



Upgrade from Dynamics CRM to Dynamics 365 Sales

Smarter Selling. Faster Growth. Powered
by Bizalom

Future-ready CRM migration with enhanced intelligence,
automation, and scalability.



+91 9840074824



info@bizalomgroup.com



www.bizalomgroup.com



Evolution of User Experience

From Legacy Dynamics CRM to Modern Dynamics 365 Sales

Legacy Dynamics CRM versions were built for basic operations. Dynamics 365 Sales introduces a unified, intuitive, and productivity driven user experience designed for modern sales teams.

Bizalom ensures your transition delivers not just a new interface, but a better way of working.

VISUAL LABELING

Instead of “2011 vs 2013 vs 2016”, use benefit-based labels:

Legacy Dynamics CRM

Traditional layout

Limited personalization

Multiple clicks to access data

Separate modules



Modern Dynamics 365 Sales

Unified dashboard experience

Role based navigation

Faster access to insights

Consistent UI across devices

FEATURE HIGHLIGHTS

What's Improved in Dynamics 365 Sales

Unified Interface

All sales activities, insights, and records in one seamless view.

Role-Based Dashboards

Personalized dashboards for sales reps, managers, and leadership.

Microsoft Ecosystem Ready

Native integration with Teams, Outlook, and Power Platform.

Faster Navigation

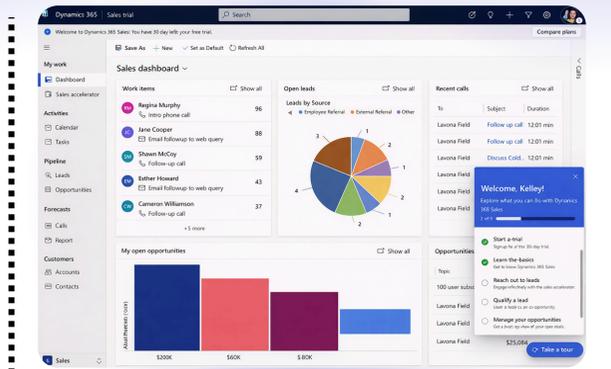
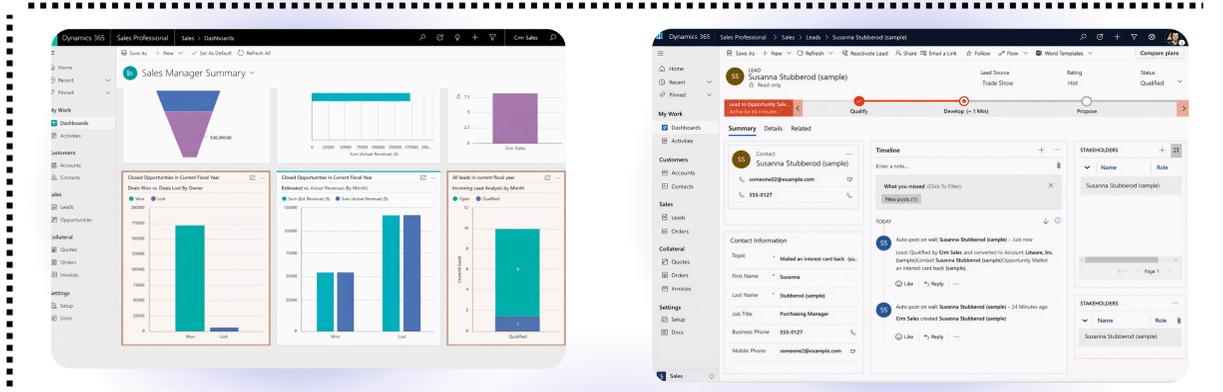
Reduced clicks and smarter workflows improve daily productivity.

Cross-Device Consistency

Same experience across desktop, tablet, and mobile.

The Evolution of Dynamics User Experience

From legacy interfaces to a unified modern experience



With Bizalom, user experience evolves into business efficiency.

Bizalom Platform – User Experience Evolution

Bizalom delivers a modern, intelligent user experience designed to simplify work, improve productivity, and support business growth at every stage.

Our platform evolves from a strong foundation into a fully cloud driven, smart interface that adapts to every role and workflow.

Personalized Experience

Bizalom provides a tailored user experience for every department and role, ensuring each user sees exactly what they need to work faster and smarter.

Brand-Aligned Interface

The platform supports full branding customization, allowing businesses to apply their own logo, colors, and themes for a consistent brand identity.

Intelligent Search

Bizalom offers smart, global search capabilities that allow users to quickly find data across multiple modules and records with ease.



Advanced Record Search

Bizalom enables fast and accurate searching across multiple record types, helping teams retrieve information without delays.

Live Excel Integration

Bizalom supports advanced Excel integration with live data syncing, enabling real-time updates and smarter decision-making.

Multi-Device Consistency

Bizalom delivers a seamless and consistent experience across web, mobile, and tablet devices, ensuring productivity anywhere.

Process-Driven Workflow

Bizalom provides an intuitive, stage-based process flow that helps teams track progress from start to completion with clarity.

Why Bizalom UI Stands Out

Modern. Intuitive. Business-Ready.

Bizalom's user interface is designed to reduce complexity, boost productivity, and adapt to every role—from sales and marketing to operations and leadership.

