

One Window

M A N Y C A P A B I L I T I E S

MSD365 CRM

The slide features a central orange horizontal band with the text "RAMA Profile" in white. This band is flanked by dark blue horizontal lines, each with a white circle at its end.

RAMA Profile

- RAMA Group (Ram Agarwal & Associates, CA Firm + RAMA Corporate & IT Solutions & LLP) is an enriched and highly experienced IT consulting firm with technology partnerships with Microsoft, Spine, Automation Edge, Finalyzer to provide implementation, support, upgrade, migration services for their products in its boutique.

- RAMA Group has a professional resource team of 175+ people, with 50+ resources dedicated in providing quality ERP & IT services to across industries such as Food and Beverage, Restaurants, Entertainment, BFSI, Manufacturing, FMCG, Pharmaceuticals, Textiles, Real Estate, Infrastructure, and Oil & Gas.

- Headquartered in **Mumbai** and another offices at **Dubai** in UAE and **Hyderabad** in India, RAMA Group has served about **200+ Mid to Large size corporate clients across industries**, under all its service verticals.

Focused Service Areas

- ✓ ERP Implementations
- ✓ Upgrades, Migrations & Rollouts
- ✓ Data Analytics (Power BI Implementations)
- ✓ Robotic Process Automation (RPA)
- ✓ Indirect Tax (GST & VAT) Consulting
- ✓ IT Network & Data Security Audit
- ✓ SOP Design and Documentations
- ✓ Process Reviews & Re-engineering

15+

Cities - Clients served in Asia, GCC, Africa, US & Europe

15+

Ultra large group and MNCs clients served

175+

Total Resource team

50+

team of techno-functional ERP / systems consultants

Ram Agarwal - FCA
Founder & Managing Partner
(IA, ERP & Business Advisory Services)

Ram, with nearly 25 years of comprehensive experience, leads the organization, spearheading business development, serving as the key figure in quality assurance, and possessing expertise in Risk Advisory & Management Assurance, Corporate Finance, Business Advisory, and ERP Implementation services.

Manish Patil- BE, MBA
VP – Strategy & Consulting

With over 15 years of experience in business development, sales, and consulting, Manish is a strategic leader and specializes in driving growth through innovative strategies, channel partnerships, and enterprise technology transformation. His expertise spans SAP, Oracle, and Microsoft Dynamics, and now extends to AI-powered solutions, including generative AI agents, predictive analytics, and cloud-native platforms. Passionate about solving complex business challenges, he focuses on delivering client value and sustainable growth by aligning emerging technologies with business strategy.

Samit Mallick- MCA
MCP Certified (Navision, Business Central, LSR)
Associate Director
(FnO | Business Central | Power BI)

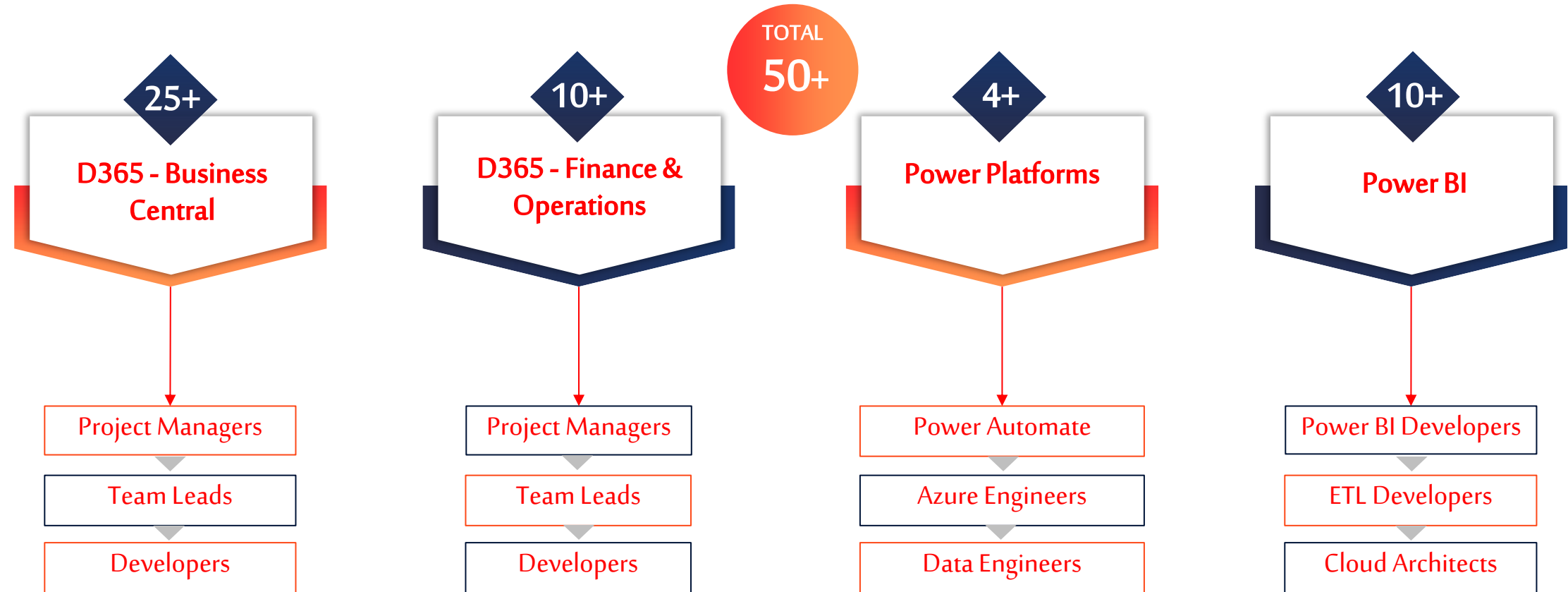
15+ years of experience Samit is the brain behind understanding and mapping critical & complex business processes into the ERP with industry best standards.

Mahesh Kavathekar- B.COM
Solution Architect— Microsoft Dynamics Practice

With 11+ years of experience as a Functional Consultant, Mahesh specializes in MS Dynamics Business Central, D365 F&O (Finance), and Navision, with expertise in ERP implementation, go-live support, and key user training.

Ashok Thakur- MBA
IT Head & ERP Project Manager

With 12+ years of experience, Ashok excels in overseeing project execution, ensuring timely delivery, and maintaining quality standards. Experienced in leading cross-functional teams, ensuring IT compliance, and optimizing enterprise solutions across industries.



