

Microsoft Dynamics 365 Sales

CRM QUICK START PACKAGE

Get started with a market-leading CRM quickly with minimum investment!





No matter whether you're an established SME or an organisation looking to move away from spreadsheet-based processes, you can get up-and-running with Dynamics 365 Sales easily using our fixed-cost quick start packages.

Help your sales teams work more efficiently from a comprehensive solution that provides all the necessary tools to build better relationships and close more deals.

Experience the benefits of Dynamics 365 first-hand, then scale up the solution as your business requirements evolve.



Everything you need

Our quick start package enables you to get started as quickly as possible, with everything included at a fixed cost of **£6999**



**5 Full User
Licenses**

(First month subscription)



**System
Configuration**



**6 Dashboards
& Reports**



**Training &
Support**



**Access to
Copilot AI**



**Microsoft
Teams Calling**





Why choose Dynamics 365 CRM?

1

Familiar User Interface

Navigate the system with ease with a seamless experience across devices—with a UI based on your everyday Microsoft productivity tools.

2

Productivity Enhancements

Feel your productivity soar with comprehensive functionality to manage your pipeline, keep data secure, and close deals faster.

3

AI Copilot driven selling

Leverage AI and Machine Learning to provide actionable insights, such as sales forecasting, lead prioritisation, and predictive analytics.

4

Scalable Solution

Grow and extend the solution to your exact business requirements, with customisations, extensions, and integrations to suit your needs.



Why choose Quick Start?

We understand that not everyone is familiar with the advantages of a CRM system, and many businesses are hesitant to invest heavily upfront. That's why **our Quick Start package offers everything you need at a single, fixed cost**, allowing you to get started without breaking the bank.

Drawing on our experience working with organisations across various industries, we know that transitioning to a dedicated CRM can feel daunting. Our goal is to help you begin your Dynamics 365 journey with ease, offering a straightforward service with no hidden costs.

Get started with the solution in 10 days and expand it as your business grows. Plus, our expert consultants will guide you through how we can tailor the system to support your specific business goals and evolving needs.



Quick Start Package Options

Feature	Starter	Advanced
Standard Services		
Environment Provision	✓	✓
Configure Out the Box (OOB) Dynamics 365	✓	✓
Standard Dashboard and Reports 1) Sales Activity Dashboard 2) Sales Performance Dashboard 3) Sales Dashboard 4) Sales Accelerator 5) Sales Pipeline and Funnel 6) Sales Usage Report	✓	✓
Standard enablement of D365 and SharePoint Integration for Document Management for account, contact, Lead, Opportunity and Quote entities only	✓	✓
Standard Configuration of Core Entities - audit, mandatory field, field placement on forms.	✓	✓
Set-up, testing & training of mailbox setup along with Outlook integration	✓	✓
Documentation	Learn Link	Learn Link, FSD, TDD
Free post go-live Hyper Care support	2 Days	5 Days

Feature	Starter	Advanced
Copilot - Record updates, Email and meeting assistance, Opportunity summaries	✓	✓
Customisation as per business needs	✗	✓
Custom Security role	2	As per design
Data Migration From existing system – standard template for account, contact, and leads will be shared on day one.	Standard Templates in Excel	As per design
Custom fields in OOB tables/entity – Restricted to Leads, Opportunity, Account and Contact.	5 fields / Entity	As per design
Core user training (5 Full Users): 1) Personal settings, 2) Navigation of the system, 3) Standard Sales flow of the system, 4) View creation, 5) Dashboard creation, 6) Product Creation, 7) Sales Goal	12 Hours	As per Project Plan
Admin training (2 User): 1) Security role assignment and user setup. 2) Data Upload using a template. 3) Email template configuration. 4) Personalise dashboard and views.	4 Hours	8 Hours



