

The parts of Dynamics you keep rebuilding

Inline editing, relationship intelligence and in-form context, on any table, as six code components

Every Dynamics project rebuilds the same handful of things: a subgrid people can type into, a way to see behind a lookup, an answer to who changed this field. DEX Pro Core ships them as six code components that drop onto the forms you already have, on any table.

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CODE COMPONENTS, ON ANY TABLE	CALL NO EXTERNAL SERVICE AT ALL	PLUGINS, PROCESSES OR SERVER CODE	MANAGED SOLUTION, MINUTES TO INSTALL

WHAT IT ACTUALLY DOES

Every subgrid, **editable in place**.

A standard subgrid makes a user open a record to change one number. The DEX Editable Grid replaces it with a table you type into: click a cell, type, click away, and the row saves itself. Columns sort, rows delete, and an add button opens a quick-create with the parent already filled in and further values copied from it. Security roles decide who may edit, save, delete and add, down to the individual column. On a phone held upright the same grid becomes a card list with 44 pixel steppers and a bulk edit dialog; turn the device sideways and the full table returns.

Every relationship, **scored from its own history**.

DEX Sentinel 360 reads the emails, calls, meetings, notes, cases and work orders logged against a record and turns them into a health score out of 100, a churn probability, a sentiment timeline with a four step forecast, and a ranked list of what to do next. It shows its working: the score breaks into five drivers, the churn figure lists what raised and lowered it, and every interaction carries a why link that names the exact words behind its score. The scoring runs in the browser against your own Dataverse, with no backend at all, and it writes nothing back to the record.

Every lookup, audit trail and address, **in the form**.

Three small components remove three daily interruptions. The Lookup Preview Popover shows the key fields of a linked record in place, with five tables built in, any other configured in one property, and a plus button that lets each user add their own fields, stored per user in Dataverse so a choice made on a laptop is already there on the phone. The Field Audit Lookup puts one column's audit history one click from that column, formatted for reading: choice labels instead of numbers, record names instead of identifiers, times in the reader's own locale. And the Google Address Autocomplete turns a text field into an address search that fills city, state, postcode, country and coordinates in a single write.

And an assistant that reads the record, not the internet.

The Dex AI Assistant is a chat panel grounded in the open record and its related rows. It answers from what is actually on the record, finds other records by name, searches the attached documents and reads what is inside them, exports the whole picture to Excel or a Word briefing, and writes follow-ups back to the timeline when the user presses Apply. The model call goes to an endpoint you host, and its contract is published in full, so you can build against it, audit it, or point it at a service you already run.

Where it shows up

- **Any subgrid** - inline editing, role gating down to the column, bulk edit and a phone card layout
- **Any lookup** - the linked record previewed in place, with fields each user chooses
- **Any column** - its own audit history behind one button
- **Any text field** - Google Places address capture that fills the fields around it
- **Account, Case, Work Order, any table** - relationship health, churn risk, a sentiment forecast and next best actions
- **Anywhere a question gets asked** - an assistant grounded in the record in front of you

Why buyers choose it

- **It works on your tables, not ours.** Every column name, threshold and option value is a property you set. The Field Service and Sales names it ships with are defaults to overwrite, not requirements. One control, configured differently on two subgrids, without a second view or a second form.
- **Priced per organization.** Your read-only users, admin accounts and service accounts do not turn into an invoice. Declare a band, pay once a year, and grow inside it at no extra cost.
- **Your security model, unchanged.** Everything runs as the signed-in user through the ordinary API. Row ownership, business units and field-level security apply exactly as they already do. It cannot show anyone anything they could not already see.
- **No server footprint.** No plugins, no workflow assemblies, no service account, no external store. Six code components and one small table. An uninstall removes all of it.
- **Documented like enterprise software.** Every formula, threshold, query and on-screen message is published in a 94-page user and administrator guide. When a number looks wrong, you look it up instead of raising a ticket.
- **Honest about the two that reach out.** Four of the six components call nothing outside your tenant. The assistant calls an endpoint you host and control; the address field calls Google with your own key. Both are documented to the request, and both are optional.

Straight about who builds it

DEX Pro Core is built and supported by one engineer, and that shapes what you get. You deal with the person who wrote the code, so an answer is an answer rather than a ticket routed twice. What a larger vendor offers instead is continuity, and that is covered explicitly rather than glossed over: the documentation is complete enough to hand to any Dynamics partner, source code escrow is available on the larger bands, and implementation partners can be engaged to deploy and support the product where you would rather have a firm than a person.

At a glance

ITEM	DETAIL
Product	DEX Pro Core Solution 5.2.0.0, managed, from Dynamic Experts Ltd.
Platform	Microsoft Dynamics 365 and Dataverse, model-driven apps
Contents	Six code components and one custom table
Install	Import, publish, place each component on the form or subgrid you want it on
Prerequisites	None. No first-party application is required
Server footprint	None. No plugins, no assemblies, no service account, no external store
External services	Two components, both optional: an endpoint you host for the assistant, a Google Maps key for the address field
Licensing	Per organization, annual, banded by user count. Non-production environments free
Evaluation	30 days in your own sandbox, full functionality, no card
Documentation	A 94-page user and administrator guide, shipped with the product

Put it on your own forms

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