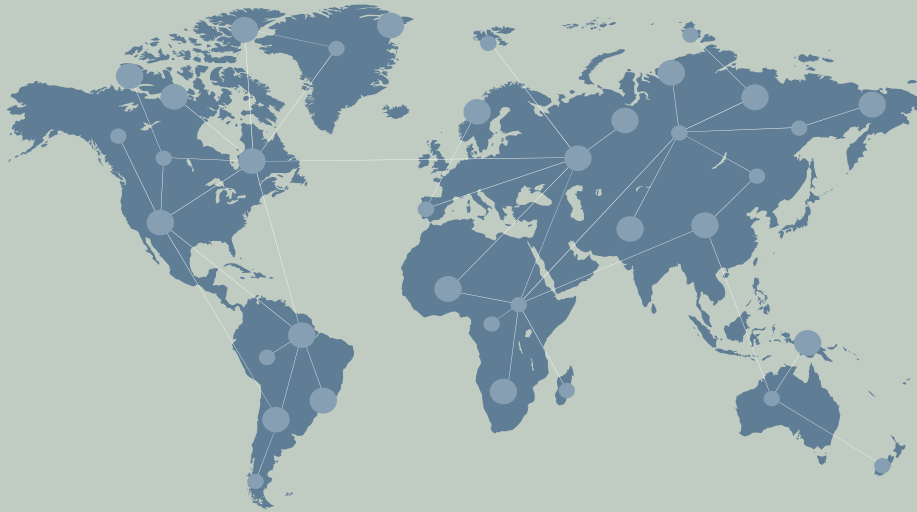


Make your Organization Modern, Unified, Intelligent and Adaptable

Dynamic 365

Consulting Services

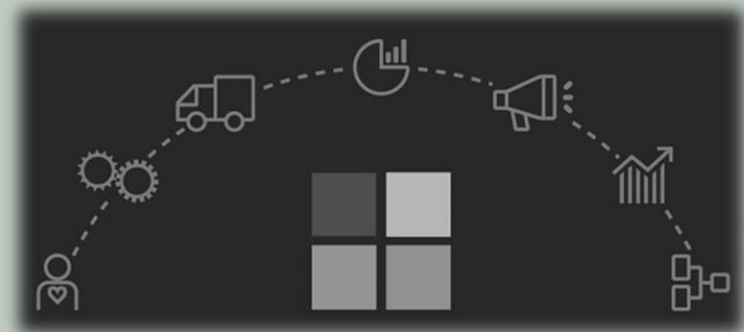


Microsoft Dynamics
365



Cognitive Convergence

[Http://www.Cognitiveconvergence.Com](http://www.Cognitiveconvergence.Com)



About Us



Cognitive Convergence is Subject Matter Expert in Office 365, Dynamics 365, SharePoint, Project Server, SAAS, Power Platform: Power Apps-Power BI-Power Automate-Power Virtual Agents

Our Core Dynamics 365 services includes the following

- ✓ Dynamics 365 – Cloud /On-premises
- ✓ Finance, Supply Chain Management, Customer Service, Marketing, Sales, Talent, AI, MR, Project Operations, Field Service, Commerce
- ✓ Customization in Dynamics 365 Solutions
- ✓ Business Consultancy
- ✓ Dynamics 365 development
- ✓ Dynamics 365 Add-in
- ✓ Rest API Development
- ✓ Developing components, controls and plugins
- ✓ Business Operations respective to the organizations

Current Location: Lahore, Pakistan

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



Customer Service

- ✓ Customer service automation
- ✓ Provides a wide range of features from automated case management to dashboards and reports
- ✓ Strong competitive advantage for the business
- ✓ Handles contracts, resources, work hours, unified service desk (USD), contacts, accounts, case management, and custom entities.

Our related consulting offerings

- ✓ Track customer issues through cases.
- ✓ Record all interactions related to a case.
- ✓ Share information in the knowledge base.
- ✓ Create queues, and route cases to the right channels.
- ✓ Create and track service levels through service level agreements (SLAs).
- ✓ Define service terms through entitlements.
- ✓ Manage performance and productivity through reports and dashboards.
- ✓ Create and schedule services and much more
- ✓ 2 main service functions - Service Management and Service Scheduling



Sales

- ✓ Support the sales process from lead acquisition to close of sale.
- ✓ Track the follow-up communications (Phone Calls, Emails, and Appointments)
- ✓ Single source of truth for sales, marketing, and account management teams.
- ✓ Empower sellers to build relationships with authentic and personal engagement
- ✓ Get additional AI-driven insights to grow sales
- ✓ Innovate with sales solutions built to evolve.

Our related consulting offerings

- ✓ 360-degree view of interactions with prospects and customers
- ✓ Opportunity management
- ✓ Quote Management
- ✓ Order Management
- ✓ Invoice Management
- ✓ Sales Business Process
- ✓ Boost seller productivity with seamless tools
- ✓ Improve sales performance
- ✓ Enable smarter selling with embedded insights.

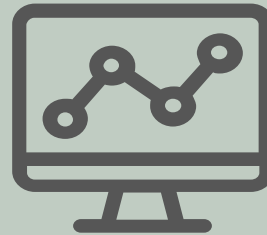


Finance

- ✓ Connect with Dynamics 365 applications and Office 365
- ✓ Deliver the best finance, development, management and implementation experience possible with a cloud ERP system.
- ✓ Improve financial controls, accelerating cash-flow, reduce days' sales outstanding, and achieving corporate compliance.
- ✓ Monitor performance of global financial operations
- ✓ Centralized source for financial information that saves time and enables faster and more informed decisions.

