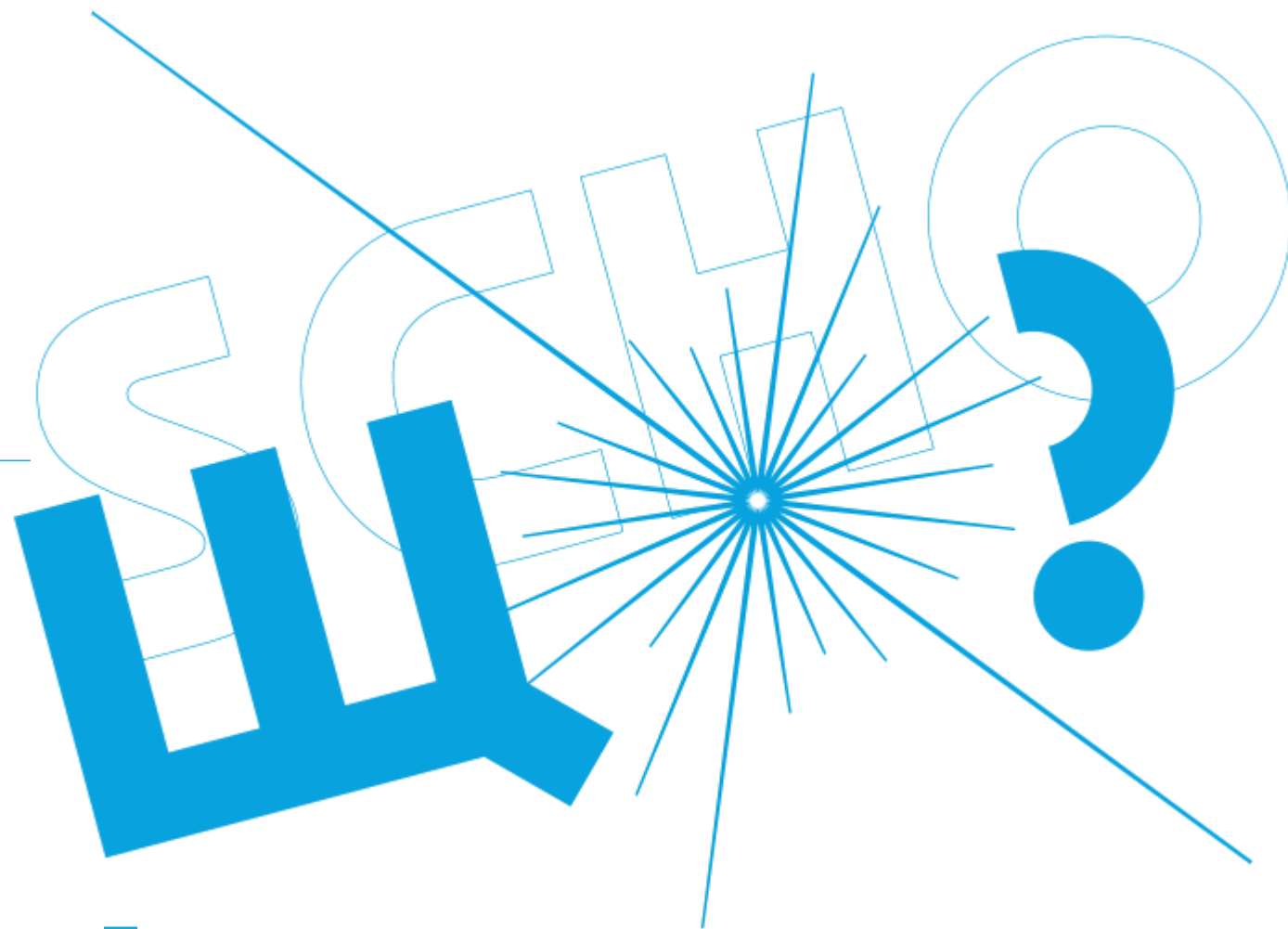


Еволюція Бізнесу

Вживає
Найпристосованіший



Анжела Позднякова



Чому компанії та люди бояться змін?



Навчання =
Більше роботи



Вихід з зони
комфорту



Невизначеність
майбутнього



Втрата
компетентності



Зламани процеси



Незадоволені
клієнти



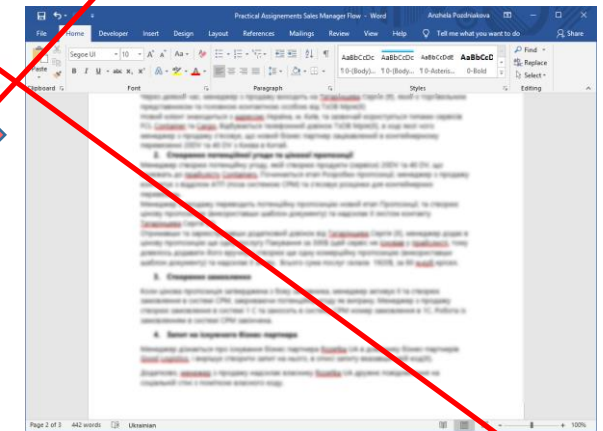
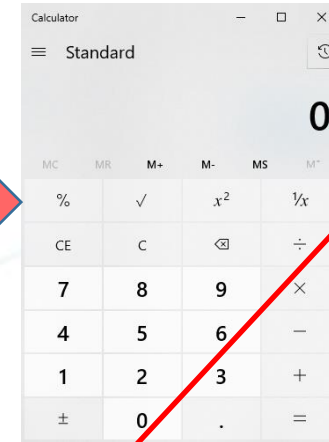
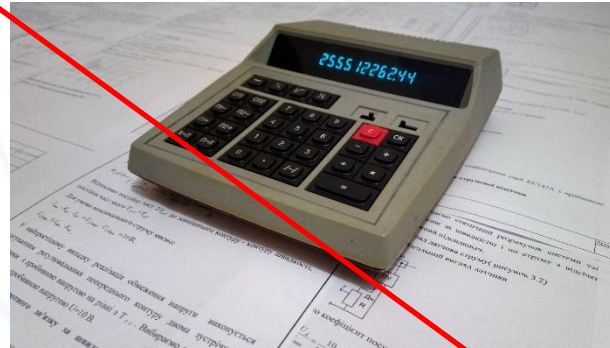
Ефективність =
Звільнення



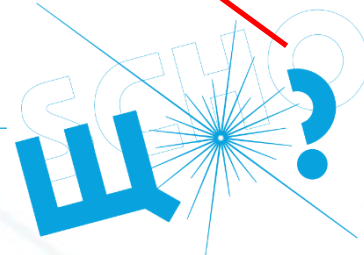
Що несуть з собою зміни?



