

# Dynamics 365 for Sales Fixed Fee Implementation



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# Dynamics 365 Customer Engagement (CRM)

|  |   |                               |                       |                      |                       |                       |                           |
|--|---|-------------------------------|-----------------------|----------------------|-----------------------|-----------------------|---------------------------|
|  Sales                        | Opportunity management  | Social selling                | Content collaboration | Mobile sales         | Planning & management | Sales intelligence    |                           |
|  Customer Service             | Omni-channel  | Portal                        | Agent enablement      | Onsite service       | Knowledge             | Service intelligence  |                           |
|  Marketing *                  | +  |                               |                       |                      |                       |                       |                           |
|  Field Service                | Scheduling and dispatch   | Asset and warranty management | Service agreements    | Inventory management | Mobile                | Business Intelligence |                           |
|  Project Service Automation | Opportunity management  | Resource management           | Time and expenses     | Project planning     | Team collaboration    | Customer billing      | Analytics and integration |

\* Adobe and Microsoft announced plans for a strategic partnership. Microsoft will make Adobe Marketing Cloud its preferred marketing service for Dynamics 365 Enterprise edition.

# Entities Included in Dynamics 365 for Sales

## Shared Sales Entities

Account

Contact

## Specific Sales Entities

Leads

Opportunities

Analytics

Activities

# Assumptions, Exclusions & Deliverables

## Assumptions:

- The Fixed Fee Implementation of Dynamics 365 for Sales will be conducted remotely
- If conducted On-Site, then all travel costs will be billed separately.
- ACE will have access to Staff and Dynamics 365 for Sales end-users for interviews, process monitoring, discovery, and systems access.
- The personnel engaged during the Assessment with ACE will remain the same throughout the duration.
- Any changes to personnel could cause a change to the duration of the Assessment.
- Any changes could require a change order agreement to be signed.

## Deliverables:

- Offsite Business Process Review
- Configure Entities Utilized
- Train on Data Imports, Dashboards, Mobile App & Outlook Setup

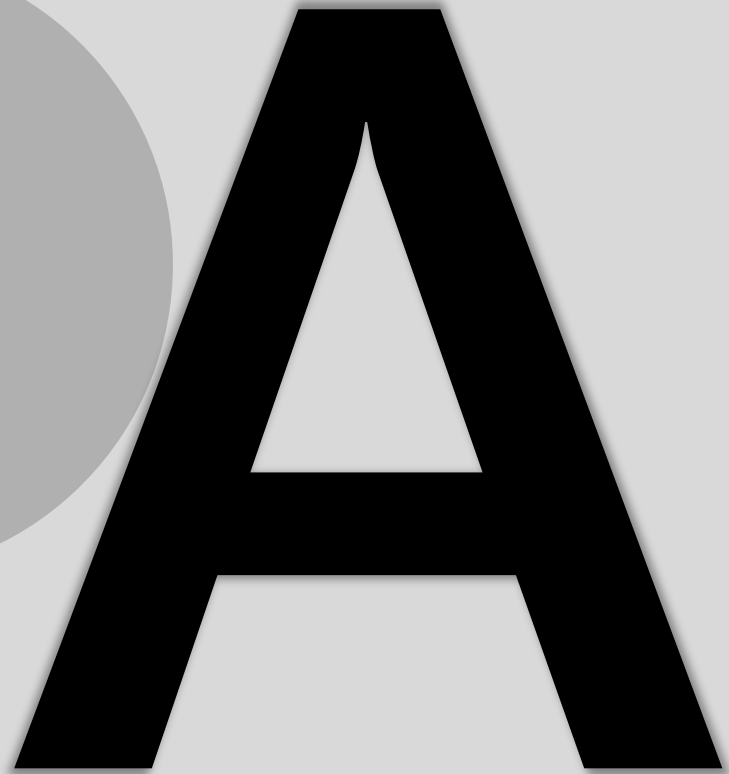
## Exclusions:

The Fixed Fee Implementation excludes the following:

- Software purchases.
- License purchases.

Provisioning and Setup of any:

- Office 365 Environments, Office 365 Users.
- No workflow or customizations in this phase
- No product configuration or quoting in this phase
- No integration to ancillary systems in this phase
- Office 365 setup or configuration.
- Troubleshooting of any network or hardware issues.
- Scheduling of any individuals or resources.
- Any travel costs incurred as a result of an On-site



Next  
Steps!