



CloudFronts Smart Pitch (AI Foundry) - User Manual

Prepared by:



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Prepared for:

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Document Version Information

Version	Created by	Date	Comments
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1.0	Shashank Keny	14 th July 2025	Initial Draft
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1. Introduction

CloudFronts SmartPitch is an AI-powered chatbot designed to assist Sales and Marketing teams in accelerating the sales process. The chatbot helps with:

- **Creating tailored elevator pitches** for prospects & clients and generating an appropriate MQL-SQL Document for the given client and its contact person, from openly available data sources.
- Providing relevant details of the prospective company and its contact person.
- Providing relevant details of past work, specifically to the region & industry of the new prospective client and providing similar use cases
- **Extracting insights from Case Studies & success stories** to surface relevant client data, sales history, and key opportunities.

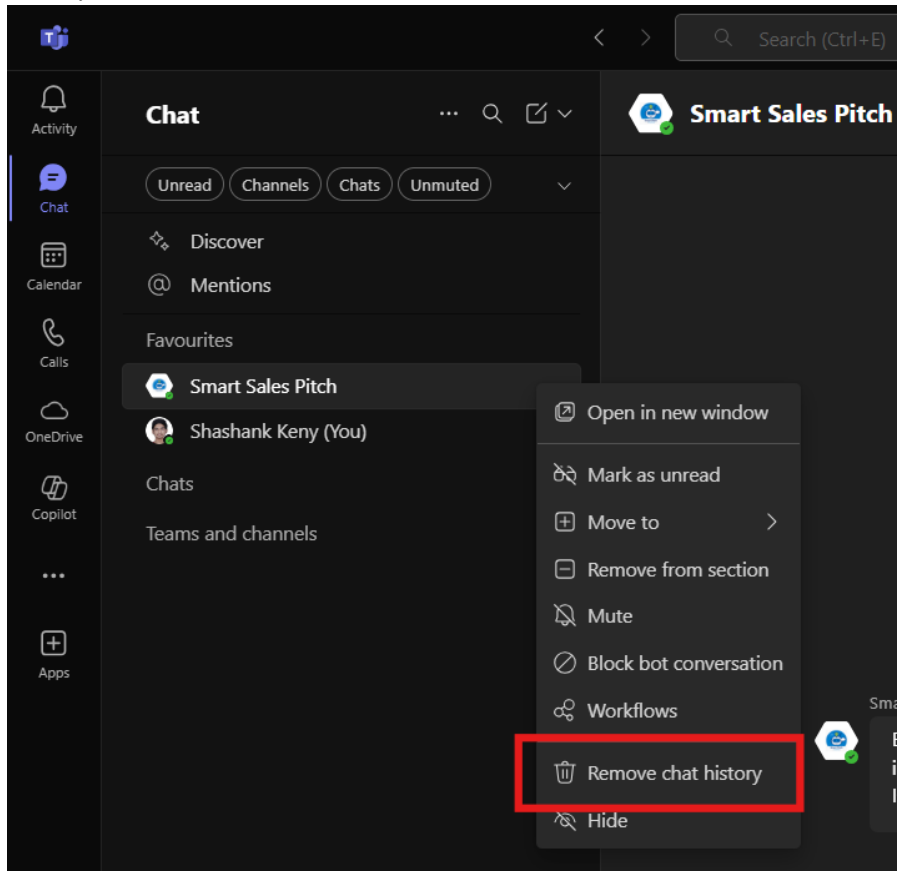
2. Getting Started

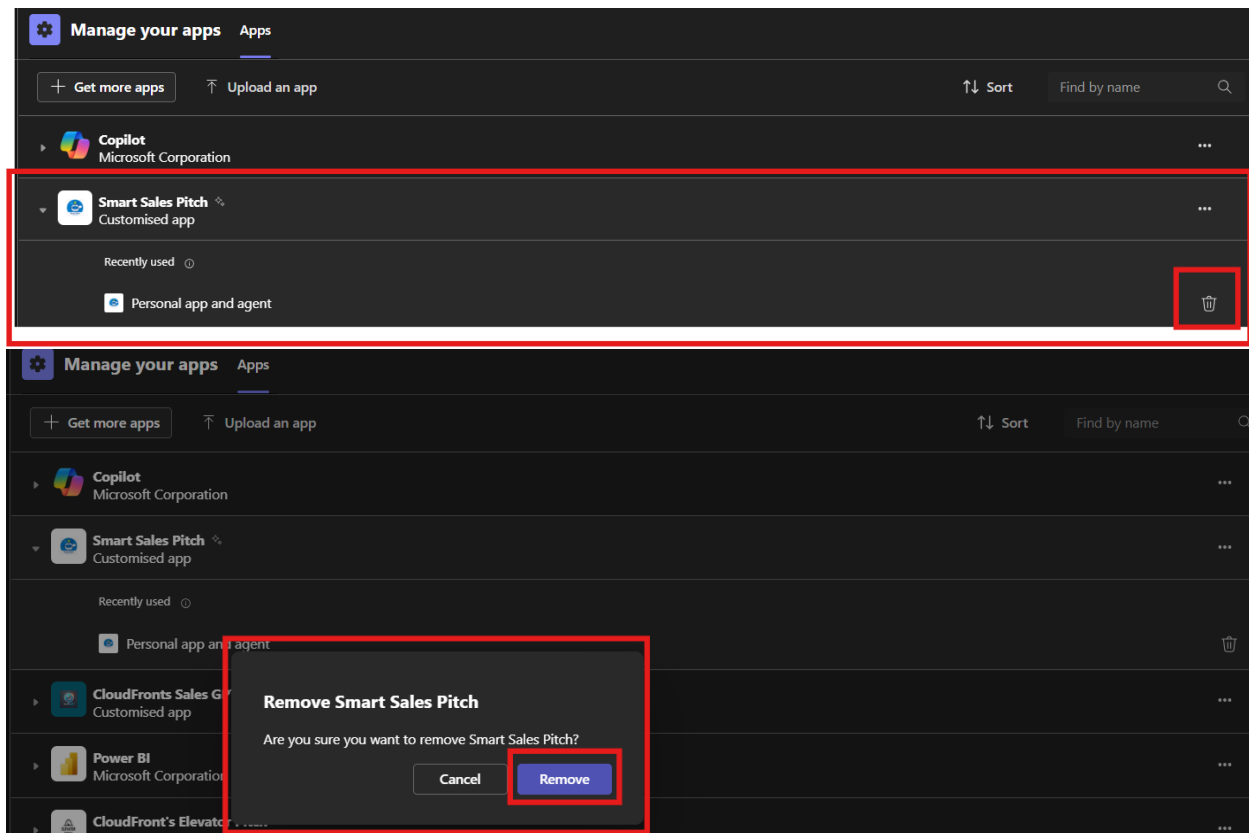
System Requirements

- Latest version of Microsoft Teams App installed on your system.
- Access to CloudFronts CRM Dataverse and SharePoint (if required for knowledge sources)

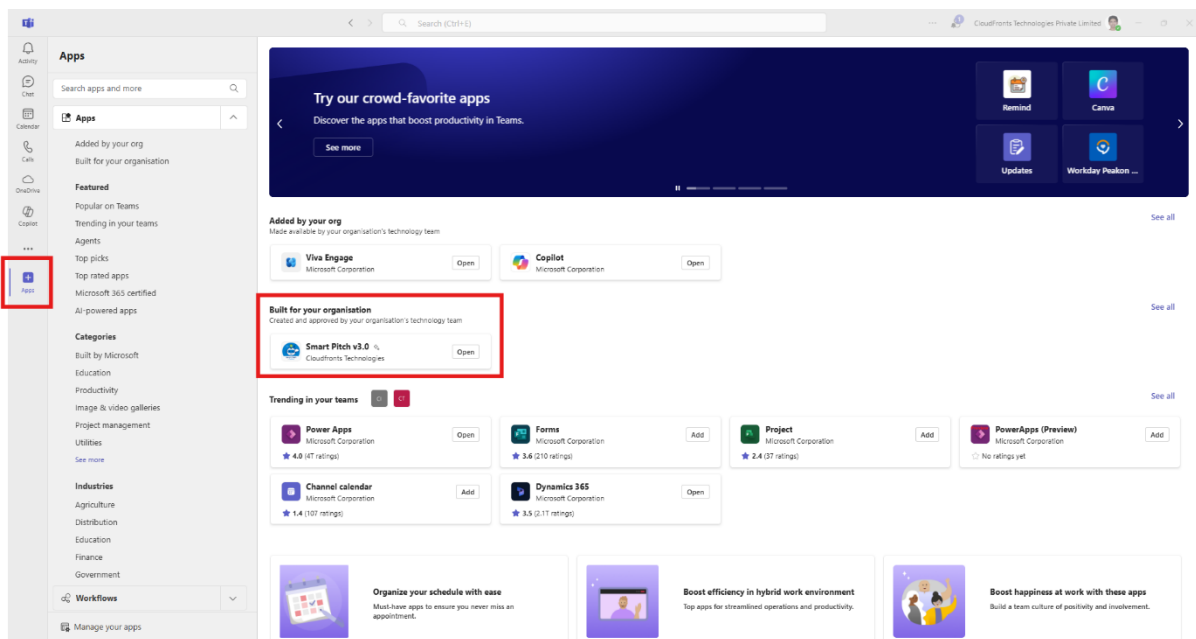
Installing CloudFronts Smart Pitch

1. Remove the older version of Smart Pitch. If it has already been installed before, erase its chat history and then uninstall it.

