

SALES FORECASTING DYNAMICS 365

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But first a little bit about us.....

Microsoft
Partner | Silver Cloud Customer Relationship Management
Silver Small and Midmarket Cloud Solutions



About enCloud9

- Dynamics 365 Cloud Customer Relationship Management – Silver 2014 - present
- 15 years experience working with small to mid-sized businesses to modernize sales, marketing, and customer service
- Work with companies throughout the US and Canada
- Primary focus is on Cloud-based Dynamics 365 Customer Engagement Platform
- Premier provider of low-cost fixed fee support services for Dynamics 365, Power Apps, and Power Automate

APRIL 2020 SALES IMPROVEMENTS



Kanban Board allows opportunities to be viewed in a grid-like view and easily moved from stage to stage



Sales Forecasting expands on the built in Goals to allow managers to build more flexible forecasting for sales



Forecasting is not the old goals entity. But you can continue to use Goals!



Forecasts can be based on Sales Territory or Hierarchy (Products coming soon)



Available to users with Sales Professional or Sales Enterprise – not for Team Members



Bottoms up methodology allows greater predictability and ultimately, drives more sales



Salespeople can track performance against their targets

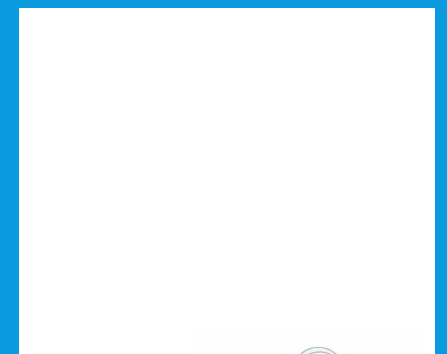
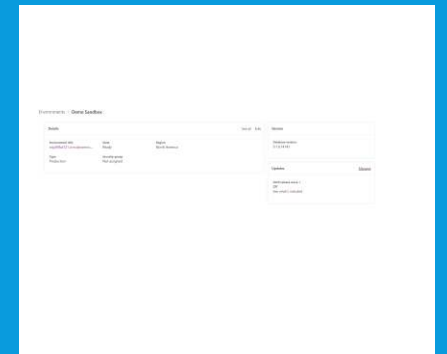
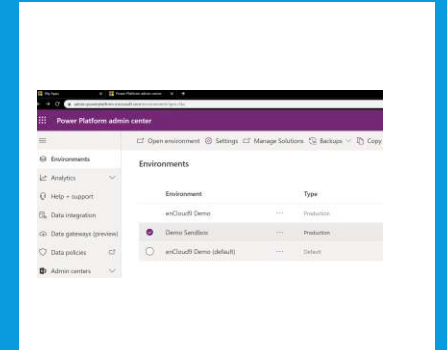


Managers and Directors can measure departmental sales and reallocate resources as needed

SALES FORECASTING HIGHLIGHTS

UPDATE DYNAMICS 365 TODAY

- Visit admin.powerplatform.microsoft.com
- Go to "Environments."
- Select the Environment you wish to update.
- Click on "Manage."
- And then Select "Update Now."
- The process takes about an hour.
- Update is not reversible!!
- You can do this in production if you are willing to take the risk – enCloudg has been using the update for weeks and has only seen a few issues.



Next steps and resources

- Contact us at enCloud9/Dynamics365 support with any questions
- support@encloud9.com
- Sign up for our May 15 webinar – **Sending and receiving SMS messages in Dynamics 365 and PowerApps**

Resources

Microsoft Release Notes

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/project-accurate-revenue-sales-forecasting>

Release notes pdf

<https://go.microsoft.com/fwlink/?linkid=2116924>

enCloud9 Blog Entries

<https://www.encloud9.com/blog/eliminate-the-guesswork-with-sales-forecasting-part-1/>

<https://www.encloud9.com/blog/eliminate-the-guesswork-with-sales-forecasting-part-2/>