

October **techshop**

DYNAMICS 365

FOR SALES AND MARKETING

myrtec




what is a CRM?

customer relationship manager


- includes leads, prospects and customer data
- tracks tasks and activities against accounts
- create quotes and orders, and send invoices
- forecast sales and manage pipeline
- manage ongoing customer relationships
- manage products and pricing
- ability to automate tasks

A large, light green sunburst graphic with many thin rays radiating from a central point, serving as a background for the main title.

CRM best practices

**how to choose the right CRM for your
business**

1. define goals
2. do your research
3. design implementation plan
4. customise CRM
5. build automation
6. provide comprehensive training
7. leverage reports and analytics
8. audit and update regularly



keeping your data within the 365 stack

- save money
- better integration
- smarter automation
- reduce the risk of a breach
- less duplication of data

introduction to dynamics 365



Up to 55 percent¹

Increase in finance personnel productivity using Dynamics 365 Finance

[Read the study >](#)



215 percent ROI²

Over three years using Dynamics 365 Sales

[Read the study >](#)



73 percent reduction³

In average agent handling time using Dynamics 365 Customer Service

[Read the study >](#)



\$1.5M savings⁴

By reducing unplanned machine downtime using Dynamics 365 Supply Chain Management

[Read the study >](#)



\$44K savings⁵

In third party reporting spend using Dynamics 365 Business Central

[Read the study >](#)



demo

Dynamics 365 | Sales Hub Try the new look

Save Save & Close + New Deactivate Delete Refresh Check Access Copy as Campaign Copy as Template Process Assign Flow Share

CD **Cookie Deliveries** - Saved
Campaign

No Template | \$0.00 Estimated Revenue | Proposed Status Details | **Skye Harvey** Owner

Summary Details Related

CAMPAIGN

Name	* Cookie Deliveries
Campaign Code	CMP-01000-X2N2J
Currency	* Australian Dollar
Campaign Type	Advertisement
Expected Response(%)	---

Timeline

Search timeline

Enter a note...

Get started

Capture and manage all records in your timeline.

MARKETING LISTS

Name ↑	Members Count ↓
No data available	

0 - 0 of 0 Page 1

LEADS

Name ↑	Owner ↓	Status ↓
No data available		

0 - 0 of 0 Page 1

SCHEDULES

Proposed Start	---	📅
Proposed End	---	📅
Actual Start	10/4/2023	📅
Actual End	11/1/2023	📅

OFFER

Delivering cookies to our target list here in Newcastle

Dynamics 365 Sales Hub

Cookie Deliveries - Saved Campaign

Summary Details Related

CAMPAIGN

Name	* Cookie Deliveries
Campaign Code	CMP-01000-X2N2J
Currency	* Australian Dollar
Campaign Type	Advertisement
Expected Response(%)	---

SCHEDULES

Proposed Start	---
Proposed End	---
Actual Start	10/4/2023
Actual End	11/1/2023

OFFER

Delivering cookies to our target list here in Newcastle

Timeline

Search timeline

Enter a note...

Get started

Capture and manage all records in your timeline.

Quick Create: Lead

Details

Scan Business Card

Topic * Learn more about FLEX

Budget Amount ---

Purchase Timeframe ---

Lead Source Advertisement

Personal Information

First Name + Suzie

Last Name * Do

Job Title General Manager

Company Name + Latest Legal

Contact Details

Email suzie@latestlegal.com.au

Mobile Phone ---

Description ---

Save and Close Cancel

Dynamics 365 | Sales Hub Try the new look

Save Save & Close + New Deactivate Delete Refresh Check Access Copy as Campaign Copy as Template Process Assign Flow Share

Cookie Deliveries - Saved Campaign No Template | \$0.00 Estimated Revenue | Proposed Status Details | **Skye Harvey** Owner

Summary Details Related

CAMPAIGN

Name * **Cookie Deliveries**

Campaign Code **CMP-01000-X2N2J**

Currency * **Australian Dollar**

Campaign Type **Advertisement**

Expected Response(%) ---

Timeline

Search timeline

Enter a note...

Get started

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MARKETING LISTS

Name ↑	Members Count ↓
No data available	

0 - 0 of 0 Page 1

SCHEDULES

Proposed Start	---	📅
Proposed End	---	📅
Actual Start	10/4/2023	📅
Actual End	11/1/2023	📅

LEADS

Name ↑	Owner ↓	Status ↓
Suzie Do	Rob Dawso...	Open

1 - 1 of 1 Page 1

OFFER

CAMPAIGN ACTIVITIES

Sales dashboard - Dynamics 365

https://orgaf87756a.crm6.dynamics.com/main.aspx?appid=d07aecb6-f46a-ee11-9ae7-00224893bdfa&pagetype=dashboard&id=eaa6e6bb-4712-ec11-b6e7-00224820f09b&type=system&_canOverride=true

