

GUIDE

Maximise the value of Dynamics 365 and Power Platform with ANS Managed Services.



ANS

Think Bigger.



We are one of the most highly certified partners in the UK.

ANS is one of an elite group of partners to attain all 6 Microsoft Solutions partner designations.



Business Applications



Security



Modern Work



Digital & App Innovation
Azure



Data & AI
Azure



Infrastructure
Azure

Over
1000
Vendor
certifications.

24/7/365
support and SOC

Over **25 years**
experience

Award winning work.

We are highly recognised for our work, receiving multiple awards for our top performing solutions.



Microsoft 'Inner Circle' Award Winner

ANS is now a recipient of Microsoft's Inner Circle Award for the 8th year in a row. ANS is now a recipient of Microsoft's Inner Circle Award for the 8th year in a row. This achievement is awarded to top-performing partners who have accelerated digital transformations for customers through Microsoft solutions like Dynamics 365 and Power Platform.



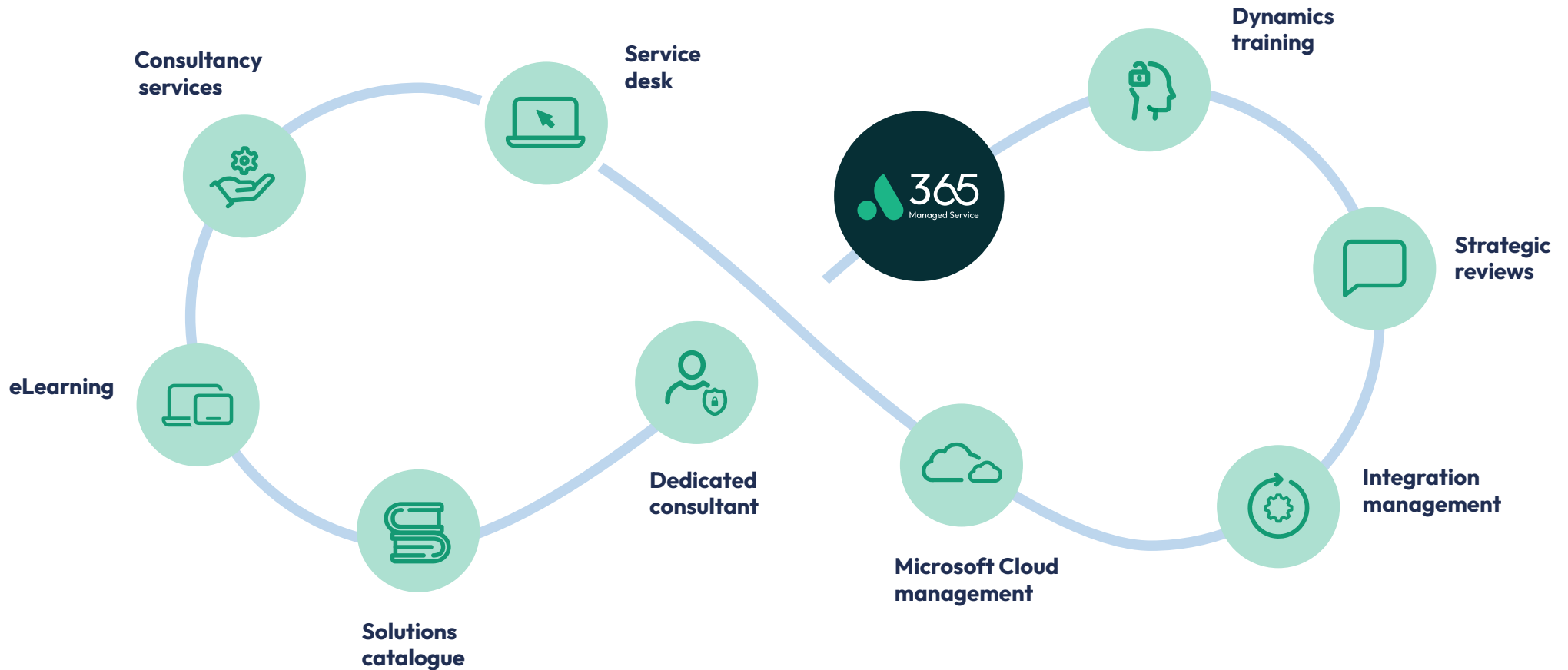
Microsoft UK Services Partner of the Year 2024

We're Microsoft UK Services Partner of the Year 2024! After years of delivering innovative solutions to empower our customers, ANS is proud to be Microsoft's UK Services Partner of the Year for 2024.

