

# DYNAMICS UNLOCKED: SALES

Dynamics Unlocked: Sales is an affordable and streamlined implementation of Microsoft Dynamics 365 Sales intentionally designed to be a straight-forward solution to get your business up and running in the business application on your own schedule. Pre-scheduled training and consulting on how to navigate, utilize, and automate the Sales application, followed by continued support from the TruNorth Dynamics team all lead to a quick and successful solution.

The TruNorth Dynamics team is here to help discover and provide the best Dynamics 365 Sales solutions that will solve your business problems - including post go-live discussions on any customizations or business applications needed for your business's continued success.

## What does Dynamics Unlocked: Sales include?

- Automated installation and set-up of Microsoft Dynamics 365 Sales
- Set-up and preparation of two environments: the sandbox (for testing) and production (for go-live) environments
- Working and training sessions with the TruNorth Dynamics team that includes:

### END-USER TRAINING

- User and security group set-ups
- Data import “how-tos” and best practices
- General navigation
- Creating and setting personal views
- Tracking emails
- Assigning account ownership
- Activating and Deactivating records
- The Sales lifecycle

### ADMINISTRATIVE TRAINING

- Security
- Setting up mailboxes
- Audit
- Onboarding/offboarding users



## Dynamics Unlocked: Sales – Project Phases



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| <ul style="list-style-type: none"> <li>• Two environments will be created – a sandbox environment for testing and one for production.</li> <li>• The TruNorth “best practices” capabilities of Sales will be implemented into the environments.</li> </ul> | <ul style="list-style-type: none"> <li>• Schedule instructor-led working sessions and training sessions with the TruNorth Dynamics team</li> <li>• Import and input data into Sandbox (a demo environment)</li> <li>• System testing and data validation</li> </ul> | <ul style="list-style-type: none"> <li>• Import and input data into the Production environment</li> <li>• Data validation</li> </ul> | <ul style="list-style-type: none"> <li>• Archive legacy system</li> <li>• Mark Dynamics Unlocked Sales installation COMPLETE!</li> <li>• Schedule time with TruNorth Dynamics team to identify additional customization or training needs.</li> </ul> |
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