Our related consulting offerings

- ✓ Strategize, Automate and Unify the business processes
- ✓ Manage Global finances
- ✓ Real-Time Performance
- ✓ Forecast Future Outcomes to drive growth
- ✓ Out-of-the-box reports
- ✓ Strategic impact and reduce costs
- ✓ Global electronic reporting
- ✓ Accelerate business process changes, seamlessly integrate with legacy systems
- ✓ Decrease global financial complexity and risk

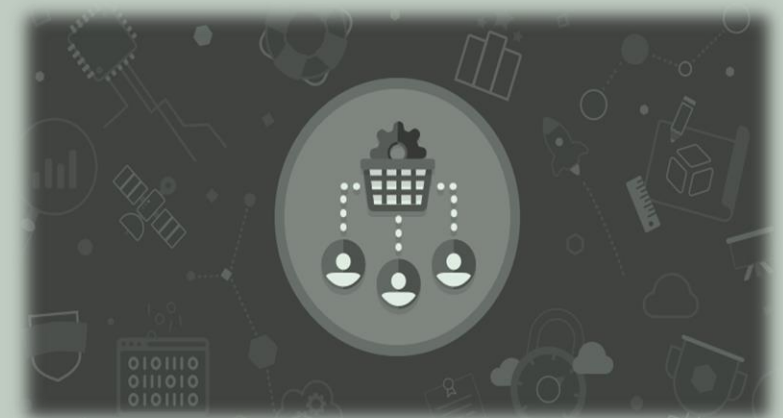


Supply Chain Management

- ✓ Streamlines end to end production oversight
- ✓ Delivering intelligent insights on every transaction, from ordering, to warehousing, to transport, to final delivery.
- ✓ Connect sales and purchasing processes with logistics, production, and warehouse management to provide visibility and management throughout the supply chain.
- ✓ Enable streamlined vendor collaboration and manage distributed organizations with inter-company and multi-site capabilities.
- ✓ Maximize operational efficiency, product quality and profitability.

Our related consulting offerings

- ✓ Automate from planning and production to delivery and services
- ✓ Optimize the systems, processes, and operations
- ✓ Innovate intelligent manufacturing
- ✓ Asset management
- ✓ Cost accounting
- ✓ Cost management
- ✓ Inventory management
- ✓ Procurement and sourcing
- ✓ Product information management
- ✓ Production control
- ✓ Service management
- ✓ Transportation management
- ✓ Warehouse management

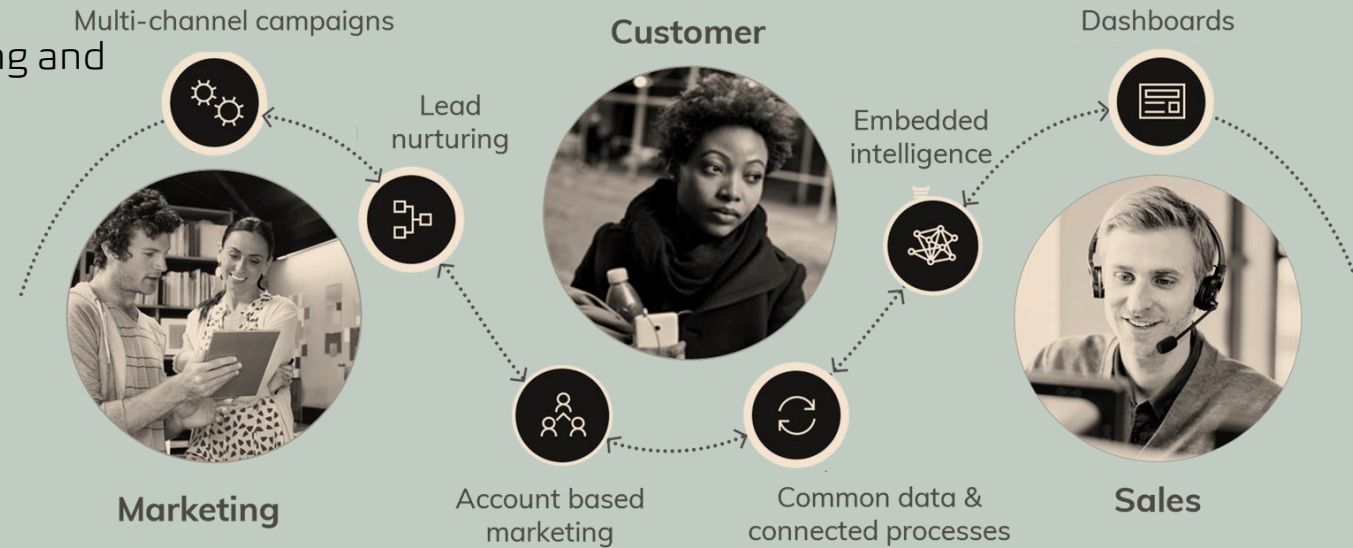


Marketing

- ✓ Unifies customer information
- ✓ Provides marketing automation features such as lead scoring and customizable email templates
- ✓ Create personalized customer journeys
- ✓ Conduct multichannel marketing activities
- ✓ Personalize communication with customers
- ✓ Evaluate and continuously improve marketing performance

