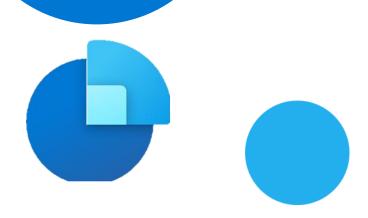
Empowers the sales team with the insights, guidance, and tools to drive personal engagement with customers, helping organizations to gather, organize, qualify, access and score leads faster than the competitors.



# **DYNAMICS 365 SALES**

**Customization, Development and Consulting Practice** 

- ✓ Transform relationship into revenue
- ✓ Empower sellers with authenticity and personalization
- ✓ Drive innovation with evolutionary technology



http://www.cognitiveconvergence.com

+1 4242530744

shahzad@cognitiveconvergence.com



## About us

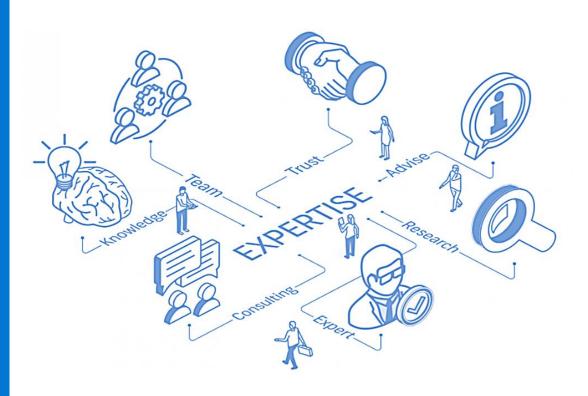
Cognitive Convergence is a subject matter expert in Dynamics 365 consulting having certified and experienced consultants which will create custom, robust, and scalable apps for different business needs in no time.

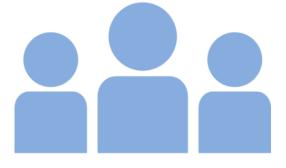
Our core Dynamics 365 Sales consulting are:

- ✓ Unify sales process
- ✓ 360-degree view of customers
- ✓ Track and expediate customer journey
- ✓ Automate workflows with Power Apps and Power Automate (Flow)
- ✓ Generate customized reports and integrate the different modules
- ✓ Workflow automation
- ✓ Sales performance
- ✓ Artificial intelligence
- ✓ Integration
- ✓ Scalability

**Current Location**: Lahore, Pakistan

Planned Front-end Office: California/Washington States- USA





### About us

#### **Dynamics 365**

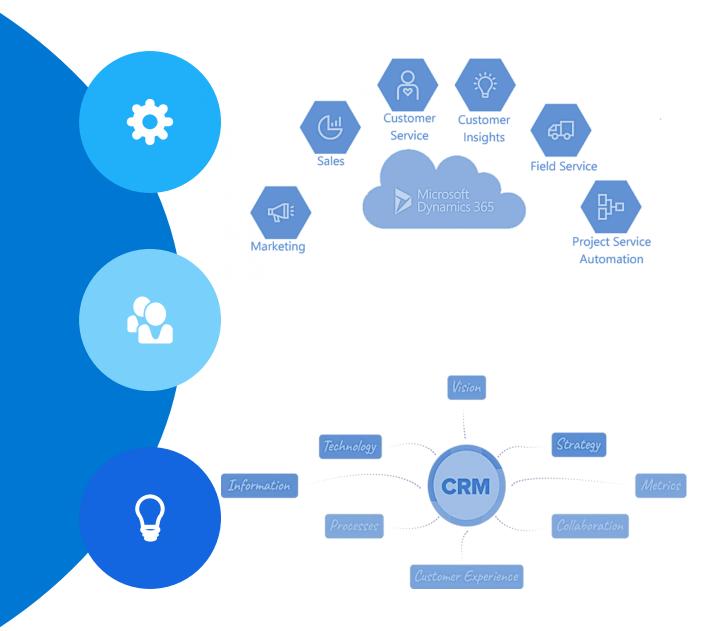
Microsoft Dynamics 365 helps the organizations with their smooth digital transformation including selling journey, customers' understanding to building meaningful relationships with potential leads.

- ✓ Understand customers and uncover potential leads
- ✓ Stay connected to prospects
- ✓ Build meaningful relationships
- ✓ Adapt to rapid changes while executing campaigns
- Create exceptional customer journeys with state of art custom t emplates for promotional emails
- ✓ Organize events for planning and managing detailed information about every concerned person



## **Modules of Dynamics 365**

- ✓ Customer Service
- ✓ Field Service
- ✓ Finance and Operations
- ✓ Marketing
- ✓ Project Operations
- ✓ Retail
- ✓ Sales
- ✓ Human Resources
- ✓ Supply Chain Management
- ✓ Business Central
- ✓ Commerce



### **DYNAMICS 365 SALES**

#### Introduction

The dynamics 365 sales module helps to provide useful insight into prospective customer sources. It allows to have a touch of personalized service for exceptional customers experience such as engagement data, sales productivity, and performance metrics.

