

# 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 karne ke liye)

Marketing (For promotion)

Customer Service (support & complaints)

Field Service (site based services ke liye)

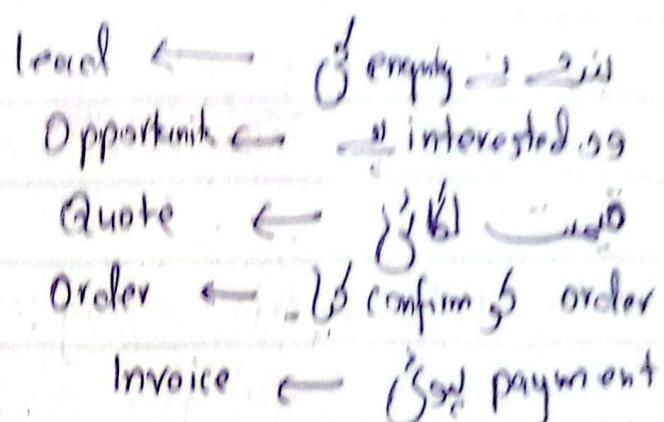
Project Service (project delivery & timelines ke liye)

## Sales Pipeline

### 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



### Opportunity & Product lifecycle:

- Create (product lineage)
- Revise (update KPI)
- Revert/Clone (copy bna)
- Retire (Product close)

### Goals & Analytics:

→ Goals set kiye jaate hain ta k performance track ho sakte

→ Analytical option do analysis of sales

## Microsoft Dynamics 365 Marketing:

### → Marketing At Glance:

- ) Real time Marketing: respond to customer in real time
- ) Outbound Marketing: ads & campaign
- ) Event Planning: Manage events, 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 logr ke base pe.

e.g:

Student create to auto ~~auto~~ add ho jai

## 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 jante hain

### Core Components:

- 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.

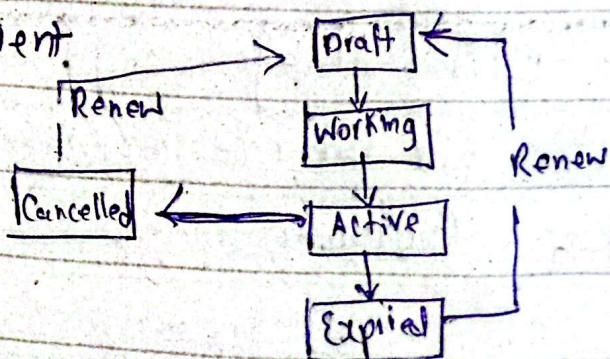
e.g: phone warranty claim kerte ho, to wo ek "case" hota hai CRM mai; SLA define karta hai & abn mai

## Case lifecycle:

- Case Creation
- Case Mngmt
- Case hierarchies (Parent Child)
  - Cascading:
    - None
    - Close all childs with parent
    - Parent can't close until child
- Case Merging

### - Queues

### - Entitlement



Knowledge Management (Articles)  
create → approve → publish → retire

### Routing & Queues

Cases automatically assigned based on skills, workload.

→ Unified Routing smartly distributes workload.

### Analytics Dashboard:

Dashboard se SLA ~~reached~~  
breach, resolve cases, our average response time dekh ja skta hai

### Field Service: service at customer location.

Obj:

- Technician travel time reduced
- Work Order Manage
- First time fix rate improved
- 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 sareh data hai.

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

Pipelines: Automate Solutions deployment → test → production environments.

## Building Model Driven App:

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

- built-in data & business logic
- App Designer have components (entities, dashboards, views) Select Krte hो.
- Sitemap: define Kaise kai navigation (left menu)

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

### Data Type:

→ Single Line of Text / Multiple Lines 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 → Stds)

N-1: (Stds → Dept)

N-N: (Stds → Courses)

Self Referential: Entity linked to itself

(Emp → Manager)

## CONFIGURING BUSINESS RULES:

Logic in form w/o code

e.g: 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 nota hai

## OOB Validation:

↳ built-in checks

DDR : Duplicate Detection Rules

↳ Same record again

na bne.

## 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
- Iframes
- Web Resources

لـ customize all pages all

## 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 workflows)
- Canvas App