Text (SMS) Messaging for Dynamics Sales

Analysis Document

User guide manual

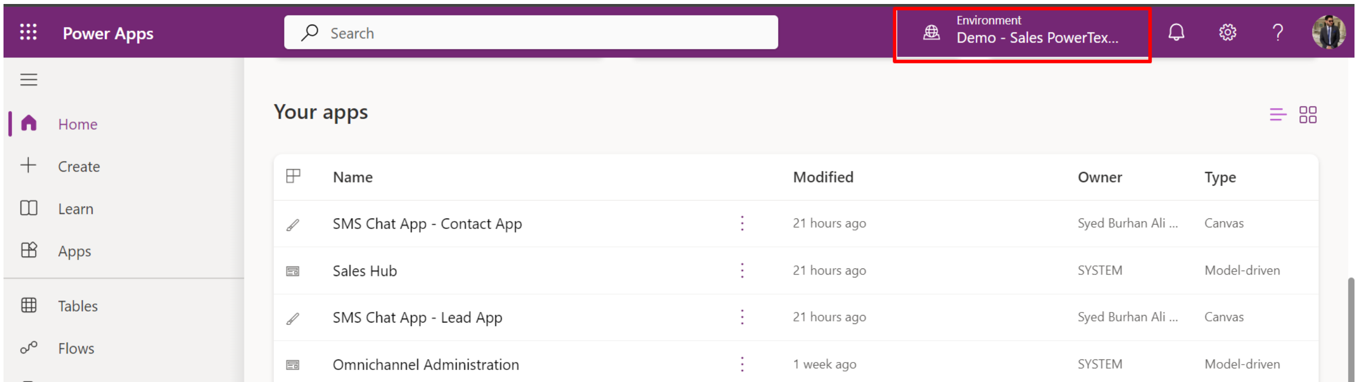
IMPERIUM dynamics

Contents

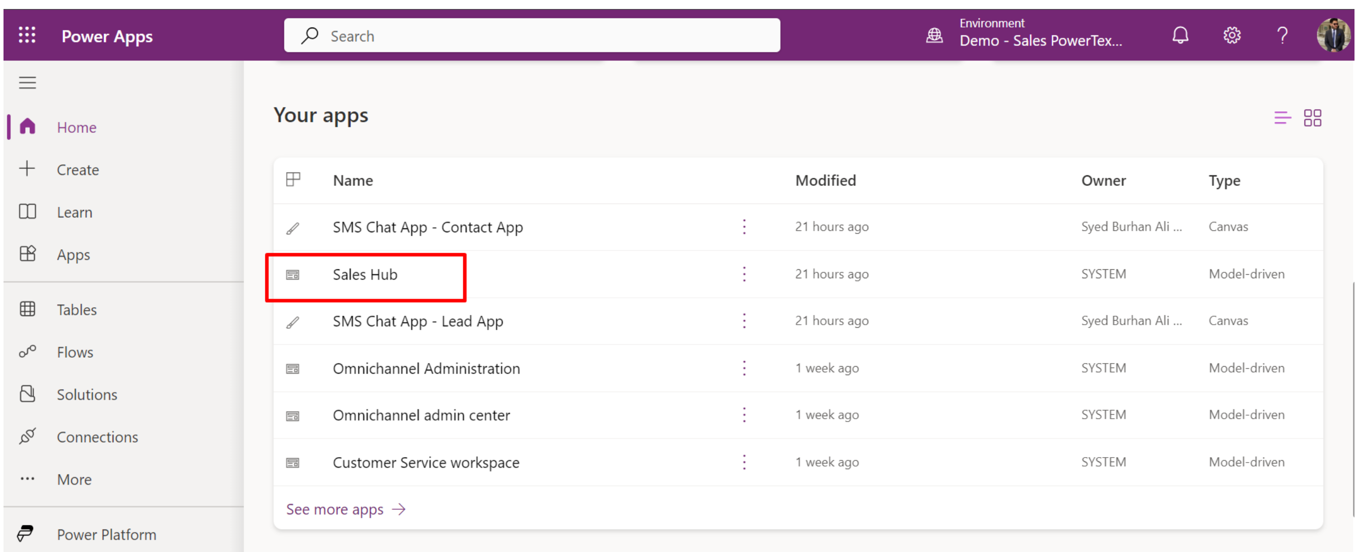
Text (SMS) Messaging For Dynamics Sales

