



# APPS



## Brochure



Visualization & Automation Apps  
Dynamics 365 CRM and Dataverse

Innovative. Logical. Impactful.



# Redefine Productivity within Dynamics 365 CRM with Our Innovative Apps on Microsoft AppSource

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# Geo-locational App



Certified location-based  
geo-mapping & analytical application  
for Dynamics 365



## Customer Reviews



Must to have app. Maplytics provides location insights for Dynamics 365 data and empowers our users on their day to day activities. Great customer service, we are always pleased with the level of support we receive from Maplytics team.

*Ivaylo Miroleskov*



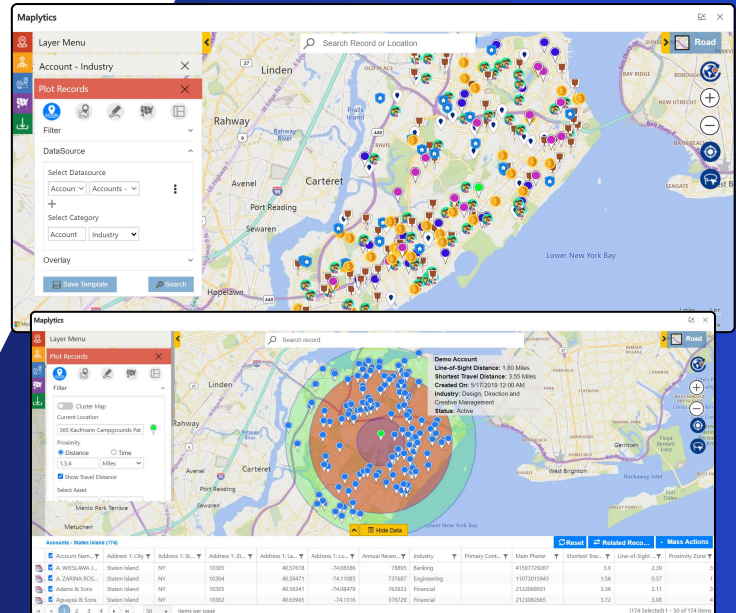
This product is very powerful and performant. We are able to see your project, our portfolio worldwide. Maplytics team is perfect, they always help us, they provide us a prompt response. I recommend this product.

*Amandine Laurent*





Maplytics™ (Certified Software on Microsoft AppSource) is a geo-analytical mapping app for geospatial visualization, optimized routing, and location analytics. It provides seamless integration between Bing/Azure Maps and Dynamics 365, empowering organizations to plot, plan, visualize, and analyze Dynamics 365 data on maps using the API services of Bing/Azure Maps. Maplytics also provides support in Canvas App for enhanced mobility and ease for field reps.



## Radius/ Proximity Search

Enable users to plot client records within a specific proximity in terms of distance or time on a map.



## Auto Scheduling

Stay productive by scheduling appointments automatically for multiple users over multiple days.



## Route Optimization

Improve field productivity and deliver quality services to clients efficiently with optimized routing.

## More Features



**Territory Management:** Auto-create & align multiple balanced sales territories while saving progress as a draft to rework anytime.



**Real-Time Tracking:** Track the live location of Sales & Service Reps, and other resources on a map in real-time.



**Analytical Dashboard:** Gain historical, current, and predictive data to analyze & plan strategies for optimized profits.



**Heat Map Analysis:** Create intuitive Pie charts and Column charts using Heat map color codes.

## Benefits

Advanced Data Visualization

Reduced Time & Fuel Consumption

Improved Locational Awareness

Targeted Locational Marketing



www.inogic.com



crm@inogic.com



# File & Storage Management Apps



## Attach2Dynamics

Manage and Store Dynamics 365 CRM Attachments on SharePoint, Dropbox and Azure Blob Storage



## SharePoint Security Sync

Enhanced Security and Document Management for Dynamics 365 CRM with SharePoint Security Sync

## Customer Reviews



Just want to say a massive thank you to the team at Inogic for accommodating our requirements into their product in record time. [...] fantastic experience and refreshing to see a solution provider be as open and responsive as they were. Highly recommend 10/10.

*Gerhard Pretorius*



Great Product and Fast Support! SharePoint Security Sync proved to be a great tool for permission synchronization, combining ease of configuration and usability. The fast-responding support helped us when the issue occurred.

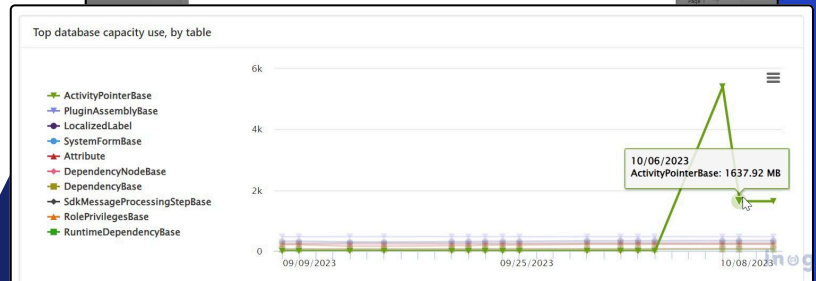
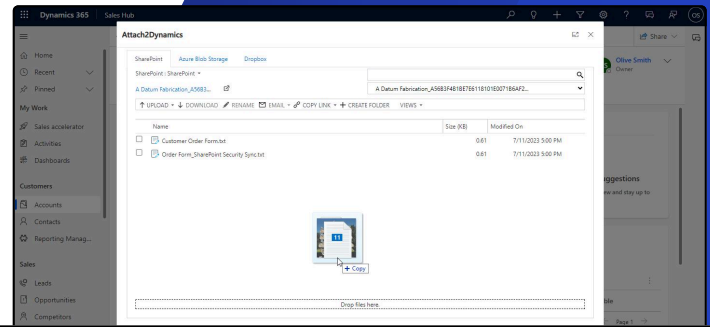
*Sergiy Demchuk*





## Attach2Dynamics

Attach2Dynamics is a document management app for Dynamics 365 CRM/Dataverse that integrates with external cloud storage solutions like SharePoint, Dropbox, and Azure Blob. It moves CRM attachments, notes, and files to your chosen cloud storage in real time. With Attach2Dynamics, you can manage cloud-stored files and folders directly within the Dynamics 365 CRM environment.



### Save Dynamics 365 Storage Space

Attach2Dynamics gives you the provision to natively integrate your Dynamics 365 CRM with multiple inexpensive file storage platforms viz SharePoint, Dropbox, and Azure Blob Storage.



### Real-time Email Body & Attachments Migration

Almost 70% of Dynamics 365 CRM storage is consumed because of email content and attachments. With Attach2Dynamics, move them to your preferred document management system in real-time without hampering accessibility.



### Access and Manage all Documents from CRM

Easily access, upload, download, rename, share, and delete files directly within the Dynamics 365 interface. Get drag-and-drop capabilities, file-sharing capabilities, and more with just a click!

## More Features



Perform all the actions in the context of a logged-in user with single sign-on.



Drag and Drop Email and its Attachments from Outlook to cloud storage.



Deep search capabilities for files stored in cloud storage right from your CRM.



Bulk migrate history Notes / Email / Sales Literature attachments to cloud storages.

## Benefits

Save Storage Space

Secure Backup of CRM Documents

Controlled Access to User Actions

Bulk Improved Document Management



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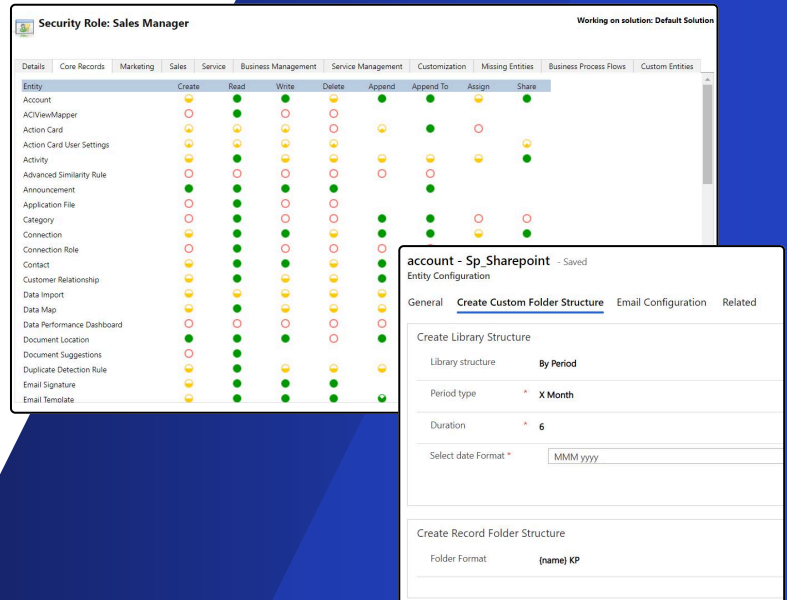


[crm@inogic.com](mailto:crm@inogic.com)



## SharePoint Security Sync

SharePoint Security Sync is a comprehensive tool that replicates the Microsoft Dynamics 365 CRM security model to SharePoint. While Dynamics 365 CRM offers native SharePoint integration, SharePoint Security Sync enhances this integration by ensuring seamless security synchronization between the two systems. This solution not only associates document folders with CRM records but also syncs security privileges from Dynamics 365 CRM to SharePoint, guaranteeing secure and reliable access to confidential documents.