Our related consulting offerings

- ✓ Lead scoring automation
- ✓ Informed marketing analysis and decisions
- ✓ Email management
- ✓ Marketing forms and pages
- ✓ Customer segmentation, customer journeys
- ✓ Event management
- ✓ On-brand email templates
- ✓ Customer journey mapping

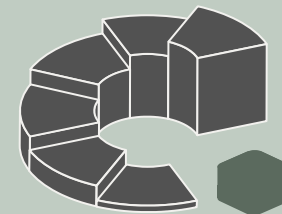
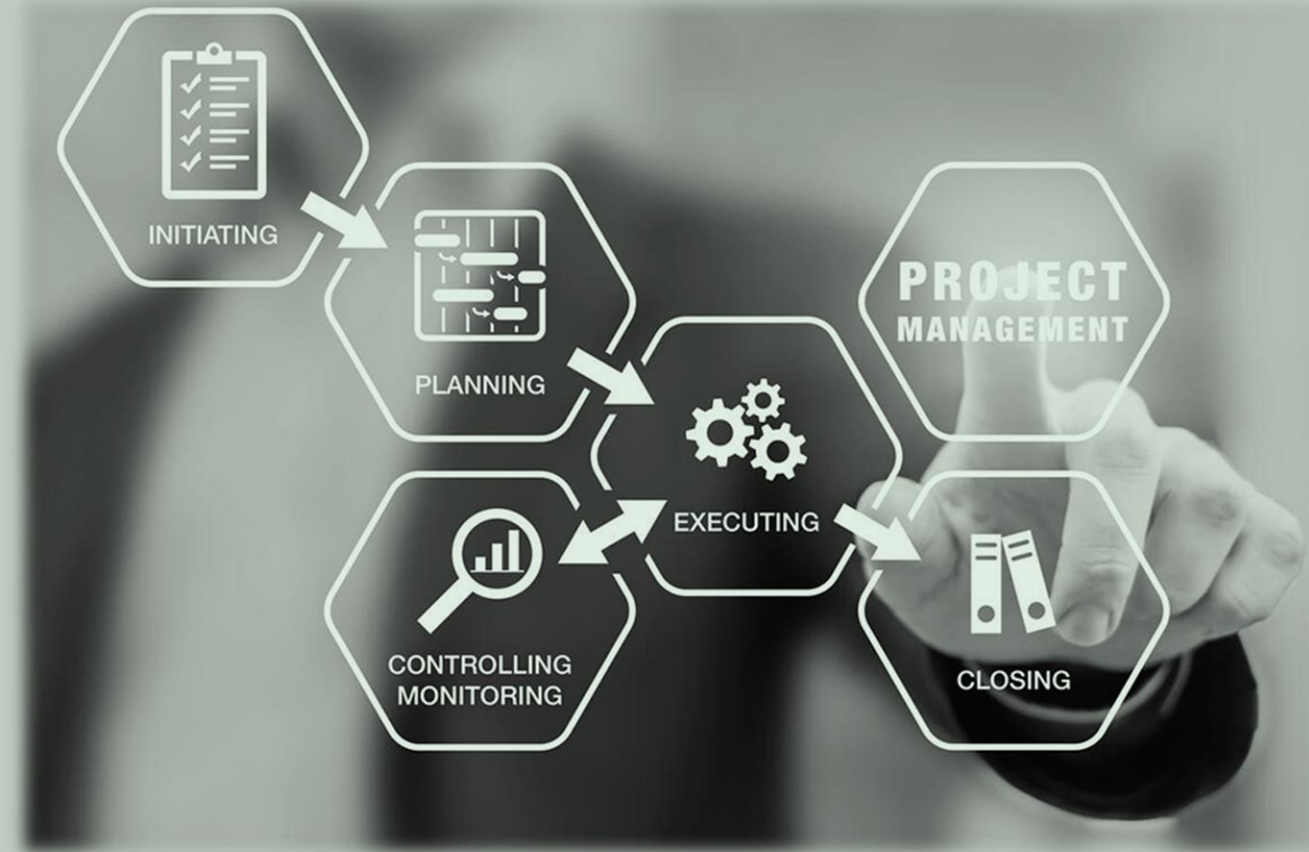


Project Operations

- ✓ Unifies operational workflows
- ✓ Provide the visibility, collaboration, and insight needed to drive success across teams, from prospects to payments
- ✓ Connects the teams from initial quote to project accounting
- ✓ Accelerate delivery, empower employees, and maximize profitability.
- ✓ Customizable and extendable across the power platform.
- ✓ Gives insights of every aspect of any project starting right from when the quote is submitted to the project analytics.