Managed Services at a glance.

ANS Managed Services for Dynamics 365 is more than just CRM support. Gain access to unparalleled expertise and resources, helping you to drive continuous performance enhancements with Dynamics and the Microsoft Cloud Platform.

Phase your CRM rollout or gain increased value from an existing Dynamics deployment with access to:



Where are you with Dynamics 365?

- ? Have you recently **implemented Dynamics** and need help resolving issues?
- ? Are you looking to **simplify or automate** more processes?
- ? Is your in-house CRM admin feeling **overwhelmed** as a single point of contact?
- ? Do you **lack support** to help plan updates to your Dynamics system?
- ? Are you encountering user adoption **barriers**?
- ? Do you have a **backlog** of change requests but lack the **capacity** to implement them?
- ? Need assistance **configuring** new CRM features?
- ? Could you gain better **insights** from your data?
- ? Do you need help **understanding** how AI features can be effectively used?

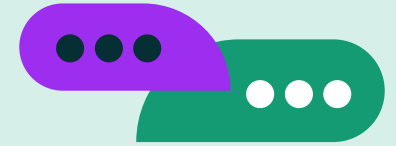
It's time to get
expert help
from one of the
best Microsoft
partners in
the world!

If you are experiencing one or more of these issues, we will help you increase the value of your Dynamics 365 or Power Platform investment with our industry-leading support services.

As recognised by Microsoft - winner of 7 consecutive Inner Circle awards for Business Applications (Top 1% of Business Applications partners globally).



Expertly addressing frequently asked questions and requirements.



What can we do to

Optimise our cloud storage?

Support

Consultancy

How do we

Change something in our system?

Support

Consultancy

How can we

Learn how to build Power Automate flows?

Training

How can we

Make our system easier for our team?

Consultancy

Solutions

How can we

Deploy Dynamics 365 Marketing?

Training

Consultancy

eLearning

We need help

Updating our security roles.

Support

Consultancy

How can we

Develop a low-code app to handle a new workload?

Consultancy

How can we

Configure a new feature in Dynamics?

Support

Consultancy

We want to

Integrate DocuSign and other third-party services.

Consultancy

Solutions

We need to

Train additional Dynamics users.

Training

eLearning

We need to

We need to create a new Power BI report

Training

Consultancy

We need help

Resolving an issue with Dynamics 365.

Support

Launch Consultancy.

Our Managed Services include a one-off allocation of hours to support the rapid deployment of a Dynamics 365 app or to onboard an existing environment.

Launch Dynamics

Our team will help you go live quickly by providing hands-on assistance to configure and personalise your Dynamics app.



Onboard Dynamics

If you are already using Dynamics, our technicians will assess your environment and get to work on your immediate priorities.



What's included.

Choose the service level that best suits your needs to access the knowledge, skills and resources to help you evolve your Dynamics 365 environment.

Features	Base	Elevate 365	Centre of Excellence
Launch consultancy	✓	✓	✓
Service desk	✓	✓	✓
Online portal access	✓	✓	✓
eLearning access	✓	✓	✓
Solutions catalogue access	✓	✓	✓
Inclusive consultancy hours		✓	✓
Microsoft Business Apps expert access		✓	✓
Update/upgrade management		✓	✓
Performance tuning and diagnostics		✓	✓
Integration management		✓	✓
Power Platform management		✓	✓
Change management		✓	✓
Service review reporting		✓	✓
Customer success manager		✓	✓
Backlog management and implementation			✓
Dedicated application consultant			✓
Strategic and technical reviews			✓
Update insights			✓
User adoption insights			✓

Centre of Excellence.

A Centre of Excellence [CoE] is a centralised unit of dedicated engineers who streamline access to scarce, high-demand capabilities for rapid execution across the business.

By choosing our Centre of Excellence managed service, you can tap into a rich pool of skills and resources as and when you need them without the burden of building your in-house capability.