### Auto Sync CRM Privileges in SharePoint

Automatically synchronize Dynamics 365 CRM security privileges with SharePoint to ensure consistent user access and secure document management across both platforms.



### Customizable Folder Management for SharePoint

Customizable folder management and subfolder structure in SharePoint allows for automated, tailored folder creation and effortless duplication of existing folder structures, overcoming the native 5000-file library limits.



### Metadata Filters and Custom Columns

Enhanced metadata features in SharePoint allows users to customize document organization with custom columns for diverse information types.

## More Features



Sync file access privileges in real-time by user, business unit, or organization, ensuring secure & accurate document visibility during migration.



Control access to actions like Upload, Download, and Email security templates.



The app lets users build SharePoint folder structures using workflows through the 'Auto Create Folder' field.



Bulk Migration Job allows users to sync previous CRM records in bulk with SharePoint.

## Benefits

Seamless Document Management

Automatic Syncing of Access Rights

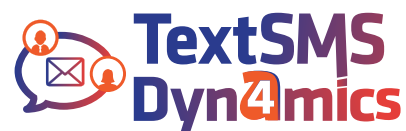
Automate Library Creation

Secure Critical Communication

# Omnichannel Apps



Integrate WhatsApp into Dynamics 365 CRM for Efficient Communication



Enable advanced Text SMS communication features within Dynamics 365 CRM



Connect, Track, and Convert your website visitors by integrating Live Chat and Dynamics 365 CRM

## Customer Reviews



**THE BEST.**  
The solution is quite intuitive, adapts to all the needs of organizations, the support is fast and effective. Reliable and affordable.

*Isaias Núñez*



[...] This solution has become a one-stop shop for our needs, making managing our alumni connection on WhatsApp immensely easy. It has turned around our response time. We are more efficient and quick because of this solution. The support team is fast and effective, assisting within 24 hours whenever needed.

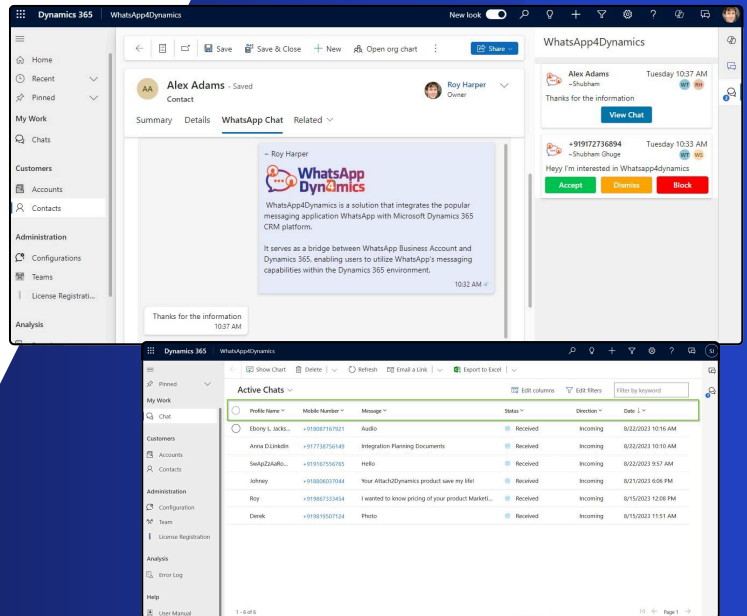
*IIT Gandhinagar*







WhatsApp4Dynamics is a cutting-edge solution that integrates WhatsApp with Microsoft Dynamics 365 CRM. This app lets you send and receive WhatsApp messages directly within Dynamics 365, merging CRM data with WhatsApp Business for context-rich interactions that enhance customer connections. Step up your game and expand your customer reach with short, impactful messages—ditch the long emails and embrace the future of communication with WhatsApp4Dynamics!



## WhatsApp Conversation Manager in CRM

WhatsApp4Dynamics integrates WhatsApp Business Account with Microsoft Dynamics 365 CRM, enabling direct customer communication within CRM. This integration eliminates the need to switch between different systems, streamlining your workflow.



## Prompt WhatsApp Message Alerts in CRM

Receive real-time WhatsApp notifications in Dynamics 365 to boost your responsiveness and efficiency. This feature ensures you stay informed and can quickly address customer inquiries and important messages.



## Track Communication with Historical Chat Sessions

WhatsApp4Dynamics allows you to store chat history within CRM chat sessions. Communicate with customers via WhatsApp, keeping a complete record of conversations linked to each CRM record for easy tracking and review.

## More Features



Map CRM records to WhatsApp chats using mobile numbers for personalized interactions.



Send text, media, quick replies, and more with customizable message templates.



Automate message delivery for events like order confirmations and reminders.



Offers an intuitive chat interface in CRM and file compatibility.

## Benefits

Personalized Client Outreach

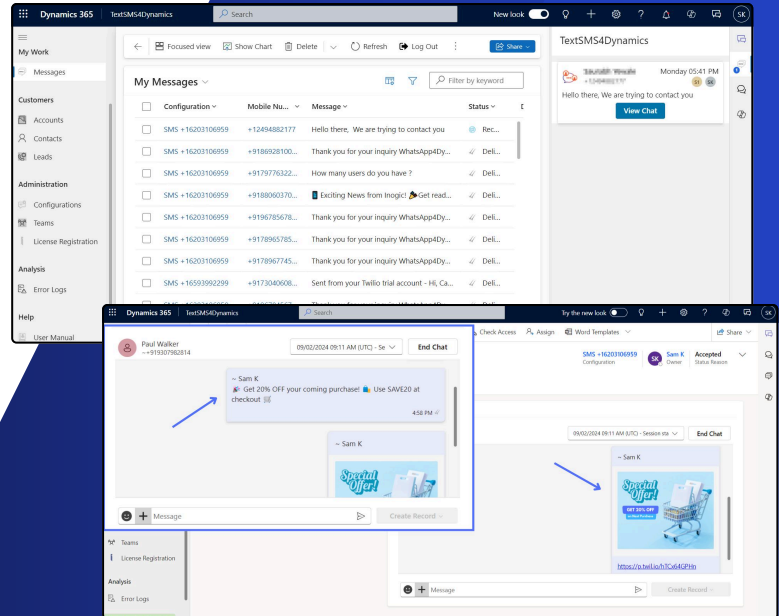
Multilingual Customer Engagement

Enhanced Engagement Monitoring

Optimized Customer Support



TextSMS4Dynamics is your bridge to better customer relationships. This innovative tool seamlessly integrates SMS messaging into Microsoft Dynamics 365 CRM, empowering businesses to connect with customers effortlessly. Enjoy the convenience of managing conversations, automating messages based on customer interactions, and creating detailed customer records – all within a single platform. Experience the power of real-time communication, increased engagement, and streamlined operations with TextSMS4Dynamics.



## SMS Integration for Seamless Communication

Send and receive SMS messages directly from your CRM platform, eliminating the need for switching between applications. This improves efficiency and reduce manual tasks by consolidating communication channels.



## SMS Notification Alerts

Receive SMS notifications in a dedicated section within Dynamics 365 for easy visibility and quick action. This allows CRM users to stay informed about customer inquiries and important messages, allowing for timely responses and improved customer satisfaction.



## Rich Text Messaging for Engaging Conversations

Enhance customer engagement by including images and emojis in your SMS messages. Create more engaging and memorable conversations by adding visual context and making the messaging livelier.

## More Features



Send automated SMS messages for events like order confirmations and reminders.



Maintain a record of all SMS conversations linked to CRM records for easy tracking and review.



Map conversations using mobile numbers, allowing for tailored and relevant communication.



Create custom CRM records tailored to your business and assign them to conversations— without leaving the chat.

