



**EduTeam**  
A Digital Innovator Company

Presents:




**eGO CRM apps™**

The new CRM *Microsoft technology based*



powered by  
**Microsoft Power Platform**

1



**eGO CRM apps**

The Scenario



**EduTeam**  
A Digital Innovator Company

2



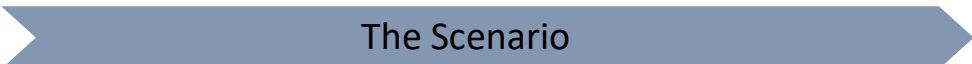

### The Scenario

**There are hundreds of CRM Products and Solutions** that offer a lot of features:

- Commercial CRM solutions from major brands
- Commercial CRM solutions from small brands
- Open Source CRM solutions
- Mixed Open Source / Commercial CRM solutions




3



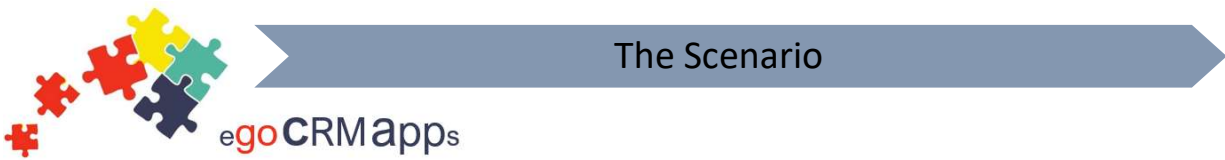
### The Scenario

The most **common scenario** regarding **customers who adopt existing CRM solutions** can be described as follows:

- they have to face a **large investment in Licensing**
- they normally **exploit only 20% / 30% of the features** offered by the existing products (usually known as the «Core CRM», and often modifying them)
- **they carry out software customizations** to add features for the company needs, normally starting some **Implementation Projects**




4



More and more customers would like to **adopt Low-Code / No-Code platforms** (possibly of a **major brand**) for their **Implementation Projects** for the following reasons:

- to make **software projects less expensive**
- to be more agile and ready to face Company changes
- to be ready to **face Innovative Changes** due to **Digital Transformation**




5



**The Solution**

**eGo CRM apps™**  
The New CRM Product  
*Microsoft Technology based!*



6




## The Solution

eGO CRM APPs comes with the following characteristics:

- a **Standard CRM Core**, that includes all those features that are defined as the "**standard features**" of a CRM software
- a **Sustainable Licensing**, highly competitive compared to the competition
- a **solid, flexible and scalable Base Platform**, such as the Low-Code / No-Code **Microsoft Power Platform**



7



## The Solution


eGO CRM APPs is composed by the following commercial modules:

**Omni-comprehensive Licenses**


- eGO CRM APPs - CRM Core
- eGO CRM APPs - CRM Advanced

**Modular Licenses**

- eGO CRM APPs - Marketing Core
- eGO CRM APPs - Marketing Advanced
- eGO CRM APPs - Sales Core
- eGO CRM APPs - Service Core
- eGO CRM APPs - Service Advanced




8



**The Solution**

**Some of the eGO CRM APPs numbers** (continually increasing):

- **About one YEAR** of a multi-disciplinary teamwork
- **More than 45 Tables** with several hundred **Fields** and **more than 70 relationships** between tables
- **About 100 forms** (*insert / edit cards*) and **hundreds of configurations** on the forms (*read-only and hidden fields, tabs, sections, related subgrids, calculated fields, roll-up fields, various controls*)
- **About 130 Views** (*lists, with hundreds of configurations of columns, queries and sort criteria*)
- **About 70 Workflow**
- **80 Web Resource** of **Image** type
- **About 30 Business Rules**
- **About 10 Web Resource of type Javascript**, with about **50 functions**
- **About 10 Plug-In Steps**
- More than 5 Cloud Flows
- More than 4 email Templates
- **More than 40 Choices (Options Set)**
- 2 Dashboard