Our related consulting offerings

- ✓ Unifying teams around actionable data.
- ✓ Sales quotes
- ✓ Resource utilization
- ✓ Project management visualization
- ✓ Time and expense reporting
- ✓ Project costs
- ✓ Project analysis
- ✓ Simplify project accounting through finance

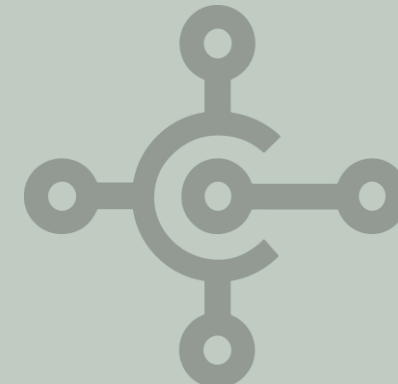
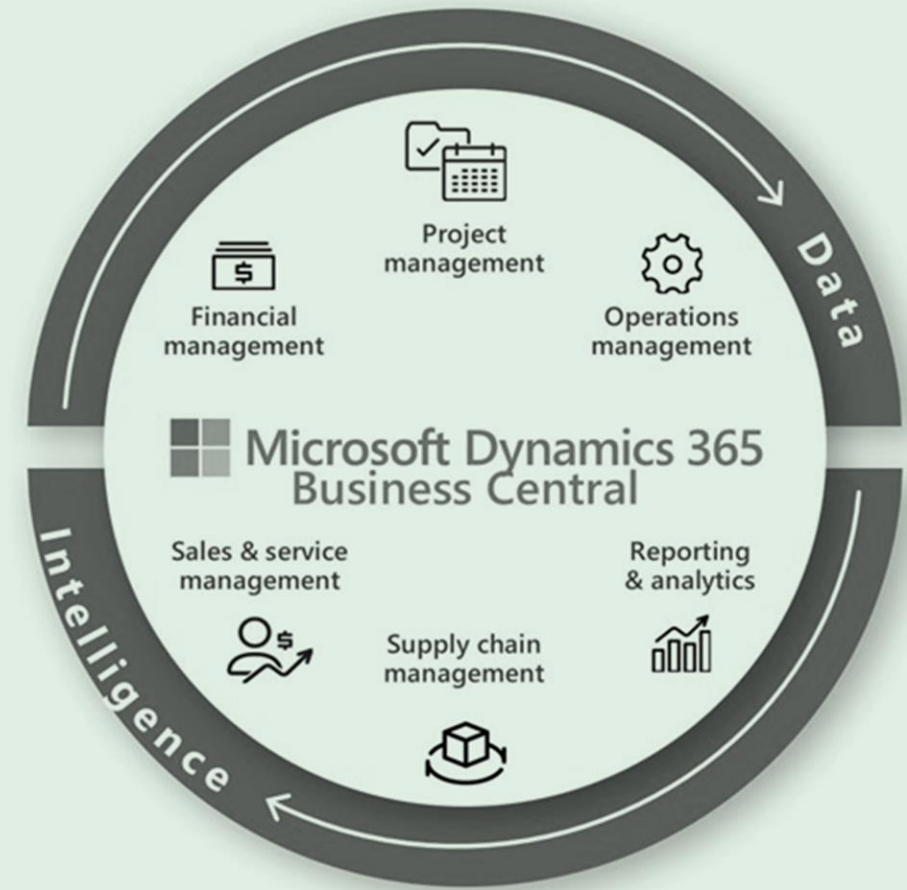


Business Central

- ✓ Business management solution for small and mid-sized organizations
- ✓ Automates and streamlines business processes
- ✓ Helps to manage business operations
- ✓ Enables companies to manage their business, including finance, manufacturing, sales, shipping, project management, services, and more.
- ✓ Provides easy financial management

Our related consulting offerings

- ✓ Connect data across business functionalities like accounting, sales, and purchase
- ✓ Increase financial visibility
- ✓ Optimize supply chain
- ✓ Boost sales and improve service
- ✓ Deliver projects on time and under budget
- ✓ Protect data and support GDPR compliance
- ✓ Enable SMEs to succeed in digital era