Dynamics 365 | Sales trial

Welcome to Dynamics 365 Sales! You have 30 days left in your free trial. [Compare plans](#)

My work

- Dashboard
- Sales accelerator
- Activities
 - Calendar
 - Tasks
 - Calls
- Pipeline
 - Leads
 - Opportunities
 - Forecasts
- Customers
 - Contacts
 - Accounts
- Learn
 - Resources

Sales

Save As | New | Set As Default | Refresh All | Share

Sales dashboard

Work items

Show all

- KB** Kenya Brady (90) Store Manager • Consolidated Messenger
- IC** Ivan Cashin (88) Purchasing Specialist • Northwind Traders
- RK** Reuben Kidd (75) Cafeteria Manager • Proseware Inc.
- WA** Winford Asher (90) Cafeteria Manager • Fabrikam, Inc.
- HG** Halle Griffiths (58)

10 items | Last updated at 4:07 AM

Open Leads

Leads by Source

Advertisement | Employee Referral | External R

Recent calls

Show all

Call To	Subject	Actual Start
Jeremy Johnson	Follow-up call	10/28/2023
Josiah Love	Follow-up call	10/28/2023
Gabriela Christiansen	Follow-up call	10/28/2023
Lavona Field	Follow-up call	10/28/2023
Miguel Garcia	Discuss Cold Coffee Machines	10/28/2023
Zoltán Szabó	Discuss Duo Espresso Machines	10/28/2023

1 - 6 of 21 | Page 1

Pipeline by stage

Show all

Opportunities at risk

Focused view

Topic	Est. revenue	Score (Predictive Score)
2 Café Corto for Northwind Traders	\$33,800.00	55
2 Café Duo Espresso Machines for Fabrika	\$25,800.00	42
1 Café Grande Espresso Machine for Alpir	\$14,900.00	58
10 Airpot XL Coffee Makers for Alpine Ski	\$4,990.00	59

[Take a tour](#)

Leads My Open Leads - Dynamic x

https://orgaf87756a.crm6.dynamics.com/main.aspx?appid=d07aecb6-f46a-ee11-9ae7-00224893bdfa&pagetype=entitylist&etn=lead&viewid=00000000-0000-0000-00aa-000010001005&viewType=1039

Dynamics 365 Sales trial

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← Show Chart Focused view + New Delete Visualize this view Export to Excel Import from Excel Open Dashboards Share

My Open Leads* Edit columns Edit filters Filter by keyword

Name	Topic	Status Reason	Created On
<input type="checkbox"/> Suzie Do	Learn more about FLEX	New	10/18/2023 1:49 AM
<input type="checkbox"/> Kenya Brady	20 Airpot XL Coffee Makers for Consolidated Messenger	New	10/15/2023 12:56 AM
<input type="checkbox"/> Gerald Stephens	10 Airpot Lite Coffee Makers Long-term Lease for Alpine S...	New	10/15/2023 12:56 AM
<input type="checkbox"/> Ivan Cashin	15 Airpot XL Coffee Makers Long-term Lease for Northwin...	New	10/15/2023 12:56 AM
<input type="checkbox"/> Halle Griffiths	20 Airpot XL Coffee Makers Long-term Lease for Northwin...	New	10/15/2023 12:56 AM
<input type="checkbox"/> Harriet Parrish	15 Airpot Duo Coffee Makers Short-term Rental for Lucern...	New	10/15/2023 12:56 AM
<input type="checkbox"/> Rachel Michael	20 Airpot XL Coffee Makers for Alpine Ski House	New	10/15/2023 12:56 AM
<input type="checkbox"/> Alex Baker	5 Café A-100 Automatic	New	10/15/2023 12:56 AM
<input type="checkbox"/> Lavona Field	15 Airpot Duo Coffee Makers for Fabrikam	New	10/15/2023 12:56 AM
<input type="checkbox"/> Lilly Pyles	3 Café Duo Espresso Machine Long-term Lease for A. Datum	New	10/15/2023 12:56 AM
<input type="checkbox"/> Reuben Kidd	10 Airpot Duo Coffee Makers for Proseware	New	10/15/2023 12:56 AM
<input type="checkbox"/> Jabez Parker	5 Café Lite Espresso Machines for Proseware	New	10/15/2023 12:56 AM
<input type="checkbox"/> Winford Asher	10 Airpot Coffee Makers for Fabrikam	New	10/15/2023 12:56 AM
<input type="checkbox"/> Josiah Love	10 Airpot Duo Coffee Makers for Alpine Ski House	New	10/15/2023 12:56 AM
<input type="checkbox"/> Harrison Curtis	5 Café Duo Espresso Machines for Fabrikam	New	10/15/2023 12:56 AM

Rows: 17

[Take a tour](#)