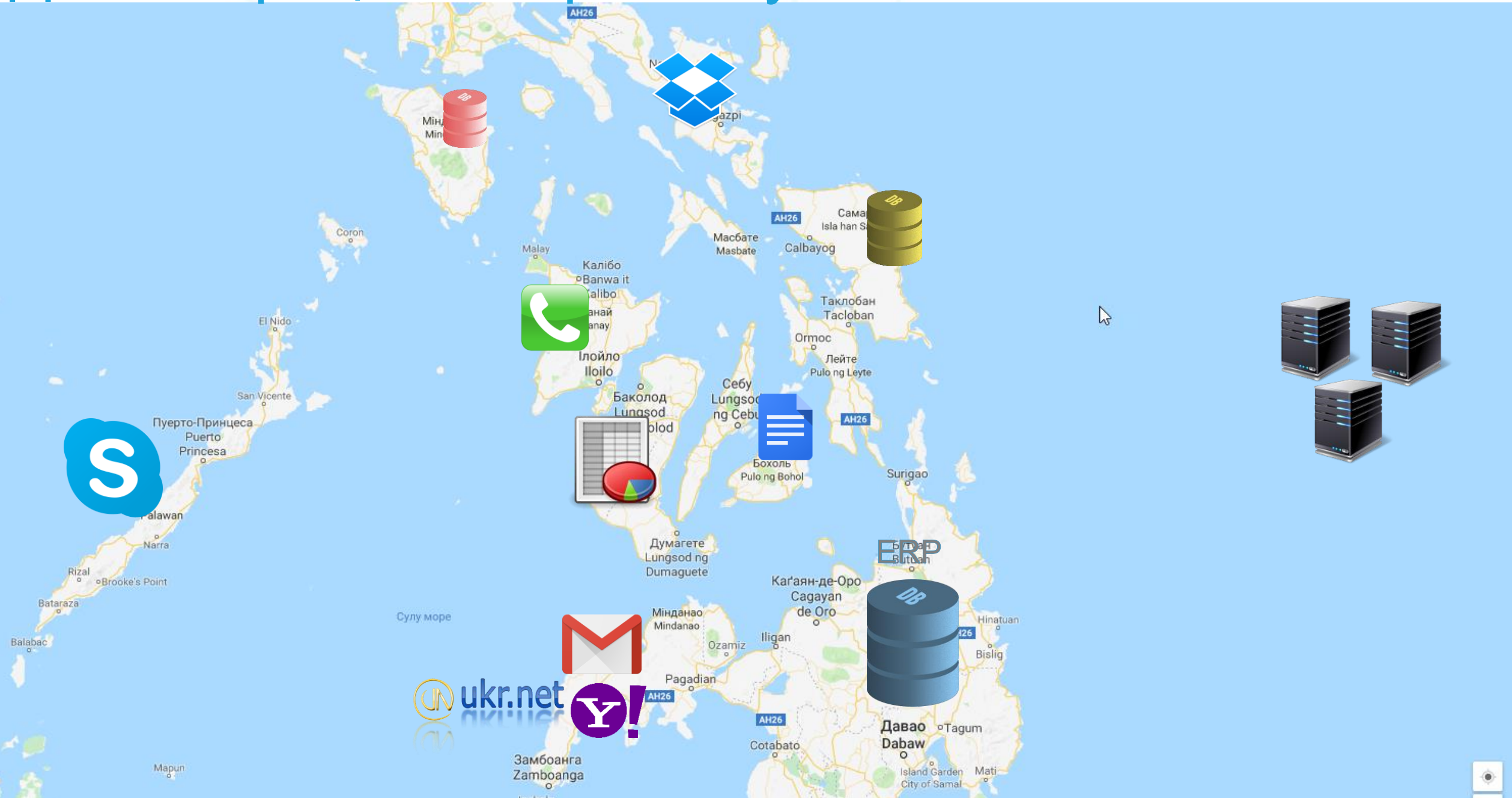
Перехід на нові технології



КОНФЕРЕНЦІЯ ДЛЯ ПІДПРИЄМСТВ,
ВІДКРИТИХ ДО НОВИХ МОЖЛИВОСТЕЙ



Дезінтеграція використаних технологій



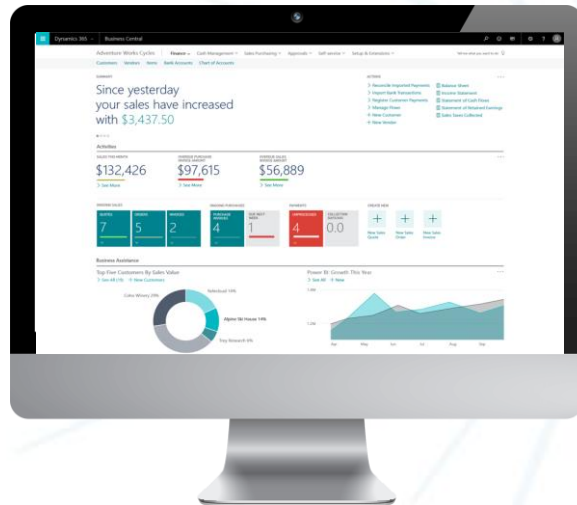
Що таке Microsoft 365 екосистема



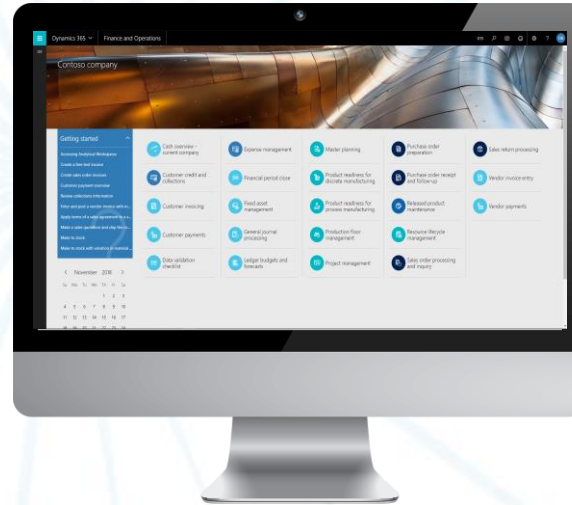
ERP системи Microsoft



Business Central



Finance and Operations



- ✓ 50-250 користувачів
- ✓ Малий середній бізнес що розвивається
- ✓ Швидкий термін впровадження
- ✓ Для бізнесу із нескладною організаційною структурою

- ✓ 250+ користувачів
- ✓ Середній та великий бізнес
- ✓ Потребує інвестицій по впровадженню
- ✓ Для бізнесу із складною організаційною структурою



Business Central. Точка входу

Dynamics 365 Business Central

Your trial period expires in 27 days. Do you want to get a subscription? Buy subscription...

CRONUS BE | Finance | Cash Management | Sales | Purchasing | Approvals | Self-Service | Setup & Extensions | Intelligent Cloud Insights

Customers | Vendors | Items | Bank Accounts | Chart of Accounts

INSIGHT FROM LAST MONTH

The largest posted sales invoice was for €24,758

ACTIONS

- + Sales Quote
- + Sales Invoice
- + Purchase Invoice
- > Payments
- > Setup
- + Sales Order
- + Purchase Order
- > New
- > Reports
- Excel Reports

Activities

Activities

SALES THIS MONTH: €1,915 > See more

OVERDUE SALES INVOICE AMOUNT: €93,254 > See more

OVERDUE PURCH. INVOICE AMOUNT: €54,901 > See more

SALES INVOICES PREDICT. OVERDUE: 0 > See more

ONGOING SALES

- SALES QUOTES: 2
- SALES ORDERS: 4
- SALES INVOICES: 7

ONGOING PURCHASES

- PURCHASE ORDERS: 4
- ONGOING PURCH. INVOICES: 3
- PURCH. INVOICE NEXT WEEK: 0

PAYMENTS

- UNPROCESSED PAYMENTS: 1
- AVERAGE COLL. DAYS: 0.0
- OUTSTANDING INVOICES: 10

INCOMING DOCUMENTS: 0

MY USER TASKS

- PENDING USER TASKS: 0

START

- + Sales Quote
- + Sales Order
- + Sales Invoice
- + Purchase Invoice
- + Sales Return Order

PRODUCT VIDEOS

- Product Videos

GET STARTED

- Replay Getting Started

Insights

Business Assistance

Top vijf van klanten gerangschikt op omzetwaarde

Self-Service

TIME SHEETS

- OPEN TIME SHEETS: 0
- SUBMITTED TIME SHEETS: 0
- REJECTED TIME SHEETS: 0
- APPROVED TIME SHEETS: 0

APPROVALS

- REQUESTS TO APPROVE: 0

Favorite Accounts

| ACCOUNT NO. | NAME | BALANCE |
|-------------|------------------------------|-----------|
| 550000 | Bankrekening, Lokale valuta | 0.00 |
| 550005 | Bankrekening, Verwerking | 0.00 |
| 550010 | Bankrekening, Vreemde valuta | 0.00 |
| 560000 | Postcheque en girodienst | 0.00 |
| 570000 | Kas | 57.055.86 |

Power BI Reports

You do not have a Power BI account. You can get a Power BI account at the following location:
<https://powerbi.microsoft.com>

КОНФЕРЕНЦІЯ ДЛЯ ПІДПРИЄМСТВ,
ВІДКРИТИХ ДО НОВИХ МОЖЛИВОСТЕЙ



Finance and Operations. Точка входа

The image displays the Dynamics 365 Finance and Operations user interface. It is divided into several main sections:

- Navigation Pane (Left):** Contains a 'Getting started' section with tasks like 'Accessing Analytical Workspaces' and 'Create a free text invoice'. Below this is a calendar for November 2018, with the 28th highlighted. A list of main navigation items includes 'Cash overview - current company', 'Customer credit and collections', 'Customer invoicing', 'Customer payments', 'Data validation checklist', 'Expense management', and 'Financial period close'. The 'Customer credit and collections' and 'Customer invoicing' items are highlighted with yellow boxes.
- Dashboard (Top Right):** Titled 'Manage customer credit and collections', it features a 'My work' section with filters for 'Company' (USMF) and 'Customer account'. It includes a 'Power BI' section with a 'Total Revenue this year' tile showing '39.65K'. Two charts are present: 'Aging period definition' (a pie chart showing '180 and over', '90 days', '60 days', '30 days', and 'Current') and 'Balance by status' (a pie chart showing 'Promised to pay', 'Promise to pay broken', 'Disputed', and 'Other').
- Customer Invoicing Page (Bottom Right):** Titled 'Customer invoicing', it has a 'Summary' section with metrics for 'Shipped but not invoiced sales orders' (0), 'Sales orders on hold' (0), 'Free text invoices assigned to me' (0), 'Unposted free text invoices' (4), and 'Unposted recurring invoice groups' (0). A 'Links' sidebar on the right lists actions like 'Invoice', 'Sales order batch', and 'Free text invoice batch'. A table of transactions is highlighted with a green box:

| Invoice | Customer account | Name | Date | Due date | Invoice amount | Currency |
|--------------|------------------|--------------------------|-----------|-----------|----------------|----------|
| FTI-00000003 | US-001 | Contoso Retail San Diego | 1/21/2016 | 1/31/2016 | 268.13 | USD |
| FTI-00000004 | US-001 | Contoso Retail San Diego | 6/23/2017 | 7/3/2017 | 10.73 | USD |
| FTI-00000005 | US-001 | Contoso Retail San Diego | 6/23/2017 | 7/3/2017 | 10.73 | USD |
| FTI-00000006 | US-001 | Contoso Retail San Diego | 6/23/2017 | 7/3/2017 | 10.73 | USD |

Business Central. Навігація

The screenshot displays the Microsoft Dynamics 365 Business Central interface. The top navigation bar includes 'Dynamics 365', 'Business Central', and 'Sales Invoices > Items'. A search icon in the top right corner is highlighted with a red box. A search window titled 'TELL ME WHAT YOU WANT TO DO' is open, showing search results for the term 'vendor'. The results are categorized into 'On current page (Item List)', 'Go to Pages and Tasks', 'Go to Reports and Analysis', and 'Documentation'. The 'On current page' section includes 'Vendors', 'Item/Vendor Catalog', and 'Inventory - Vendor Purchases'. The 'Go to Pages and Tasks' section includes 'Vendors', 'Pay Vendor', and 'Vendor Check'. The 'Go to Reports and Analysis' section includes 'Vendor List', 'Vendor Register', and 'Vendor - Labels'. The 'Documentation' section includes 'Synchronize Contacts With Customers and Vendors', 'Overview of Tasks to Manage Payments to Vendors', and 'Reconcile Vendor Payments Manually'. The background shows the 'Items' page with a search bar and a list of items, including 'ATHENE Tafel' and 'ATHENE Mobiel onderstel'.

