



TruNorth Dynamics Unlocked for Dynamics 365 Sales

Assumptions

- Licensing has been purchased and installed.
- It must be completed within two weeks. Anything beyond the two weeks will be a change request to add hours.
- TruNorth Dynamics has Power Platform Administrator access.

Inclusion/Exclusions

The assumptions for the fixed rate project are as follows.

1. All sessions are scheduled up front. This keeps the scope limited and the timeframe short.
2. Project Management
 - a. 3 hours of PM time to manage the project.
3. Internal Setup
 - a. 2 hours for setting up and prepping the environments.
 - i. Create production and sandbox environments.
4. Working Sessions
 - a. Working with a TruNorth consultant.
 - b. 2 hours for user setup and security group setup
 - i. Add users to the Production Environment.
 - ii. Adding users to the existing Sales Professional and Sales Manager Security Roles.
 - iii. Does not include creating custom Security Roles.
 - iv. Setting up the mailboxes for the users created.
 - c. 1 hour on how to import data, using Excel imports.
 - i. One sample import.
 - d. 2 hours of customizing Model-Driven Apps and Model-Driven Forms
 - i. Limited to the tables in the Dynamics Unlocked for Sales Solution
 1. Account
 2. Contact
 3. Lead
 4. Opportunity
5. Training
 - a. End-User Training: 5 hours of high-level user training will be completed on:
 - i. Navigation
 - ii. Personal Views
 - iii. Tracking Email
 - iv. Assignment of Account Ownership
 - v. Activating/Deactivating Records
 - vi. The Sales Lifecycle



- b. Admin Training: 2 hours of training will be completed on:
 - i. Security
 - ii. Setting up Mailboxes
 - iii. Audit
 - iv. Onboarding/Offboarding Users
 - c. Additional support, if required, will be processed as a support ticket.
 - d. There will be a post-training meeting to transition to your Client Success Manager.
6. To ensure success in the future, a support contract is recommended, but not required.

Exclusions

Does not include creating or modifying Power Automate Flows.

Does not include creating or modifying Dataverse Plugins.