> Proficient Data Analytics team comprising of BI developer, UI/UX, ETL

> IT and Azure Cloud Architects

Qualification Index

- > Multi Field Qualified Senior Team – CAs, MBAs, IT (B. Tech / M Tech) and PMP
- > Mid Level Team – IT (B. Tech / M Tech), MCA, PMP, Prince2 and ITIL
- > Microsoft Certified Professionals
- > Qualified DBA (Database Administration)
- > CCNA (Cisco Certified Network Associates) & CCNP (Cisco Certified Network Professional)

Business Process Management

- **Evaluate** (Critical Process Review, Risk Assessment / GAP Analysis, Management Audits)
- **Build** (SOPs, Risk & Controls Matrix, Internal Controls Framework, CCM, ERM etc.)
- **Strengthen** (Cost Optimization, Profit Improvement Studies, Increase Process Efficiencies - Time/Cost)
- **Automate** (Digital Transformation using ERP, BI, RPA, IoT, IIoT, Data Analytics etc.)
- **Improve** (Assist in Implementing Recommendations & Establishing Framework for Periodic Reviews)
- **Transfer** Business Process on models like Build Own Operate (BOO) and Build Own Transfer (BOT)

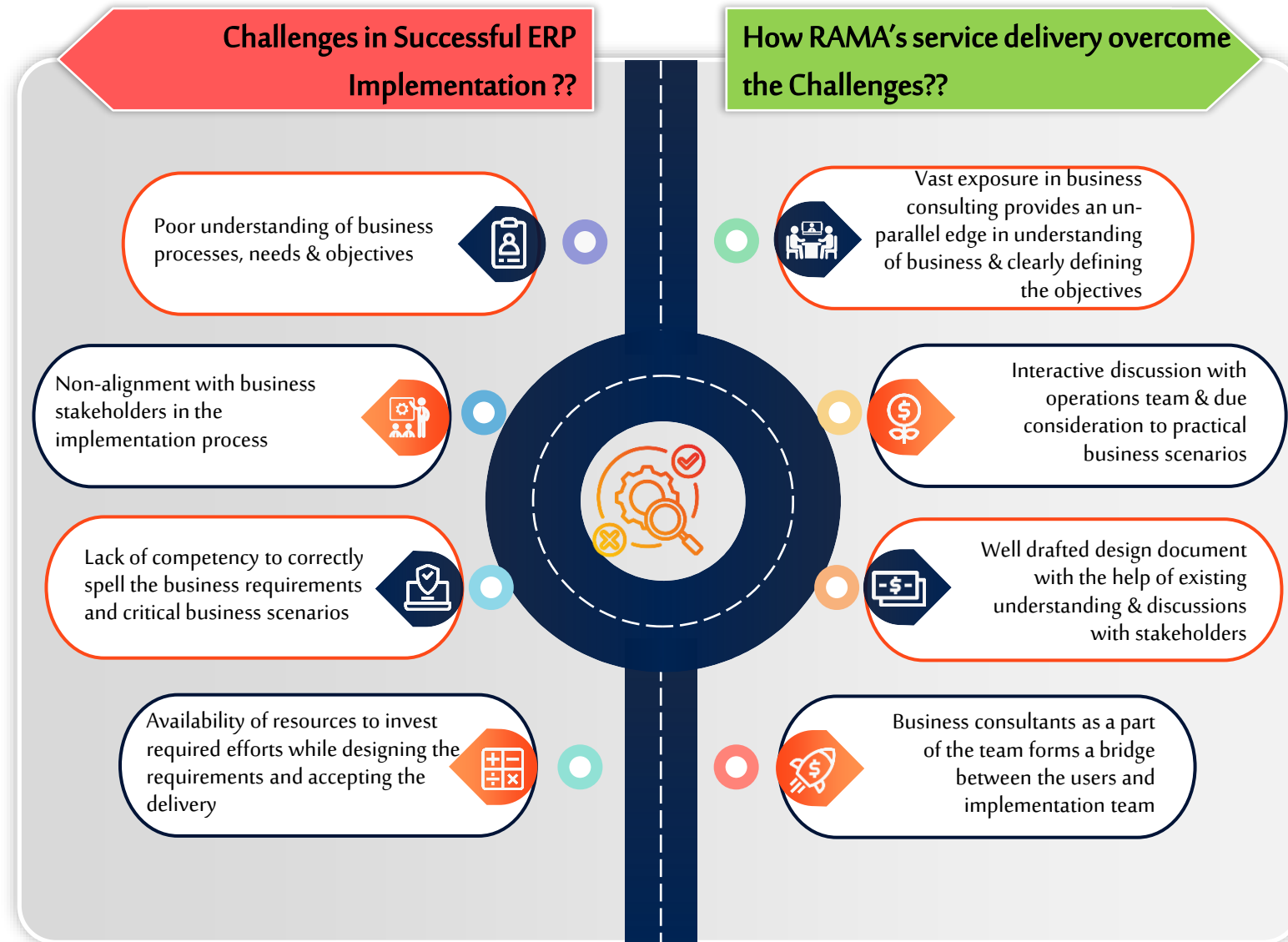
Technology

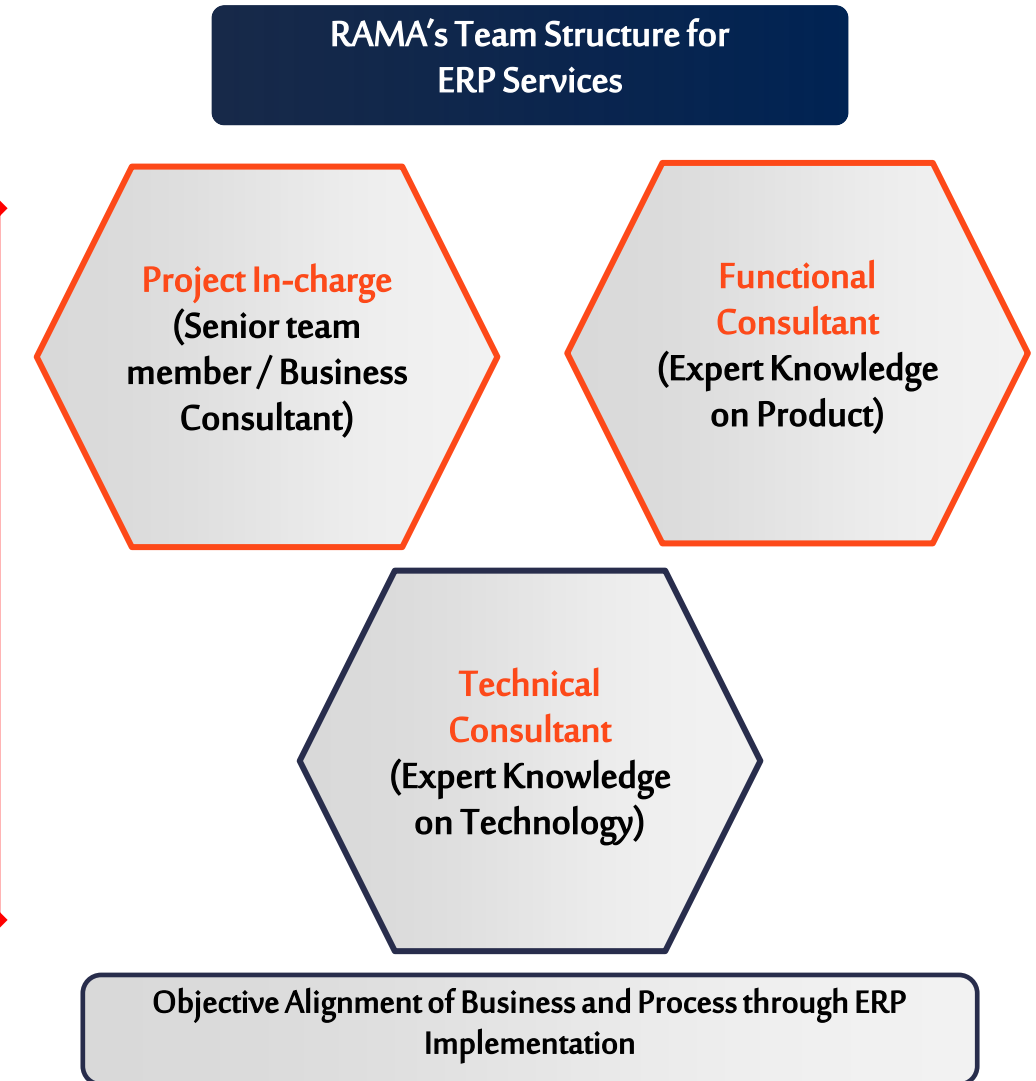
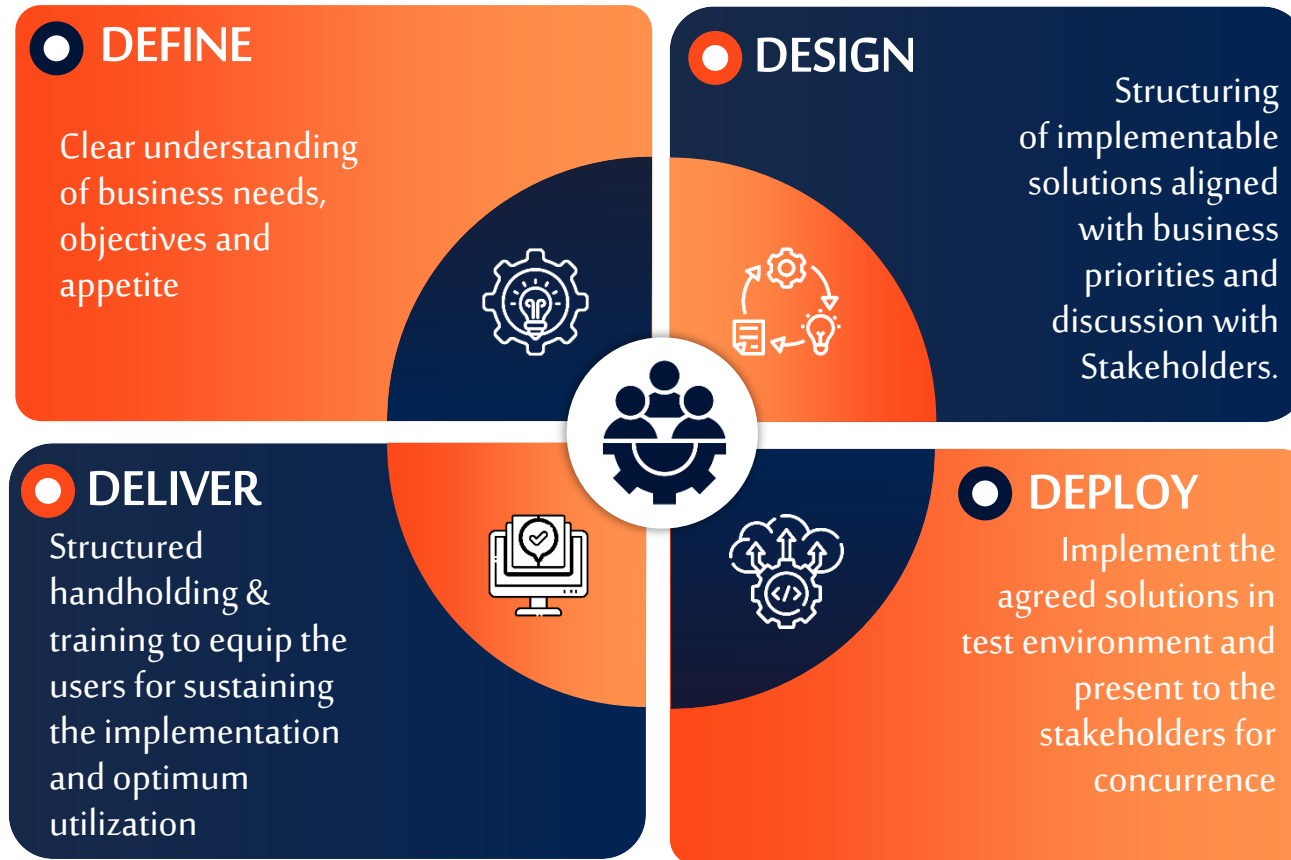
- **Microsoft Partner** to implement, upgrade, manage & support MS products like Dynamics 365 (Business Central, AX, Navision, CRM, Power BI etc.)
- **Partners** with product companies to manage functions like MIS Reporting, Mgt. Dashboards, HR, Automated AP, AR, Reconciliations etc.
- **ERP Consulting** to identify apt ERP Product & Implementation Partner, Review existing ERP to Enhance Utilization, Integrate with other software etc.
- **ERP Project Management** preparing Functional Requirement Documents (FRDs), Perform UAT, etc.
- **Process Automation Solutions** using **Emerging Technologies** like **Robotic Process Automation**, IoT, IIoT etc.