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

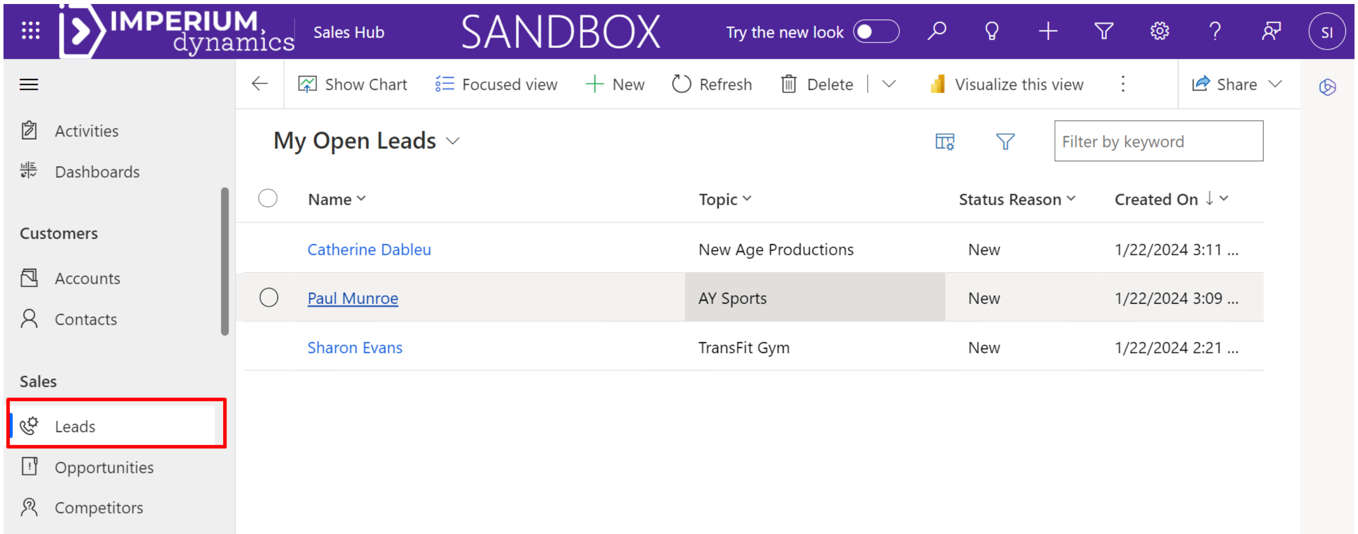


4. Navigate to the Dynamics 365 Sales Hub. This can typically be done from the home page or app launcher.