Dynamic 365 Business Central Sales Invoices > Items

TELL ME WHAT YOU WANT TO DO

vendor

On current page (Item List)

- Vendors View the list of vendors who can supply the item, and at which lead time.
- Item/Vendor Catalog View a list of the vendors for the selected items. For each combination of item and ve...
- Inventory - Vendor Purchases View a list of the vendors that your company has purchased items from within a select...

Go to Pages and Tasks Show all (8)

- Vendors Lists
- Pay Vendor Tasks
- Vendor Check Tasks

Go to Reports and Analysis Show all (19)

- Vendor List Reports and Analysis
- Vendor Register Reports and Analysis
- Vendor - Labels Reports and Analysis

Documentation Show all (20)

- Synchronize Contacts With Customers and Vendors You couple or synchronize contact information of contacts who are also customers, ve...
- Overview of Tasks to Manage Payments to Vendors Outlines tasks to manage payments to vendors or creditors, including posting payme...
- Reconcile Vendor Payments Manually To process, match, or reconcile vendor payments or refunds manually, you apply the a...

Items

Search + New

1896-S ATHENE Tafel 1,005.80







1906-S ATHENE Mobiel onderstel 435.80

Total Qty. Purchased 57.00

1896-S FIFO Yes Yes 0.00 784.60 0.00 0

Finance and Operations. Навігація

Dynamics 365 Finance and Operations

015      

- ▲ Favorites
 - Favorites created using the navigation pane will show up here.
- ▶ Recent
- ▲ Workspaces
 - Cash overview - current company
 - Customer credit and collections
 - Customer invoicing
 - Customer payments
 - Data validation checklist
 - Expense management
 - Financial period close
 - Fixed asset management
 - General journal processing
 - Ledger budgets and forecasts
 - Master planning
 - Product readiness for discrete manufacturing
 - Product readiness for process manufacturing
 - Production floor management
 - Project management
 - Purchase order preparation
- Orders
 - Orders past due
 - Orders who are diverse
 - Order search
 - Order inactivation
 - Order/item relations
 - Order collaboration requests
 - Orders
 - Orderment catalogs
 - Order catalogs
 - Prices and discounts
 - Vendor discount groups
 - Order agreement journals
 - Order agreements
 - Order agreements
 - Order agreement fulfillment report
 - Order rebates
 - Order agreements
 - Order claims
 - Order update
 - Order program types
- ▲ Consignment
 - Consignment replenishment orders
 - Inventory ownership change
 - Procurement categories
- ▲ Inquiries and reports
 - ▶ Order posting
 - ▶ Transaction reports
 - ▶ Vendor reports
 - ▶ Procurement category reports
 - ▶ Status
 - ▶ Purchase requisition statistics
- ▲ Periodic tasks
 - Finalize purchase orders
 - ▶ Clean up
- ▲ Setup
 - Procurement and sourcing parameters
 - Procurement and sourcing workflows
 - Summary update parameters
- ▲ Vendors
 - Vendor groups
 - Vendor reasons
 - Vendor evaluation criteria
 - Vendor evaluation criterion groups
 - Vendor catalog import parameters
 - Line of business
 - ▶ Vendor collaboration
 - ▶ Policies
 - ▶ Prices and discounts
 - ▲ Charges
 - Charges code
 - Vendor charges group
 - Item charge groups
 - Automatic charges
 - ▶ Supplementary items
 - External item description group
- ▲ Distribution
 - Terms of delivery
 - Modes of delivery
 - Destination codes
 - ▶ Forms
- Product relationship types
 - ▶ Request for quotation
 - Purchase agreement classification
 - ▶ Purchase orders
 - ▶ Fixed assets

Business Central - Зберігання інформації






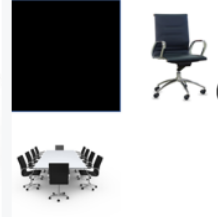




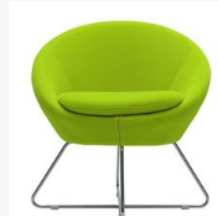

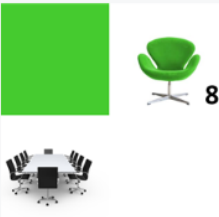


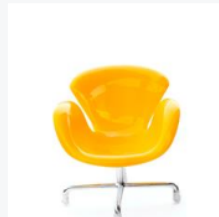


Dynamics 365 Business Central Sales Invoices Items

CRONUS BE

You can get the sales forecast updated automatically every week. Set Up Scheduled Forecasting | Don't ask again

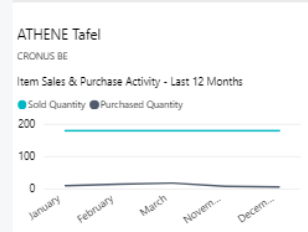
Items

Search + New Manage Process Report Item Request Approval Inventory Attributes Edit In Excel Actions Navigate Report Less options

| | | | | | |
|---|---|---|--|---|---|
|  1896-S ATHENE Tafel 1,005.80 4 STUKS |  1900-S PARIJS Bezoekersstoel, zwart 193.70 0 STUKS |  1906-S ATHENE Mobiel onderstel 435.80 5 STUKS |  1908-S LONDEN Draaistoel, blauw 191.00 3 STUKS |  1920-S ANTWERPEN Vergadertafel 651.10 10 STUKS |  1925-W Vergaderpakket 1-6 189.80 0 STUKS |
|  1928-S AMSTERDAM Lamp 55.20 8 STUKS |  1929-W Vergaderpakket 1-8 235.00 0 STUKS |  1936-S BERLIJN Bezoekersstoel, geel 193.70 100 STUKS |  1953-W Gastsectie 1 126.40 -49 STUKS |  1960-S ROME Bezoekersstoel, groen 193.70 2 STUKS |  1964-S TOKYO Bezoekersstoel, blauw 193.70 4 STUKS |
|  1965-W Vergaderpakket 2-8 235.00 -81 STUKS |  1968-S MEXICO Draaistoel, zwart 191.00 10 STUKS |  1969-W Vergadersysteem 1 343.50 -7 STUKS |  1972-S MÜNCHEN Draaistoel, geel 191.00 0 STUKS |  1980-S MOSKOU Draaistoel, rood 191.00 0 STUKS |  1988-S SEOUL Bezoekersstoel, rood 193.70 0 STUKS |

Power BI Reports

ATHENE Tafel
CRONUS BE
Item Sales & Purchase Activity - Last 12 Months



Total Qty. Sold: 180.00
Total Qty. Purchased: 57.00

Item Details - Invoicing

| | |
|-----------------------|----------|
| Item No. | 1896-S |
| Costing Method | FIFO |
| Cost is Adjusted | Yes |
| Cost is Posted to G/L | Yes |
| Standard Cost | 0.00 |
| Unit Cost | 784.60 |
| Overhead Rate | 0.00 |
| Indirect Cost % | 0 |
| Last Direct Cost | 784.60 |
| Profit % | 5.61086 |
| Unit Price | 1,005.80 |

Item Details - Planning

| | |
|-------------------------|--------|
| Item No. | 1896-S |
| Reordering Policy | |
| Reorder Point | 25 |
| Reorder Quantity | 0 |
| Maximum Inventory | 0 |
| Overflow Level | 0 |
| Time Bucket | |
| Lot Accumulation Period | |

20000
15,410.69
0.00
0.00
1,217.02
16,627.71
0.00
14,238.80
21,590.20
0.00
20000
@contoso.com
0.00
0.00
14 DAGEN
Karen Snow

Finance and Operations - Зберігання інформації

The screenshot displays the Microsoft Dynamics 365 Finance and Operations interface. The top navigation bar shows the path: Retail > Customers > All customers. The main menu includes options like Edit, New, Delete, and various functional areas such as CUSTOMER, SELL, INVOICE, COLLECT, PROJECTS, SERVICE, MARKET, RETAIL, GENERAL, and OPTIONS. A secondary menu lists categories like ACCOUNTS, TRANSACTIONS, BALANCE, FORECAST, SET UP, ATTACHMENTS, CATALOGS, CUSTOMER SERVICE, REGISTRATION, and PROPERTIES. A red box highlights the top navigation and menu areas.