9

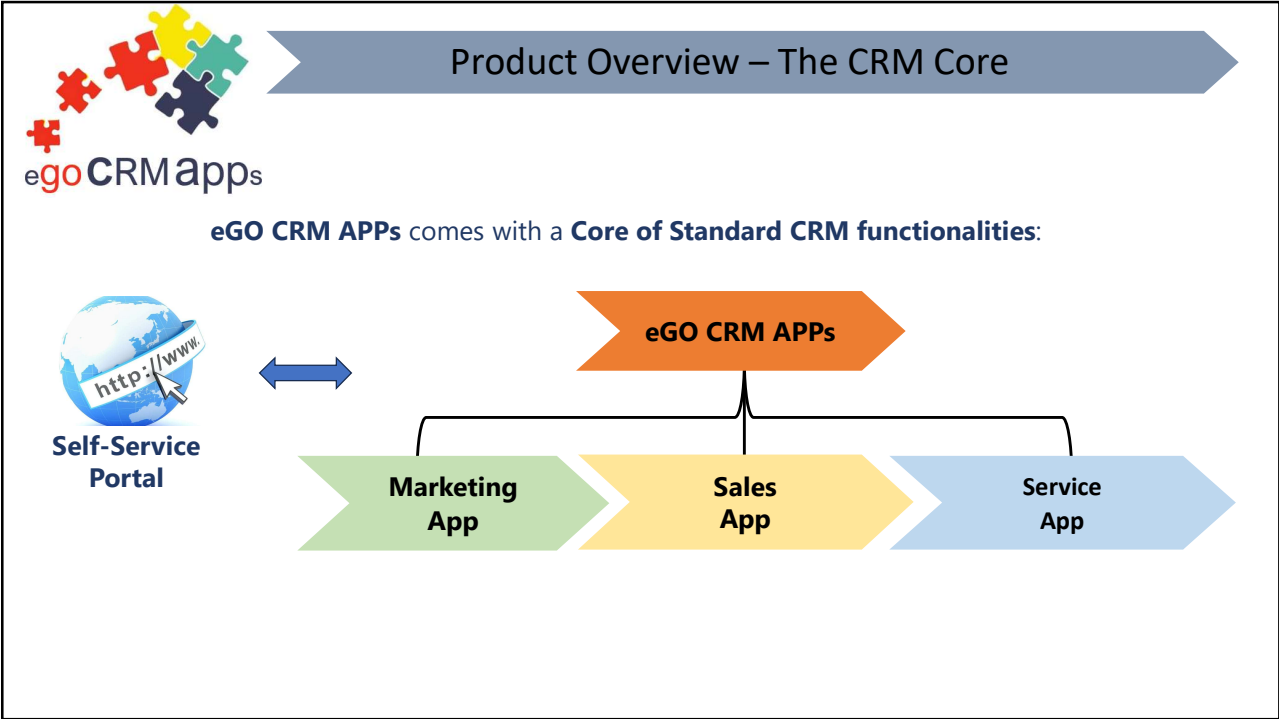


A Digital Innovator Company



**Product Overview**

10



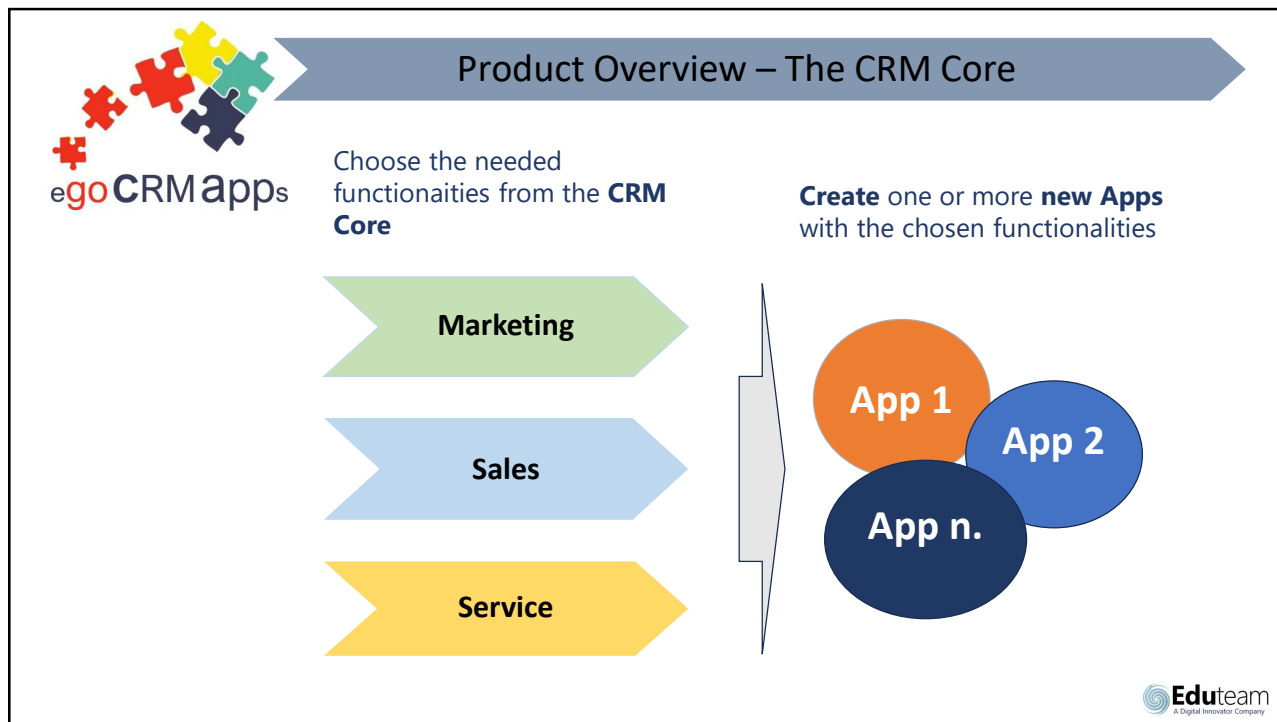
11

The diagram is titled "Product Overview – The CRM Core" and features the eGO CRM apps logo. It lists the following features of eGO CRM APPs:

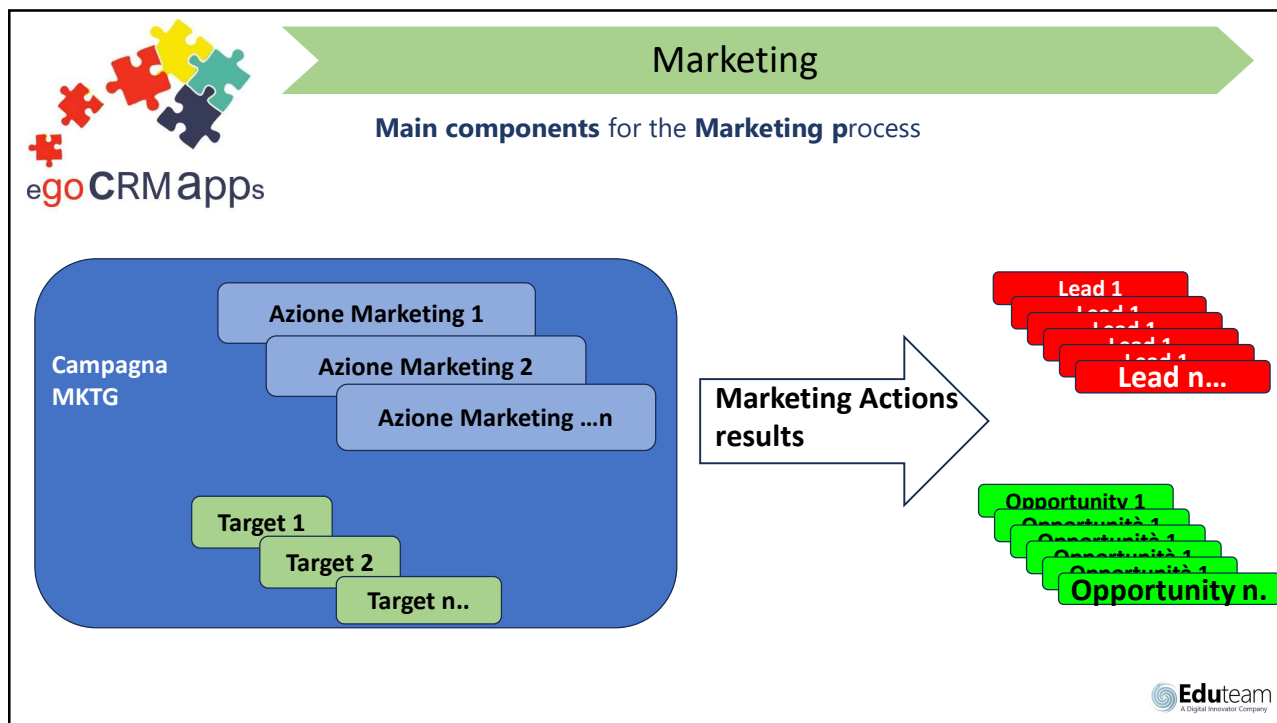
- Is **ready to use** with his **out of the box functionalities**
- **Let you to create to create new apps with only the functionalities you need**
- Let you to create **new functionalities** or **modify the existing**, thanks to the power and flexibility of the **Microsoft Power Platform**

The EduTeam logo is located in the bottom right corner.