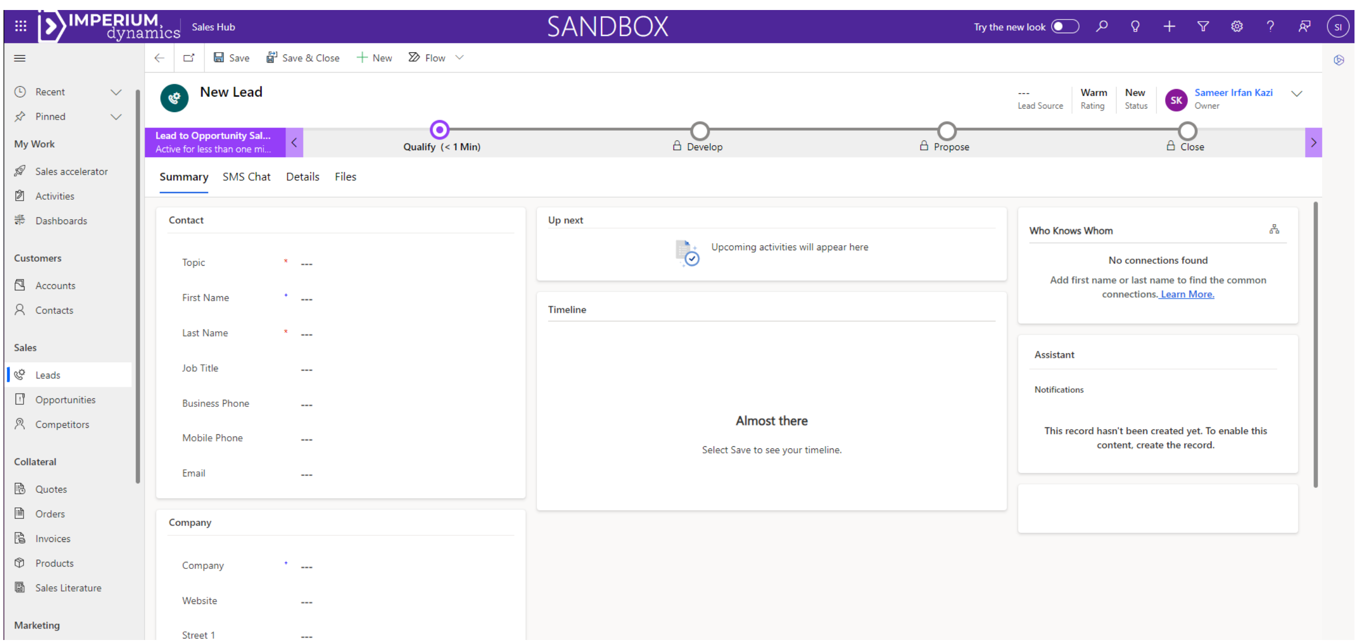
Step 2: Create a New Lead

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



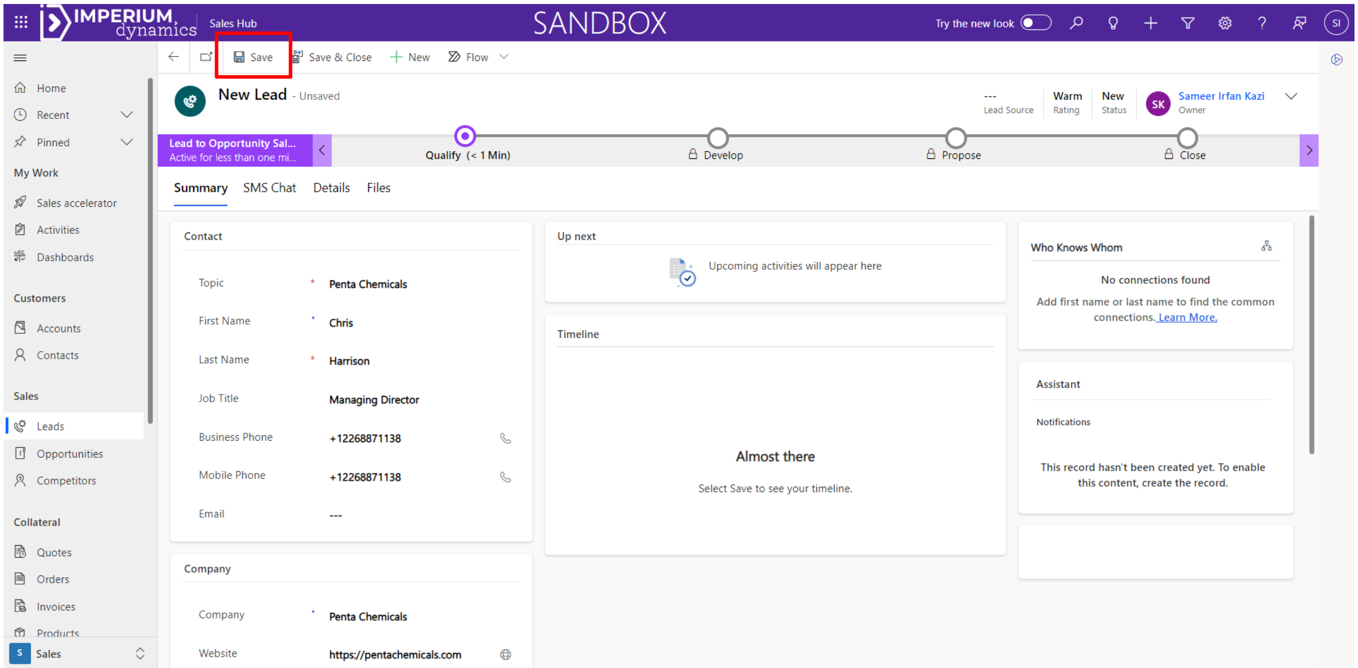
2. Click on "+New" to create a new lead.