Lead: Sales Insights: Kenya Brady

https://orgaf87756a.crm6.dynamics.com/main.aspx?appid=d07aecb6-f46a-ee11-9ae7-00224893bdfa&pagetype=entityrecord&etn=lead&id=7da38ae0-4d0e-ea11-a813-000d3a1bbd52

Dynamics 365 Sales trial

Welcome to Dynamics 365 Sales! You have 30 days left in your free trial. [Compare plans](#)

My work: Dashboard, Sales accelerator

Activities: Calendar, Tasks, Calls

Pipeline: Leads, Opportunities, Forecasts

Customers: Contacts, Accounts

Learn: Resources

Kenya Brady - Saved
Lead · Sales Insights

Seminar Lead Source | Warm Rating | New Status | Rob Dawson Owner

Lead to Opportunity Sal... Active for 3 days | Qualify (3 D) | Develop | Propose | Close

Summary | Relationship Analytics | Details | Related

CONTACT

Topic * 20 Airpot XL Coffee Makers for Consolidated Me...

First Name Kenya

Last Name * Brady

Job Title Store Manager

Business Phone 222-555-0172

Mobile Phone 222-555-0173

Email kenya@consolidatedmessenger.com

COMPANY

Company Consolidated Messenger

Website http://www.consolidatedmessenger.com/

Street 1 4567 Balboa Court

Up next

Sequence: New lead nurturing

Introduction mail
Step 1 • Due by 10/15/2023 12:57 AM
Thank for the interest and take the opportunity to share details about the company, the product/services and the team

Email | Mark complete | Wait 5 days

Reminder email
Step 2
Reminder email

Call customer

Previous steps

Who Knows Whom

No connections found
Who knows whom is disabled [Learn More](#)

Lead score

90 Grade A → Steady

- Purchase timeframe is next quarter
- Purchase process is individual
- Lead is relatively new
- Estimated budget is \$50,000.00

Details

This lead was scored on 10/15/2023 12:57 AM.

Timeline

Search timeline

Assistant [Take a tour](#)

Opportunities My Open Opportu x

https://orgaf87756a.crm6.dynamics.com/main.aspx?appid=d07aecb6-f46a-ee11-9ae7-00224893bdfa&pagetype=entitylist&etn=opportunity&viewid=00000000-0000-0000-00aa-000010003000&viewType=1039

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My work: Dashboard, Sales accelerator

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Customers: Contacts, Accounts

Learn: Resources

My Open Opportunities

Pipeline value \$235,668.00 Number of deals in pipeline 8 Won amount N/A Number of won deals 0 Lost amount N/A Number of lost deals 0

Deal tracker Sales funnel

Today, 10/18/23

Est close date

Grade A Grade B Grade C

Topic	Potential C...	Est. close date	Est. revenue	Contact	Account	Probability	Rating	Email (Potential Custo...
<input type="checkbox"/> 20 Airpot XL Coffee Makers for Consolidated Messenger	Consolidated ...			Kenya Brady	Consolidated ...		Warm	
<input type="checkbox"/> 5 Café BG-1 Pro Grinders for Northwind Traders	Northwind Tra...	10/20/2023	\$24,995.00	Heriberto Nat...	Northwind Tra...	93	Cold	
<input type="checkbox"/> 3 Café Grande Espresso Machines for A. Datum	A. Datum Cor...	10/29/2023	\$44,700.00	Kevin Martin	A. Datum Cor...	90	Warm	
<input type="checkbox"/> 2 Semiautomatic Espresso Machines for A. Datum	A. Datum Cor...	10/30/2023	\$39,800.00	Kevin Martin	A. Datum Cor...	78	Warm	
<input type="checkbox"/> 18 Airpot Coffee Makers for Northwind Traders	Northwind Tra...	11/10/2023	\$30,582.00	Miguel Garcia	Northwind Tra...	93	Cold	

Rows: 8

Take a tour

Opportunity: Sales Insights: 3 Café Grande Espresso Machines for A. Datum

https://orgaf87756a.crm6.dynamics.com/main.aspx?appid=d07aecb6-f46a-ee11-9ae7-00224893bdfa&pagetype=entityrecord&etn=opportunity&id=71ecca72-0d1c-48ce-a21b-0d6650b1e904

Dynamics 365 Sales trial

Welcome to Dynamics 365 Sales! You have 30 days left in your free trial. [Compare plans](#)

3 Café Grande Espresso Machines for A. Datum - Saved
Opportunity · Sales Insights

A. Datum Corporation Account | 10/29/2023 Est. close date | \$44,700.00 Est. revenue | Rob Dawson Owner

Sales Process: Active for 3 days

Qualify (3 D) | Develop | Propose | Close

Summary | Relationship analytics | Quotes | Products | Related

Key details

- Topic: 3 Café Grande Espresso Machines for A. Datum
- Contact: Kevin Martin
- Purchase timeframe: This Quarter
- Currency: Australian Dollar
- Budget amount: \$45,000.00
- Purchase process: Committee
- Description: Espresso machines to their renovated cafeteria