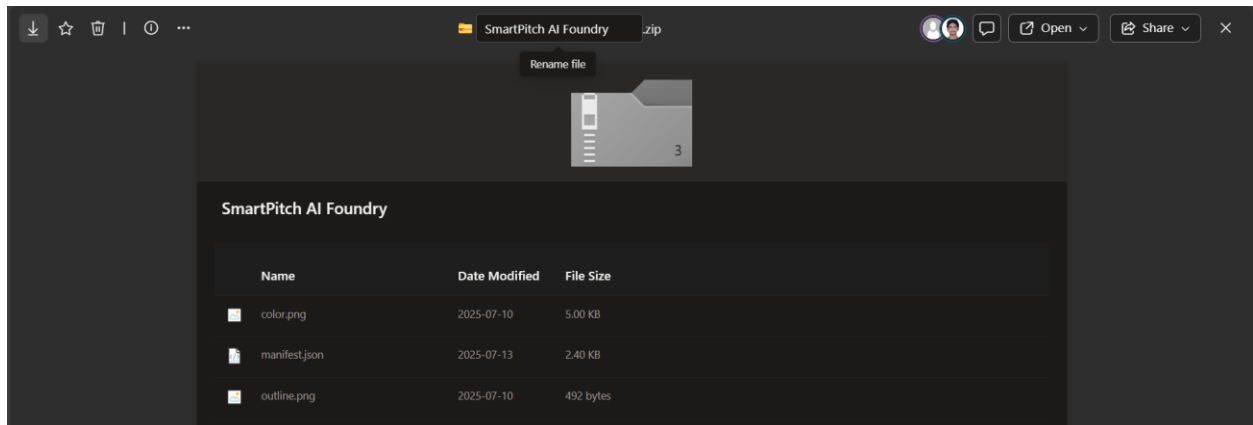




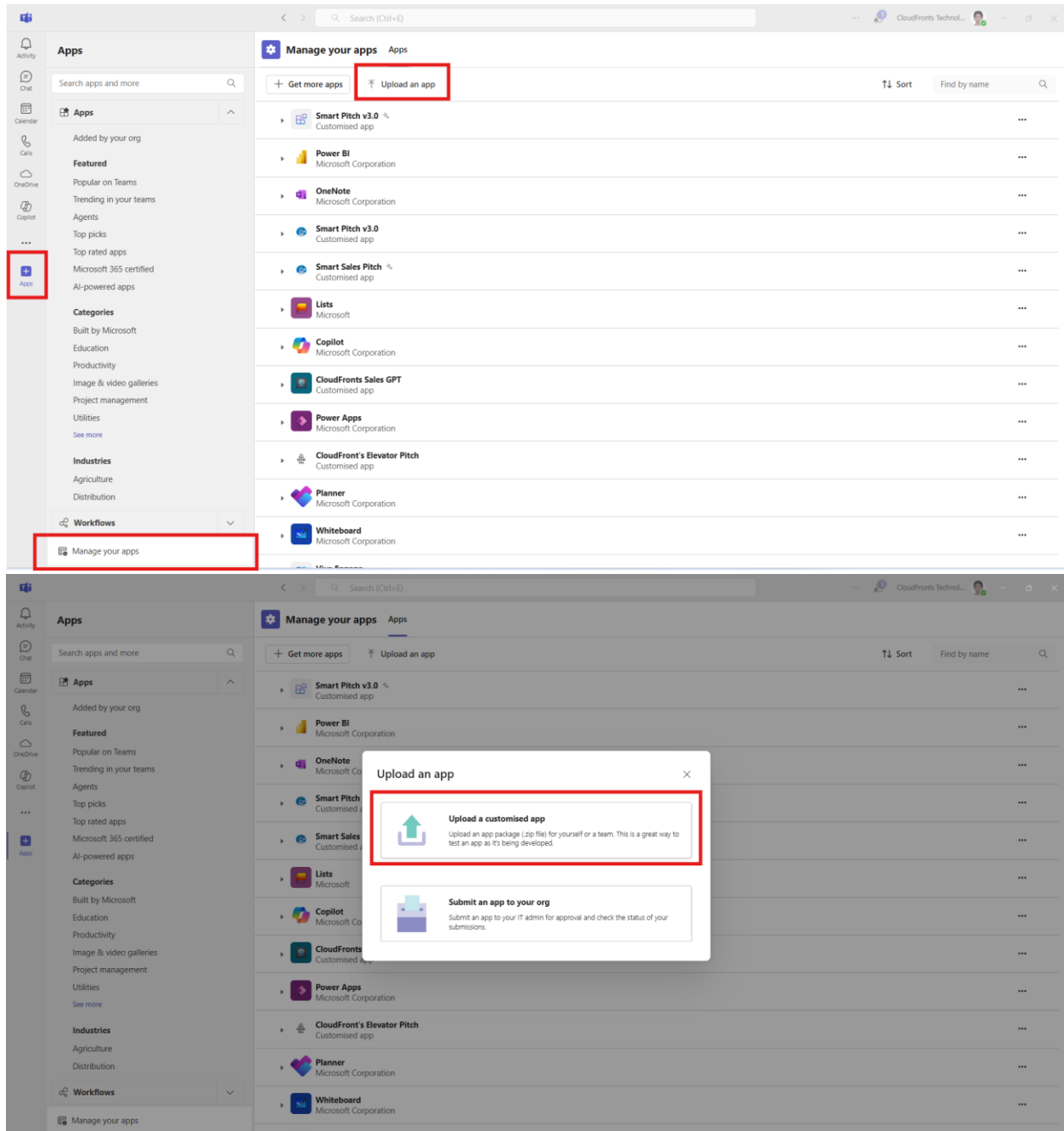
2. Install from Teams -> Add -> Organization apps



