

# Text (SMS) Messaging for Dynamics Sales

## Analysis Document

User guide manual



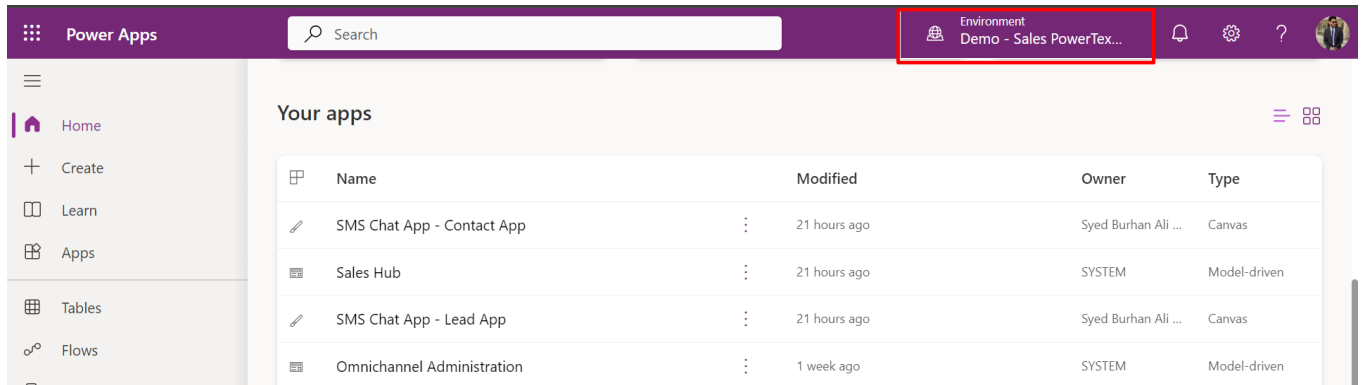
# Contents

- Step 1: Access Dynamics 365 Sales..... 2
- Step 2: Create a New Lead..... 3
- Step 3: Save and Qualify the Lead ..... 4
- Step 4: Creating an Opportunity..... 5
- Step 5: Managing the Opportunity..... 6
- Step 6: Closing the Opportunity ..... 7
- Using Text Messaging to coordinate with the lead/contact ..... 8

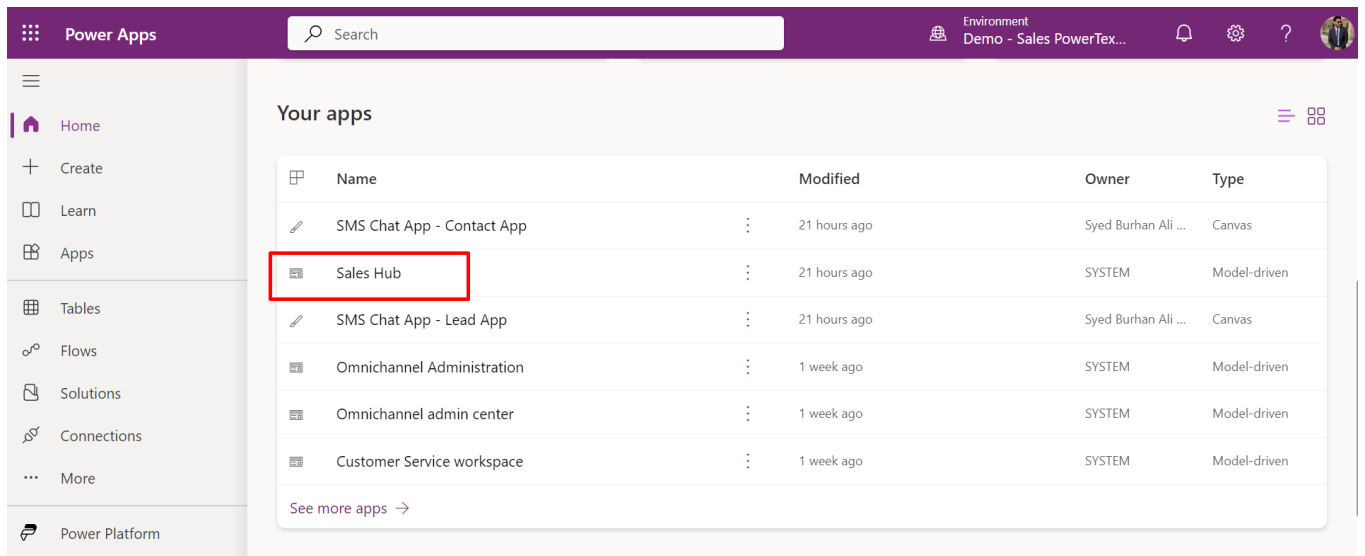
# Text (SMS) Messaging For Dynamics Sales

