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AI-First D365 Sales with Business Central Integration

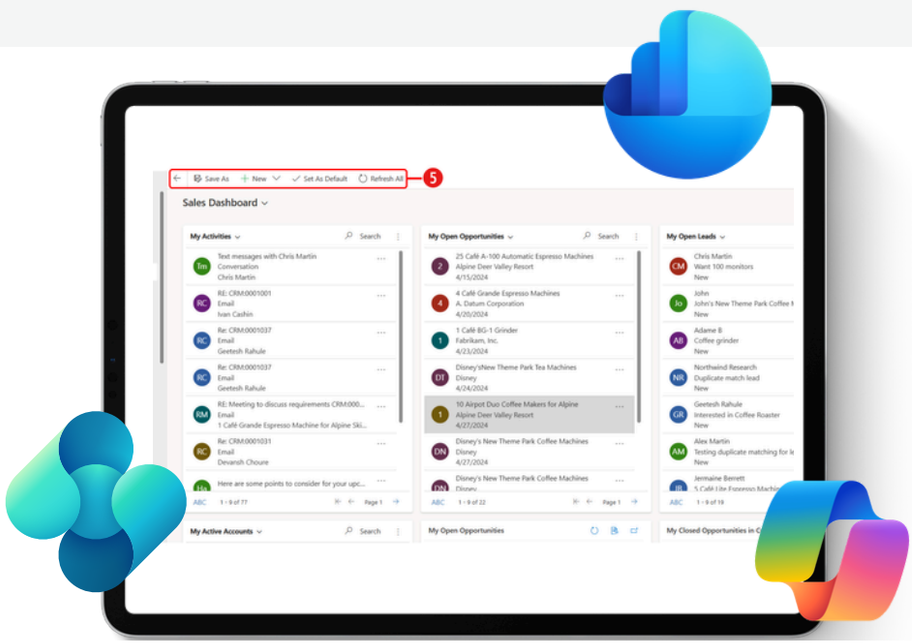
Move from disconnected sales and business systems to an AI-first connected sales platform powered by Dynamics 365 Sales and Business Central. Enable your teams with Microsoft Sales Agents while providing visibility into customer, product, inventory, order, invoice, and financial information throughout the sales cycle.



30 Days | **Sales + Busines Central Foundation** | **$25,000**

Overview

AI-First D365 Sales with Business Central Integration is designed for organizations looking to connect customer engagement with business operations. In 30 days, Intech delivers a structured sales foundation with Dynamics 365 Sales, Microsoft Sales Agents, and Business Central integration. The result is improved seller productivity, better customer conversations, and connected visibility across sales, finance, and operations.



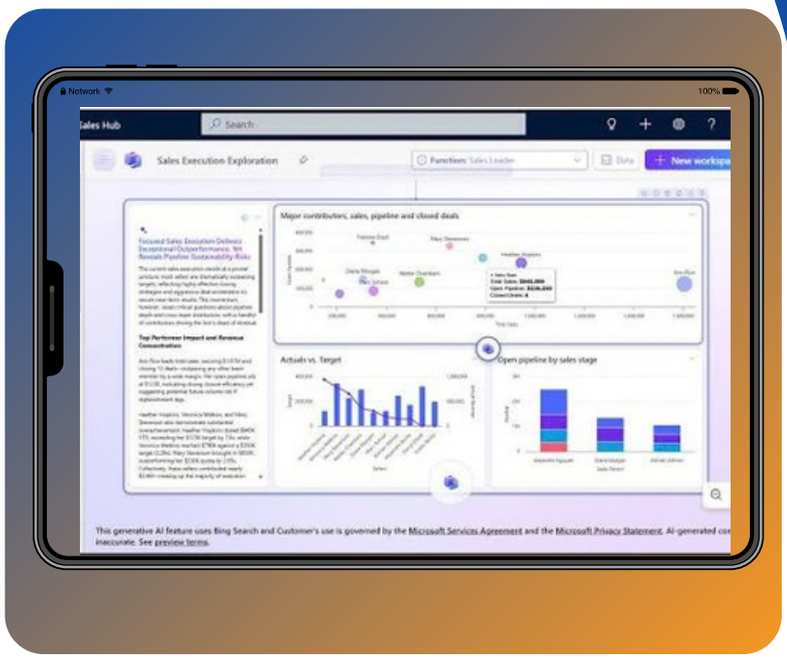
What's Included

- **Configured Sales Workspace:** Configure accounts, contacts, leads, opportunities, activities, products, price lists, and quotes.
- **Guided Sales Process:** Establish a structured Lead-to-Opportunity-to-Quote process with a standardized Business Process Flow and stage discipline.
- **Connected Productivity:** Enable Outlook and SharePoint integration for emails, meetings, documents, and customer interactions.
- **Business Central Integration & Synchronization:** Connect customer, contact, product, pricing, and quote information between Dynamics 365 Sales and Business Central.
- **Business Visibility:** Enable visibility into orders, invoices, inventory, outstanding balances, and credit limits from within Dynamics 365 Sales.
- **Sales Agents & User Enablement:** Enable Microsoft Sales Agents where licensed, support data migration, training, testing, and go-live readiness.

Microsoft Solutions Partner

AI Working from Day One

- **Sales Qualification Agent:** Help identify and prioritize the most promising opportunities.
- **Sales Research Agent:** Surface customer, account, and market insights to support seller preparation.
- **Deal Close Agent:** Support opportunity progression and customer engagement activities.
- **Data Entry Agent:** Reduce manual updates and improve CRM data quality.
- **Connected Business Context:** Give sellers access to inventory, invoices, balances, orders, and credit information directly within the sales process.





Customer Benefits

- **Connected CRM and ERP Data:** Bring customer, sales, financial, and operational information together in a single experience.
- **Business Central Visibility Within Sales:** Give sellers access to orders, invoices, inventory, outstanding balances, and credit information directly within Dynamics 365 Sales.
- **Improved Seller Productivity:** Reduce time spent switching between systems and searching for information.
- **Better Customer Conversations:** Equip sales teams with richer business context before every customer interaction.
- **More Informed Sales Decisions:** Support faster and more confident actions with connected business and customer data.
- **Lower Implementation Risk:** Adopt a connected sales and business platform through a defined scope, timeline, and price.

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A Clear Path to Go-Live

30-Day Implementation | 40 Hours of Hypercare

Days 1–3

Kick-off, users, licenses, Sales and Business Central readiness, integration access

Days 4–14

D365 Sales configuration, AI-agent readiness, Business Process Flow, security and templates

Days 10–22

Business Central integration design, mapping, configuration and initial validation

Days 18–26

Data migration, UAT, integration testing, training and issue closure

Days 27–30

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 and Business Data with Dynamics 365 and Business Central?

Schedule a Discovery Session

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