Dynamics **Hive**

Simple, Powerful CRM
Built for Growing Businesses

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What is Dynamics Hive?

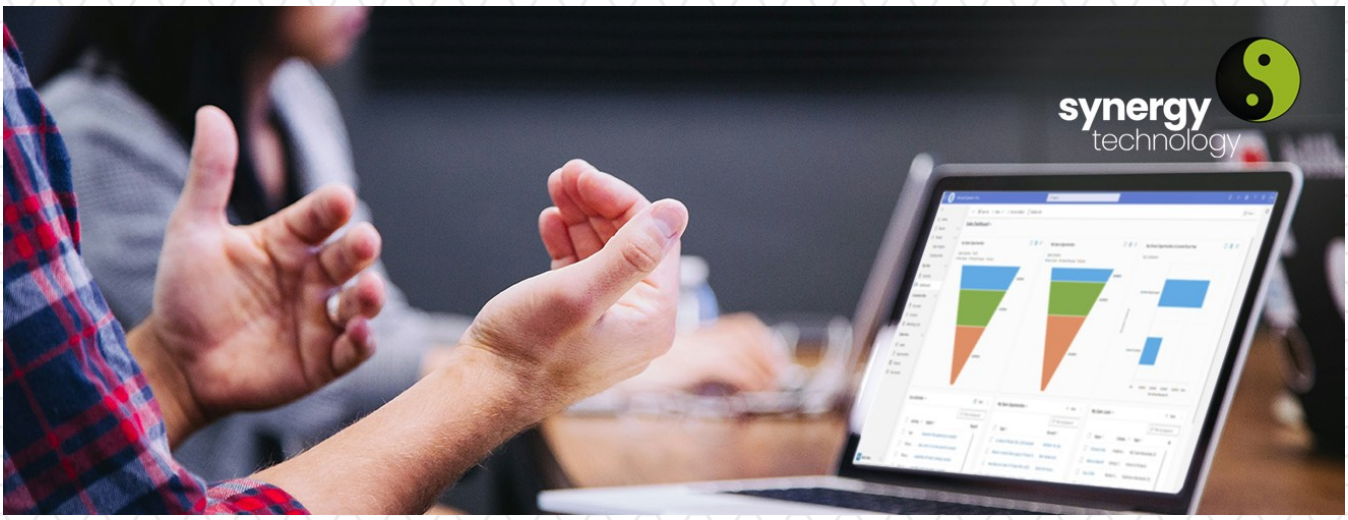
At Synergy Technology, we know that many UK small and medium-sized enterprises (SMEs) want the benefits of Microsoft Dynamics 365 Sales but don't need, or can't justify, the cost and complexity of a full implementation. That's why we created Microsoft Dynamics Hive, a streamlined, cost-effective CRM solution designed specifically for SMEs.

Dynamics Hive is a lighter, easier to use version of Dynamics 365 Sales, with all the tools you need to manage leads, accounts, opportunities, and projects, but without the unnecessary complexity. It's fast to set up, simple to learn, and budget-friendly, and because Dynamics Hive is built on Microsoft technology, it keeps licensing costs low while still providing the full power and flexibility of Microsoft's Dynamics platform.

Who is Dynamics Hive for?

Dynamics Hive is perfect for small to medium sized businesses who:

- Are outgrowing spreadsheets and want a CRM without a big IT project.
- Need to control software costs while improving customer management.
- Want a Microsoft-based system that integrates with Office 365 and Dynamics 365 Business Central.
- Value quick setup and easy adoption by sales teams.



Why choose Dynamics Hive Over Dynamics 365 Sales?

Lower Cost, Same Core Functionality

Hive uses a different licence structure to Dynamics 365 Sales. That means you can equip your whole team at a fraction of the cost of full Dynamics 365 Sales.

Faster, Simpler Implementation

Unlike full-scale CRM deployments, Hive can be scoped and installed quickly. Less time planning and configuring means lower project costs and a faster route to value.

Focused on the Features That Matter

Our extensive experience of working with UK SMEs over the past 25 years has given us a good idea of what the majority need, and what they don't. Because of this, Dynamics Hive includes all the essentials: Dashboards, Activities, Accounts, Contacts, Leads, Opportunities, Projects, and Marketing Lists. These are delivered in a simplified, user-friendly way, so your team can start working straight away.

Designed for SMEs

Most SMEs don't need the advanced (and expensive) features designed for large enterprises. Dynamics Hive focuses on what matters to you; winning new business, managing customer relationships, and tracking performance.

