

Summary

Dynamics 365 allows users to store and manage all data in one system. This solution can integrate with other Microsoft products and perfectly fits customer business needs. OntargIT expanded Dynamics 365 capabilities and prepared specialized self-efficient solution for distributors.

Description

OntargIT Dynamics 365 Sales for distributors is a specialized solution that simplifies the management of basic and related sales processes.

The solution helps distributors, integrators, dealers and resellers to automate business processes of varying complexity: from wholesale or projects on site implementation sales to personalized sales with a relatively long cycle.

- All data on specialists, clients and leads in one system;
- Convenient and functional process of acquiring a new client;
- Expanded support for business processes;
- Events creation and management, audience analysis;
- Automation of contract creation and management of already concluded contracts

Typical stages of implementation

Week 1, 2. Analysis of current processes and data sources, main problems and wishes for a future product: meetings with key process owners (marketing, sales, CFO, IT). Modeling of functionality, coordination of final requirements. High involvement of key specialists from the customer is required

Week 3. Adding the necessary objects and fields. Customization and refinement of the existing functionality of the forms: Interests, Clients, Products, Deals

Week 4. Adaptation and customization of the business process

Week 5. Development of printed forms, setting up access for user roles

Week 6. Loading initial data, training key users

Week 7. Acceptance testing, final improvements based on testing results