



Predict4Dynamics

inogic

User Manual

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Introduction

Predict4Dynamics: Predictive Intelligence & Explainable AI Forecasting for Dynamics 365 CRM using AI & ML

Predict4Dynamics redefines how organizations capitalize data within Microsoft Dynamics 365 CRM by seamlessly integrating sophisticated machine learning-based predictive analytics into your existing CRM platform. Rather than relying solely on historical reports or manual analysis, it enables you to forecast sales, service, and operational outcomes with actionable precision—helping you make proactive decisions that drive business growth.

With Predict4Dynamics, you can instantly identify high-value leads, anticipate revenue trends, predict customer churn, and optimize field service and project operations. By leveraging a combination of ready-to-use sample models, explainable AI, and seamless integration with Dynamics 365, the solution provides contextual, real-time predictions that are easy to interpret and act upon—without requiring complex setup.

This predictive framework supports a wide range of scenarios:

- **Sales:** Predict lead conversion rates, opportunity wins, and revenue trends to focus efforts on the most promising prospects.
- **Customer Service:** Anticipate case resolution times, and reduce churn to enhance satisfaction and loyalty.
- **Field Service:** Enable predictive maintenance, optimize resource allocation, and forecast demand to minimize downtime and operational costs.
- **Project Operations:** Forecast project costs, timelines, and risks for better planning, delivery, and profitability.

By providing transparent, human-understandable explanations for every prediction, Predict4Dynamics bridges the trust gap in AI-driven insights, empowering CRM users to make confident decisions backed by data. Its tenant-isolated architecture ensures complete security and compliance, keeping your data within your organization's environment.

Silent Features

- **Predefined Models for Leads and Opportunities:** Ready-to-use sample models for common CRM entities, quickly trainable on your own organizational data.
- **Extensive Coverage for OOB and Custom Entities:** Extend predictive insights across out-of-the-box and custom CRM entities.
- **Leveraging Multiple Predictive Models for each Entity:** Segment-specific predictions or experiment with multiple models for the same entity.
- **Seamless Prediction Automation & Triggers:** Real-time predictions whenever records are created or updated.
- **Model Customization:** Tailor models using relevant data columns and business-specific filters.
- **Explainable AI with Azure OpenAI:** Human-understandable reasoning for each prediction.
- **Configurable Prompt Templates for Insightful Explanations:** Control the tone, depth, and format of AI-generated explanations.
- **Scalable and Secure Tenant Isolation Framework:** All AI and ML resources reside within your environment.

- **Easy Configuration and Deployment:** Intuitive UI for effortless model setup and management.

Predict4Dynamics empowers Dynamics 365 CRM users with a smarter, actionable approach to data—turning insights into strategic decisions. By combining predictive power, explainable AI, and seamless integration, it transforms everyday CRM tasks into forward-looking, AI-driven business outcomes.

Available for: Dynamics 365 CRM, Power Apps, and the Microsoft 365 ecosystem

Deployment: Online, secure, and fully tenant-isolated

Prerequisites

Installation of InoWiz Prediction Builder

InoWiz Prediction Builder is a powerful Azure-based application designed to simplify and accelerate predictive analytics for business users. It installs directly into the customer's Azure subscription and automatically provisions all required resources with pre-configured settings, enabling users to start building and consuming machine learning models without needing deep technical expertise.

Why You Need It?

To download/get all the resources required by the Predict4Dynamics app for prediction and train the model on business data

[Active Microsoft Azure subscription](#). (Required to download and deploy the InoWiz Prediction Builder Azure application.)

Get the [InoWiz Prediction Builder app](#).

Installation

Installation of Predict4Dynamics

To get the Predict4Dynamics application:

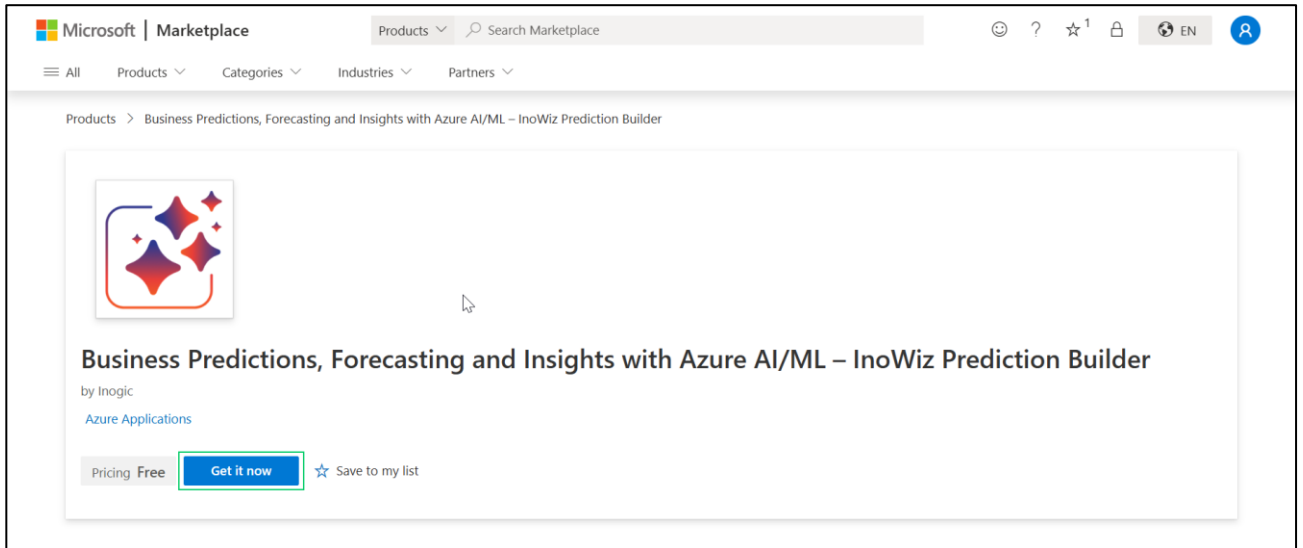
1. Go to Microsoft Marketplace.
2. Click on **Contact me**.
3. Fill the necessary details and raise the request.

Installation of InoWiz Prediction Builder

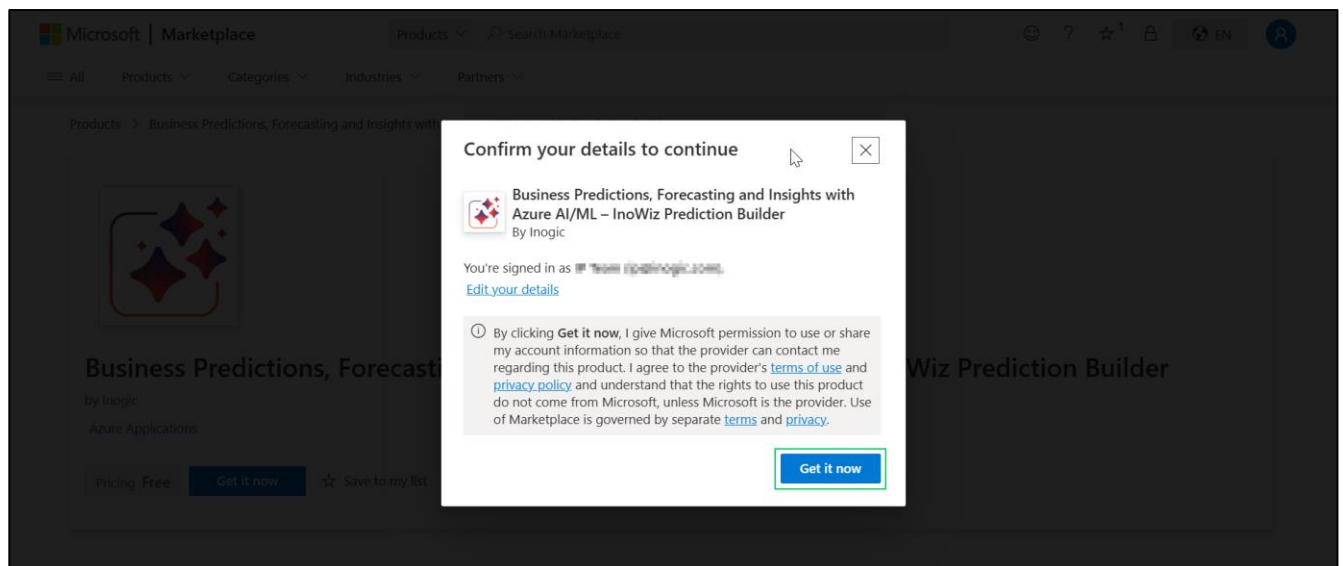
To get the InoWiz Prediction Builder application, go to Microsoft Marketplace.

Download the InoWiz Prediction Builder (Azure Managed Application)

- Once you click on Install, it will navigate you to the InoWiz Prediction Builder page. Click **Get it now** to begin the deployment process.

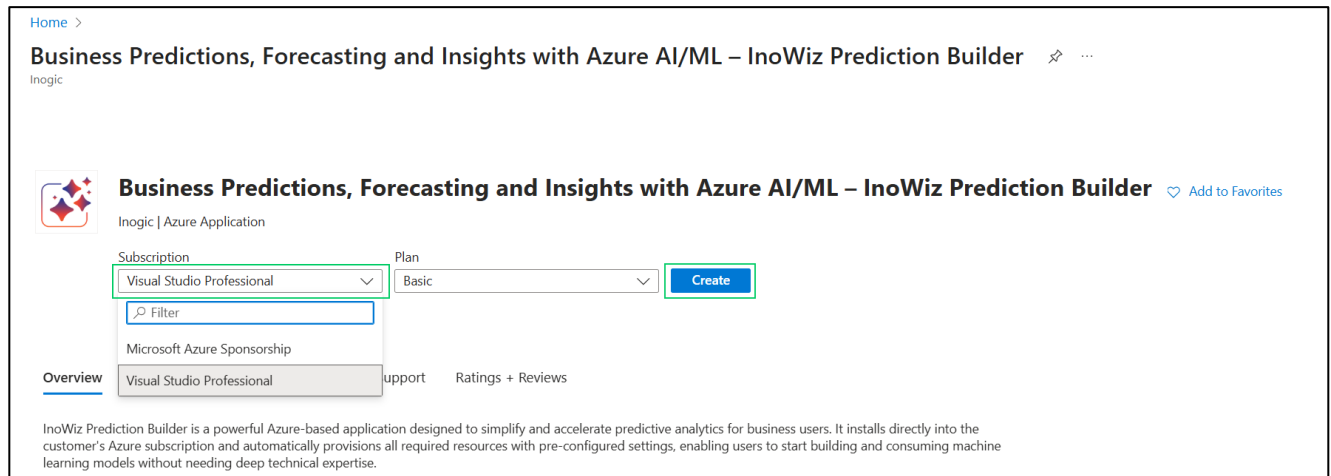


- A confirmation prompt appears — click **Get it now** again to confirm.



Select Subscription and Create

- Select your **active Azure subscription** from the subscription dropdown. (You must have an active subscription to proceed.)
- Click **Create** to continue to the deployment configuration UI.



Basics Tab — Resource Group & Names

- **Create a new Resource Group OR select an existing Resource Group.**
 - **Important:** If you select an existing resource group, it **must be empty**. If it contains resources, create a new resource group instead.
- Enter the **Container App name** and **Managed Application name**.
 - **Note:** The **Container App name** will appear in the URL of the created container app — choose it carefully.

[Home](#) > [Business Predictions, Forecasting and Insights with Azure AI/ML – InoWiz Prediction Builder](#) >

Create Basic

Basics OpenAI Service Configuration Tags Review + create

Deploy a complete Azure ML workspace with Container App for your machine learning applications. This managed application includes all necessary components: ML workspace, Container App, Storage, Key Vault, Application Insights, and Log Analytics Workspace.

Project details

Select the subscription to manage deployed resources and costs. Use resource groups like folders to organize and manage all your resources.

Subscription * ⓘ Visual Studio Professional

Resource group * ⓘ sample-rg
[Create new](#)

Instance details

Region * ⓘ East US

Container App Name * ⓘ sample-container-app ✓

Managed Application Details

Provide a name for your managed application, and its managed resource group. Your application's managed resource group holds all the resources that are required by the managed application which the consumer has limited access to.

Application Name * ContosoPredictionApp ✓

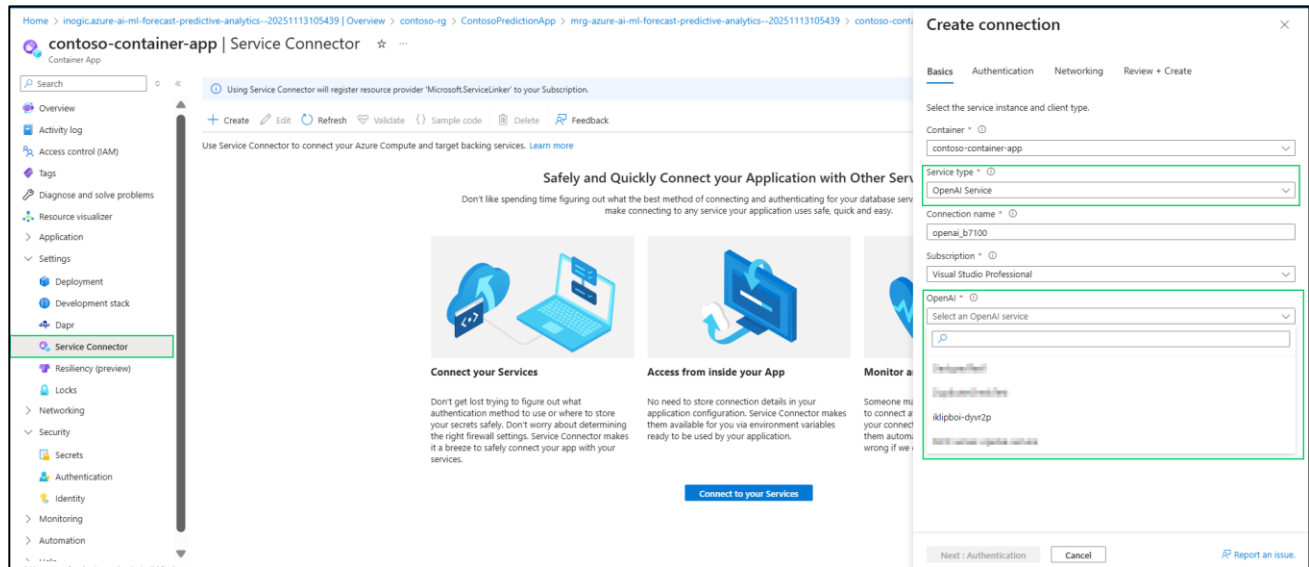
Managed Resource Group * ⓘ mrg-azure-ai-ml-forecast-predictive-analytics--20251113105439 ✓

[Previous](#) [Next](#) [Review + create](#)

OpenAI Service Configuration Tab

- Move to the **Open AI service configuration** tab. You will be prompted to choose an option (Yes / No).
 - If you select **Yes**:
 - Assuming you already have an existing Azure OpenAI service with the deployed model
(Note the model should be of type chat completion)
 - After successful deployment of the InoWiz Prediction Builder, open the container apps.
 - Go to the **Settings > Service Connector**, click on **create in the Basics** tab > and keep the container the default selected one.
 - Service type select OpenAI service keeps the connection name as is don't make any changes there
 - In the OpenAI dropdown, all your existing Azure OpenAI services will be listed. If you have an existing service, it will appear in that drop-down, so select it from there.