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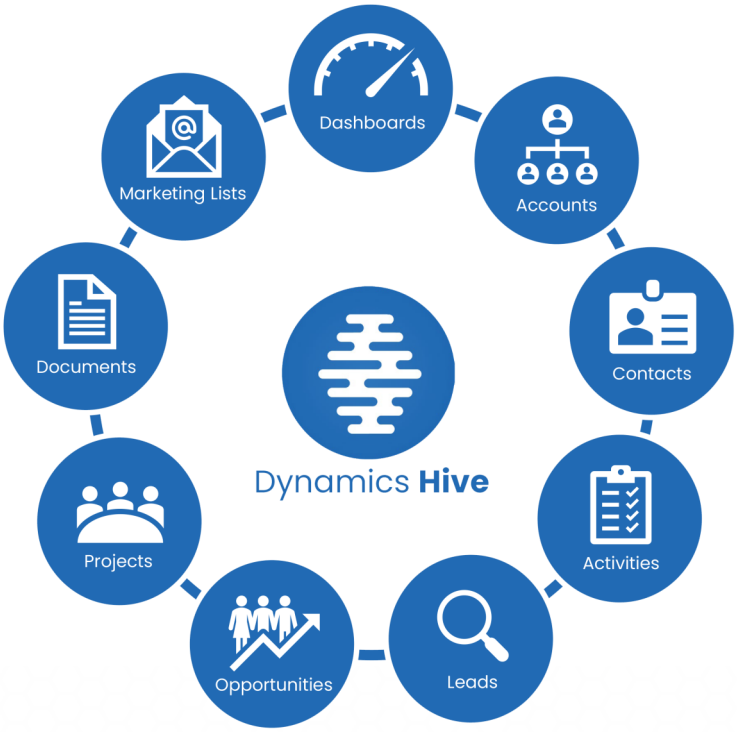
Key features of Dynamics Hive



Dashboards

The Dashboards in Dynamics Hive give your team instant visibility of what matters most across sales. You get a set of ready-made views focused on Opportunities and Activities, including weighted and unweighted pipeline charts that clearly show the health and value of your pipeline. These simple, visual dashboards make it easy for managers and salespeople to track progress, spot risks early, and prioritise the next best actions without needing to build complex reports.

Activities

Activities in Dynamics Hive give every user a clear, up-to-date view of their tasks, calls, emails, and appointments in one place. This keeps everyone organised, focused, and fully aware of what needs to happen next with each customer.

Accounts and Contacts

We've simplified these screens to make them quicker and easier to use. You'll see all the important details at a glance, plus extra features like:

- Automatic tracking of last activity and opportunity dates
- Integrated maps for addresses
- Clean tabs for contacts, activities, and documents
- Leads and Opportunities

Streamlined lead and opportunity management helps your sales team focus on converting prospects. Hive replaces complex business process flows with simpler stages and types you can configure yourself, without needing a consultant.

Projects

Unlike many CRMs, including Dynamics 365 Sales, Dynamics Hive includes a full Projects module. This makes it easy to group related opportunities, activities, and documents into a single, organised view, giving you a full picture of progress and performance. Each project record captures key details such as type, stage, start and end dates, name, description, and the linked account and contact.

Document Management

Centralised document management makes it easy to store, share, and track files linked to customers, contacts, opportunities, and projects. You can upload existing documents, generate new ones from templates, and even version or convert to PDF. This is all additional functionality developed by Synergy Technology and is not contained in Dynamics 365 Sales by default.

Integration with Business Central

Our optional add-on Harmoniser gives you a real-time connection between your Dynamics Hive and Microsoft Dynamics 365 Business Central. Harmoniser keeps accounts, contacts and key sales information in sync across both systems, so your teams are always working from one version of the truth rather than rekeying or reconciling data by hand.

Sales users can see vital Business Central information such as order values and credit limits directly from within Dynamics Hive, while finance and operations benefit from more accurate, timely customer and pipeline data to support forecasting, cash flow, and fulfilment decisions.

Benefits to Sales

- Quote based on pricing and stock data stored in Business Central.
- Real-time visibility of transactional data from within the CRM (e.g. balances, invoices)
- Make informed decisions based on transactional information.

Benefits to Finance

- Finance stays in control of pricing.
- Ensures that every quote respects your pricing rules, discounts, and margin targets.

Benefits to Management

- Full visibility across the entire customer journey.
- Eliminate data silos with “one version of the truth” across sales and finance.

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Marketing Integration

Marketing automation platform eMarketeer adds powerful, easy-to-use marketing automation to Dynamics Hive, so your marketing and sales teams can work from one joined-up platform instead of juggling separate tools. It brings email marketing, campaigns, events, SMS, web forms, surveys and website tracking into a single environment, then pushes the right data back into Dynamics Hive so sales can see exactly how engaged each contact is and what they are interested in.