Quick Start Package Options

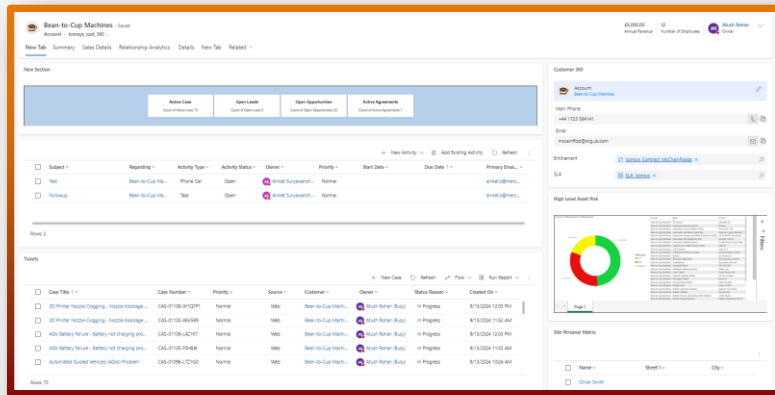
Feature	Starter	Advanced
Standard Services		
Teams Telephone Integration	✓	✓
Organisation chart for Customer, Opportunity Pipeline	✓	✓
Sales accelerator and sales usage reports	✓	✓
Goals and Forecasting	✗	✓
Out-the-box Integration with Business Central for entities– 1) Account/Customer - Bidirectional 2) Opportunity - Unidirectional - CRM to BC 3) Product - Unidirectional - BC to CRM 4) Order - Unidirectional - CRM to BC 5) Pricelist - Unidirectional - BC to CRM	✓	✓

Feature	Starter	Advanced
Dashboards & Reports		
Third-Party Integration	✗	✓
Custom Dashboard	✗	As per design
Power BI	✗	As per design
SSRS Report	✗	As per design
Go-Live	10 Days	As Per Project Plan



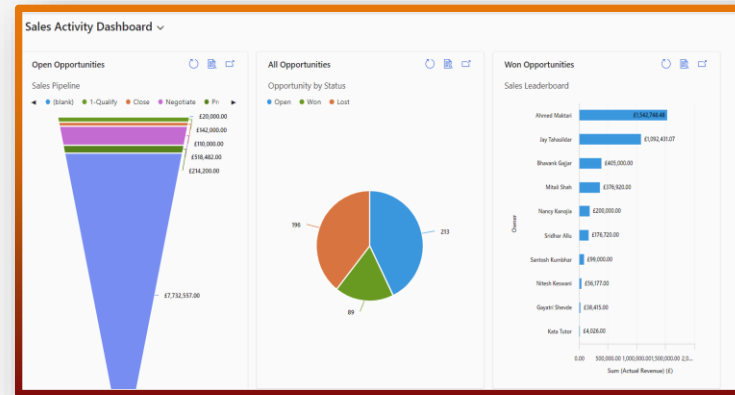
Microsoft Dynamics 365 Sales

Comprehensive functionality to help your teams succeed



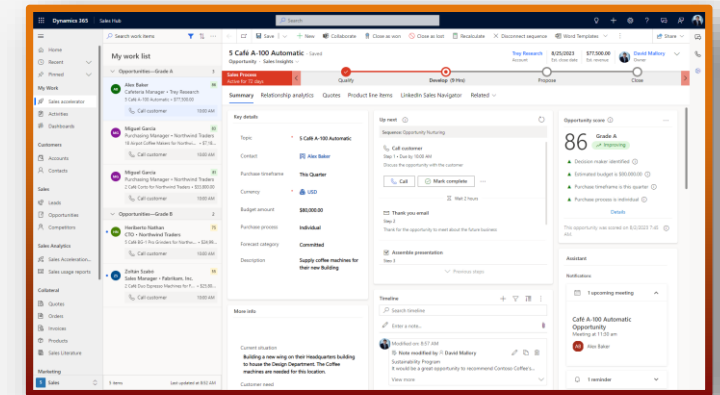
Accounts & Contacts

Manage all your customer information in one place.



Sales Pipeline & Funnel

Easily track and manage leads through the sales funnel



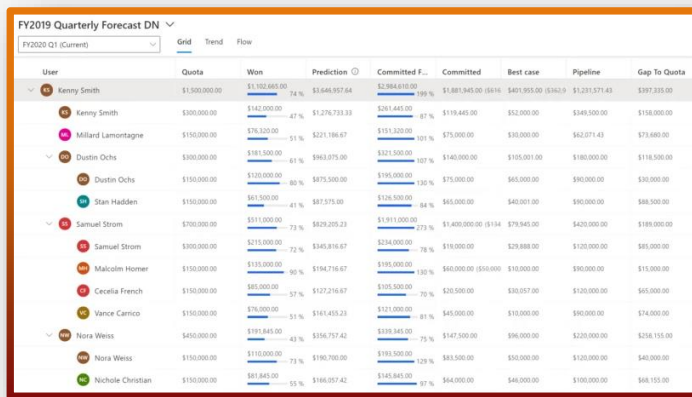
Opportunity Management

Monitor each stage of the sales process, track interactions, and forecast outcomes.