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.

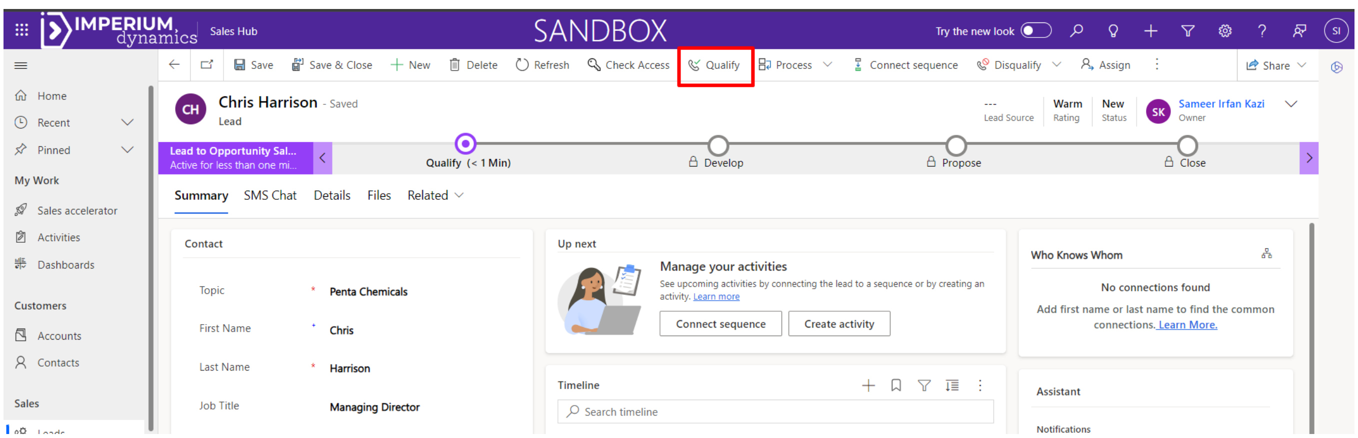


Step 3: Save and Qualify the Lead

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



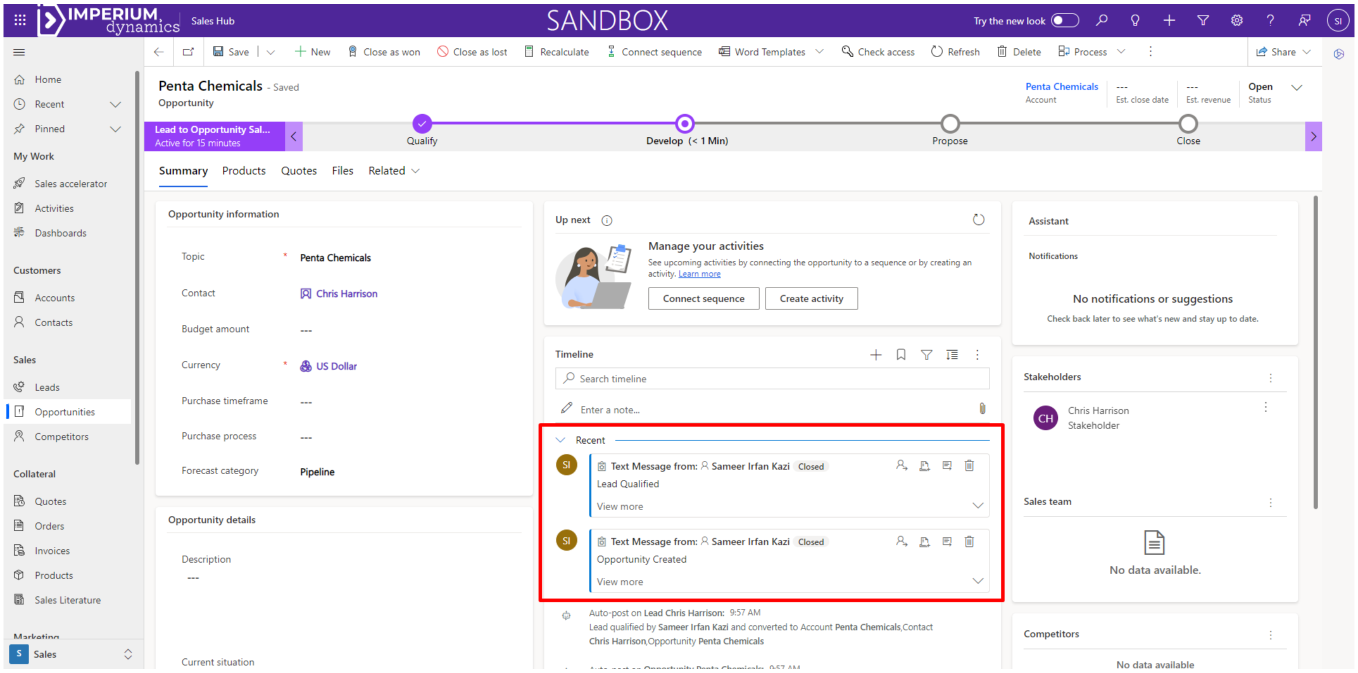
2. To qualify the lead, click on “Qualify”. This will convert the lead into an opportunity.