Predict4Dynamics – User Manual



After that, select the client type as Python, then click next.

Create connection

×

Basics

Authentication

Networking

Review + Create

Select the service instance and client type.

Container * ⓘ

contoso-container-app

▼

Service type * ⓘ

OpenAI Service

▼

Connection name * ⓘ

openai_b7100

Subscription * ⓘ

Visual Studio Professional

▼

OpenAI * ⓘ

iklipboi-dyvr2p

▼

Create new

Client type * ⓘ

Python

▼

Next : Authentication

Cancel


[Report an issue.](#)

Keep default settings for the Authentication & Networking tab.

In the **Review + Create** tab, check all the filled details and settings, and click on the create button. This will deploy the existing Azure OpenAI service to the container app.

Create connection

Basics

Authentication

Networking

Review + Create

Validation passed.

Details

Connection name	openai_b7100
Subscription	Visual Studio Professional
Client type	Python
Container	sample-container-app
Service type	OpenAI Service
OpenAI/Cognitive Services	iklipboi-igcq7

Authentication

System assigned managed identity	Selected
RBAC roles	Cognitive Services OpenAI Contributor (Default)

Networking

Network solution	Firewall rules of the OpenAI will be configured to allow access from the ContainerApp.
------------------	--

Create

Previous

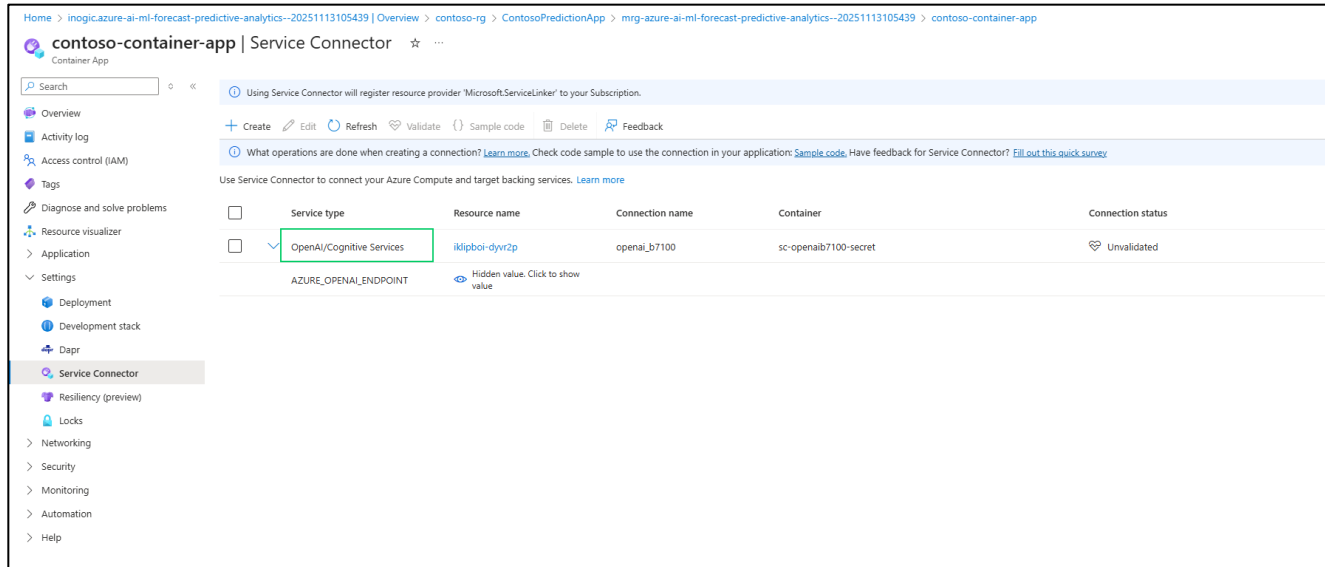
Cancel

Download a template for automation

After successful deployment, the Azure OpenAI service is now shown in the container apps **Settings > Service Connector**.

Now, with this connection, the container app can connect to the Azure OpenAI service.

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If you select **No**:

- The InoWiz Prediction Builder will **create an Azure AI service** for you and **deploy the model** into that service automatically.
- From the dropdown, **select the model** you want to deploy and **select/set the token** for that model.
- Set the **token value** based on your requirements and the tokens available in your Azure subscription. (Ensure you have sufficient tokens/quota for the chosen model.)
- Click **Next** to proceed.

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Create Basic ...

Basics

OpenAI Service Configuration

Tags

Review + create

Configure Azure OpenAI service for your application. You can either use an existing OpenAI service or create a new one with model deployments.

Use existing OpenAI service? *

Yes - Use existing OpenAI service

No - Create new OpenAI service

New OpenAI Service Configuration

OpenAI Service Tier *

Standard (S0)

Note: Model deployments will be created automatically. You can modify these in Azure AI Foundry after deployment for advanced configurations.

Primary GPT Model to Deploy *

GPT-4 (Chat completions)

GPT-4 (Chat completions)

GPT-4-turbo (Chat completions)

GPT-5-mini (Chat completions)

Default Model Capacity (TPM) *

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Review + create

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Create Basic

Basics **OpenAI Service Configuration** Tags Review + create

i Configure Azure OpenAI service for your application. You can either use an existing OpenAI service or create a new one with model deployments.

Use existing OpenAI service? * ⓘ ☐ Yes - Use existing OpenAI service ☒ No - Create new OpenAI service

New OpenAI Service Configuration

OpenAI Service Tier * ⓘ Standard (S0) ▼

⚠ Note: Model deployments will be created automatically. You can modify these in Azure AI Foundry after deployment for advanced configurations.

Primary GPT Model to Deploy * ⓘ GPT-4 (Chat completions) ▼

Default Model Capacity (TPM) * ⓘ

10K TPM ▼

10K TPM

30K TPM

60K TPM

120K TPM

Previous Next Review + create

Keep the default settings for the **Tags** section and click on **Next**.

Finalize Deployment

- Review all configuration selections (subscription, resource group, container app name, OpenAI configuration, model and token, environment, owner).
- Complete the deployment (click **Create** / **Deploy** as applicable in the Azure UI).

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Create Basic ...

Basics OpenAI Service Configuration Tags **Review + create**

 [View automation template](#)

Price

Business Predictions, Forecasting and Insights with Azure AI/ML – InoWiz Prediction Builder
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Not covered by credits ⓘ

Free

TERMS

By clicking "Create", I (a) agree to the legal terms and privacy statement(s) associated with the Marketplace offering(s) listed above; (b) authorize Microsoft to bill my current payment method for the fees associated with the offering(s), with the same billing frequency as my Azure subscription; and (c) agree that Microsoft may share my contact, usage and transactional information with the provider(s) of the offering(s) for support, billing and other transactional activities. Microsoft does not provide rights for third-party offerings. See the [Azure Marketplace Terms](#) for additional details.

Name	John Doe
Preferred e-mail address	john.doe@contoso.com
Preferred phone number	(408) 555-1234

[Home](#) > [Business Predictions, Forecasting and Insights with Azure AI/ML – InoWiz Prediction Builder](#) >

Create Basic ...

Co-Admin Access Permission

By checking the box and clicking "Create" I give permission for the template provider referenced above (the "Provider") to have Administrative-level access to one or more Azure resources in order to provide support and management services for the template. In the event of an issue arising from a Provider's services or failure to provide services, your sole recourse is with the Provider. Unless Microsoft is the Provider, Microsoft (i) does not approve, monitor or manage the Provider's access, and (ii) bears no responsibility whatsoever for acts or omissions of a Provider.

☒ I agree to the terms and conditions above. *

Basics

Subscription	Visual Studio Professional
Resource group	contoso-rg
Region	East US
Container App Name	contoso-container-app
Application Name	ContosoPredictionApp
Managed Resource Group Name	mrg-azure-ai-ml-forecast-predictive-analytics--20251113105439

OpenAI Service Configuration

Use existing OpenAI service?	No - Create new OpenAI service
OpenAI Service Tier	Standard (S0)
Primary GPT Model to Deploy	GPT-4 (Chat completions)
Default Model Capacity (TPM)	10K TPM

Tags

Environment Tag	Production
Owner Tag	-

[Previous](#)

[Next](#)

[Create](#)

This will create a managed application in the selected Azure subscription. After successful deployment user must open the managed application.

Home >

inogic.azure-ai-ml-forecast-predictive-analytics--20251113105439 | Overview

Deployment

Search

Delete Cancel Redeploy Download Refresh

Overview

Inputs

Outputs

Template

✓ Your deployment is complete

Deployment name : inogic.azure-ai-ml-forecast-predictive-analytics--20251113105439

Subscription : Visual Studio Professional

Resource group : contoso-rg

Start time : 13/11/2025, 11:04:45

Correlation ID : 38791875-9300-46bd-9519-7a2d04ec910d

Deployment details

Resource	Type	Status	Operation details
✓ ContosoPredictionApp	Managed application	OK	Operation details

Next steps

Go to resource

Give feedback

Tell us about your experience with deployment

Click here to configure the InoWiz Prediction builder.

Configuration

Configure InoWiz Prediction Builder

After successful deployment, open the Managed Application

Create Manage view Delete resource group Refresh Export to CSV Open query Assign tags Move Delete Export template Open in mobile

Essentials

Subscription (move) : Visual Studio Professional

Subscriptions ID : 7b7b7b7b-7b7b-7b7b-7b7b-7b7b7b7b7b7b

Tags (edit) : Add tags

Deployments : 1 Succeeded

Location : East US

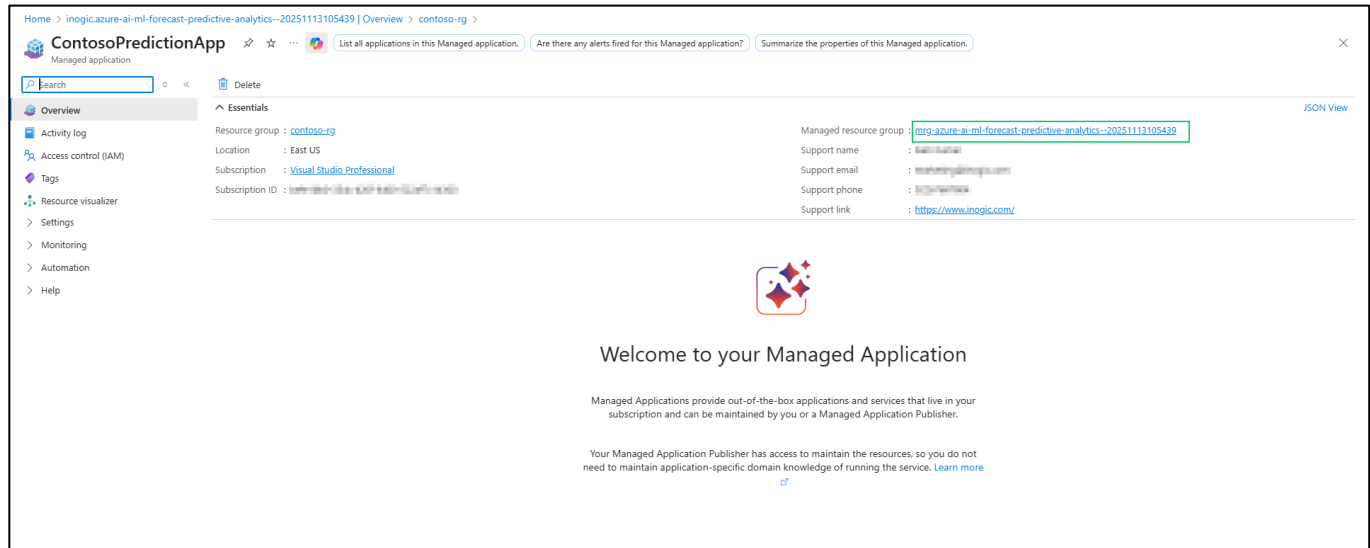
Resources Recommendations

Filter for any field... Type equals all Location equals all Add filter

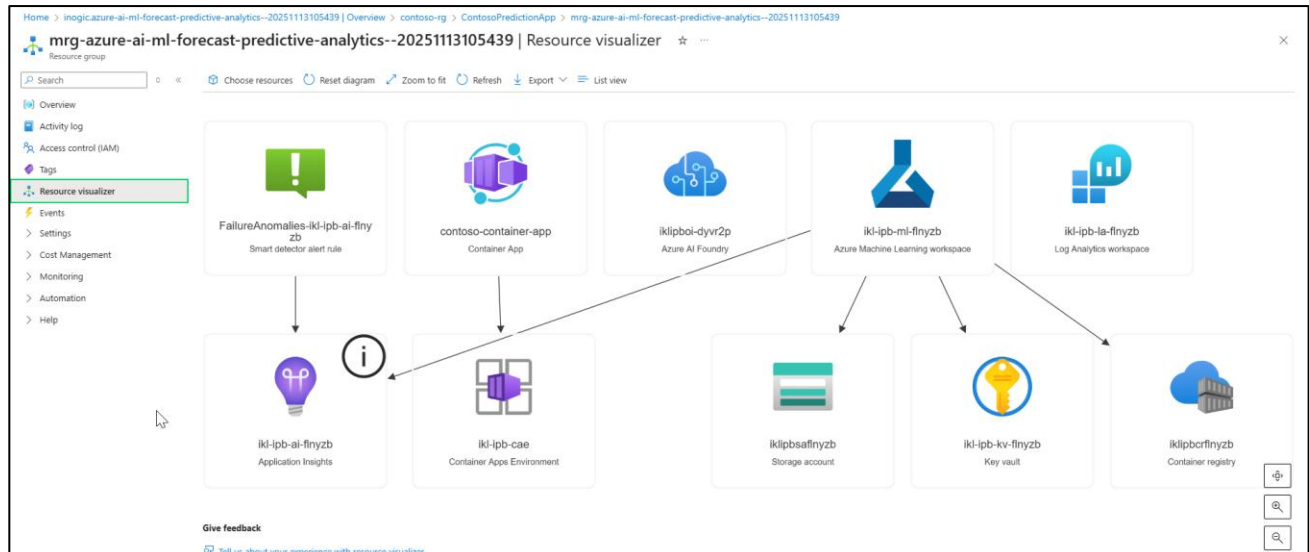
Name ↑	Type	Location
ContosoPredictionApp	Managed application	East US

Open the Managed Resource Group

- Inside the managed application, go to the **Managed Resource Group**. This resource group contains all the resources that were created by the managed application.