3. Install from this link directly on teams - [Smart Pitch AI Foundry](#)
4. Install via the given link - [SmartPitch AI Foundry](#), and follow the steps to install it on teams.
 - a. Download the zip file from the given link



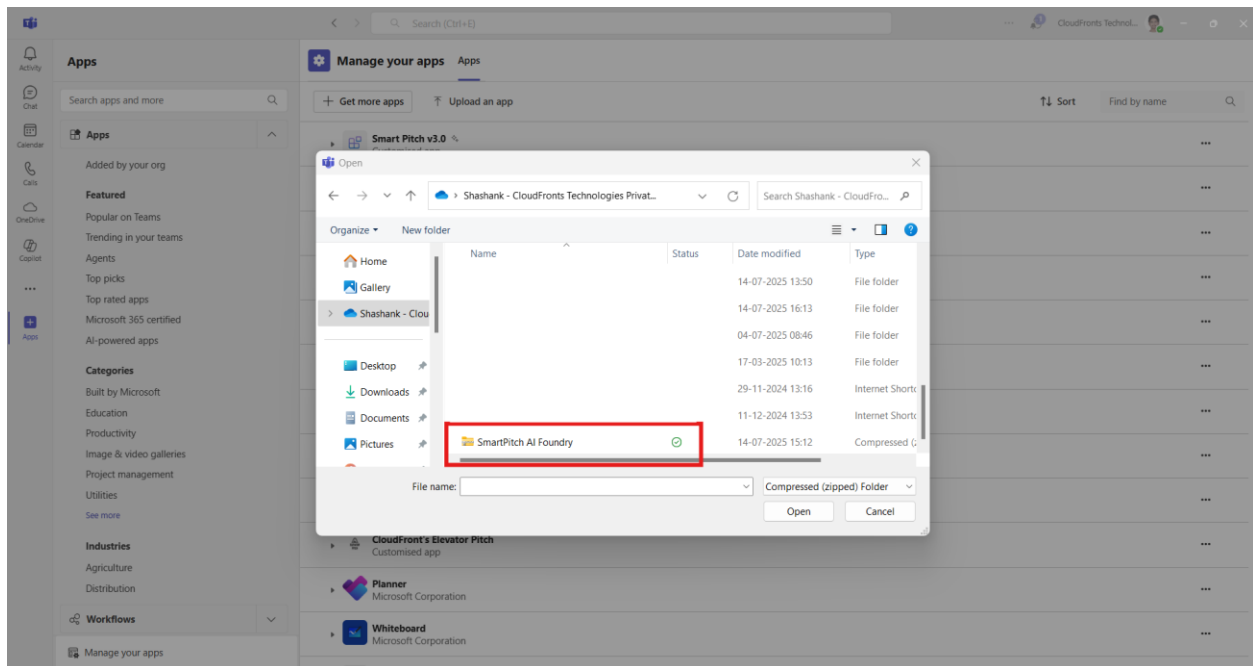
- b. Select Apps -> Manage your Apps -> Upload an App and upload the zip file just downloaded.




The screenshot displays the Microsoft Teams 'Manage your apps' interface. On the left sidebar, the 'Apps' icon is highlighted with a red box. The main pane shows a list of installed apps, with the 'Upload an app' button highlighted by a red box. A modal dialog titled 'Upload an app' is open, showing two options: 'Upload a customised app' (highlighted with a red box) and 'Submit an app to your org'.

Upload an app


- Upload a customised app**
Upload an app package (.zip file) for yourself or a team. This is a great way to test an app as it's being developed.
- Submit an app to your org**
Submit an app to your IT admin for approval and check the status of your submissions.





Smart Sales Pitch

CloudFronts

Add

OverviewPermissions

This AI-powered Copilot agent is designed to assist sales, presales, and business

This AI-powered Copilot agent is designed to assist sales, presales, and business development teams by intelligently identifying and capturing client-related requirements or leads from natural conversations.


The agent can:

- Detect whether a message refers to a Client Requirement or New Lead/Opportunity
- Extract key details such as:
 - Client Name
 - Industry
 - Region/Location
 - Purpose or Use Case
- If any details are missing, it engages the user with follow-up questions to gather complete information
- Outputs the data in a structured format for further CRM entry, triaging, or follow-up

App features

Bots

By using Smart Sales Pitch, you agree to the [privacy policy](#), [terms of use](#), and [permissions](#).




Smart Sales Pitch

Added successfully!

How would you like to use this app today?

Open

 Open with Copilot

Or choose a place to use the app

3. Features and Capabilities

Conversational Topics


1. **Smart Pitch (MQL-SQL):** Provides relevant details of the client company, and its contact person. It provides a list of companies if there are many companies having the same name, from which the user can verify and proceed with the prospect of his/her requirement.
 - a. It further provides use cases like client requirement, and work done in region or industry like the client. It then generates a pdf document as per user instruction.
2. **Content Search:** Helps users ask direct questions on case studies and organizational documentation.