#### **Benefits of Dynamics 365 Sales**

- ✓ Import data easily
- ✓ Tele market the right way
- ✓ Leads Management
- ✓ Business agility
- ✓ Targeting the right prospects
- ✓ Effective communication
- ✓ Boosting sales productivity
- ✓ Improved customer service
- ✓ Extremely convenient
- ✓ Live sales dashboard
- ✓ Social media integration
- ✓ Manage customer events
- ✓ Automatic lead scoring



### **DYNAMICS 365 SALES**

Dynamics 365 Sales offers features that allow organizations to improve their experience with commercial sales strategies. Using an interface, access to information about products, prices, and benefits that will be offered to the final customers or consumers.

#### **Features of Dynamics 365 Sales**

- ✓ Sales automation
- ✓ Smarter selling strategies
- ✓ Authentic customer relationship
- ✓ Increases productivity
- ✓ Innovative sales solutions
- ✓ Advanced insights to increase sales profitably
- ✓ Improved coaching and sales performance
- ✓ Adaptable sales solutions that help innovate
- ✓ Built-in collaboration
- ✓ sales accelerator capability for digital scalability

Two featured tabs in Dynamics 365 Sales are:

- ✓ Sales
- ✓ Sales Insight

Microsoft
Dynamics 365
Sales





### **LEAD**

- ✓ A potential customer who must be qualified or disqualified as a sales opportunity
- ✓ Reduces the number of records created directly as Accounts and Contacts
- ✓ Provides basic information
- ✓ Allows a clean line to be drawn between leads and customers
- ✓ representative of a potential customer at an earlier stage
- ✓ making the initial determination if a potential customer is interested in your offerings
- ✓ Leads are useful for:
  - Avoiding unnecessarily contacting someone who typically isn't interested in the goods or services that you sell
  - Beginning of a sales process





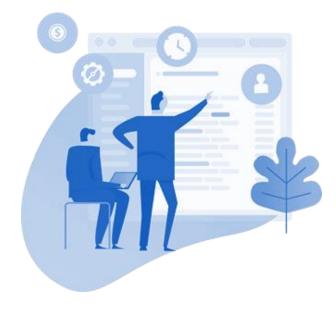
## **Opportunities:**

- ✓ Interest shown by customers in buying your products
- ✓ Provide specific details like potential revenue, timelines, and information about products or services.
- ✓ Important part of the sales process since sales team typically spends most of its time and effort on them.
- ✓ Includes several components that are used not only to sell to customers but to help maintain a healthy long-term relationship with customers.

#### Features of opportunity management involves:

- ✓ Assigning and sharing opportunities with the most appropriates individuals or teams
- ✓ Tracking product and service details for items that the customer is interested
- ✓ Providing the most appropriate literature to the customer
- ✓ Managing and tracking the sales activities that are related to the opportunity
- ✓ Tracking stake holders and competitors
- ✓ Moving opportunities through a sales process workflow





### **COMPETITORS**

✓ Another company that offers competing products and services

✓ Includes adding and maintaining competitor records, and storing competitor documents

✓ Let's you disperse competition information to everyone who deals with an opportunity so that they can compete in the most effective way possible to close the sale and maintain the relationship

✓ Helps you compare your business unit to the competition, including opportunities lost to and won against competitors

#### Relationship of competitors and opportunities:

✓ One or many competitors can be associated with any opportunity.

✓ By using this association, salespeople give management the ability to track their overall win/loss record versus specific competitors

✓ Further analysis regarding the cause of losses and other outcomes.











## **QUOTES**

#### **Quotes:**

- ✓ A formal offer for products or services proposed at specific prices and related payment terms that is sent to a prospective customer
- ✓ Can have a due date (when it was promised to the customer), effective dates (when it must be accepted or rejected by), and the requested delivery dates.
- ✓ Can contain many "ship to" addresses (by line item) or a "will call" setting for items to be picked up by the customer.

#### Relationship of quotes with other entities:

- ✓ Quote is created from an opportunity Dynamics 365 Customer Engagement (on-premises) will use the products associated with the opportunity as the basis for the draft.
- ✓ Quote is converted to an order, the user can keep the opportunity open or close it.
- ✓ If the user closes it, the final revenue amount is recorded.













