



Microsoft Dynamics 365


Dynamics 365 CE Sales – RAPID IMPLEMENTATION




COMPUSOFT
THE WORLD OF SOFTWARE



Business Essentials have not Changed


**Rapid
Roll Out**


**Swift On
Boarding**



Sales Force Automation Expectations 

**Faster ROI
&
Scalability**





SALES

MARKETING

SERVICE

SOCIAL



**Define
Alert**

**Data
Migration**

**Define
Business
Unit**

**Email Router
Setup**

**Define User
Roles &
Hierarchy**

**Configure
Business
Process**



**Salesforce
Automation**

AUTO





**Lead
Nurturing**

**Account &
Contact
Management**

**Pricing,
Quote, Order,
and Invoice
Management**

**Opportunity
Management**

**Sales
Dashboard
/Reports**

**User & Role
Management**



**Salesforce
Automation**

AUTO





- Create or edit a lead
- Qualify a lead and convert it to an opportunity

- Create or edit an opportunity

- Create or edit an opportunity
- Create or edit a quote

- Create or edit an order
- Close an opportunity as won or lost

Once user determines that lead is interested in the solution ,qualify lead.
Qualifying a lead in Dynamics365 converts it to an opportunity.

In this stage, users identify stakeholders, competitors, and sales team members and come up with a proposed solution.

Now it's time for users to present their proposal to potential customer.

Proposal accepted or rejected? Closing an opportunity can include filling orders and sending follow-up messages.



Salesforce Automation

AUTO





Application Summary

Simple

Focus on the essential functions with a clear, consistent purpose that matches user intention.



Usable

Measure usability, incorporate feedback into designs.



Modern

Create delightful, engaging people and process centric experiences.



Fast

Design and deliver great perceived performance.



Loved

Design for Love.
Create experiences people want and simply can't live without.





Rapid Implementation Scope

- **Configuring Dynamics 365**

The configuration of Dynamics 365 for Small Business organization shall include the below mentioned following:

- Creation of organization theme with logo
- Defining system defaults for organization like fiscal year and currency
- Define single level Business Unit
- Defining Dynamics 365 users & up to 2 security roles
- Single design per object (Account, Contact, Lead /Opportunity)
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- Maximum 12 Field validation
- 25 Field creation or Modification across Entities
- Quote, Order and Invoice entities shall be standard out of box functionality (No Modifications)

- **Customer (Account/Contact) Data Import**

- Import Account and Contacts in Microsoft Dynamics 365, provided the data is available in supported formats and in the Dynamics 365 supported data import templates:
- Maximum 21000 records will be imported including Account, Contact, Lead, Opportunity, Products and 3 pricelists

- **Define Product & Price List**

- The out of box products and price list shall be configured into Dynamics 365

- **Define Business Process with existing set of fields in entity Leads/Opportunity**

- Business Processes will ensure that user enters data consistently and follow the same steps every time they work with a customer by creating a business process:
 - Qualify
 - Develop
 - Propose
 - Close

- **Define Alert**

- Workflows & Alerts up to maximum 3 shall be created.

- **Reports and Dashboards**

- Pivotal reports and out of box dashboards will be made available

- No Customization
- Customization would be done at additional cost
- No Integration with any other application
- Train the Trainer approach would be followed for training



enjoy...



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