Microsoft Dynamics 365 Sales

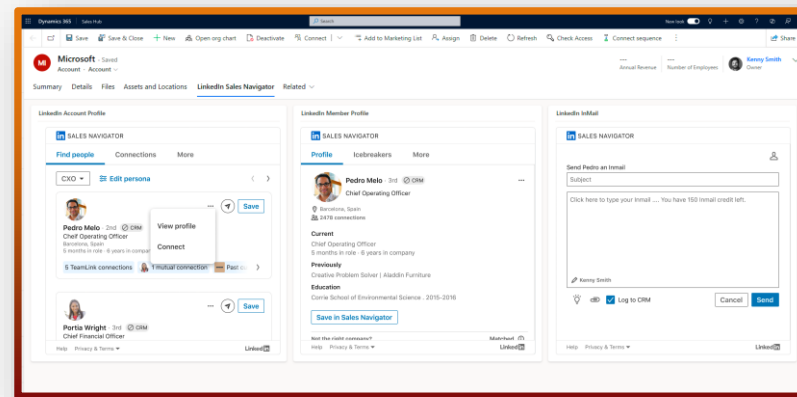
Comprehensive functionality to help your teams succeed



User	Quota	Won	Prediction	Committed F...	Committed	Best case	Pipeline	Gap To Quota
Kenny Smith	\$1,500,000.00	\$1,420,000.00	\$1,276,733.33	\$2,564,810.00	\$1,881,945.00 (\$916	\$401,955.00 (\$342.0	\$1,231,571.43	\$397,235.00
Millard Lamontagne	\$150,000.00	\$76,320.00	\$221,186.67	\$151,320.00	\$75,000.00	\$30,000.00	\$42,071.43	\$71,680.00
Dustin Ochs	\$300,000.00	\$181,500.00	\$463,075.00	\$321,500.00	\$140,000.00	\$105,001.00	\$180,000.00	\$116,500.00
Dustin Ochs	\$150,000.00	\$109,000.00	\$275,300.00	\$109,000.00	\$75,000.00	\$90,000.00	\$30,000.00	\$30,000.00
Stan Hadden	\$100,000.00	\$61,500.00	\$87,575.00	\$136,500.00	\$65,000.00	\$40,001.00	\$90,000.00	\$88,500.00
Samuel Strom	\$700,000.00	\$311,000.00	\$629,205.23	\$1,911,000.00	\$1,400,000.00 (\$154	\$79,545.00	\$420,000.00	\$189,000.00
Samuel Strom	\$300,000.00	\$215,000.00	\$345,816.67	\$234,000.00	\$19,000.00	\$29,888.00	\$120,000.00	\$81,000.00
Malcolm Homer	\$150,000.00	\$135,000.00	\$194,716.67	\$195,000.00	\$60,000.00 (\$50,000	\$10,000.00	\$90,000.00	\$15,000.00
Cecelia French	\$150,000.00	\$60,000.00	\$127,216.67	\$105,500.00	\$20,000.00	\$30,057.00	\$120,000.00	\$65,000.00
Vance Carico	\$150,000.00	\$76,000.00	\$163,453.23	\$121,000.00	\$81,000.00	\$45,000.00	\$90,000.00	\$74,000.00
Nora Weiss	\$450,000.00	\$191,845.00	\$196,757.42	\$339,345.00	\$147,500.00	\$96,000.00	\$220,000.00	\$278,155.00
Nora Weiss	\$150,000.00	\$110,000.00	\$190,700.00	\$193,500.00	\$83,500.00	\$50,000.00	\$120,000.00	\$40,000.00
Nichole Christian	\$150,000.00	\$81,845.00	\$168,057.42	\$145,845.00	\$64,000.00	\$40,000.00	\$100,000.00	\$68,155.00

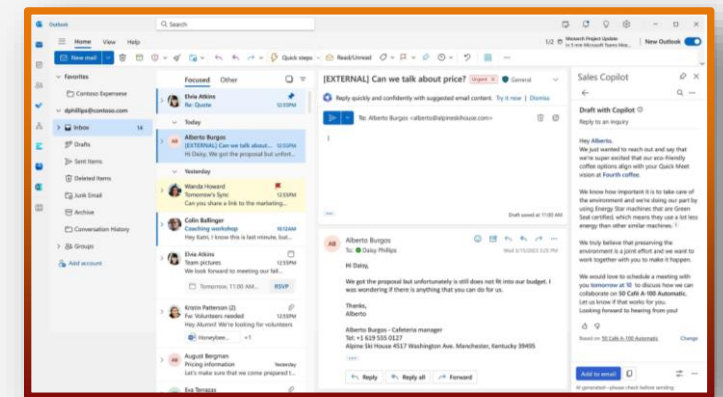
Predictive Analytics & Forecasting

Leverage AI insights to predict sales outcomes, identify trends, and forecast revenue



LinkedIn Sales Navigator

Build relationships, discover new leads, and gain valuable insights to enhance outreach efforts.



