



Predict4Dynamics

**Predictive Intelligence & Explainable AI Forecasting for
Dynamics 365 CRM using AI & ML**

Challenges



Limited Explainability in AI Predictions

Dynamics 365 CRM offers limited visibility into why a particular outcome was predicted. Users can see the top influencing factors but not the reasoning behind them, leading to uncertainty and a lack of trust in AI-driven insights



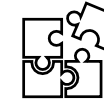
Complex Setup and Technical Barriers

Setting up and deploying predictive models in Dynamics 365 typically requires specialized data science expertise, complex configurations, and manual integration steps that slow down implementation



Dependency on Premium Licenses and AI Builder Credits

Existing predictive features often rely on AI Builder credits or premium Dynamics 365 licenses, which can significantly increase operational costs and limit access for organizations with standard licensing



Limited Flexibility Across Entities and Scenarios

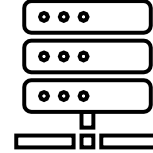
Traditional CRM predictive tools are often restricted to a few entities like Leads or Opportunities, limiting their usefulness for broader business scenarios such as service, projects, or custom modules.

Need for Predict4Dynamics



High-volume CRM data ingestion

CRM teams often work with large datasets where traditional rule-based processes fall short



Deep data analysis requirements

Modern prediction scenarios require analyzing thousands of rows across multiple tables



50% faster decisions with automated predictions

AI-driven forecasting reduces manual analysis time by up to 50%, enabling sales, service, and operations teams to act proactively with instant, data-backed insights

AI-Driven Predictions with High Accuracy

Reliable, Transparent, and Explainable Forecasting



Actionable Insights for improved decision-making



Customizable models to improve segmented decision-making

Key Features

Ready-to-Use Sample Models for Leads and Opportunities

Comes with ready-to-use AI models for key CRM entities, enabling instant predictive insights without complex setup.



Seamless Prediction Automation & Triggers

Automatically generates predictions whenever records are created or updated, ensuring real-time insights



Extensive Coverage for OOB and Custom Entities

Allows creation of prediction models for both out-of-the-box and custom entities to suit unique business needs.



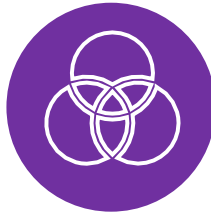
Model Customization

Lets administrators fine-tune AI models by selecting relevant data columns and applying filters aligned with business logic



Leveraging Multiple Predictive Models for each Entity

Supports multiple AI models for a single entity, enabling segment-based or experimental predictions



Configurable Prompt Templates for Insightful Explanations

Allows admins to define custom prompts to control the tone, depth, and style of AI-generated explanations.



Explainable AI with Azure OpenAI

Provides clear, human-understandable explanations for every prediction to enhance trust and interpretability.



Scalable and Secure Tenant Isolation Framework

Ensures full data privacy and compliance by keeping all AI and ML resources within the customer's Azure environment