With a cloud-first approach, Bizalom delivers a consistent, fast, and intelligent experience across all devices.

Seamless Export & Reporting

With one-click export options, users can download data to Excel and generate reports effortlessly for analysis and sharing.

Inline Editing

Users can edit records directly from grids and dashboards without opening multiple screens, saving time and improving usability.

Contextual Guidance

The platform includes in-context help and guided assistance, making it easier for users to understand features and complete tasks efficiently.

Quick Access & Favorites

Users can instantly access recently used items and pin important records, reducing navigation time and improving efficiency.

A Smarter Interface for Faster Business Decisions.

Bizalom – Documents & Reporting Excellence

Smarter Documents. Clearer Insights.

Bizalom simplifies how businesses manage documents and transform data into actionable insights. Our platform brings secure storage, seamless collaboration, and powerful reporting together in one intelligent ecosystem.

All your files. One secure platform.

Upload, store, and access documents directly within your business records—fast and effortless.

Secure & Structured Storage

Documents stay connected, protected, and easy to find with role-based access.

Seamless Collaboration

Work better together with smooth cloud-based document sharing and control.

Powerful Business Reports

Turn data into meaningful reports that drive faster, smarter decisions.

Interactive Dashboards

Visualize performance, trends, and opportunities in real time.

Cloud-Ready Intelligence

Access documents and reports anytime, anywhere—securely

Bizalom. Where documents become decisions.





Bizalom | Intelligence & Integrations

Smart Alerts

Get real-time notifications for tasks, follow-ups, and critical activities.

Customer Intelligence

Capture feedback and insights that matter to drive better decisions.

Low-Code App Extensions

Build and connect custom apps to fit your business workflows.

Unified Data Integration

Sync data seamlessly across systems for a single source of truth.

Team Collaboration

Connect teams and data in one place for faster action.

Email + CRM Sync

Track emails, meetings, and updates without leaving your inbox.

Centralized Notes

Access and update customer notes directly within records.

One platform. Connected intelligence. Faster growth.

Bizalom | Process Automation

Automate More. Work Less. Scale Faster.

No-Code Business Logic

Add smart rules to forms and grids without writing a single line of code.

No-Code Business Logic

Automatically calculate totals, dates, and metrics with real-time accuracy.

Built-In Workflow Engine

Design and run automated workflows that handle approvals, updates, and notifications seamlessly.

Guided Process Flows

Lead users step-by-step through structured processes to ensure consistency and data accuracy.

Cross-Platform Automation

Connect CRM with multiple systems using intelligent automation for end-to-end process control.

Cloud-Ready Automation

Scale automation effortlessly with modern, cloud-powered process execution.



Business Impact

- ◆ Reduced manual work
- ◆ Faster process completion
- ◆ Improved data accuracy
- ◆ Standardized operations
- ◆ Enterprise-grade scalability

Turn processes into performance with Bizalom.

Bizalom – Related Solutions

Project & Revenue Intelligence

Win more deals
Faster project delivery
Real-time cost & revenue insights

Self-Service Business Portals

Secure web access
Easy data & request management
24/7 customer self-service

360° Customer Intelligence

Unified customer profiles
Real-time behavioral insights
Personalized engagement



Solution

Bizalom – Sales & Marketing

Smart Campaign Management

Complete Sales Automation

Sales Insights & Analytics

Lead to Deal Tracking

Custom Deal Closure

Social + CRM Integration

Omnichannel Marketing

Automated Lead Nurturing

Targeted Campaigns & Events

Bizalom – Sales & Marketing

Smarter ERP. Real Business Impact.

- ◆ Modern, easy-to-use experience
- ◆ Built-in features with minimal customization
- ◆ Lower IT and infrastructure costs
- ◆ Scales as your business grows
- ◆ Secure, reliable, and always available
- ◆ Work from anywhere, on any device
- ◆ Seamless integration with productivity tools

Why This Matters for You

With Bizalom, you don't just upgrade software you simplify operations, reduce costs, and future proof your business with a cloud-first, secure, and scalable ERP approach.

Why Move to **Bizalom Dynamics 365?**

Built for Growth. Secured by Design.

Enterprise-Grade Security

Your data stays protected with cloud first security, controlled access, built in disaster recovery, and always on system monitoring so your business runs without risk or downtime.

Business Flexibility

Pay only for what you use. Scale users, features, and capacity as your business grows without heavy upfront investments or rigid infrastructure.

Lower IT Maintenance

No servers. No complex upgrades. No constant patching.

Bizalom handles the platform, updates, and performance letting your IT team focus on innovation, not maintenance.

Work Across Any Device

Run your business anytime, anywhere. Bizalom Dynamics 365 works seamlessly on desktop, tablet, and mobile no special setups, no remote desktops, just instant browser access.

Always Up-to-Date

Forget major upgrades. Bizalom keeps your system continuously updated with the latest features, performance improvements, and user experience enhancements automatically.



Let's Get You Future-Ready

Move to Bizalom Dynamics 365 with Confidence

Modernize your ERP with Bizalom — a trusted partner that simplifies complexity, minimizes risk, and delivers a smooth, confident move to the cloud.

Start Your Transformation Today

Talk to Bizalom. Build what's next.



phone: +91 9840074824



Email: info@bizalomgroup.com



Webdite: www.bizalomgroup.com