



The Power of Dynamics 365 Ecosystem

- Dynamics 365 Ecosystem / Power Platform
- **Key Components**
 - Power BI – Reporting and Intelligence
 - Power Apps – Customizable applications for your operations
 - Power Automate – Instant or Automated scripting between systems
 - PopDock - "Smartlist for the web"
 - Your ERP system (GP or BC)
 - Copilot* (coming Q3 2023)

Why Power Platform

- You probably already own some of this with your Office365 Subscription
- Allows you to customize web apps and your CRM
- All cloud based – access it anywhere, including your mobile device
- Built for interoperability, the tools work together
 - Can embed Power BI in Power Apps, call Power Automate from Power BI, etc
- All can be embedded into Teams, Outlook, CRM, Business Central
- You may already own Popdock

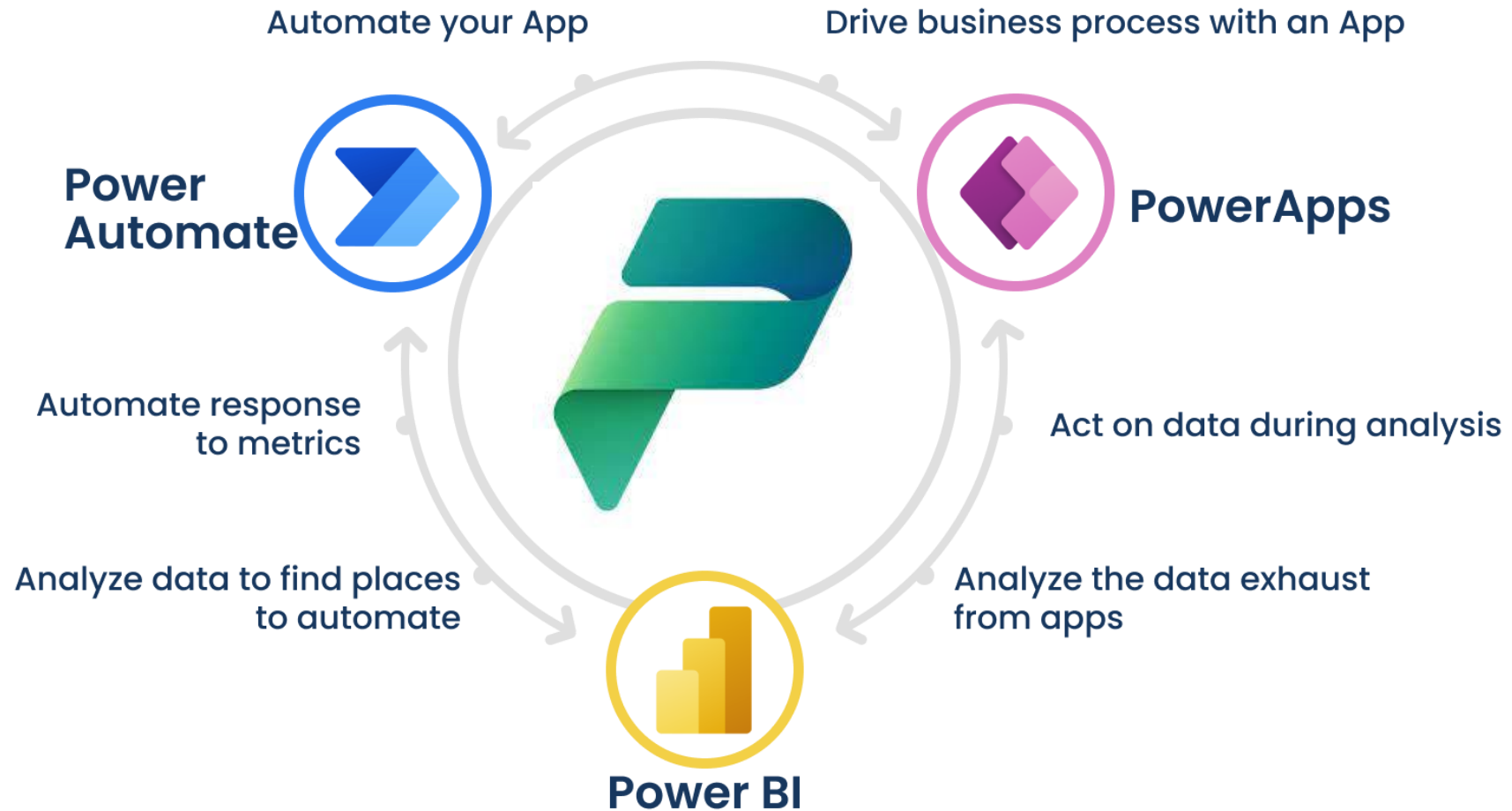
But I'm still running On-Premise GP...