Below the navigation, a table lists all customers. The table has columns for Account, Name, Invoice account, Customer group, Currency, Telephone, and Extensio. The row for 'US-001 - Contoso Retail San Diego' is selected, and a blue arrow points to its details view.

| Account | Name | Invoice account | Customer group | Currency | Telephone | Extensio |
|---------|----------------------------|-----------------|----------------|----------|--------------|----------|
| DE-001 | Contoso Europe | | 90 | EUR | 01234 56789 | |
| US-001 | Contoso Retail San Diego | | 30 | USD | 321-555-0160 | |
| US-002 | Contoso Retail Los Angeles | | 30 | USD | 123-555-0111 | |
| US-003 | Forest Wholesales | | 10 | USD | 123-555-0159 | |
| US-004 | Cave Wholesales | | | | | |
| US-005 | Contoso Retail Seattle | | | | | |
| US-006 | Contoso Retail Portland | | | | | |
| US-007 | Desert Wholesales | | | | | |
| US-008 | Sparrow Retail | | | | | |
| US-009 | Owl Wholesales | | | | | |
| US-010 | Sunset Wholesales | | | | | |
| US-011 | Contoso Retail Dallas | | | | | |
| US-012 | Contoso Retail New York | | | | | |
| US-013 | Pelican Wholesales | | | | | |
| US-014 | Grebe Wholesales | | | | | |
| US-015 | Contoso Retail Chicago | | | | | |

The detailed view for 'US-001 : Contoso Retail San Diego' shows the following information:

- General:** Name: Contoso Retail San Diego, Account: US-001, Type: Organization, Customer group: 30, Classification group: [blank].
- ORGANIZATION DETAILS:** Number of employees: 0, Organization number: 3001, AIC code: None, DUNS number: [blank].
- OTHER INFORMATION:** Address books: RetailCust, Language: en-us.
- Primary address:** 456 Peach Road, San Diego, CA92114, USA.
- Recent activity:** Last invoice: 6/23/2017, Invoice amount: 10.73, Last payment: [blank], Payment amount: 0.00.

A red box highlights the right-hand side of the interface, including the 'OPEN IN EXCEL' and 'EXPORT TO EXCEL' buttons, and the detailed view of the customer record.

Business Central – Персоналізація Інтерфейсу

Navigation bar: Dynamics 365 | Business Central | Personalizing: Activities (Done) | More

CRONUS BE | Finance | Cash Management | Sales | Purchasing | Approvals | Self-Service | Setup & Extensions | Intelligent Cloud Insights

Customers | Vendors | Items | Bank Accounts | Chart of Accounts

AI MEINE IDEE WILN 10 UNITS SOLD

Activities

SALES THIS MONTH: €1,915 > See more

OVERDUE SALES INVOICE AMOUNT: €93,254 > See more

OVERDUE PURCH. INVOICE AMOUNT: €54,901 > See more

SALES INVOICES PREDICT. OVERDUE: 0 > See more

ONGOING SALES: SALES QUOTES (2), SALES ORDERS (4), SALES INVOICES (7)

ONGOING PURCHASES: PURCHASE ORDERS (4), ONGOING PURCH. INVOICES (3), PURCH. INVOI... NEXT WEEK (0)

PAYMENTS: UNPROCESSED PAYMENTS (1), AVERAGE COL. DAYS (0.0)

INCOMING DOCU...: INCOMING JUMENTS

MY USER TASKS: PENDING USER TASKS (0)

START: Sales Quote, Sales Order, Sales Invoice, Purchase Invoice, Sales Return Order

PRODUCT VIDEOS: Product Videos

GET STARTED: Replay/Getting Started

Insights

Business Assistance | Top vijf van klanten gerangschikt op omzetwaarde

| ACCOUNT NO. | NAME | BALANCE |
|-------------|------------------------------|---------|
| 550000 | Bankrekening, Lokale valuta | 0.00 |
| 550005 | Bankrekening, Verwerking | 0.00 |
| 550010 | Bankrekening, Vreemde valuta | 0.00 |
| 560000 | Postcheque en girodienst | 0.00 |

Self-Service TIME SHEETS: OPEN TIME SHEETS (0), SUBMITTED TI... SHEETS (0), REJECTED TIME SHEETS (0), APPROVED TI... SHEETS (0)

PENDING TIME SHEETS: SUBMITTED TI... SHEETS (0), REJECTED TIME SHEETS (0), APPROVED TI... SHEETS (0)

APPROVALS

Finance and Operations - Персоналізація Інтерфейсу

The screenshot displays the Microsoft Dynamics 365 Finance and Operations interface. The top navigation bar includes the Dynamics 365 logo, the application name 'Finance and Operations', and user information '015'. The main header shows the current page 'New free text invoice' with 'OPTIONS' and a search icon. The main content area is titled 'Customer invoicing' and features a 'Summary' section with five cards: 'Shipped but not invoiced sales orders' (0), 'Sales orders on hold' (0), 'Free text invoices assigned to me' (0), 'Unposted free text invoices' (6), and 'Unposted recurring invoice groups' (0). A 'Personalize' context menu is open over the 'Sales orders on hold' card, showing a search field with 'ContentGrid' and options: 'Hide', 'Skip in Tab key sequence', 'Don't edit', and 'Add a field'. Below the menu is a 'Personalize this form' button. To the right, the 'Orders and invoices' section contains a table with columns 'Invoice', 'Customer account', 'Name', and 'Date'. The table lists four transactions for 'Contoso Retail San Diego' with dates ranging from 1/21/2016 to 6/23/2017. A 'Filter' input field is located above the table. The bottom of the interface shows search fields for 'Find customer' and 'Find sales order', along with a 'See more' link.

0 Shipped but not invoiced sales orders

0 Sales orders on hold

0 Free text invoices assigned to me

6 Unposted free text invoices

0 Unposted recurring invoice groups

Shipped but not invoiced sales orders

Sales orders on hold

Personalize

ContentGrid

Hide

Skip in Tab key sequence

Don't edit

+ Add a field

Personalize this form

Find customer

Find sales order

See more

| Invoice | Customer account | Name | Date |
|--------------|------------------|--------------------------|-----------|
| FTI-00000003 | US-001 | Contoso Retail San Diego | 1/21/2016 |
| FTI-00000004 | US-001 | Contoso Retail San Diego | 6/23/2017 |
| FTI-00000005 | US-001 | Contoso Retail San Diego | 6/23/2017 |
| FTI-00000006 | US-001 | Contoso Retail San Diego | 6/23/2017 |






Business Central. Integrated Power BI

Dynamics 365 Business Central Sales Orders > Vendors

Vendors

Search + New Manage Process New Document Vendor Edit In Excel Actions [Navigate](#) Report Less options

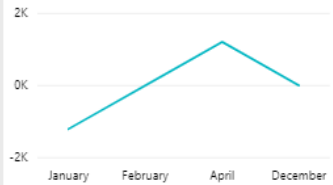
Vendor Purchases Documents History

| | | | | |
|--|---|--|--|--|
|  <p>10000 Fabrikam, Inc. Krystal York</p> <p>1,964.30 1,964.30</p> |  <p>20000 First Up Consultants Stan Henthorn</p> <p>5,627.83 5,627.83</p> |  <p>30000 Graphic Design Institute Bryce Jasso</p> <p>6,619.90 6,619.90</p> |  <p>40000 Wide World Importers Jesse Lohman</p> <p>20,871.66 20,871.66</p> |  <p>50000 Nod Publishers Wander Harmsen</p> <p>19,817.75 19,817.75</p> |
|--|---|--|--|--|

Power BI Reports

Fabrikam, Inc.
CRONUS BE

Vendor Activity - Last 12 Months



| | |
|---------------------|----------|
| Balance Due | 1,964.30 |
| Remaining Discounts | 0.00 |

Vendor Statistics

| | |
|--------------------------------------|----------|
| Balance (LCY) | 1,964.30 |
| Outstanding Orders (LCY) | 5,492.20 |
| Amt. Rcd. Not Invd. (LCY) | 0.00 |
| Outstanding Invoices (LCY) | 215.50 |
| Total (LCY) | 7,672.00 |
| Overdue Amounts (LCY) as of 04/09/18 | 1,964.30 |
| Invoiced Prepayment Amount (LCY) | 0.00 |