## Step 1: Access With Dynamics 365 Sales

1. Log in to your Dynamics 365 account.
2. Access the website: <https://make.powerapps.com/>
3. Navigate to the relevant Environment



4. Navigate to the Dynamics 365 Sales Hub. This can typically be done from the home page or app launcher.



## Step 2: Create a New Lead

1. In the Sales Hub, go to Leads. This can be found in the navigation bar on the left.

The screenshot shows the Sales Hub interface with the 'Leads' option highlighted in the left navigation bar. The main content area displays a table titled 'My Open Leads' with the following data:

Name	Topic	Status Reason	Created On
Catherine Dableu	New Age Productions	New	1/22/2024 3:11 ...
Paul Munroe	AY Sports	New	1/22/2024 3:09 ...
Sharon Evans	TransFit Gym	New	1/22/2024 2:21 ...

2. Click on "+New" to create a new lead.

3. Fill in the Lead Information. This includes details like lead's name, contact information, company name, and any other relevant details. Ensure you fill in as many fields as possible for a comprehensive lead profile.

The screenshot shows the 'New Lead' form in the Sales Hub interface. The form is divided into sections for Contact, Company, and Timeline. The 'Contact' section includes fields for Topic, First Name, Last Name, Job Title, Business Phone, Mobile Phone, and Email. The 'Company' section includes fields for Company, Website, and Street 1. The 'Timeline' section is currently empty and displays the message 'Almost there. Select Save to see your timeline.'

## Step 3: Save and Qualify the Lead

1. After entering all the details, click “Save” to save the lead.

The screenshot shows the Imperium Dynamics Sales Hub interface. The top navigation bar includes the logo, 'Sales Hub', and 'SANDBOX'. The main content area displays a 'New Lead' form with the following details:

- Topic: Penta Chemicals
- First Name: Chris
- Last Name: Harrison
- Job Title: Managing Director
- Business Phone: +12268871138
- Mobile Phone: +12268871138
- Email: ---

The lead is currently in the 'Qualify (< 1 Min)' stage. The 'Save' button is highlighted with a red box. The interface also shows a 'Summary' tab, 'SMS Chat', 'Details', and 'Files' sections. The 'Up next' section indicates 'Upcoming activities will appear here'. The 'Who Knows Whom' section shows 'No connections found'. The 'Assistant' section shows 'This record hasn't been created yet. To enable this content, create the record.'

2. To qualify the lead, click on “Qualify”. This will convert the lead into an opportunity.

The screenshot shows the Imperium Dynamics Sales Hub interface. The top navigation bar includes the logo, 'Sales Hub', and 'SANDBOX'. The main content area displays the 'Chris Harrison' lead, which has been saved. The lead details are the same as in the previous screenshot. The lead is currently in the 'Qualify (< 1 Min)' stage. The 'Qualify' button is highlighted with a red box. The interface also shows a 'Summary' tab, 'SMS Chat', 'Details', 'Files', and 'Related' sections. The 'Up next' section now shows 'Manage your activities' with 'Connect sequence' and 'Create activity' buttons. The 'Who Knows Whom' section shows 'No connections found'. The 'Assistant' section shows 'This record hasn't been created yet. To enable this content, create the record.'

