



Thanks for your interest in SOS for D365!

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General Info About SOS for D365:

Setup should take about 10-15 minutes. SOS for D365 Info can be found [here](#).

SOS for D365 has 5 key sections: Opportunity Qualification, Competitive Strategy, Political Landscape, Value Proposition and Action Planning. After installation you will have **14 days free access to Opportunity Qualification only:**

- The "Snapshot" with the 9 key Qualification Criteria.
- **Please [contact us](#) to receive access to the other sections**

The SOS for D365 App can be used immediately by Sales Professionals who have been trained on the SOS Methodology. **Others may not be able to intuitively use it without a bit of training.**

- **As with any tool, the real impact and value for Sales Teams only comes with proper training.**
- Even if you try to use it on your own without training, you are most likely missing out on the real power of the methodology and process.
- Therefore, we strongly recommend that you take the accompanying training.
- Many aspects of the training are useful for Sales Professionals even when not using the App.
- For more information on training please [click here](#).

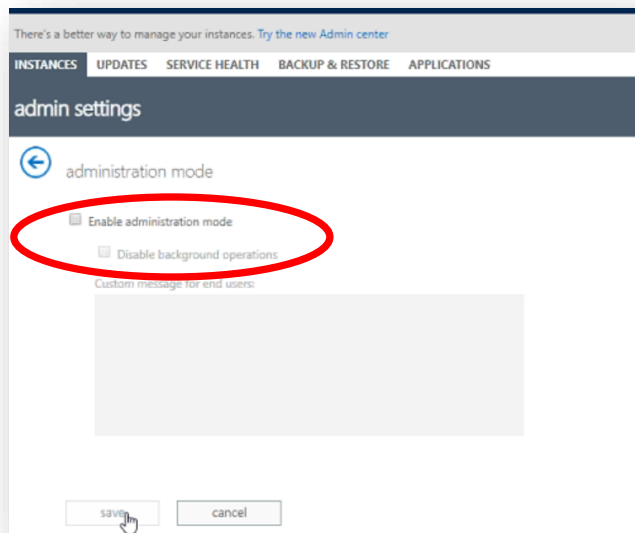
The App is fully integrated with D365 to take advantage of Contacts/Influencers, Activities/ Actions, Competitors/Strategy in the context of the Opportunity

Please fill out [contact form](#) for more information or for pricing.

1. Pre-Requisites

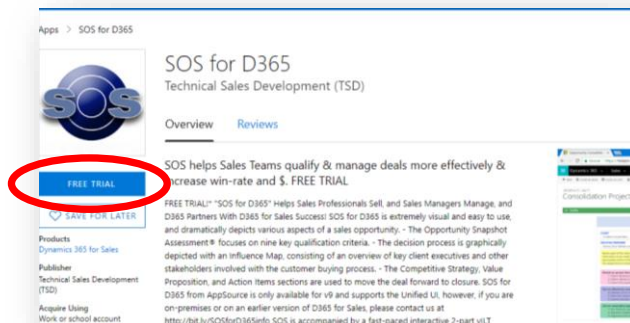
Dynamics 365 with User with **System Administrator** Role for Dynamics 365

If you are installing on a Sandbox (test) environment, please **MAKE SURE THAT ADMINISTRATION MODE** and **DISABLE BACKGROUND OPERATIONS** are both **DESELECTED**:



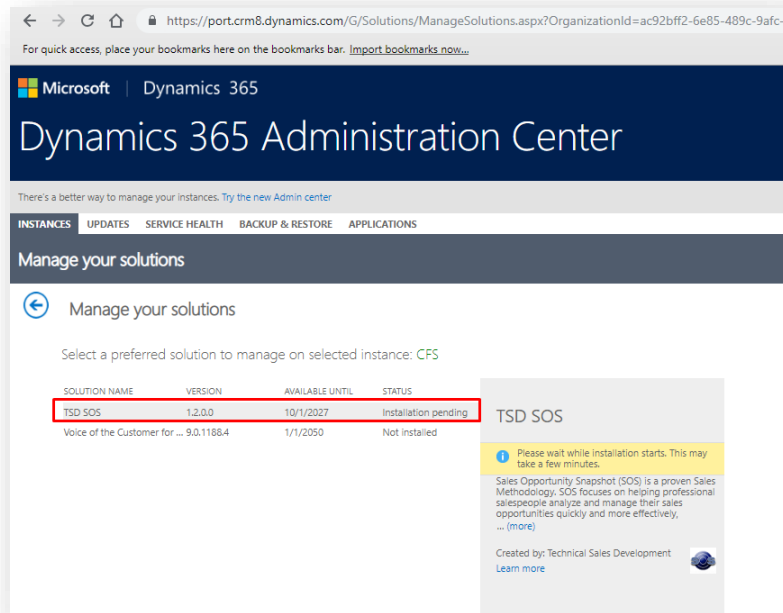
2. Install SOS for D365 from AppSource

- Navigate to the [SOS for D365 AppSource Page](#)
- Click on "FREE TRIAL"



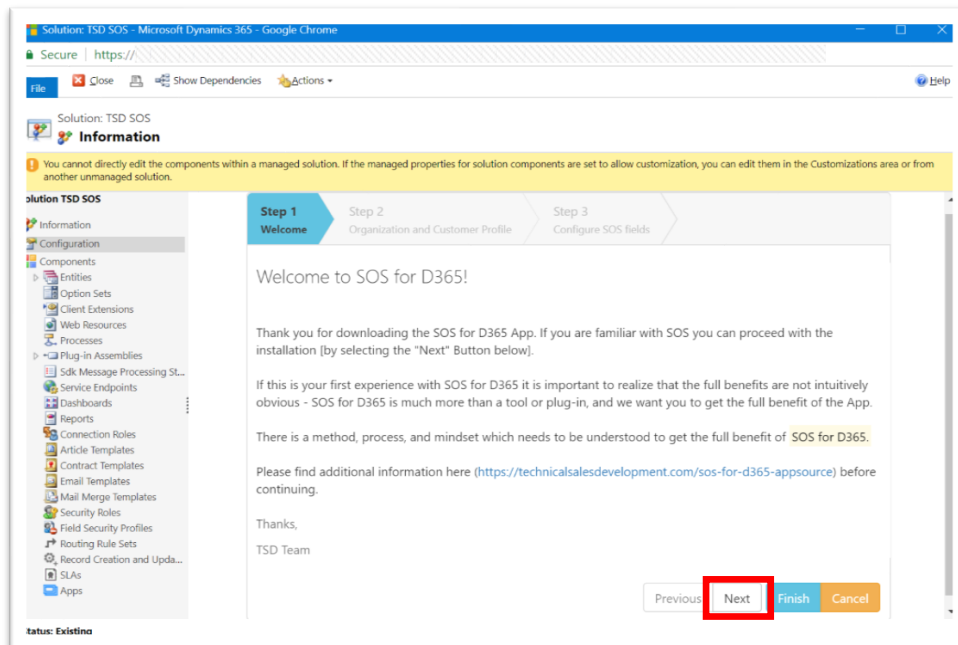
- Fill in the Microsoft Form to continue
- Sign in with your Admin enabled D365 Login
- Select the Organization to which you want to add the App

- f. Wait while Dynamics 365 installs the App



3. Configure SOS Solution – Step 1 - Welcome

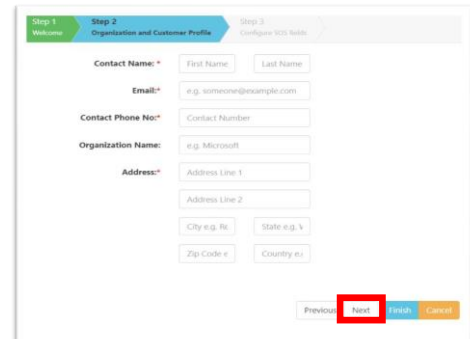
- a. Once the solution is installed, you need to configure the solution to start using it
 b. Navigate to **Settings > Solutions** and Open Solution - **"TSD SOS"**. You will see Configuration screen like this:



- c. Please read carefully. See [Additional Information](#) regarding Installation instructions for V9 Unified Interface if you are using it.
- d. Then click **“Next.”**
- e. **If this is your first installation you will be given access to Part 1 (The Snapshot) of the 5 parts of the solution, for 14 Days.** To get access to the other sections and to extend usage past 14 Days, please [contact us](#).

