

AKITA

Intelligent Solutions

Microsoft Dynamics 365 Sales Implementation

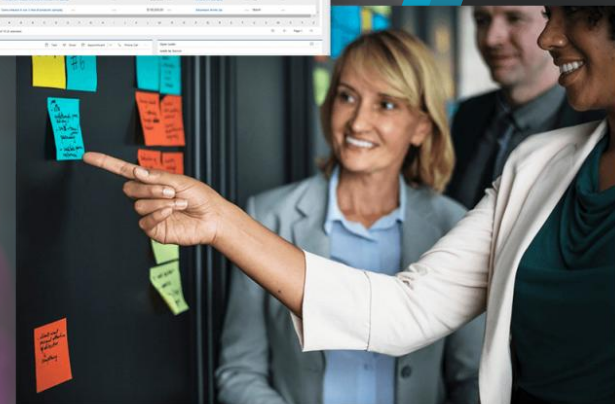
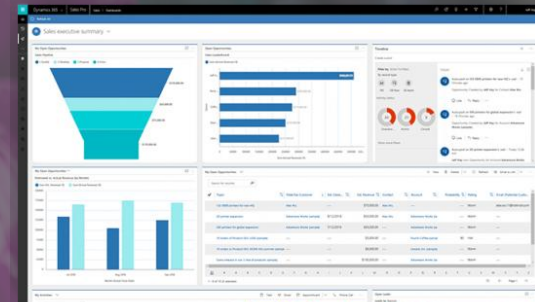
Manage leads, monitor customer accounts and accurately track sales pipelines with Microsoft's market-leading sales CRM solution.

With our packaged deployment, Akita Intelligent Solutions will deploy Dynamics 365 Sales for your, transforming your sales process.

Features of Dynamics 365 Sales

- Professionally manage contact, opportunity and lead information.
- Access information on the go with the Dynamics 365 Sales app.
- Deliver improved communications using Dynamics 365 data directly from Outlook.
- Get AI-driven insights for when prospects are ready to buy.
- Track sales performance and provide more accurate revenue figures.

** Licensing can be provided by Akita at an additional cost and subject to requirements*



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About Akita Intelligent Solutions

As a Microsoft Gold Partner, we deliver bespoke solutions using technologies including **Microsoft Dynamics, SharePoint, Teams** and **Power Platforms** (Power BI, Power Apps, Power Pages and Power Automate).

Sales – Sample Deliverables

Day 1: Core Deployment & Configuration

- Environment Creation
- Locale Settings
- Sales Deployment
- Core Sales Settings
- Corporate Branding
- Currency
- Deploy Sales Accelerator

Day 2: Setup Users

- Create Users
- Setup Security Assignments
- Setup base user settings
- Configure Outlook integration & Outlook app deployment

Day 3: Product Catalogue & Documents

- Creation of Price & Discount Lists
- Creation of Products
- Creation of Price List Items
- Adjustment of OOTB Quote / Order / Invoice Documents
- Provide prerequisites for training

Day 4: Customer Data Import

- Import of Accounts
- Import of Contacts
- Import of Leads
- Import of Opportunities
- Import of Activities

Day 5: Training

- Training users on web interface
- Training users on the Dynamics 365 Sales mobile app
- Training users on Dynamics 365 Outlook add in

Our Approach

Simplify – Understand processes and remove unnecessary steps



Automate – Replace repetitive tasks and remove the need for interaction



Optimise – Use the right technology to achieve more with the same resources



Unify – Bring data out of silo to provide a complete picture of performance and enhance BI



Business Applications