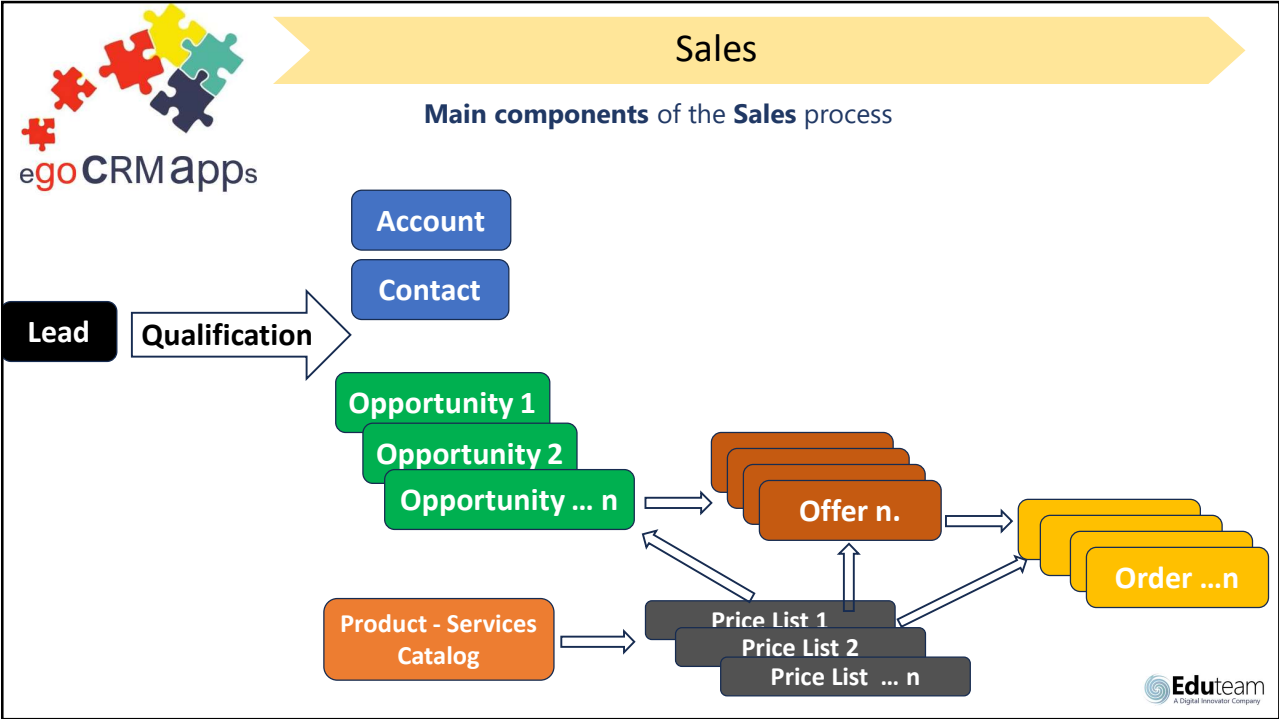
12



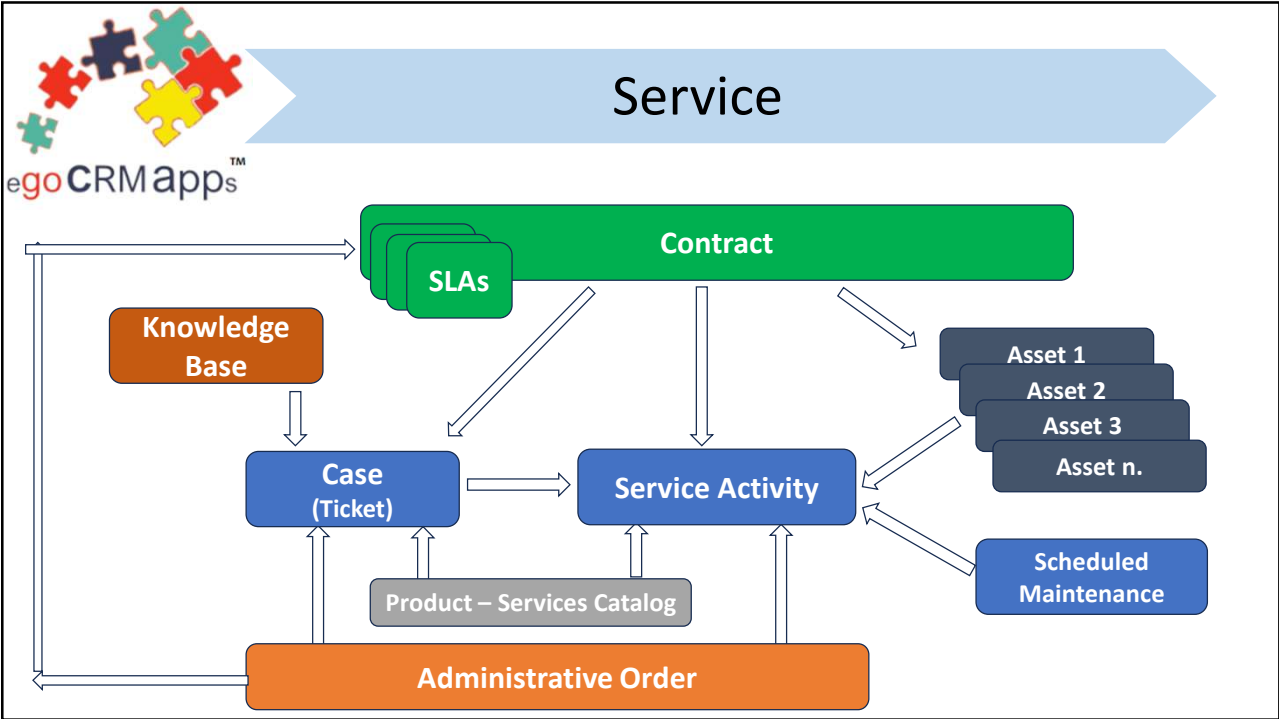
13



14

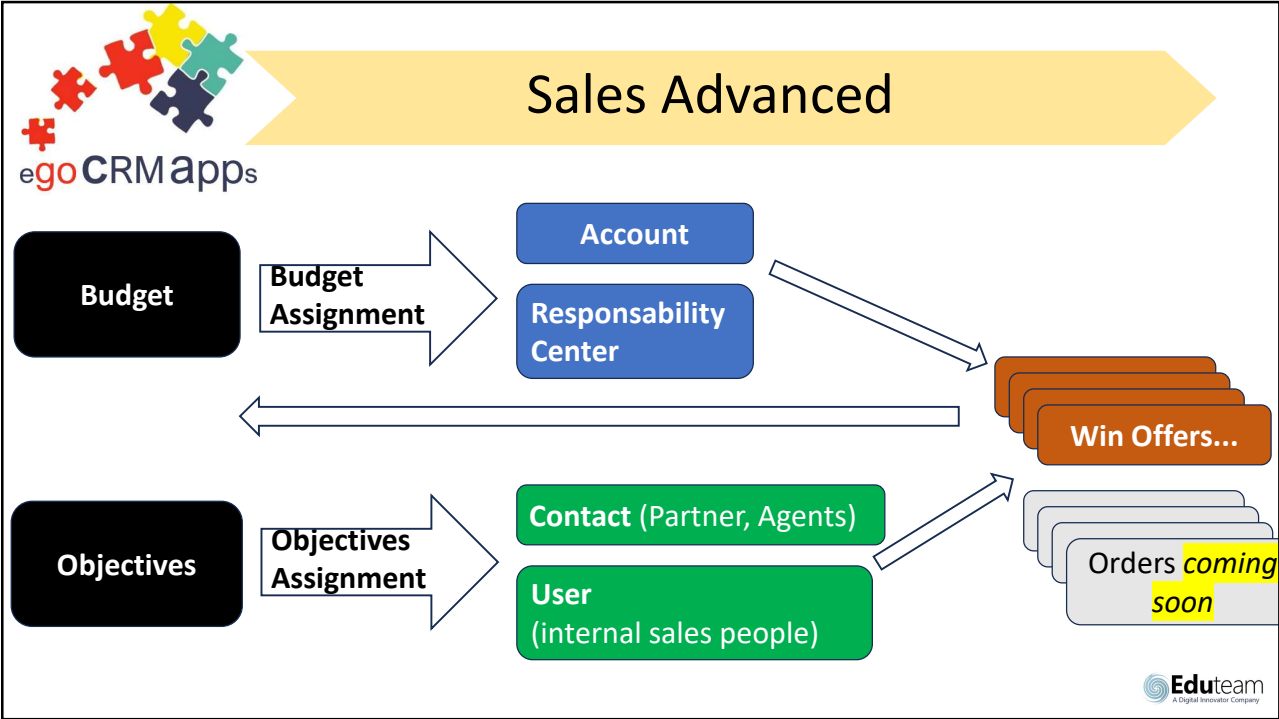


15



16






17

The slide features the "Eduteam A Digital Innovator Company" logo in the top left corner. In the center is the "ego CRM apps" logo with colorful puzzle pieces. Below the logo is a light blue horizontal bar with the text "Base Functionalities".