## Benefits

Improved Customer Satisfaction

Enhanced Customer Experience

Faster Response Times

Global Reach



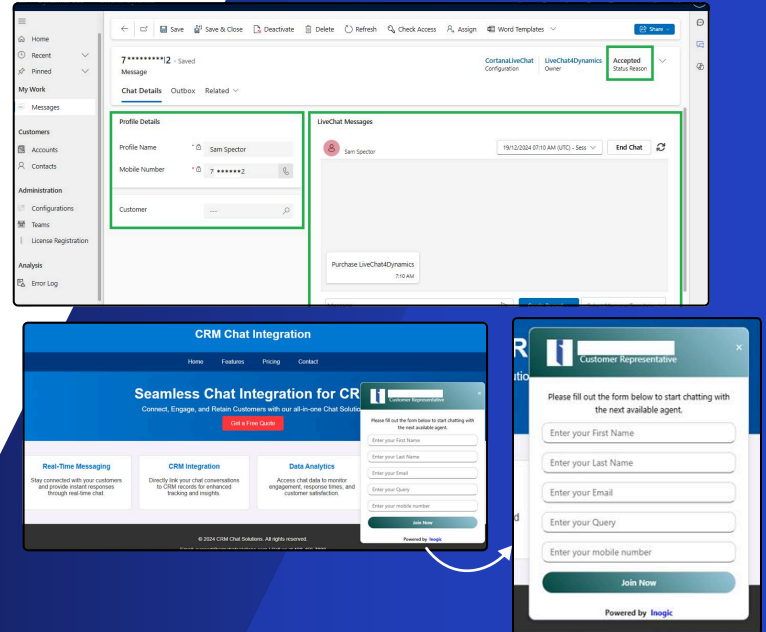
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crm@inogic.com



LiveChat4Dynamics is an effective app for leveraging Live Chat of website visitors for effective prospecting, lead nurturing, and maximizing profit margins within Dynamics 365 CRM. This integration eliminates the need to toggle between interfaces, ensuring immediate notifications, swift responses, and instant engagement with prospects. The result is enhanced website visitor management, personalized interactions, and ultimately increased sales and profitability.



### Quick Website Visitor Engagement

Connect with website visitors instantly through live chat to enhance their experience and drive engagement.



### Instant CRM Notifications

Stay on top of every live chat with instant notifications directly within Dynamics 365 CRM, enabling timely and effective customer responses.



### Integrated Conversation Tracking & History Storage

Manage and track all live chat interactions within Dynamics 365 CRM, with chat history stored in dedicated sessions for easy reference and improved customer management.

## More Features



Access all customer data, including chat interactions, in a single view for a 360-degree overview.



Allow to create CRM records based on interactions with visitors during live chat sessions.



Provide real-time customer service for immediate assistance.



Efficiently manage customer interactions with the Message Conversation Manager.

## Benefits

Centralized Instant Communication

Enhanced Customer Engagement and Experience

Streamlined Sales and Support Processes

Increases Operational Efficiency



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[crm@inogic.com](mailto:crm@inogic.com)

# Data Quality Apps



Bulk Detect and Merge Duplicate Dynamics 365 CRM Data with DeDupeD



Undo and Restore Dynamics 365 CRM data in a single Click

## Customer Reviews



I recently used Inogic's dedupeD for duplicate management, and the experience was outstanding. [...] significantly improving our data quality. I highly recommend dedupeD for any organization seeking a reliable and customizable duplicate management solution. Great job, Inogic!

*Ashwiny Ashok*



Brilliant App, saves lot of time (Recommended). This is a wonderful app helps to retrieve accidental deleted records, and columns data. Maintains history of all changes made (excellent feature). App is very easy to install, cheap and can start using it in no time.

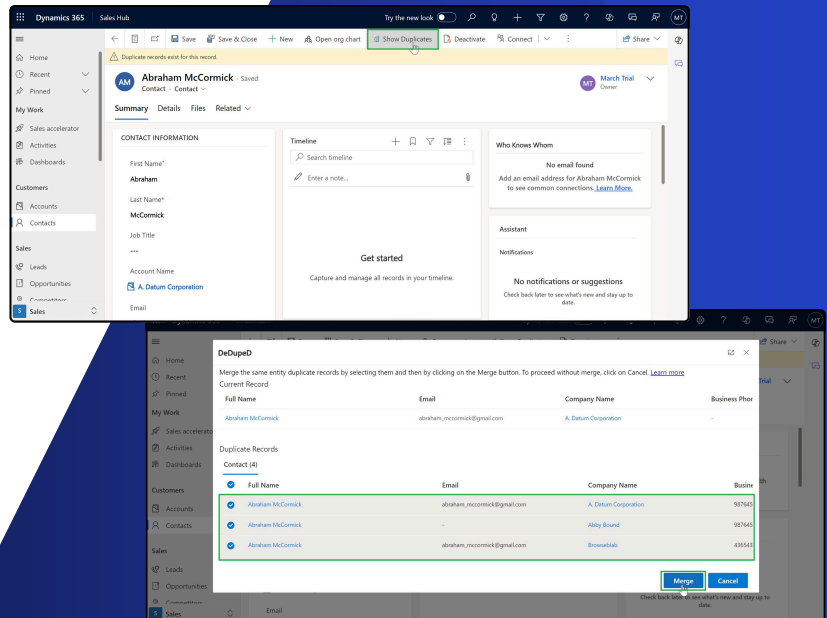
*Ram Sama*







DeDupeD is Inogic's data hygiene app for Dynamics 365 CRM, designed to detect, prevent, and merge duplicates across all entities, including custom ones. It helps businesses eliminate redundant data for a cleaner database, enhancing decision-making and providing clearer insights into sales.



## Detect Duplicates

DeDupeD streamlines duplicate data management in Dynamics 365 by identifying duplicates, automating detection jobs, and providing a "Show Duplicates" button on the record form for real-time control and ongoing data accuracy.



## Prevent Duplicates

DeDupeD allows users to take preventive measures to minimize the occurrence of duplicates. The app lets you prevent duplicate records on both the client side and the server side. It offers configurable rules that help reduce the likelihood of duplicate entries.



## Merge Duplicates

Merge identified duplicates directly from individual records by selecting a master record to retain desired information and prevent inconsistencies. Additionally, DeDupeD allows bulk merging of historical duplicates in CRM.

## More Features



Automate the merging of duplicate records generated on the server side.



Define specific rules for merging address fields, ensuring that critical location information is retained.



Detect duplicates based on phonetics, ensuring no similar-sounding records are left.



Whitelist specific records from future duplicate checks to maintain data accuracy.

## Benefits

Automates Duplicate Detection

Reduces Storage Costs

Single Customer View

Improves Data Quality



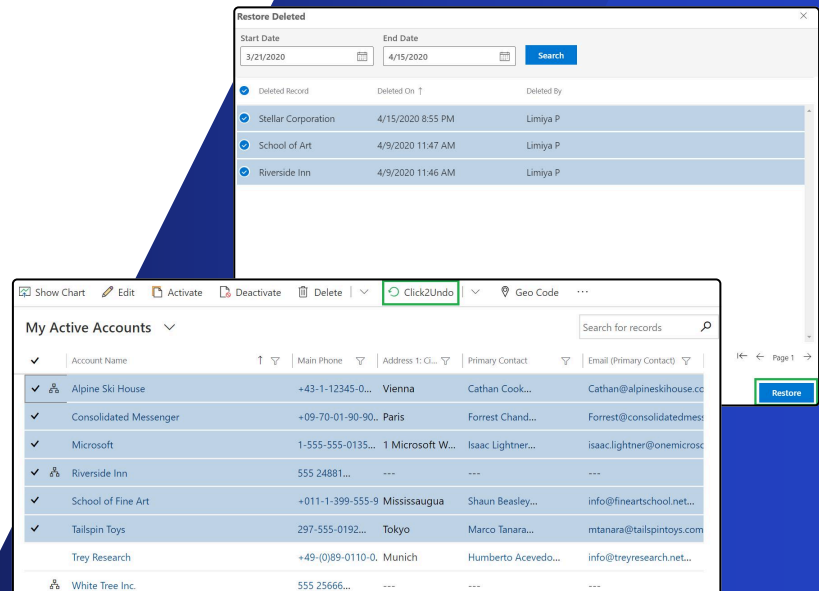
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crm@inogic.com

# Undo2Restore

Undo2Restore is a one-click productivity app for Dynamics 365 CRM and Dataverse that simplifies record recovery. Instantly revert any record to its previous state, whether you're undoing recent changes or restoring historical data. Supporting both out-of-the-box and custom entities with auditing enabled, Undo2Restore acts as your personal 'Ctrl+Z' button, ensuring seamless data restoration with minimal effort. Experience effortless data recovery and enhance your CRM efficiency with this powerful app.



## Restore Deleted Records

Restore individual or multiple records easily using a user-friendly grid, with search and filter options to find and recover your data swiftly.