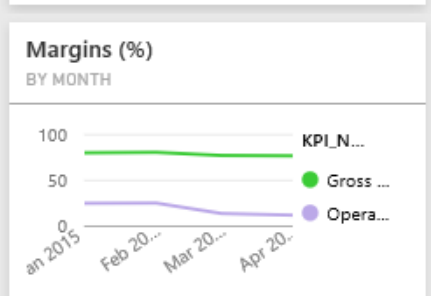
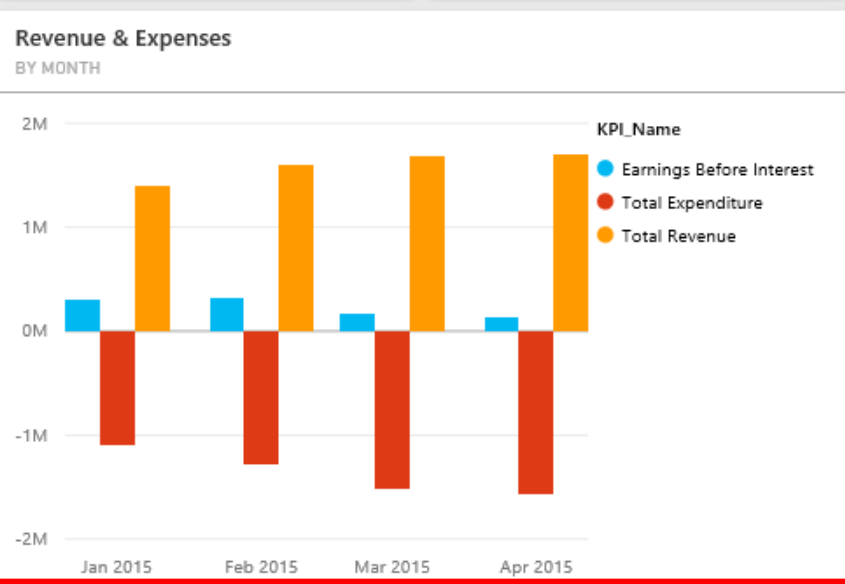
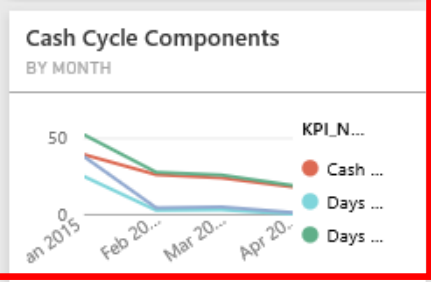
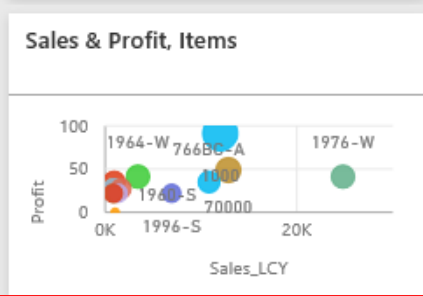
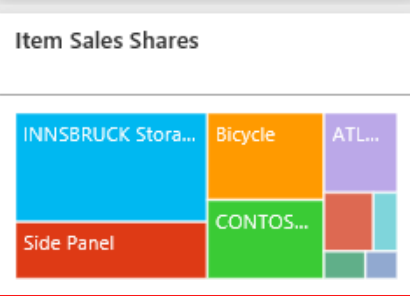
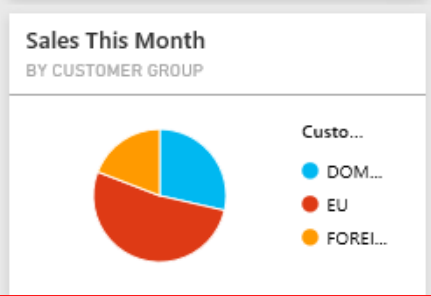
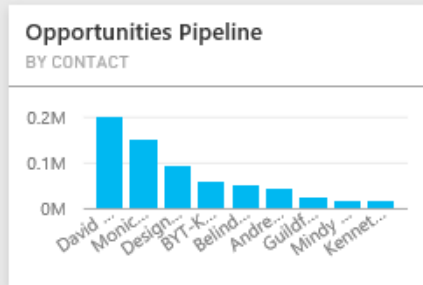
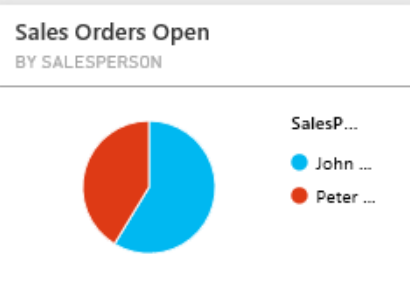
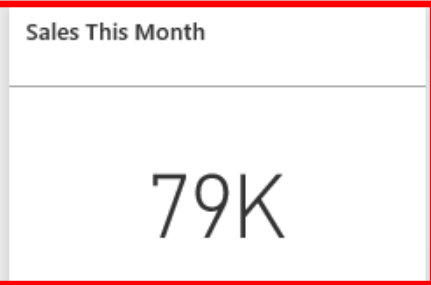
Buy-from Vendor History

| | | | |
|---------------|----------------|------------------------|----------------|
| 0 | 0 | 1 | 1 |
| Quotes | Blanket Orders | Orders | Invoices |
| 0 | 0 | 0 | 17 |
| Return Orders | Credit Memos | Pstd. Return Shipments | Pstd. Receipts |

Microsoft Dynamics NAV Share Dashboard

Ask a question about the data on this dashboard

[How to ask](#)

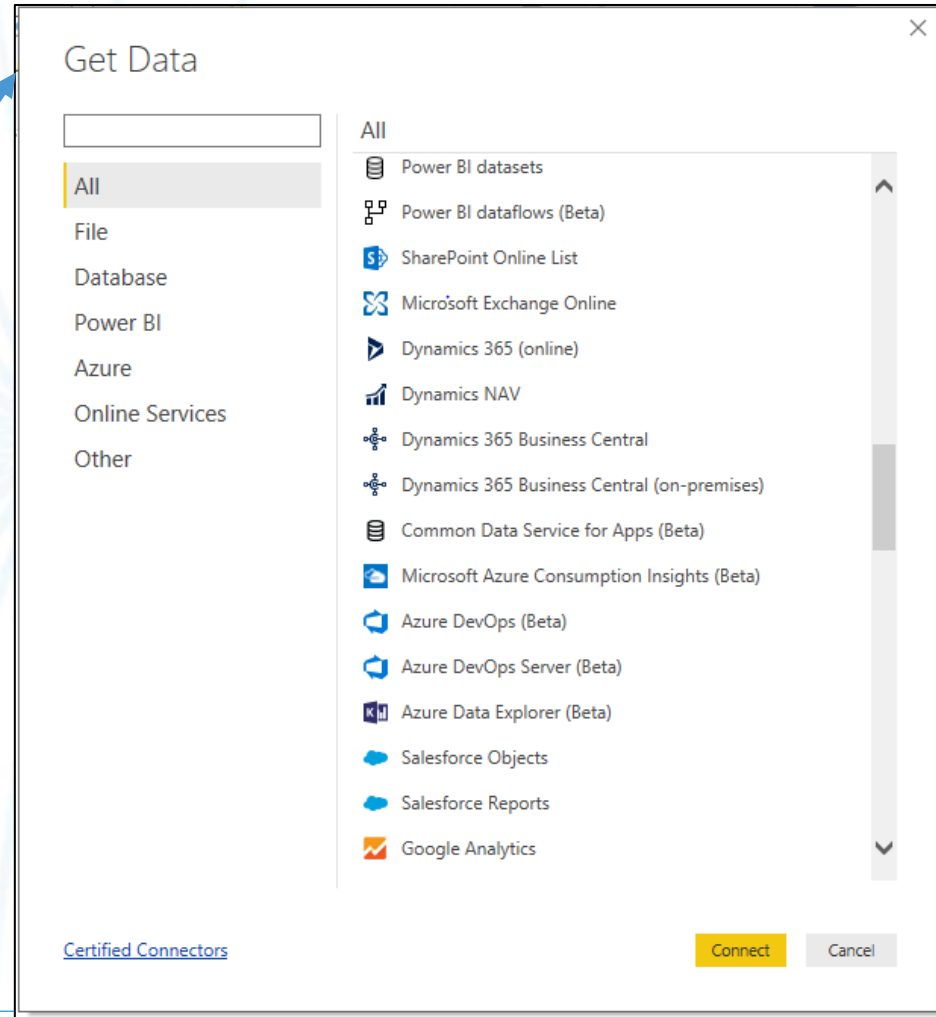
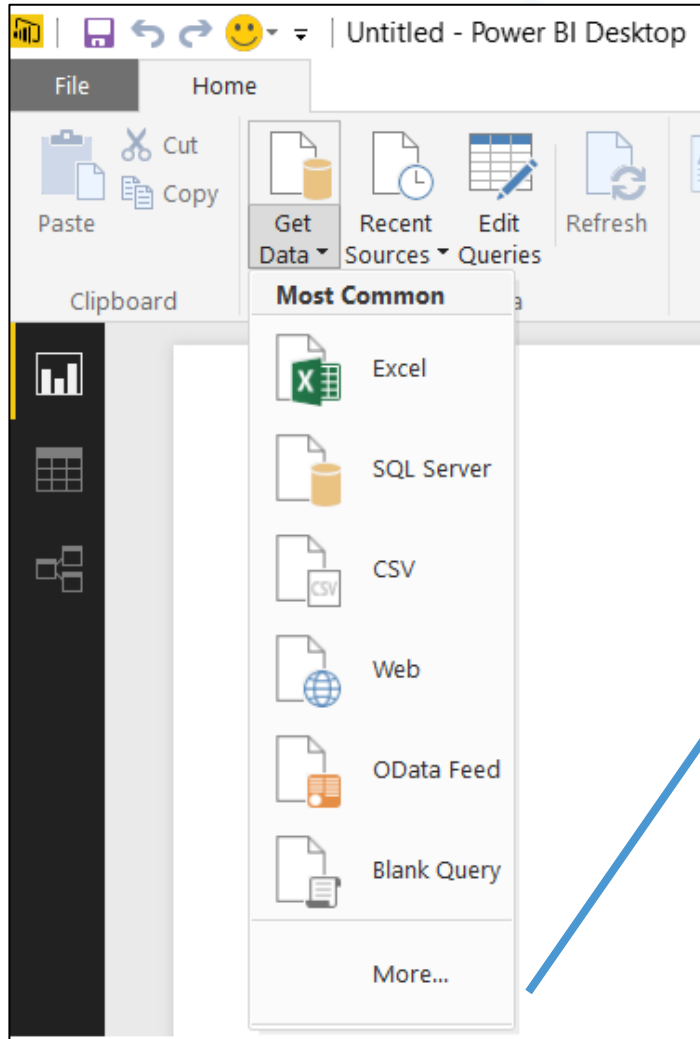