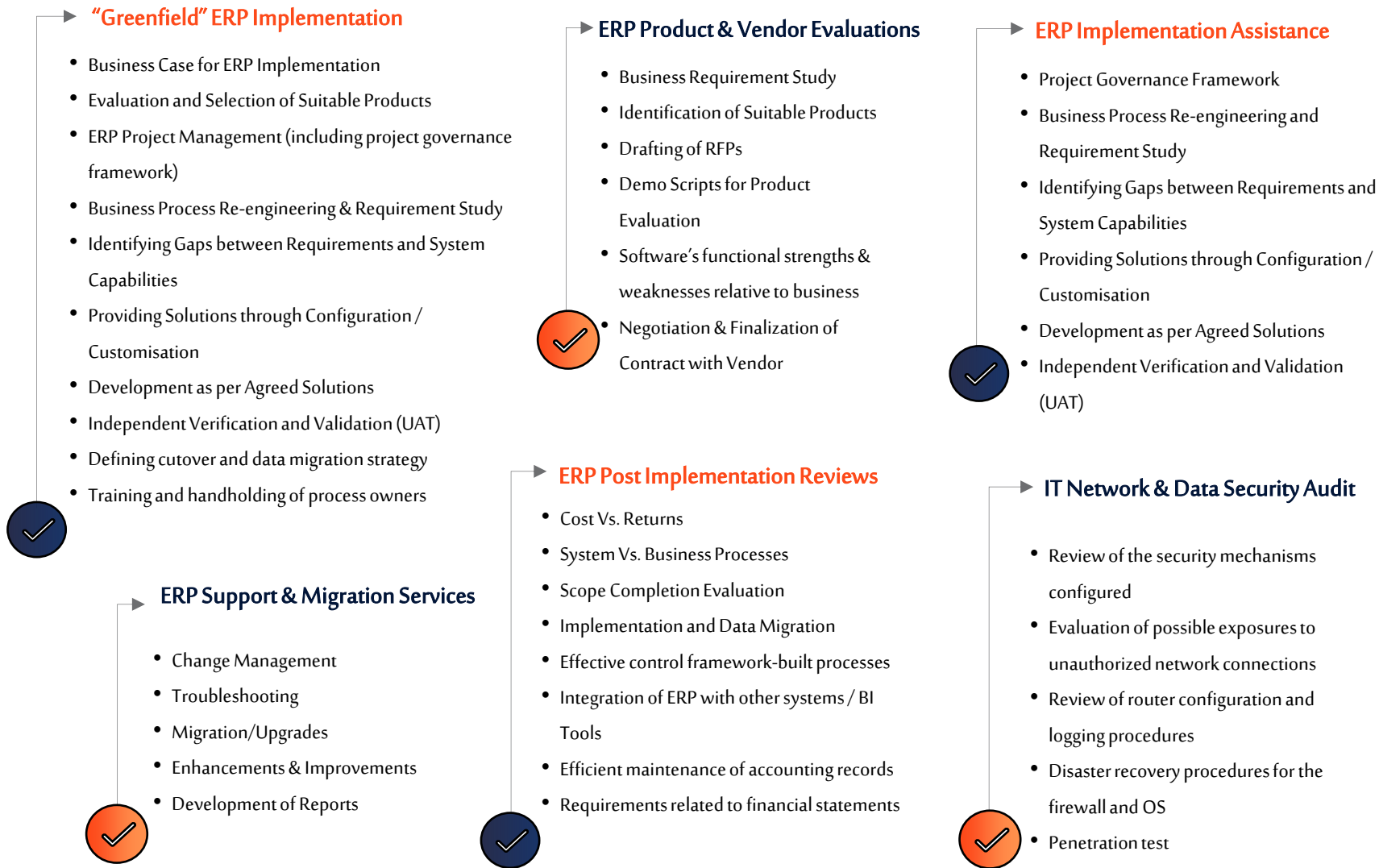
Compliance

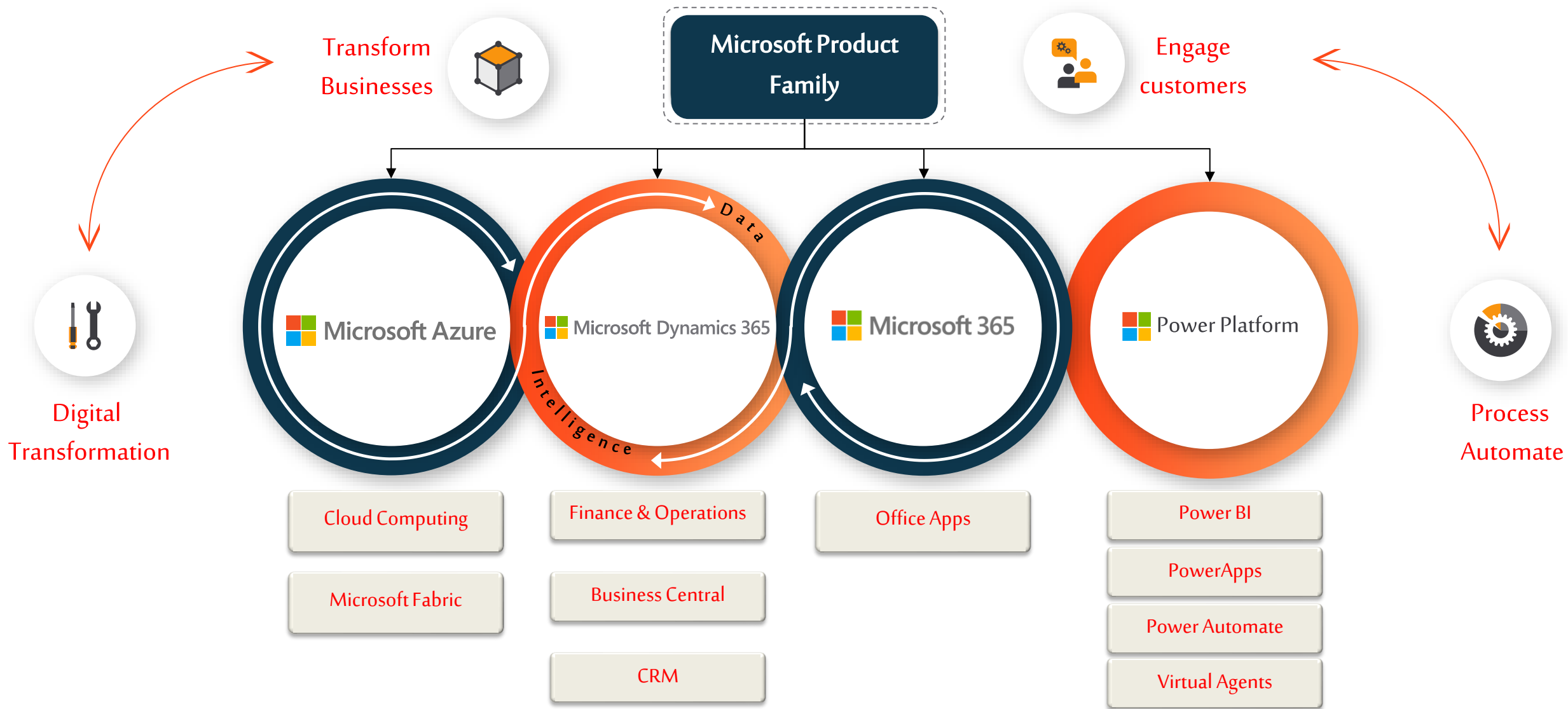
- **Indirect Tax Compliance** in UAE and India (GST and UAE VAT)
- **Direct Tax and Corporate compliance** in India (Income tax, ROC filing, returns & assessment)
- Structuring of **Business Transactions**
- **Assistance in Accounting and Audits**
- **Transaction advisory and due diligence**
- **Fraud Risk Management and investigation**

