

QuickStart Implementation Package

Microsoft Dynamics 365
for Sales

IA



Time Required: 1 week



Cost: \$7,500

Description: The QuickStart Basic Implementation Package is for businesses who need CRM functionality for their sales team. This package provides assistance with the provisioning of your Dynamics 365 for Sales instance, data conversion using our templates, module setup and training. You will have access to both a Senior Project Manager and a Certified CRM Consultant. It is intended for a single legal entity and is a great way to quickly get up and running. At the end of this one week engagement, we will identify additional recommendations as needed.

Implementation topics include:

- Combine Accounts and Contacts into one line
- Add Power BI Dashboarding
- Add User Setup and Security Roles
- Add User Personalization
- Add Duplicate Detection and Auditing rules
- Add Mobile App Setup
- Add Outlook Integration
- Add Document Management
- Add Workflows
- Add Form and View Customizations

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Imported Data:

- Accounts
- Contacts
- Opportunities
- Leads

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