Functions of the Copilot

1. Searches and summarizes case studies, specifically aligned to client company's industry & region. A List of companies is provided if there are many companies with same name.
2. Generates elevator pitches and structured responses based on client and contact person data.
3. Provides an MQL-SQL pdf for download for the given Client company & it's contact person.

4. Using CloudFronts SmartPitch

1. Start or trigger a conversation by typing in "Hi", and select **any of the given options namely –**
A] **Smart Pitch (MQL-SQL)** or B] **Content Search**
Here you can directly select options by typing in their serial no. or by typing in the actual labels – SmartPitch/MQL-SQL or Content Search


Smart Pitch
Chat
Shared

10:57

Hi

Smart Pitch 10:57

Hello!

Let's get started. Please choose an option:

1. **Smart Pitch**
2. **Content Search**

Let me know your choice to proceed.

10:58

1

Smart Pitch 10:58

Hello!

You've selected **Smart Pitch**.

To proceed, please provide the following details for the prospect:

- **Company Name**
- **Contact Person Name**
- **Requirement**

(Location and Email are optional—proceed with whatever you provide).

You may enter the details in this format:

Company Name

Contact Person Name

Requirement

Let me know the details to get started!

11:04

Borg Galea & Associates, , Nathaniel Borg, , Integration + Power BI

View prompts

Here, SmartPitch would prompt you to provide the :- Prospect name, contact person and requirement information, optionally you can also provide the prospect location and contact email if prompted to improve the search results.

Smart Pitch 10:35



Hello! Welcome to Smart Pitch.
Please provide the following details to proceed:

- **Company Name**
- **Location** (optional)
- **Contact Person**
- **Email** (optional)
- **Requirement**

Once you share the above, I'll get started on your Smart Pitch!

10:38

Borg Galea & Associates, , Nathaniel Borg, , Integration + Power BI

Smart Pitch 10:38



Hello! You've selected **Smart Pitch**.
To get started, I need the following prospect information:

- **Company Name:** Borg Galea & Associates
- **Location (optional):** (Not Provided)
- **Contact Person:** Nathaniel Borg
- **Email (optional):** (Not Provided)
- **Requirement:** Integration + Power BI

Let me search for companies similar to "Borg Galea & Associates."

Please wait while I pull the company information for you. Here is the Smart Pitch for:

- **Company Name:** Borg Galea & Associates
- **Contact Person:** Nathaniel Borg
- **Requirement:** Integration + Power BI

Generating MQL-SQL

2. Smart Pitch (MQL-SQL): - Provide details such as **Client Name** and it's **Contact Person Name**

For Client Company name -

- Company Name
- Company Size (Number of employees)
- Headquarters (Location)
- About Company (Summary)
- Company Website
- Company LinkedIn (Professional profile)


These fields provide a structured overview of the company's identity, operations, and digital presence.

For the Contact Person -

- Contact Person Name
- Location
- Decision Maker or Influencer

- Contact Person LinkedIn Profile

These fields help categorize professional contact details and their role in business interactions.


Smart Pitch Chat Shared

Now, I will proceed to find 3 case studies matching:

1. **Similar Requirement (Integration + Power BI)**
2. **Region (Malta/Europe)**
3. **Industry (Professional Services/Accounting/Consulting)**

Please hold on a moment while I pull up the relevant case studies. Here is all the information you requested for Borg Galea & Associates, along with 3 relevant case studies each matched to similar requirements, industry, and region.

Company Information
Company Name: Borg Galea & Associates
Headquarters: Malta
Industry: Professional Services (Accounting & Consulting)
About: Borg Galea & Associates is a Malta-based professional services firm offering accounting, audit, tax, and business advisory services. They provide tailored solutions that help clients maintain compliance and enhance business performance. With expertise serving both SMEs and international clients, Borg Galea & Associates leverages Malta's position as a financial center to deliver value-driven solutions.
Revenue: Not publicly available
Company Size: Not publicly specified
LinkedIn URL: [Borg Galea & Associates](#)
Company Website: [borggalea.com](#)

Contact Information
Contact Person Name: Nathaniel Borg
Location: Malta
Designation: Founder and CEO
Decision Maker: Yes
LinkedIn URL: [Nathaniel Borg - LinkedIn](#)

Requirement: Integration + Power BI

If there are many companies with same name, SmartPitch chatbot would return a list having companies with same/similar name; from this the user can select the company concerned and proceed.

The list would include the company's exact name, location, and summary.



Thank you for the additional information. Here is the updated result for SIP Industries based in Houston:

1. Company Name: SIP Industries

Headquarters: Houston, Texas, United States

About:

SIP Industries is a leading manufacturer and distributor specializing in industrial pipe, fittings, and flanges. With its headquarters in Houston, Texas, the company caters primarily to the oil, gas, petrochemical, and construction industries. SIP Industries offers a wide range of carbon steel, stainless steel, and alloy steel pipe products. Their inventory solutions are tailored to clients needing prompt deliveries for construction projects, plant maintenance, and distribution across North America and international markets. SIP Industries is recognized for maintaining a vast and diverse inventory, which helps reduce lead times and ensures reliable availability. The company emphasizes product quality, compliance with engineering standards, and value-added services, such as customized packaging and global logistics support. Through decades of experience, SIP Industries has developed a strong reputation for reliability, technical support, and customer service in the industrial piping sector.

