Liaison Central + Contact Manager

VAR Q&A — quick reference for live demos

1. Zero setup. Zero onboarding. No proprietary lock-in.

This is the message marketing wants out front. Lead with it every time.

Q: How long does setup take?

A: Thirty seconds per user. Open Liaison User Setup, check a box. They're in. The product itself installs in under five minutes from AppSource. Zero required configuration. No fields to map, no workflows to design, no proprietary data model to learn. The day a user is granted access is the day they're productive.

> ↳ *"If your customer can install Microsoft Office, they can install Liaison."*

Q: How does that compare to the competition?

A: Salesforce: 8-16 weeks of consultant time at $150-200/hour — call it $50K-$100K before the first user logs in. HubSpot: 2-4 weeks of admin setup and integration plumbing. D365 Sales: 4-8 weeks of partner-led implementation. Liaison: install, grant access, work. Same day.

> ↳ *"You'll be productive in Liaison before your CRM consultant returns your phone call."*

Q: Why the difference? What did the competition build that you didn't?

A: They built proprietary data models. Custom Account objects, custom Activity logs, custom pipeline stages — none of which know about your ERP. Every implementation becomes a translation project. We didn't build any of that. We use BC's data — Customer, Vendor, Contact, Salesperson — directly. Nothing to map because nothing is new.

> ↳ *"Other CRMs ask the customer to feed two systems. Ours feeds one — BC."*

Q: Total cost of ownership comparison?

A: For 50 users in year one: Salesforce ~ $230K (license + implementation + admin). HubSpot ~ $80K. Liaison Contact Manager: $17,400. Roughly 1/13 the year-one cost of Salesforce, lower every year after.

> ↳ *"Deploy Liaison to your whole BC user base for less than the consultant fee on phase one of a Salesforce rollout."*

Q: What's the data lock-in story?

A: Opposite of lock-in. Notes go on BC's Contact record. Follow-ups link to BC's Salesperson and Contact tables. Opportunities are BC Opportunities. If the customer ever uninstalls Liaison, every interaction stays on BC tables where it belongs. Try uninstalling Salesforce after three years and exporting your data.

> ↳ *"Other ISVs hold customer data hostage. We hand it back to BC every time."*

2. What is this — really?

Q: So what exactly is Liaison Central? Is this a CRM?

A: It's a daily execution layer that sits inside Business Central. We're not replacing BC's CRM — we're making it usable. BC already has Contacts, User Tasks, Opportunities, Interaction Log, Quotes — all great features, all scattered across different pages. Liaison Central pulls them onto one home screen so the BC user can actually spend their day there.

> ↳ *"We're not bolting a CRM onto BC. We're surfacing the CRM that's already inside BC."*

Q: How is this different from D365 Sales or Salesforce?

A: Different problem. D365 Sales and Salesforce are sales-pipeline systems — built around opportunities, leads, forecasts. Liaison is built for the people who already have customers — the AR clerk, the inside salesperson, the purchaser following up with vendors. It's a relationship execution tool for ERP users who live in BC all day. $29 per user, not $95 or $165.

Q: Walk me through what a typical user sees on day one.

A: They open Liaison Central. They see their Planner — every open follow-up prioritized by date, oldest and most overdue first. They click a task. The Contact Dashboard opens with that customer's full context: last call, next call, open invoices, quotes in flight, recent emails, notes. They make the call, log the outcome, set the next follow-up, move on. End of day, 30 contacts logged, every interaction on the BC Contact record.

↳ *"Open to a task list, work the list, go home."*

3. Product details that come up

Q: How does it handle a company that's both customer AND vendor?

A: Same dashboard, both relationships visible. Header shows "Adatum (C)(V)" — both relations tagged. The BC slidekick adapts to whichever side you're working: Sales Quotes when in Customer mode, Purchase Orders when in Vendor mode. One contact, one relationship view, full context.

Q: What about prospects?

A: First-class entities. Tag a Contact-Company as a Prospect (no business relation), they show up in the dashboard with the Prospect filter. Write Sales Quotes against them, log calls, schedule follow-ups — all without forcing them to be a Customer first. When they convert, one click makes them a Customer in BC and everything you logged comes along.