- GP can interact with Power Platform via a secure connection, and act as a trigger and share data the same as Business Central
- Can trigger actions on Create/Update/Delete of records in GP
- Can be simple (Popdock) or advanced (Power Automate)
- Present your GP data in cloud applications like CRM, or have quick access to GP data in Teams
- You can interact with GP data, including updates back to your ERP system with controls and security in place

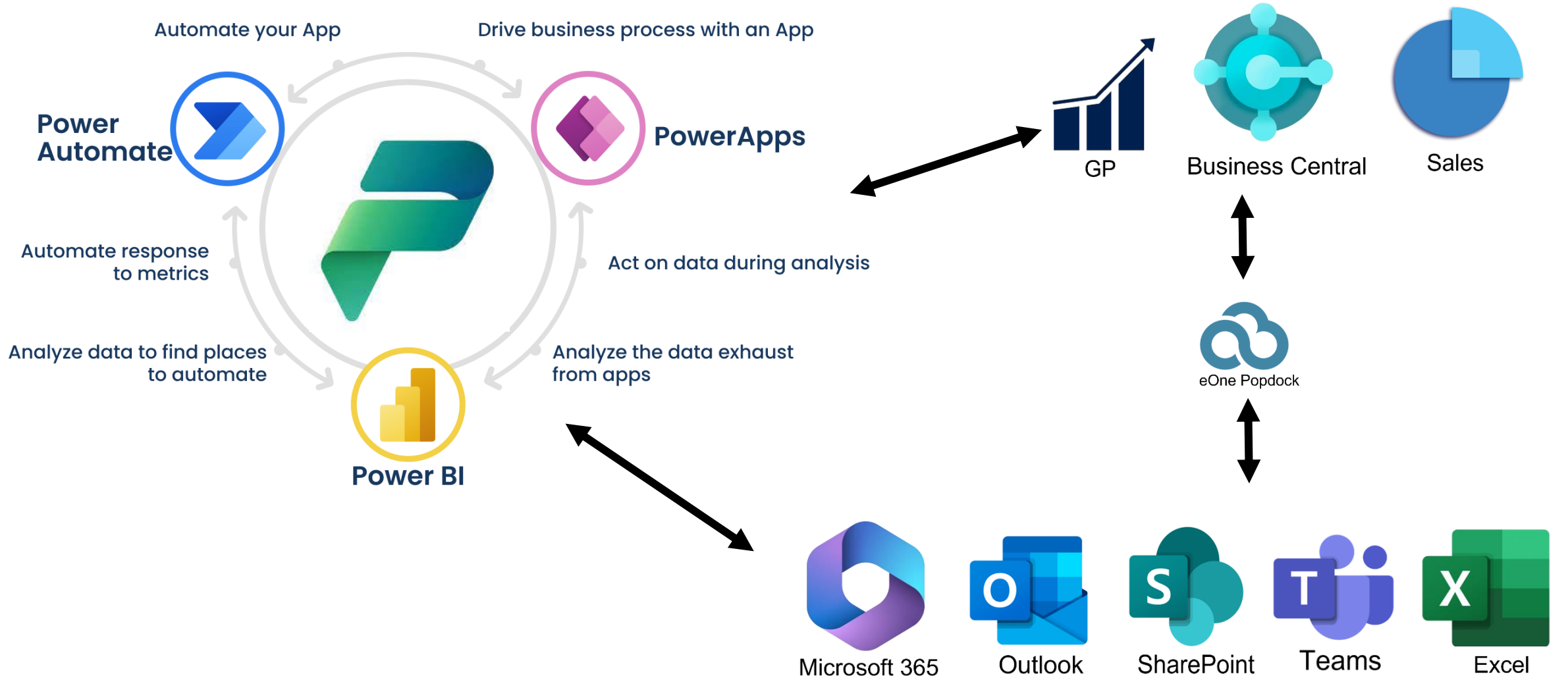
Bring your on-premise to the cloud

- Through secure connectors, your on-premise servers can share data with cloud applications
- Through Power Automate, this allows GP to interact with over 100 cloud based business applications
- Take advantage of cloud based solutions while still having time to plan the eventual move to cloud ERP