## Undo Past Changes

Ability to undo past changes made to multiple fields in Dynamics 365 CRM records in one go using History button.



## Undo & Restore in Bulk

Effortlessly undo recent changes and restore records to their previous state, simplifying data correction in CRM. Bulk-restore multiple records at once, ensuring quick and hassle-free data management.

## More Features



Undo and restore records for both out-of-the-box and custom entities.



Recover activities linked to deleted records.



Restore records to their original status at the time of deletion, preserving all relevant details.



Automatically restore related header line records, including associated products.

## Benefits

Save Time with Bulk Restoration

Reliable Data Recovery

Easy Error Correction

Protect CRM Integrity

# Visualization Apps



## Kanban Board

Visualize and interact with Dynamics 365 data in Kanban View for streamlined operations



## Map My Relationships

Unlock Data Insights with 360-degree Views and Multi-Level Relationship Exploration in Dynamics 365



## Business Process Checklist

Build Consistent Sales Processes in CRM with Automated Playbooks

## Customer Reviews



A very good addition to out of the box functionality. [...] offers a visual drag-and-drop interface that allows users to easily organize opportunities through different stages. We picked this add-on mainly because it is way more customizable than Microsofts out of the box Kanban view.

*Fabian Ster*



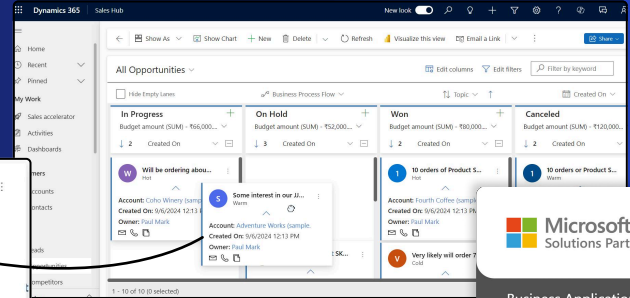
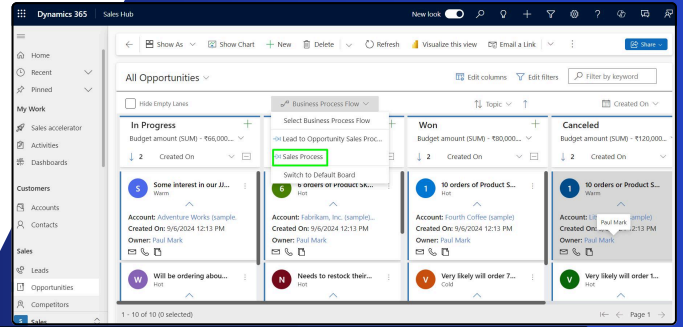
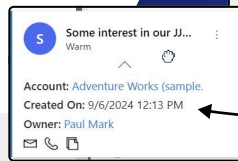
[...] Easy to configure with excellent customer support. Not only is the customer support excellent and the tool able to be developed easily by our in house developer; but also, the front end users find it an excellent way to manage and monitor their case loads. [...]

*Christina Jewell*



## Kanban Board

Kanban Board is a visualization tool for Microsoft Dynamics 365 and Dataverse (Power Apps) that converts your CRM data into an interactive Kanban view. It organizes records into lanes for a clear, card-based overview, enabling efficient tracking and management of your sales pipeline with seamless drag-and-drop updates. Enhance your CRM productivity and data visibility with this integrated app for agile, data-driven decision-making.



### Interactive Kanban with Drag & Drop

Optimize CRM data visualization with the Kanban Board's drag-and-drop feature for organizing opportunities, cases, and projects. Visualize and customize data, and track progress with interactive swim lane views for clear insights.



### Aggregate Data Insights

Effortlessly visualize aggregate values on your Kanban Board with customized numerical data. View aggregate field values on lane and row headers for streamlined data analysis.



### Optimized Business Process Flow Management

Kanban Board supports Business Process Flows (BPF) to organize and categorize records by stages. Enjoy precise transaction tracking and a clear, structured view of your processes.

## More Features



Enable Swim Lanes to organize tasks efficiently with consistent row sizes.



Option to show or hide the record owner's image on Kanban cards.



Prioritize tasks with customizable card colours. Sort and filter records by creation date.



Cards can be configured to support up to 3 quick activity actions, like Email, Phone Call, Task, etc.

## Benefits

Visualize and Track Progress

Value-Based Task Prioritization

Remove Bottlenecks in Workflows

Optimize Sales Processes



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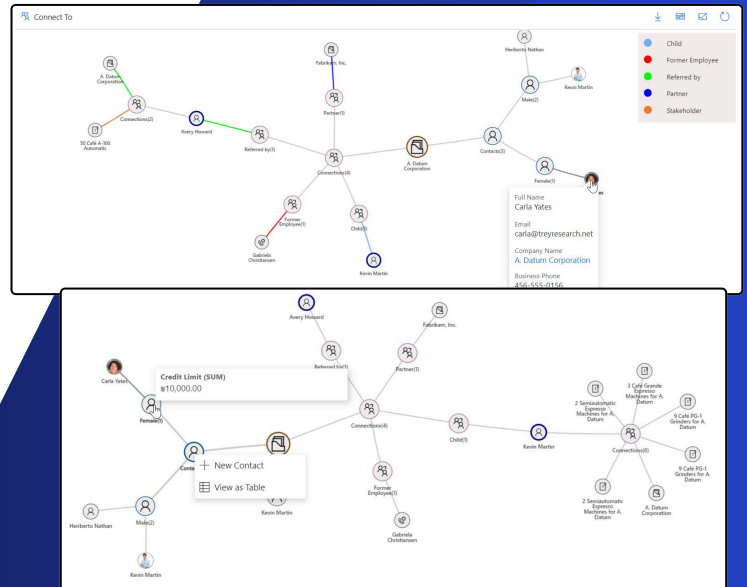


[crm@inogic.com](mailto:crm@inogic.com)



## Map My Relationships

Map My Relationships enables users to visualize key information in Dynamics 365 CRM with the help of two custom controls i.e., Relationships control and Connections control. Using these two, users can visualize relationships between various Entities/related records and also view the connection records in a single unified Mind Map View. It provides easy navigation to related records and quickly records various activities like phone calls, emails, or appointment for the related records.



### Comprehensive 360-Degree View

Gain a unified view of all essential data and explore multi-level relationships within records for deeper insights.



### Productivity Boosting Quick Actions

Create Emails, Tasks, Phone Calls, and Appointments directly from the relationship map, saving time and enhancing efficiency.



### Hierarchy View

Easily visualize CRM record relationships with Hierarchy View and manage all actions in one seamless tree-like structure.

## More Features



View aggregated CRM Records without creating separate rollup fields, streamlining data analysis.



View record relationships in a tree structure with Hierarchy View for easier navigation.



Assign images, and use custom labels, and color codes for personalized record views.



Automatically download relationship maps as images for easy sharing.

## Benefits

Clear Data Visualization

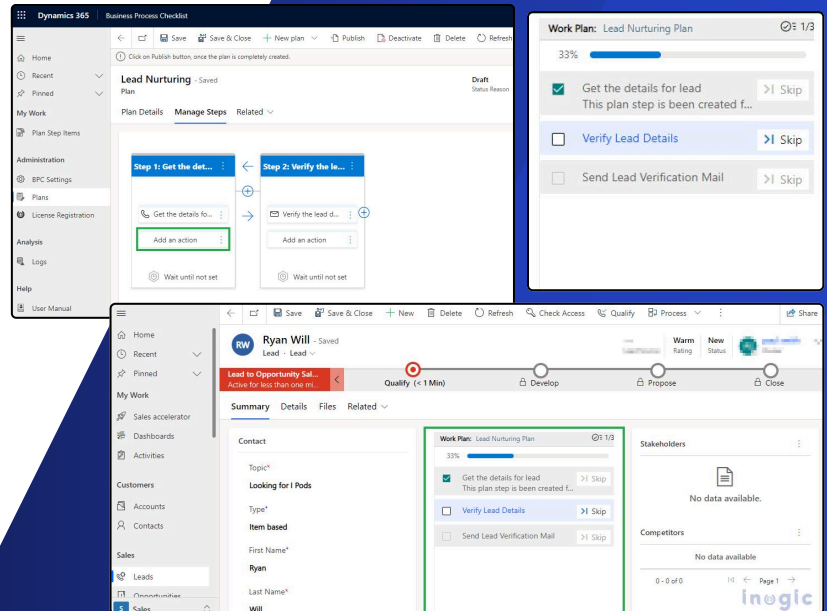
Informed Decision-Making

Efficient Navigation and Actions

Customizable and Accessible

## Business Process Checklist

Business Process Checklist is a Dynamics 365 CRM productivity app designed to streamline business processes by ensuring the optimum course of action for daily tasks. With Business Process Checklist, managers and administrators can create checklists/plans/playbooks for records and business process flow (OOB or Custom). They can set a course of action for salespeople and customer executives to follow.



