



Predict4Dynamics

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White Paper

Predict4Dynamics - Whitepaper

Aim

Predict4Dynamics is designed to transform how organizations use data within Dynamics 365 CRM by embedding ML-driven predictive analytics directly into everyday workflows. It enables businesses to move from reactive to proactive decision-making by forecasting key outcomes such as lead conversions, revenue potential, churn risk, and service demand.

By integrating seamlessly with Azure Machine Learning and Azure OpenAI, Predict4Dynamics empowers users to create, train, and deploy predictive models with ease—without requiring coding or data science expertise. It goes beyond standard CRM forecasting by offering explainable AI, so users not only see predictions but also understand the reasoning behind them.

Built as a secure, tenant-isolated solution, Predict4Dynamics ensures that all AI processing and data remain within your organization's Azure environment. This guarantees compliance, privacy, and control—while enabling scalable, real-time predictions across CRM entities such as Leads, Opportunities, Cases, and Projects. In short, Predict4Dynamics helps organizations unlock the power of trusted, transparent, and cost-effective AI—right inside Dynamics 365 CRM.

Features

- Get started instantly with ready-to-use predictive models tailored for common CRM entities.
- Extensive Coverage for OOB and Custom Entities to extend predictive analytics to any CRM entity or business module with ease.
- Train and manage multiple predictive models for each entity to handle diverse segments and scenarios.

- Generate predictions automatically when records are created or updated for real-time insights.
- Configure and fine-tune models by selecting relevant data columns and filters that match your business logic.
- Understand the “why” behind each prediction with contextual, human-readable explanations.
- Control the tone, depth, and style of AI explanations using administrator-defined prompts.
- Keep all AI, ML, and OpenAI resources within your Azure tenant to maintain compliance and data privacy.
- Deploy models effortlessly with a guided setup and preconfigured Azure applications.

Supported Versions

Versions: Microsoft 365, Power Platform, & Dataverse.

Deployment Models: Online.

Who needs it?

Predict4Dynamics is ideal for organizations using Dynamics 365 CRM that want to move from reactive decision-making to proactive, AI-driven planning. Sales leaders can forecast revenue more accurately, identify high-potential leads, and prioritize deals that are most likely to close. Marketing teams can predict campaign outcomes and optimize lead nurturing strategies. Service managers can anticipate customer churn and plan retention efforts in advance.

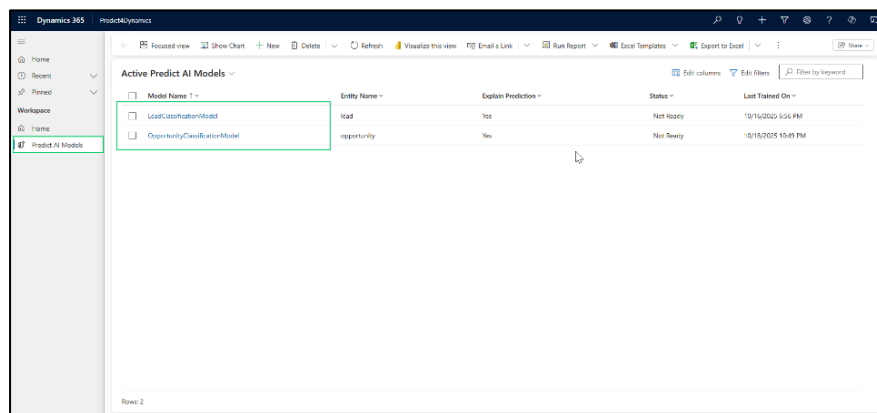
For CRM administrators and business analysts, the platform eliminates the complexity of building AI models from scratch — offering ready-to-use predictive intelligence with complete explainability and control.

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By integrating directly into Dynamics 365, Predict4Dynamics empowers every user — from executives to field reps — to make smarter, faster, and more confident decisions backed by data-driven predictions.