All key marketing activities are viewable in Dynamics Hive as timelines, engagement scores and journeys, giving sales instant insight into who to call next and why. Marketing can use CRM lists and segments directly inside eMarketeer to build highly targeted, automated journeys, while consent and subscription preferences stay in sync to keep you GDPR-compliant without extra admin. The result is a constant flow of qualified, sales-ready leads into Dynamics Hive, with full engagement history and clear next steps, helping your team close more business with less effort

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Seamless Integration with Microsoft 365

Because Dynamics Hive is built on Microsoft technology, it works natively with the Microsoft tools your team already uses every day.

- **Outlook & Exchange:** Track emails, meetings, and tasks directly within your CRM.
- **Teams:** Collaborate on opportunities and projects in real time.
- **SharePoint:** Store and manage documents in one place, accessible from CRM.
- **Excel:** Export and analyse data instantly without messy imports or add-ons.

This means your sales and customer service teams can work more efficiently, with all their information connected across familiar Microsoft applications.

Why do SMEs choose Dynamics Hive over other CRMs?

Many SMEs look at systems like Salesforce, HubSpot, or even full Dynamics 365 Sales. But these can be over-engineered and expensive to implement for what smaller teams really need.

Dynamics Hive offers the perfect balance:

- **Lower cost** than Dynamics 365 Sales.
- **Greater flexibility** than off-the-shelf CRMs.
- **Seamless integration** with Microsoft 365, Business Central, and eMarketeer.
- **Room to grow,** if your business needs more advanced features in future, Dynamics Hive sits on the same Microsoft platform as full Dynamics 365 Sales, so you can scale up when you're ready.

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Why choose Synergy Technology?

When you choose Dynamics Hive, you're not just choosing software, you're partnering with a team that understands your business. Synergy Technology brings deep experience, recognised credentials, and SME-focused expertise. Here's why we're the right choice:

Microsoft-Certified, Partner-Level Expertise

Synergy Technology holds Microsoft Solutions Partner: Business Applications status. That means Microsoft recognises us as a trusted provider of Dynamics and Power Platform solutions, with proven capabilities in deployment, support, and customer success.

Microsoft Solutions Partner
Business Applications
Specialist
Small and Midsize Business Management

On top of that, we've earned the Microsoft Small and Midsize Business (SMB) Management Specialisation, a certification reserved for partners that can demonstrate excellence in delivering solutions tailored to smaller and mid-sized companies. We are one of only around 20 Microsoft Partners in the whole of the UK to hold this designation.

Here's what some of our customers say about us:

"It was implemented in a relatively short period of time and proved effective quite quickly for the business. The expertise of the Synergy tech team made the process very easy."
Head of Technology
SES Secure.

"One thing we see as a great benefit of working with Synergy is being able to draw on their experience of working with other companies who are similar to ours and face the same challenges."
Sales Manager
InVentry.

"The team is very knowledgeable. I understand the system reasonably well, but they live and breathe it. From a consultancy perspective, the process is always very thorough."
Marketing Manager
Vygon UK.

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Expertise Focused on SMEs

Because we specialise in small and mid-sized businesses, we know the unique challenges you face, limited budgets, tighter resource constraints, fast growth requirements, and the need for practical, user-friendly solutions.

We don't build over-engineered systems. We build solutions like Dynamics Hive, powerful enough to manage your business but lean enough to deliver quickly and affordably.

Experience with Microsoft Dynamics and Power Platform

We aren't newcomers to Microsoft technology. Over many years, we've implemented, integrated, customised and supported Dynamics 365, Power Platform, and related solutions across multiple industries. That experience means we understand not only "what can be done," but what works in real businesses.

When designing Hive, we applied all this knowledge: which features matter, which ones cause complexity, and how to make systems people will actually use.

"I think the account management has been the best I've ever experienced with any sort of tech implementation"

Operations Manager
RAM Universal.

"Synergy Technology's approach demonstrated a deep understanding of our unique business needs. The solution was customised to align with our goals."
Sales Director
Wright Engineering.

"They have supported us above and beyond what is expected and provide excellent ongoing technical support and guidance, encouraging us to get the most out of the CRM system."
Owner
Contender UK.

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Continuity, Integration, and Future Growth

Since Dynamics Hive is built on the Microsoft stack, choosing us ensures your CRM can grow with you. We can integrate Hive seamlessly with Microsoft 365, Outlook, Teams, and Business Central. If one day you need more advanced features, we already live in the same ecosystem, so scaling up is smoother and less disruptive. As your partner, we'll guide you through that growth path, not force you into a costly platform change later.

Reliable Support & Ongoing Optimisation

Our relationship doesn't end at deployment. We offer comprehensive support, training, and continuous improvement services. Our goal is your long-term success, not just a completed project. As a Microsoft-certified partner with the SMB Specialisation, we operate to high standards of quality, responsiveness, and customer care.

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