



Microsoft Dynamics 365

**Dynamics 365 CE Sales – RAPID IMPLEMENTATION** 





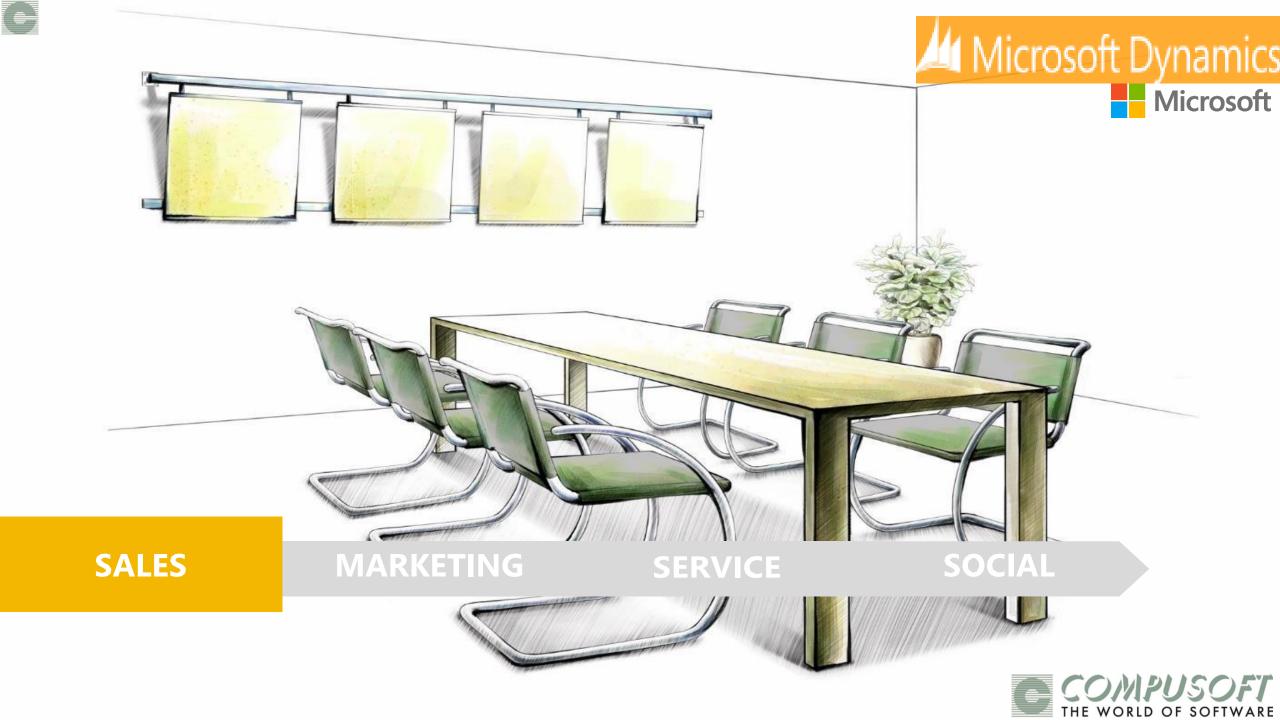




## Business Essentials have not Changed











Salesforce Automation









Salesforce Automation







Salesforce

**AUTO** 

Automation

in the solution ,qualify lead.

Qualifying a lead in **Dynamics365 converts** it to an opportunity.

competitors, and sales team members and come up with a proposed solution.

proposal to potential customer.

opportunity can include filling orders and sending follow-up messages.



## **Application Summary**

Focus on the essential functions with a clear, consistent purpose Simple 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. Design for Love. Loved 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:

- Creation of organization theme with logo
- 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, Lead /Opportunity)
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- Maximum 12 Field validation
- 25 Field creation or Modification across Entities
- Quote, Order and Invoice entities shall be standard 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, Lead, Opportunity, Products and 3 pricelists

#### Define Product & Price List

• The out of box products and price list shall be configured into Dynamics 365

#### Define Business Process with existing set of fields in entity Leads/Opportunity

- 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 out of box dashboards will be made available

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





# enjoy...





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