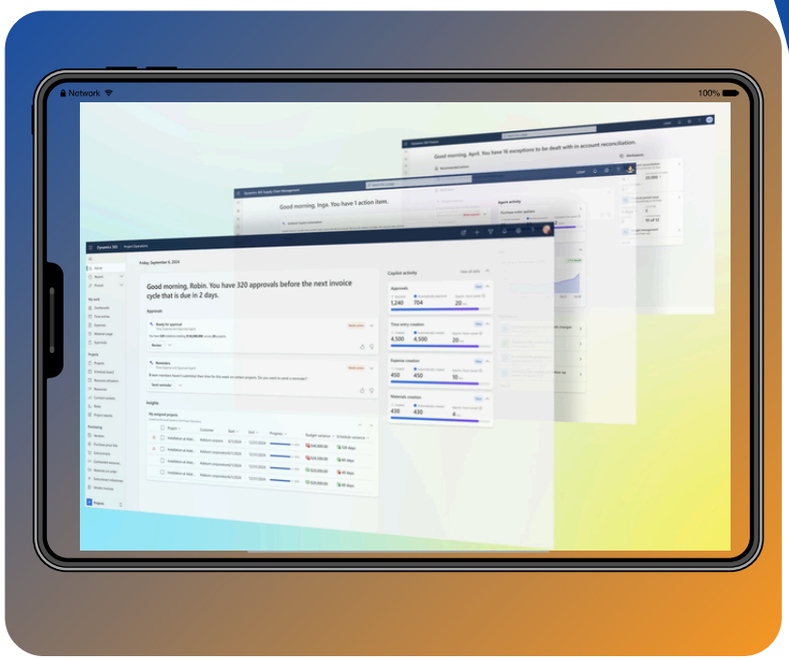
What's Included

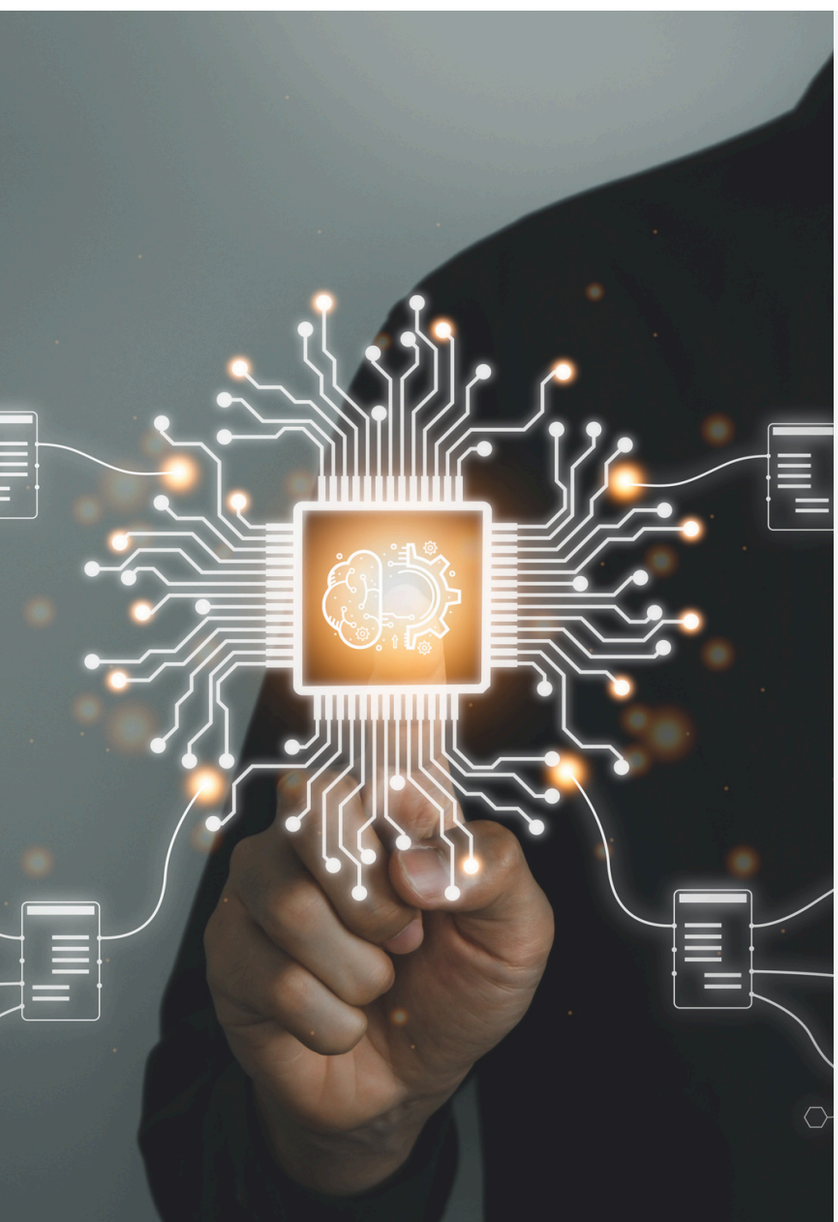
- **AI-Ready Sales Foundation:** Configure accounts, contacts, leads, opportunities, activities, products, price lists, quotes, and guided sales processes.
- **AI-Ready Customer Service Foundation:** Configure cases, queues, knowledge management, service activities, SLA tracking, and Customer Service Workspace.
- **Connected Productivity:** Enable Outlook, SharePoint, Teams, and Microsoft collaboration capabilities across sales and service teams.
- **Customer & Product Synchronization:** Connect customer, contact, product, pricing, and quote information between Dynamics 365 and Business Central.
- **Business Central Integration:** Provide visibility into orders, invoices, inventory, outstanding balances, and credit limits directly within customer-facing workflows.
- **AI Agents, Migration & User Enablement:** Enable Microsoft Sales and Service Agents where licensed, support migration, testing, training, go-live readiness, and hypercare.