Timeline

Recent

- Modified on: 10/17/2023 11:04 PM
Subject Discuss on Grande Espresso Machines Active
Due: 10/28/2023 9:30 AM
Modified By: Tristan Hough
- Modified on: 10/17/2023 11:04 PM
Meeting from: Jeremy Johnson Active
Sync with customer
- Modified on: 10/17/2023 11:04 PM
Meeting from: Jeremy Johnson Closed
Discuss service warranty

Opportunity score

86 Grade A → Steady

- Purchase timeframe is this quarter
- Decision maker identified
- Estimated budget is \$45,000.00
- Purchase process is committee

This opportunity was scored on 10/15/2023 12:58 AM.

Assistant

Notifications

- 1 reminder
- Opportunity closing soon: 3 Café Grande Espresso Machines for A. Datum

[Take a tour](#)

Account: Account: A. Datum Corp | x

https://orgaf87756a.crm6.dynamics.com/main.aspx?appid=b589c01a-3b6a-ee11-9ae7-00224891d7fd&pagetype=entityrecord&etn=account&id=83883308-7ad5-ea11-a813-000d3a33f3b4

Dynamics 365 | Sales Hub

Try the new look

Save Save & Close + New Open org chart Deactivate Connect Add to Marketing List Assign Email a Link Delete Refresh Share

A. Datum Corporation - Saved
Account · Account

\$35,000,000.00 Annual Revenue | 2,000 Number of Employees | Rob Dawson Owner

Summary Details Files Assets and Locations Related

ACCOUNT INFORMATION

Account Name * **A. Datum Corporation**

Phone **425-555-0158**

Fax **425-555-0159**

Website **http://www.adataum.com/**

Parent Account ---

Ticker Symbol ---

ADDRESS

Address 1: Street 1 **2345 Birchwood Dr**

Address 1: Street 2 ---

Address 1: Street 3 ---

Address 1: City **Redmond**

Address 1: State/Province **Washington**

Address 1: ZIP/Postal Code **98101**

Timeline

Search timeline

Enter a note...

Recent

- Modified on: 4:50 AM
Opportunity Close from: Rob Dawson
\$44,700.00
Closed Opportunity: 3 Café Grande Espresso Machines for A. Datum
View more
Opportunity: 3 Café Grande Espresso Machines for A. Datum
- Modified on: 4:50 AM
Quote Close Quote closed by: Rob Dawson
Quote Won (Won) - QUO-01001-P0B7X0
View more
Opportunity: 3 Café Grande Espresso Machines for A. Datum
- Modified on: 10/17/2023 11:04 PM
Phone Call from: Jeremy Johnson Active
Discuss on Grande Espresso Machines
View more
Opportunity: 3 Café Grande Espresso Machines for A. Datum
- Modified on: 10/17/2023 11:04 PM
Phone Call from: Jeremy Johnson Active
Discuss on Semiautomatic Espresso Machines
Provide Noah more information on our semiautomatic espresso machines

Assistant

Notifications

1 reminder

Opportunity closing soon
2 Semiautomatic Espresso Machines for A. Datum

Primary Contact

Kevin Martin

Email
kevin@adataum.com

Business
425-555-0160

CONTACTS

Kevin Martin
kevin@adataum.com

1 - 1 of 1 Page 1

Quote: Quote: 3 Café Grande Esp... x

https://orgaf87756a.crm6.dynamics.com/main.aspx?appid=d07aecb6-f46a-ee11-9ae7-00224893bdfa&pagetype=entityrecord&etn=quote&id=795e67b3-716d-ee11-9ae7-002248964de4&cmdbar=true

Dynamics 365 | Sales trial

Welcome to Dynamics 365 Sales! You have 30 days left in your free trial. [Compare plans](#)

Save Save & Close + New Delete Refresh Export to PDF Check Access Look Up Address Activate Quote Get Products Process Assign Share

3 Café Grande Espresso Machines for A. Datum - Saved

Quote \$44,700.00
Total amount ---
Effective from ---
Effective to In Progress
Status

Summary Details Related

Quote ID *

Revision ID *

Owner *

Name *

Currency *

Price List

PRODUCTS

Group By: (no grouping)

Product Name	Propert...	Unit	Price Per ...	Quantity	Discount	Extended Am...
> Café Gra...	No...	Primary ...	\$14,900.00	3.00000	---	\$44,700.00

SALES INFORMATION

Opportunity

Potential Customer *

SHIPPING INFORMATION

Shipping Method

Payment Terms

Detail Amount	\$44,700.00
(-) Discount (%)	---
(-) Discount	---
Pre-Freight Amount	\$44,700.00
(+) Freight Amount	---
(+) Total Tax	\$0.00
Total amount	\$44,700.00

DESCRIPTION

Order: Ord... 3 Café Grande Espri x

https://orgaf87756a.crm6.dynamics.com/main.aspx?appid=d07aecb6-f46a-ee11-9ae7-00224893bdfa&pagetype=entityrecord&etn=salesorder&id=97745fe5-716d-ee11-9ae7-002248964de4&cmdbar=true

Dynamics 365 Sales trial

Welcome to Dynamics 365 Sales! You have 30 days left in your free trial. [Compare plans](#)

3 Café Grande Espresso Machines for A. Datum - Saved \$44,700.00 Total Amount Active Status New Status Reason Rob Dawson Owner

Summary Details Related

Order ID * ORD-01000-K2K1W4

Name * 3 Café Grande Espresso Machines for A. Da...