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

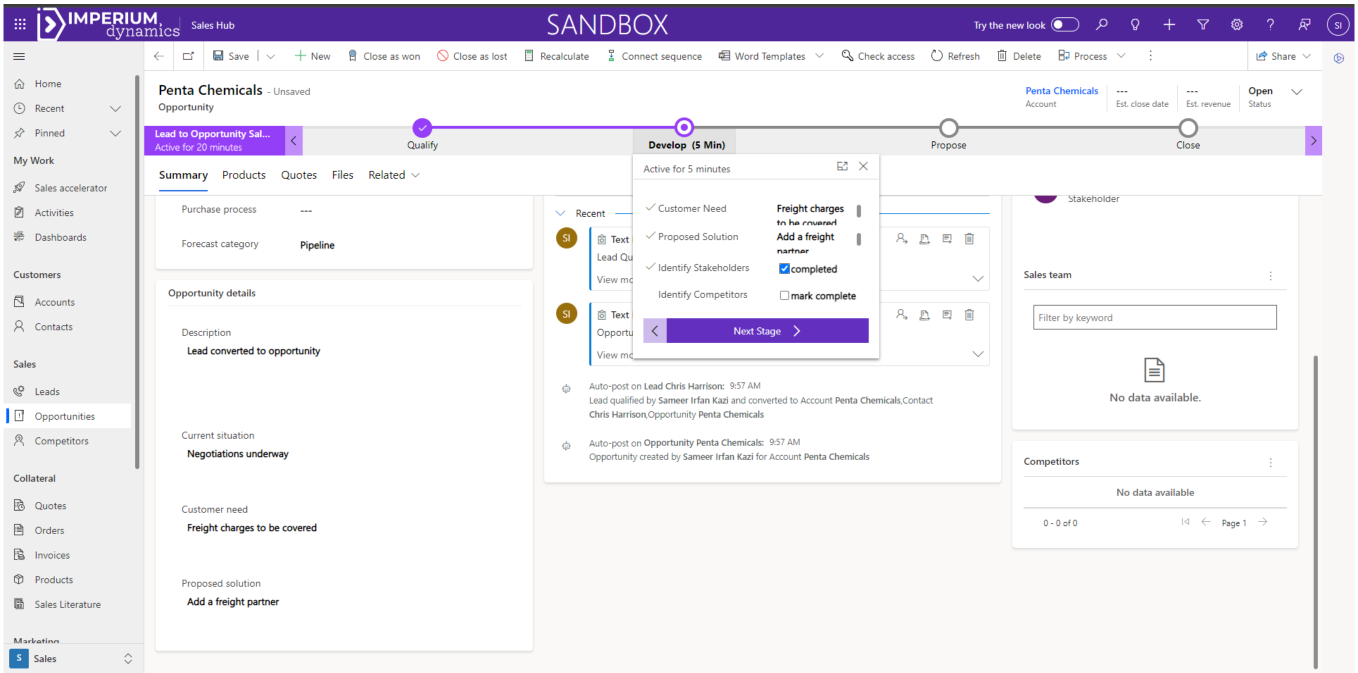
1. Upon qualifying a lead, an opportunity record is automatically created and consequently a notifying text message is sent to the lead “The Opportunity of Topic (Topic Name) has been created.”