↳ *"Pipeline tracking that doesn't pollute your AR records."*

Q: Aren't you just rebuilding what's already in BC?

A: Opposite — We enhance BC, we don't replace it. BC already has the building blocks — Contacts, Salespeople, Opportunities, Interaction Log, Sales and Purchase documents, Tasks. They're powerful, but scattered across pages and never designed for the user who lives in BC all day. Liaison adds the workflow surface that pulls them together: a unified Contact Dashboard, a single unified Planner, and role-based Slidekicks that give direct access to the user's most-used Business Central features without ever leaving the screen they're on.

We also add a small set of Liaison-specific enhancements where BC didn't go far enough — extended Copilot integration, timestamped Notes for sales and marketing (deliberately separate from the Notes attached to Cards), Follow-Up dates, and user-definable Forms (a.k.a. Liaison Sheets). Uninstalling Liaison would cost the customer access to these Liaison-specific records, but the BC core data stays in BC, exactly where BC put it.

↳ *"BC has the data. We built the day."*

Q: How does the Planner differ from BC's User Tasks?

A: BC's User Tasks are user-private and disconnected from the records they relate to. The Liaison Planner is the unified daily queue — every commitment a salesperson or buyer is responsible for, from every BC source that already tracks them: Opportunities, Contact Tasks, User Tasks, Quotes, plus the events Make My Day mines from criteria you set and drops into your schedule. One queue, prioritized by overdue date, with one-click drill to the underlying entity. Notes log on the relationship, not on a side table.

↳ *"BC's User Tasks are sticky notes. Our Planner is the day."*

4. Commercial questions

Q: How does the 20% revenue share actually work?

A: Microsoft handles the entire transaction through AppSource as a Multi-Party Private Offer. ***Customer pays Microsoft. Microsoft pays your firm 20%*** — every month, automatically, for the lifetime of the customer. No invoicing on your end. No collection. No receivable risk.

↳ *"Recurring revenue with zero ops overhead. That's the partnership model."*

Q: Is the 20% locked in?

A: Contractually fixed for the lifetime of each customer through the Multi-Party Private Offer. Microsoft administers the split. We can't unilaterally change it on existing customers.

Q: Volume commitment? Quota?

A: None. Sell one customer or fifty, the math is the same per deal. We're asking VARs to put us in front of customers who would benefit. That's it.

Q: How long until I can start selling?

A: NFR licenses tentatively June 15 — partner internal use, full feature set. First customer deployments July 1. You can demo to interested customers right now via remote demo at (800) 811-4618 ext. 301.

5. When the room pushes back

Q: Sounds too good to be true. What's the catch?

A: No catch — but the fit matters. Liaison shines for any BC user who wears multiple hats during the day: an AR clerk handling collections AND posting cash AND fielding customer questions; an inside salesperson taking orders AND following up on quotes AND chasing late shipments; a buyer managing POs AND vendor relationships AND inventory shortages. That's most accounting and operations roles in distribution, manufacturing, service, and wholesale. The Planner and Contact Dashboard make these multi-hat users dramatically more productive because everything lives on one surface.

For order entry clerks, customer service reps, and salespeople, **training a new hire becomes a non-event**. The Slidekick has *everything* — enter an order, convert to invoice, apply a payment, post a journal entry — all one click away from the customer they're already looking at. No more "type Tell Me and hope you remember the page name." No more cluttered Role Center stuffed with bookmarks that truncate at the edge. Just open the Slidekick — it's all there, organized by what you're doing, not where Microsoft happened to put it.

↳ *"If your users wear more than one hat, Liaison is for them. And training a new user is as simple as 'open the Slidekick.'"*

Q: My customer doesn't see the pain.

A: Then they're not the customer. We're not converting reluctant prospects. The pitch is for the BC user already complaining about jumping between Customer Card, Contact Card, Sales Order, and Outlook 50 times a day. If that complaint isn't being made, this isn't urgent.

Q: Customer wants a bake-off against a real CRM.

A: Run it. Set criteria around speed-to-productive, native BC data, and one-click navigation. We lose on pipeline forecasting — we don't try to be a sales pipeline tool. We win on every other metric that matters to a BC user. Frame it: "this is the right tool for ERP execution, not for sales pipeline."

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