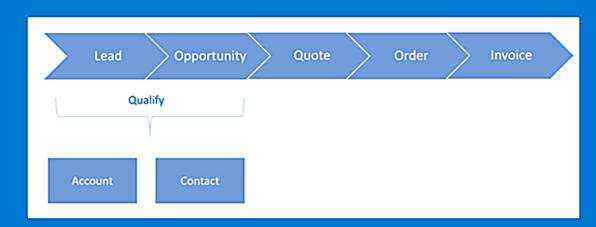




## **QUOTES**

### A quote can be associated with the following entities:

- ✓ One or more products and one price list
- ✓ One or more competitors
- ✓ An opportunity
- ✓ A customer
- ✓ One or more notes and attachments
- ✓ One or more customer addresses













### **ORDERS**

- ✓ Request from a customer to buy products or services.
- ✓ Confirmed request for delivery of goods and services based on specified terms or a quote that has been accepted by a customer
- ✓ Can have multiple line items associated with it, where the quantity, price, and products being sold can be tracked.
- ✓ Common point of integration for organizations that have Microsoft Dynamics 365 integrated with accounting applications





### **INVOICES**

#### **Invoices:**

- ✓ Requests for payment from a business to its customers
- ✓ Can be, but are not required to be, related to orders
- ✓ Generated from an order after it is fulfilled or when it is place **Process**:
- ✓ The most common way for an invoice to be generated is to create it directly from an order.
- ✓ When the invoice is created, all the products that were associated with the order will be automatically added to the invoice.
- ✓ Additional products or services can be added or removed from the order after it has been created.

#### **Closing invoices**

When you mark an invoice as paid, you can select one of two options:

- ✓ **Completed** The invoice was completely paid by the customer.
- ✓ **Partial** The invoice was only partially paid by the customer.





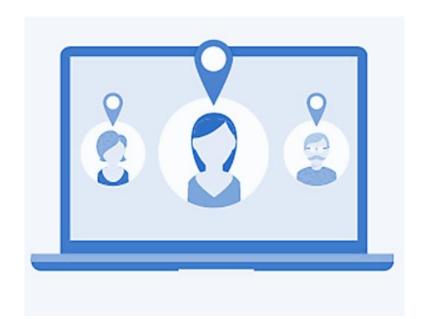






### **CAMPAIGN**

- ✓ Designed to accomplish a specific result
- ✓ A new product or increasing market share
- ✓ Often include more than one communication method
- ✓ Can be thought of as a container in which a business keeps planning tasks, campaign activities, and campaign responses
- ✓ Has a list of related products, sales literature, and a set of marketing lists of existing or potential customers
- ✓ Used to plan and track the results of a marketing campaign
- ✓ Supports campaign execution through campaign activities that are used to distribute emails, phone calls, and other activities to qualified customers
- ✓ Supports campaign execution through campaign activities that are used to distribute emails, phone calls, and other activities to qualified customers





### LIST

- ✓ Group of existing or potential customers created for a marketing campaign or other sales purposes.
- ✓ Help you create lists of potential customers or existing customers for marketing purposes.
- ✓ A potential target for a campaign
- ✓ Can also use it for other marketing reasons.
- ✓ Can generate subsets of a list by using different parameters for a campaign or to run an activity in bulk mode

### **Products**

- ✓ Part of the Product Catalogue entity
- ✓ A record representing an individual Product or Service offered to customers
- ✓ Can be associated with Opportunities, Quotes, Orders, and Service Cases





### **GOALS**

- ✓ Used for compensation, bonuses, or even advancement within an organization
- ✓ Track what the company and its team will be selling against a given target
- ✓ Provide a visual, strategic, and emotional target to reach.
- ✓ Motivates us to exceed "normal" expectations
- ✓ Supplies information on how we are doing to meet the stated goal
- ✓ Defined for a specific user or team.
- ✓ Targets for activity record types, such as followed-up phone calls or appointments booked, and then compared against completed activities.
- ✓ Not only provide employees with something tangible, but their progress can be easily measured as they are working through to their end goal.





### **Forecasts**

- ✓ Forecast period and select forecasts for a Monthly, Quarterly or Custom period as per need
- ✓ Categorizing the opportunities
- ✓ Viewing the forecasts by directly navigating
- ✓ Helps your organization predict how much revenue your sales team will generate in each timeframe
- ✓ Play a significant role in your company's success.
- ✓ By using a forecast:
  - Performance against quotas to proactively provide coaching.
  - Directors can use forecast trends to anticipate departmental sales and reallocate resources if necessary.
  - Organization leaders can use the projected estimates to change the product strategy or convey updated projections to investors.
  - Can define the type of forecast, its hierarchy, permissions for accessing it, and the details you want to appear on the forecast grid.