Trial Balance

BY MONTH

| KPI_Name | Net_Change_Actual |
|--------------------------------|-------------------|
| Gross Margin | 1,300,920.00 |
| Gross Margin % | 76.89 |
| Income before Interest and Tax | 129,760.00 |
| Operating Expenses | 1,097,640.00 |
| Operating Margin | 203,280.00 |
| Operating Margin % | 12.01 |
| Other Expenses | 73,520.00 |
| Total Cost | -391,080.00 |
| Total Revenue | 1,692,000.00 |

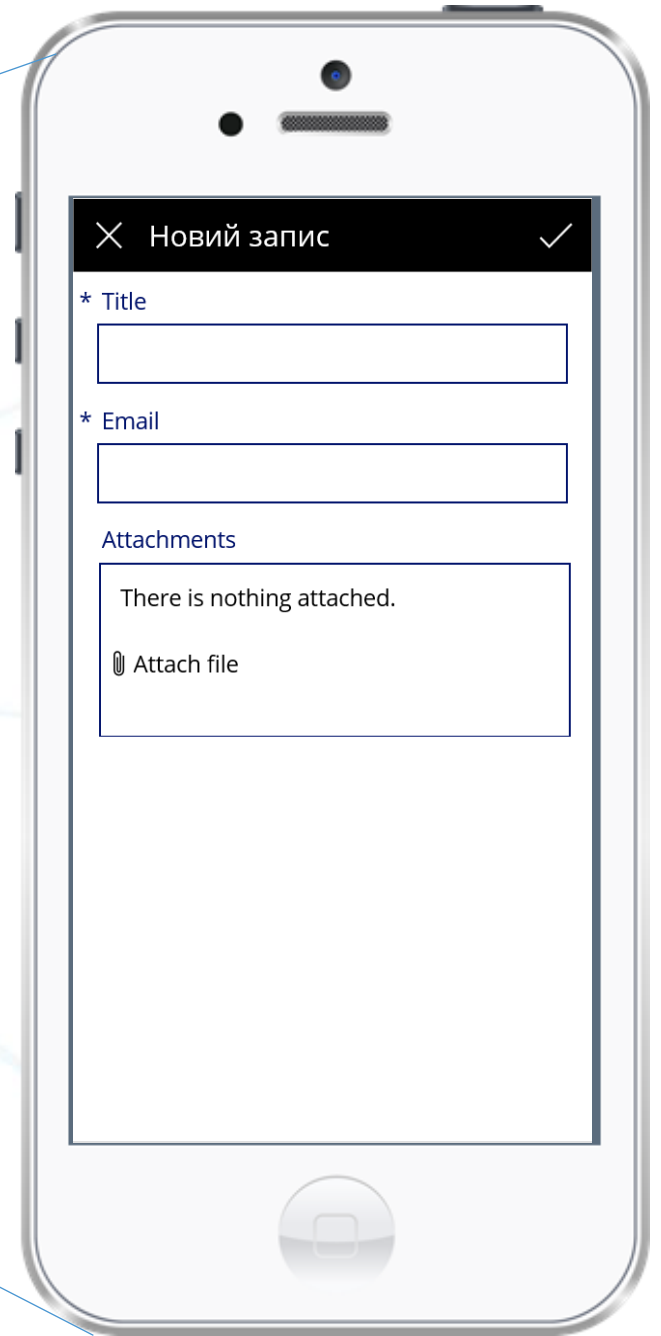
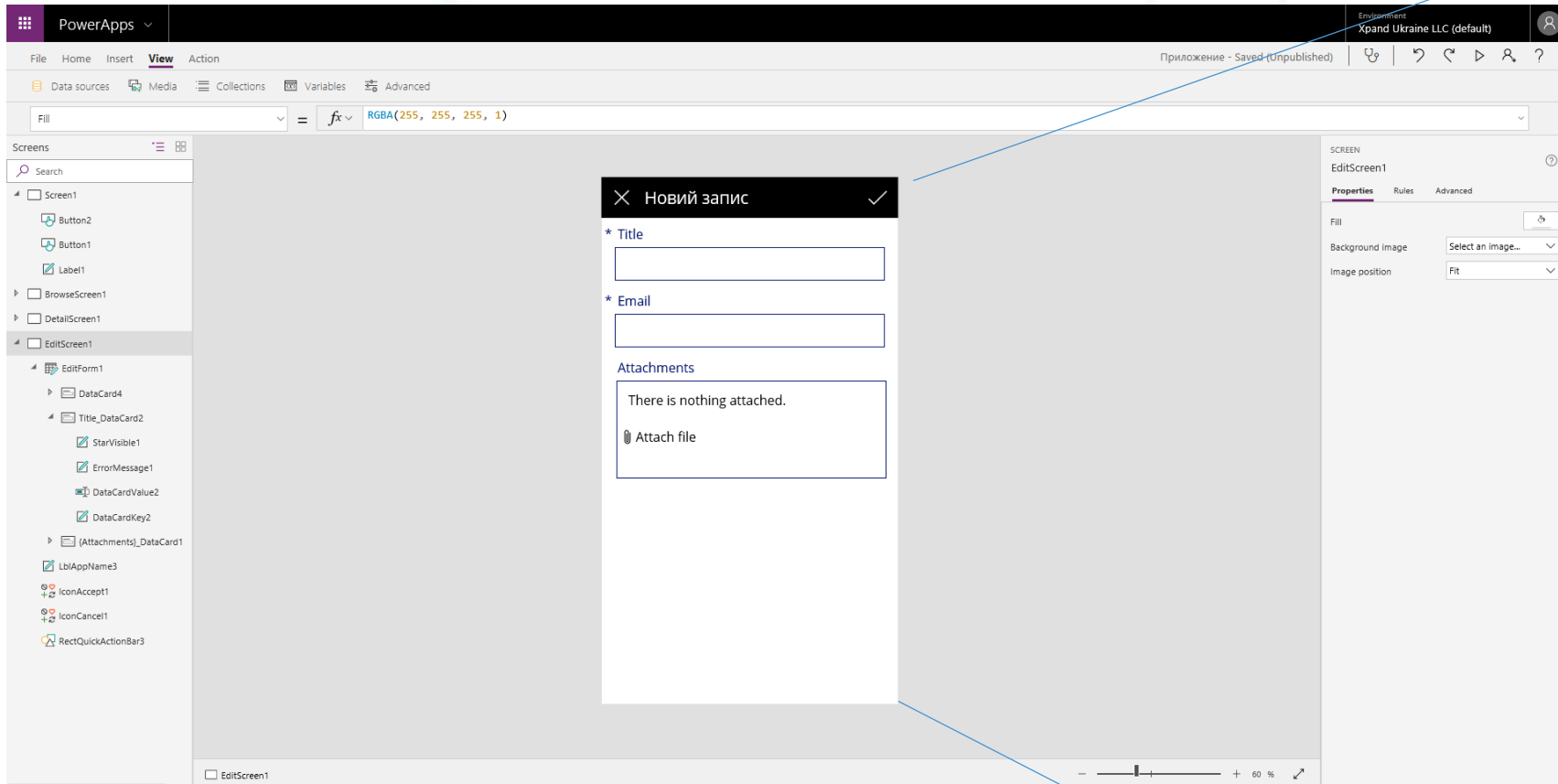
Power BI. Джерела даних