18




## Base Functionalities

**eGO CRM APPs** uses a series of standard Microsoft Dataverse tables which can be used by all CRM components:

- **Account** (Customers/ Prospects, Partners, Agents)
- **Contacts** (people)
- **Activities** (email, appointments, tasks, phone calls)
- **Utenti**
- **Notes** (+ attachments)
- **Queues**




19



## Base Functionalities

- **Product – Services catalog**, organized in 3 levels:
  - Families*
    - ↳ *Categories*
      - ↳ *Products-Services*





20




Core Marketing Functionalities


21




- **Market Target;** static or dynamic lists of Contacts (people) used in Marketing Actions and Marketing Campaigns
- **Marketing Actions;** allow you to manage structured operations / activities, and carry out mass distribution of various kinds towards the associated Targets (for example, sending mass emails or other channels);. Includes a Cost / Revenue management




22




**Marketing**

 **egoCRM apps**

**Campagne Marketing**, for the management of Marketing Campaigns and Events. They allow you to group together multiple Marketing Actions and multiple Marketing Targets. Includes a base Cost / Revenue management



23




**Eduteam**  
A Digital Innovator Company



**egoCRM apps™**

Advanced Marketing functionalities


24



## Advanced Marketing

eGO CRM apps

- **External Targets**, based on external lists (such as Azure Storage type, Excel sheets stored in the cloud or in On-Premise repositories; they are therefore an economical and efficient means to manage large quantities of data (they do not use the Dataverse) for the Lead Generation process (*coming soon*)
- **Multi-Channel Marketing Actions** are an extension of the Marketing Actions; they allow for massive activities distribution to associated Targets (including external Market Targets) using additional channels, such as (*coming soon*):
  - *email via external service*
  - *sms via external service*
  - *social channels (WhatsApp, Facebook, Instagram, LinkedIn, Google ADS)*



25



## Core Marketing / Sales cross Functionalities

26



**egoCRM apps**

**Marketing** → **Sales**

**Leads**

- **Lead are expressions of interest** not yet well defined, by someone not yet well identified, towards the company's products / services
- **Leads can be the result of Marketing Actions / Campaigns**, or come from other channels (e.g. the company website)
- **Leads can be the first step in a Sales process**




27



**egoCRM apps™**


**Sales Core Functionalities**

28




## Sales

- **Price Lists;** Price Lists may be based on the Product - Service Catalog but can have also some ad hoc Price List Items; they are mainly used in Opportunities and Offers
- **Sales Opportunities;** represent the well-defined interest of an existing customer or a potential new customer (prospect). They includes the products and / or services for which the customer may be interested, the related competitors and stakeholders, and all the information and activities related to the Opportunity



29




## Sales

### Offers / Quotes

**Sales Offers / Quotes;** represent the formal quotations that are presented to the Customers; they includes the products and/or services quoted; the Offers can be revised and linked to Opportunities.

Furthermore :

- **Dashboard di Vendita**
- **Ordini**
- **Fatture**





30




Advanced Sales Functionalities

31





## Sales Advanced

- **Sales Budget Management;** Sales Budgets can be defined for the company, for the companies' group and / or for Responsibility Centers of the company; the progress respect the defined Budgets can be tracked
- **Sales Objectives / Targets Management;** personal sales goals / targets can be assigned to sales representative, agent or partner in the company. Progress against the assigned targets can be tracked





32





Service Functionalities


33




## Service

### Cases

- **Cases** are used for the management of cases, requests, practices, complaints and the like
- **Service Activities** are used for the management of Assistance Interventions and more generally for **the management of the Services and / or Field Service** provided by the company
- **Contracts are used for formalize the services** provided to the customers. They can manage the maximum number of included cases, the number of included service hours and the Service Level Agreements (SLA)




34




## Service

### Service Level Agreements (SLA)

- **Service Level Agreements (SLA)** are related to Case Management, and allow to define the expected times for **Taking in Charge** and for the **Times for Resolution** of the Case. The SLAs must be associated to Contracts in order to be applied to Customers
- **Asset** represent products, machinery, equipment and various devices owned by Customers; they may be included in Contracts and can be the related to the Service Activities




35



## Service

- The **Knowledge Base** represents a collection of classified information (including suggestions from **ChatGPT4**) that can be used to help solve Cases
- **Administrative Orders** are used for the administrative classification (useful for the **reporting and invoicing of the worked hours**) of the services provided