Available for

Supported Versions

Dynamics 365 v9.1 and above

Microsoft Dataverse



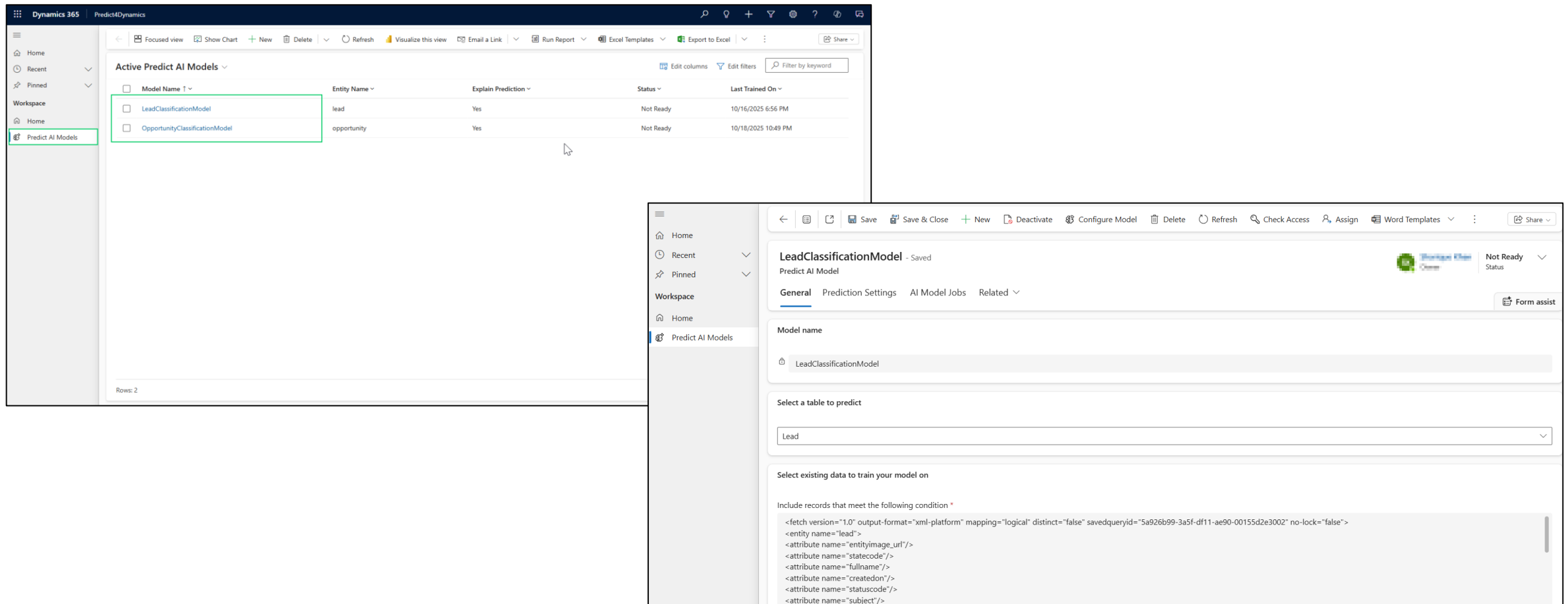
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DYNAMICS 365 ONLINE

Deployments

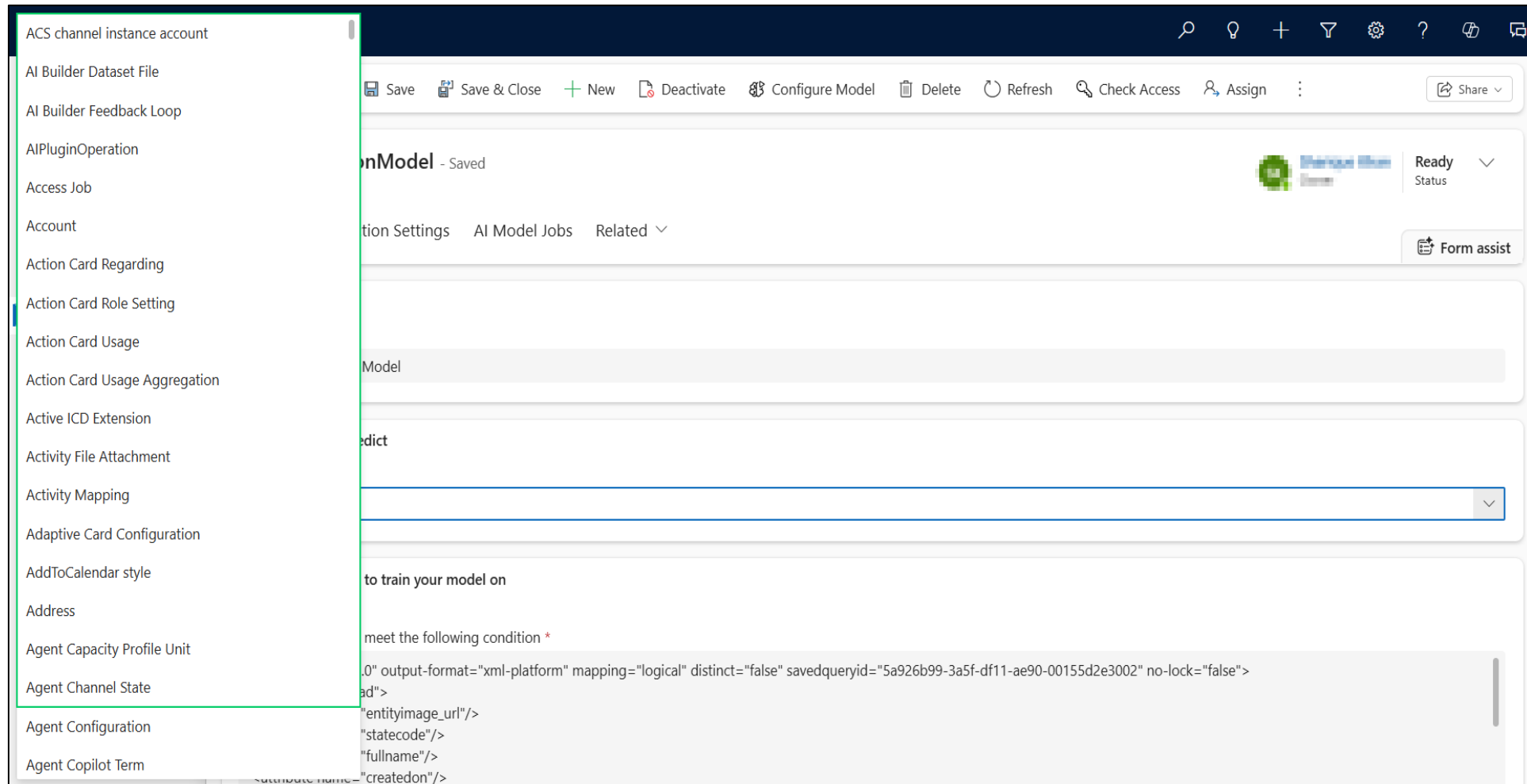
Ready-to-Use Sample Models for Leads and Opportunities