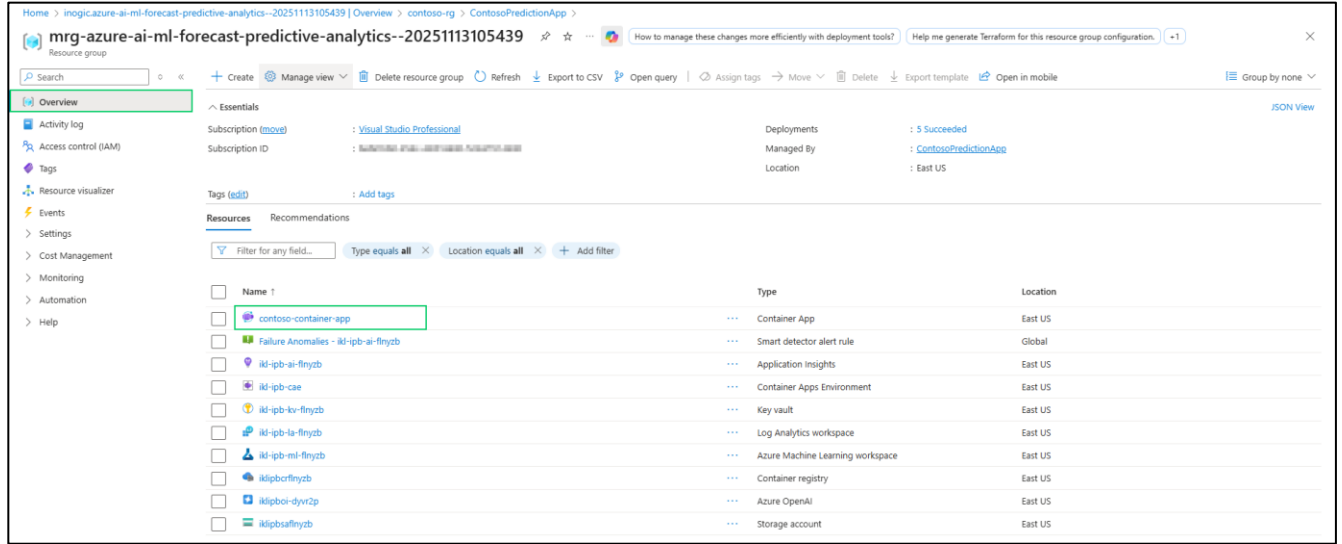
- On the managed resource group overview, you can:
 - View all created resources directly, or
 - Click **Resource Visualizer** to get a visual map of the created resources.



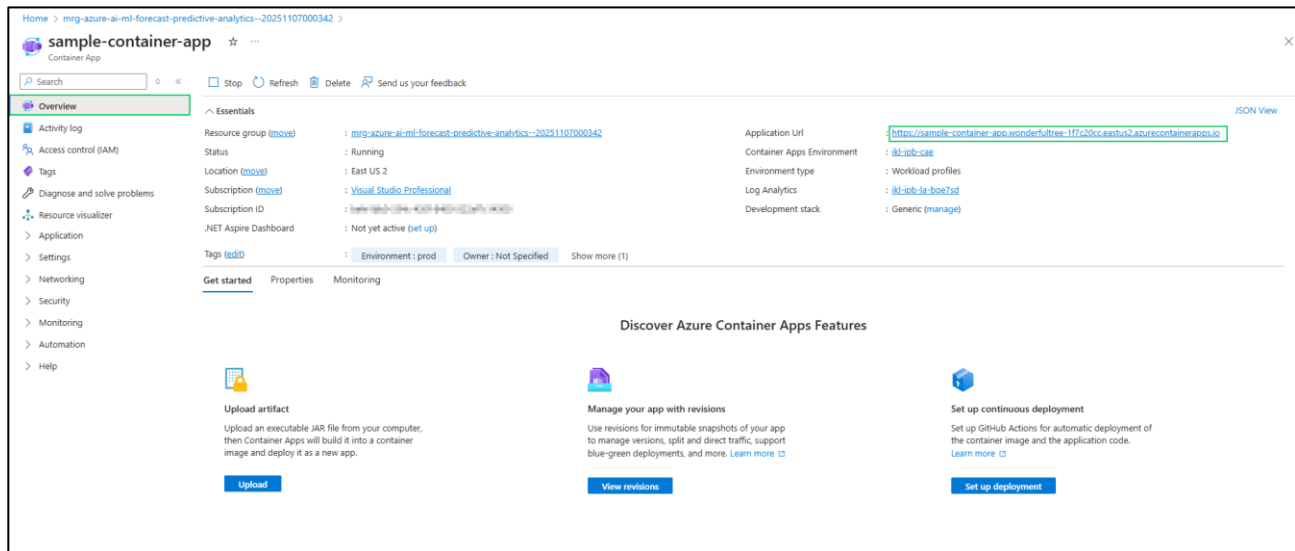
Locate the Container App and Copy the Endpoint URL

From the list of resources, open the **Container App** (example name: sample-container-app).

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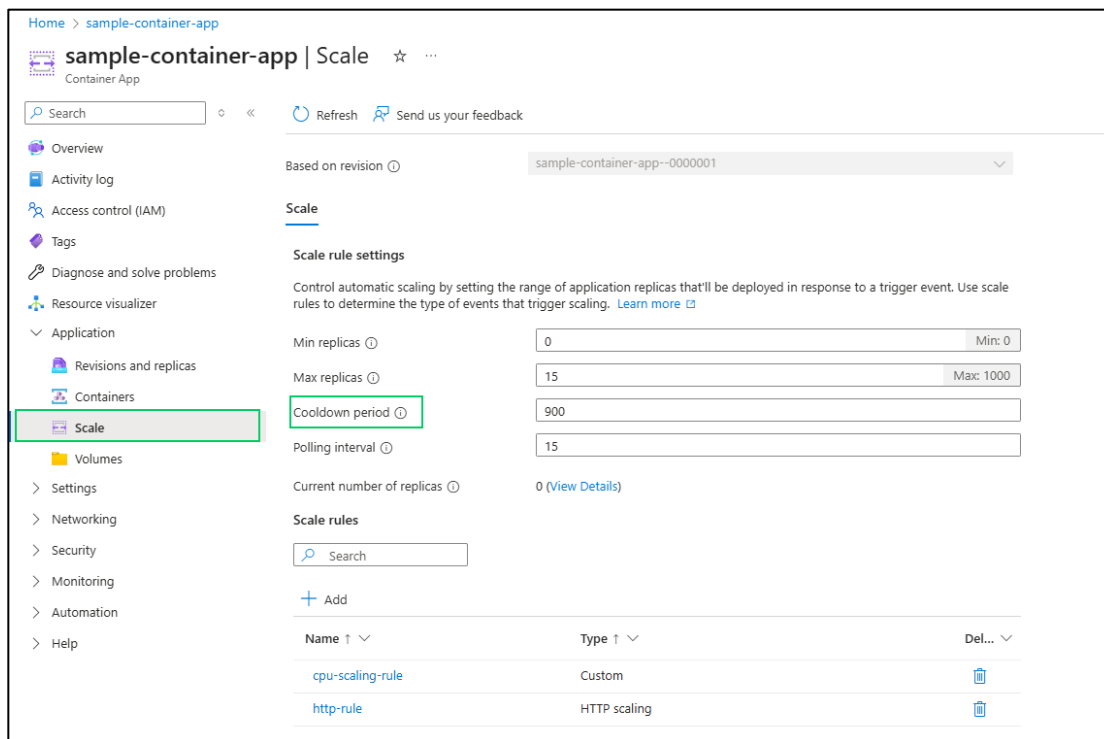
Inside the Container App, copy the **Application URL** — this is the **endpoint URL** that you will use on the Predict4Dynamics home page to connect the app to the container. **Save this URL** for later.



Note: The Container App URL contains the container app name you set during deployment; choose that name carefully earlier.

Container App: Cool-Down Period (Optional Adjustment)

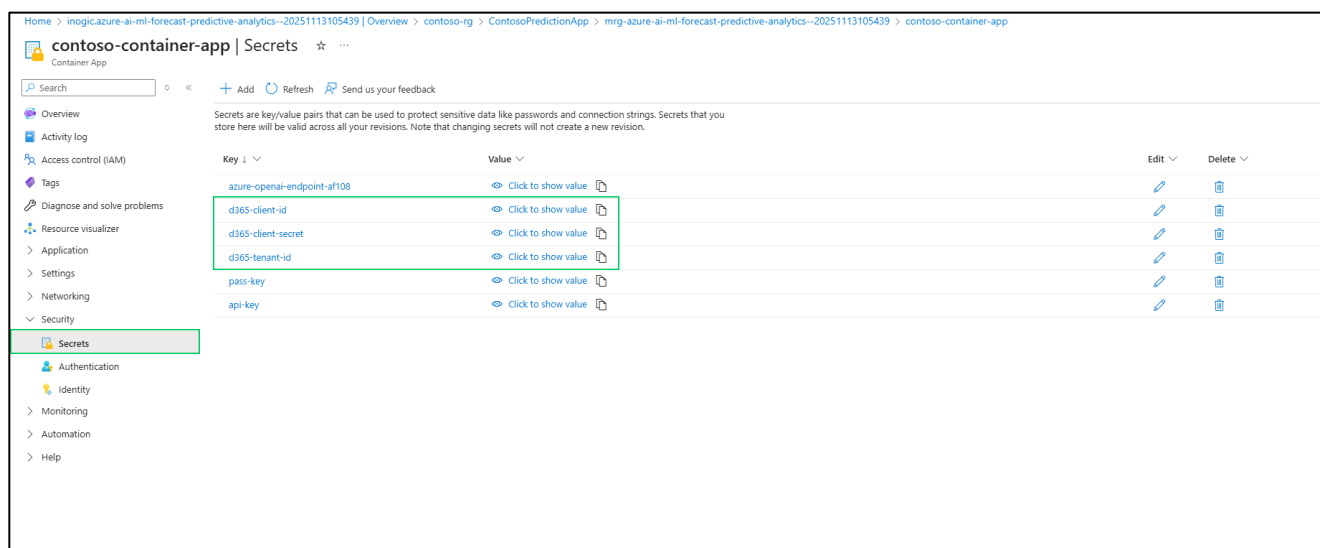
- (Optional) In the Container App settings, you can change the **cool-down period**. By default, it's **900 seconds**.
- The cool-down period is the idle timeout after which the container app becomes idle to save costs; a request sent after this idle period may require a few seconds for the app to spin up. Adjust this value based on usage and cost tradeoffs.



Add Dataverse (D365) Credentials to Container App Secrets

- In the Container App navigate to **Security** → **Secrets**. You must add values for the following three secret keys:
 - d365-client-id
 - d365-client-secret
 - d365-tenant-id

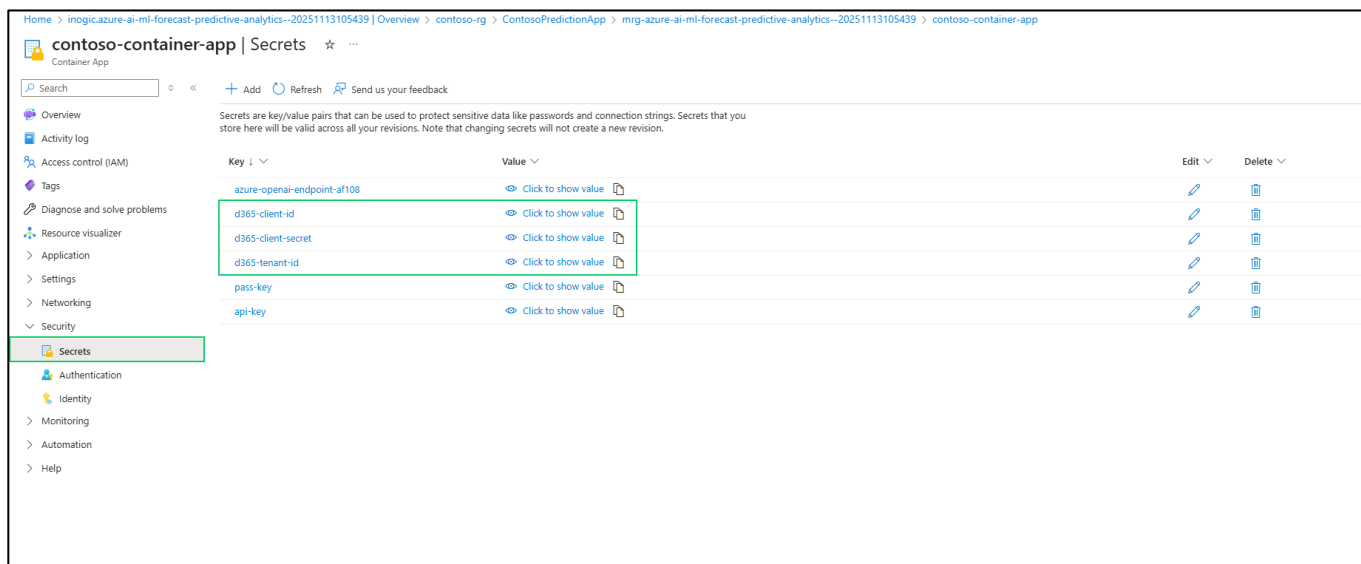
These values connect the container app to your Dataverse (Dynamics 365) environment.



Fill Container App Secrets with the Three Keys

Return to the Container App → **Security** → **Secrets**. For each secret key:

Click the secret (e.g., d365-client-id) → click the **Edit** icon.



Paste the corresponding value (client ID/tenant ID/client secret) → check the confirmation box → **Save**.
Repeat for d365-client-secret and d365-tenant-id

Edit secret

Key *

Type * ☒ Container Apps Secret
☐ Key Vault reference

Value *

☒ By checking this checkbox, you acknowledge that you need to restart currently active revisions for any changes you made to be updated.

Copy the Container App API Key

In the Container App secrets list, copy the **api-key** value. This API key is the secured authentication key used by Predict4Dynamics to talk to the container app. **Save this key**

Key ▾	Value ▾	Edit ▾	Delete ▾
d365-tenant-id	Click to show value		
pass-key	Click to show value		
api-key	Click to show value		
azure-openai-endpoint-as4ch	Click to show value		
d365-client-id	Click to show value		
d365-client-secret	Click to show value		

Validate Endpoint & API Key in Predict4Dynamics App

Open the **Predict4Dynamics** home page. Enter the **Endpoint URL** (container app URL) and the **API Key** you copied, then click **Validate**.

On successful validation you will receive a success notification on the form — then click **Save** to persist the connection.

Tip: If validation fails, re-check that the container app URL is correct and that the API key copied matches exactly; also ensure the container app is running and not idled (cool-down) when testing.