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

Step 5: Managing the Opportunity

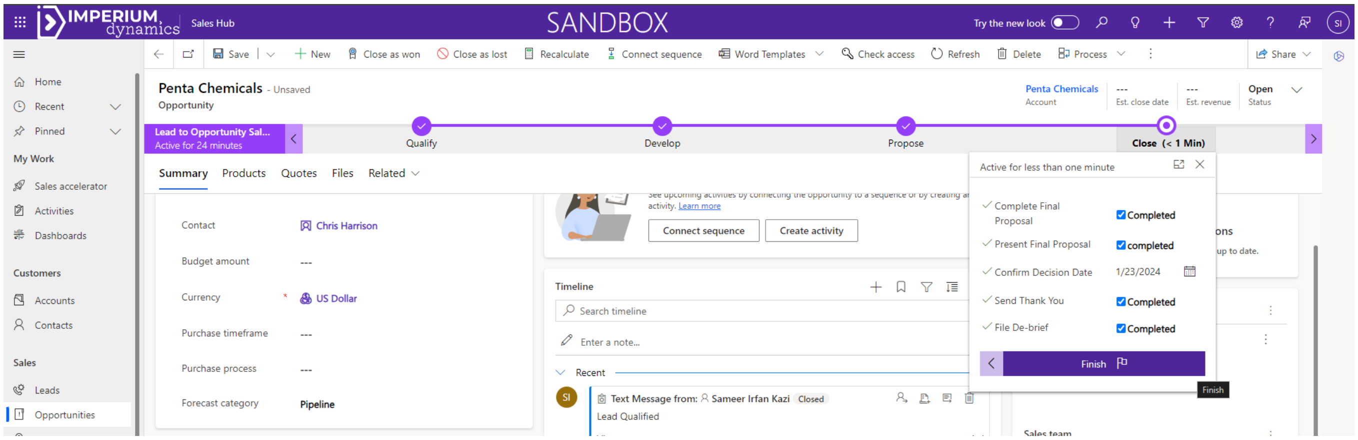
1. Proceed to the Propose stage once the Develop stage is complete Set the sales stage, estimated close date, and other relevant fields.