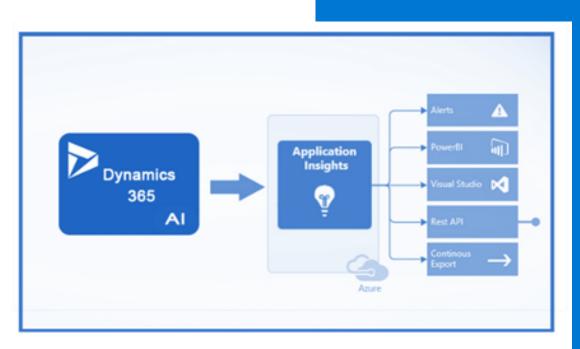




## MSDYN\_FORECAST API ACTION

- ✓ Custom action to retrieve and update forecasting data.
- ✓ Parameters are following:
  - 1. WebApiName (Contains the name of the API to be executed)
  - 2. RequestJson (Contains the parameters and the arguments for the API call)
- ✓ Given below are the set of APIs you can invoke using the msdyn\_ForecastApi custom action:
  - 1. GET\_ForecastConfigurations
  - 2. GET\_ForecastConfigurationsByName
  - 3. GET\_ForecastPeriodsByForecastConfigurationId
  - 4. GET\_ForecastInstances
  - 5. Update\_SimpleColumnByEntityId
  - 6. Update\_SimpleColumnByFIId







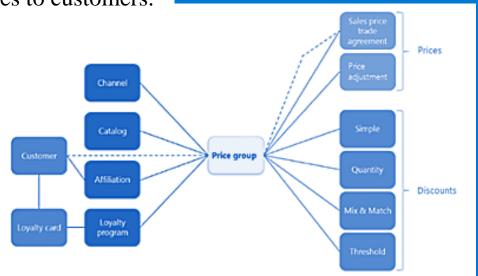
### RECALCULATE PRICE ACTION

- ✓ Action used to trigger out of the box price calculation for Opportunity, Quote, Sales Order or Invoice entities
- ✓ Applicable for both server and client invocations
- ✓ Parameters are following:
  - entityLogicalName (Entity logical name)
  - entityId (Entity GUID)



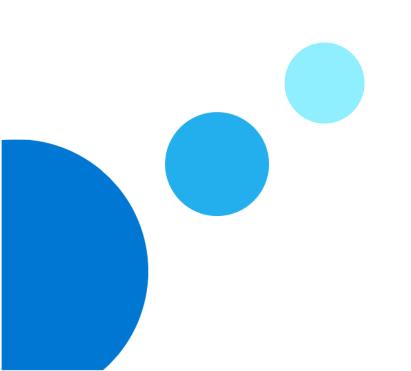
## PRODUCT CATALOG

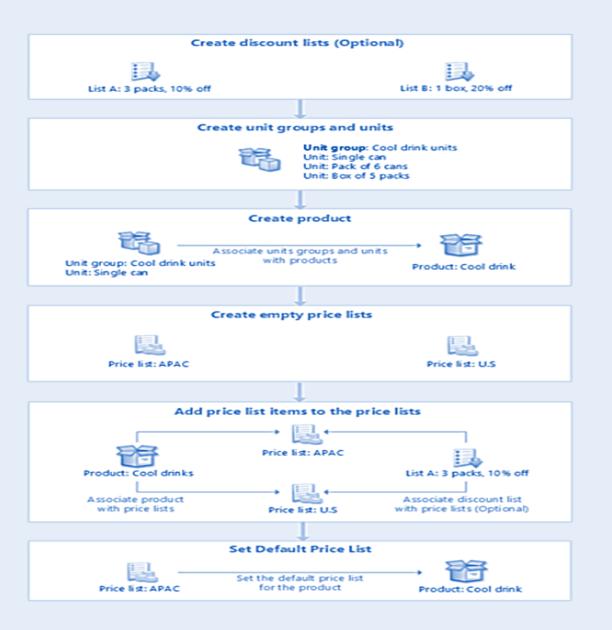
- ✓ A collection of products and services that an organization sells and provides to customers.
- ✓ Includes pricing information
- ✓ Let you create a rich product classification system
- ✓ Typical product catalog not only includes a list of the products that an organization sells but also defines different pricing tiers



## Process of creating product catalog

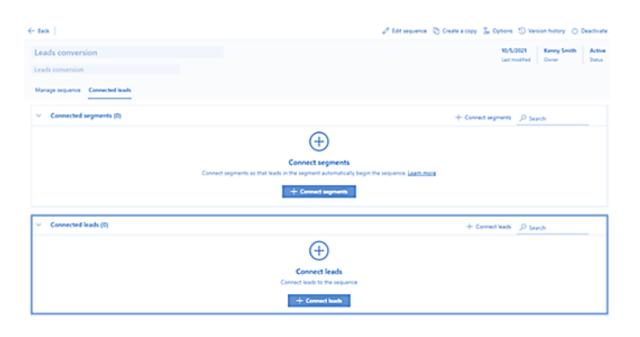
- 1. Create discount lists to offer your products and services.
- 2. Define the measurements or quantities of your products.
- 3. Create products for the items you sell.
- 4. Define pricing for your products.
- 5. Add price list items.
- 6. Select one of the price lists to which you added the product as the default price list for the product.





