

4Start – How we integrate BC to CRM

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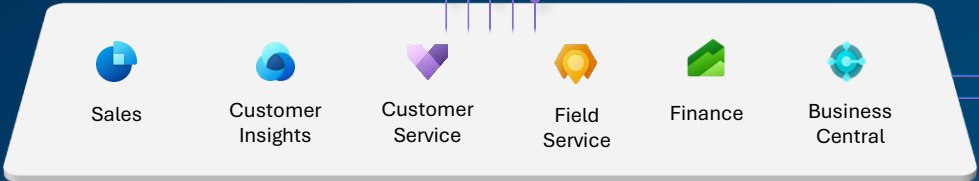


Microsoft Business Applications

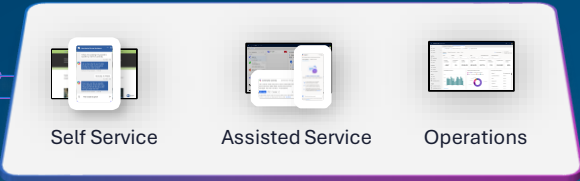
 Modern Work
UI for AI




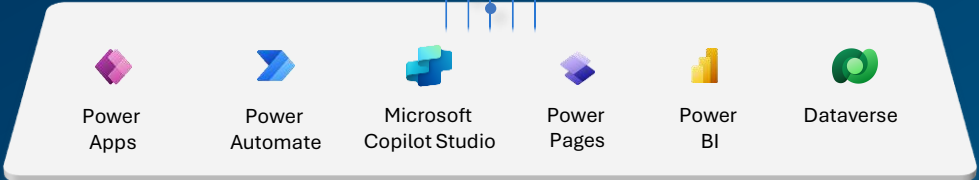
 Dynamics 365
Unified CRM & ERP




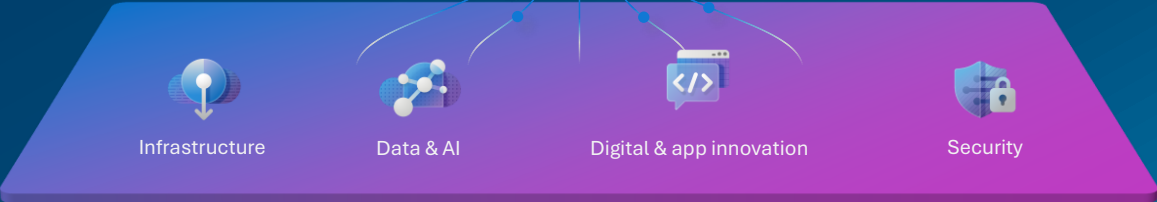
Microsoft Digital Contact Center Platform



 Power Platform
Low Code → Pro Code



 Azure
Microsoft Cloud





Business Central



Financial Management

Visibility of financial processes



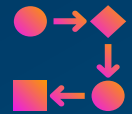
Manufacturing

Production tools for manufacturing businesses



Sales & Purchasing

Quote to cash and procure to pay cycles



Service Management

Improve operational efficiency



Inventory Management

Right product, right time



Basic Customer Engagement

Basic relationship and activity logging



Job Management

Monitor utilisation



Prepare for the AI future

Agentic tool enriched



Dynamics 365 Sales



Purpose built for sales productivity

No switching between systems for sales & finance insights



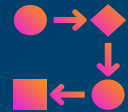
Centralised Customer Interaction Timeline

Combine pipeline data with BC finance data



Lead/Opportunity Tracking & Pipeline Mgmt.

Eliminate miscommunication



Sales Processes/Automation Support

Automated synchronisation of accounts contacts and more.



Forecasting & Sales Intelligence

Seamless flow from lead to invoice



Enhanced Customer Engagement

Build better data backed relationships.