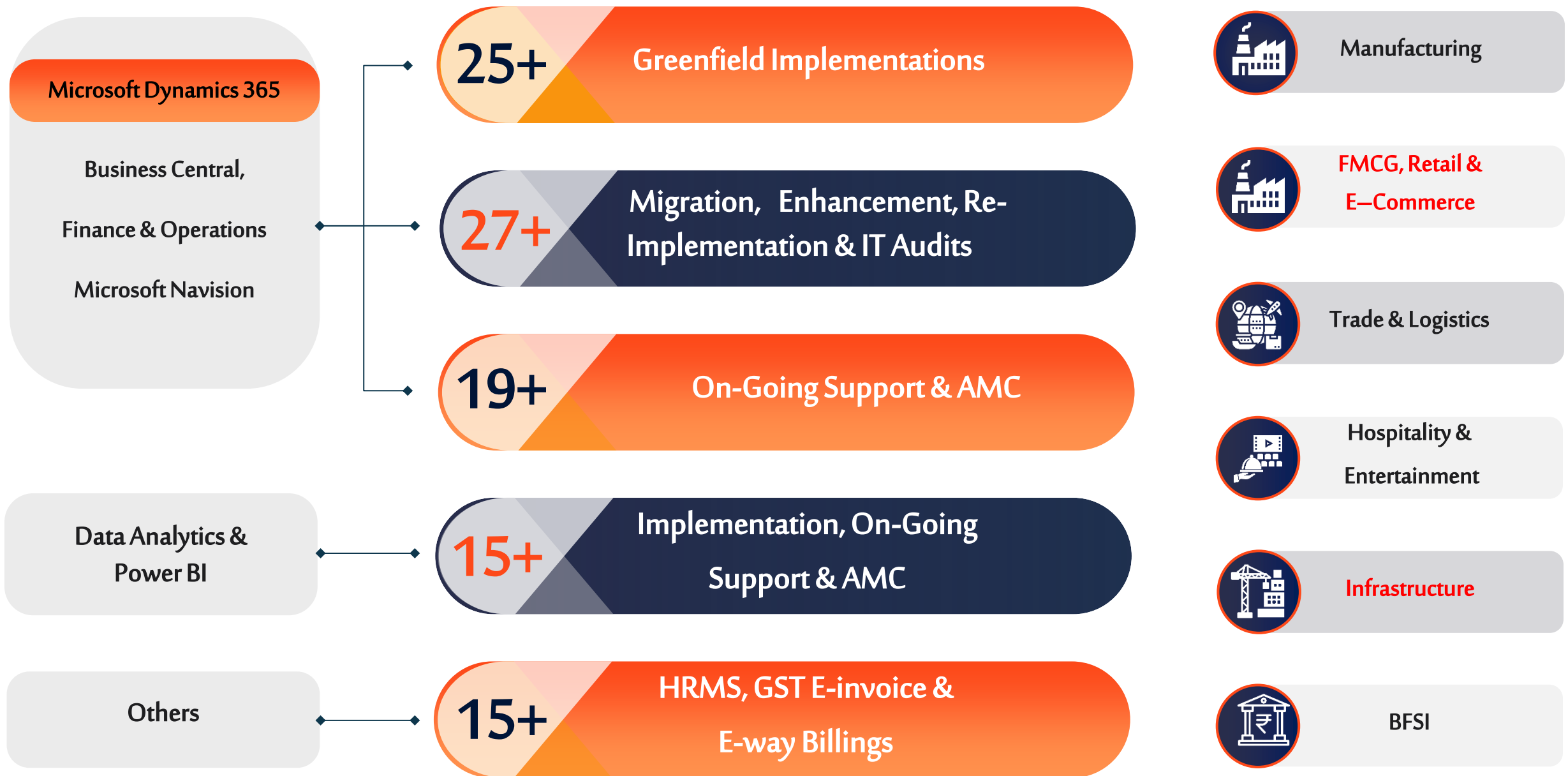








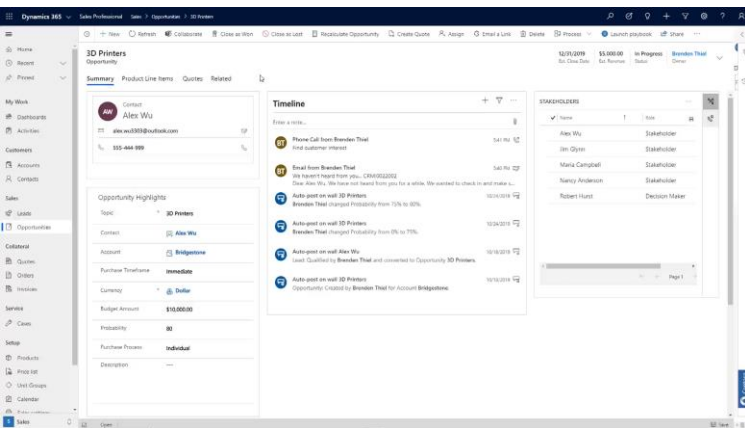
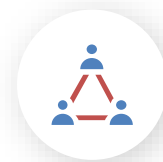




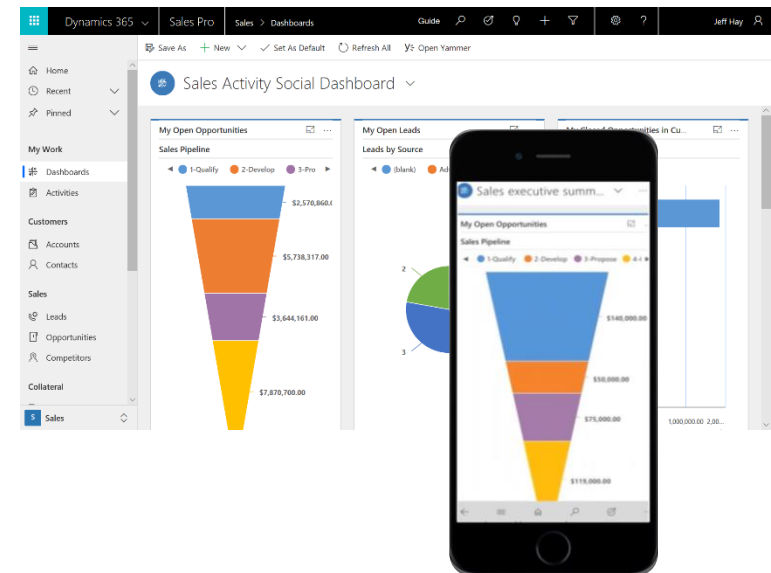


Microsoft Dynamics CRM

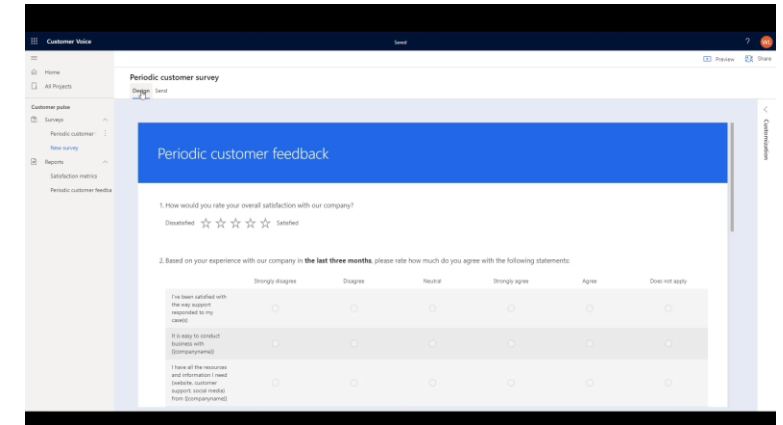
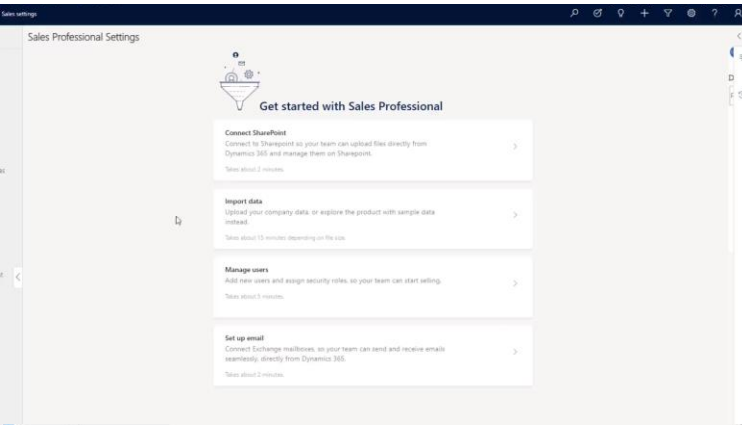
ADAPT TO THE NEW SELLING ENVIRONMENT