### SALES LITERATURE

- ✓ Basic unit of the marketing encyclopedia in Dynamics 365 Customer Engagement
- ✓ Create a central repository for your organization's sales information
- ✓ Provides an easy way to distribute information to users, both online and offline
- ✓ It be organized into categories and types to provide easier management and searching
- ✓ Supports a subject manager and knowledge base.
- ✓ It can have one or more sales literature items (sales attachments) attached to it in various formats, such as .doc, .pub, and .pdf.
- ✓ Item cannot be shared between sales literature records.
- ✓ Literature/documents can also be added into the products and competitors





### **SALES PREMIUM**

### MSDYN CONNECT SEQUENCE ACTION

- ✓ Action used to assign a lead and opportunity entity record to a sequence.
- ✓ Parameters are following:
  - 1. RegardingEntityId (Unique identifier of the entity record that is to be connected to the sequence)
  - 2. RegardingEntityName (Logical name of the entity)
  - 3. SequenceId (Unique identifier of the sequence)

### **ENTITY REFERENCE**

- ✓ Used to understand the available operations that can be performed for specific entities
- ✓ The default attributes of each entity and the relationships between entities
- ✓ Custom entity contains attributes such as, score, trend, grade, and score reasons.
- ✓ Custom entity used to generate scores for each model. For internal use only
- ✓ A common solution that holds information related to lead and opportunity scoring





## **SALES INSIGHT**

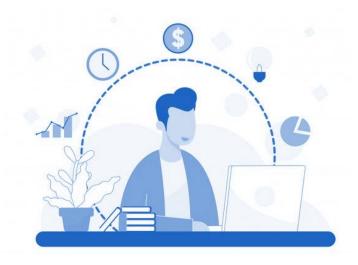


- ✓ Enables teams to harness artificial intelligence capabilities easily.
- ✓ Requires minimal configuration for users to access additional prebuilt sales:
  - 1. Dashboards
  - 2. Various visualizations
  - 3. Embedded insights

#### Some features include:

- ✓ Sales Accelerator
- ✓ Assistant Studio: Insights cards, and Optimize ranking
- ✓ Productivity: Conversation intelligence, Auto capture and Email engagement
- ✓ Predictive models: Lead scoring, Opportunity scoring and Premium forecasting
- ✓ Marketing and Prospecting: Linked In Sales Navigator and Account Management



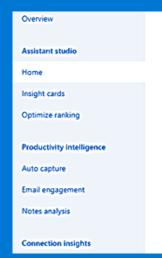


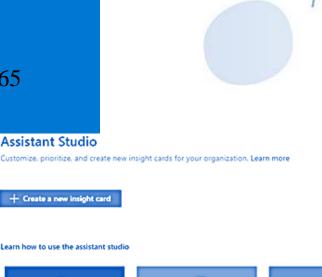
### **ASSISTANT STUDIO**

- ✓ Showing the right insights at the right time make a significant difference in productivity.
- ✓ Ideally used to give real-time view of important tasks and notify the user to take necessary actions.
- ✓ Provides many out-of-box insights through Relationship Assistant
- ✓ Ensures to add customized insights and display for organizations as per their needs
- ✓ Allows you to create insights through low code no code.

#### **Benefits:**

- ✓ Create and manage insight cards from within Dynamics 365
- ✓ Offers Auto capture and Email engagement
- ✓ Notes analysis
- ✓ Build Relationship analytics
- ✓ Who knows whom?
- ✓ Predictive lead scoring model
- ✓ Predictive opportunity scoring.



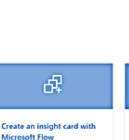


Assistant Studio

- Create a new insight card

D

About the assistant





Promote an insight card





Show cards to users by security role

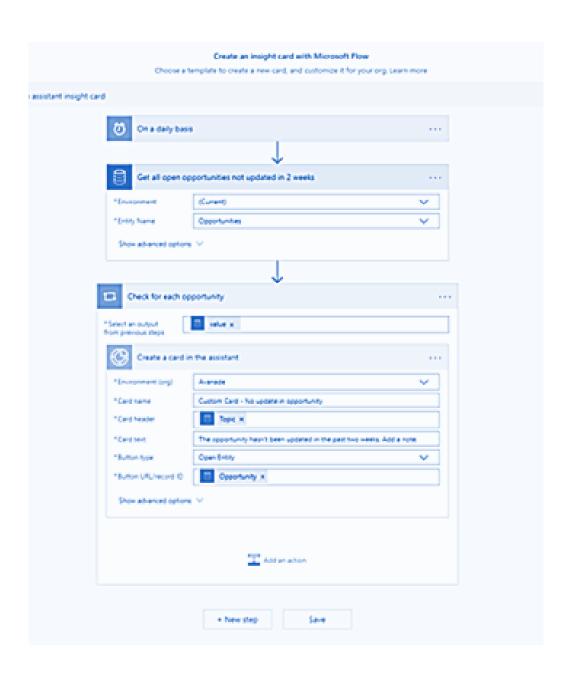
Advanced configuration and troubleshooting

