

Dynamic 365 platform structure

Dynamic 365 is a solution of Microsoft's for customer relationship management and enterprise resource planning. this platform evolved behind the scene and allowed the separation of various functionality modules, for understanding this platform better we should know its evolution and how it became what we see it today

Platform evolution: -

In 2003, Microsoft first launched its services for CRM, which include basic sales and customer service module in this there is very less customization.

In 2005 the newly renamed Dynamics CRM 3.0 is introduced which offers marketing module and customer record types. This enables more customization to the platform

As moving further version of CRM was released, the need for one system on a single platform that could benefit almost all areas of a business arises and this need leads to 'xRM' or Anything Relationship management. However, all this was still built on the Sales, Service, and Marketing foundation of the original Dynamics CRM platform.

For providing support and creating a single platform, Microsoft launch d365 for CRM/ERP offering. It is essential for standardizing their business offering. so, dynamics 365 is essentially a grouping of CRM/ERP products

However, although there were integration options for those businesses using more than one of the products, there was no underlying shared data platform.

Away from the CRM/ERP platforms, Microsoft had been developing a cloud-based database platform to deliver the functionality of SQL but without the need for highly skilled development resources. This platform had a predefined schema that included entities such as Accounts, Contacts, and Activities and was referred to as the Common Data Model (CDM).

So main functionality which has evolved so far is modularity now an organization can choose whichever module they want

Modularity for everyone

Dynamics 365 offers various modules that can be purchased separately or packaged under the Customer Engagement Plan license. This plan includes the following functional modules:

Dynamics 365 for Sales

Dynamics 365 for Customer Service

Dynamics 365 for Project Service Automation

Dynamics 365 for Field Service

Dynamics 365 for Marketing

each one of the modules can function either independently or in conjunction with the others, sharing data and providing full visibility on customers across all modules.

As it evolves as d365, the platform has been revamped to support a modular approach, now individual applications can be purchased for each set of functionalities. You can now start with Sales as an example, then later on when you are ready to add new features, you can include Customer Service, and so on. This allows a slower roll-out based on the individual level of comfort or each client organization.

Dynamics 365 application elements

Modular design= modules are groups of functionalities that serve a specific business scope. The standard modules in the previous versions provided by Microsoft include Sales, Service, and Marketing. Since then, new modules have been added, as we've seen previously.

Entities=Entities are containers used to model, store, and manage business data. Through the use of entities, the platform allows us to structure data, create relationships, and manage actions. every entity has some attributes, for example, an account entity has a name attribute, id attribute, a description attribute, and many others.

Processes= Dynamics 365 allows businesses to define and enforce consistent business processes, helping users to focus more on performing their regular work and less on remembering what needs to be done at each step along the way

there are four categories of processes available—dialogs, workflows, actions, and business process flow

- Dialogs= Dialogs are used to create a graphical interface to guide a user through a process to be followed when interacting with a customer or performing a set of actions.
- Workflows= Workflows help to automate actions behind the scenes. They do not present a user interface and are not limited to being completed in a single session.
- Actions=An action in Dynamics 365 is a custom process that allows us to create a custom message. They are used to add new functionality to the application or to combine multiple requests into a single one.
- Business process flow= Business process flows are visual elements that allow a system user to input required data by grouping the required fields at the top of the screen

Dashboard= Dashboards in Dynamics 365 are visual components that allow users quick access to aggregated data in a system. They are a visualization and analytics tool that enhances the value of your system by allowing users to quickly glance at aggregated data and to dig deeper into underlying data used to generate the visualization.

Reports= A user can report on system data in various ways: from the simplistic Advanced Find tool, where tabular data can be retrieved and exported to Excel for further analytics, to wizard-driven report generation, and to custom SQL Server Reporting Services (SSRS) reports

The extensibility options

The extensibility model leverages the Common Data Model (CDM) along with the Common Data Service (CDS) for apps, which is also an integral part of the Power Platform. This allows power users, non-developers, and developers alike to build custom solutions to handle various other business scenarios or integrate with other third-party platforms

The system can be extended through various methods and components. Third-party solutions can be acquired from Dynamics Marketplace, and internal customizations can be performed, packaged, and exported from one environment to another

Understanding platform navigation

With the updates the navigation of d365 is improved now it is well structured, use less screen and have more dynamic qualities. With the introduction of the various hubs and the application model, benefiting the Unified Interface, the navigation is now fully configurable to reflect only the necessary elements for a specific application. This navigation has been extracted from the top-most location where we had it in the Classical UI and has been relocated to a side blade, which can be extended when needed

The application ribbons have also been redesigned both in the Classical UI as well as the Unified Interface, with a similar horizontal display at the top of the form. The most common actions are left visible, with additional ribbon elements collected under an ellipsis menu. In addition, tabs on forms have now been added underneath the record name for easy access and navigation

Exploring the modular concept

For delivering a new modular concept the platform has been redesigned around a new structural approach. At the core of the platform, we have Common Data Model. CDM is a metadata-driven layer that simplifies data integration and sharing across various apps by providing a set of common data entities. This shows consistency across the platform

CDM provides a set of standard core entities like Account, Contact, Activity, Owner, Currency, Task.

it simplifies integration efforts by collecting and surfacing data to all apps from a common dataset. Its strength is the ability to extend this model as needed, in order to build new applications and solutions for various specialized purposes.

This depicts the modular approach: the ability to source data from various sources, to merge it into a common data store in CDM, and to surface only subsets of functionality in individual applications targeted to specific roles.