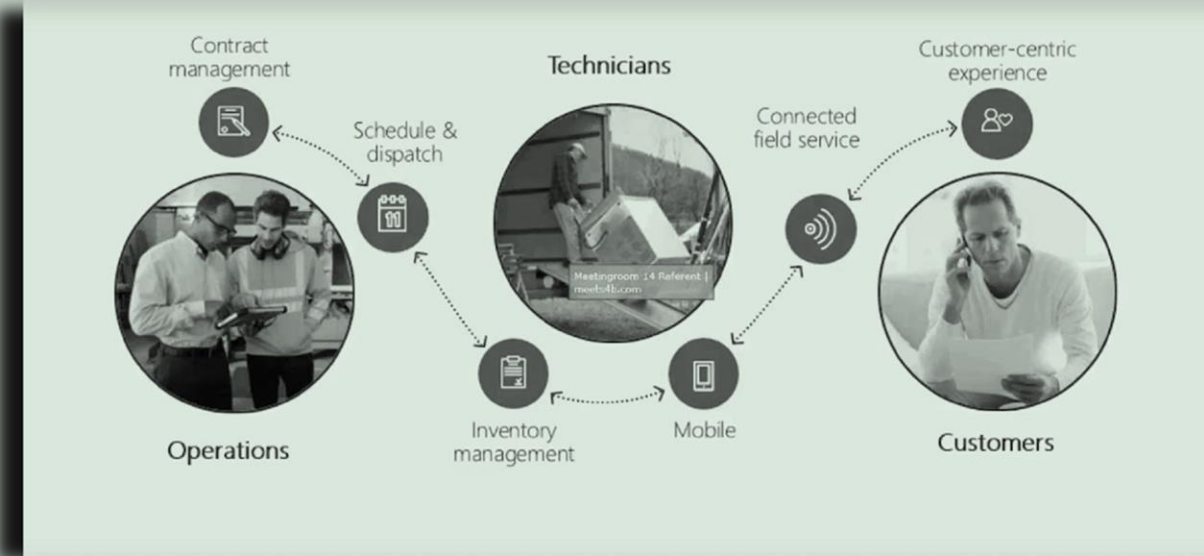
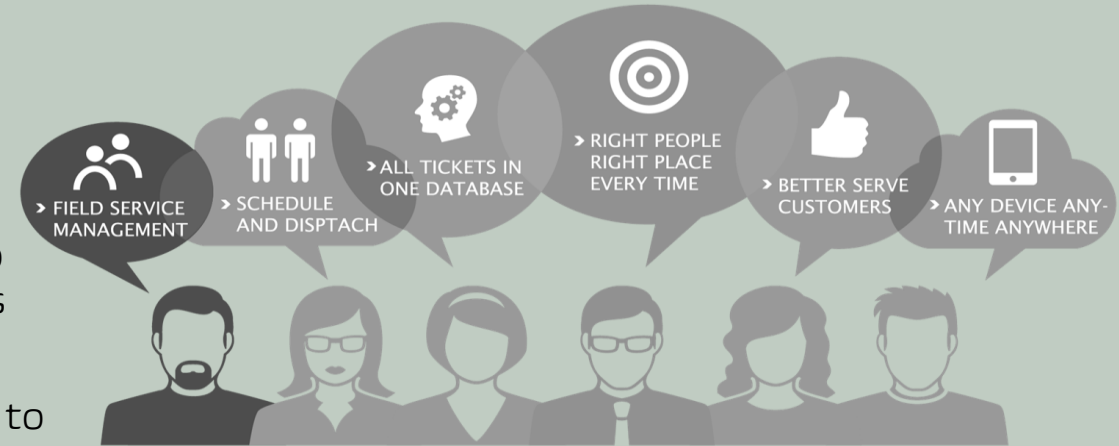


Field Service

- ✓ Helps organizations deliver onsite service to customer locations.
- ✓ Combines workflow automation, scheduling algorithms, and mobility to set mobile workers up for success when they are onsite with customers fixing issues.
- ✓ Include installation, scheduled or recurring maintenance, or responding to break/fix issues.
- ✓ Commonly used for utilities, healthcare, equipment maintenance and manufacturing

Our related consulting offerings

- ✓ Schedule optimization
- ✓ Asset management
- ✓ Invoice processing
- ✓ Improve first time fix rate
- ✓ Complete more service calls per technician per week
- ✓ Schedule onsite visits when it's convenient for the customer
- ✓ Reduce travel time, mileage, and vehicle wear and tear
- ✓ Organize and track resolution of customer issues
- ✓ Provide accurate account and equipment history to the field technician
- ✓ Keep customers updated with the status of their service call and when it's resolved
- ✓ Avoid equipment downtime through preventative maintenance
- ✓ Manage follow-up work and take advantage of upsell and cross sell opportunities