- Collaborate on deals in a modern workspace



- Work from wherever you are with the mobile app

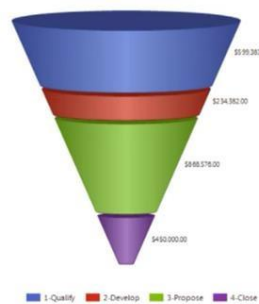
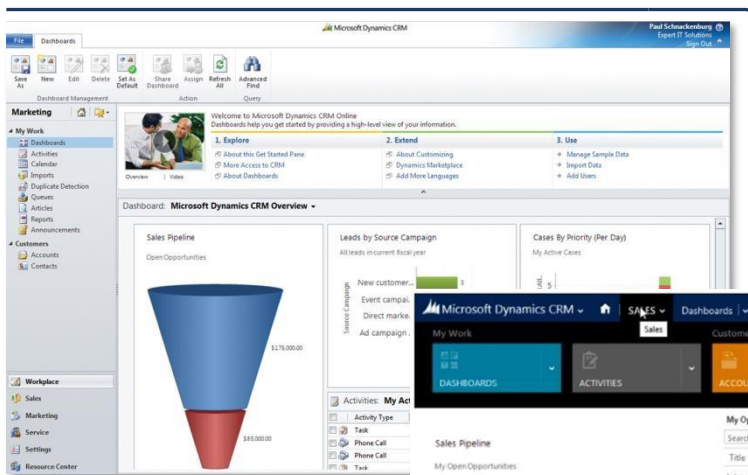


- Get up and running quickly

- Count on a platform that grows with your business

- Configure the application for your specific sales processes

USER INTERFACE



This screenshot shows the Microsoft Dynamics CRM 2011 interface with the 'Sales' dashboard selected. The 'My Open Opportunities' table is displayed, showing a list of potential customers and their associated revenue and probability.

Title	Potential Customer	Est. Close Date	Est. Revenue	Probability	Rating
Interested in Product Designer		4/2/2013	\$349,383.00	70	Hot
Interested in Product Designer	Bold Sales Accessories	6/11/2013	\$234,382.00	20	Cold
Interested in Factory Designer	Coho Winery	6/18/2013	\$382,796.00	50	Warm
Interested in Plotters	Daring Rides	7/26/2013	\$685,780.00	50	Warm
Interested in services project	Adam Smith	7/31/2013	\$450,000.00	50	Warm

This screenshot shows the Dynamics 365 Sales dashboard. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Dashboards'. The dashboard is divided into several sections: 'Business' (Business Management, Templates, Product Catalog, Service Management, Mobile Offline, Sync Error), 'Customization' (Customizations, Dynamics Marketplace), 'System' (Administration, Data Management, System Jobs, Document Management, Auditing, Email Configuration), and 'Insights' (Activity Feeds Configuration, Activity Feeds Rules, Security, User Settings). The bottom section displays a message: 'There is no data to create the Sales Pipeline chart.'

USER INTERFACE

The screenshot displays the Microsoft Dynamics 365 CRM interface. The left sidebar shows navigation options: My Work, Customers, and Management. The main area shows the contact record for 'Intersys Group Sp. z o.o.' with fields for Annual Revenue, Number of Employees, and Owner (Justyna Kolodziejczyk). The timeline shows recent activities, including a sales meeting and an appointment. The right pane shows the relationship assistant and contact details.

The screenshot displays the Microsoft Dynamics 365 Sales Activity Dashboard. The dashboard includes a funnel chart for 'Open Opportunities' showing the pipeline by sales stage (Close, Develop, Propose, Quality) with values: \$103,814.00, \$23,281,410.00, \$22,544,363.00, and \$22,544,363.00. It also features a pie chart for 'All Opportunities' by status (Open, Won, Lost) with values: 11, 50, and 36. The right pane shows a list of 'Open Leads' with names and descriptions.

Functionality, Services and Tools	Cloud
Tailored user experience for every workstream with apps	
Branding with a custom logo and colors	
Configure Bing-like keyword search across tables	
Access recently used items and pin favorites	
Easily search across up to 10 record types	
Use Export to Excel to download worksheets	
Immersive Excel Online experience available from Export to Excel	
Rich in-line editing directly from grids and sub grids on the web or tablet apps	
Matching experience on mobile and browser	
Rich multi-media in context guided help	
Streamlined intuitive user interface to track a process through stages to completion	

Functionality, Services and Tools	Cloud
Quickly upload and download files and images associated with specific records with File and Image fields	
Database connected document storage which associates files with records and respects the security model without consuming database capacity	
SharePoint and OneDrive Integration	
Fetch based SSRS reports	
SQL based SSRS reports	
Power BI analytics in Dynamics 365 dashboards	

Functionality, Services and Tools	Cloud
Assistant notifies you of recent and upcoming activities to act	
Gather and track the customer metrics that matter with intuitive surveys with Customer Voice	
Integration with Power Apps Canvas Apps	
Cascade data across all Dynamics 365 on- premises and online systems	
Integration with Microsoft Teams	
Seamless and responsive integration between Outlook and Dynamics with App for Outlook	
Use OneNote to take or review customer notes from within a Dynamics 365 record	

Functionality, Services and Tools	Cloud
Add logic to forms and editable grids without code	
Automatically perform calculations and build aggregations on dates, numbers or text	
Dynamics automation with a built-in workflow engine	
Process dialog guided page by page user interface for data entry	
Cross technology automation with Power Automate	

Functionality, Services and Tools	Cloud
Empower your teams to win more contracts, optimize resource utilization, accelerate project delivery, and get business insights from sales to project financials with Project Operations	
Provide a web-based user interface for your Dynamics data for customer self service with Power Apps Portals	
Bring together transactional, behavioral, and demographic data in real time to create a 360- degree view of your customers with Customer Insights	

Functionality, Services and Tools	Cloud
Campaigns and Marketing Lists	
Lead to Opportunity tracking	
Opportunity Quote Order Invoice	
Customize the Opportunity Close dialog and the opportunity close entity	
Better understand your business relationships, evaluate your activities in relation to previous successes, and choose the best path forward with Sales Insights	
Connect LinkedIn data with Dynamics 365 Sales	
Native integration with social channels (Facebook, Twitter, LinkedIn) with the modern Dynamics 365 Marketing app	
Create seamless customer journeys to nurture leads and empower sales teams with the modern Dynamics 365 Marketing app	
Conduct high value campaigns, create targeted marketing lists and manage events with the modern Dynamics 365 Marketing app	

Functionality, Services and Tools	Cloud
New end user experience with enhanced UI	
Reduce customizations due to added functionality. (e.g., Field Service, Omnichannel)	
Reduce hardware upgrade costs and IT maintenance	
Platform flexibility and elasticity	
Built-in intrusion security, high availability and disaster recovery	
Mobile-ready and access anywhere with cross-platform UI support	
Seamless integration with productivity tools	