Comes preloaded with trained AI models for key entities, allowing businesses to instantly forecast lead conversions, opportunity wins, and sales outcomes. It minimizes setup time and helps users quickly harness predictive insights without data science expertise.



Extensive Coverage for OOB and Custom Entities

Provides you flexibility to use standard CRM entities or tailor-made modules, enables predictive analytics across all. This flexibility ensures every business process—from sales to service—is empowered with actionable AI-driven insights.



Leveraging Multiple Predictive Models for each Entity

Create multiple AI models for the same entity (e.g., separate models for different lead types or segments). This feature supports experimentation and fine-tuning, helping teams identify the best-performing models for their data.

Dynamics 365

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Predict AI Models

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Focused view

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Email a Link

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Excel Templates

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Active Predict AI Models

Edit columns

Edit filters

Filter by keyword

☐	Model Name ↑	Entity Name ↓	Explain Prediction ↓	Status ↓	Last Trained On ↓
☐	LeadClassificationModel	lead	Yes	Ready	10/16/2025 6:56 PM
☐	LeadPredictionModel	lead	No	Not Ready	
☐	OpportunityClassificationModel	opportunity	Yes	Ready	10/18/2025 10:49 PM

Select existing data to train your model on

Include records that meet the following condition *

<fetch version="1.0" output-format="xml-platform" mapping="logical" distinct="false" savedqueryid="5a926b99-3a5f-df11-ae90-00155d2e3002" no-lock="false">
<entity name="lead">
<attribute name="entityimage_url"/>
<attribute name="statecode"/>
<attribute name="fullname"/>
<attribute name="createdon"/>
<attribute name="statuscode"/>
<attribute name="subject"/>
</entity>
</fetch>

Select columns that influence the prediction

Preferred Method of Contact, Rating, Topic, Annual Revenue, Industry, Job Title, Lead Source, No. of Employees

Select a column to predict

Status

Seamless Prediction Automation & Triggers

Predict4Dynamics automatically triggers predictions whenever CRM data changes—no manual action required. This ensures users always have the most up-to-date insights for faster, more accurate decision-making.

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Predict AI Models

LeadClassificationModel - Unsaved

Predict AI Model

General Prediction Settings AI Model Jobs Related

Drop files or smart paste for Copilot to make suggestions

Prediction trigger on

Create and update

Create

Update

✓ Create and update

Explain prediction

Yes

Custom Instructions

Display prediction on form

Information

OpenAI settings

Model Name

gpt-model

API Version

2025-01-01-preview

Prediction explainability settings

Explain Prediction

Yes

Custom Instructions

Give a detailed answer in plain text format with proper line breaks.

Formatting rules:

1. Use clear section headers in uppercase, for example:

PREDICTION SUMMARY:

FINAL CONCLUSION:

POSITIVE FACTORS:

Model Customization

Administrators can modify predefined models by selecting relevant data columns, applying filters, and defining rules. This makes predictions more precise and aligned with your organization’s operational logic.