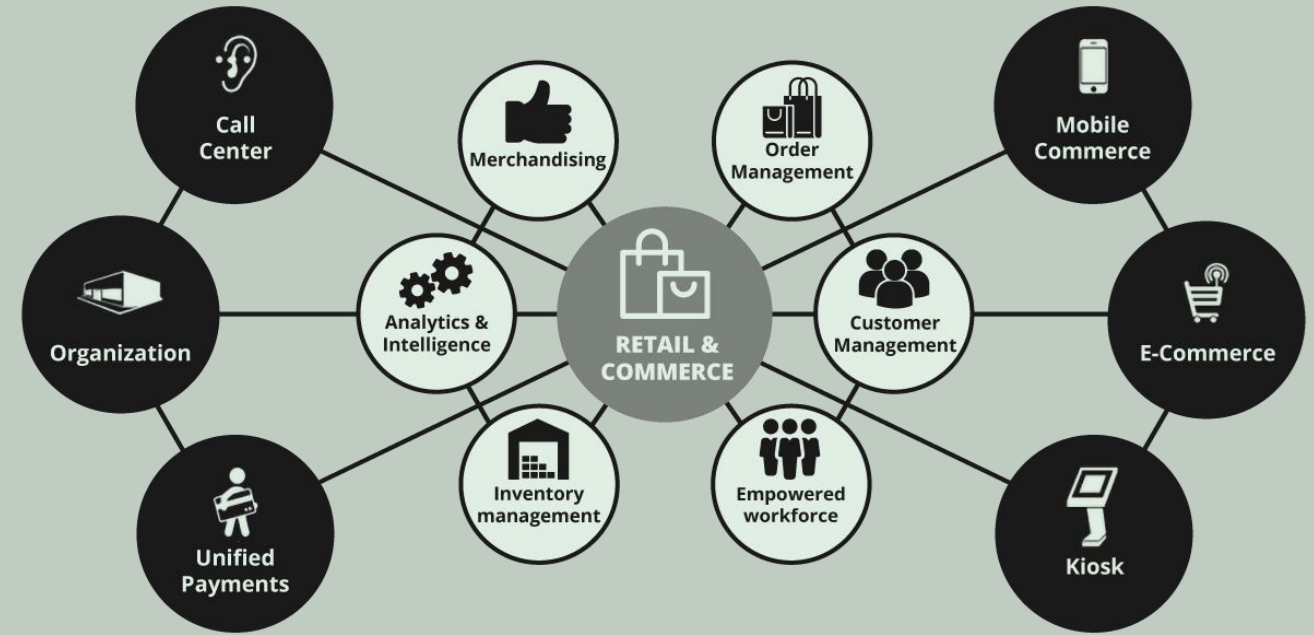


Commerce

- ✓ End-to-end retail solution delivering unified commerce across all channels encompassing sales, mobility, intelligence, and productivity
- ✓ Help retailers and workers achieve more in a cloud first, mobile first world.
- ✓ Cross platform unified point of sale (pos) application
- ✓ Integrated call center capability
- ✓ Commerce experience app (for customers)
- ✓ Integration with 3rd-party e-commerce websites.

Our related consulting offerings

- ✓ Unified Commerce
- ✓ Manage Merchandising
- ✓ Modern Store Experience – Daily Operations, Employee productivity, Inventory management and Consumer convenience
- ✓ Customer Engagement
- ✓ Intelligent Operations Workspaces, reports, Recommendations and Profitability.
- ✓ Adaptable and Secure Platform Integration, Customization, Training, Security and Privacy



Human Resources/Talent

- ✓ Cloud-based Human Capital Management (HCM) solution.
- ✓ Takes time-consuming HR tasks and streamlines them into easy processes
- ✓ Enabling human resources professionals to focus on strategic projects
- ✓ Seek out the highest skilled talent in the market and attract them to organization
- ✓ Transforms HR department by providing insight into retention, productivity, and performance.

Our related consulting offerings

- ✓ Ability to run on mobile devices and tablets
- ✓ Drive operational excellence
- ✓ Setup employees for success
- ✓ Hire the right people faster
- ✓ Functionality of "Attract"
- ✓ Functionality of "On-Board"
- ✓ Optimizing HR Programs
- ✓ Enable Workforce insights
- ✓ Improve Organizational agility



Customer Data Platform

- ✓ Solves the problem of disconnected customer data systems
- ✓ Key to delivering the right engagement for the right person at the right time
- ✓ Personalizing every customer touchpoint from marketing to sales to service.
- ✓ Unify a wide variety of customer data including
 - Historical
 - Contextual
 - Demographic
 - Behavioral Information

Our related consulting offerings

- ✓ Create Marketing Customer profile
- ✓ Create Sales Customer profile
- ✓ Equip customer service representatives with 360-degree customer profiles
- ✓ Data Access Type Customer Data Platform (CDP)
- ✓ Analytics Type CDP
- ✓ Campaign Type CDP
- ✓ Unified Customer Data
- ✓ Persistent Storage
- ✓ Delivered as Packaged Software
- ✓ Real-Time Capabilities
- ✓ Data Activation and Open Access
- ✓ Segmentation – Rule and machine learning based segmentation
- ✓ Provide support to comply with privacy laws such as GDPR and CCPA.

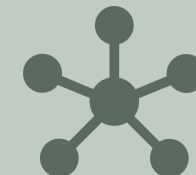


CUSTOMER DATA PLATFORM



- ## Our related consulting offerings

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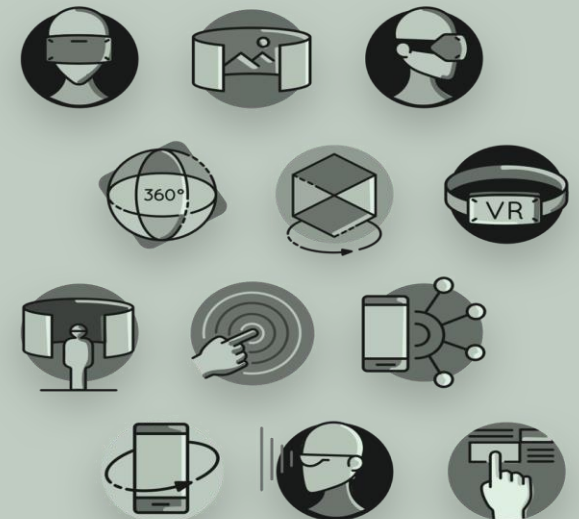


Mixed Reality

- ✓ Interaction with digital objects and environments instead of with the physical world
- ✓ Transform business operations
- ✓ Improve cross-team collaboration with technology
- ✓ Allows employees work together from a shared perspective

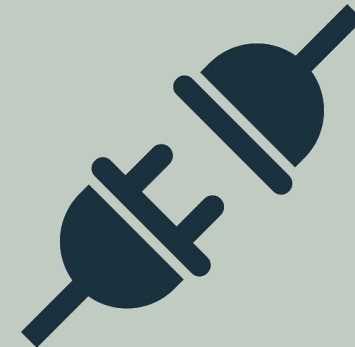
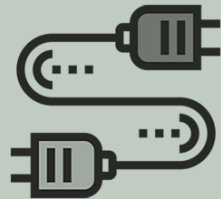
Our related consulting offerings