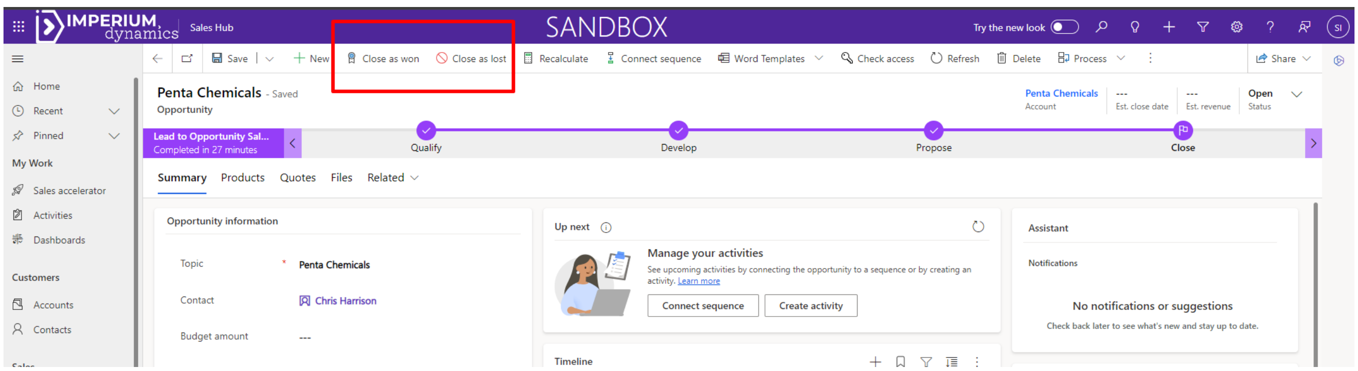
2. Regularly update the opportunity with any progress or changes.
3. Proceed to the Close stage once the Develop stage is complete.

Step 6: Closing the Opportunity

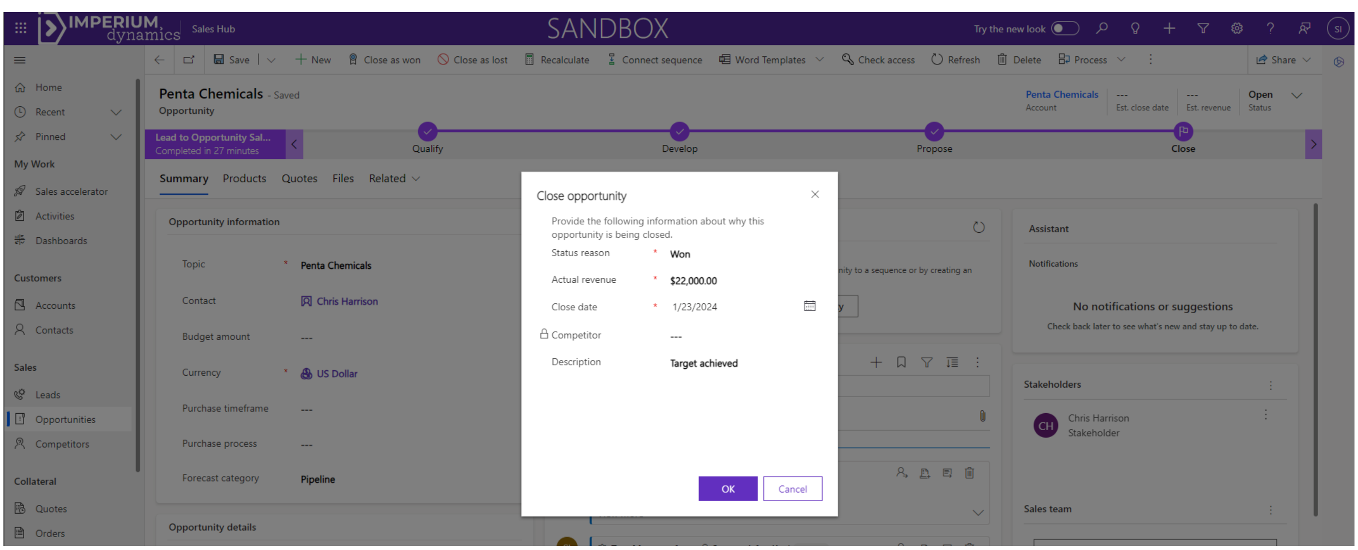
1. Update the opportunity status and click on Finish to finish the opportunity.



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.