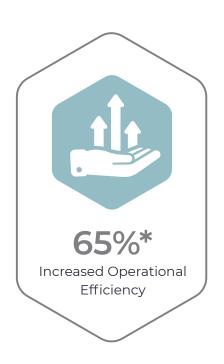# mSales Solution for Dynamics 365 (mSD)

Access Dynamics 365 for Finance and Operations on-the-go

mSD is a standalone mobile sales solution that can be easily integrated with Microsoft Dynamics 365 for Finance and Operations to provide sales teams with real-time access to ERP, to effectively handle various phases of the sales process – lead capture, opportunity management, contact setup, product data access, activity management, quote management, order management, customer cases / complaint resolution, document management, and consignment management, while on-the-go.

Developed to work on multiple platforms such as iOS, Android, and Windows, mSD is a cross-platform app which can be integrated with Dynamics 365 for Finance and Operations to facilitate two-way data synchronization (for instance whenever there is any record created / updated / deleted in Dynamics 365 for Finance and Operations, mSD instantly receives the push notification regarding it; and vice versa). This allows sales teams to gain access to the most current information anywhere, anytime, right at their fingertips, ultimately increasing productivity. With mSD, sales teams can easily respond to and manage customer orders and inquiries efficiently, turning every interaction into a revenue generating opportunity.

75%*
Reduction in Sales
Cycle Time

70%*
Improved Customer
Satisfaction

65%*
Increased Operational
Efficiency

The numbers provided are based on Synoptek's experience while implementing the solution for clients. They may vary as per the business process.

High-level Functionalities

Lead capture and opportunity management

Stay updated on leads and opportunities and accelerate the sales cycle while away from your desk; new leads appear instantly in mSD as they are entered in the Dynamics 365 for Finance and Operations.

Contact setup

Easily create/update contact details and map customers to contact record.

Product data access

Get access to the entire product catalog; provide better demonstration to the customer by giving accurate information.

Quotation management

Add new sales quotes, edit existing, or view other sales quotes, along with status updates.

Order management

Effectively manage sales orders and returns; quickly search a sales/return order by name, account, date posted, and status.

Activity management

Schedule and manage sales activities such as customer visits and sales meetings, directly from mSD.

Document management

Quickly access specific product documents stored in Dynamics 365 from your finger tips.

Customer case / complaint management

Gather all customer cases / complaints into one common help desk system; categorize, assign, and resolve them with ease.

Consignment management

View lists of all the active consignments created; filter them based on the name of the customer, product, type, date, and status.

Reporting and analytics

Review key reports such as total count (leads and opportunities), sales visit, top customers, sales pipeline on opportunity, and more; prioritize actions in order to achieve sales objectives in the most efficient manner.

Offline support

Mnage quotes, orders, customer details, and more, without an internet connection (records submitted during the offline mode are synced automatically when the device is in the online mode).

Key Benefits

- Seamless integration with Dynamics 365 for Finance and Operations
- Informed decision making with real-time access to customer and product data
- Time savings with automation of tasks
- Improved customer service to effectively and quickly resolve customer inquiries
- Increased sales force productivity with the ability to manage tasks on-the-go

About Synoptek

Synoptek is a global systems integrator and managed IT services provider offering comprehensive IT management and consultancy services to organizations worldwide. Founded in 2001; headquartered in Irvine, CA, we have offices and resources across North America and delivery centers in Europe and India.