- ✓ Empower employees and optimize operations
- ✓ Mixed Reality Applications
 - Dynamics 365 Guides
 - Dynamics 365 Remote Assist
 - Dynamics 365 Product Visualize
- ✓ Mixed Reality with HoloLens
- ✓ Solve business Problems and bring physical and digital world together
- ✓ Provide holographic instructions when and where they are needed
- ✓ HoloLens app to connect the instruction cards
- ✓ Holograms to connect the physical workspace



D365 Development trends – Custom Plugin Development

- ✓ Modify or extend or argument the standard behavior of your Dynamics 365 platform through plugin
- ✓ Handlers for events fired by Dynamics 365 Customer Engagement
- ✓ Execute any business logic
- ✓ Call an external web service on certain event
- ✓ Dynamically calculate the field values
- ✓ Automate processes
- ✓ Implementing customized logic around entity actions:
 - Create
 - Update
 - Delete
 - Associate
 - Disassociate
- ✓ Synchronous and asynchronous plugin requests



D365 Development trends – Rest API Development

2 Rest APIs for Customer Engagement

- ✓ Web API
- ✓ Online Management API

Our related consulting offerings

- ✓ Web API
 - Implement the OData (Open Data Protocol)
 - Replace the Organization service and Organization Data service
 - Integrate by using data packages
 - Cloud Deployment and on-premises deployment
 - Web API for any projects that access Microsoft Dynamics 365 data with code that does not run on the server
 - XmlHttpRequests
 - Composing HTTP requests for specific operations or third-party libraries
- ✓ Online Management API
 - Create and manage Data verse environments in Office 365 tenant
 - Application publishers and ISVs can use the Online Management API
 - Automate the creation of custom demo Data verse environments.
 - Manage multiple Data verse environments in case of multi-org setup in the enterprise.
 - perform various tasks on the environment such as create, retrieve, delete, backup and restore environments, and other environment-related tasks



D365 Development trends – XRM Web API

Development

- ✓ Provides a global object for performing operations
- ✓ Perform any customization related to entities and records management

Our related consulting offerings

- ✓ Navigate forms
- ✓ Create and manage records
- ✓ Execute web API actions and functions in model-driven apps
- ✓ Implementation of different methods as per requirements
 - Create record
 - Delete record
 - Retrieve record
 - Retrieve multiple records
 - Update record
 - Execute
 - Execute multiples

Dynamics 365 v9.0:

Xrm.WebApi – CRUD Operations



D365 Development trends – Power Apps Component Framework

- ✓ Code components included in a solution file and installed in different environments
- ✓ Configured on the Home grid as well as on the sub grid

Our related consulting offerings

- ✓ Build compelling visual components
- ✓ Create fully custom components
- ✓ Custom components having access to a rich set of framework APIs
- ✓ Utilize modern web practices and harness the power of external libraries to create advanced user interactions
- ✓ Fully configurable components
- ✓ After installation, configure fields, sub grids, views, and dashboard sub grids
- ✓ Reusable controls

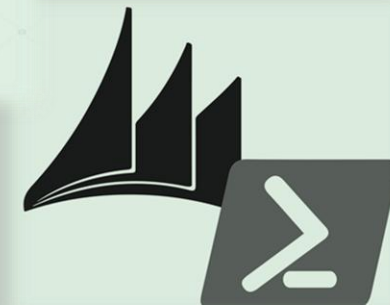


D365 Development trends – Development through SDK

- ✓ Perform common business operations like create, retrieve, update and delete data
- ✓ Connect to dynamics 365 customer engagement using classes provided by software development kit
- ✓ Work with the organization web service (SOAP endpoint)

Our related consulting offerings

- ✓ Create and deploy plug-ins or custom workflow activities
- ✓ Create and deploy custom XAML workflows:
- ✓ Early bound and late-bound programming models for Dynamics 365 Customer Engagement (on-premises) entities.
- ✓ Query data in Dynamics 365 Customer Engagement (on-premises)