The ANS CoE hones expertise across Dynamic 365 CRM apps and the Microsoft low-code platform to standardise best practices for wide-scale adoption.

How our Centre of Excellence customers benefit

- Access in-demand skills, on demand
- Implement changes rapidly
- Gain access to bespoke solutions
- Get up and running faster
- Proactive advice and insights



Examples of activities scheduled by organisations using ANS 365 Managed Service to improve and extend their Dynamics 365 system.



Training

- Dynamics 365 Marketing training
- Bespoke Dynamics training
- Admin training

Power BI

- Report customisations
- Create Power BI charts
- Power BI training

Upgrade Readiness

- Upgrade workshop
- Configure new features
- Transition from legacy features

System Integration

- Integration workshop
- Hubspot integration
- Payment gateway integration

Portal Deployment

- Custom portal development
- Portal customisations
- Design workshop

Power Apps

- Low-code development
- App customisation
- Developing model-driven apps

Power Automate

- Power Automate training
- Update automation flows
- Create new flows

Marketing automation

- User onboarding
- Campaign automation help
- Consent management

Dynamics Consultancy

- Data import
- Form customisation
- Cloud storage review

Engagement activity

- Backlog planning and updates
- Sprint planning
- Service review

Deploy Apps & Solutions

- Configure Customer Insights Journeys
- Deploy packaged solutions
- Launch D365 Sales

Artificial Intelligence

- Launch AI apps
- Chatbot development
- AI discovery workshop

Our supported products include...



Microsoft
Dynamics 365



Dynamics 365
Sales



Dynamics 365
Customer Service



Dynamics 365
Field Service



Dynamics 365
Marketing



ClickDimensions



Power Platform



Power Automate



Power Apps



Power BI



Power Pages



Power Virtual Agents



Dynamics eLearning.

Use our eLearning academy to quickly onboard new users and increase Dynamics 365 knowledge across your team.

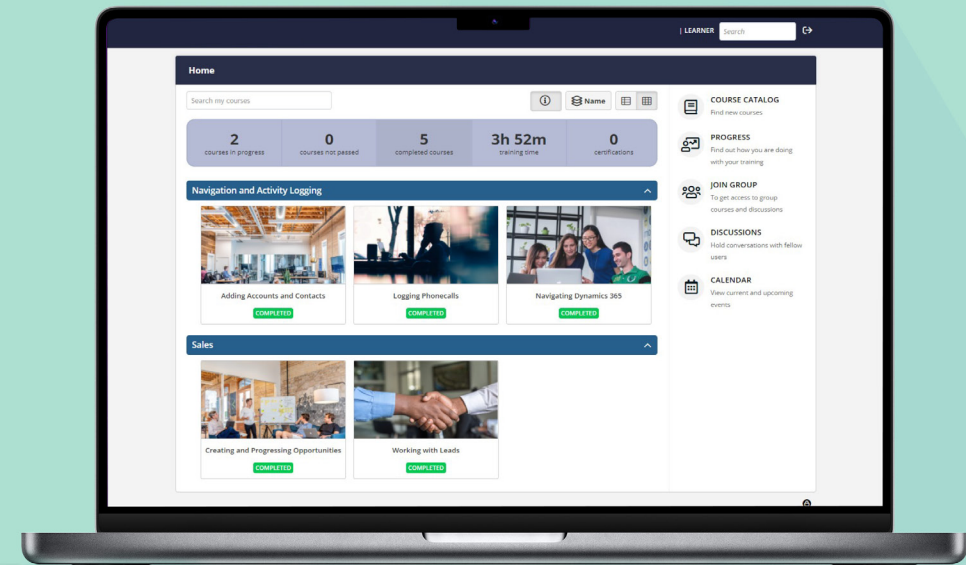
- Use training modules to increase Dynamics expertise and fill knowledge gaps.
- Work through sessions led by our Microsoft-accredited trainers.
- Practice in our safe training environment using on-screen prompts.
- Access dozens of feature and role-based eLearning modules.



User training modules.

ELearning modules for new users across Dynamics 365 CRM apps, including:

- ✓ Navigating Dynamics 365
- ✓ Adding accounts & contacts
- ✓ Logging phone calls
- ✓ Creating advanced filters
- ✓ Working with leads & service cases
- ✓ Creating marketing emails, segments and customer journeys
- ✓ Introduction to Power Automate



Solutions Catalogue.