### Create and Manage Playbooks

Design comprehensive playbooks with step-by-step instructions within Microsoft Dynamics 365 CRM. This ensures every employee follows the same best practices, leading to consistent and reliable results.



### Set Playbooks for Business Process Flow

Develop specific playbooks for each stage of both Out-of-the-Box (OOB) and custom Business Process Flows. By clearly outlining required actions at each stage, this feature boosts user efficiency and streamlines workflows.



### Follow Set Playbooks and Track the Progress

Sales reps can view and follow playbooks in Microsoft Dynamics 365 CRM to avoid missing steps and train new team members, while managers and users track tasks with progress bars for process compliance.

## More Features



Playbooks will get auto-displayed on CRM records when set conditions are met.



Checklist-Type playbooks allows for flexible, non-sequential task execution.



Process-Type playbooks ensure tasks are performed in a specific order.



Automate actions such as sending emails, making calls, etc. using playbooks.

## Benefits

Standardize Daily Best Practices

Error Reduction and Compliance

Enhanced Team Collaboration

Streamline New Hire Onboarding

# Enablement Apps



Clone Dynamics 365 CRM Records in Just One Click



Automate and Schedule or Click to Export Report/Document Templates/ CRM Views



Translate Dynamics 365 Records in Real-Time using Azure AI Translator



Create and Manage Real-Time Notifications in Dynamics 365 CRM



Lead.Assign.Distribute

Automate Lead Routing in CRM with Capacity and Round Robin Assignment Algorithms



Automate Recurring Billing Processes and Scale your SAAS-based Business

## Customer Reviews



Great functional tool for D365. This is indeed a great tool which helps to solve multiple use cases in several different applications therefore saves lot of time and effort on development. Additionally their customer service team is super responsive in case of any concerns.

Arun Gupta



[...]Inogic has integrated the solution more directly such that it is engaged automatically. The package has never failed to deliver. We are using it in multiple areas to automatically generate a document into a PDF and either send an email automatically or bring the email up on screen for the user to complete. Inogic is a great developer to work with.[...]

Tim Miller



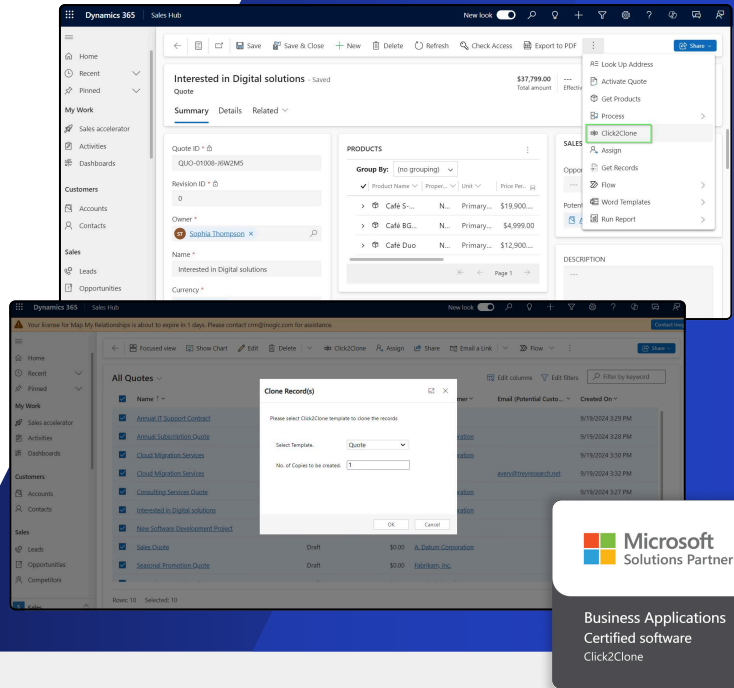
Great tool for e-mail notifications / alerts! Even better Support! We used this to build a subscription center to users can get email alerts when certain events happen within the CRM. Sometimes a new feature even gets delivered just some weeks after suggesting it. Quite impressive!

Robert Hawke





Click2Clone is a productivity app designed to streamline data entry and record creation by copying existing records in Microsoft Dynamics 365 CRM. This powerful tool simplifies the process of copying records, including standard and custom entities and all related child records. By automating and accelerating data replication, Click2Clone reduces manual effort, saves time, and enhances accuracy. Upgrade your data management with Click2Clone for a faster and more accurate Dynamics 365 CRM experience.



## Clone Single & Multiple Records

Click2Clone allows for one-click cloning of single records, making data management efficient. For enhanced productivity, you can also select and duplicate multiple records at once, freeing up time for more strategic tasks.



## Deep Cloning

Clone entire record hierarchies and related child records instantly with Click2Clone. For instance, Clone an Opportunity record along with its Quotes and Quote Lines to save time and maintain data consistency and integrity.



## Get Records

Users can effortlessly copy associated child records within the same entity using the "Get Records" feature. Simply click the "Get Records" button, select the source record, and instantly transfer child records to the target record.

## More Features



Copy one entity record to another entity along with relationships.



Workflow support allows for essential updates to cloned record data.



Identify the reference of the source record on the cloned record and vice versa.



Easily configure and select fields to be carried over during cloning.

## Benefits

Automate CRM Record Creation

Reduce Data Entry Errors

Boost Sales Scalability

Prioritize Core Work



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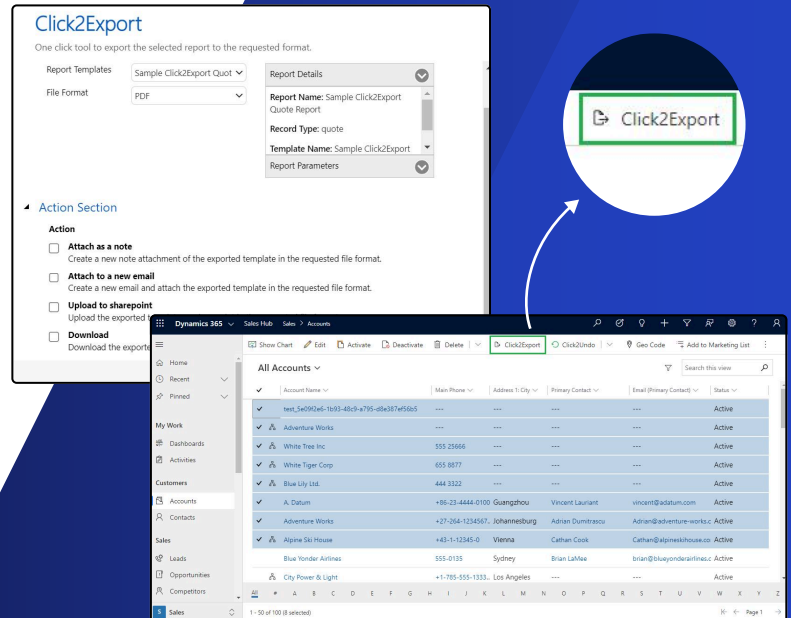


[crm@inogic.com](mailto:crm@inogic.com)





Click2Export is a productivity app for Dynamics 365 CRM that helps its users to Export and Email Dynamics 365 Report / View / Document Templates in just a single click. Reports can be exported to widely used file formats like PDF, Excel, Word, CSV and TIFF. It enables automated scheduling for regular exports, ensuring your data is always up-to-date. This app simplifies document sharing and management, streamlines processes, and consumes less time, making your CRM operations more efficient and hassle-free.



## Flexible Export Options

Allows users to export data of Dynamics 365 CRM in Report/ CRM Views/Word/Excel templates with a single click, saving time and boosting efficiency.



## Email to Non-CRM Users

Send emails to share reports/ documents to non-CRM users ensuring seamless communication with a broader audience.



## Automated and Scheduled Reporting

Automate exports and schedule regular report deliveries through workflows, ensuring timely and consistent data distribution.

## More Features



Users can easily export bulk Reports/ Word/Excel documents.



Export related records from the subgrid with a single click.



Export related records into a customizable document template with tailored columns.



Allows users to protect confidential files in PDF format with a personalized password, ensuring added security.