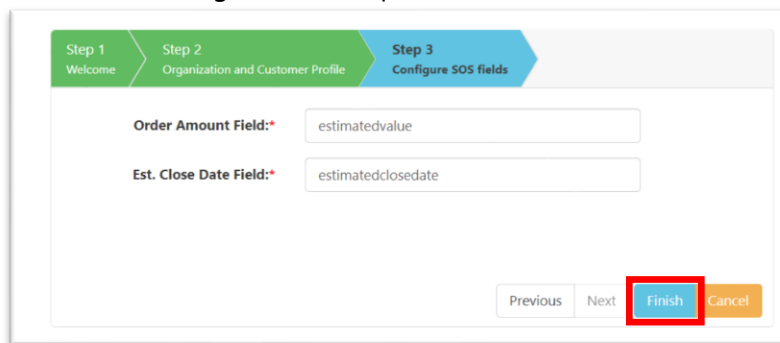
4. Step 2 – Organization and Customer Profile

- a. The Organization and Customer Profile information is required (including Country) to provide you with the 14 Day Trial period and so we can discuss your needs, give access to the other parts of the SOS for D365 solution, and extend the licenses past the trial period. No commitment is required, and your information will only be used for this purpose. Please see our [Privacy Policy](#) regarding how your contact information will be used. When the form is complete, click **“Next.”**



5. Step 3 – Configure Custom Fields

- a. If you use a custom field for **Order Amount** or **Estimated Close Date**, fill in the logical field names you use for the **Order Amount** and **Estimated Close Date**. The default values used by D365 are already filled in, so **if you do not use custom fields, please just leave as-is**. These can be changed later if required.



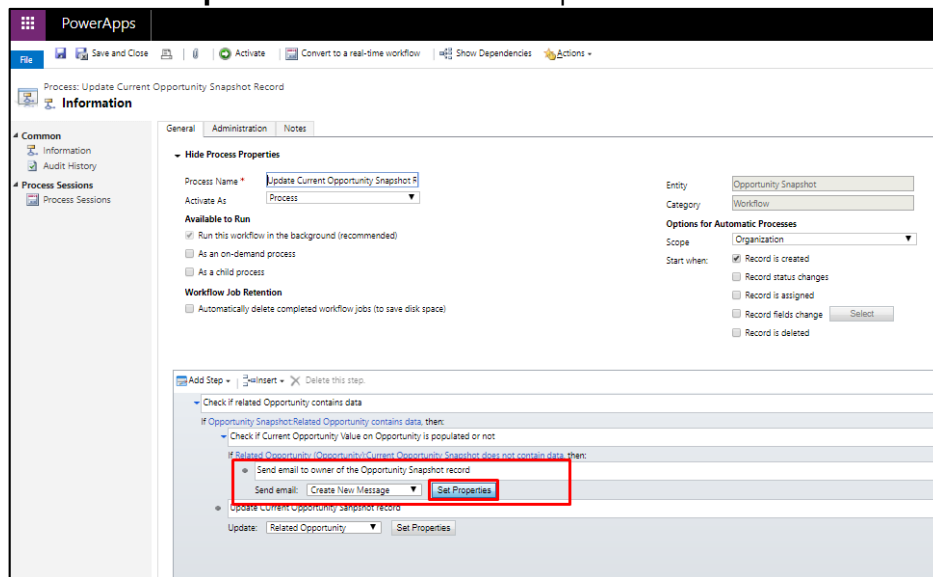
- b. **Click “Finish” (not next)** and wait for the alert indicating configuration is complete. This will take few seconds during which time you will see no change on the form.
- c. **Once the “Configuration Complete” alert is received, the form can be closed.**