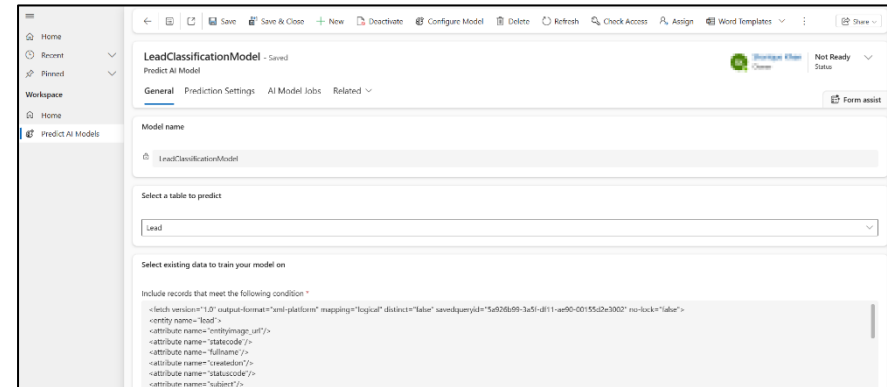
Ready-to-Use Sample Models for Leads and Opportunities

Understands user intent and retrieves accurate information from SharePoint documents, even without exact keywords.



The screenshot shows the Dynamics 365 Predict4Dynamics interface. On the left, there's a sidebar with 'Home', 'Recent', 'Pinned', 'Workspace', and 'Predict AI Models'. 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 'lead' and 'OpportunityClassificationModel' for 'opportunity'. Both are 'Not Ready'.

Model Name	Entity Name	Explain Prediction	Status	Last Trained On
LeadClassificationModel	lead	Yes	Not Ready	10/15/2025 5:56 PM
OpportunityClassificationModel	opportunity	Yes	Not Ready	10/15/2025 5:56 PM

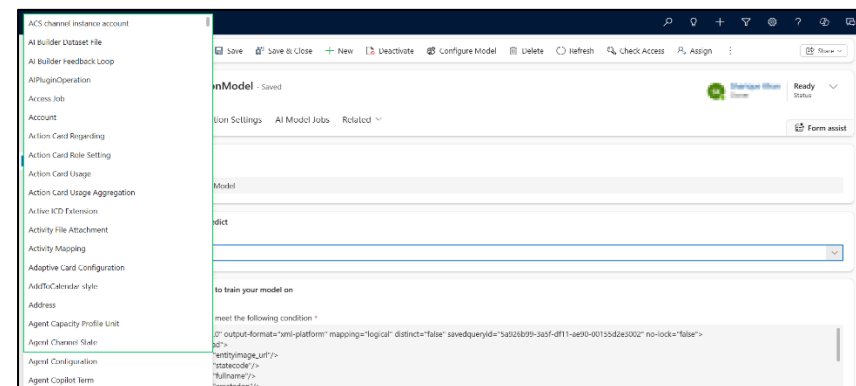


The screenshot shows the configuration page for the 'LeadClassificationModel'. It includes tabs for 'General', 'Prediction Settings', 'AI Model Jobs', and 'Related'. The 'General' tab is active, showing the model name 'LeadClassificationModel'. Below, there's a section 'Select a table to predict' with a dropdown menu set to 'Lead'. Another section 'Select existing data to train your model on' contains a JSON query:

```
<?xml version='1.0' output-format='xml-platform' mapping='logical' distinct='false' savedqueryid='34020859-3a51-df11-ae90-00155d2e3002' no-lock='false'>
  <fetch name='lead'>
    <entity name='entityimage_uif' />
    <attribute name='statecode' />
    <attribute name='fullname' />
    <attribute name='createddatetime' />
    <attribute name='statuscode' />
    <attribute name='subject' />
  </fetch>
```

Extensive Coverage for OOB and Custom Entities

Ask natural language questions and get unified, contextual answers synthesized across multiple SharePoint documents.



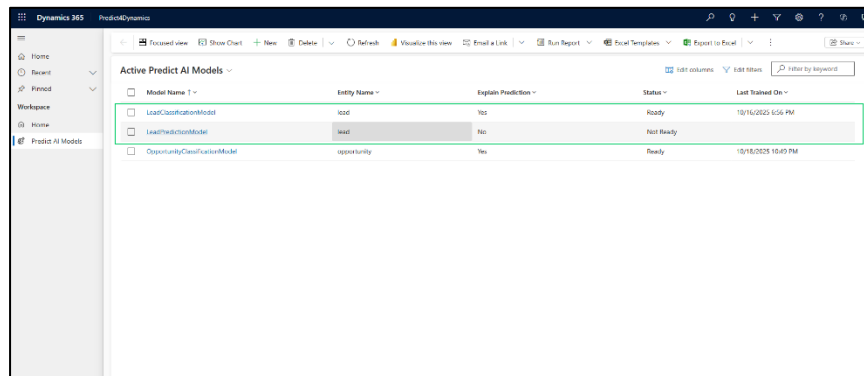
The screenshot shows the 'Agent Configuration' page for the 'LeadClassificationModel'. It includes tabs for 'General', 'Prediction Settings', 'AI Model Jobs', and 'Related'. The 'General' tab is active, showing the model name 'LeadClassificationModel'. Below, there's a section 'Select a table to predict' with a dropdown menu set to 'Lead'. Another section 'Select existing data to train your model on' contains a JSON query:

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<?xml version='1.0' output-format='xml-platform' mapping='logical' distinct='false' savedqueryid='34020859-3a51-df11-ae90-00155d2e3002' no-lock='false'>
  <fetch name='lead'>
    <entity name='entityimage_uif' />
    <attribute name='statecode' />
    <attribute name='fullname' />
    <attribute name='createddatetime' />
  </fetch>
```

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Leveraging Multiple Predictive Models for each Entity

Get accurate answers with source references, making it easy to trace information back to original documents.

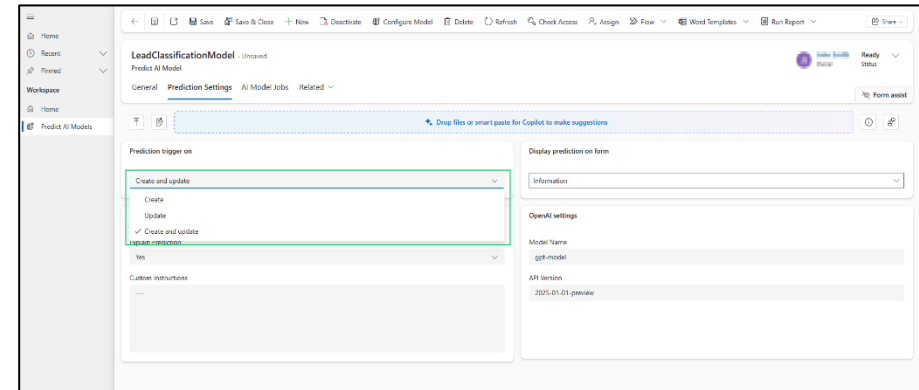


The screenshot shows the Dynamics 365 Predict4Dynamics interface. On the left, there's a sidebar with 'Home', 'Recent', 'Pinned', 'Workspace', and 'Predict AI Models'. The main area displays a table titled 'Active Predict AI Models'. The table has columns: Model Name, Entity Name, Explain Prediction, Status, and Last Trained On. Three models are listed: LeadClassificationModel (Entity: lead, Status: Ready, Last Trained On: 10/16/2025 5:36 PM), LeadPredictionModel (Entity: lead, Status: Not Ready, Last Trained On: 10/16/2025 5:36 PM), and OpportunityClassificationModel (Entity: opportunity, Status: Ready, Last Trained On: 10/16/2025 10:40 PM). The first two rows are highlighted with a green border.

Model Name	Entity Name	Explain Prediction	Status	Last Trained On
LeadClassificationModel	lead	Yes	Ready	10/16/2025 5:36 PM
LeadPredictionModel	lead	No	Not Ready	10/16/2025 5:36 PM
OpportunityClassificationModel	opportunity	Yes	Ready	10/16/2025 10:40 PM

Seamless Prediction Automation & Triggers

Simplify deployment with ready-to-use settings that reduce complexity and save time.



The screenshot shows the configuration page for the 'LeadClassificationModel'. The page has tabs for 'General', 'Prediction Settings', 'AI Model Jobs', and 'Related'. The 'Prediction Settings' tab is active. It contains sections for 'Prediction trigger on', 'Display prediction on form', and 'OpenAI settings'. The 'Prediction trigger on' section has a dropdown menu with options: 'Create and update', 'Create', 'Update', 'Create and update', and 'Update instructions'. The 'Display prediction on form' section has a dropdown menu with the option 'Information'. The 'OpenAI settings' section includes fields for 'Model Name' (gpt-4o), 'API Version' (2025-01-01-preview), and 'Custom Instructions'.

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:

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Model Customization

Ensure search results fully respect native SharePoint permissions, so users only see authorized data.

The screenshot shows the 'LeadClassificationModel' configuration page. It includes a sidebar with navigation options like Home, Recent, Pinned, and Predict AI Models. The main area is titled 'Select existing data to train your model on' and contains a JSON query for filtering records. Below this, there are sections for 'Select columns that influence the prediction' and 'Select a column to predict'.