3. A corresponding text message to notify lead creation is then sent to the Lead’s phone number reading “The Lead of Topic (Topic Name) has been marked as Qualified!” .

## Step 4: Creating an Opportunity

1. Upon qualifying a lead, an opportunity record is automatically created and consequently a notifying text message is sent to the lead “The Opportunity of Topic (Topic Name) has been created.”

The screenshot displays the Microsoft Dynamics 365 Sales Hub interface for an Opportunity record titled "Penta Chemicals". The interface is in "SANDBOX" mode. The top navigation bar includes options like "Save", "New", "Close as won", "Close as lost", "Recalculate", "Connect sequence", "Word Templates", "Check access", "Refresh", "Delete", "Process", and "Share". The main content area is divided into several sections:

- Opportunity Information:** Shows details for the Topic (Penta Chemicals), Contact (Chris Harrison), Budget amount, Currency (US Dollar), Purchase timeframe, Purchase process, and Forecast category (Pipeline).
- Opportunity details:** Includes a Description field.
- Timeline:** A central section showing a list of recent activities. Two activities are highlighted with a red box:
  - Text Message from: Sameer Irfan Kazi (Closed) - Lead Qualified
  - Text Message from: Sameer Irfan Kazi (Closed) - Opportunity Created
- Up next:** A section for managing activities with buttons for "Connect sequence" and "Create activity".
- Assistant:** A section for notifications and suggestions, currently showing "No notifications or suggestions".
- Stakeholders:** A list of stakeholders, including Chris Harrison (Stakeholder).
- Sales team:** A section for sales team information, currently showing "No data available".
- Competitors:** A section for competitor information, currently showing "No data available".

2. The opportunity will inherit information from the lead. Review and update any additional details as necessary.

## Step 5: Managing the Opportunity

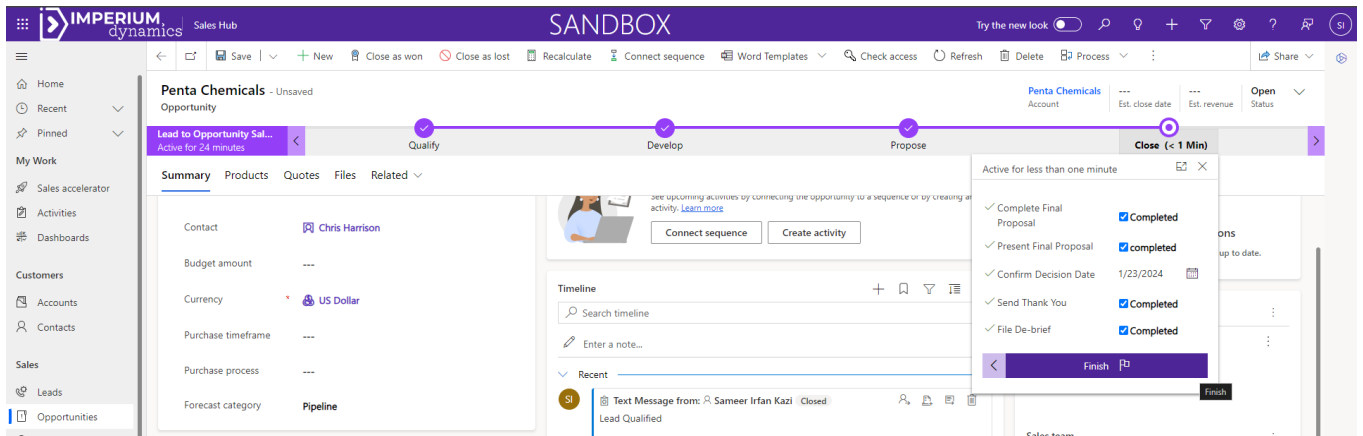
1. Proceed to the Propose stage once the Develop stage is complete Set the sales stage, estimated close date, and other relevant fields.