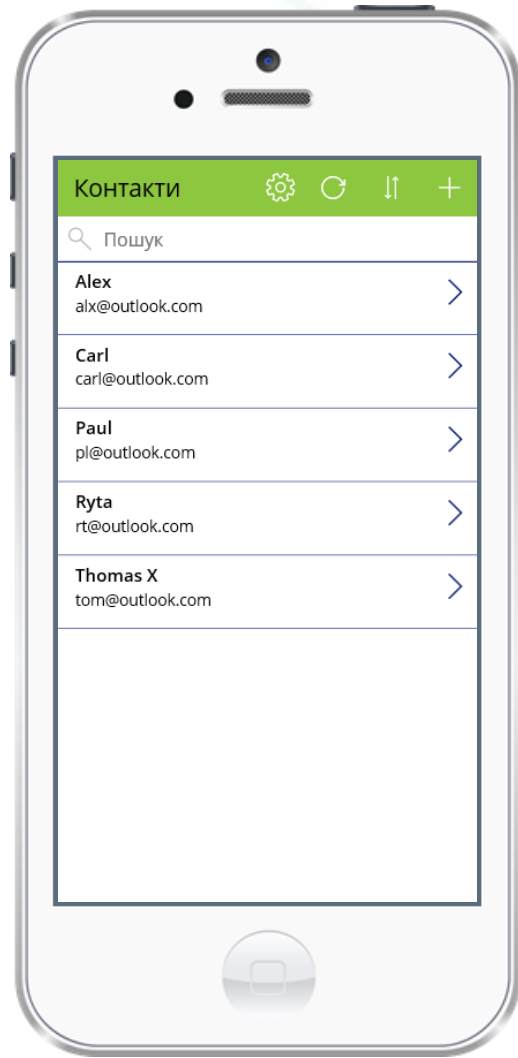
КОНФЕРЕНЦІЯ ДЛЯ ПІДПРИЄМСТВ,
ВІДКРИТИХ ДО НОВИХ МОЖЛИВОСТЕЙ



PowerApps



PowerApps



Автоматизовані процеси Microsoft Flows



Дані з різних джерел

A rounded rectangular box containing logos for various data sources and services: Google Drive, Microsoft Dynamics 365, Microsoft Dynamics NAV, SharePoint, Dropbox, and OneDrive. There are three dots at the bottom of the box, indicating more sources are available.

КОНФЕРЕНЦІЯ ДЛЯ ПІДПРИЄМСТВ,
ВІДКРИТИХ ДО НОВИХ МОЖЛИВОСТЕЙ



My Flows



Генерування документа в потрібному форматі при створенні нового запису в системі



Додавання згенерованого документа у вкладення шаблону листа

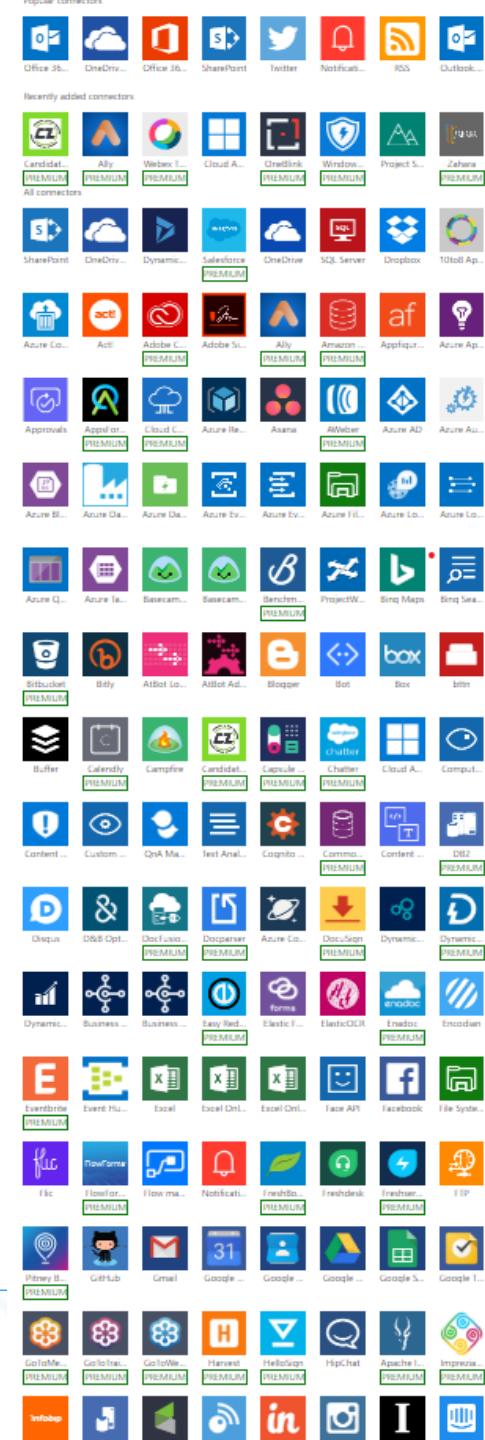


Відправлення листа з використанням заздалегідь сформованого шаблону



Виконання дій з великою кількістю сервісів

КОНФЕРЕНЦІЯ ДЛЯ ПІДПРИЄМСТВ,
ВІДКРИТИХ ДО НОВИХ МОЖЛИВОСТЕЙ



Dynamics 365 for Sales (CRM)

Open Opportunities

| Sales Stage | Revenue (€) |
|-------------|---------------|
| Close | 103,814.00 |
| Develop | 23,226,410.00 |
| Propose | 22,508,363.00 |
| Qualify | 29,268,605.00 |

All Opportunities

| Status | Count |
|--------|-------|
| Lost | 11 |
| Open | 45 |
| Won | 31 |

Open Leads

| Name | Topic | Status |
|---------------|-------------------------------|--------|
| Alex Wu | Expressed interest in A. D... | New |
| Allison Brown | Wants to expand | New |
| Brian LaMee | Interested in online only ... | New |
| Cat Francis | Interested in our newer o... | New |
| Cathan Cook | New store opened this y... | New |
| Darren Parker | Likes our products | New |
| David Ahs | Wants some product info... | New |
| Eva Corets | Likes our products | New |

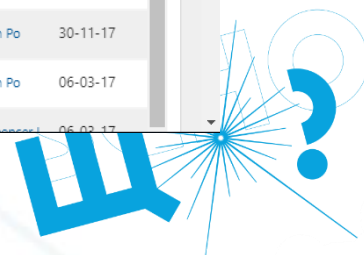
Won Opportunities

| Owner | Sum (Actual Revenue) (€) |
|----------|--------------------------|
| An Po | 33,370,385.00 |
| Molly... | 19,949,376.00 |
| Dan J... | 16,365,000.00 |
| Sven ... | 14,230,000.00 |
| SYSTE... | 13,340,000.00 |
| Spenc... | 9,570,000.00 |
| Amy ... | 7,402,000.00 |

Open Opportunities

| Topic | Account | Owner | Est. Close |
|---|---------------|--------------|------------|
| Expressed interest in A. Datum X line of pri... | Northwind... | An Po | 05-06-17 |
| Audio Equipment | Wide Worl... | Anne Weil | 20-04-17 |
| Interested in our newer offerings | A. Datum | Spencer L... | 09-07-17 |
| Printers | Adventure ... | Christa Gel | 15-07-17 |
| Video Hardware Upgrade | Adventure ... | An Po | 30-11-17 |
| Refrigeration Smart Sensors | Tailspin Toys | An Po | 06-03-17 |

КОНФЕРЕНЦІЯ ДЛЯ ПІДПРИЄМСТВ,
ВІДКРИТИХ ДО НОВИХ МОЖЛИВОСТЕЙ



Dynamics 365 for Sales (CRM)

The screenshot displays the Dynamics 365 for Sales CRM interface for the account 'Tailspin Toys'. The top navigation bar includes 'Dynamics 365', 'Sales Hub', and 'Sales > Accounts > Tailspin Toys'. A secondary toolbar contains actions like '+ New', 'Deactivate', 'Connect', 'Assign', 'Email a Link', 'Delete', 'Refresh', 'Process', 'Share', 'Flow', and 'Word Templates'. The account summary shows an annual revenue of 243,000,000.00 €, 3,500 employees, and owner An Po. The main content area is divided into three sections: 'ACCOUNT INFORMATION', 'Timeline', and 'Relationship Assistant'. The 'ACCOUNT INFORMATION' section is highlighted with a red box and contains the following data:

| ACCOUNT INFORMATION | |
|---------------------|-----------------------------|
| Account Name | Tailspin Toys |
| Phone | 297-555-0192 |
| Fax | +81-3-5555-1360 |
| Website | http://www.tailspintoys.com |
| Parent Account | --- |
| Ticker Symbol | TSPZU |
| Relationship Type | --- |
| Product Price List | --- |

The 'ADDRESS' section below it lists:

| ADDRESS | |
|----------------------------|------------------------------|
| Address 1: Street 1 | Tailspin Grand Central Tower |
| Address 1: Street 2 | --- |
| Address 1: Street 3 | --- |
| Address 1: City | Tokyo |
| Address 1: State/Province | --- |
| Address 1: ZIP/Postal Code | 145-0075 |
| Address 1: Country/Region | Japan |

The 'Timeline' section, highlighted with a blue box, shows a list of events from the last week:

- Task modified by An Po - dimanche 18 novembre 2018 00:39
- Tailspin Toys - Confirm Computer Order
- Phone Call from Veronica Quek (Sample Data) - dimanche 18 novembre 2018 00:39
- Locate Specific Person to speak with
- Opportunity Closed by SYSTEM - dimanche 18 novembre 2018 00:38 (4,910,000.00 €)
- Opportunity Closed by SYSTEM - dimanche 18 novembre 2018 00:38 (5,136,000.00 €)
- Opportunity Closed by An Po - dimanche 18 novembre 2018 00:38 (517,500.00 €)
- Auto-post on Tailspin Toys's wall - dimanche 18 novembre 2018 00:34

The 'Relationship Assistant' section on the right shows the primary contact Marco Tanara with email mtanara@tailspintoys.com and business phone 456-698-4571. Below this, a 'CONTACTS' list shows 'Full Name' and 'Email' columns, with Marco Tanara listed.