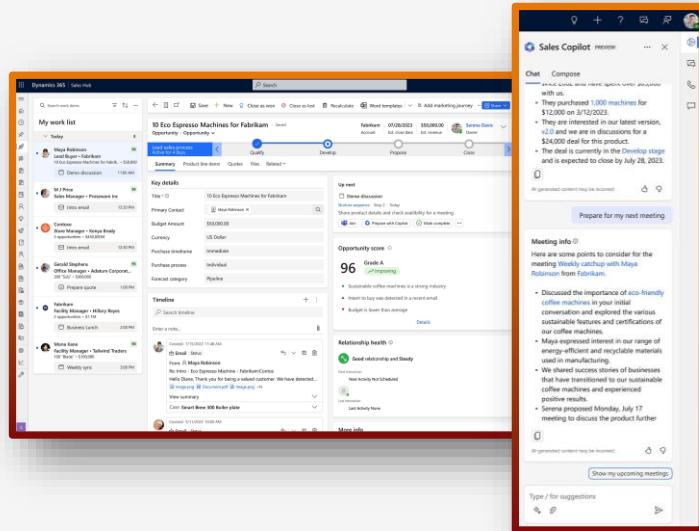
Integration with Office 365

Work seamlessly with familiar Microsoft tools like Outlook, Excel, and Teams



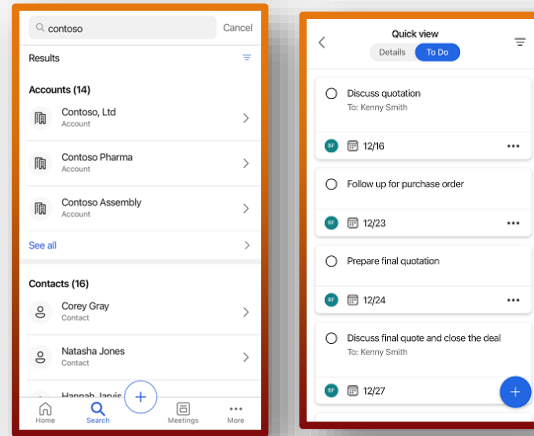
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Comprehensive functionality to help your teams succeed



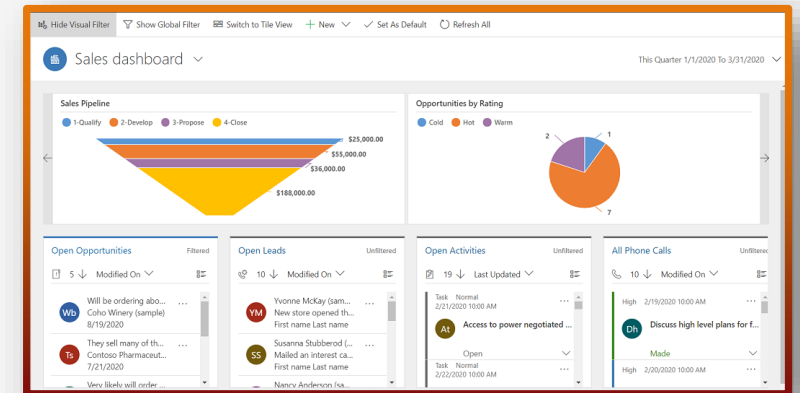
AI Copilot

Assists sales teams with intelligent recommendations & automating tasks



Mobile Accessibility

Leverage AI insights to predict sales outcomes, identify trends, and forecast revenue



Dashboards & Reports

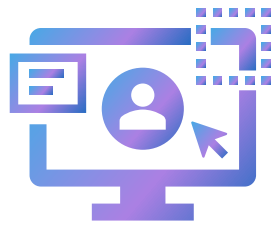
Track progress, analyse trends, and make informed decisions, driving continuous improvement



Training & Support from Day 1

Implementing a solution is one thing, but without adequate training and support, you're not going to get the full benefits of using it.

Our offer includes comprehensive training for core users and admin training to ensure you're set up for success from day 1.



**12 Hours User
Training**



**2 Days
Hyper Support**



Customer Success

Don't just take our word for it, see how we've helped numerous customers across industries.

Case Study:
Air Business Ltd

Case Study:
Optilan

Case Study on
Dynamics 365 Sales



Thank You

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