Power Platform Components

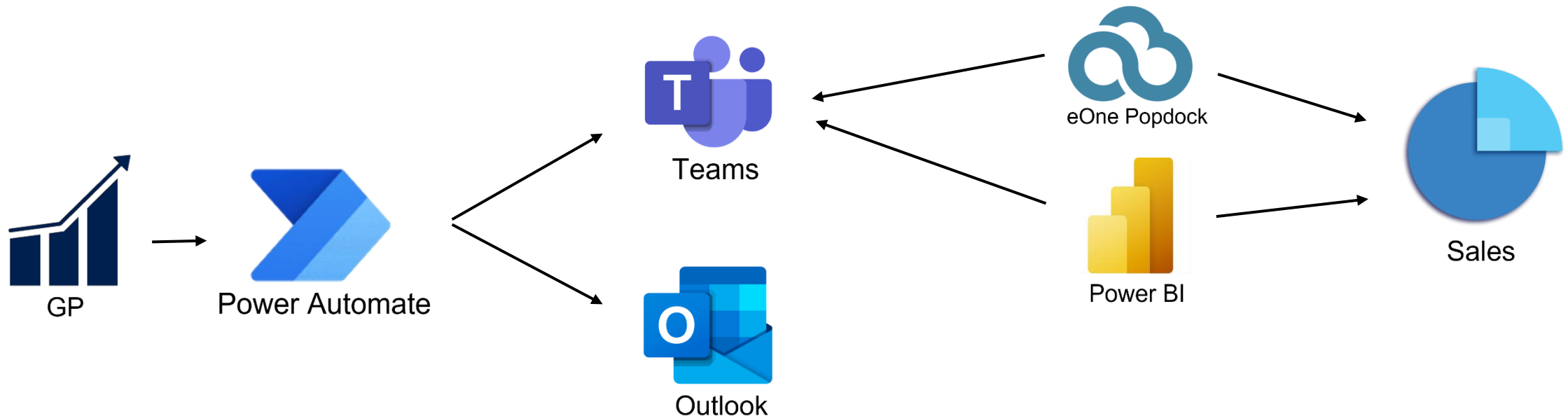


Power Platform Integration



In the Real World (tm)

Scenario: Your finance team has just entered an invoice to a customer which puts them near their credit limit, and may interrupt other pending orders. Your salesperson needs to take action to get the balance down or the credit limit up before the next order goes through. How can we make this as proactive and seamless as possible?



What did I just see there?

- **GP** told **Power Automate** to take an action, sending an email with a link to Sales (CRM)
- **Power Automate** responded to the salesperson's action, with either a simple email or to a Power App (customization in CRM) to handle the issue
- **Popdock** provided the backup information to assist the salesperson (no finance intervention necessary!)
- **PowerBI** allowed the salesperson to be proactive for other customers, rather than reacting when it happens again

That's a lot of different components...

- Because these tools work together, you can work where you like:



Outlook – automation, Sales Sidebar, links



Teams – Bring the tools into one interface, and provide chat/meeting interface to facilitate team collaboration

- Popdock acts in the background to put the data where you need it
- Work with the tools you already love

But I'm already going to the cloud

- Changing the trigger (GP to BC for example) still activates the workflow. The rest stays the same for your operational users
- Popdock helps your transition to BC by providing easy, controlled, read-only access to historical information in BC, Sales, and Teams
- You can keep the old GP server, or migrate your data to the cloud for quick and easy retrieval. No need to migrate historical data
- Empower your coworkers with better processes and information while keeping them out of your ERP system
- Fewer ERP licenses = \$\$\$ saved

And coming later this year... Microsoft 365 Copilot



Questions....?