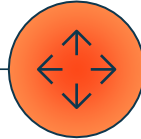


Security

Take advantage of Microsoft's

\$1 billion security investment and create robust security and access controls for apps and data with built features included in Dynamics 365 Finance & Supply Chain Management including:

- Physical data center, network connectivity, and service hosting platform
- Capabilities of Microsoft Azure
 - the built-in disaster recovery and 24/7 technical support to ensure cybersecurity



Flexibility

Gain benefits with monthly subscription model, including:

- Flexibility on operational cost vs capital costs
- Potential cost savings as you only buy what you need
- Elasticity to scale and grow based on needs



Reduce your IT Maintenance

Reduce costs on company's server maintenance, including:

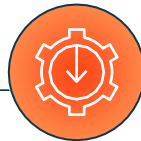
- Eliminate buying servers and required licenses supporting on-premise solution
- Avoid server room maintenance, monitor and update the underlying platform (*Windows, SQL Server*) and the application itself
- Reduce IT staff ERP system maintenance hours



Cross-platform support

Ensure seamless business operations from anywhere at any time through Dynamics 365 - powered by a native HTML5 browser-based user interface that:

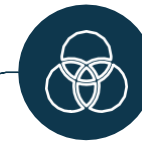
- Provides access on virtually any device (PC, tablet, phone) with any browser (IE, Chrome, Safari, Firefox, etc.) or platform (Windows, Mac, etc.)
- Removes need to rely on remote desktop or enterprise portals



Stay up-to-date with new functional enhancements

Take full advantage of Dynamics 365 evolving features and newest functionality:

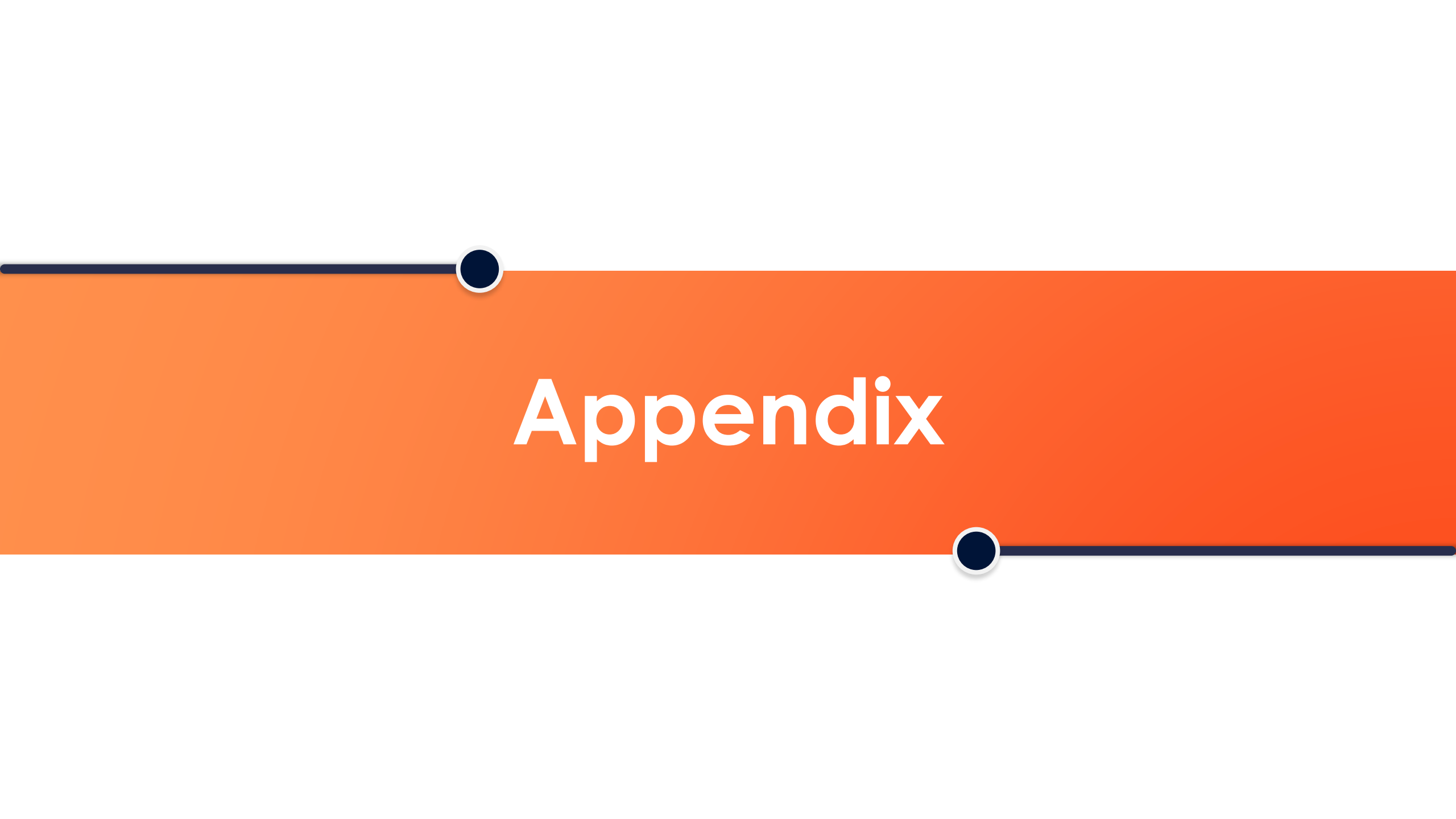
- Seamless application updates to all customers
- New Dynamics platform updates to improve performance and user experience



