

DTT Mid 2 Complete

CRM Intro:

CRM systems:

Dynamics 365, Sales, Marketing, Customer Service, Field Service, Project Service

CRM: Customer Relationship Mngmnt.

(To build relationship with customers and manage the relationship)

→ interacts with customer

→ sales, marketing, customer support team are connected.

e.g: Daraz, foodpanda record feedback (part of CRM).

MS Dynamics 365 CRM:

Sales (Leads aur deals close Krne Kiye)

Marketing (For promotion)

Customer Service (Support & Complaints)

Field Service (Site based Services Ke Liye)

Project Service (project delivery & timelines Ke liye)

Amazon e.g.
Quote
Order
Invoice

Sales overview

- 1) Lead (Customer shows interest)
- 2) Opportunity (Real chance of sale)
- 3) Quote (Formal Price Offer)
- 4) Order (Customer Confirmation)
- 5) Invoice (Payment Process)

e.g. Car ShowRoom

Lead ← empty 2nd
Opportunity ← interested 3rd
Quote ← قیمت لگانا
Order ← confirm 5th order
Invoice ← payment

Opportunity & Product lifecycle:

- Create (product bnaye)
- Revise (update Kia)
- Revert/Clone (copy bnai)
- Retire (Product close)

Goals & Analytics:

- Goals set kiye jate hain ta k performance track hoske
- Analytical option do analysis of sales

Microsoft Dynamics 365 Marketing:

→ Marketing At Glance:

-) Real time Marketing: respond to customers in real time
-) Outbound Marketing: ads & campaign
-) Event Planning: Manage event, public conversations

A/c Based Marketing:

- 1) A/c based journeys:
- 2) A/c based personalization of content:
- 3) A/c insights:
- 4) A/c based lead & lead scoring:
Generate leads that are related to accounts & score

Type Of Data:

- 1) Behavioural Data: Customer actions
(emails open krna, link click krna)
- 2) Profile Data: Customer details.

Types Of Segments:

- 1) Static Segment: Fixed contact list
- 2) Dynamic Segment: Auto-update hoti hai log ke base pe.

e.g.

Student create to auto ~~add~~ add hojai

Marketing Email Design:

- Choose Template
- Edit text
- Add logo
- Preview
- test email

Customer Journeys: show krti hai customer ka path

first contact → purchase → feedback

Social Media Marketing:

LinkedIn, Twitter pr direct post
schedule, publish

Event Management:

-) Create Event
-) Agenda, Registration forms, attendance tracking
-) Teams Webinar integrate Krna
-) Make event website.

Marketing Insights:

Analytics form mai dikhte hain -
Kis email ne sabse zyada clicks liye,
Kis event mai Kitne register hue.

CUSTOMER SERVICE:

mai cases handle Kiye jate hain

Core Component:

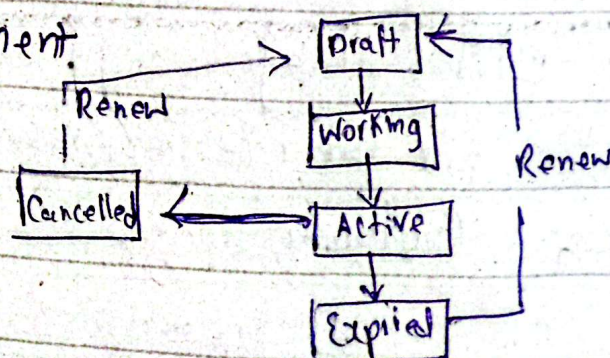
- 1) Customer person ya company
- 2) Case complaint/request
- 3) Activity call/email.
- 4) Entitlement how much support
- 5) SLA service level agreement

- 6) Knowledge Base FAQs aur solution.
- 7) Queue pending cases list.
- 8) Asset customer ka product.

e.g: phone warranty claim krte ho, to wo ek "case" hota hai CRM mai; SLA define krta hai 3 din mai

Case lifecycle :-

- Case Creation
- Case Mngmnt
- Case hierarchies (Parent Child)
 - Cascading:
 - None
 - Close all childs with parent
 - Parent cant close until child
- Case Merging
- Queues
- Entitlement



Knowledge Management (Articles)

create → approve → publish → retire

Routing & Queues

Cases Automatic assigned based on skills
Workload.

→ Unified Routing smartly distribute
Workload.

Analytics Dashboard:

dashboard se SLA ~~related~~
breach, resolve cases, aur average response
time dekha ja sakti hai

Field Service :-

service at customer location.

Obj :-

- Technician travel time reduce
- Work Order Manage
- First time fix rate rate improve krna
- To Keep Customer Update.

Work Order Life Cycle:

- Create Work Order
- Schedule
- Dispatch Technician
- Complete Service
- Close Work Order.

Schedule Board: Task of Technician assigns.

Next Slide CRM Dynamics.

SOLUTIONS:

- Manage Instances and Applications
- Introducing Sol

→ (container jisme customization store krte hain)
e.g: entities, forms, workflows etc

Default Sol: har environment k saath data hai.

Publisher & Prefix: (to identify developer who made customization)

Pipeline: Automate Solutions deployment
dev → test → production environments etc.

Building Model Driven App:

- Create Model Driven App
- Configure
 - Configure SiteMap
 - Selecting Components for an App
 - Sharing Model Driven App.

- built on data & business logic
- App Designer have components (entities, dashboards, views) select krte ho.
- Sitemaps: define krta hai navigation (left menu)

Customizing Entities & Fields.
Entity Types, Attributes. → Table → col

Data Type:

- Single Line of Text / Multiple Line of text
- Option Set
- Two Option
- Image
- Whole no / Floating / Dec / currency
- Date / Time
- Lookup / Customer / File.

- Form Configuration
- Add Control & fields to forms
- Header, Body, Sections vs Tabs
- Linked Entity Views
 - Name Display
 - Config

Managing Relationships :

1—1 : (Dept → Stcls)

N—1 : (Stcls → Dept)

N—N : (Stcls → Courses)

Self Refrential: Entity linked to itself
(Emp → Manager)

CONFIGURING BUSINESS RULES:

Logic in form w/p code

eg: Visible / readonly.

Sys View
for everyone
User view!
for 1 user

Customizing Views:

screen shows to user where we see records list.

e.g: Student ko transcript pe data show hota hai

OOB Validation:

↳ built in checks

DDR: Duplicate Detection Rules

↳ same record again

na hne.

WORKFLOWS:

Real Time: Instant

Background: Scheduled ya delayed action

Business Process Flow: Step by step guide for users through a business process

e.g:

"Thanks contact us"

Lead → opportunity → Quote

Customizing Dashboards & Charts :

- Dashboards layouts
- Components
- Charts
- Grids
- Frames
- Web Resources

ایہی چیزیں customize کی جاسکتی ہیں

Securing Dynamics:

Privileges - Access levels

Entity / Record / Role / Form / Field Security

See only useful data. that is allowed.

Extension with JScript

XRM toolbox (for custom plugins)

Ribbon Workbench (Tool bar button customization)

Power Platform:

- Power Automate: (Automate repetitive workflow)
- Canvas App