Troubleshooting (Common Issues)

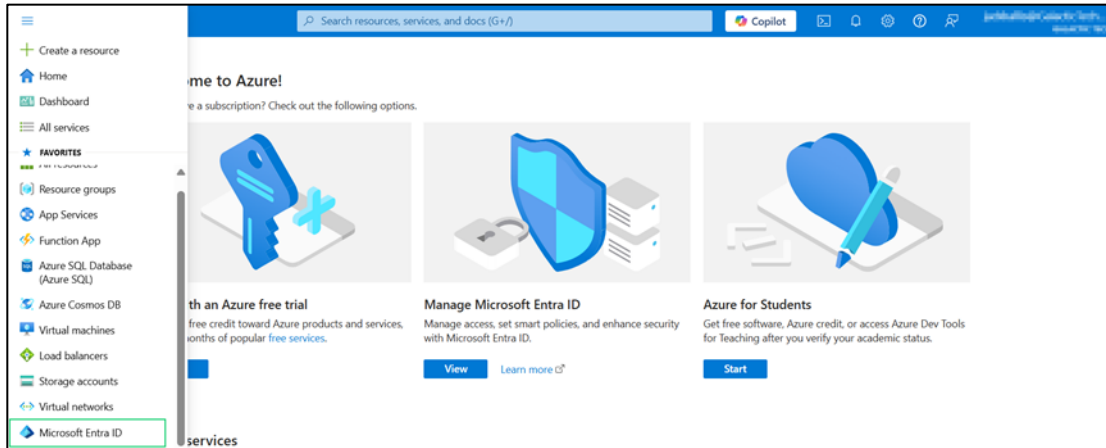
- **Insufficient subscription / missing permissions:** Confirm the Azure subscription is active and you have permissions to create resources (Owner or Contributor role).
- **Model/token selection errors:** Check that the selected model and token are available in your Azure tenant; if not, choose a supported model/token or provision required resources.
- **Managed Resource Group:** Use the resource visualizer to confirm all resources were created correctly.
- **Cool-Down Period:** Default 900s — adjust if frequent cold starts are a problem.
- **App Registration Secret Visibility:** The client secret value is available only once at creation. Copy and securely store it immediately.
- **Tenant Differences:** The Azure AD tenant that hosts Dataverse may differ from the tenant where the container app is deployed — ensure you register the app in the correct tenant.
- **Permission Scope:** Ensure user_impersonation permission for Dynamics CRM is added and admin consent granted; otherwise, API calls will fail.
- **Validation Failures:** If Predict4Dynamics validation fails during the endpoint/API key step, check the container app running state, the secrets accuracy, and that the container app endpoint is reachable from your network.

Application User

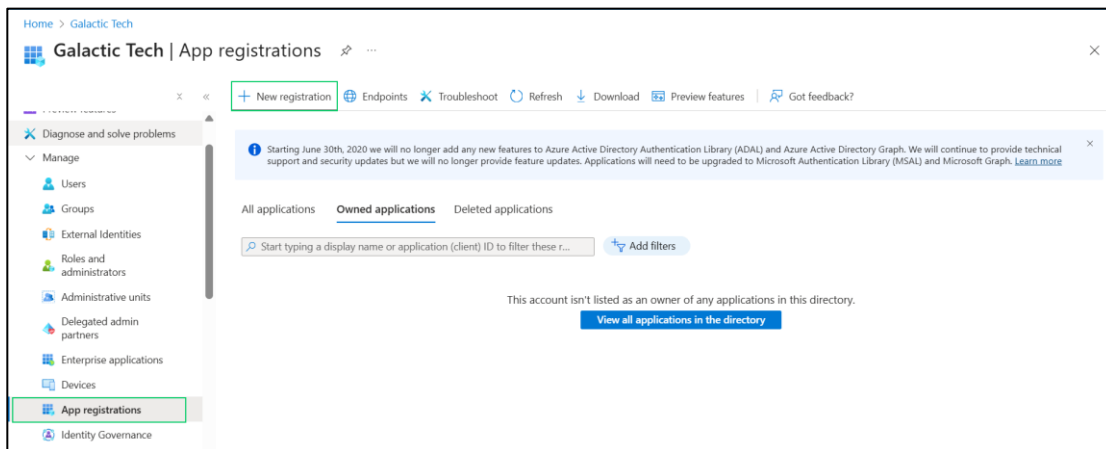
Create an App Registration in Microsoft Entra ID (to obtain the three keys)

- Open the Azure portal for the **Microsoft Entra ID (Azure AD)** tenant that hosts the Dataverse environment (this may be a different tenant than where the container app is deployed).

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- Navigate to **Manage → App registrations** and click **New registration**.



- Enter the application name and select the first (default) option for supported account types, then click **Register**.

Home > Galactic Tech | App registrations >

Register an application

* Name

The user-facing display name for this application (this can be changed later).

SampleContainerApp-Dataverse ✓

Supported account types

Who can use this application or access this API?

☒ Accounts in this organizational directory only (Galactic Tech only - Single tenant)

☐ Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant)

☐ Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)

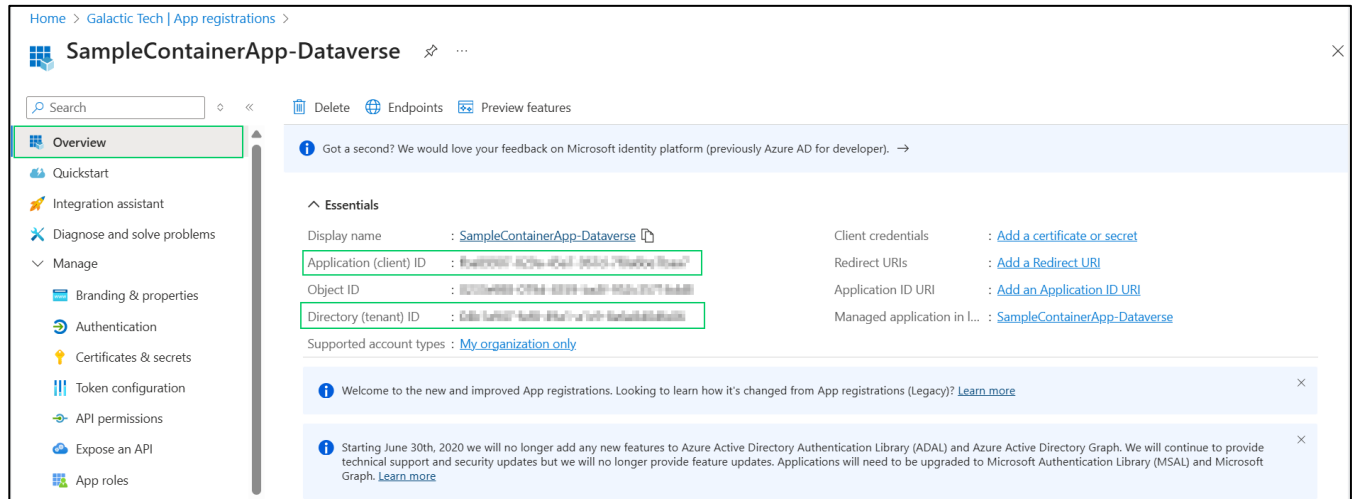
☐ Personal Microsoft accounts only

[Help me choose...](#)

By proceeding, you agree to the [Microsoft Platform Policies](#)

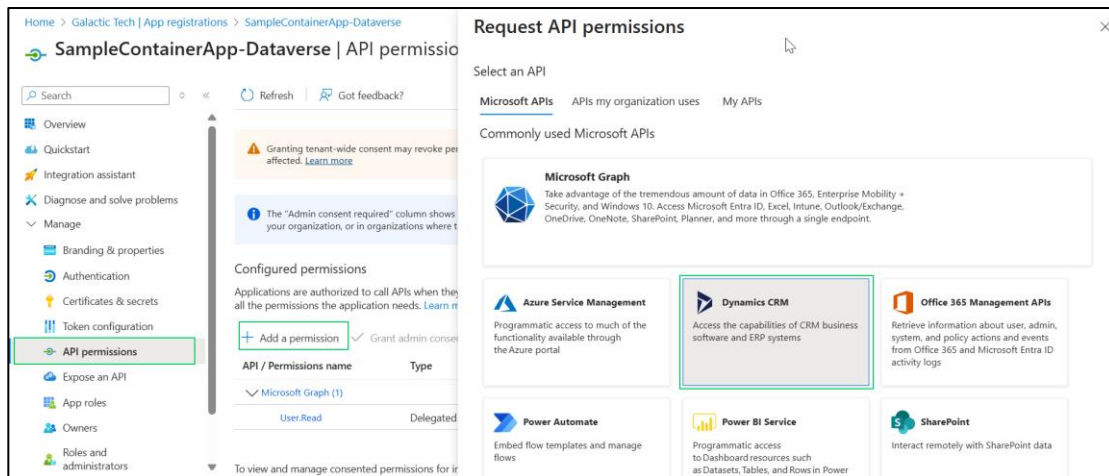
Register

- Copy the **Directory (tenant) ID** → this becomes d365-tenant-id.
- After the app registration is created:
- Open the application registration and copy the Application (client) ID → this becomes d365-client-id and Copy the Directory (tenant) ID → this becomes d365-tenant-id.



Grant API Permissions for Dynamics CRM

In the app registration, go to **Manage** → **API permissions** → **Add a permission**. Select **Dynamics CRM** from the API list.



Choose **Delegated permissions** and then check **user_impersonation**, then click **Add permissions**.

Request API permissions

< All APIs

 Dynamics CRM
https://admin.services.crm.dynamics.com/ Docs

What type of permissions does your application require?

Delegated permissions
Your application needs to access the API as the signed-in user.

Application permissions
Your application runs as a background service or daemon without a signed-in user.

Select permissions expand all

Start typing a permission to filter these results

Permissions (1)

Permission	Admin consent required
☒ user_impersonation Access Common Data Service as organization users	No

Click **Grant admin consent** to apply the permission for the tenant. This ensures the app can call Dynamics CRM APIs as the signed-in user.

Refresh Got feedback?

Granting tenant-wide consent may revoke permissions that have already been granted tenant-wide for that application. Permissions that users have already granted on their own behalf aren't affected. [Learn more](#)

The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column may not reflect the value in your organization, or in organizations where this app will be used. [Learn more](#)

Configured permissions

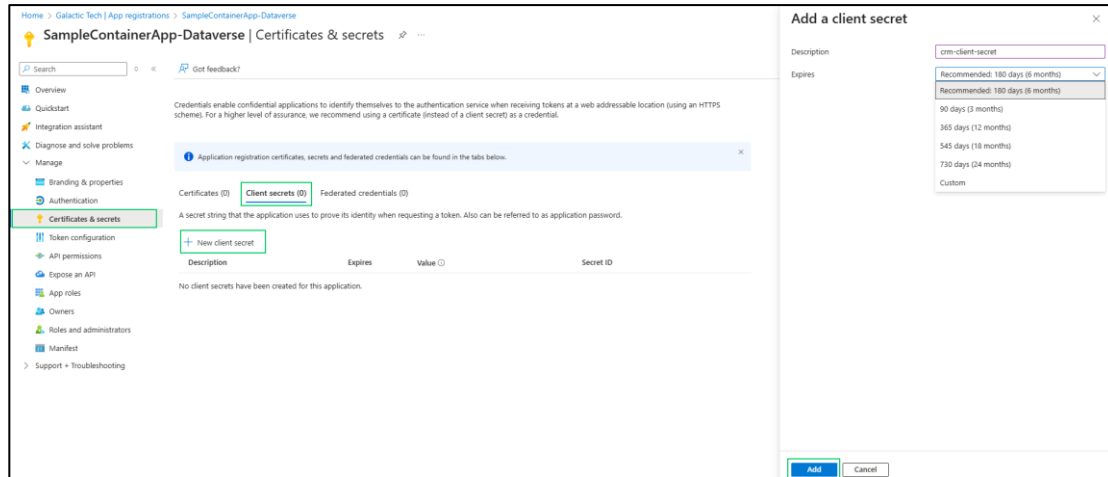
Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission ☒ Grant admin consent for this application

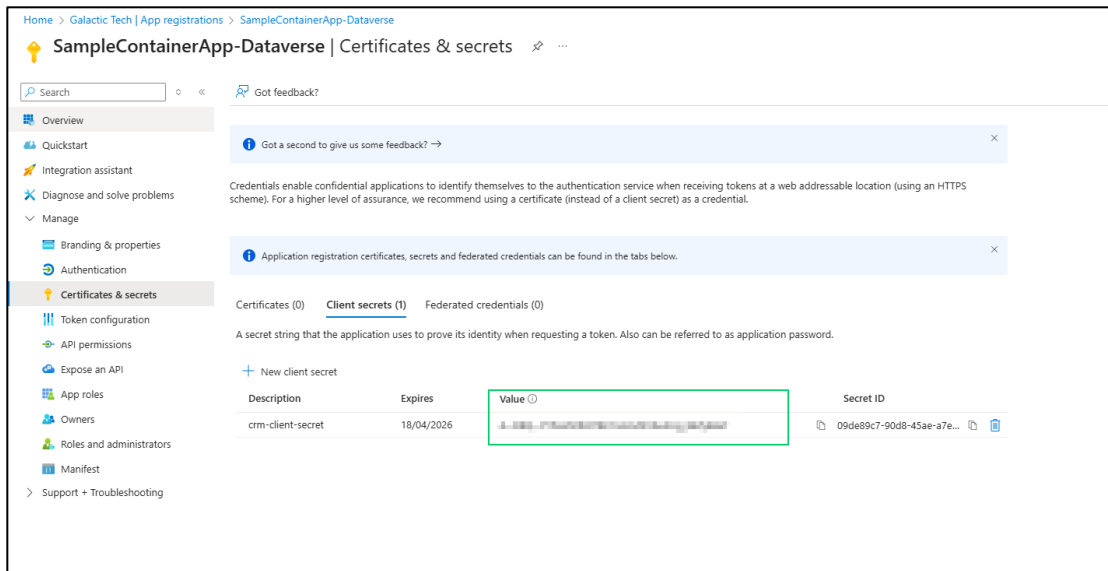
API / Permissions name	Type	Description	Admin consent required	Status
Dynamics CRM (1)				
user_impersonation	Delegated	Access Common Data Service as organization users	No	Granted for this application
Microsoft Graph (1)				
User.Read	Delegated	Sign in and read user profile	No	

Create a Client Secret (d365-client-secret)

In the app registration, go to **Manage → Certificates & secrets → New client secret**. Create a new secret and optionally set its expiry. Click **Add**.



Immediately copy the secret value — this value is shown only once. This copied value is the d365-client-secret you will add to the Container App secrets. **If you leave the page, you cannot retrieve this value later.**



Configure AI Model(s) in Predict4Dynamics

Create New Model

Go to **Predict AI Models** in the Predict4Dynamics app. Either **create a new model record** or select ready-to-use sample models.

1. Model Name

Enter a unique Model Name for identification. This name helps distinguish different predictive models you create for various CRM scenarios.

2. Select a Table to Predict

From the Select a Table to Predict dropdown, choose the Dynamics 365 table (entity) you want the model to run predictions on.

- Supports both OOB (out-of-box) and Custom entities
- Once configured, predictions will automatically appear in the Predict4Dynamics side panel for each respective record.

This step ensures the prediction engine understands which dataset to analyze.

3. Select Existing Data to Train Your Model On

In this field, enter a FetchXML query that retrieves the historical data needed for model training.

- The FetchXML should match the entity chosen in the previous step.
- The system uses this dataset to learn from past records and generate more accurate predictions.

Optimizing your FetchXML ensures cleaner data and better model accuracy.

← Save Save & Close + New

New Predict AI Model - Unsaved

Sharique Khan Owner Not Ready Status

General Prediction Settings AI Model Jobs

Form assist

Drop files or smart paste for Copilot to make suggestions

Model name

LeadClassificationModel

Select a table to predict

Lead

Select existing data to train your model on

```
<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>
```

4. Select Columns That Influence the Prediction

Choose the fields (columns) from the selected entity that directly impact the prediction outcome.

- These selected fields become the input features for model training.
- Predict4Dynamics uses these column values from the FetchXML results to understand patterns and behaviors.

Selecting high-quality influencing fields significantly improves prediction performance.