Our team simplifies processes and bridges functionality gaps, enhancing experiences for Dynamics 365 users.

Frequent requirements inspire us to develop repeatable solutions, added to our Solutions Catalogue for easy sharing. ANS Managed Services customers gain access to our packaged products, including specialist apps, connectors and automated solutions, at no extra cost.

Streamline your operations and unlock the full potential of Dynamics 365 with our solutions, including:



Charity Hub

ANS implement and support flexible, simple-to-use CRM that helps non-profits and charities drive digital transformation and increase social impact.



Course Manager

With our customisable Dynamics 365 solution for training providers, managing your courses and bookings has never been easier.



Asset Management

Application that will provide a hierarchical structure that can be used to capture assets at varying levels/locations.



Xero Connector

Effortlessly sync your financial data between Dynamics 365 and Xero with our seamless connector.



Bookings

Solutions that includes a booking engine allowing bookings of book desks, car park spaces, rooms or people.



Creditsafe Connector

The Creditsafe Connector enables you to conduct credit checks on your customers and suppliers from your app, saving time and minimising risk.



Timesheets

Lightweight timesheets solution to log time against a project task.



MailChimp Connector

Mailchimp Connector is an easy to use solution build on Power Platform, that connects with Mailchimp and provides a simpler and cost saving alternative to an e-marketing platform.

Solutions Catalogue.



Record Tagging

Use our form control to quickly tag accounts, contacts, leads and any standard or custom entity, and apply tag filters to categorise, search and filter your records.



Maintenance Management

The Maintenance Management is a lightweight Job Management application, a slimmed down version of Dynamics 365 Field Service.



Ideas Hub

Utilising the Ideas Hub as a starting point, users will be able to understand the entire lifecycle of a solution, from its initial inception, through its build and usage.



Incident Management

Lightweight Case/Ticket Management solution allowing organisations to track inbound enquiries and assign them to a user or team to action.



Expenses

Easy to use and intuitive Expenses Application allowing users to manage their claims and expenses, as well as providing a simple interface for the approvers to manage the claims approval process.



Forms Manager

Configurable questionnaire framework, that can be used to construct basic Q&A type questionnaires.



Grant Hub

Whether it's grant-seeking or managing funding programs, our solution will simplify your workflows, so you can efficiently provide vital support to those who need it most.



Event Management

Manage events and track attendees, tickets, event bookings, sponsors without the additional overhead of the Dynamics marketing platform.

What our customers say.

“The training and support we’ve received has enabled us to get CRM to a much better place. I feel I’m always learning, and it’s exciting to discover new things which I can share with the rest of the team. The team has done a phenomenal job for us, and they continue to look after us very well. I can’t fault them!”

- Joanne Court, CRM Administrator, Dart Valley Systems

“When Dynamics problems have come to light, I’ve found ANS (now part of ANS) refreshingly honest in their communications with us. Their team has gone the extra mile to fix issues, and I’d happily recommend them to anyone that wants to get more out of Dynamics 365.”

- Darren Oliver, Technical Director, BeBa Energy UK

“We’ve gained immense value from our relationship with ANS (now part of ANS). They’ve invested time to get to know our business, what we do and how we work. I have complete faith in their knowledge, and I’ve never previously felt so secure with an IT provider.”

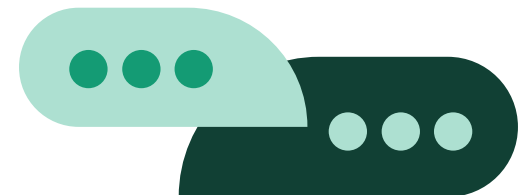
- Karen Mendoza, Head of CRM, Burgess Yachts

“We’ve received excellent support through account management, technical help and consultancy. A key part of this has been the continuity in speaking to people who understand our business and how we use Dynamics.”

- Alan Hyde, Operations Director, DDC Dolphin

“Since we upgraded, it’s easier to get changes done, and these are mostly handled through ANS (now part of ANS). Their managed service has been easy to use, and their team have been responsive whenever we’ve needed advice.”

- Dan Young, Head of IT & Support, Killik & Co



We are proud to work with...



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