```
<?xml version="1.0" output="format="xml platform="logical" distinct="false" cascadequeryid="5a20699-3c5f-df11-ea50-00155d2002" no-lock="false">
  <entity name="lead">
    <attribute name="entityimageurl"/>
    <attribute name="statuscode"/>
    <attribute name="lastname"/>
    <attribute name="createdon"/>
    <attribute name="statuscode"/>
    <attribute name="subject"/>
  </entity>
</?xml>
```

Explainable AI with Azure OpenAI

Ensure search results fully respect native SharePoint permissions, so users only see authorized data.

The screenshot shows the 'Prediction Settings' tab for the 'LeadClassificationModel'. It includes sections for 'Prediction trigger on' (set to 'Create and update'), 'Display prediction on form' (set to 'Lead'), 'Prediction explainability settings' (set to 'Yes'), and 'OpenAI settings' (Model Name: gpt-model, API Version: 2023-01-01-preview).

The screenshot shows the 'Summary' tab for a lead named 'John Thomas'. It includes a 'Prediction Summary' section with a score of 83.02, a 'PREDICTION SUMMARY' section, a 'FINAL CONCLUSION' section, and a 'POSITIVE FACTORS' section. The 'POSITIVE FACTORS' section lists several factors that support the lead's qualification, such as revenue, financial stability, and a reputable lead source.

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.

Configurable Prompt Templates for Insightful Explanations

Ensure search results fully respect native SharePoint permissions, so users only see authorized data.

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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.

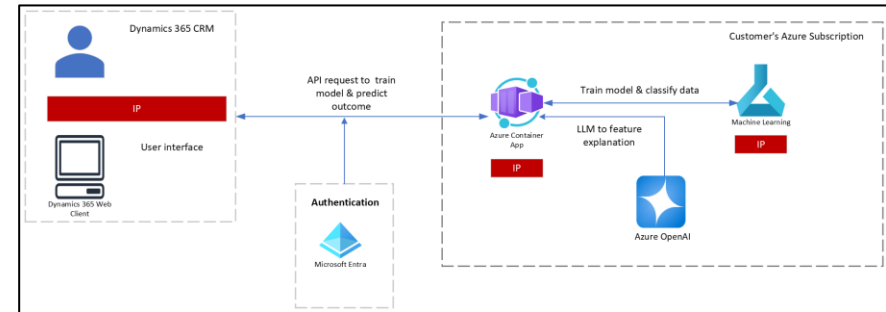
FINAL CONCLUSION:

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.

[Show Less](#)

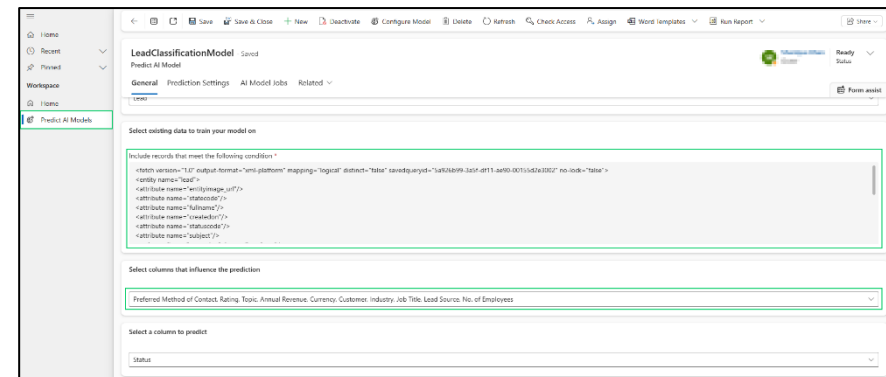


Easy Configuration and Deployment

Ensure search results fully respect native SharePoint permissions, so users only see authorized data.

Scalable and Secure Tenant Isolation Framework

Predict4Dynamics uses a Scalable and Secure Tenant Isolation Framework to guarantee that all ML operations and data remain securely contained within your environment, ensuring complete control, compliance, and privacy.



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