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Predict AI Models

LeadClassificationModel - Saved

Predict AI Model

General

Prediction Settings

AI Model Jobs

Related

Lead

Ready Status

Form assist

Select existing data to train your model on

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Select columns that influence the prediction

Preferred Method of Contact, Rating, Topic, Annual Revenue, Currency, Customer, Industry, Job Title, Lead Source, No. of Employees

Select a column to predict

Status

Explainable AI with Azure OpenAI

Using Azure OpenAI, Predict4Dynamics provides detailed, contextual reasoning for each prediction. This transparency enhances trust, interpretability, and confidence in AI-driven insights across business teams.

LeadClassificationModel - Saved

Predict AI Model

General Prediction Settings AI Model Jobs Related

Prediction trigger on

Create and update

Prediction explainability settings

Explain Prediction

Yes

Custom Instructions

Display prediction on form

Lead

OpenAI settings

Model Name

gpt-model

API Version

2025-01-01-preview

Summary

Lead interested in Trial account setup, created on 10/17/2025, holding System Administrator position... Last Refresh: 05:43 pm

See full summary

John Thomas - Saved

Lead - Lead

Partner Lead Source Cold Rating New Status

Lead to Opportunity Sales - Active for 13 days

Qualify (13 D) Develop Propose Close

Summary Details Files Related

Form assist

Contact

Topic Interested in Trial account setup

First Name John

Last Name Thomas

Job Title System Administrator

Business Phone

Mobile Phone

Email

Company

Up next

Manage your activities

See upcoming activities by creating an activity. Learn more

Create activity

Timeline

Search timeline

Enter a note...

Get started

Predict4Dynamics

Score

83.02

Prediction Summary

PREDICTION SUMMARY:

The lead is predicted to be "Qualified" with a high probability of success.

FINAL CONCLUSION:

POSITIVE FACTORS:

The revenue generated by the lead is a strong positive driver, indicating financial stability and potential for investment.

The source of the lead, coming from a partner, suggests a reliable and potentially pre-vetted interest.

The job title of 'System Administrator' implies a decision-making role within the company which could influence a positive outcome.

NEGATIVE FACTORS:

The lead quality being labeled as 'Cold' suggests a lower initial interest or engagement from the lead.

The preferred contact method being 'Phone' might indicate limitations in communication preferences or responsiveness.

OVERALL IMPACT:

The combination of a substantial revenue and a reputable lead source strongly supports the qualification of the lead. Despite the lead's initial cold status and specific contact preference, the financial stability and the strategic position of the lead within their company (System Administrator) have a more significant positive impact on the lead's qualification status. This synergy of factors leads to the high probability of the lead being qualified.

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Configurable Prompt Templates for Insightful Explanations

Administrators can define custom prompts to guide Azure OpenAI in creating explanations—adjusting tone, depth, and structure. This gives organizations control over how AI communicates predictive insights.

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- The revenue generated by the lead is a strong positive driver.
- The source of the lead, coming from a partner, significantly boosts its qualification status.
- The job title of 'System Administrator' positively influences the lead's qualification.

NEGATIVE FACTORS:

- The lead quality being labeled as 'Cold' slightly detracts from its potential.
- The preferred contact method being 'Phone' also negatively impacts the lead's score.

FINAL CONCLUSION:

The lead's high potential revenue and beneficial source from a partner are the primary reasons for its qualification as a strong lead. These factors suggest a high level of engagement and possible readiness for conversion. Although there are some concerns due to the lead's cold quality and preference for phone contact, these are not enough to significantly overshadow the positive attributes. The job title of 'System Administrator' further supports the lead's capability and relevance in potentially utilizing our services effectively.