Currency * Australian Dollar

Price List Contoso Coffee Price List

Prices Locked * Yes

SHIPPING DATES

Requested Delivery ---

Date Fulfilled

PRODUCTS

Group By: (no grouping)

Product Name	Property	Unit	Price Per	Quantity	Discount	Extended Am
Café Gra...	No...	Primary ...	\$14,900.00	3.00000	---	\$44,700.00

Page 1

SALES INFORMATION

Opportunity 3 Café Grande Espre...

Quote 3 Café Grande Espre...

Potential Customer * A. Datum Corporation

DESCRIPTION

Detail Amount \$44,700.00

(-) Discount (%) ---

(-) Discount ---

Pre-Freight Amount \$44,700.00

(+) Freight Amount ---

(+) Total Tax \$0.00

Total Amount \$44,700.00

SHIPPING INFORMATION

Take a tour

Sales Dashboard - Dynamics 365

https://orgaf87756a.crm6.dynamics.com/main.aspx?appid=b389c01a-3b6a-ee11-9ae7-00224891d7fd&pagetype=dashboard&id=d1f511a8-1ead-e211-bb72-00155da9a201&type=system

Dynamics 365 Sales Hub

Try the new look

Save As New Set As Default Refresh All

Sales Dashboard

My Activities

Filter by keyword

Activity Type	Subject	Regarding	Pri
Email	Thank you for your interest (Web site)	Alex Baker	Nc
Email	Thank you for your interest (Web site)	Lilly Pyles	Nc
Email	Thank you for your interest (Web site)	Rachel Michael	Nc
Email	Thank you for your interest (Web site)	Gerald Stepher	Nc
Email	Thank you for your interest (Web site)	Halle Griffiths..	Nc
Email	Thank you for your interest (Web site)	Harriet Parrish.	Nc
Email	Thank you for your interest (Web site)	Ivan Cashin	Nc
Email	Thank you for your interest (Web site)	Reuben Kidd	Nc
Email	Thank you for your interest (Web site)	Winford Asher.	Nc

ABC 1 - 9 of 30 Page 1

My Open Opportunities

Filter by keyword

Topic	Potential C...	Est. close d...
20 Airpot XL Coffee Makers for Consolidated M	Consolidated M	---
5 Café BG-1 Pro Grinders for Northwind Traders	Northwind Trac	10/20/2023
2 Semiautomatic Espresso Machines for A. Datum	A. Datum Corp	10/30/2023
18 Airpot Coffee Makers for Northwind Traders	Northwind Trac	11/10/2023
2 Café Duo Espresso Machines for Fabrikam	Fabrikam, Inc..	11/11/2023
9 Café PG-1 Grinders for A. Datum	A. Datum Corp	11/19/2023
2 Café Corto for Northwind Traders	Northwind Trac	12/4/2023

ABC 1 - 7 of 7

My Open Leads

Filter by keyword

Name	Topic	Sta
Suzie Do	Learn more about FLEX	Nc
Gerald Stephens	10 Airpot Lite Coffee Mak...	Nc
Ivan Cashin	15 Airpot XL Coffee Make...	Nc
Halle Griffiths	20 Airpot XL Coffee Make...	Nc
Harriet Parrish	15 Airpot Duo Coffee Ma...	Nc
Rachel Michael	20 Airpot XL Coffee Make...	Nc
Alex Baker	5 Café A-100 Automatic	Nc
Lavona Field	15 Airpot Duo Coffee Ma...	Nc
Lilly Pyles	3 Café Duo Espresso Mac...	Nc

ABC 1 - 9 of 16 Page 1

My Active Accounts

Filter by keyword

Account Name	Main Phone	Address 1: ...	Pri
A. Datum Corporation	425-555-0158.	Redmond	Ke
Consolidated Messenger	222-555-0172.	Santa Cruz	Ke
Fabrikam, Inc.	423-555-0103.	Lynnwood	Ha
Northwind Traders	614-555-0121.	Columbus	He

My Open Opportunities

Sales Pipeline

- 1-Qualify
- 2-Develop
- 3-Propose
- 4-Close

\$84,595.00

My Closed Opportunities in Current Fiscal Year

Top Customers

Potential Customer

Fabrikam, Inc.

