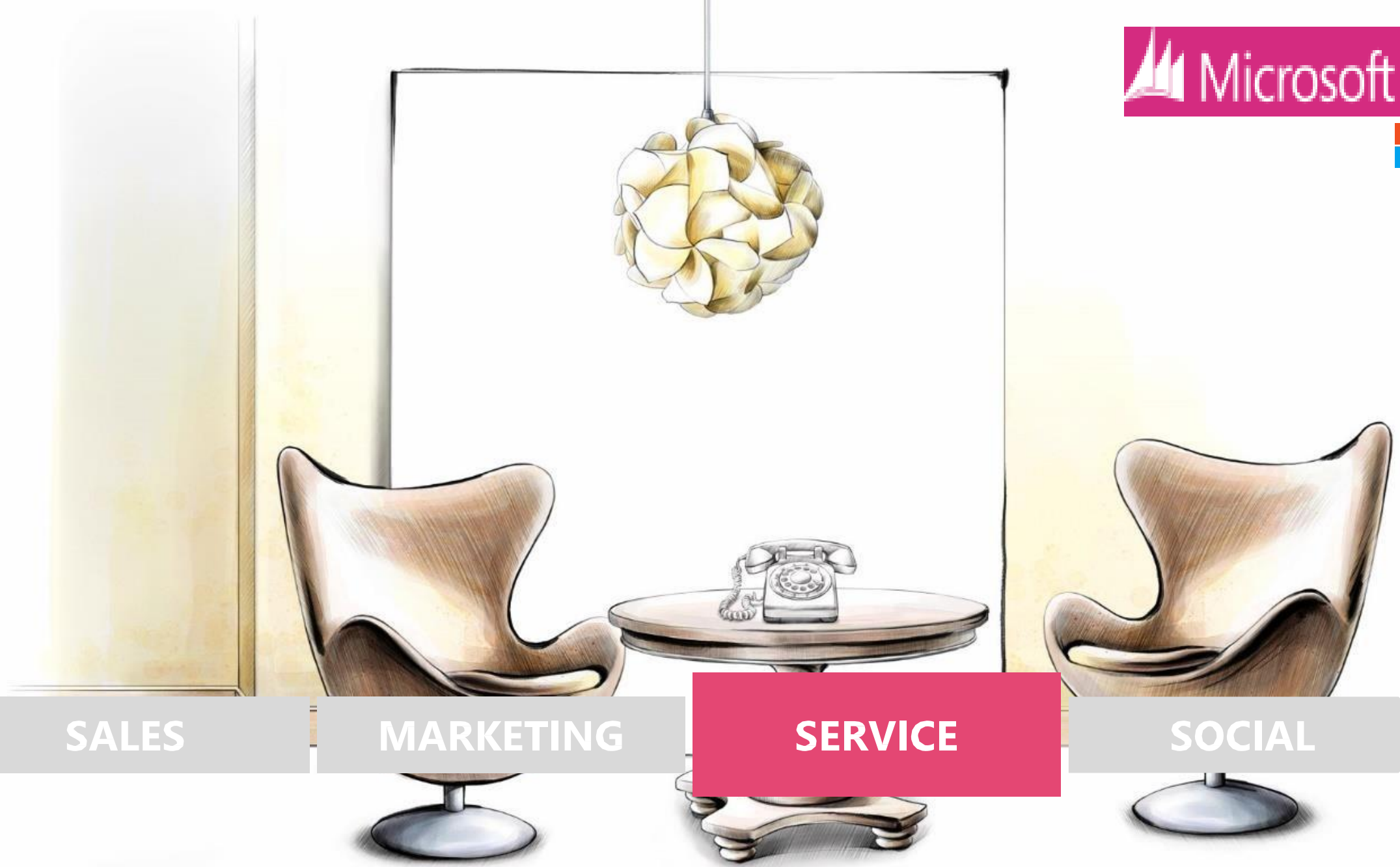Microsoft Dynamics 365

Dynamics 365 CE Services – RAPID IMPLEMENTATION

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SALES MARKETING **SERVICE** SOCIAL

Business Essentials have not Changed

Rapid Roll Out

Swift on Boarding

Customer Service Automation Expectations

Faster ROI & Highly Satisfied Customers

Define Business Units

Define & Configure of Service Process flow

Automatic creation of cases from email

Create or Edit a Queue

Service Management

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| Identify	Research	Resolve
• Create a Case • Identify Customer and contact • Finds similar cases • Reassign or add it back to the support queue • See the support cases Assigned to you along with other cases in support queue	• Use Knowledge base to get answers to common questions/solutions to problems and more • Use the activities area in a support case to track interaction between you and the customer.	• Set the status reason transition for case • Get dashboard on support trends

Service Management

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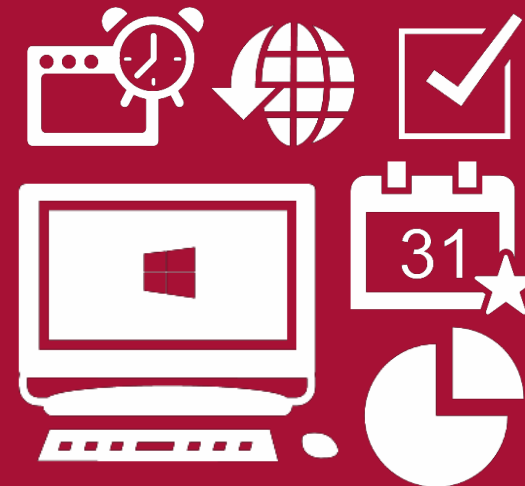
Application Summary

Simple	Focus on the essential functions with a clear, consistent purpose that matches user intention.	✓
Usable	Measure usability, incorporate feedback into designs.	⚙
Modern	Create delightful, engaging people and process centric experiences.	🖥
Fast	Design and deliver great perceived performance.	
Loved	Design for Love. Create experiences people want and simply can't live without.	

Rapid Implementation Scope

- **Configuring Dynamics 365**

The configuration of Dynamics 365 for Small Business organization shall include the below mentioned following:
  - Defining system defaults for organization like fiscal year and currency
  - Define single level Business Unit
  - Defining Dynamics 365 users & up to 2 security roles
  - Single design per object (Account, Contact, Case)
  - Maximum 12 Field validation
  - 25 Field creation or Modification across Entities
  - Knowledge management -out of box functionality (No Modifications)

- **Customer (Account/Contact) Data Import**
  - Import Account and Contacts in Microsoft Dynamics 365, provided the data is available in supported formats and in the Dynamics 365 supported data import templates:
  - Maximum 21000 records will be imported including Account, Contact, Products

- **Define Product**
  - The out of box products shall be configured into Dynamics 365

- **Define Business Process with existing set of fields in Case**
  - Business Processes will ensure that user enters data consistently and follow the same steps every time they work with a customer by creating a business process:
    - Qualify
    - Develop
    - Propose
    - Close

- **Define Alert**
  - Workflows & Alerts up to maximum 3 shall be created.

- **Reports and Dashboards**
  - Pivotal default reports and Default Dashboards will be made available

- **User Training**
  - Train the trainer - to maximum 3 users and one admin user

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- No Customization
- Customization would be done at additional cost
- No Integration with any other application
- Train the Trainer approach would be followed for training

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enjoy...

Microsoft **Dynamics 365**

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