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AI Working from Day One

- **Sales Agents:** Enable Sales Qualification, Sales Research, Deal Close, and Data Entry Agents to support seller productivity.
- **Service Agents:** Enable Customer Interaction, Knowledge, Service Productivity, and Case Resolution Agents to support service delivery.
- **Business Central Agents:** Enable Sales Order, Payables, and Expense Agents to streamline operational and financial processes.
- **Copilot Assistance:** Help sales, service, and operational teams access information, prepare interactions, and work more efficiently.
- **AI-Driven Productivity:** Reduce manual effort and accelerate customer-facing and back-office processes through AI-powered assistance.





Customer Benefits

- **Unified Customer Engagement:** Connect sales, service, and business operations through a single customer experience.
- **Business Central Visibility Across Customer Interactions:** Give sales and service teams access to orders, invoices, inventory, balances, and credit information without leaving Dynamics 365.
- **Cross-Functional Visibility:** Enable customer-facing and operational teams to work from the same business information.
- **Improved Productivity:** Reduce manual effort through Copilot, AI Agents, and connected workflows.
- **Better Customer Experiences:** Deliver more informed, responsive, and consistent interactions across the customer lifecycle.
- **Lower Implementation Risk:** Deploy a connected CRM and ERP foundation through a defined scope, timeline, and price.

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A Clear Path to Go-Live

50-Day Implementation | 90 Hours of Hypercare

Days 1-5

Kick-off, scope, licenses, environments, Business Central access, data readiness

Days 6-18

Dynamics Sales configuration: leads, opportunities, quotes, BPF, dashboards, agents

Days 10-25

Dynamics 365 Service configuration: cases, queues, SLA, knowledge, workspace, agents

Days 15–32

ERP integration design, mapping, sync rules, configuration and error handling

Days 25–38

Data migration, validation and correction suppor

Days 36–45

UAT, integration testing, training and go-live readiness

Days 46–50

Production deployment, go-live and hypercare start



About Intech Systems

As an AI-first Microsoft solutions partner, we help organizations unlock greater value from business applications, data, automation, Copilot, and intelligent agents. With offices in India, the United States, Canada, and Singapore, we serve a global customer base, supporting businesses of all sizes, from ambitious startups to Fortune 500 leaders and unicorns in the making.

Ready to Unify Sales, Customer Service, and Business Operations on One Microsoft Platform?

Schedule a Discovery Session

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