Red text 'Основна інформація' is overlaid on the account information section, and blue text 'Історія' is overlaid on the timeline section.



- Home
- Recent
- Pinned
- My Work
- Dashboards
- Activities
- Customers
- Accounts
- Contacts
- Sales
- Leads
- Opportunities
- Competitors
- Collateral
- Quotes
- Orders
- Invoices
- Products
- Sales Literature
- Performance
- Goals
- Service
- Cases

+ New Delete Refresh Quality Process Disqualify Assign Share Email a Link Follow Flow Word Templates

Lead: Lead Alex Wu

Lead Source: Web Rating: Warm Status: New Owner: An Po

Lead to Opportunity Sale... Active for 8 days

Qualify (8 D) Develop Propose Close

Summary Details Related

Contact

Topic: Expressed interest in A. Datum X line of printers

Type: Item based

First Name: Alex

Last Name: Wu

Job Title: Purchasing Manager

Business Phone: 555-123-4879

Mobile Phone: 401-874-2154

Email: alexw@northwindtraders.com

Timeline

Enter a note...

Filter by (Click To Filter)

By record type

All 1 1 Posts

Show more filters

LAST WEEK

Auto-post on Alex Wu's wall - dimanche 18 novembre 2018 00:37

An Po created Alex Wu

Like Reply

Stakeholders

New Connection

| Name | Role |
|---------|-------------|
| Alex Wu | Stakeholder |
| Alex Wu | Stakeholder |

Page 1

Competitors

| Name | Website |
|--------------------|----------------------------------|
| Carter Electronics | http://www.carterelectronics.com |

Company

Company: Northwind Traders

Website: http://www.northwindtraders.com

Street 1: 1 Northwind Trader Way

Street 2: ---

Street 3: ---

City: Columbus

State/Province: OH

ZIP/Postal Code: 47336



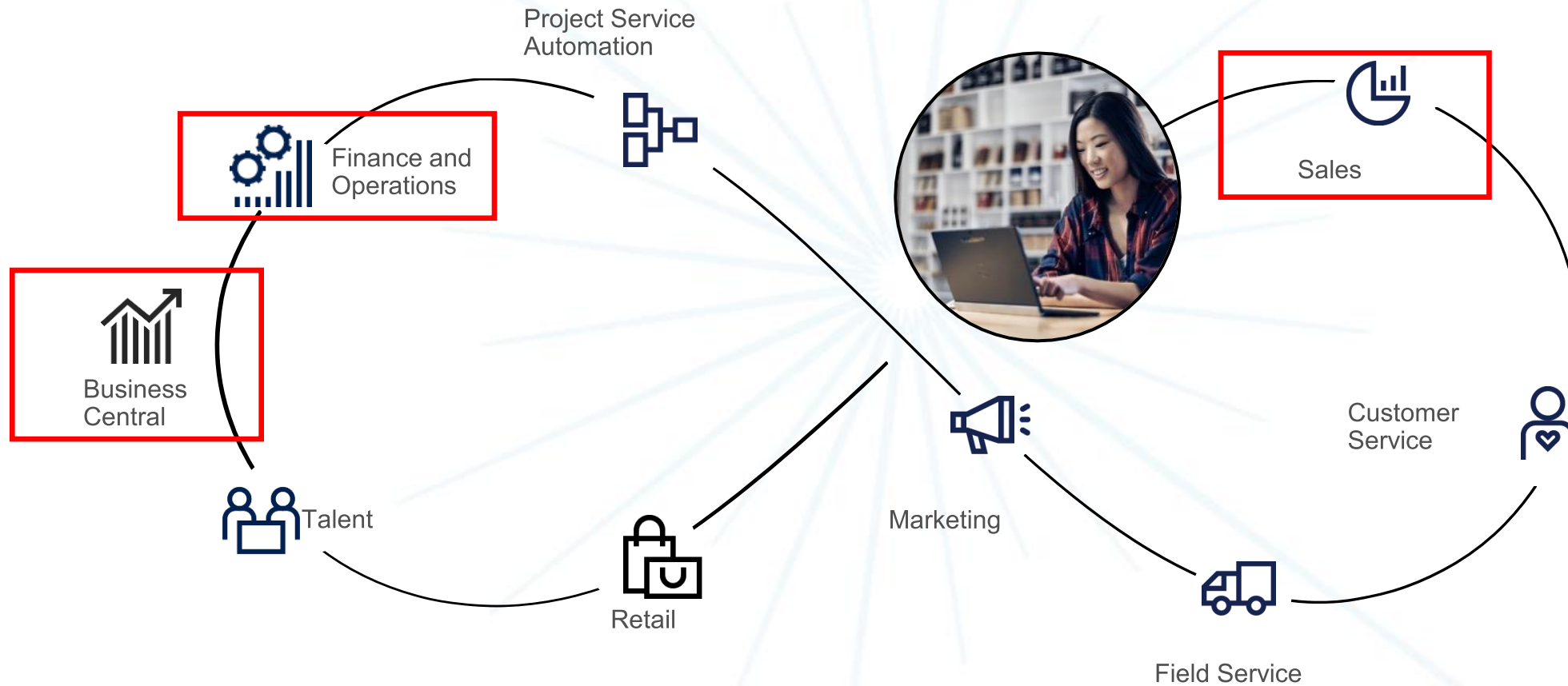
Next Generation User Experience Optimized for Business



Trust, Privacy and the GDPR



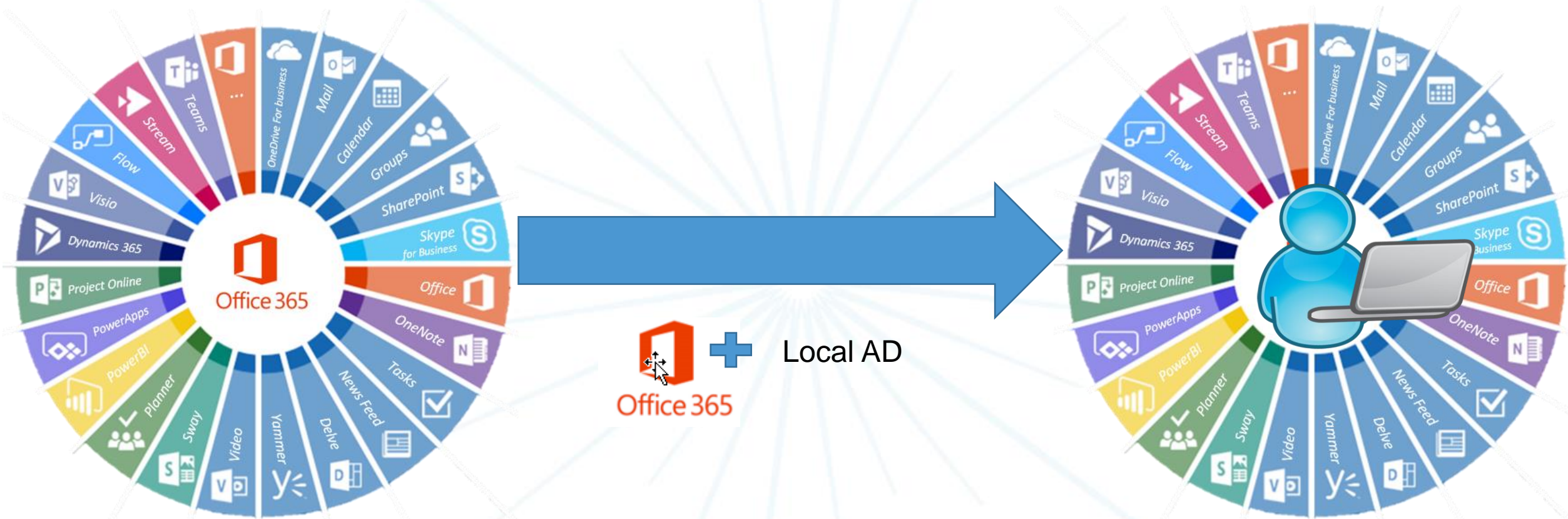
Системи лінійки Dynamics 365



КОНФЕРЕНЦІЯ ДЛЯ ПІДПРИЄМСТВ,
ВІДКРИТИХ ДО НОВИХ МОЖЛИВОСТЕЙ



1 Користувач => 1 Office 365 ОЗ => 1 пароль



КОНФЕРЕНЦІЯ ДЛЯ ПІДПРИЄМСТВ,
ВІДКРИТИХ ДО НОВИХ МОЖЛИВОСТЕЙ



Питання-Відповіді



КОНФЕРЕНЦІЯ ДЛЯ ПІДПРИЄМСТВ,
ВІДКРИТИХ ДО НОВИХ МОЖЛИВОСТЕЙ



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