← Save Save & Close + New

New Predict AI Model - Unsaved

Sharique Khan Owner Not Ready Status

General Prediction Settings AI Model Jobs

Form assist

Drop files or smart paste for Copilot to make suggestions

Model name

LeadClassificationModel

Select a table to predict

Lead

Select existing data to train your model on

```
<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, Annual Revenue, Industry, Job Title, Lead Source, No. of Employees

Select a column to predict

Status

5. Select a Column to Predict

Pick the target column whose value you want the model to forecast.

- Example (Lead entity):
- Status → Predict whether a Lead will be *Qualified* or *Disqualified*
- Rating → Predict whether a Lead is *Hot*, *Warm*, or *Cold*

This helps automate decision-making by predicting real-time outcomes for CRM records.

← | 📄 Save | 📄 Save & Close | + New

New Predict AI Model - Unsaved Sharique Khan Not Ready Status

General Prediction Settings AI Model Jobs

Lead

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, Annual Revenue, Industry, Job Title, Lead Source, No. of Employees

Select a column to predict

Status

6. Prediction Settings

Prediction Trigger On

By default, Create and Update are selected.

- On Create: Prediction runs when a new record is added.
- On Update: Prediction runs when a selected influencing column is modified.

Users can customize triggers based on business needs—only Create, only Update, or both. This setting ensures predictions are always generated at the right moment.

← | 📄 Save | 📄 Save & Close | + New

New Predict AI Model - Unsaved Sharique Khan Not Ready Status

General Prediction Settings AI Model Jobs

Drop files or smart paste for Copilot to make suggestions

Prediction trigger on

Create and update

Display prediction on form

Lead

Prediction explainability settings

Explain Prediction

Yes

Custom Instructions

OpenAI settings

Model Name

gpt-model

API Version

2025-01-01-preview

7. Prediction Explainability

Enable or disable Explainable AI (XAI) insights.

- Yes: The system provides a human-readable explanation of *why* the prediction was generated.
- No: Only the predicted value is shown, without explanation.

This feature increases transparency and makes predictions easier to trust and interpret.

The screenshot shows the 'New Predict AI Model' form in the 'Prediction Settings' tab. The 'Display prediction on form' dropdown is highlighted with a green box, showing 'Lead' selected. Other visible settings include 'Prediction trigger on' set to 'Create and update', 'Explain Prediction' set to 'Yes', and 'Model Name' set to 'gpt-model'.

8. Display Prediction on Form

Select the CRM Form where you want the prediction result to appear. This ensures users can see predictions directly on the record form without navigating elsewhere, improving workflow efficiency.

This screenshot is identical to the one above, showing the 'New Predict AI Model' form with 'Lead' selected in the 'Display prediction on form' dropdown.

9. OpenAI Settings

By default:

- Model Name: gpt-model
- API Version: 2025-01-01-preview

If your Azure portal uses a different deployed model:

- Set Yes in *OpenAI Configuration Settings*
- Enter your custom Azure OpenAI model name and API version

This allows Predict4Dynamics to integrate seamlessly with your existing Azure OpenAI setup.

Predict4Dynamics – User Manual

The screenshot shows the 'New Predict AI Model' configuration page. At the top, there's a header bar with navigation icons and a title bar. Below the header, the page is titled 'New Predict AI Model - Unsaved'. The status bar indicates 'Not Ready' and 'Status'. The main content area is divided into several sections: 'General', 'Prediction Settings', and 'AI Model Jobs'. The 'Prediction Settings' section is active, showing a 'Drop files or smart paste for Copilot to make suggestions' area. Below this, there are two columns of settings. The left column includes 'Prediction trigger on' (set to 'Create and update'), 'Prediction explainability settings' (set to 'Yes'), and 'Custom Instructions'. The right column includes 'Display prediction on form' (set to 'Lead') and 'OpenAI settings' (which is highlighted with a green border). The 'OpenAI settings' section shows 'Model Name' as 'gpt-model' and 'API Version' as '2025-01-01-preview'.

Use existing model and update the existing model.

Step 1: Navigate to the Sample Models Section

- Open the **Predict4Dynamics** app inside your Dynamics 365 CRM environment.
- Go to the **Predict AI Models** area from the left-side navigation panel.
- You will see Sample AI models available for common CRM entities such as **Leads** and **Opportunities**.

The screenshot shows the Dynamics 365 Predict4Dynamics interface. On the left is a navigation pane with 'Home', 'Recent', 'Pinned', and 'Workspace' sections. The 'Workspace' section is active, showing 'Home' and 'Predict AI Models'. The 'Predict AI Models' link is highlighted with a green box. The main area displays a table titled 'Active Predict AI Models'. The table has columns: 'Model Name', 'Entity Name', 'Explain Prediction', 'Status', and 'Last Trained On'. Two models are listed: 'LeadClassificationModel' for 'lead' and 'OpportunityClassificationModel' for 'opportunity'. Both models have a status of 'Not Ready' and were last trained on 10/16/2025 6:56 PM and 10/18/2025 10:49 PM respectively. A green box highlights the 'Model Name' column. At the bottom, it says 'Rows: 2'.

Model Name	Entity Name	Explain Prediction	Status	Last Trained On
LeadClassificationModel	lead	Yes	Not Ready	10/16/2025 6:56 PM
OpportunityClassificationModel	opportunity	Yes	Not Ready	10/18/2025 10:49 PM

Step 2: Select a Sample Model

- Choose the model you want to configure — for example, **Lead Prediction Model** or **Opportunity Prediction Model**.
- Click on the **model record** to open its details page.

Step 3: Configure the Model

- On the model record page, click the **Configure Model** button.
- In the configuration window, review or modify:
 - **Select a table to predict:** Select the entity for which you want to train the model
 - **Select existing data to train your model on:** Here, paste a fetchxml with the entity and entity field based on which you want to configure the model.
- Save your configuration settings.

Predict4Dynamics – User Manual

LeadClassificationModel - Saved
Predict AI Model

General Prediction Settings AI Model Jobs Related

Model name
LeadClassificationModel

Select a table to predict
Lead

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>
```

Tip: Default configurations work for most organizations, but you can tailor them for higher accuracy by including business-specific fields such as lead source, region, or probability score.

Step 4: Train the Model

- Click the **Configure Model** button to start the training process.
- The model will use your organization's CRM data to learn patterns and generate predictive intelligence.
- While training is in progress, the model status will show **Queued** or **Running**.

Dynamics 365 Predict4Dynamics

Click 'Configure Model' to start the model configuration process.

LeadClassificationModel - Saved
Predict AI Model

General Prediction Settings AI Model Jobs Related

Model name
LeadClassificationModel

Select a table to predict
Lead

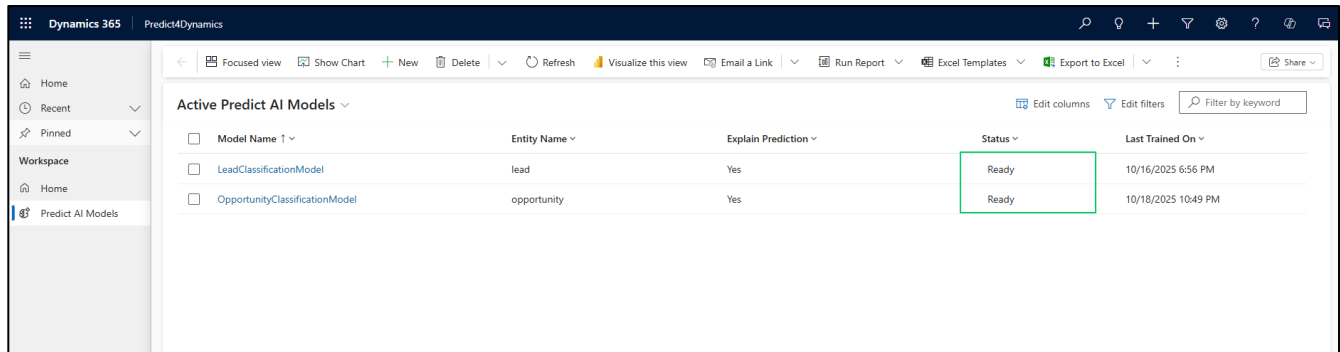
Select existing data to train your model on