The screenshot displays the Imperium Dynamics Sales Hub interface for an opportunity named 'Penta Chemicals'. The top navigation bar includes the Imperium Dynamics logo, 'Sales Hub', and 'SANDBOX' mode. The main header shows the opportunity name, account, and status. Below this, a progress bar indicates the current stage is 'Develop (5 Min)', with previous stages 'Lead to Opportunity Sal...' and 'Qualify', and subsequent stages 'Propose' and 'Close'. The left sidebar contains navigation options like Home, Recent, Pinned, My Work, Sales accelerator, Activities, Dashboards, Customers, Sales, Leads, Opportunities, Competitors, Collateral, and Marketing. The main content area is divided into sections: 'Summary' (Purchase process, Forecast category: Pipeline), 'Opportunity details' (Description: Lead converted to opportunity, Current situation: Negotiations underway, Customer need: Freight charges to be covered, Proposed solution: Add a freight partner), and a 'Recent' activity feed. A modal window is open over the 'Recent' section, showing a list of tasks: 'Customer Need' (Freight charges to be covered, Add a freight partner, completed), 'Proposed Solution' (Add a freight partner, completed), 'Identify Stakeholders' (Identify Stakeholders, completed), and 'Identify Competitors' (Identify Competitors, mark complete). The modal also features a 'Next Stage' button. The right sidebar shows sections for 'Stakeholder', 'Sales team', and 'Competitors', all of which currently display 'No data available'.

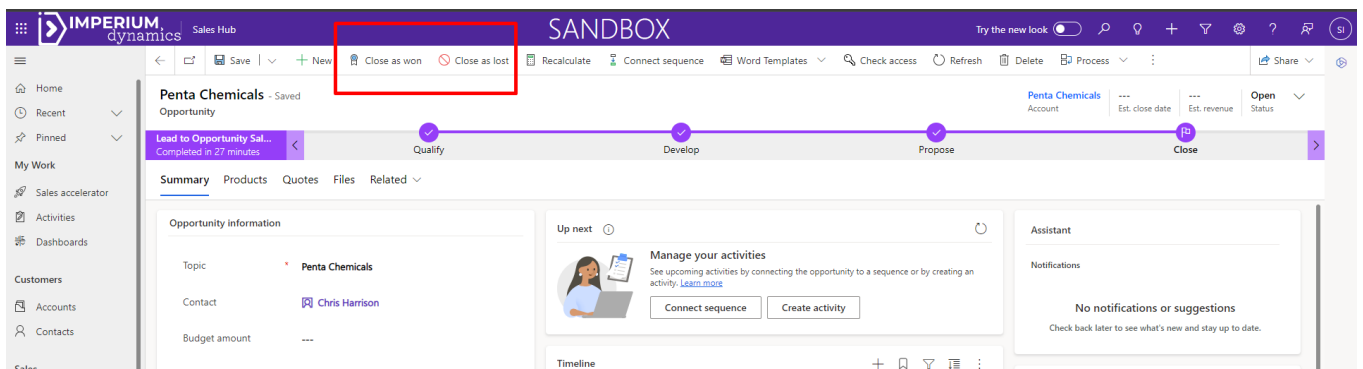
2. Regularly update the opportunity with any progress or changes.
3. Proceed to the Close stage once the Develop stage is complete.