Track emails, schedule follow ups & work in Teams

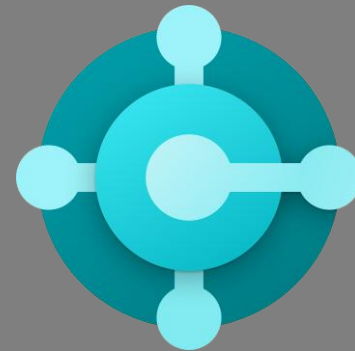
Avoid switching between apps

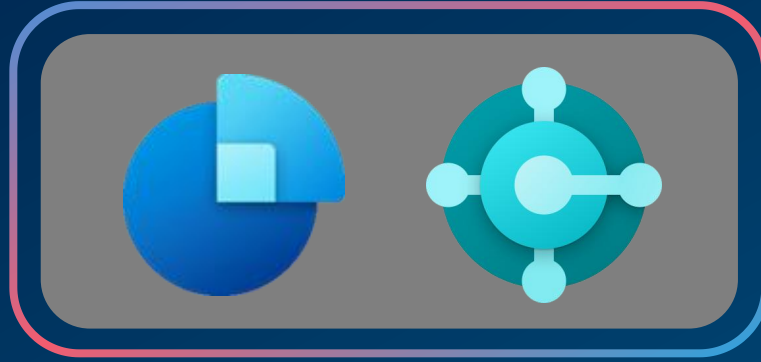


Prepare for the AI future

AI enriched tools

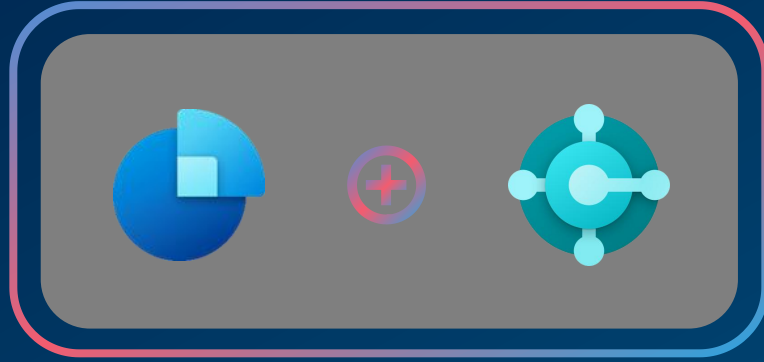
Two **Powerful** Business Applications





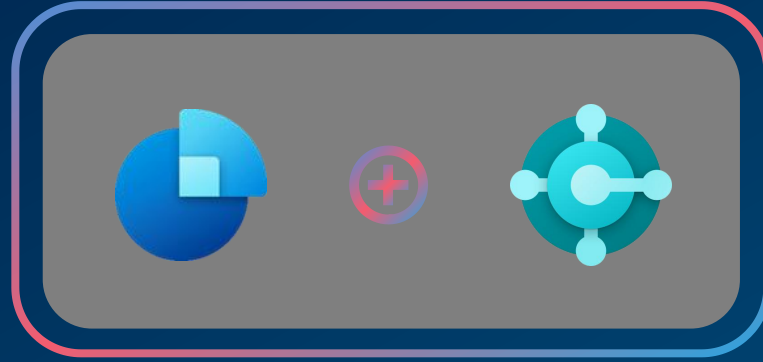
The Challenge...

- Disconnected Systems
- Siloed Teams
- Duplicated Effort
- Data Visibility

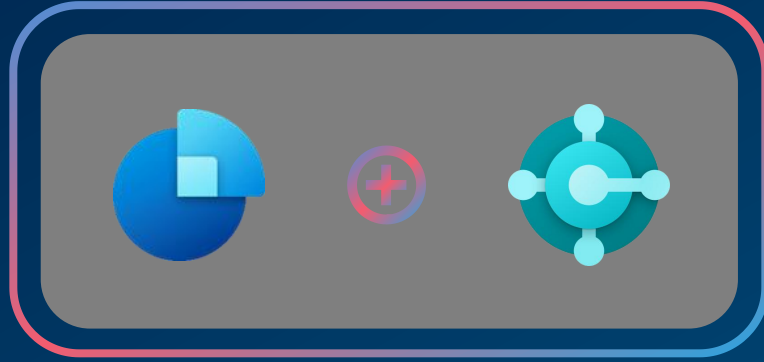


Powerful Alone

What About Connected?