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>
```

Step 5: Verify Training Completion

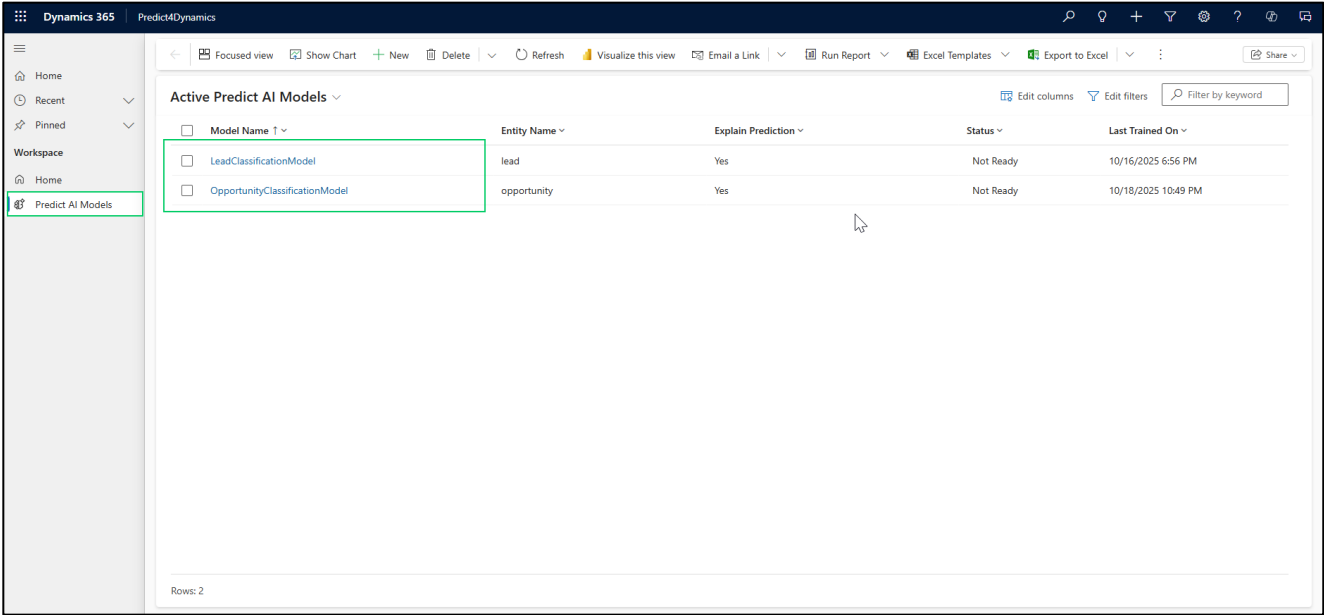
- Once training completes successfully, the model status will automatically change to **Ready**.



Model Name	Entity Name	Explain Prediction	Status	Last Trained On
LeadClassificationModel	lead	Yes	Ready	10/16/2025 6:56 PM
OpportunityClassificationModel	opportunity	Yes	Ready	10/18/2025 10:49 PM

Step 6: Use the Model for Prediction

- After the model status is **Ready**, it becomes active for prediction.
- Predictions are triggered automatically when a **Lead** or **Opportunity** record is created or updated.
- Open any record and view the prediction results in the **Predict4Dynamics side pane**, which displays both prediction outcomes and explanation details.

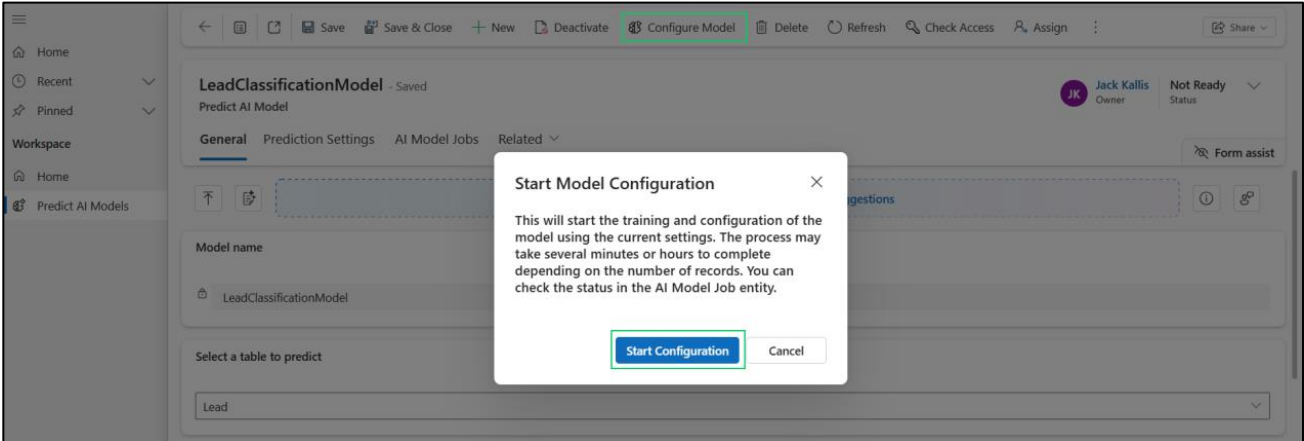


The screenshot shows the Dynamics 365 Predict4Dynamics interface. On the left is a navigation pane with 'Predict AI Models' selected. The main area displays a table titled 'Active Predict AI Models'. The table has columns for 'Model Name', 'Entity Name', 'Explain Prediction', 'Status', and 'Last Trained On'. Two models are listed: 'LeadClassificationModel' for the 'lead' entity and 'OpportunityClassificationModel' for the 'opportunity' entity. Both have a status of 'Not Ready' and were last trained on 10/16/2025 and 10/18/2025 respectively. A green box highlights the 'Model Name' column header and the two model rows. A mouse cursor is pointing at the 'Explain Prediction' column for the 'opportunity' model.

Model Name	Entity Name	Explain Prediction	Status	Last Trained On
LeadClassificationModel	lead	Yes	Not Ready	10/16/2025 6:56 PM
OpportunityClassificationModel	opportunity	Yes	Not Ready	10/18/2025 10:49 PM

Configure & publish model

Click **Configure Model** on the target model record. When prompted, start the configuration by clicking **Start Configuration**. This will queue the model configuration.



The screenshot shows the configuration page for the 'LeadClassificationModel'. The 'Configure Model' button in the top toolbar is highlighted with a green box. A modal dialog box titled 'Start Model Configuration' is open in the center. The dialog contains the following text: 'This will start the training and configuration of the model using the current settings. The process may take several minutes or hours to complete depending on the number of records. You can check the status in the AI Model Job entity.' At the bottom of the dialog are two buttons: 'Start Configuration' (highlighted with a green box) and 'Cancel'. In the background, the configuration page shows the 'Model name' as 'LeadClassificationModel' and 'Select a table to predict' as 'Lead'.

After starting configuration, the model status will show **Queued**, and an **AI Model Job** record is created in the AI model jobs entity to track progress.

Predict4Dynamics – User Manual

Model configuration has started.

LeadClassificationModel - Saved
Predict AI Model

General Prediction Settings AI Model Jobs Related

Drop files or smart paste for Copilot to make suggestions

Model name
LeadClassificationModel

Select a table to predict
Lead

LeadClassificationModel - Saved
Predict AI Model

General Prediction Settings **AI Model Jobs** Related

Drop files or smart paste for Copilot to make suggestions

Active AI Model Jobs

Job Name	Created On	Duration	Status	Error Details
LeadClassificationModel-2025-10-20-55	10/20/2025 9:19 AM		Running	

Rows: 1

Monitor the AI Model Job record until the job shows **Completed**. Once the job completes, the **Predict AI Model** entity status will change to **Ready**, indicating the model is trained and available for predictions.

LeadClassificationModel - Saved
Predict AI Model

General Prediction Settings **AI Model Jobs** Related

Drop files or smart paste for Copilot to make suggestions

Active AI Model Jobs

Job Name	Created On	Duration	Status	Error Details
LeadClassificationModel-2025-10-16-10	10/16/2025 6:49 PM	0m 10s	Completed	

Rows: 1

Generate prediction & View Result

- Navigate to the **Lead** entity (or any entity you configured to receive predictions). Create a new lead (or update the configured fields on an existing lead) — predictions will be triggered automatically if you configured the model to run on **create/update events**.

- To view the prediction for the record, open the lead record and click the **Predict4Dynamics side pane** button (side pane action) — the prediction and explanation will be displayed.

The screenshot displays the Predict4Dynamics interface within a CRM system. The main view shows a lead record for John Thomas, with a summary of the lead's status and a timeline of activities. The side pane, titled 'Predict4Dynamics', is open on the right, showing the 'LeadPredictionModel' results. The predicted outcome is 'Qualified' with a confidence score of 83.02. The side pane also includes a 'Prediction Summary' section with a 'PREDICTION SUMMARY' and 'POSITIVE FACTORS' and 'NEGATIVE FACTORS'.

Predict4Dynamics

LeadPredictionModel

Predicted Outcome
Qualified

Confidence Score
83.02

Prediction Summary

PREDICTION SUMMARY:
The lead is classified as "Qualified" with a high probability of success.

POSITIVE FACTORS:

- 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.

Post-Deployment Checks & Tips

- Verify the container app is running in the resource group you chose and that the managed application resources are created.
- Confirm the Azure AI service (if auto-created) is present and the model is deployed.
- If you used an existing resource group, double-check there were no conflicts and that the group was empty before deployment.
- Ensure that chosen model tokens/quota in your subscription cover expected usage — adjust Azure quotas if necessary.

Features

Ready to use sample models for Leads and Opportunities

Predict4Dynamics transforms how CRM users handle leads and opportunities by embedding ready-to-use AI

models directly within Dynamics 365.

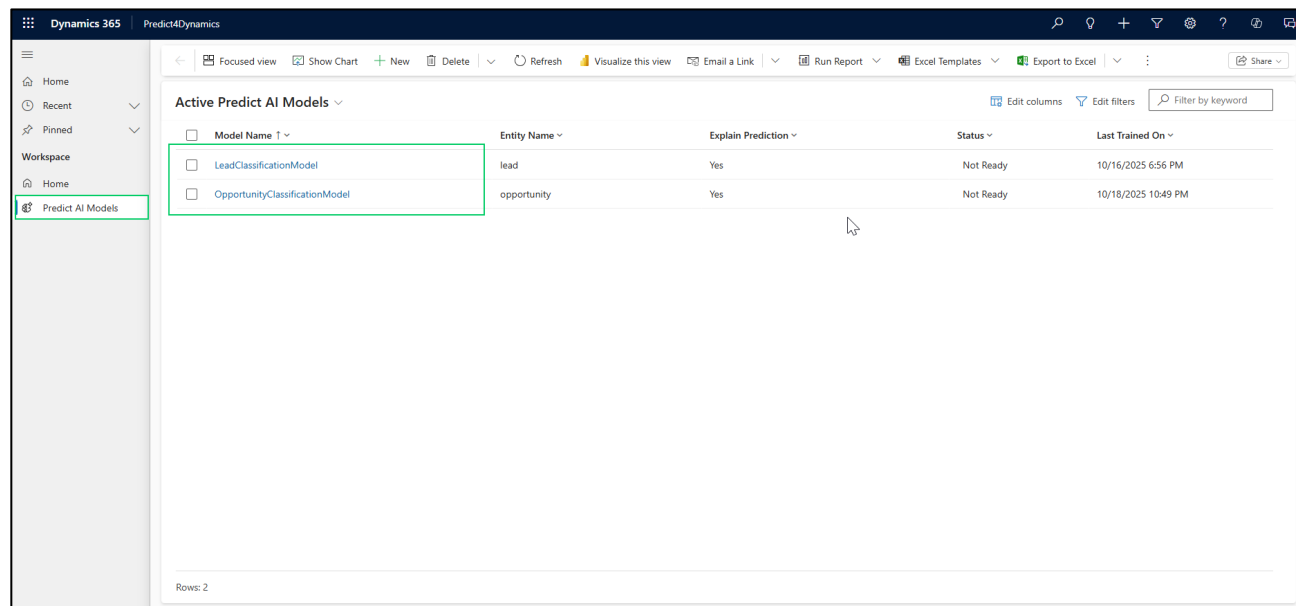
The **Sample Models for Leads and Opportunities** feature enables administrators to instantly start using ML-Driven predictive models within Dynamics 365 CRM without building models from scratch. These ready-to-use models can be trained using your organization’s existing CRM data to forecast lead conversions and opportunity outcomes accurately.

These predictive models instantly analyze your organizational data to forecast lead conversion, opportunity success rates, and revenue potential. Users can simply train the models on their own datasets, enabling personalized predictions tailored to their business context.

For example, you can quickly identify which leads are most likely to convert or which opportunities require immediate attention, allowing your sales teams to focus on high-value prospects and make smarter, data-driven decisions.

Step 1: Navigate to the Sample Models Section

- Open the **Predict4Dynamics** app inside your Dynamics 365 CRM environment.
- Go to the **Predict AI Models** area from the left-side navigation panel.
- You will see Sample AI models available for common CRM entities such as **Leads** and **Opportunities**.



Step 2: Select a Sample Model

- Choose the model you want to configure — for example, **Lead Prediction Model** or **Opportunity Prediction Model**.
- Click on the **model record** to open its details page.

Step 3: Configure the Model

- On the model record page, click the **Configure Model** button.
- In the configuration window, review or modify:
 - **Select a table to predict:** Select the entity for which you want to train the model
 - **Select existing data to train your model on:** Here, paste a fetchxml with the entity and entity field based on which you want to configure the model.
- Save your configuration settings.

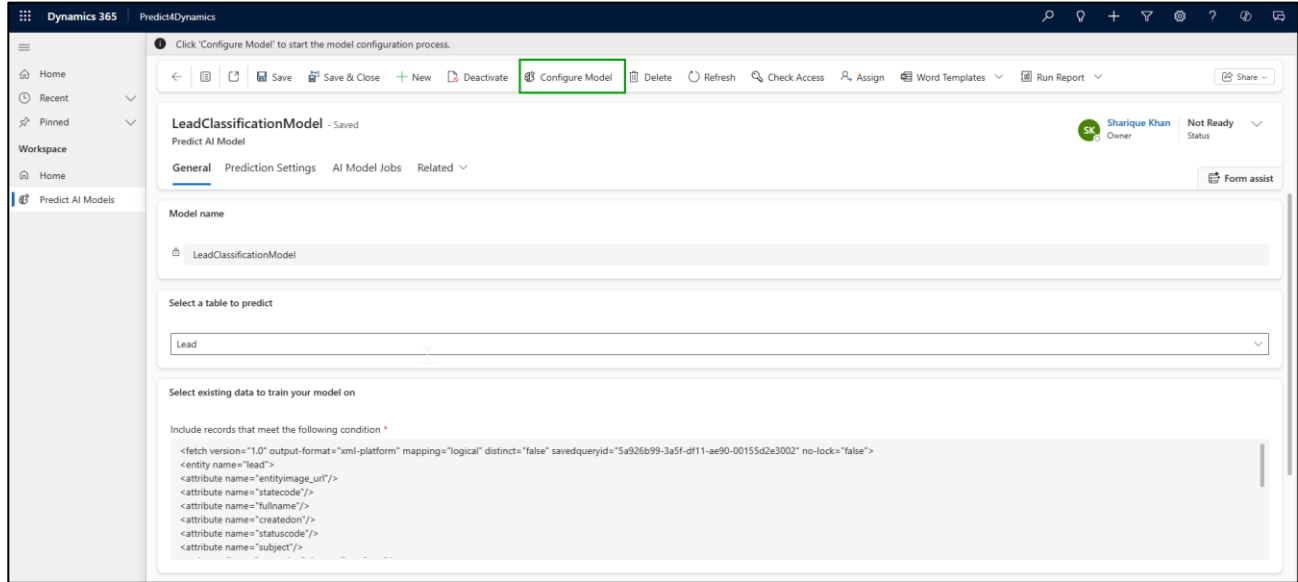
The screenshot shows the 'Configure Model' interface for a model named 'LeadClassificationModel'. The left sidebar contains navigation links: Home, Recent, Pinned, Workspace, and Predict AI Models. The top toolbar includes actions like Save, Save & Close, New, Deactivate, Configure Model, Delete, Refresh, Check Access, Assign, Word Templates, and Share. The main content area has tabs for General, Prediction Settings, AI Model Jobs, and Related. The 'General' tab is active, showing the 'Model name' as 'LeadClassificationModel'. Below this, there is a 'Select a table to predict' dropdown menu with 'Lead' selected. Further down, the 'Select existing data to train your model on' section contains a text area with a sample fetchxml query:

```
<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>
```

Tip: Default configurations work for most organizations, but you can tailor them for higher accuracy by including business-specific fields such as lead source, region, or probability score.

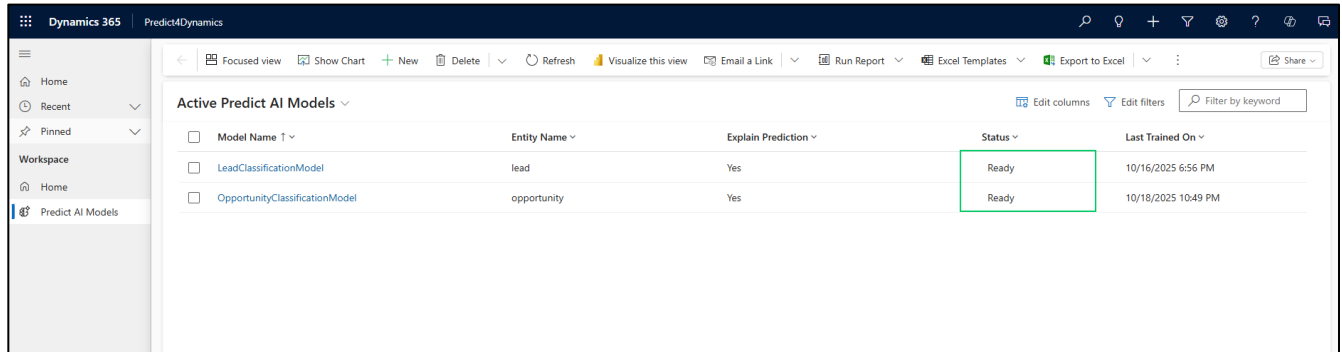
Step 4: Train the Model

- Click the **Configure Model** button to start the training process.
- The model will use your organization's CRM data to learn patterns and generate predictive intelligence.
- While training is in progress, the model status will show **Queued** or **Running**.



Step 5: Verify Training Completion

- Once training completes successfully, the model status will automatically change to **Ready**.



Step 6: Use the Model for Prediction

- After the model status is **Ready**, it becomes active for prediction.
- Predictions are triggered automatically when a **Lead** or **Opportunity** record is created or updated.
- Open any record and view the prediction results in the **Predict4Dynamics side pane**, which displays both prediction outcomes and explanation details.

Outcome

By following these steps, administrators can quickly deploy AI-driven predictive scoring for Leads and Opportunities without complex setup. The sample models shorten the implementation time, enhance forecasting accuracy, and enable proactive decision-making directly within Dynamics 365 CRM.

Extensive Coverage for OOB and Custom Entities

Predict4Dynamics empowers you to extend predictive insights beyond standard CRM modules by supporting both out-of-the-box (OOB) and custom entities in Dynamics 365.

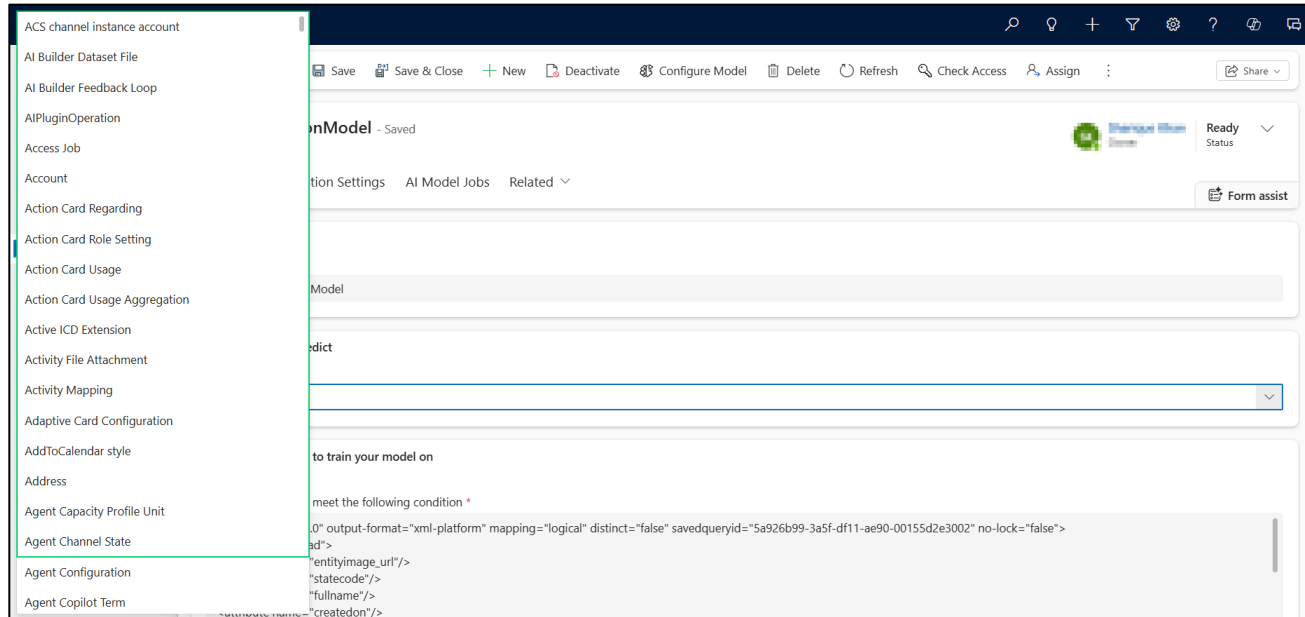
Unlike conventional predictive solutions that are limited to predefined entities, this feature allows you to create AI-driven models for any entity in your CRM, whether it's a standard module like Leads or Opportunities, or a custom entity unique to your organization.

For example, you can now build predictive models for custom entities such as **Vendor Contracts**, **Field Inspections**, or **Project Milestones**, enabling you to forecast outcomes, identify risks, and prioritize actions based on data-driven insights.

- Allows users to create prediction models for both **Out-of-the-Box (OOB)** and **custom entities**.
- From the **“Select a Table to Predict”** dropdown, choose the entity you want to configure for predictions.
- The list displays all available entities — select either a standard CRM entity or a custom one as per your requirement.
- Once selected, proceed with model configuration to enable AI predictions for the chosen entity.

The screenshot displays the Predict4Dynamics configuration interface for a model named 'LeadClassificationModel'. The interface is divided into a sidebar and a main content area. The sidebar on the left contains navigation links: Home, Recent, Pinned, and a 'Workspace' section with 'Home' and 'Predict AI Models'. The main content area has a top toolbar with icons for Save, Save & Close, New, Deactivate, Configure Model, Delete, Refresh, Check Access, Assign, Word Templates, Run Report, and Share. Below the toolbar, the model name 'LeadClassificationModel' is shown with a 'Ready Status' indicator. The 'General' tab is active, showing the 'Model name' as 'LeadClassificationModel'. A dropdown menu labeled 'Select a table to predict' has 'Lead' selected. Below this, a section titled 'Select existing data to train your model on' contains a text area with XML data:

