Sales Hub App on MS Dynamics CE Platform

SUMMARY

The client's Sales Team and Lead Generation Teams were using different tools to generate leads and enter the details into Excel spreadsheets

The client wanted to streamline the Sales, Marketing, and Customer Success Processes through a Single Platform

PROBLEM STATEMENT

With the expansion of the sales & lead generation team, the Excel spreadsheet was difficult to manage

Difficulty in resource allocation and data visualization

SOLUTIONS

The solution that we developed was the **Power App on the MS Dynamics CE Platform**

Created entities, and fields in **Data verse**

Designed Forms and set a **Business Process Flow** that triggers the specific status of the Process

Integration with LinkedIn Sales Navigator connector to manage the lead generated

Developed Invoice Template and mapped fields with it to track the Invoice history based on the closure of milestone