Outlook interface showing an email from Melanie Bird to Rob Dawson. The email subject is "RE: Additional Wifi Hub and Presentation Hard...". The email content includes a "Tracked To Dynamics 365" notification, a reply "Awesome, thank you. I will see you tomorrow 😊", and a signature for Melanie Bird, General Manager at Lake Group Strata. The signature includes the Lake Group Strata logo and a banner for "EMPLOYER OF CHOICE WINNER". A disclaimer note is present at the bottom of the email.

The Dynamics 365 sidebar shows a case titled "Additional Wifi Hub and Pr..." with the following details:

- Case Title*: Additional Wifi Hub and Presentation Hardware
- Case Number: CAS-17604-M6T6
- Customer*: Lake Group Strata

The right sidebar shows a task list with items like "Follow up call marketing event" and "Follow up call to weekly target list".



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w. myrtec.com.au
p. 02 9146 6330
e. hi@myrt.ec




other useful features

- data export and visualisation
- territory management
- products and price lists
- sales literature and document management (SharePoint)
- native power automate integration for automations
- goals and forecasting



top 5 benefits

- microsoft stack rationalisation
- customisable to capture the data you need
- integrates with your other apps and software such as mail, linkedin, payments
- AI capability
- customer service / ongoing relationship management

A large, light green sunburst graphic with many thin rays radiating from a central point, serving as a background for the main text.

customisation integration & automation

- capture different types of data
- change the look and feel of the system
- sync data to different external systems
- automate business processes

To explain these, we are going to look at the example of Contoso Coffee, a company that produces coffee machines.

Middle name, title and main phone removed.

Coffee type and roast type added.

RM Rachel Michael - Saved
Lead · Sales Insights

Lead to Opportunity Sal...
Active for 3 days

Qualify (3 D) Develop Propose

Summary Relationship Analytics Details Related

CONTACT

Topic	* 20 Airpot XL Coffee Makers for Alpine Ski House
First Name	+ Rachel
Last Name	* Michael
Type of Coffee	Flat White
Type of Roast	Dark
Mobile Phone	281-555-0165
Email	rachel@alpineskihouse.com

COMPANY

Company	+ Alpine Ski House
Website	http://www.alpineskihouse.com/
Street 1	3456 B Southampton Rd

Timeline

Search timeline

Enter a note...

Recent

- Modified on: 10/17/2023 11:02 PM
Subject Call with Rachel **Closed**
Due: 10/8/2023 3:42 AM
Call with Rachel to share details on the XL coffee machines
Modified By: Rob Dawson
View more
- Modified on: 10/17/2023 11:02 PM
Subject Thank you for your interest (Web site) **Overdue**
Due Date: 10/15/2023 12:57 AM
Dear Michael, Thank you for visiting our Web site. We have forwarded your request for additio...
Modified By: Rob Dawson
View more

We are also not limited by the default type of records. Contoso now wants to offer grants for research into caffeine.

Table columns

Search

+ New table column

Show only unused table columns

- Created By
- Created By (Delegate)
- Currency
- 0.0 Exchange Rate
- Modified By
- Modified By (Delegate)
- Modified On
- Owning Business Unit
- Requested Amount (Base)
- Status
- Status Reason

New Grant

Grant

General Related

Name	*	---
Owner	*	Tristan Hough
Requestor		---
Status		---
Contact		---
Requested Amount		---
Score		---
Description		---

Save Save & Close New Deactivate Delete Refresh

Effects of caffeine of performance athletes - Saved

Grant

General Related

Name	*	Effects of caffeine of performance athletes
Owner	*	Tristan Hough (Available)
Requestor		Alpine Ski House
Contact		Cacilia Viera
Requested Amount		\$25,000.00
Score		75.00
Description		Study the effects caffeine has on winter sport athletes.