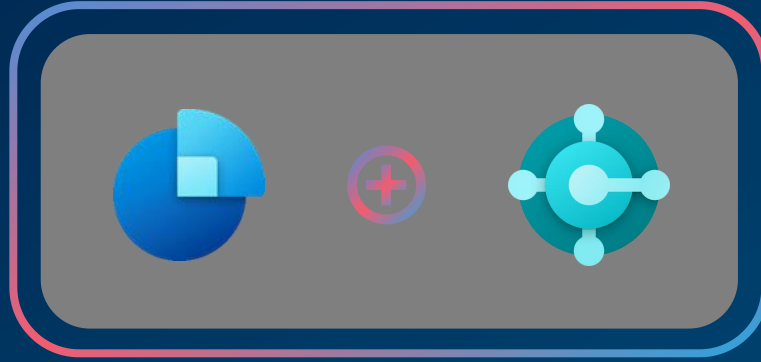


Single Source of Truth
End-to-End Customer Journey
Visibility



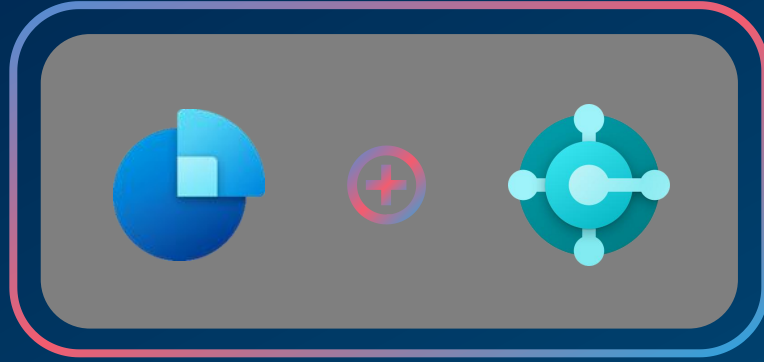
Faster Quote-to-Cash

Empowered Sales Teams



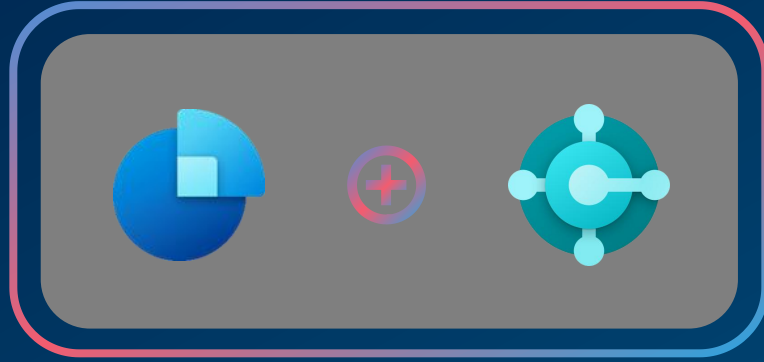
Improved Forecasting & Decision Making

Enhanced Collaboration



Scalable Growth

AI Driven



The Impact?

Organisational Benefits



Connect Your Systems

No switching between systems for sales & finance insights



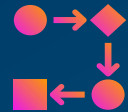
Improved Decision Making

Combine pipeline data with BC finance data



Stronger Sales & Finance Alignment

Eliminate miscommunication



Boosted Productivity & Efficiency

Automated synchronisation of accounts contacts and more.



Faster Quote To Cash

Seamless flow from lead to invoice



Enhanced Customer Engagement

Build better data backed relationships.



Foundation For Growth

Standardise processes that scale with the business



Prepare for the AI future

AI enriched tools

Seamlessly Integrated



Dataverse



Accounts



Contacts



Products

CRM DATA



Integration & Sync



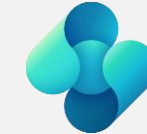
Integration Table Mapping



Coupling Records



Sync Engine & Job Queue



Business
Central



Customers



Items



Sales Orders

ERP DATA

Demo

Typical D365 Sales to BC Sales
Process



4Start

**The effective way
to achieve business
transformation**

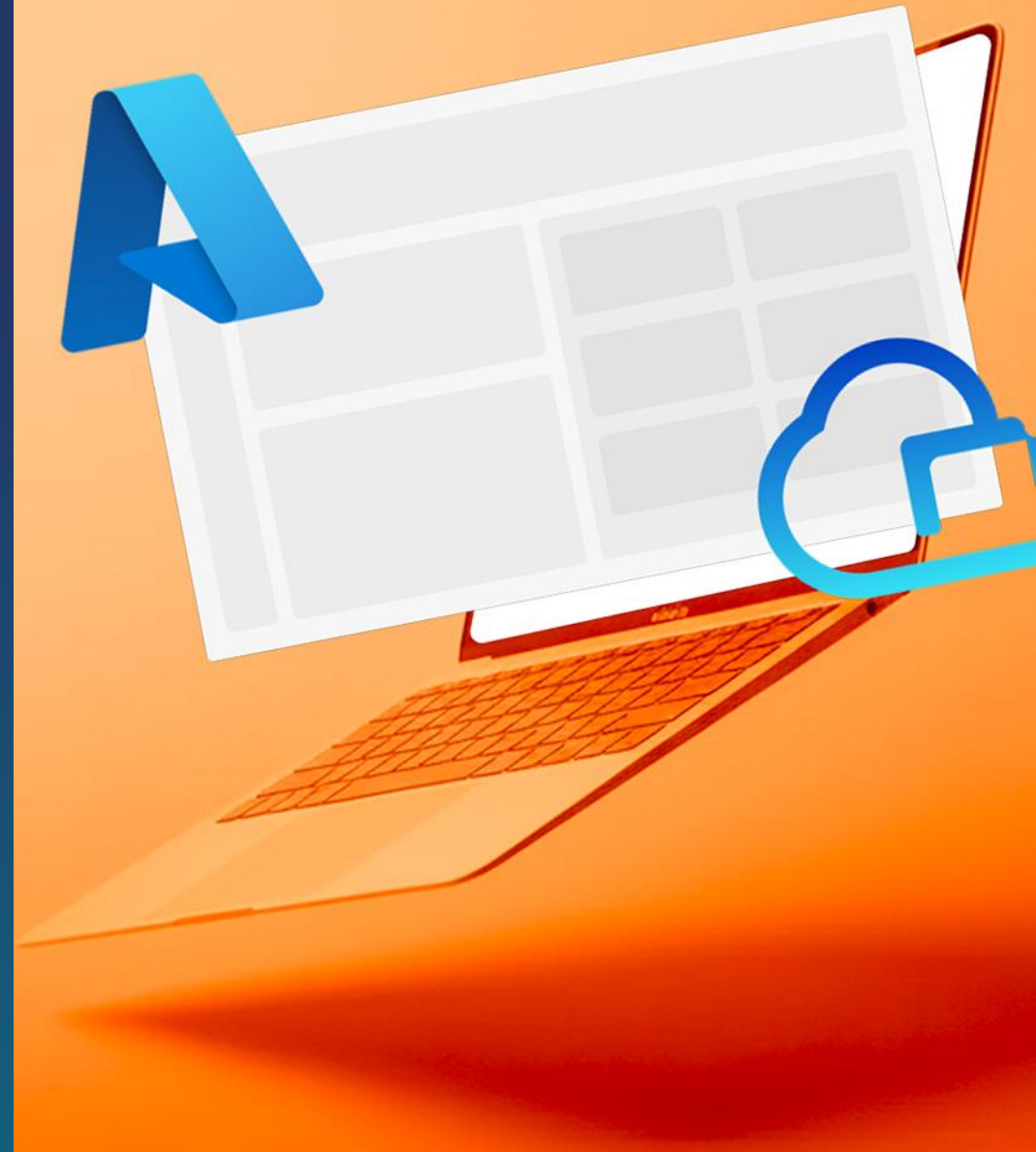
- Rapid fixed-scope deployment
- Streamlined Quote-to-Cash process
- Immediate value with predictable costs
- Ideal for SMBs & Growth Teams