Please confirm if this is the correct company by replying with "1" or "SIP Industries Houston." Once confirmed, I will provide detailed company info and move to the next steps.

3s 7458t AI quality 5 View Run Info

If the name of 2 or more companies is exactly the same or if there is a discrepancy in the expected list of companies, the user can include the location as well, after the company name.

The case studies like the requirement, the prospect region and industry are displayed with the client's name, industry, solution delivered, and a link to the respective case study.



Smart Pitch Chat Shared

Case Studies - Similar Requirement (Integration + Power BI)

Client Name: OCS Services (India) Pvt Ltd

Location: India

Industry: Professional Services

Problem: Needed to replace their existing ERP and integrate with Line of Business (LOB) applications for streamlined business processes, including strong reporting and analytics.

Solution: Implemented Microsoft Dynamics 365 Finance & Supply Chain Management with integrated Power BI for analytics and reporting, resulting in improved process automation and actionable business insights.

Link: [Read Case Study](#) [96;2+source]

Client Name: Armexa

Location: North America

Industry: Professional Services (Cybersecurity)

Problem: Required operational streamlining and integration across Dynamics 365 Project Operations and Business Central, with unified reporting.

Solution: Deployed Dynamics 365 Project Operations & Business Central, integrated via Microsoft Azure, with Power BI dashboards for visibility across business performance metrics.

Link: [Read Case Study](#) [96;6+source]

Client Name: Hoover Ferguson

Location: North America

Industry: Manufacturing

Problem: Data was siloed in Dynamics NAV and Salesforce, leading to suboptimal business insight.

Solution: Robust integration using Scribe enabled seamless data flow between Dynamics NAV and Salesforce, improving visibility and reducing manual entry.

Link: [Read Case Study](#) [96;4+source]

Case Studies - Region (Europe)

Client Name: Rhizen Pharmaceuticals

Location: Switzerland/Europe

Industry: Manufacturing

Problem: Required a CRM with opportunity management, document management, Outlook and Office 365 integration.

Solution: Implemented Dynamics 365 Sales integrated with Office 365, boosting sales pipeline management and customer interaction.

Link: [Read Case Study](#) [96:8*source]

Client Name: Sonee Hardware

Location: Maldives (Proximity to European market and similar project scale)

Industry: Retail

Problem: Needed to automate and integrate various operations, including robust Power BI analytics across stores.

Solution: Deployed Dynamics 365 for Finance, Operations & Retail, and Power BI dashboards, enabling real-time data-driven decision-making.

Link: [Read Case Study](#) [96:9*source]

Client Name: Baglioni Resort

Location: Maldives/Europe (Chain with HQ in Italy)

Industry: Hospitality

Problem: Required centralized ERP, post-go-live support, and advanced reporting for finance team.

Solution: Microsoft Dynamics 365 Business Central with training for staff, improving reporting and compliance.

Link: [Read Case Study](#) [96:0*source]

Client Name: Baglioni Resort

Location: Maldives/Europe (Chain with HQ in Italy)

Industry: Hospitality

Problem: Required centralized ERP, post-go-live support, and advanced reporting for finance team.

Solution: Microsoft Dynamics 365 Business Central with training for staff, improving reporting and compliance.

Link: [Read Case Study](#) [96:0*source]

Case Studies - Industry (Professional Services/Consulting)

Client Name: OCS Services (India) Pvt Ltd

Location: India

Industry: Professional Services

Problem: See above (Requirement section).

Solution: See above (Requirement section).

Link: [Read Case Study](#) [96:2*source]

Client Name: Armexa

Location: North America

Industry: Professional Services

Problem: See above (Requirement section).

Solution: See above (Requirement section).

Link: [Read Case Study](#) [96:6*source]

Client Name: Kloudify Technologies

Location: Australia

Industry: Professional Services

Problem: Needed modern CRM and sales automation to streamline processes and increase sales effectiveness.

Solution: Implemented Dynamics 365 Sales QuickStart, enabling seamless lead management, opportunity tracking, and better client relationship management.

Link: [Read Case Study](#) [96:5*source]

Would you like to proceed to generate a PDF for this pitch?

11:16

yes provide the pdf





Smart Pitch 11:21



Hello!
You are in the Smart Pitch flow.
You'd like to generate the MQL-SQL PDF document again for your last submission. I will proceed with generating the PDF now.
Please wait a moment while I process your request.

Download File:

[Click here to download your MQL-SQL PDF](#)

If you need any further action or another PDF, please let me know!

Selecting the link would display the generated MQL-SQL Document in a new tab and download the same in pdf format.