36





Self-Service Portals



Power Pages


37



Self-Service Portal

**Self-Service Portal**

- The **eGO CRM APPs** come with **Self Service Portals** for external users, who can insert by themselves **Leads** (coming soon) and **Cases**
- Using the Self-Service portals, the «**Reported By**» information are **automatically populated** with the data of the authenticated portal user
- Self-Service portals are made on **Microsoft Power Pages**





38




Based on Microsoft Technology

39




Microsoft Tecnology




Microsoft Power Platform

and in particulary on:




**Power Apps**  
Model -Driven  
For the CRM APPs




**Power Automate**  
For automation / integrations of:

- extra Dataverse data sources)
- complex Dataverse automation



**Dataverse**  
As primary data Service for  
all the MS components




40




**Microsoft Technology**

eGO CRM Apps

eGO CRM APPs take full advantage of the native integration with **Microsoft 365:**




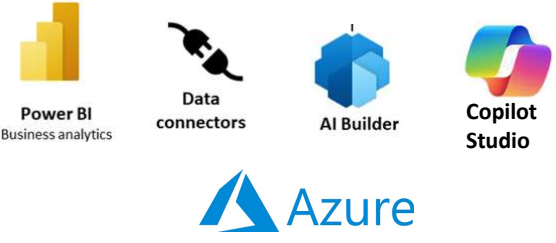
41



**Microsoft Technology**

eGO CRM Apps

eGO CRM APPs take full advantage of the other major components of Microsoft technology:



42



**Microsoft Tecnology**

eGO CRM Apps

**eGO CRM APPs** use all the functionalities offered by the **Microsoft Dataverse** and the **Power Apps - Model Driven**:

- Low code / No Code platform
- Based on the Microsoft Cloud
- Workflow and Business Rules
- Ready for Multi-Language support (*Italian and English available at the moment*)



43



**Microsoft Tecnology**


eGO CRM Apps

Others **Microsoft Dataverse** and the **Power Apps - Model Driven**:


- Functionalities for the creation of basic Reports and Dashboards
- Security Roles management
- Data Assignment and Sharing
- Data Import ed export from / to Microsoft Excel



44




Microsoft Technology



egoCRM apps

Others **Microsoft Dataverse** and the **Power Apps - Model Driven**:

- Word and Excel templates management
- Native Sharepoint integration for Document Management
- Native Microsoft Outlook / Microsoft Exchange integration
- Ready for integration with other systems via API



