***Week 2***

***Experiencing the platform evolution***

* *Microsoft Dynamics CRM first began in 2001 with the development of dealer point.*
* *Microsoft CRM 1.0 was released in January 2003 then Microsoft CRM 1.2 was released on December 2003 which was not widely adopted by industry.*
* *In December 5,2005 Microsoft Dynamics 3.0 was released.*
* *Dynamics CRM 4.0 a.k.a. Titan introduced in December 2007.It was first version which crossed 1 million user mark in July 2009.*
* *Microsoft Dynamics CRM 2011 was released in February 2011.*
* *Then in November 2013, Dynamics CRM 2013 was released and in September 2014, Dynamics CRM 2015 was announced.*
* *The version for CRM 2016 was 8.0, 8.1 and 8.2 and with the version 8.2 name, Microsoft Dynamics CRM 2016 was changed to Dynamics 365. It was released on November 30,2015.*
* *The latest update called the ‘October update’ was released in October 2018.*

***Modularity for everyone***

* Modularity refers to the extent to which software/web application may be divided into smaller modules.
* The module simply means the software components that are been created by dividing the software.
* Example – Microsoft Dynamics 365, it offers various modules that includes the following functional modules :-

1. Dynamics 365 for sales
2. Dynamics 365 for customer service
3. Dynamics 365 for project service automation
4. Dynamics 365 for field service
5. Dynamics 365 for marketing

* To define a modular system, several properties or criteria are defined by Meyer. Some of them are :-

1. Modular decomposability
2. Modular composability
3. Modular understandability
4. Modular continuity
5. Modular protection

***Dynamics 365 application elements***

* Modular design

The modules which is provided in Dynamics 365 are sales hub, customer service hub, field service, project service, resource scheduling. All modules leveraging the unified interface are built to leverage the modular model.

* Business process flow

In this when we get a lead we feed all the data in lead section then if that lead in interested in doing business with you then that lead is converted into opportunity then if qualifies then it is sent for the development and then propose and at last we close the business.

* Dashboard

Dashboards in Dynamics 365 are visual components that allow users quick access to aggregated data in a system. Dashboards comprise various elements including pie charts, grids, all opportunities , open opportunities, open leads, won opportunities, my activities, web resources.

***The extensibility options***

Extensibility means how easy it is to expand a product’s feature set. Extensible products are designed for ease in expanding your installation’s feature set and integrating with third-party software.

Example :- Custom business logic is a plugin which can be used with Dynamics 365 customer engagement(on premises).

***Understanding platform navigation***

With the introduction of the various hubs and the application model, leveraging the Unified Interface, the navigation is now fully configurable to reflect only the necessary elements for a specific application. The application has a side blade which has the options like home, recent, dashboard, activities, accounts, contacts, leads, opportunities, competitors, collateral, marketing, performance and service.

***Exploring the modular concept***

* CDM is a metadata-driven layer that simplifies data integration and sharing across various apps and platforms by providing a set of common data entities.
* CDM provides a set of standard core entities :-

1. Account
2. Contact
3. Activity
4. Owner
5. Currency
6. Task

***Reviewing the Dynamics 365 Sales app***

MS Dynamics 365 has separated the various functional modules into distinct applications, available for purchase in a modular way. The Microsoft Dynamics 365 for Sales module facilitates sales teams in managing leads and opportunities.

Sales Hub is the core application that handles the Sales functionality. The Sales module is comprised of a set of entities, processes, dashboards, and reports, as well as the ability to see the products and services offered and the associated sales literature.

***Understanding Sales-specific entities***

Sales-specific entities are entities that are used mainly within the Sales module. Some of these include **Leads, Opportunities, Competitors, Quotes, Orders, Invoices, Products, Sales Literature,** and **Goals.**

* **Lead** :- A lead is a representation of a person or organization interested in the company’s products or services.
* **Opportunities** :- The opportunity is meant to capture a potential sale for an existing customer. An opportunity is created directly after qualifying a lead.
* **Quotes** :- A quote represents an offer of products or services at a predetermined price. Payment terms are associated with the respective quote.
* **Orders** :- Orders are created from a quote or directly as a new order. A quote which has been accepted by a customer is a order.
* **Invoices** :- An invoice represents the next step in the process.

***Standard Sales processes***

It is a predefined process that a user has to follow path to completion and to track progress in a visual way. Two sales processes are included as part of the sales module. These two processes are as follows :

1. Lead to opportunity sales process
2. Opportunity sales process

***Reviewing Sales dashboards***

There are three default dashboard available in sales dashboard. They are as follows :-

1. Sales Activity Dashboard
2. Sales Activity Social Dashboard
3. Sales Dashboard

***Leveraging Sales reports***

Leveraging sales report means how you will end up customizing your own reports. The standard reports revolve around accounts and contacts and also activities, leads, sales history and sales pipelines. In this we can present data in form of charts, dashboard.

***Marketing features***

In this we can create our own marketing lists and generate quick campaigns. There are two features of marketing which is located in the sales navigation menu i.e. :-

1. Marketing Lists
2. Quick Campaigns