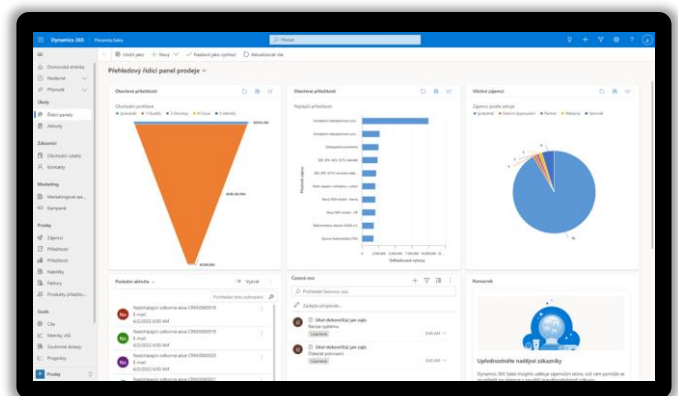




Take your sales management to a professional level. Get your sales team a **complex CRM system** that ensures efficient information record-keeping, provides a transparent database of contacts, sets the stage for the launch of marketing campaigns, and becomes a reliable guide on the customer journey **from initial interest to implementation.**

- Manage prospects, customers, contacts, and business opportunities
- Product catalogs
- Discount mechanisms
- Records of calls, events, tasks, and other activities
- Sales analysis
- Connection to Microsoft SharePoint for DMS
- Marketing campaigns
- Bulk emailing
- AI-based suggestions for more effective sales
- Dashboards
- Reports
- Reporty

- Kompletní pokrytí obchodního procesu, od prvotního kontaktu až po realizaci
- Efficient sales
- Access via the web interface or a mobile app
- Integration with Office, Teams, Power BI
- Native connection to Microsoft Dynamics 365 Marketing
- Consistent overview of customer data and contact history
- Business analytics
- Guide for unified record keeping
- Multi-factor identity verification
- Customization and automation
- E-mail tracking from Outlook



Microsoft Dynamics 365 Sales



Lead view

NAVERTICA Naverica Sales App

Search

Home Recent Pinned My Work Dashboards Activities Customers Leads Accounts Contacts Sales Opportunities Opport. Products Competitors Invoice Overviews

HJ Hawthorn Jeff - Unsaved
Lead - Lead main form

Engaged Sales Stage Code Warm Rating Contacted Status **zajic jan** Owner

Summary Details Related

CONTACT

Topic * Dynamics 365 Sales

First Name * Jeff

Last Name * Hawthorn

Email Salutation Dear Mr Hawthorn

Title Prefix ---

Title Suffix ---

Mobile Phone +27 321 456 789

Business Phone +27 123 456 789

Job Title Sales Director

Description

Description
Interested in a new CRM solution. The company is dealing with business administration problems.

Contact Precise

Branch
Retail

Pipeline

Lead Source * **Partner referral**

Source Campaign

E-mail campaigns

NAVERTICA Naverica Sales App

Search

Home Recent Pinned My Work Dashboards Activities Customers Leads Accounts Contacts Sales Opportunities Opport. Products Competitors Invoice Overviews

TEST Template - Unsaved
Campaign

0 CZK Budget Allocated 01.02.2023 Actual Start Date Proposed Status Details **pilich vaclav** Owner

Summary Details Related

CAMPAIGN

Name * Newsletter campaign

Campaign Code CMP-01092-C1565

Campaign Type Advertisement

Primary Contact ---

Lead Source **Merk**

SCHEDULES

Actual End 15.02.2023

Actual Start 01.02.2023

Timeline

Search timeline

Enter a note...

PV Campaign Activity from pilich vaclav test1306 Active 13.06.2022 17:52

PV Campaign Activity from pilich vaclav TEST MAIL TEMPLATE Active 25.05.2022 10:01

Microsoft Dynamics 365 Sales



A complete and transparent database

Keep all the data about your customers, opportunities, and contacts **in one place**. Configure account relationships, attach documentation, and record contract billing.

Activities and timeline

Assign tasks, plan events, send e-mails or keep track of phone calls. Events are **automatically transcribed** to your calendar and sent e-mails are tracked back to Microsoft Dynamics 365 Sales. On the timeline, you can find a history of all records.

Marketing campaigns

Approach potential customers with **bulk e-mails** or send regular newsletters to your customers. Carry out campaigns with allocated budgets, evaluate their effectiveness and **attract new leads**.

Dashboards and reporting

Track the performance of your salespeople, **locate weak spots** and formulate a strategy based on the precious data. **Keep track of the actual status** of business opportunities or planned tasks and make well-thought-out decisions.

Product catalogs

Define product features and price specifications, create discount mechanisms, and set out **specific rules** for using these mechanisms. Add products to the offer and allow the system to **calculate the final price automatically**.

Microsoft Dynamics 365 Sales



Effective business management

Microsoft Dynamics 365 Sales allows you to **cover the entire sales process** from the initial contact to the execution of the sale. Thanks to the interactive **responsive design** and a mobile app, you can work from anywhere. Use business process flows to help your employees keep records **according to your internal regulations**. Send questionnaires to your customers and use the findings to streamline your sales strategy. Give salespeople priorities based on **AI** and predictive assessment. The Microsoft Dynamics 365 Sales solution can be **individually tailored to your needs** by creating specific workspace fields, forms, or interactions.

Unrivalled connectivity



Connectivity with **LinkedIn Sales Navigator** allows you to display corresponding LinkedIn profiles **directly in the CRM environment**. It connects the timelines of Dynamics 365, LinkedIn Sales Navigator, and Microsoft 365.



Integration with **Microsoft 365** Apps allows for editing quotations in Word, exporting reports to Excel, **complex tracing of e-mails, tasks, and events from Outlook**, or saving files to Microsoft SharePoint shared data storage.



Integrated **Teams** chat in the Dynamics 365 environment enables real-time collaboration **without switching between applications**. Thanks to Microsoft Teams, you can call a customer from the app's environment with a **single click**.



Using **Power Automate** can **automate** routine processes and save you precious time. The user is kept informed of any important changes, for example by sending an immediate e-mail with a description of the change.



Dynamics 365 Sales enables **native connection** to other Dynamics 365 apps. For example, when integrated with Dynamics 365 Marketing, leads can be generated from marketing campaigns and **passed on to sales department**.



Power BI allows you to create advanced interactive reports to assist with forecasting. Boxes and charts can be added directly to the Dynamics 365 environment. You can actively collaborate with other users on these reports.