## Step 6: Closing the Opportunity

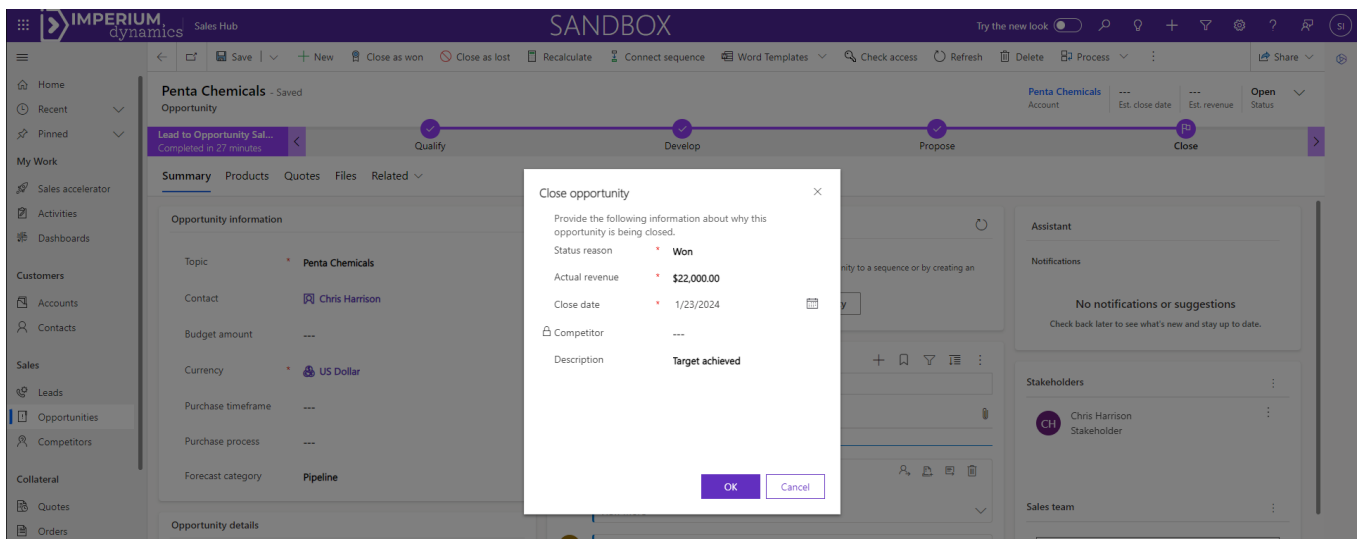
1. Update the opportunity status and click on Finish to finish the opportunity.



2. Once finished, mark the opportunity as 'Won' or 'Lost'.



3. Provide details on why the opportunity was won or lost for future reference.



4. When an opportunity is marked as "Won", a notifying message is sent to the lead contact that reads: "The Opportunity of Topic (Topic Name) has been marked as Won!"



# Using Text Messaging to coordinate with the lead/contact

1. In the Sales Hub, go to Leads or Contacts. This can be found in the navigation bar on the left
2. Find the Lead / Contact you want to text with and open the record
3. From the Lead / Contact form navigate to the “SMS Chat” tab and use the chat window to talk with the lead via text.

The screenshot displays the Imperium Dynamics Sales Hub interface. The top navigation bar includes the company logo, 'Sales Hub', and 'SANDBOX' environment. A secondary bar contains various action buttons like 'New', 'Delete', 'Refresh', 'Check Access', 'Process', 'Reactivate Lead', 'Assign', 'Follow', 'Flow', 'Word Templates', 'Run Report', and 'Share'. The main content area shows a lead record for 'Chris Harrison' with a 'Qualified' status. A progress bar indicates stages: 'Lead to Opportunity Sal...' (Completed in 27 minutes), 'Qualify', 'Develop', 'Propose', and 'Close'. The 'SMS Chat' tab is highlighted with a red box. The chat window shows a conversation with 'Chris (+1431-4009556)'. The messages are as follows:

- Chris: [Redacted]
- System: Hey Chris, when can we schedule an online meeting this week to discuss the proposal? 04:25PM 23/01/24
- Chris: Does 3pm on Wednesday work for you? 04:43PM 23/01/24
- Chris: Would appreciate if you can send over the proposal before we meet on Wednesday 04:44PM 23/01/24
- System: PFA the proposal 04:46PM 23/01/24  
PentaChemicals\_Proposal\_Updated.pdf

The chat interface includes a 'Send a message...' input field, a file attachment icon, and a 'Send' button.