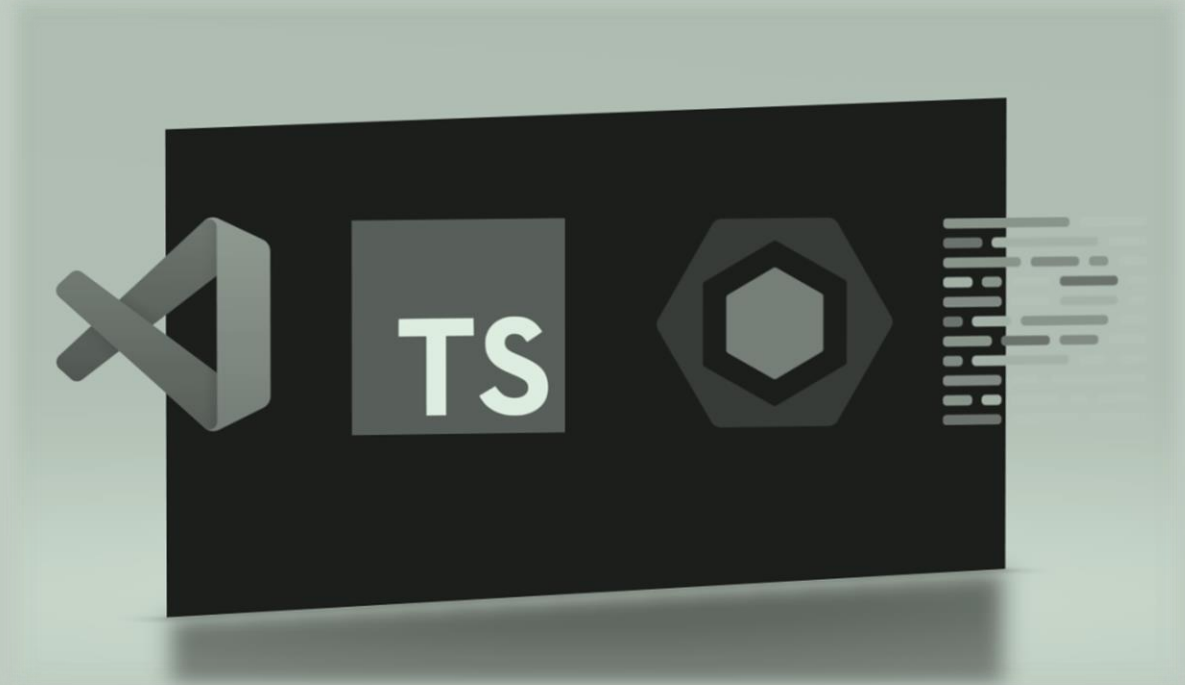


D365 Development trends – Visual Studio, Typescript, Node.js, Angular, React, etc.

- ✓ Perform business operations and integrate with built-in and custom entities
- ✓ Extend dynamics 365 with client-side programming which is more robust and portable
- ✓ Deploy the created web parts in dynamics 365 web resources using libraries

Our related consulting offerings

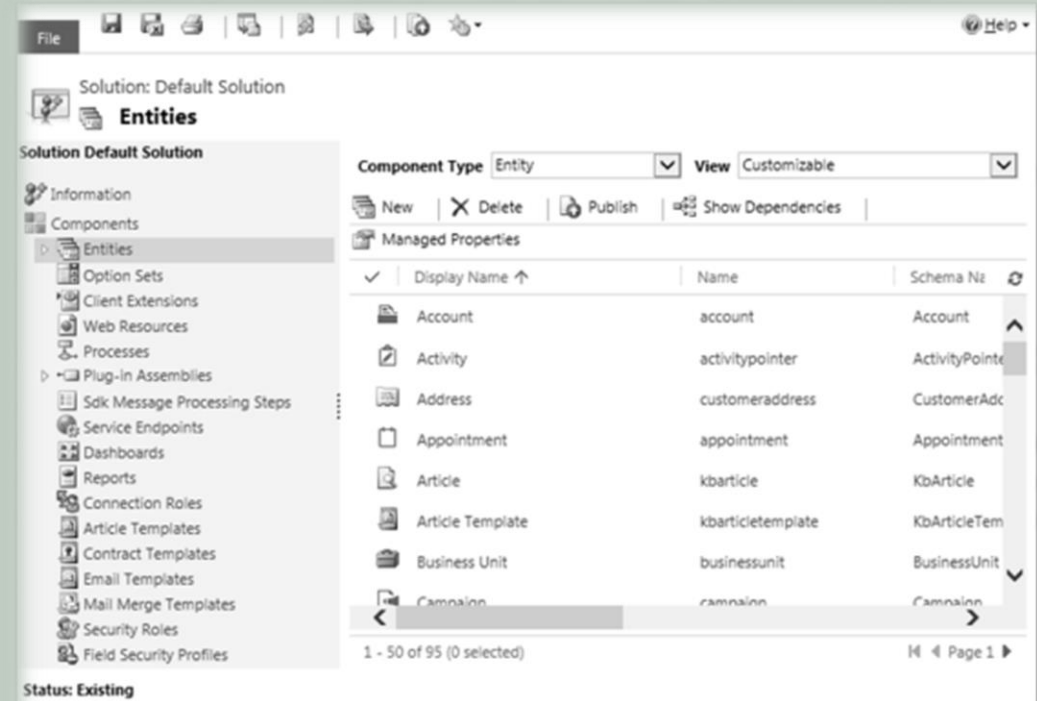
- ✓ Extend functionality of Dynamics 365 modules
- ✓ Embed the code in web resources of dynamics 365 solution from outside dynamics 365
- ✓ Perform any required operation using entities
- ✓ Create UI using any of the following client-side frameworks
 - React
 - Angular
 - Vue
 - Ember
 - Backbone



D365 Development trends – Add-in development



- ✓ Create Dynamics 365 Solutions
- ✓ Create custom entities
- ✓ Create forms, views and business processes
- ✓ Customize default and unmanaged solutions
- ✓ Add web resources to manually customize forms, views using HTML, CSS, JavaScript
- ✓ Use XRM web API to access entities
- ✓ Perform actions and handle events including onclick, onsave, onload, etc.
- ✓ Relate different entities
- ✓ Create model-driven applications.
- ✓ Package the developed add-in as managed solution and export it to be used in different tenants on installation.



Dynamic 365 development, implementation, customization and consultation service, 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 into new and exciting **Technology Domains, App development ideas, Solution Development, and Joint venture projects**
- ✓ 1st mover advantage with
 - ✓ Talent: 100%
 - ✓ Timing: 100%
 - ✓ Technology: 100%
 - ✓ Technique: 100%



Thank you



Shahzad Sarwar



www.cognitiveconvergence.com

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