## Configuration of assistant studio

### **Configuration/Customization:**

- ✓ Create & Manage Insight Cards
- ✓ Modify the flow as per business requirements
- ✓ Create insight cards for each follow-up requirements
  - Each insight card will be generated or configured on any trigger
  - Insight card can be created with any of the following primary action type:
    - 1. Custom action (CRM Process)
    - 2. Launch playbook
    - 3. None
    - 4. Open record
    - 5. Open URL
    - 6. REST





## **Our Consultancy for Dynamics 365 Sales**

Our core services for Dynamics 365 Sales module are:

- 1. Customization
- 2. Workflows
- 3. Custom Reports
- 4. Lead Scoring Models prioritize the leads for fast conversion.

### **Dynamics 365 sales Customization**

Dynamics 365 Sales Module itself is a powerful tool that:

- ✓ Provides a complete solution to sales teams to streamline their processes
- ✓ Modular app that is built to provide tailored capabilities for sales professionals.

You can customize the following as per your need:

- ✓ Forms
- ✓ Views
- ✓ Business Process Flows
- ✓ Application Management





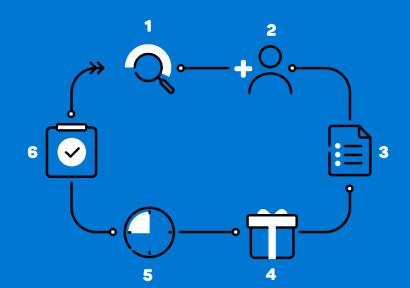


## **Dynamics 365 Sales Workflows**

- ✓ Series of functions or methods performed sequentially
- ✓ Automated process used in business process to send Email
- ✓ Assign a task
- ✓ Update a field on rule criteria or action based criterial

#### **Benefits:**

- ✓ Introduce ease of access to commonly used components
- ✓ Align sales efforts
- ✓ Help improve their productivity while offering flexibility in product management
- ✓ UI-based product reparenting







## **Dynamics 365 Custom Reports**

- ✓ Includes a Report Wizard where built-in reports are available to use for multiple common sales needs.
- ✓ Right reporting keeps your sales data organized.
- ✓ Provides the insight a business needs to make informed decisions is often the goal of implementing a CRM system
- ✓ Represent a significant portion of the project implementation quote

#### **Configuration/Customization:**

- ✓ Using Report Builder
- ✓ Dashboards using Power BI
- ✓ Create a custom layout
- ✓ reports and dashboards using Power BI analytics to uncover new data insights.





## Sales Lead scoring supports

- ✓ Primary goals to generate demand to identify sales
- ✓ Best suited prospects to follow up
- ✓ Supports process from start to the end to generate leads across multiple channels
- ✓ Involves in locating warm leads to enhance its success profitability over time

#### **Configuration/Customization:**

- ✓ Lead nurturing and qualification
- ✓ Set up and manage flexible lead-scoring models based on:
  - 1. Lead prioritization
  - 2. Analysis and insights on dashboard to experience real-time growth
  - 3. Customize lead creation and matching





### DIFFERENT SALES OFFERINGS

Different sales offerings to fit every size and type of business:

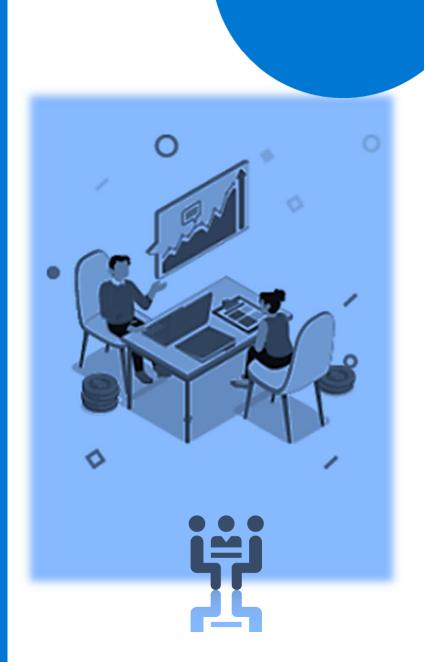
- ✓ Sales Premium: Ideal for large enterprises.
  - Helps to surge a sales automation solution with AI-driven insights powered by conversation intelligence, relationship intelligence.
- ✓ Sales Enterprise: Ideal for small-mid sized enterprises
  - Helps to leverage a sales automation solution with contextual insights and advanced customization capabilities
- ✓ Relationship sales: Ideal for enterprises that need to connect sales records with LinkedIn to enhance business processes with data about people, organizations, and relationships
- ✓ Sales Professional: Ideal for the sales automation needs of small or medium-sized businesses.