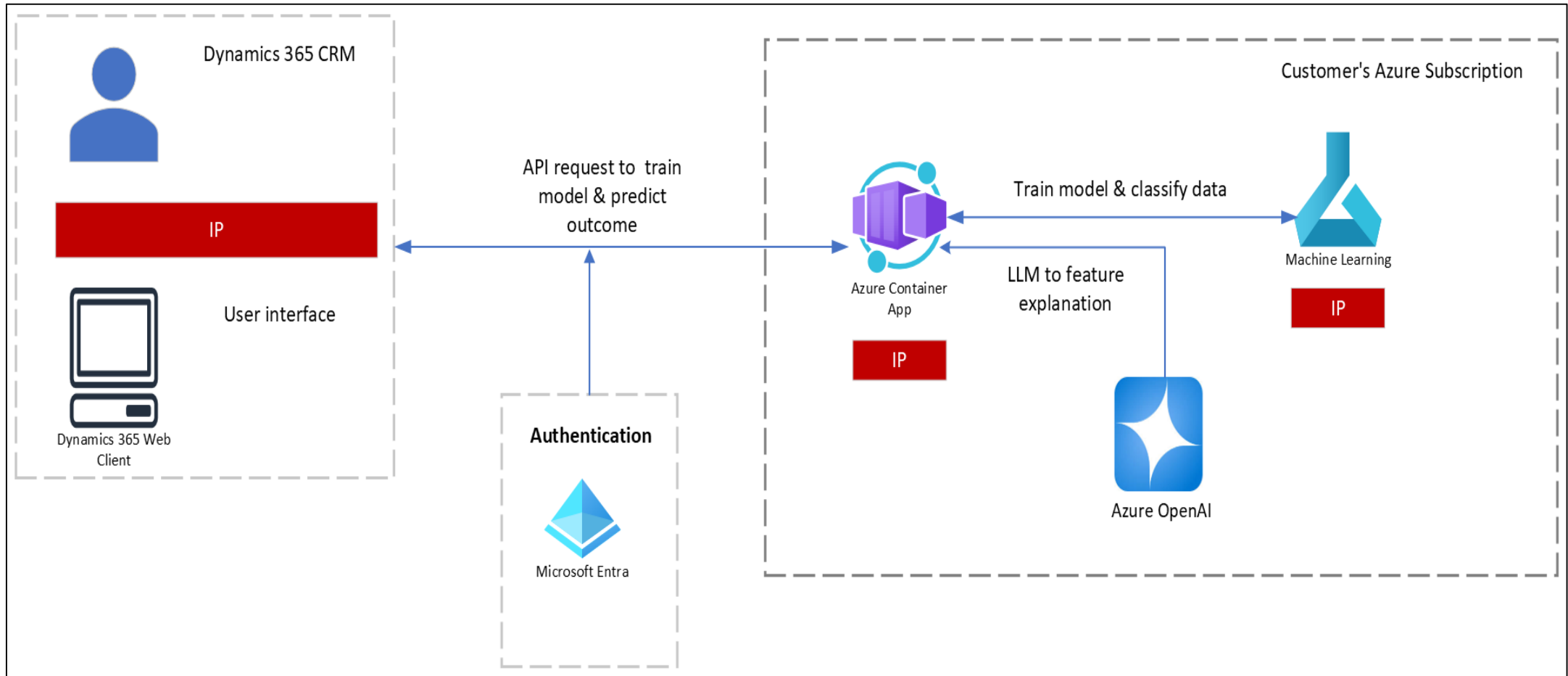
NEXT BEST ACTION:

Engage the lead with a tailored communication that highlights the benefits of our services, particularly emphasizing aspects relevant to system administration. Address any reservations they might have due to the cold lead status by reassuring the value and support we offer.

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Scalable and Secure Tenant Isolation Framework

Predict4Dynamics ensures complete data privacy by hosting all AI, ML, and OpenAI resources securely within your tenant. No data leaves your environment, maintaining compliance and confidentiality standards.



Easy Configuration and Deployment

The solution offers a simple, intuitive configuration interface with preconfigured Azure applications. This enables fast deployment and quick onboarding—no coding, minimal setup, and maximum productivity from day one.

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LeadClassificationModel - Saved

Predict AI Model

Ready Status

General

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Select a column to predict

Status

What's next

Get Started

In just 10 minutes!

Learn more about Predict4Dynamics

Contact us to get your Predict4Dynamics app from our website or Microsoft AppSource

Email: [crm@Inogic.com](mailto:crm@inogic.com)

Why Us?



Quality Products

Ability to deliver quality solutions quickly and at affordable prices.



Latest Technology

Our apps are aligned to Microsoft release cycle, and we make use of the latest and greatest technology available at any point.



Partner and Customer led Product Roadmap

We proactively seek inputs from our partners and customers and design our product roadmap based on these.



Customer Service

Our panel of product experts with vast industrial knowledge is quick to provide supportive solutions to any impromptu requests.



Community Driven

We believe in community growth along with business growth and hence engage in several employee training and engagement programs.

Thank You!

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