Dynamics 365 sales application

The main motive of sales application is to manage sales operation of an organization and help a business to maintain new potential customers along with existing one

Reviewing the sales application

The main focus of sales application is building relationships with prospects and customers. the d365 for sales facilitates sales teams in managing leads and opportunities in a more orderly fashion, it helps in closing more opportunities. D365 provides a unified interface name “sales hub”. It is a core application that handles sales functionality.

Within the Sales module, the sales team can manage their customers and contacts and get full visibility on potential and existing customers, current orders and services, existing issues, and their resolutions

Benefits of sales module

- The sales team can manage customer and contact and get full visibility on potential and existing customer
- With all information at their fingertips, a salesperson can walk into any new opportunity, fully prepared while avoiding any surprises
- Businesses can show full knowledge of the customer and their current needs, level of satisfaction, and potential issues.

In d365 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. there are different sections in the sales module like customer, sales, collection, and marketing, etc. there are two types of entities one is shared entities and second is sales specified entities.

Sales-specific entities

As the name suggest these entities are used mainly within the sales module these are following: -

Leads= a lead is a potential customer who is interested in the organization's product/services.it is of three types new, Qualify, Disqualify.

Opportunity= The Opportunity entity is meant to capture a potential sale for an existing customer. it is generated directly by organization and by qualifying a lead

Competitors = The Competitor entity stores details about another organization offering similar Products and/or Services. This allows us to associate a competitor record throughout the sales cycle. One of many Competitor records that can be associated with every Opportunity.

Quotes= The Quote entity represents an offer of Products and/or Services at a predetermined price. In addition, payment terms are associated with the respective quote

Order= The Order entity is, in fact, a Quote that has been accepted by a customer. They can be created from a Quote, or directly as a new Order

Invoice= An Invoice represents the next step in the process. You can generate an Invoice from an existing Order by selecting the Create Invoice option on the ribbon. Once you've finished working on an invoice, typically, control is transferred to your ERP system for financial processing

Product= the Product is a record that represents an individual Product or Service offered to customers. Products can be associated with Opportunities, Quotes, Orders, and Service Cases. A Product can contain associated sales materials, as well as details about a competitor offering

Sales literature= In Dynamics 365 Sales, the Sales Literature is a collection of records of various product documentation that's stored in various file type formats. This is information that is referenced or attached from external sources. Each Sales Literature record can include one or more individual sales attachments. Each attachment has a defined set of keywords, an author, and a title. It also includes an abstract.

Standard Sales processes

The Business Process Flow (BPF) is a feature that was introduced back in Dynamics CRM 2013 and was greatly enhanced in later versions. It allows the system user to follow a predefined business process path to completion, and to track progress visually. On an entity form, these are presented through a visual representation at the top of the form.

Lead to opportunity sales process

1. We start at the Lead record by creating a new Lead. We work with the Lead and when we are ready, we qualify it and convert it into an Opportunity.
2. The Develop stage in the process is already using the Opportunity record, as generated from the original Lead. Additional information is collected and recorded on the Opportunity.
3. The Proposed stage further expands the work on the Opportunity by tracking the creation and presentation of a proposal to a customer. Like proposal of quote.
4. Finally, the Close stage handles the final Proposal presentation to a customer, capturing the win and final communication to the client, as part of the sales process. At this point, we are ready to hand the sale to a fulfillment. Like getting orders and sending invoices

Reviewing Sales dashboards

Microsoft provides a set of default dashboards specific to Sales staff. They are as follows:

Sales Activity Dashboard= The Sales Activity Dashboard consolidates the day-to-day data required by a sales representative to complete their tasks. It includes charts that represent the sales pipeline, a view into open and won opportunities, a listing of Open Leads and Open Opportunities, as well as the personal activities for the currently logged-in user. This dashboard is also a good starting point for a sales representative logging into the system. Besides having visibility into a graphical representation of various Key Performance Indicators (KPIs), the bottom of the dashboard also presents a list of activities that require the user's attention

Sales Activity Social Dashboard= The Sales Activity Social Dashboard takes most of its data representations from the regular Sales Activity Dashboard, but it adds the Assistant section. This is a piece of AI that was added to enhance functionality across Sales

Sales Dashboard= It digs right into the data and presents lists of All Activities, Open Opportunities, Open Leads, and Active Accounts. We also get to look at the sales pipeline, as well as a graphical representation of All Opportunities. the organization can provide a set of custom dashboards as needed. When creating custom dashboards, you can share them with your team for better visibility

Leveraging Sales reports

The Dynamics 365 platform allows us to report on data in various ways. Starting from aggregated and filtered data presented in views, and continuing with charts, dashboards, and wizard-driven reports, the platform capabilities are quite extensive. Add to that the ability to export to Excel and perform further analysis or use Dynamics 365 Sales data as a data source for Power BI, and suddenly you can start creating some very complex visualizations

Marketing features

Dynamics 365 sales module also provide some marketing feature which is separate from marketing module this allows user to create some marketing processes like creating own marketing list and generating the quick campaign. so basically, this can allow the salesperson to send mass email to a specific targeted group of customers

Summary

So, Microsoft's offering for CRM/ERP has evolved in the past few years it starts with sales module only but due to the need of industry, it has become what it is today. Microsoft provides a unified interface for CRM/ERP solutions under the name of dynamics 365. It offers sales, customer service, marketing, PSA, field service, etc. An organization can choose any of these modules according to their need.

If we talk about sales module, it helps user to manage its prospects and existing customer, make a predefined process predefined according to the user for qualify leads to a loyal customer