## Benefits

Eliminates Manual Document Conversion

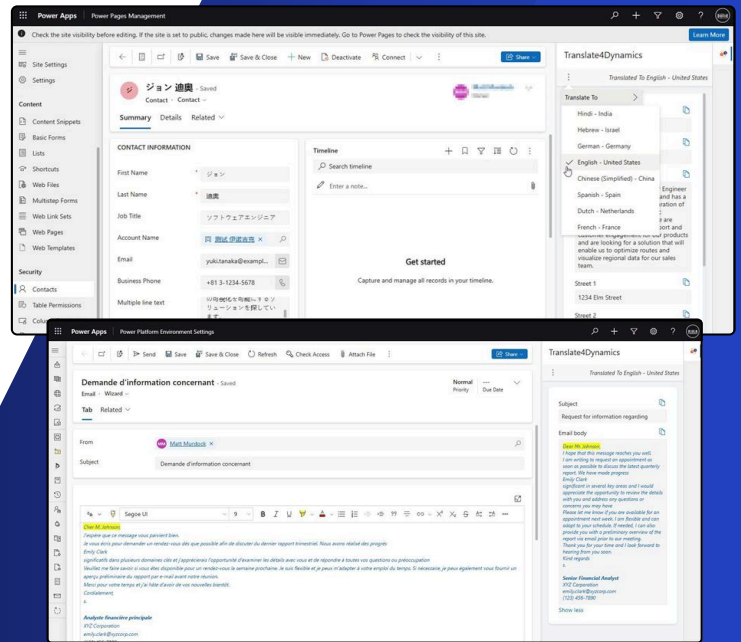
Enables Communication without Domain Restrictions

Ensures Document Security

Real-time Delivery of Updated Documents



Translate4Dynamics is a smart translation solution for Dynamics 365 CRM, enabling real-time translation of column values directly within your CRM. Powered by Azure Translator, it delivers instant, accurate translations in multiple languages. Ideal for global teams, Translate4Dynamics helps eliminate language barriers, simplifies communication, and enhances collaboration to make multilingual CRM interaction smooth, seamless, and efficient.



## On-Demand Translations

Translate configured columns as needed, with enabled CRM languages available for flexible, on-demand translations.



## Show Translations in Side Pane

With the side-pane feature, you can easily compare translations on CRM record form, providing instant clarity across different languages.



## Rich Text Translation

Translate all rich text fields in CRM effortlessly while preserving the original formatting —no changes to colors, fonts, or layout.

## More Features



Enable real-time translation of CRM Data with comprehensive control over which fields to translate.

## Benefits

Enable Real-Time Global Communication

Saves Time Through Automation

Offer Seamless Multilingual Support

Boosts Customer Satisfaction With Ease



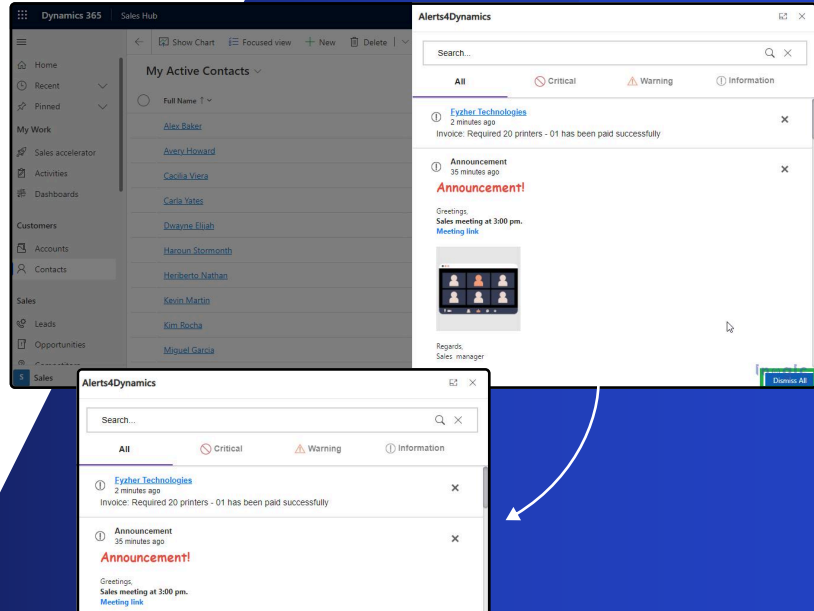
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[crm@inogic.com](mailto:crm@inogic.com)

## Alerts4Dynamics

Alerts4Dynamics is a real-time sales notification solution to create, schedule, snooze, and manage alerts for different Dynamics 365 CRM entities (OOB or Custom). With Alerts4Dynamics, managers can create alerts for individual records or a set of records satisfying a defined condition or based on an event. Managers can also notify their Dynamics 365 CRM users globally with Announcements. These alerts can be displayed to the users as Notifications.



### Diverse Alert Types

Alerts4Dynamics provides Announcement alerts for organization-wide updates, Record-Based alerts for specific records, Rule-Based alerts for conditions, and Event-Based alerts for immediate CRM events.



### Flexible Alert Modes

Customize alert delivery with Pop-ups and Form Notifications for CRM visibility, Email Notifications for both internal and external recipients, and User Preferences for personalized notification methods.



### Prioritize with Customizable Alert Levels

Categorize alerts into Information, Warning, and Critical levels to manage urgency. Address general updates, significant issues, and urgent notifications effectively to maintain prompt and effective response.

## More Features



Easily snooze and reschedule CRM alerts for effective communication.



You can also Define alert audiences to control who sees or skips alerts.



Create custom post messages and tag users on the timeline for notifications.



Receive daily, weekly, or monthly email digests of unread and read-not-dismissed alerts.

## Benefits

Right Information at the Right Time

Better Team Collaboration

Increase Productivity or Improved Visibility

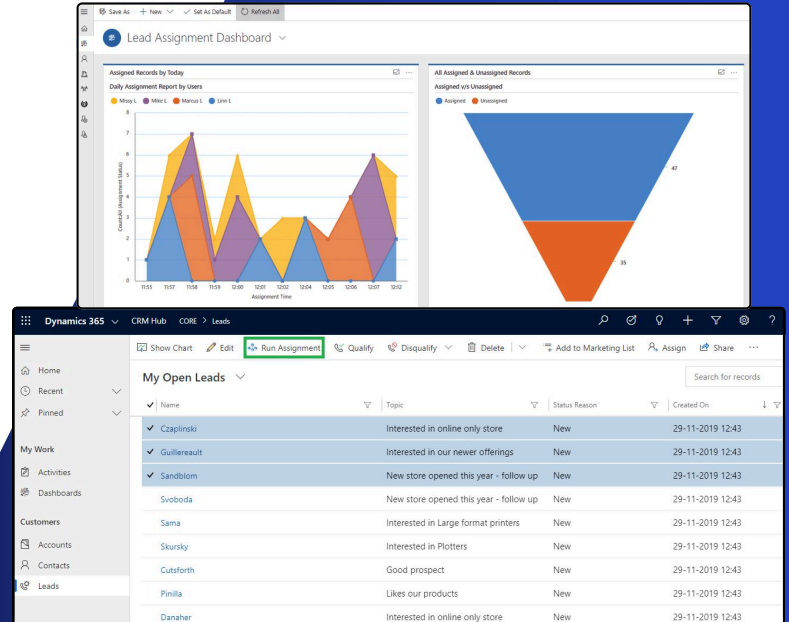
Faster Lead/Case Response Time



## Lead.Assign.Distribute

Lead Assignment and Distribution Automation systematically distributes leads or any other Dynamics 365 CRM entity record. The app ensures fair distribution of workload within each team by honouring their individual capacity.

Automated distribution and assignment improve efficiency, resulting in higher sales and profit.



### Automated Lead Assignment Rules

The Lead Assignment and Distribution Automation app ensures even lead distribution among sales team members using **Round Robin**, while **Capacity-Based** Assignment optimizes efficiency by balancing tasks according to individual user capacity.



### Set User Availability and Vacation

Managers can assign work items based on the availability status of users, which can be set as **'available'** or **'unavailable'**. Users can also update their availability status and manage their schedules, ensuring efficient task allocation.



### Periodic Work Item Assignment

Records or work items can be automatically assigned to users based on predefined time periods such as daily, weekly, or monthly. This feature helps streamline workload distribution and ensures that team members receive a fair share of tasks.

## More Features



Assign Leads with one click using the "Run Assignment" button.



Define the order of multiple assignment rules to control work item distribution.



Evaluate team performance by tracking assigned leads through dashboards.



Create multiple assignment rules and assign them to the users in queue.