Smart Pitch MQL-SQL

A: Inventory Optimization
B: Employee size is 51-200 employees, and revenue is Not publicly disclosed.

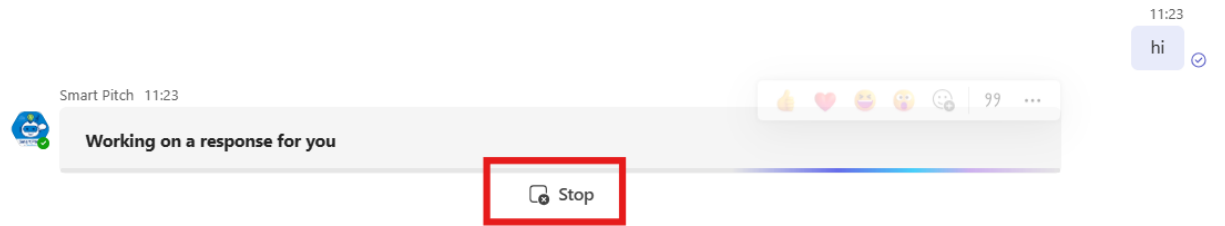
Company Details

Company Name	SIP Industries
Company Size	51-200 employees
Headquarters	Houston, United States
About Company	SIP Industries is a leading supplier of pipe, valves, and fittings for water and wastewater applications. The company specializes in providing high-quality infrastructure solutions to municipalities and contractors.
Company Website	http://www.sipindustries.com
Company LinkedIn	https://www.linkedin.com/company/sip-industries/
Revenue	Not publicly disclosed

Contact Person

Else if, the document isn't required or if certain data isn't found one could proceed to the other option "Thanks I am good for now" or simply end the conversation.

Further the conversation can be stopped any time by selecting stop during the processing of any conversation.




Inquiring on Case Studies, Organization and Opportunities

1] Case Study Search -

In case study search, one can search for the work/projects done by CloudFronts for the requirements of previous clients; one can ask directly based on the client's name or by providing in region, industry or requirement of the project or client.

By client name: -

List the various projects we have worked on with Tinius Olsen




Here are the various projects we have worked on with Tinius Olsen:


Client Name: Tinius Olsen
Location: Horsham, Pennsylvania, USA
Industry: Manufacturing (Testing Machines & Equipment)
Problem: Tinius Olsen required an upgrade from their legacy ERP to a modern solution to streamline their end-to-end discrete manufacturing operations and optimize critical business processes.
Solutions: CloudFronts partnered with Tinius Olsen for a full implementation of Microsoft Dynamics 365 Finance & Supply Chain Management (F&O/AX). The project covered migration of all core business functions including operations, inventory, procurement, project management, and financials to the Dynamics 365 modern platform. Power BI was also implemented for robust data analytics and reporting.
Detailed Description: The implementation helped Tinius Olsen achieve global operational visibility, optimized manufacturing workflows, and the ability to use advanced analytics for better business decisions.
Link: <https://www.cloudfronts.com/case-studies/tinius-olsen-d365-finance-supply-chain-management-implementation/>

If you need details on a specific project phase or solution module, let me know!

...



List the solution we have provided to Tarz distribution



Here is the solution we have provided to Tarz Distribution:


Client Name: Tarz Distribution
Location: UAE
Industry: Distribution
Problem: Tarz Distribution needed to streamline and automate their distribution and accounting processes, manage their inventory, financial KPIs, and improve overall business visibility for better decision-making.
Solutions:

- Implemented Microsoft Dynamics 365 Business Central to automate core processes related to purchasing, inventory, and financial management.
- Enabled real-time financial reporting to provide up-to-date business insights and KPI tracking.
- Achieved seamless business process management from procurement through to financial close, allowing for greater accuracy and efficiency across the company's operations.

Detailed Description:
CloudFronts partnered with Tarz Distribution to automate, unify, and streamline their entire distribution and financial operations using Microsoft Dynamics 365 Business Central. The implementation allowed Tarz Distribution to automate key tasks across purchasing, inventory management, and accounts, resulting in improved business decision-making and enhanced operational transparency.
Link: <https://www.cloudfronts.com/case-studies/tarz-distribution-dynamics-365-business-central-implementation/>

Let me know if you need any more details or case studies related to Tarz Distribution or similar projects!

...



By region: -

 **Smart Pitch** Chat Shared

11:32

Content Search

Smart Pitch 11:32



Hello!
You've selected Content Search.
Please tell me what questions or information you would like to find.
For example, you can ask for:

- Specific projects with a client
- Solutions provided for an industry
- Case studies in a particular region

Let me know your query, and I'll search for relevant content!

11:32

all the work we have done for various clients in maldives and india





Let me retrieve all the case studies and work done for clients in Maldives and India.

Searching for all projects and case studies for clients in Maldives and India...Here is a list of projects and case studies undertaken for clients in the Maldives and India:

Maldives

Client Name: Sonee Hardware

Location: Maldives

Industry: Retail

Problem: Needed robust ERP, HRMS, CRM, and analytics to manage multi-location stores, inventory, customer data, and employee records.