EduTeam  
A Digital Innovator Company

45



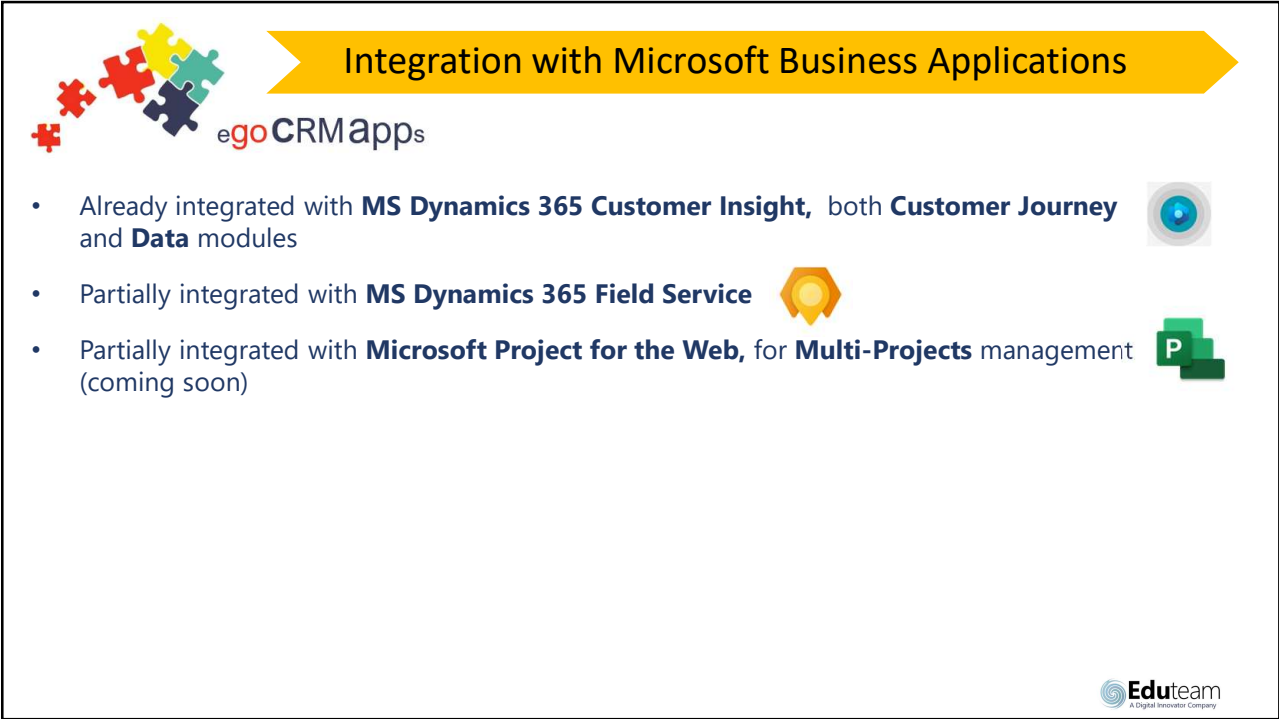
EduTeam  
A Digital Innovator Company




egoCRM apps™




Integration with Microsoft Business Applications


46



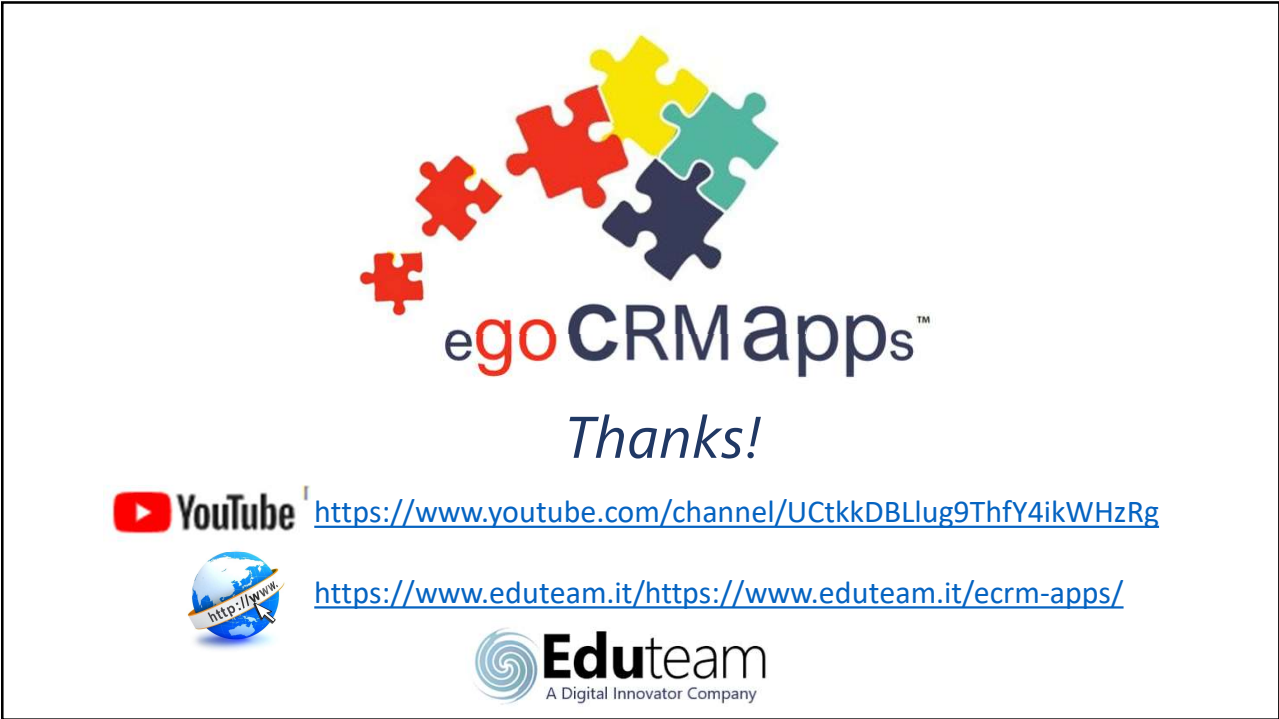
**Integration with Microsoft Business Applications**


 egoCRM apps

- Already integrated with **MS Dynamics 365 Customer Insight**, both **Customer Journey** and **Data** modules 
- Partially integrated with **MS Dynamics 365 Field Service** 
- Partially integrated with **Microsoft Project for the Web**, for **Multi-Projects** management (coming soon) 


 Eduteam  
A Digital Innovator Company


47




 egoCRM apps™

*Thanks!*

 **YouTube** | <https://www.youtube.com/channel/UCtkkDBLlug9ThfY4ikWHzRg>

 <https://www.eduteam.it/https://www.eduteam.it/ecrm-apps/>

 Eduteam  
A Digital Innovator Company

48