Sales	First Dynamics 365 app	Subsequent qualifying 1 Dynamics 365 app
Sales Professional	\$65 Per user/month	<b>\$20</b> Per user/month
Sales Enterprise	\$95 per user/month	\$20 Per user/month
<u>Sales Premium</u>	\$135 Per user/month	
Microsoft Relationship Sales	\$162 Per user/month	

#### 1. Dynamics 365 Sales - Consulting/Customization

- ✓ Extensively result-driven **services** help businesses transform various business operations.
- ✓ Assist clients with Dynamics 365 implementation
- ✓ Successfully maintain quality customer services, enhance customer acquisition, conversion, and retention.
- ✓ Customize the applications to deliver the best solutions
- ✓ Help different organizations to transform the business by earning profit and reducing costs.
- ✓ Offer customization such as adding new fields, custom workflows, data collection and data processing.
- ✓ Create and customization of schema features, metadata, business logic, design user-friendly dashboards, forms and views, notification templates, and optimization.

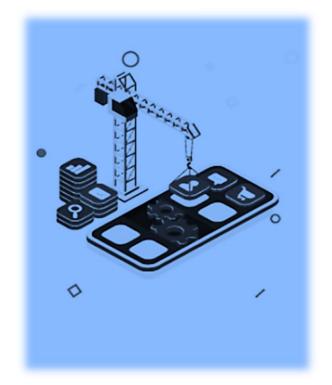


#### 2. Dynamics 365 Sales – Power Platform Development

For each module Dynamics 365, we offer:

- ✓ Custom solution development via power apps, process automation/workflow management
- ✓ Turn ideas into organizational solutions by enabling everyone to build custom apps that solve business challenges by using power apps (canvas & model-driven)
- ✓ Boost business productivity to get more done by giving everyone the ability to automate organizational processes by using **Power Automate**
- ✓ Dashboard-graphs implementation via **Power BI** & make informed, confident business decisions by putting data-driven insights into everyone's hands.
- ✓ Easily build chatbots to engage conversationally with your customers and employees by developing intelligent chatbots via **Power Virtual Agents**.





- 3. Dynamics 365 Sales Mobility Solutions
- ✓ Custom development for almost every type of computer device.
- ✓ Advanced structural development service for different kinds of devices like:
  - o Dynamics 365 for phones
  - o Dynamics 365 for tablets
- ✓ Adopt Native App Development Approach for different devices
- ✓ Choose modern Front-end frameworks to make the solution compatible with every device operating with any modern operating system.







#### 4. Dynamics 365 Sales - Custom Integration

- ✓ Helped several organizations to migrate data from CRM solution to Dynamics
   365 CRM in a cost-effective manner.
- ✓ Incorporate the best practices and methodologies to map and move data from target CRM to Dynamics 365.
- ✓ Integrates Dynamics 365 with third-party applications and ERP systems to fulfill the rising demands of businesses.
- ✓ Streamline business analysis and integration for data syncing & data migration from 3<sup>rd</sup> party apps







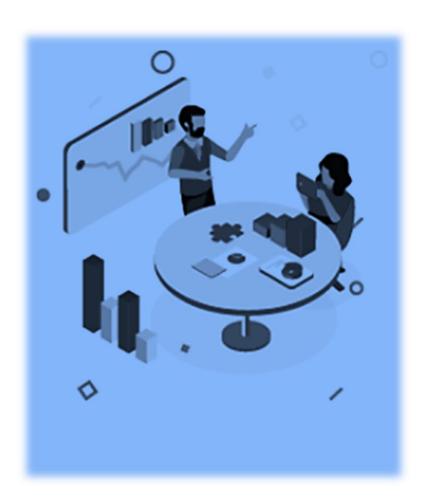
#### 5. Dynamics 365 Sales - support

- ✓ Technical, functional as well as production support for the implementation of Microsoft Dynamics 365 CRM.
- ✓ Post-implementation support service assistance.
- ✓ Assist clients in solving arising or reoccurring issues to ensure the smooth operation of the app.
- ✓ Great ROI with Microsoft Dynamics support, 2managed services offering represent a significant saving.
- ✓ In-depth assistance and consultancy across all CRM related requirements