Created On 10/18/2023

My work

- Dashboard
- Sales accelerator

Activities

- Calendar
- Tasks
- Calls

Pipeline

- Leads
- Opportunities
- Forecasts

Customers

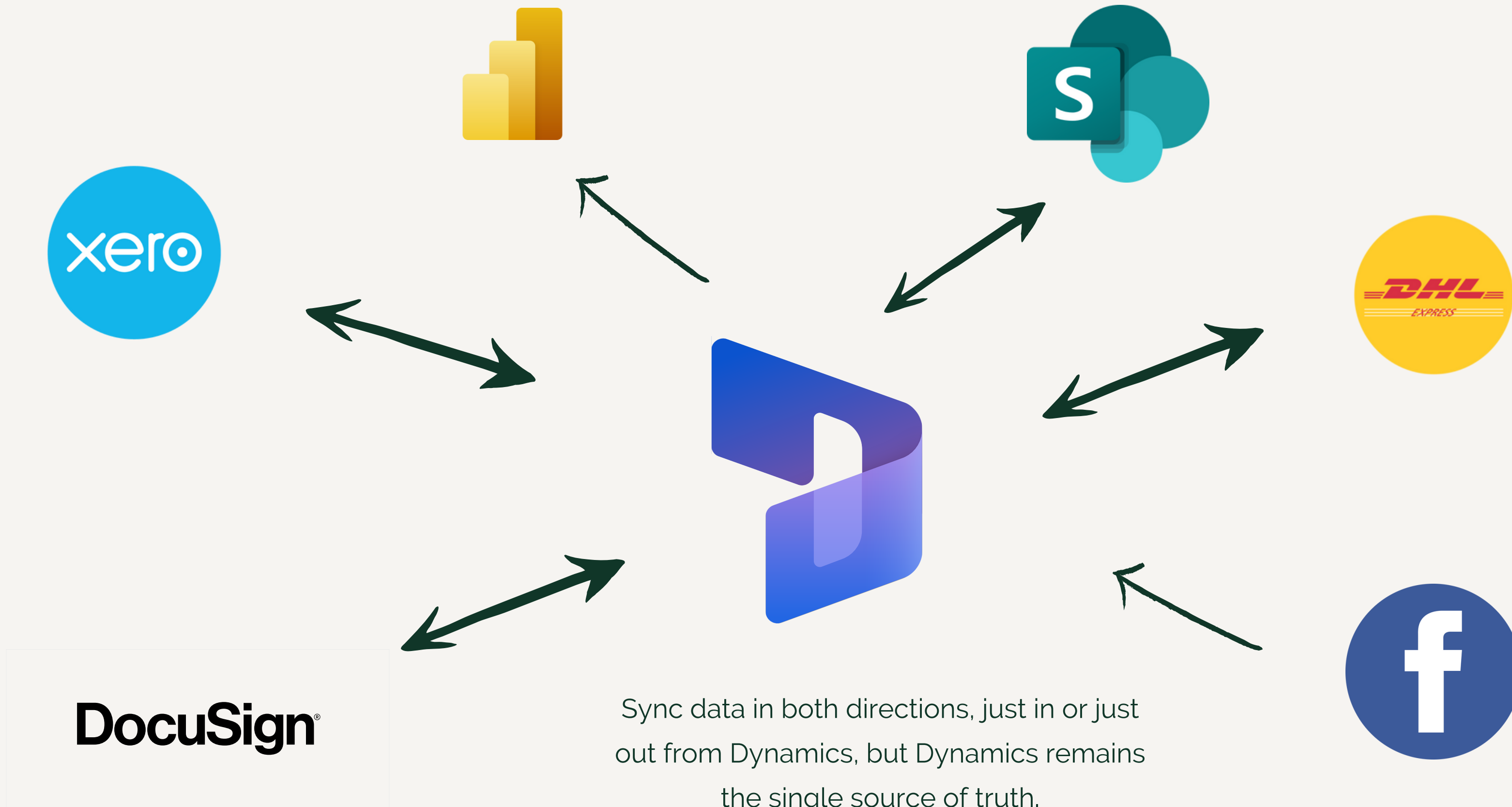
- Contacts
- Accounts
- Grants**


Learn


- Resources





a. Suite 3 Level 1 97 Hannell St Wickham 2293
w. myrtec.com.au
p. 02 9146 6330
e. hi@myrt.ec