## Benefits

Automate Lead Routing

Improved Conversion Rates with Faster Response Time

Fair Lead Distribution

Boosts Sales Efficiency



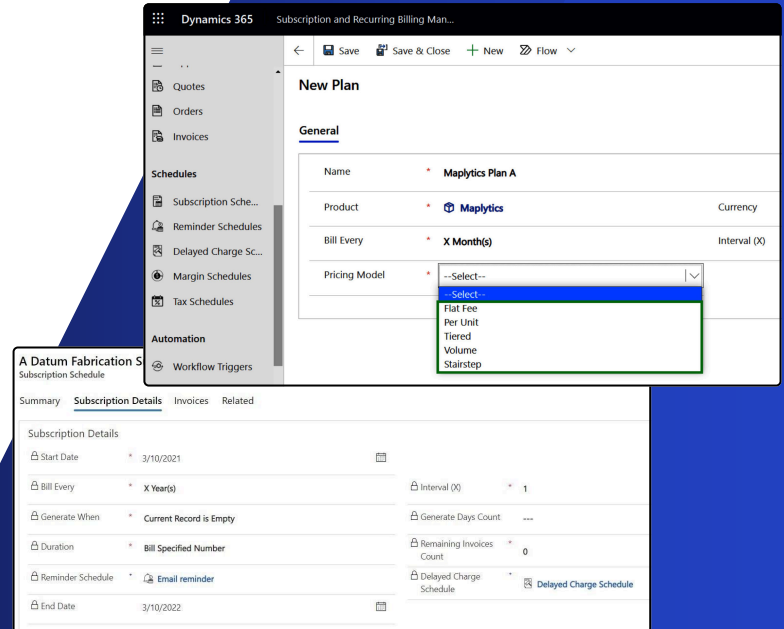
[www.inogic.com](http://www.inogic.com)



[crm@inogic.com](mailto:crm@inogic.com)



Subscription and Recurring Billing Management provides a robust platform for all subscription-based businesses to seamlessly manage and streamline the subscription and recurring billing processes within Dynamics 365 CRM. It automates manual accounting, and gives insight on business health with a detailed report of important metrics through comprehensive dashboards. An ultimate time-saving app, it helps businesses gain a competitive advantage.



## Subscription Schedule

Automate invoice and sales order generation for ongoing and new subscriptions, reducing human error and improving efficiency. By automating the recurring process of generating Invoices/Sales Orders, the risk of human error is reduced significantly.



## Proration

Proration allows customers to upgrade their subscriptions mid-cycle, adjusting for changes in user count or usage. This feature ensures they are charged precisely for the remaining days of their ongoing subscription.



## Multiple Pricing Models

Adapt to different pricing needs with support for Flat Fee, Per Unit, Tiered, Volume, and Stairstep pricing models. This flexibility ensures smooth billing and competitive advantage, accommodating diverse customer requirements.

## More Features



Create various pricing plans to better segment customers, upsell, and boost profitability.



Manage and extend free trials for subscription products.



Send automatic reminders for subscription renewals.



Analyze key metrics like MRR, ARR, and Churn Rate with a comprehensive dashboard.

## Benefits

Streamlined Billing Processes

Automate Manual Accounting

Reduce Human Errors

Insightful Reporting



www.inogic.com



crm@inogic.com



# User Adoption Apps



## User Adoption Monitor

Gain deep insights into user behavior, activities, engagement, and productivity within Dynamics 365



## GAMIFICS365

Gamify Dynamics 365 CRM for an engaging, motivating and enriching user experience

## Customer Reviews



A critical tool to understand the Voice of the Customer. We use User Adoption Monitor in our company to track who is using the system and what they are doing. By doing this it allow us to not only see what reps are up to but also allows us a mechanism to improve our company performance by better understanding who our customers are and what their requirements are. It is a critical tool to understanding the Voice of the Customer.

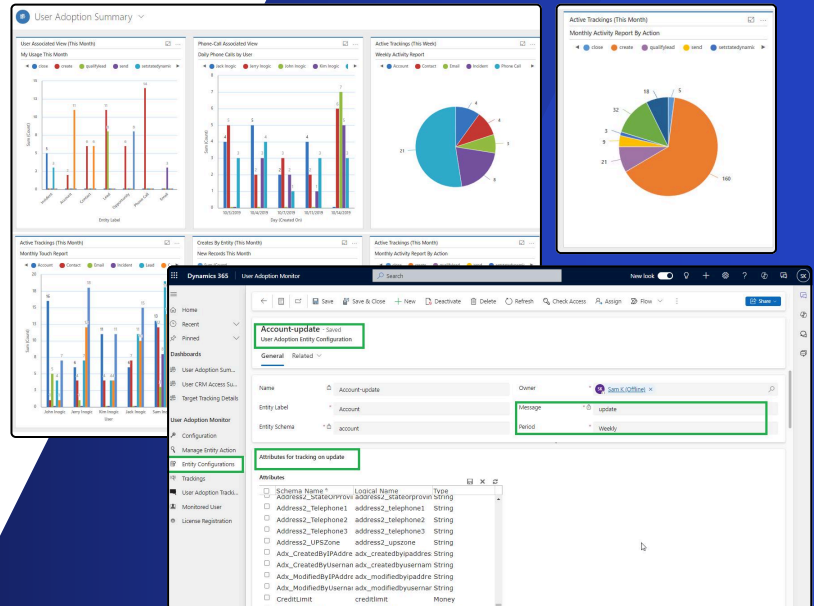
*Bryce Whitlock*





## User Adoption Monitor

User Adoption Monitor is a productivity app designed to improve user adoption by tracking and reviewing the actions performed by users in Dynamics 365 CRM. Managers and administrators can make strategic decisions around training and improving business processes based on the insightful utilization reports provided by the tool.



## CRM Access Tracking

Monitor and track the CRM access of your team members by observing various web activities or actions they perform within the CRM system.



## Data Quality

Ensure compliance with business requirements by alerting users to critical data fields that are incomplete for each entity record.



## Aggregate & Target Tracking

Analyze numeric field aggregations for specific actions and set targets based on counts or values to improve performance and goal management.

## More Features



Track actions such as Create, Update, Delete, and Assign on both standard and custom entities for a complete view of user interactions.



Generate daily, weekly, or monthly reports on CRM user activities to understand usage patterns and system utilization.



Customize tracking settings for individual users, allowing you to enable or disable tracking based on specific roles and responsibilities.



Track key changes in CRM without the clutter. It allows you to customize tracking, reduce information overload, and make data-driven decisions.

## Benefits

Comprehensive CRM Insights

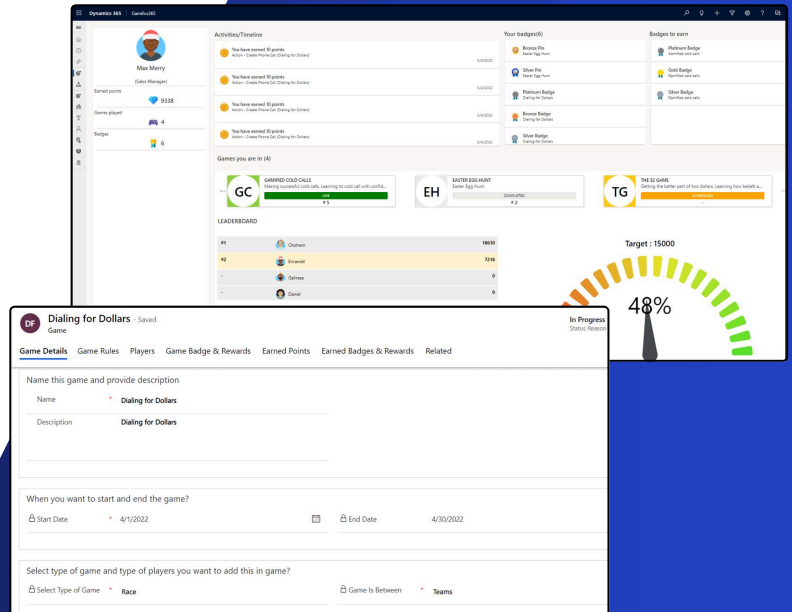
Flexible Usage and Record Tracking

Data and Performance Management

Customizable User Tracking



Gamiflcs365 is a CRM gamification solution that aims to enhance Dynamics 365 productivity and adoption by creating an enriching and motivating environment for users through gamification and engaging games and activities. It provides a medium to create appealing games to encourage healthy competition between both individuals and teams combined. These games help to ignite the competitive spirit of CRM users and motivate them to achieve over and beyond their individual capabilities thereby resulting in higher productivity and higher ROI.



## Versatile Game Creation

Gamiflcs365 offers diverse game types like Face-off, Race, and Challenge, with customizable rules for both individual and team play to boost performance.



## Personalized Scoreboards

View active, played, and upcoming games, along with points and badges, and track performance with personalized scoreboards.



## Set up Rewards for Achievements

Design and configure a rewards program in Dynamics 365 CRM, offering various forms such as points and badges to recognize and motivate achievements.

## More Features



Track games, points, and rewards on the go with the Gamiflcs365 mobile app.