```
<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>
```



By seamlessly integrating with Dynamics 365, Predict4Dynamics ensures these models are **real-time, explainable, and actionable**—helping you make confident decisions across sales, service, operations, and projects.

Leveraging Multiple Predictive Models for each Entity

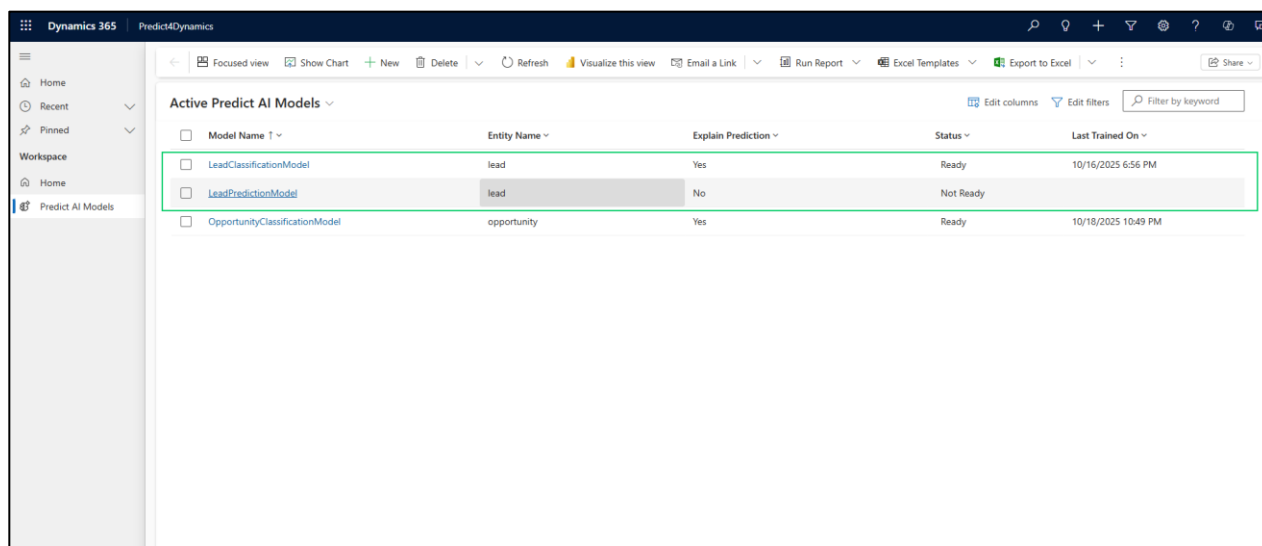
Predict4Dynamics enhances predictive insights by allowing multiple AI models to be trained and deployed for a single CRM entity, such as leads, opportunities, or any custom entities.

This feature lets you create segment-specific models or test different model configurations tailored to your unique business scenarios.

For example, you could maintain separate lead prediction models for different regions, product lines, or customer segments, ensuring predictions are more accurate and actionable.

- Allows users to create and train **multiple AI models** for the same CRM entity.
- Modify configuration data such as **FetchXML**, **Select Columns that Influence the Prediction**, or **Select a Column to Predict** to build variations of the model.
- Enables comparison, testing, and optimization of different model configurations for improved prediction accuracy.

Predict4Dynamics – User Manual



The screenshot shows the Dynamics 365 Predict4Dynamics interface. On the left is a navigation pane with 'Home', 'Recent', 'Pinned', and 'Workspace' sections. The 'Workspace' section is active, showing 'Predict AI Models'. The main area displays a table titled 'Active Predict AI Models'. The table has columns: Model Name, Entity Name, Explain Prediction, Status, and Last Trained On. Three models are listed: LeadClassificationModel, LeadPredictionModel, and OpportunityClassificationModel. The first two models are highlighted with a green border.

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



The screenshot shows a form titled 'Select existing data to train your model on'. It includes a section for 'Include records that meet the following condition' with a text area containing XML code. Below this is a section for 'Select columns that influence the prediction' with a dropdown menu. At the bottom is a section for 'Select a column to predict' with a dropdown menu.

Select existing data to train your model on

Include records that meet the following condition *

```
<fetch version="11.0" 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

With this capability, you can ask customized explanations for prediction, like, “Leads in the North region that are most likely to convert this quarter?” or “Opportunities in our enterprise segment have the highest probability of closing this month?”

Predict4Dynamics intelligently selects the most relevant model, providing real-time, data-driven predictions and context-rich insights to guide your sales, service, and operational strategies.

By supporting multiple models per entity, Predict4Dynamics empowers Dynamics 365 users to

- ✓ fine-tune AI predictions,
- ✓ improve forecasting precision,
- ✓ and make informed decisions with confidence

—all without additional licensing or complex AI setups. This flexibility ensures your CRM data drives smarter, proactive business outcomes, transforming your Dynamics 365 CRM into a predictive, AI-powered decision engine.

Seamless Prediction Automation & Triggers

Predict4Dynamics' Automatic Prediction Triggers transform how Dynamics 365 CRM users access predictive insights by eliminating the need for manual model execution.

Unlike traditional prediction workflows, where users must actively run AI models or refresh dashboards, this intelligent feature automatically generates predictions whenever a record is created or updated.

Whether it's a new lead entering the system or an opportunity being modified, Predict4Dynamics ensures that your team always has the latest, actionable insights at their fingertips, without any manual intervention.

- For example, when a new lead is added, the system can instantly forecast conversion probability and potential revenue.
- Enables automatic generation of predictions when a record is **created or updated** for the selected entity.

The screenshot displays the configuration page for a 'LeadClassificationModel' in Predict4Dynamics. The interface includes a sidebar with navigation options like Home, Recent, Pinned, and Workspace. The main content area has tabs for General, Prediction Settings (active), AI Model Jobs, and Related. A top bar contains various action buttons such as Save, Deactivate, Configure Model, and Run Report. The 'Prediction trigger on' dropdown menu is open, showing options: Create, Update, Create and update (selected), and Explain prediction. The 'Display prediction on form' dropdown is set to Information. The 'OpenAI settings' section shows the Model Name as 'gpt-model' and the API Version as '2025-01-01-preview'. The 'Human Explanation' dropdown is set to 'Yes'.

- Once the model is successfully trained and its status is marked as **Ready**, the system triggers predictions based on the actions selected in the **Prediction Trigger** dropdown (e.g., Create or Update).
- If **Human Explanation** is set to **Yes**, users receive AI-generated, easy-to-understand reasoning along with the prediction.

LeadClassificationModel - Saved
Predict AI Model

General **Prediction Settings** AI Model Jobs Related ▾

Ready Status ▾
Form assist

Prediction trigger on
Create and update ▾

Display prediction on form
Lead ▾

Prediction explainability settings

Explain Prediction
Yes ▾

Custom Instructions

OpenAI settings

Model Name
gpt-model

API Version
2025-01-01-preview

- Administrators can also add **Custom Instructions** to define how the AI explanation should be presented in a preferred tone or format.

Prediction explainability settings

Explain Prediction
Yes ▾

Custom Instructions

After generating the prediction summary, suggest the next best action for the user based on the prediction result.

Similarly, updates to opportunity records immediately trigger predictions on deal closure likelihood, enabling sales teams to prioritize efforts and make data-driven decisions in real time.

By leveraging real-time automation, this predictive functionality reduces lag between data entry and actionable insight, ensuring your team can respond proactively rather than reactively. It not only accelerates decision-making but also enhances operational efficiency, improves forecasting accuracy, and maximizes business outcomes.

Model Customization

The **Model Customization** feature in Predict4Dynamics empowers CRM administrators to take full control over ML-driven predictions, ensuring that insights are perfectly aligned with your organization’s unique business logic and data.

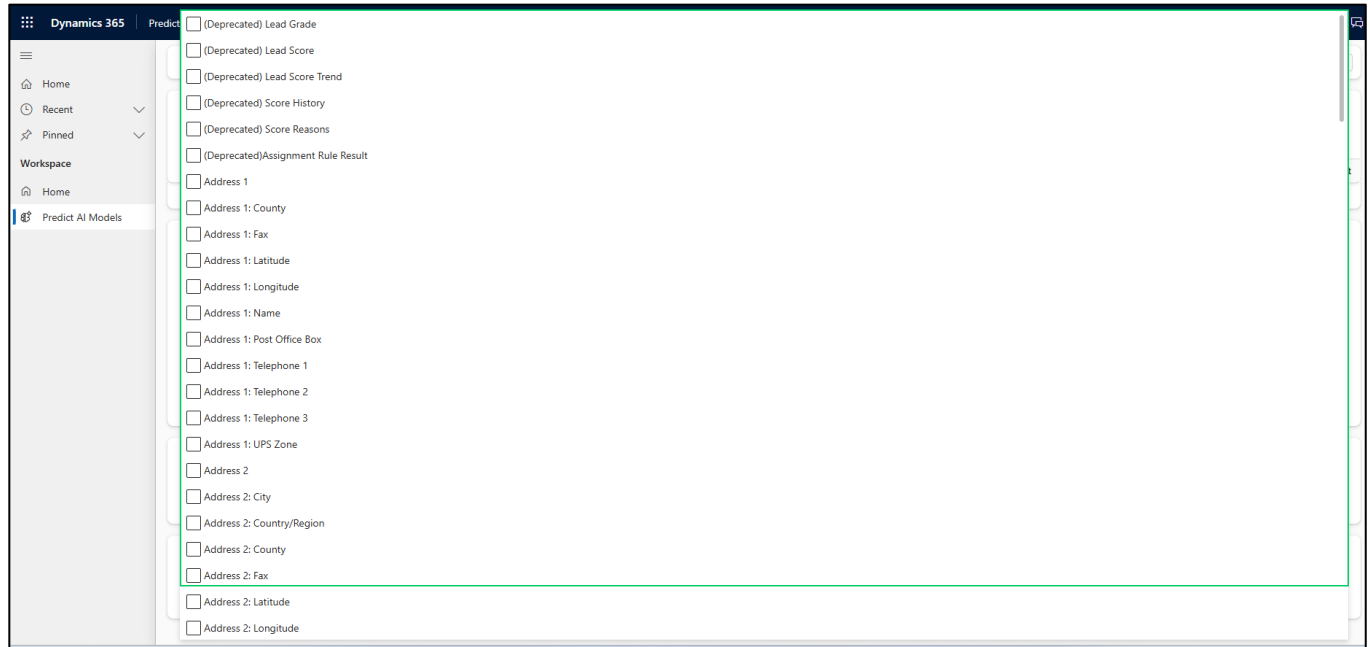
This feature allows administrators to modify shipped prediction models by selecting the most relevant columns, applying filters, and adjusting parameters to reflect real-world business scenarios. This ensures that every prediction—whether for leads, opportunities, customer churn, or project outcomes—is tailored to the context and priorities that matter most to your team.

For example, with Model Customization, you can predict sales forecast for *“leads that are most likely to convert this quarter based on region and engagement history”*. The tool dynamically applies your custom configurations to generate accurate, actionable forecasts, helping sales, service, and operations teams make informed decisions faster.

Step to customize AI Prediction model:

- Open the **Predict AI Model** record.
- In the configuration window, define the data for training by adding or editing the **FetchXML query** under *“Include records that meet the following condition.”*
- From the **“Select columns that influence the prediction”** list, choose the fields that impact the prediction (e.g., Rating, Annual Revenue, Job Title, etc.).
- Finally, select the **target column** under *“Select a column to predict”* and save the configuration to apply changes for the next model training, and then click on the configure model button to start the model training with the updated data

The screenshot displays the 'Predict AI Model' configuration window for a record named 'LeadClassificationModel'. The interface includes a top navigation bar with various actions like Save, Deactivate, and Configure Model. The left sidebar shows the 'Predict AI Models' section. The main content area is divided into tabs: 'General', 'Prediction Settings', 'AI Model Jobs', and 'Related'. The 'General' tab is selected, showing a 'FetchXML query' field with a sample query for 'lead' entity. Below this is a 'Select columns that influence the prediction' dropdown menu, and at the bottom is a 'Select a column to predict' dropdown menu. The 'FetchXML query' field contains a sample query for 'lead' entity with attributes like 'statecode', 'fullname', 'createdon', 'statuscode', and 'subject'. The 'Select columns that influence the prediction' dropdown shows a list of columns including 'Preferred Method of Contact', 'Rating', 'Topic', 'Annual Revenue', 'Currency', 'Customer', 'Industry', 'Job Title', 'Lead Source', 'No. of Employees', and 'Status'. The 'Select a column to predict' dropdown shows 'Status' selected.



By combining user-driven model adjustments with the power of AI, Predict4Dynamics enhances prediction accuracy, improves interpretability, and ensures that insights are aligned with your organization’s unique objectives. This feature not only saves time but also boosts confidence in AI-driven decision-making, transforming raw data into a strategic asset across Dynamics 365 CRM.

Explainable AI with Azure OpenAI

Predict4Dynamics’s Explainable AI with Azure OpenAI transforms how Dynamics 365 CRM users understand and trust AI-driven predictions by providing clear, **human-understandable explanations** for every outcome.

Unlike standard predictive tools that only display results or top influencing factors, this feature goes deeper, offering contextual reasoning and insights into **why** a prediction was made. Users can immediately see the rationale behind lead scoring, opportunity forecasts, customer churn predictions, or project risk assessments, empowering confident, data-driven decision-making.

Steps to enable Explainable AI with Azure OpenAI

- Navigate to the **Prediction Settings** tab in the Predict AI Model form.
- Under **Prediction Explainability Settings**, set **Explain Prediction** to **Yes** to enable human-readable explanations for every prediction.
- (Optional) In **Custom Instructions**, add a prompt to define how explanations should be presented—for example, the tone, level of detail, or summary style.
- Once enabled, when a prediction is generated (e.g., for a Lead), the **Predict4Dynamics panel** displays a detailed explanation that includes **Prediction Summary**, **Positive Factors**, **Negative Factors**, and **Overall Impact**, helping users understand **why** a prediction was made.

Predict4Dynamics – User Manual

The screenshot shows the 'LeadClassificationModel' configuration page. At the top, there's a header with 'Predict AI Model' and a 'Ready' status. Below the header, there are tabs: 'General', 'Prediction Settings' (selected), 'AI Model Jobs', and 'Related'. The 'Prediction Settings' tab contains several sections: 'Prediction trigger on' with a dropdown set to 'Create and update'; 'Display prediction on form' with a dropdown set to 'Lead'; 'Prediction explainability settings' with a green-bordered box containing 'Explain Prediction' set to 'Yes' and a 'Custom Instructions' text area; and 'OpenAI settings' with 'Model Name' set to 'gpt-model' and 'API Version' set to '2025-01-01-preview'. A 'Form assist' button is located in the top right corner.

