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Dynamics 365 for Construction

A practical guide for commercial contractors evaluating Microsoft Dynamics 365
— what it covers, where it fits, and how to approach a rollout.

A Forge T Labs guide

Why this guide

Most commercial contractors do not have a software problem — they have a disconnection problem.

The bid pipeline lives in a spreadsheet. The money lives in accounting software. RFIs and change orders live in email. The field reports back on paper or not at all. Each tool works; none of them share data. The cost is double entry, version confusion, and a leadership team that cannot see where a project really stands without chasing four systems.

Microsoft Dynamics 365 is one of the platforms most often considered to solve this. This guide explains, in plain terms, what it offers a construction firm, where it genuinely fits, and where it needs help — so you can make an informed decision rather than a hopeful one.

Who this guide is for

Commercial general contractors and construction leadership evaluating Dynamics 365 or a connected construction platform. It assumes no Microsoft background.

What Dynamics 365 actually is

Dynamics 365 is not a single product. It is a family of connected business applications from Microsoft, all sharing one data platform (Dataverse) on the Microsoft Cloud. You license the parts you need. For a construction firm, the relevant applications are:

- **Sales** — the bid pipeline, client relationships and the record of pursued and won work.
- **Customer Service / Field Service** — service requests, work orders and site-based activity.
- **Business Central** — finance, job costing, billing and operations.
- **Customer Insights and Copilot** — the data and AI layer across all of it.

The value is not any single application — it is that they share one customer and project record. Winning the work, doing the work and billing the work stop being separate systems.

Where it fits a construction firm

Used well, Dynamics 365 maps onto the construction lifecycle:

Construction need	Dynamics 365 capability
Bid pipeline & pursuit tracking	Sales — leads, opportunities, win/loss
Client & contact management	Shared Account and Contact records
Project financials & job costing	Business Central with cost codes

RFIs, submittals, change orders	Configured project tables or a construction solution
Subcontractor management	Accounts with role, prequal and compliance data
Field reporting & work orders	Field Service with a mobile experience

The honest part: where it needs help

Dynamics 365 on its own is a general business platform, not a construction product. Out of the box it does not know what an RFI is, or how a two-tier change order works, or what a schedule of values looks like. It suits a contractor best when it is configured for construction workflows — or when a construction-specific solution is built on top of it.

That tailoring is the difference between “a CRM the team resents” and “a system that fits how a contractor actually works.” It is worth factoring into any evaluation: budget for the configuration, not just the licence.

A note on construction solutions

Rather than configure Dynamics 365 from scratch, some firms adopt a packaged construction solution built on the platform. That is the approach behind BuildForge, the Forge T Labs product for commercial general contractors.

How to approach a rollout

The most common mistake is buying the whole platform and rolling it out at once. A more reliable sequence:

- **1. Scope.** Map how your firm wins, runs and bills work today. Identify where the disconnection costs you most — that is where to start.
- **2. Start with one area.** Often the bid pipeline or project financials. Prove value in one place before expanding.
- **3. Configure for construction.** Cost codes, RFIs, change orders, subcontractor data — the tailoring that makes it fit.
- **4. Connect and expand.** Add the next application once the first is adopted. The shared data model means no re-keying between them.
- **5. Add AI deliberately.** Copilot and document automation pay off once the data foundation is sound — not before.

Readiness checklist

A few questions worth answering before you commit:

- Do we know which single area of the business hurts most from disconnection?

- Have we budgeted for construction-specific configuration, not just licences?
- Do we have a Microsoft 365 tenant already, or is that part of the project?
- Who internally will own the system after go-live?
- Have we decided: configure Dynamics 365 ourselves, or adopt a construction solution?

Next step

If a short, no-obligation scoping conversation would help, Forge T Labs is a Microsoft ISV partner specialising in real estate and construction. Reach us at cssupport@forgetlabs.com or via forgetlabs.com/contact.

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