Track player and team performance with daily leaderboards for easy progress monitoring.



Track and update player scores in real-time without affecting CRM performance.



Set daily, weekly, and monthly targets for individuals and teams through games.

## Benefits

Improve CRM User Adoption

Turn CRM Tasks into Fun Activities

Breakdown Big Goals into Clear Milestones

Boost Efficiency and Sales with Gamified Motivation



www.inogic.com



crm@inogic.com

# Integration Apps



Streamline Campaigns and Audience Management: Effortless Sync Between CRM and Mailchimp



Seamless Bi-Directional Data Integration Between QuickBooks Online and Dynamics 365 CRM

## Customer Reviews



We are using this solution to integrate MailChimp data and into D365 Sales and it is helping us to analyze our customer's data that comes from MailChimp and integrate with their CRM profile, the support team is super helpful, flexible and ready to cooperate.

*Tarek El Bacha*

**a&SCHRONORA**  
OFFICIAL ROLEX & TUDOR RETAILER



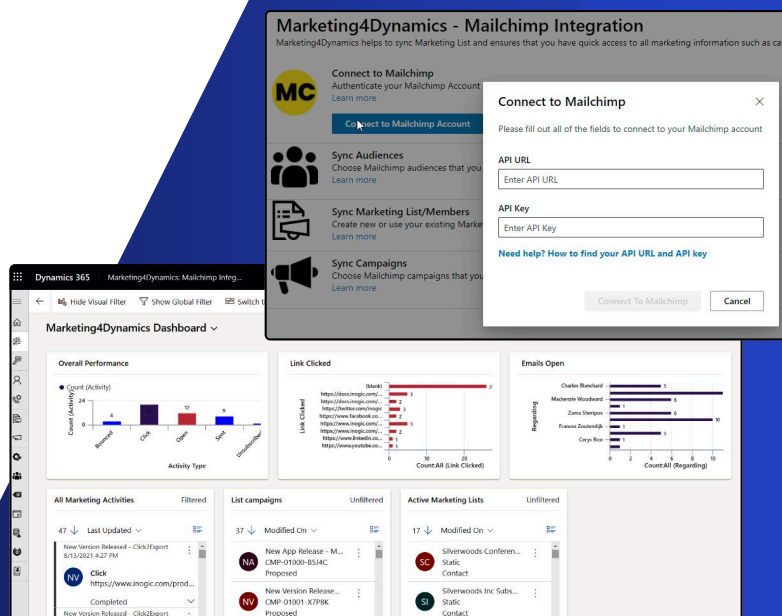
We are moving from Salesforce/ SyncQ to Dynamics/Inolink. So far, the differences are night and day. Inolink comes with its own native application to Dynamics. Making finance management easier than ever before. Highly recommend this service.

*Kyle Leavitt*

**4media group**  
INTELLIGENT COMMUNICATIONS



Marketing4Dynamics is an essential app that seamlessly integrates Dynamics 365 CRM with Mailchimp, synchronizing customer data and campaign insights across both platforms. With this integration, sales reps can instantly access key campaign details and member activities within Dynamics 365 CRM, eliminating the need to switch between systems. Marketing4Dynamics enhances marketing planning and execution, streamlining workflows and increasing productivity for Dynamics 365 CRM users.



## Seamless Mailchimp Integration

Sync Mailchimp audiences, groups, and members directly with Dynamics 365 CRM for efficient data management.



## All-in-One Campaign Management

Design, create, execute, and track Mailchimp campaigns – all within Dynamics 365 CRM, eliminating platform-switching and streamlining your marketing workflow from start to finish.



## Comprehensive Campaign Tracking

Sync Mailchimp campaigns and member activities with Dynamics 365 CRM to access detailed marketing performance data and utilize dynamic dashboards for in-depth analysis.

## More Features



Add/remove contacts and track engagement directly from Dynamics 365.



Access detailed metrics like open rates and CTR within Dynamics 365.



Leverage Mailchimp data in Dynamics 365 to identify potential leads.



Effortlessly sync and manage Mailchimp tags in Dynamics 365 for targeted audience segmentation.

## Benefits

Seamless Data Integration

Campaign Creation & Management

Comprehensive Campaign Insights

Enhanced Reporting and Analysis



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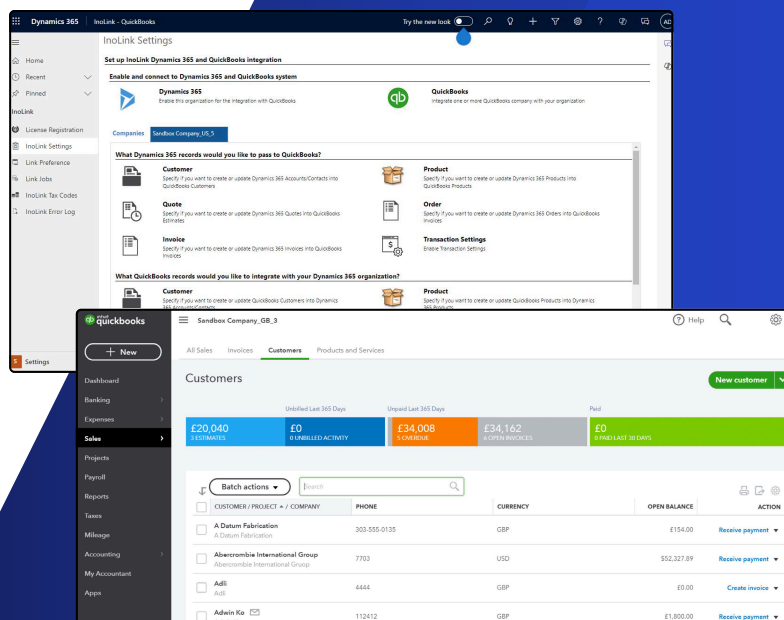


crm@inogic.com





InoLink is an Azure-based solution that integrates Microsoft Dynamics 365 CRM with QuickBooks Online, providing a 360-degree customer view by syncing transaction history and ageing details. It supports real-time syncing of customers, products, invoices, orders, and quotes, etc. and is compatible with Dynamics 365 v9.X and QuickBooks Online, and it is compatible with the US, Australia, Canada, and UK versions of QuickBooks.



## Bi-directional Syncing

Ensure real-time, two-way data flow between QuickBooks and Dynamics 365 CRM. Keep Accounts, Contacts, Products, and Prices consistent across both platforms with no duplication and full data integrity.



## Accounting Details in CRM

Users can get accounting details like sales transactions, payment information (paid, partially paid invoices), credit notes, etc. in Dynamics 365 CRM, which streamline financial tracking and enhance decision-making.



## 360-Degree View

Users can now gain a comprehensive 360° view of complete Customer Accounting details within Dynamics 365 CRM through InoLink, enabling more informed insights and improved customer relationship management.

## More Features



Real-Time data Synchronization from Dynamics 365 CRM to QuickBooks.



Automatically calculate sales tax for Quotes, Orders, and Invoices in Dynamics 365 CRM.



Sync data based on Customer Types between multiple QuickBooks companies.



View recent transactions, top customers, and pending invoices in CRM dashboards.

## Benefits

Seamless Data Consistency Across Platforms

Boost Efficiency

Automate Data Entry

Gain a 360° Customer View



[www.inogic.com](http://www.inogic.com)



[crm@inogic.com](mailto:crm@inogic.com)

# Inogic Professional Services

Inogic, a leading Microsoft ISV Partner with Gold CRM Competency, now offers Azure OpenAI and Copilot-enabled professional services along with Specializing in Dynamics 365 and Power Platform. Inogic offers top-tier innovative services and technical solutions. As a seasoned Outsourcing and Off-shore Development Partner, we boast unparalleled expertise in development, integration, implementation, and more!

**50+**

Dedicated office  
resources

**1000+**

Successfully  
completed projects  
so far

**20+**

Triumphant  
on-premise to online  
Migrations

**64%**

US-based  
Client base

**20+**

Services Across 20+  
Countries Globally

## Technology Stack



Azure OpenAI  
Services



Copilot Studio



Power Apps



Power Automate



Power Pages



Power BI

## Apps & Services



Dynamics 365 Sales



Dynamics 365  
Customer Service



Dynamics 365  
Field Service



Dynamics 365  
Customer Insights -  
Journeys



Dynamics 365  
Project Operations



Power Platform  
Pipelines



Continuous Integration &  
Continuous Delivery (CI/CD)  
using Azure DevOps



Outsourced  
Development



Offshore  
Delivery Center



15+ Years of Exclusive Dynamics CRM Operations  
19+ Dynamics CRM-based Apps on Microsoft AppSource Partners & Customers representation in 50+ Countries



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