6. Assign Security Roles in the Destination Environment

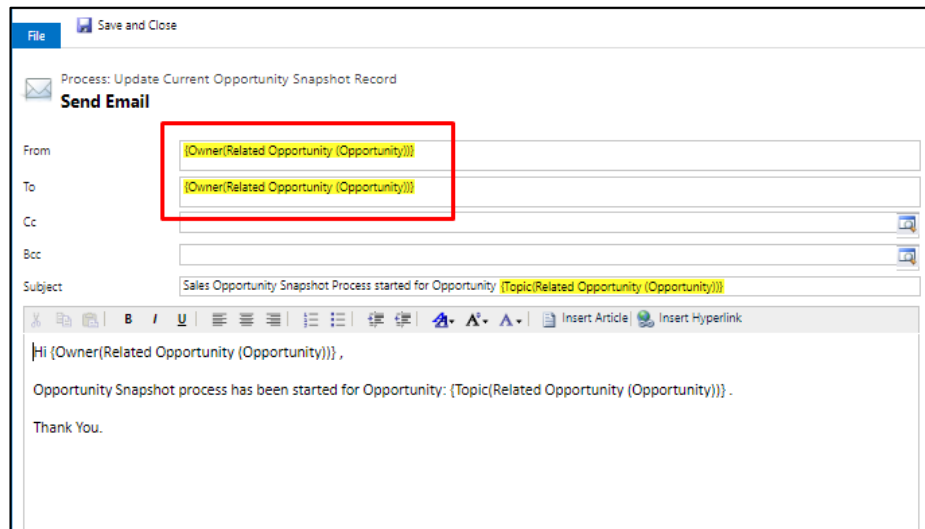
- a. Assign the below security roles for all **owners/authors who are going to use SOS for D365**:
 - i. **Core CRM Role** – Role for basic CRM Access for any user
 - ii. **TSD Sales Person Role**
- b. For Users who need only **read-only access to SOS**, assign the below roles, and **do not assign** the **TSD Sales Person Role**
 - i. **Core CRM Role** – Role for basic CRM Access for any user
 - ii. **TSD View Only Role**

7. Post Installation Steps – SOS Creation Notification

- a. Each time a SOS is created in the D365 system a notification is sent to one or more CRM users for monitoring and management purposes. This step is used to set up the notifications.
- b. We need to edit the email workflow to **change the recipient of SOS creation notifications**.
- c. Navigate to **Settings > Processes**
- d. Open Process Named **“Update Current Opportunity Snapshot Record”**
- e. **Deactivate** the Process if it is currently activated.
- f. Click on **“Set Properties”** in the Send Email step of the workflow as shown below:



- g. Insert desired email recipient(s) in the “From” field and “To” field using CRM users. These CRM Users will be notified every time an SOS is created on an Opportunity.



File Save and Close

Process: Update Current Opportunity Snapshot Record

Send Email

From: {Owner(Related Opportunity (Opportunity))}

To: {Owner(Related Opportunity (Opportunity))}

Cc:

Bcc:

Subject: Sales Opportunity Snapshot Process started for Opportunity: {Topic(Related Opportunity (Opportunity))}

Hi {Owner(Related Opportunity (Opportunity))},

Opportunity Snapshot process has been started for Opportunity: {Topic(Related Opportunity (Opportunity))}.

Thank You.

h. **Save, PLEASE MAKE SURE TO Activate the workflow, then Close the window.**

CONGRATULATIONS YOU HAVE NOW CONFIGURED SOS FOR D365 v9! ENJOY YOUR 14 DAY TRIAL!

8. Configure the Optional v9 Unified Interface

If you are going to configure the Optional v9 Unified Interface, please see the additional installation steps required [HERE](#).