4Start Features

- Comprehensive Sales Management
- Scalability & Growth
- AI-Powered Insights
- Enhanced Reporting

Case Study

Cottam Brush Ltd specialise in industrial and technical brush solutions. The company has a heritage dating back to 1858, making it one of the oldest brushmakers in the UK.





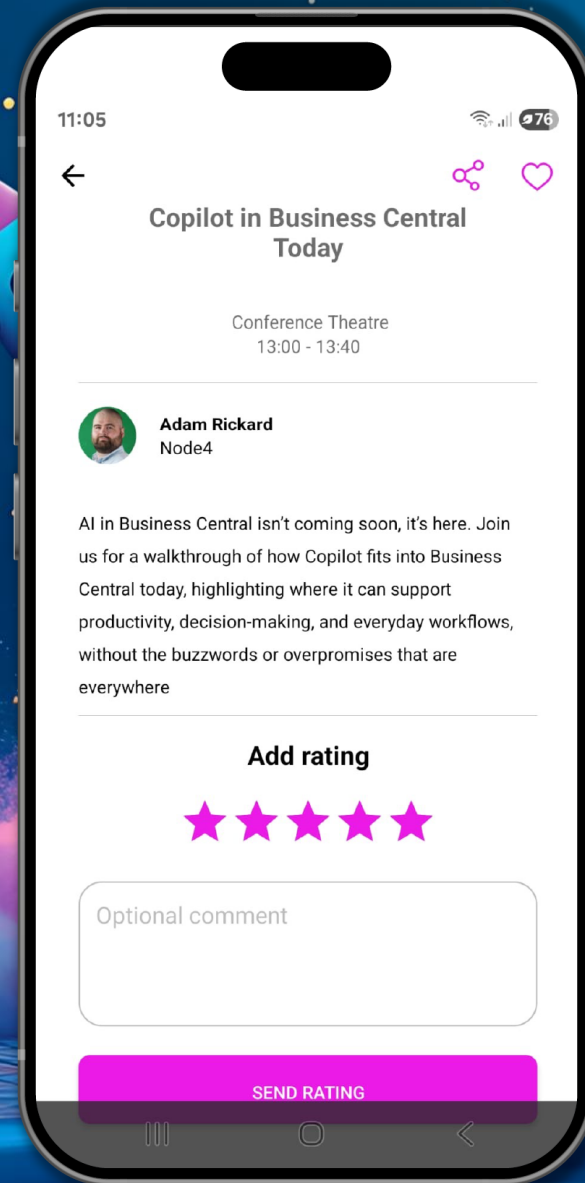
You guys are a dream to work with, and we are so excited to have you on this project. Working with you guys, it's going to be a real game-changer for us. Roll on phase 2

State Manager / Manager / Michael Kelly



Loved it? Learned something? Had opinions?

Head to the app and share your thoughts - stars and honesty encouraged



Thank You.