Solutions: Implemented Microsoft Dynamics 365 Finance, Operations, Retail, and HRMS along with Power BI analytics.

Detailed Description: CloudFronts enabled Sonee Hardware to manage their finances, operations, HR, and retail functions on a single platform. The solution automated sales processes, provided financial visibility, automated HR tasks, and delivered real-time analytics for business insights.

Link: [Read More](#) [12:4+source]

Client Name: Maldivian Gas Pvt Ltd

Location: Maldives

Industry: Manufacturing, Retail

Problem: Outdated ERP system and inefficiencies in core business processes.

Solutions: Migrated to Microsoft Dynamics 365 Business Central, integrated with existing HR, POS, and delivery systems.

Detailed Description: The solution provided unified management for accounting, finance, procurement, asset management, and more, leading to improved efficiency and real-time business insights.

Link: [Read More](#) [12:8+source]

Client Name: Hotel Care Unlimited

Location: Maldives

Industry: Hospitality

Problem: Needed an integrated ERP for hospitality, retail, inventory, and finance management.

Solutions: Implemented Dynamics 365 Business Central and LS Central for end-to-end business management.

Detailed Description: The all-in-one retail platform streamlined retail operations, centralized control, and improved inventory management for major hospitality services in the Maldives.

Link: [Read More](#) [12:9+source]

India

Client Name: Enrich Salon

Location: India

Industry: Professional Services

Problem: Inefficient Office 365 setup, scattered document management, and compliance issues.

Solutions: Realigned Microsoft Office 365, Exchange Online, and SharePoint Online for secure collaboration and compliance.

Detailed Description: The realignment resulted in better document management, compliance, email security, and collaboration across 60+ locations in India.

Link: [Read More](#) [12:6+source]

Client Name: Provectis Healthcare

Location: India

Industry: Pharmaceutical

Problem: Disconnected sales processes and lack of unified CRM.

Solutions: Dynamics 365 Sales QuickStart deployment for accounts, contacts, leads, and opportunities management.

Detailed Description: The deployment enabled comprehensive CRM functionalities, seamless collaboration, and tailored customer experiences for Provectis across its operations in India.

Link: [Read More](#) [12:7+source]


If you'd like information on additional projects in these countries or more details for any specific engagement, please let me know!

Would you like to continue?

By Requirement: -

13:06

list the companies we have worked with on Business Central ✓



Smart Pitch 13:06

Hello!

You have selected **Content Search**.

Please wait while I fetch information about the companies we have worked with on Business Central.

Let me search our case study knowledge base for relevant projects. Here is a list of companies we have worked with on Microsoft Dynamics 365 Business Central. Each company entry highlights the focus area and the project delivered.

Company Name: Baglioni Resort Maldives

Location: Maldives

Industry: Hospitality

Solutions Delivered: Dynamics 365 Business Central - Implementation support and user training, local taxation setup, financial process automation.

Detailed Information & Case Study: [Read More](#) [33:0+source]

Company Name: Armexa

Location: North America

Industry: Professional Services (Industrial Cybersecurity)

Solutions Delivered: Dynamics 365 Project Operations & Business Central - Services automation, comprehensive solution setup across lead management, project operations, business central modules, Azure integration, and Power BI enablement.

Detailed Information & Case Study: [Read More](#) [33:6+source]

Company Name: Demand Works

Location: North America

Industry: Professional Services

Solutions Delivered: Dynamics 365 Business Central - Data integration between Business Central and Demand Works Cloud Smoothie® solution using custom API.

Detailed Information & Case Study: [Read More](#) [33:10+source]

Company Name: Kloudify Technologies

Location: Australia

Industry: Professional Services / Retail

Solutions Delivered: Dynamics 365 Sales & Business Central - Optimizing sales processes, CRM and ERP integration.

Detailed Information & Case Study: [Read More](#) [33:5+source]

If you want a detailed breakdown of any specific project, or details on another company, let me know! Would you like more information on a particular project or company?

By industry: -



Here are case studies where we have implemented Power BI solutions for clients in the Manufacturing industry:

Client Name: OCS Services (India) Pvt Ltd

Location: India

Industry: Manufacturing / Oil & Gas, Marine Services

Problem: Needed an integrated solution across accounting, procurement, project management, and inventory, plus unified reporting and analytics.

Solutions: Implemented Dynamics 365 Finance & Supply Chain Management, integrated Line of Business (LOB) applications, and rolled out Power BI for comprehensive reporting & analytics to drive data-driven business decisions.

Detailed Description: Power BI delivered enhanced insights and value for operational, financial, and project data across the enterprise, supporting streamlined and robust business processes.

Link: <https://www.cloudfronts.com/case-studies/ocs-services-india-pvt-ltd-dynamics-365-finance-supply-chain-management-implementation/>

5. Troubleshooting & FAQs

Q: Why is the chatbot not responding correctly?

A: Try rephrasing the question or choose the correct alternative that would be prompted by SmartPitch.

Q: How often is the knowledge base updated?

A: Data from CRM is updated in real-time (If using Dataverse as a source)