 Sequence start
Sequence starts here


 Send an email
Introduction mail


 Set wait time
Wait for 5 days


 Send an email
Reminder email


 Set wait time
Wait for 5 days

 Make a phone call
Call customer

 Set wait time
Wait for 5 days

 Send an email
Thank you email

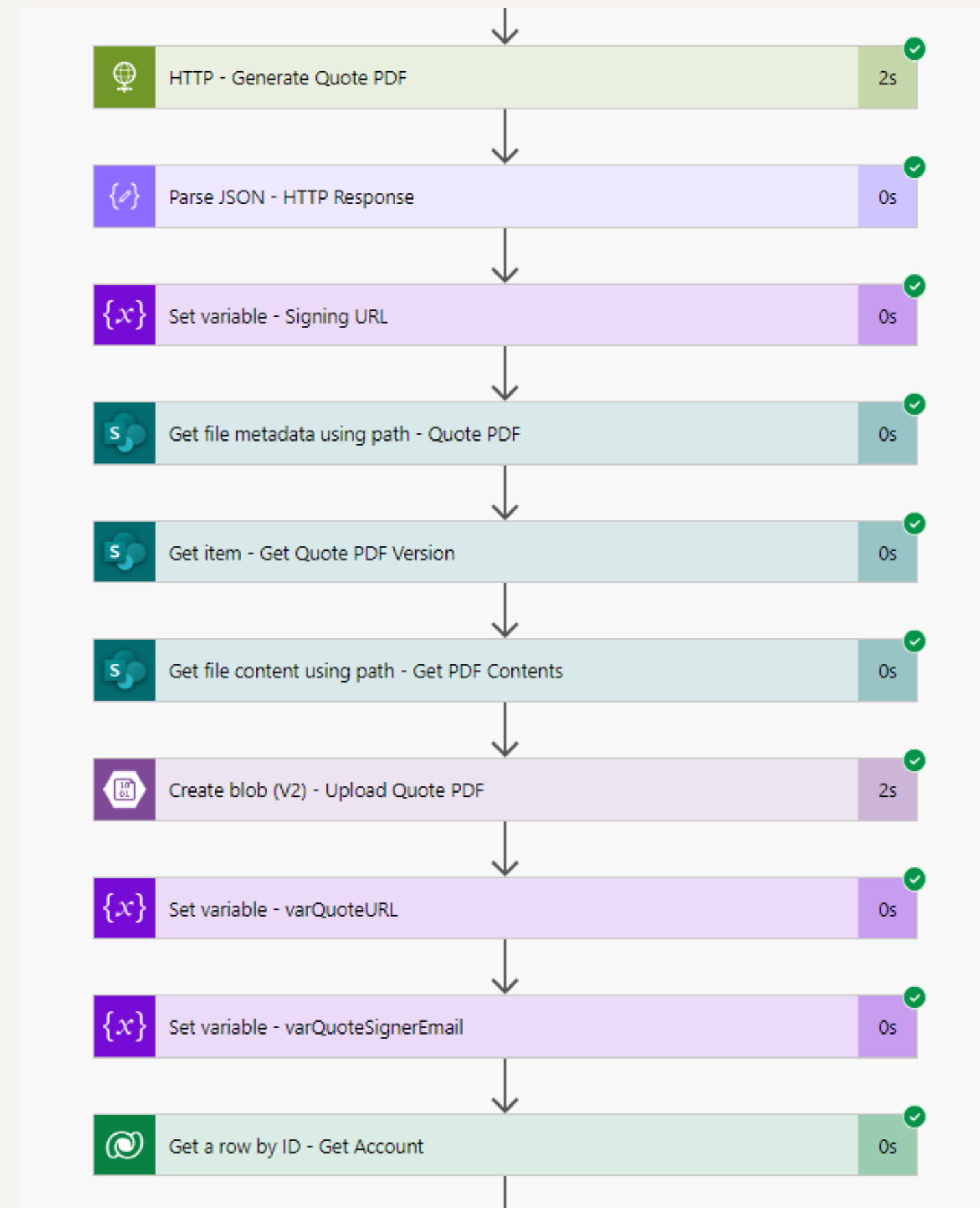
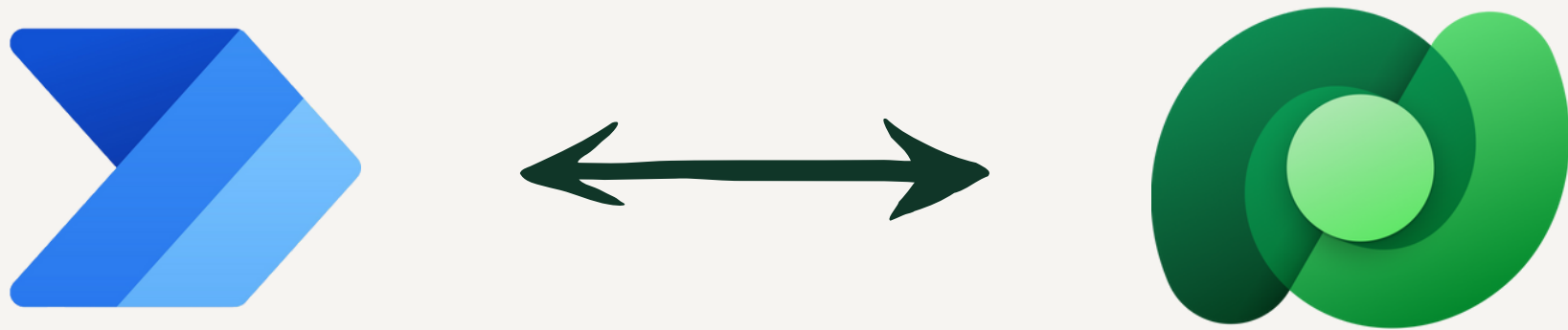
 Set wait time
Wait for 5 days

 Complete a task
Schedule a meeting

Contoso are expanding and hiring additional sales staff. They have optimised their lead conversion processes with sequences that guide new sales members through the activities.

New leads are automatically assigned by territory, seller attributes and availability.

For commercial buyers, when a quote is ready to send, automatically upload the quote to an e-signing platform and draft a templated email based on the products in the quote, attach any data sheets and the specific finance and safety requirements based on the customers state.





q&a

thank you for *coming along*.

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