- 6. Dynamics 365 Sales User Training
- ✓ Highly experienced in designing, developing, and delivering custom-made, client-branded, collaborative learning solutions for any Dynamics 365.
- ✓ Develop training programs for users of any module of Dynamics 365 that reflect their way of working, incorporating the individual business processes and workflows for each role group.
- ✓ Training services include:
  - 1. Training needs analysis (TNA)
  - 2. Development of custom-made deliverables including reference guides, quick cards, trainer packs, and three different eLearning options
  - 3. Assistance with Skill the Trainer and Go-Live Support
  - 4. Delivery in the form of classroom, presentation, eLearning, and various online solutions
  - 5. Localization and translation services for global Dynamics 365 rollouts



#### 7. PowerApps Component Framework – PCF for Dynamics 365 Sales

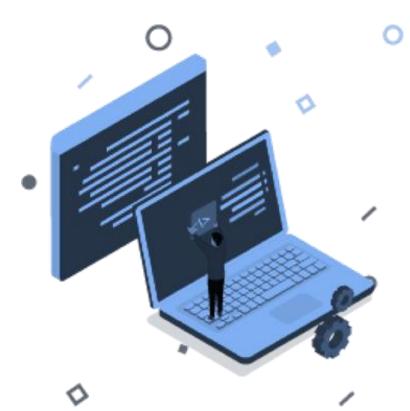
- ✓ Enhanced user experience for the users to work with data on forms, views, and dashboards
- ✓ Create code components that can be used across the full breadth of Power Apps capabilities
- ✓ Utilize the reusability of the code components
- ✓ Reuse these components many times across different tables
- ✓ Forms which provide support of modern web practices.
- ✓ Reusability, Access to a rich set of framework APIs that expose capabilities like:
  - 1. Component lifecycle management,
  - 2. Contextual data,
  - 3. Metadata Seamless server access via Web API;
  - 4. Utility and data formatting methods;
  - 5. Device features like camera, location, and microphone; and easy-to-invoke user experience elements like dialogs, lookups, and full-page rendering.



#### 8. Open Source - TypeScript - Based Development for Dynamics 365 Sales

- ✓ We provide the services of the execution of the custom functionality for each module of Dynamics 365
- ✓ Using TypeScript to streamline the custom business requirements of the clients
- ✓ Supported by the dynamics by default but provide a way of extension.
- ✓ While the execution of the TypeScript code, entities and form attributes are accessed and actions can be performed:
  - 1. Form context
  - 2. XRM Web API,
  - 3. support of support HTML,
  - 4. CSS,
  - 5. JavaScript and TypeScript,
  - 6. React.js,
  - 7. Angular.js,
  - 8. Vue.JS,
  - 9. Ember.JS,
  - 10. Backbone.js





#### 9. Dynamics 365 Sales - Plugin Development

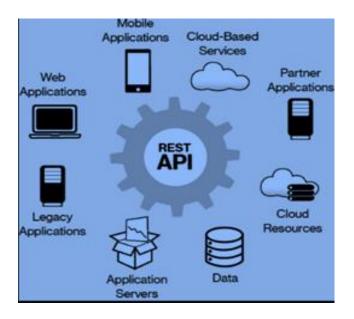
- ✓ A .NET assembly that could be uploaded to the Microsoft data verse, custom business logic, integrate with Dynamics 365 Customer Engagement
- ✓ Leverage the advancement of .Net framework
- ✓ Help out the organizations to take, out of the box customization to make maximum benefits.
- ✓ Use the event pipeline to initiate the execution.
- ✓ Based on requirement, plug-ins can be configured to execute synchronously or asynchronously.
- ✓ Synchronous plug-in will cause the operation to wait until the code in the plug-in completes.
- ✓ Lasses within the assembly can be registered to specific events (steps) within the event framework.
- ✓ The operations in an asynchronous plug-in are placed in a queue and are executed after the operation.





#### 10. Dynamics 365 Sales - RESTAPI development

- ✓ Provides a development experience, used across a wide variety of programming languages, platforms, and devices.
- ✓ API implements the Odata (open data protocol), version 4.0, an OASIS standard for building and consuming restful APIs over rich data sources.
- ✓ Data management framework's package API uses OAuth 2.0 to authorize access.
- ✓ Make it easier to integrate software and business applications into any company's sales and marketing platform.
- ✓ Include managing all business operations and customer-facing features.
- ✓ Newer & more flexible, come with default implementation.





### **Contact us**

Dynamics 365 Sales Consulting Services of **Cognitive Convergence** offers strategic opportunities to clients, investors, and partners that is:

- ✓ Unique and industry defining
- ✓ Mutual interest centric business approach
- ✓ Significantly enhance company's footprint
- ✓ Turn grow revenues by entering new and exciting Technology Domains, App development ideas, Solution Development, and Joint venture projects
- ✓ 1st mover advantage with
  - o Talent: 100%
  - o Timing:100%
  - o Technology: 100%
  - o Technique: 100%



### **THANK YOU**

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shahzad@cognitiveconvergence.com



For questions or queries, contact us, we will be sure to get back to you as soon as possible.