By leveraging **Azure OpenAI**, these explanations are dynamically generated, accurate, and easy to interpret, even for users without a technical background.

The screenshot displays the Predict4Dynamics user interface. The top navigation bar includes icons for navigation and actions like 'Save', 'Save & Close', 'New', 'Delete', 'Click2Export', and 'Share'. A 'Summary' tab is active, showing a lead profile for 'John Thomas' with a 'Lead' status. The lead is 'Interested in Trial account setup' and was created on 10/17/2025. The lead's 'Quality' is 'Qualify (13 D)'. The lead is currently in the 'Develop' stage of a sales pipeline. The right sidebar shows a 'Prediction Summary' with a score of 83.02. The summary includes a 'PREDICTION SUMMARY' section stating the lead is predicted to be 'Qualified' with a high probability of success. It also includes a 'FINAL CONCLUSION' section and 'POSITIVE FACTORS' such as revenue generated, financial stability, and the lead's role as a System Administrator. 'NEGATIVE FACTORS' include the lead's 'Cold' status and preferred contact method being 'Phone'. An 'OVERALL IMPACT' section concludes that the combination of factors leads to a high probability of the lead being qualified. A 'Show Less' link is at the bottom of the summary.

This capability not only builds trust in AI predictions but also accelerates business decisions by making complex data insights accessible and actionable. Whether you are managing sales pipelines, customer service cases, field service schedules, or project operations, Explainable AI provides the clarity needed to act confidently, **without requiring additional AI Builder credits or advanced licensing**.

Configurable Prompt Templates for Insightful Explanations

Predict4Dynamics empowers administrators with full control over how AI-generated explanations are delivered through its **Custom Prompt Instructions** feature.

Unlike standard predictive insights that provide generic reasoning, this feature allows you to define tailored

prompts that guide Azure OpenAI in generating contextual, human-understandable explanations for each prediction.

With this feature, you can control the **tone, depth, and format** of the AI explanations to align with your organization’s communication style and reporting needs.

For example, you can instruct the AI to provide concise business-focused summaries for leadership reviews, or detailed step-by-step reasoning for operational teams, ensuring that every prediction is clear, actionable, and trustworthy.

By leveraging Custom Prompt Instructions, Predict4Dynamics not only enhances transparency and explainability in AI-driven insights but also improves **user confidence and decision-making** across Dynamics 365 CRM. Whether you are analyzing lead conversion predictions, opportunity scoring, or project forecasts, **this feature ensures that your teams understand the “why” behind every recommendation**, without needing to navigate complex AI models or technical jargon.

Steps to use custom instructions

- Navigate to the **Prediction Settings** tab in the Predict AI Model form.
- Under **Prediction Explainability Settings**, set **Explain Prediction** to **Yes** (This is mandatory to use custom instructions).
- In **Custom Instructions**, add a prompt to define how explanations should be presented—for example, the tone, level of detail, or summary style.

Prediction explainability settings

Explain Prediction

Yes

Custom Instructions

After generating the prediction summary, suggest the next best action for the user based on the prediction result.

Predict4Dynamics

- 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.

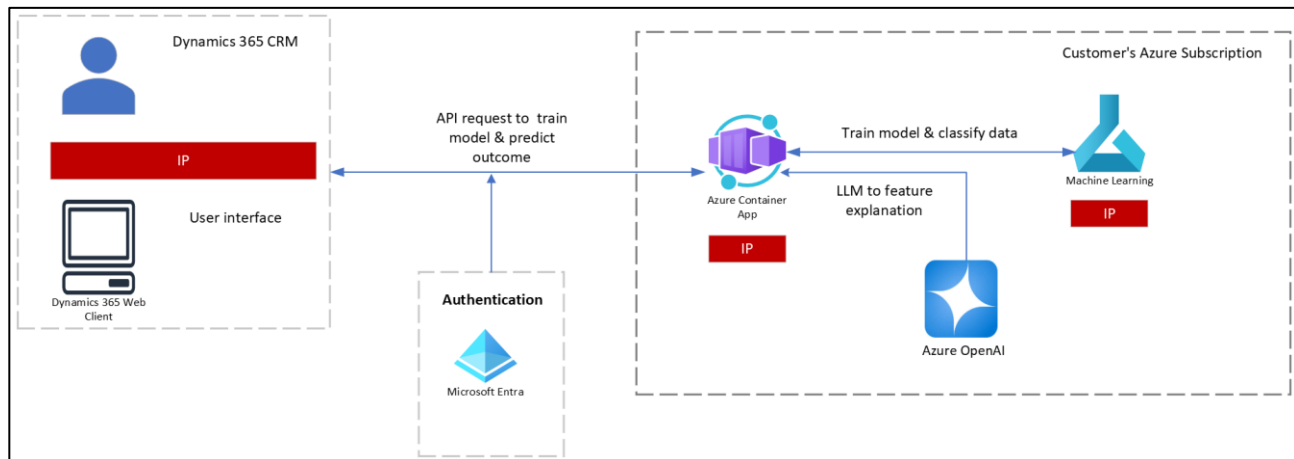
[Show Less](#)

Scalable and Secure Tenant Isolation Framework

Predict4Dynamics ensures that all ML-Driven predictive analytics operate within a fully secure and tenant-isolated environment, giving organizations complete control over their data.

This architecture guarantees that no data ever leaves your environment, maintaining full compliance with organizational security policies and regulatory standards. Users can confidently generate predictions, analyze trends, and access explainable AI insights without worrying about data exposure or privacy risks.

By keeping all AI operations tenant-contained, Predict4Dynamics not only enhances security but also optimizes performance by reducing latency and ensuring seamless integration with Dynamics 365 CRM workflows. Whether predicting lead conversions, forecasting project timelines, or analyzing customer churn, your data stays safe, private, and fully under your control.



Easy Configuration and Deployment

With Easy Configuration and Deployment, you can set up and manage ML models without worrying about complicated coding or data science expertise. The solution leverages pre-packaged Azure applications that contain all the necessary resources—ensuring that your predictive environment is ready to go with minimal effort.

Whether you are creating models for leads, opportunities, or custom CRM entities, the setup process guides you through every step, from selecting relevant data columns to activating automated prediction triggers. This reduces configuration time from hours to minutes and empowers teams to focus on leveraging actionable insights rather than wrestling with technical setup.

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LeadClassificationModel - Saved
Predict AI Model

General Prediction Settings AI Model Jobs Related

Model name
LeadClassificationModel

Select a table to predict
Lead

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>
```

LeadClassificationModel - Saved
Predict AI Model

General Prediction Settings AI Model Jobs Related

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">
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    <attribute name="fullname" />
    <attribute name="createdon" />
    <attribute name="statuscode" />
    <attribute name="subject" />
  </entity>
</fetch>
```

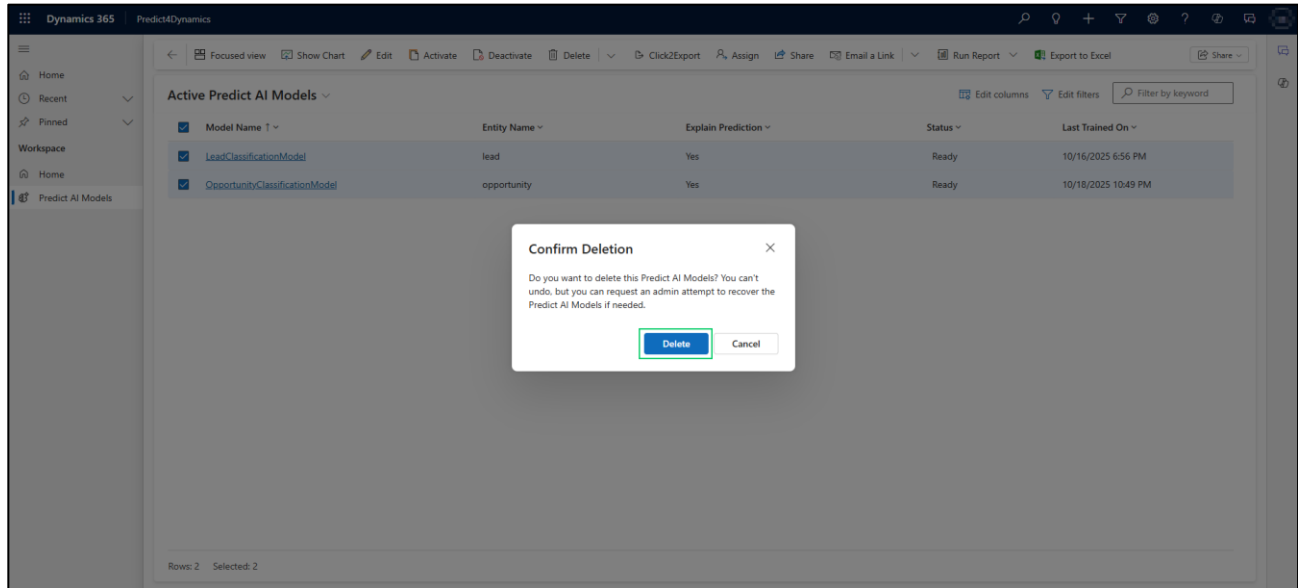
Select columns that influence the prediction
Preferred Method of Contact, Rating, Topic, Annual Revenue, Currency, Customer, Industry, Job Title, Lead Source, No. of Employees

Select a column to predict
Status

Uninstallation

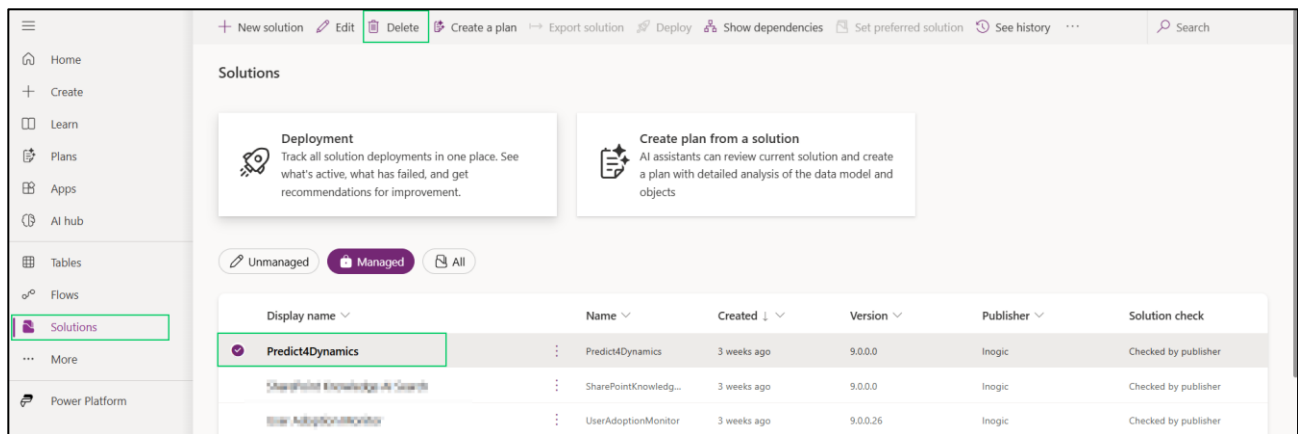
To uninstall the solution, go to the Predict4Dynamics app and go to the PredictAIModel entity and delete all the records from that entity. (This step is mandatory).

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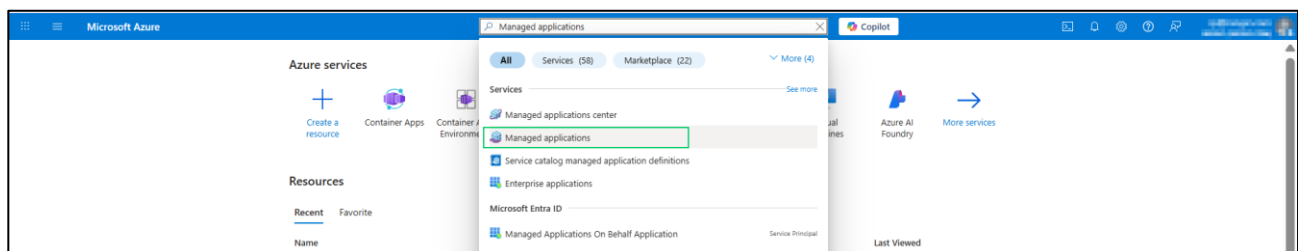
After all the records are deleted then go to the [Power Apps](#).

Select your environment and then go to **solution > managed >** and select the **Predict4Dynamics** solution and click on the delete button, and wait for some time, it will going to delete the Predict4Dynamics solution from your environment

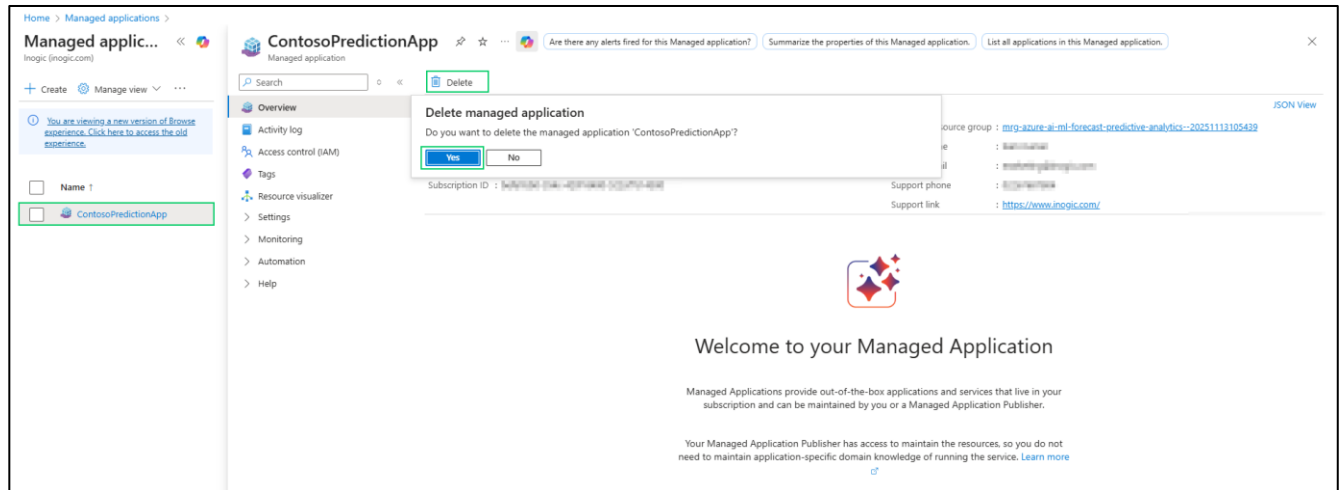


Steps to delete the InoWiz Prediction Builder

First, go the the [Azure Portal](#) and search for the managed application and click on it.



Open the managed application and then click on delete button and prompted yes button. It will take some time and remove the InoWiz Prediction Builder application from your azure subscription.



CONTACT US

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