ENAVATE®

Xcelerate: D365 Sales Packages

	Essentials	Enhanced
Outlook & Calendar Integration	Configuration of Outlook email and calendar synchronization with Dynamics 365	Configuration of Outlook email and calendar synchronization with Dynamics 365
Microsoft Teams Integration	Enablement of collaboration features for sales records in Teams	Enablement of collaboration features for sales records in Teams
Duplicate Detection	Setup of duplicate detection rules for leads, contacts, and accounts	Setup of duplicate detection rules for leads, contacts, and accounts
Activity Tracking	Email, appointment, and note tracking configuration for key sales entities	Email, appointment, and note tracking configuration for key sales entities
User Roles & Security	Assignment of default Dynamics 365 Sales security roles	Assignment of default Dynamics 365 Sales security roles
Mobile Access	Enablement of mobile sales functionality and app access	Enablement of mobile sales functionality and app access
Data Import & Validation	Initial import setup for core sales data (contacts and accounts)	Initial import setup for core sales data (contacts and accounts)
Sales Application Setup	Core setup for lead, contact, and account records	Expanded setup including lead to opportunity objects and product management
Sales Process Configuration	Default Lead to Opportunity conversion	Lead qualification flow, routing rules, and opportunity conversion setup
Product Catalogue	–	Enables out-of-the-box product selection, pricing, and discounting
Quote & Order Enablement	–	End-to-end quote and order process setup including pricing, discounts, and conversion
Document Management	–	SharePoint integration for file storage and access within Dynamics 365
Audit History	–	Organization-level audit configuration for key sales entities
Sales Goal Management	–	Enables of sales goals, KPIs, and performance tracking
Marketing Setup	–	Marketing campaigns and list management configuration
Sales Reporting		Default dashboards and views for sales pipeline and performance