Native in-built modern ecosystem

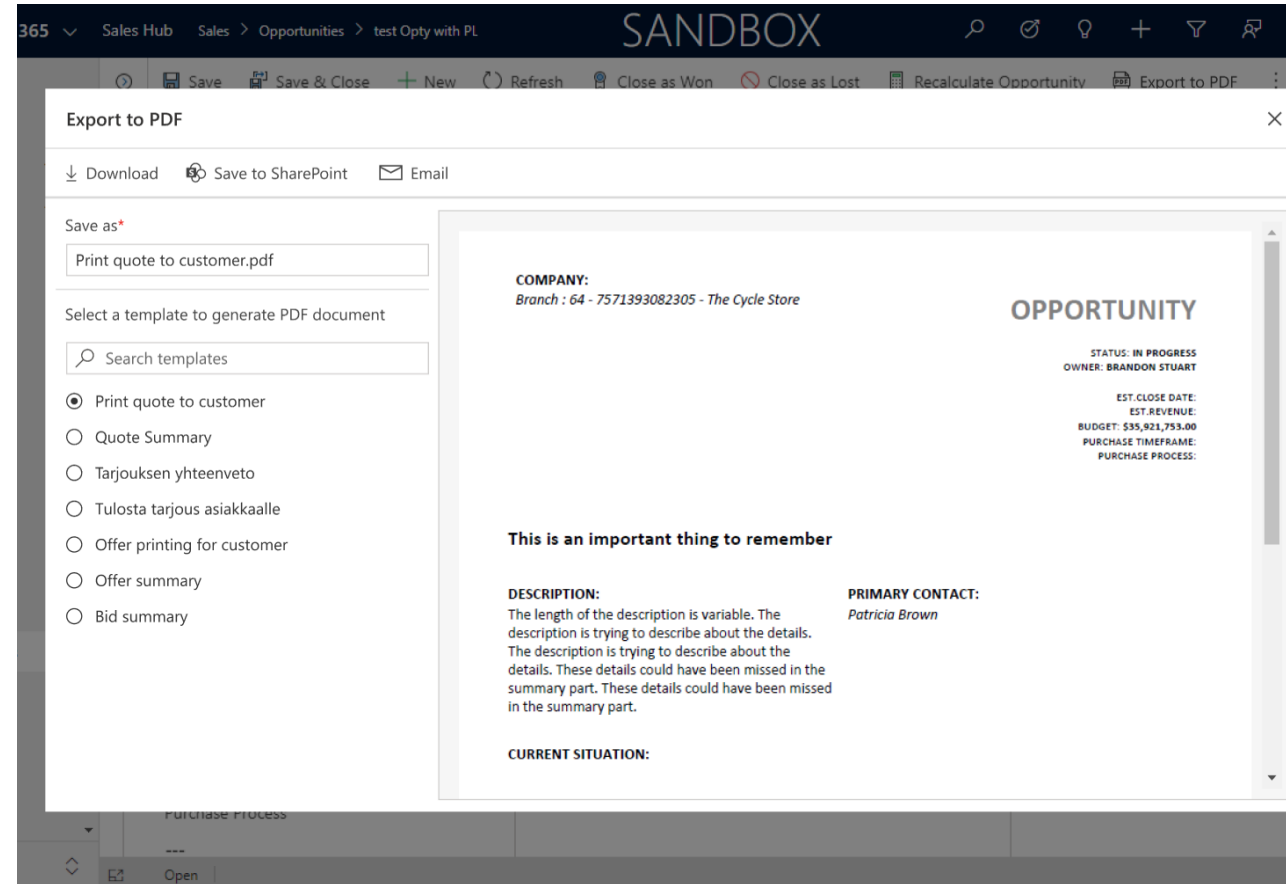
Seamless connections with Microsoft 365 apps, Power Platform apps and other external data sources in the industry:

- Native integration with Microsoft 365, Power BI, Teams, SharePoint, etc.
- Built-in connectors allow interaction with data in Adobe, Salesforce, Facebook, and SAP for example
- Configure business processes quickly with tools like Power Apps, Power Virtual Agents and Power Automate

The slide features a central orange rectangular band. The word "Appendix" is written in white, bold, sans-serif font in the center of this band. Two dark blue horizontal lines extend from the left and right edges of the slide, passing behind the orange band. Each line has a small dark blue circle with a white outline positioned on it: one on the top line to the left of the orange band, and one on the bottom line to the right of the orange band.

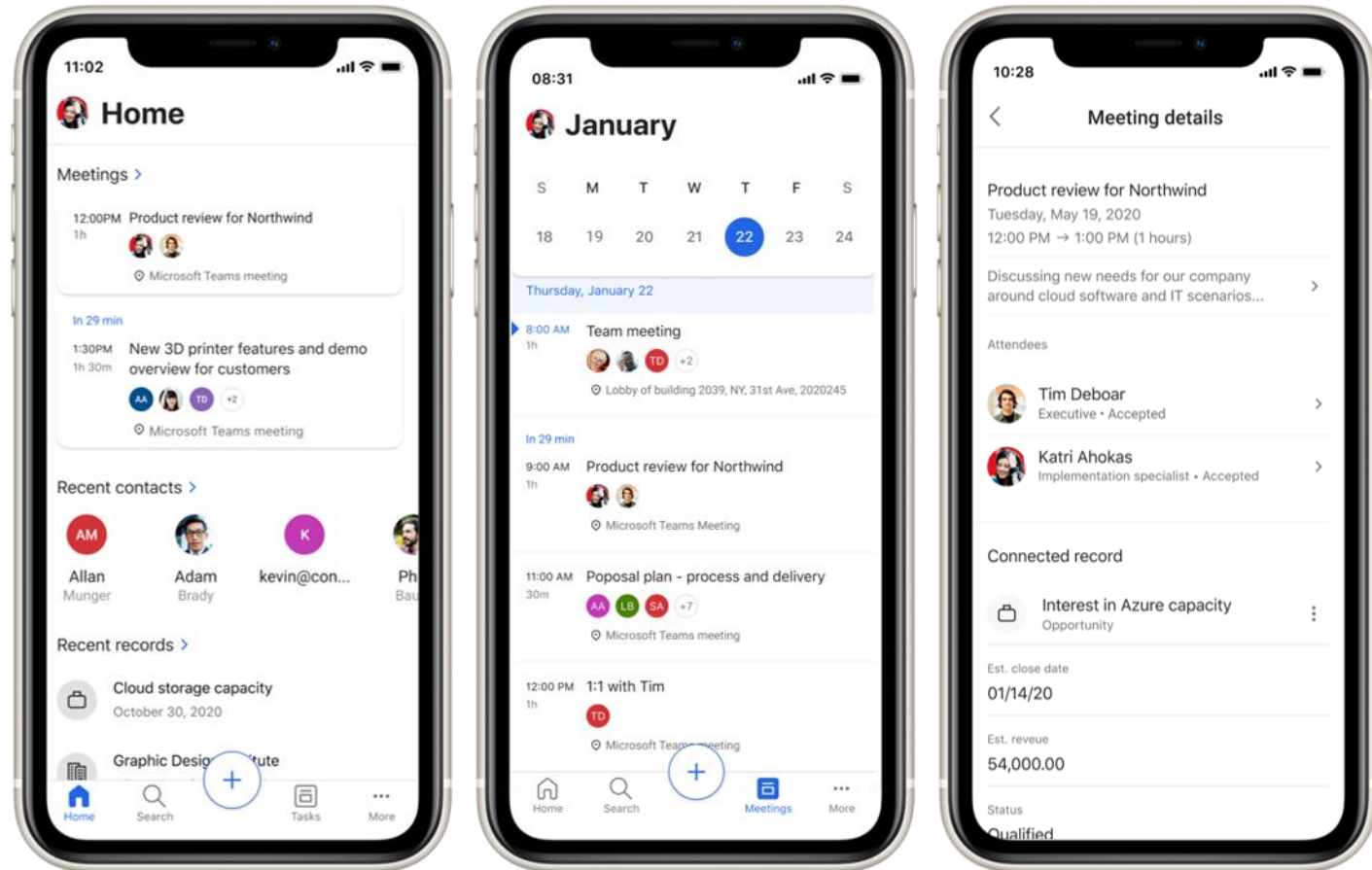
Appendix

- **New mobile app**
 - ✓ Remain productive anywhere, anytime with native experiences optimized for the seller's daily tasks
- **Easily generate PDF documents**
 - ✓ Optimized experienced for PDF document generation, along with custom entity support
- **Streamlined email experience**
 - ✓ Reply or forward an email from the record timeline and send emails with an improved file attachment experience
- **Simplified duplicate detection & merge experience**
 - ✓ Improved user experience for detecting and avoiding duplicate data entry
- **Generate orders from quotes**
 - ✓ Streamlined experience of generating orders from quotes



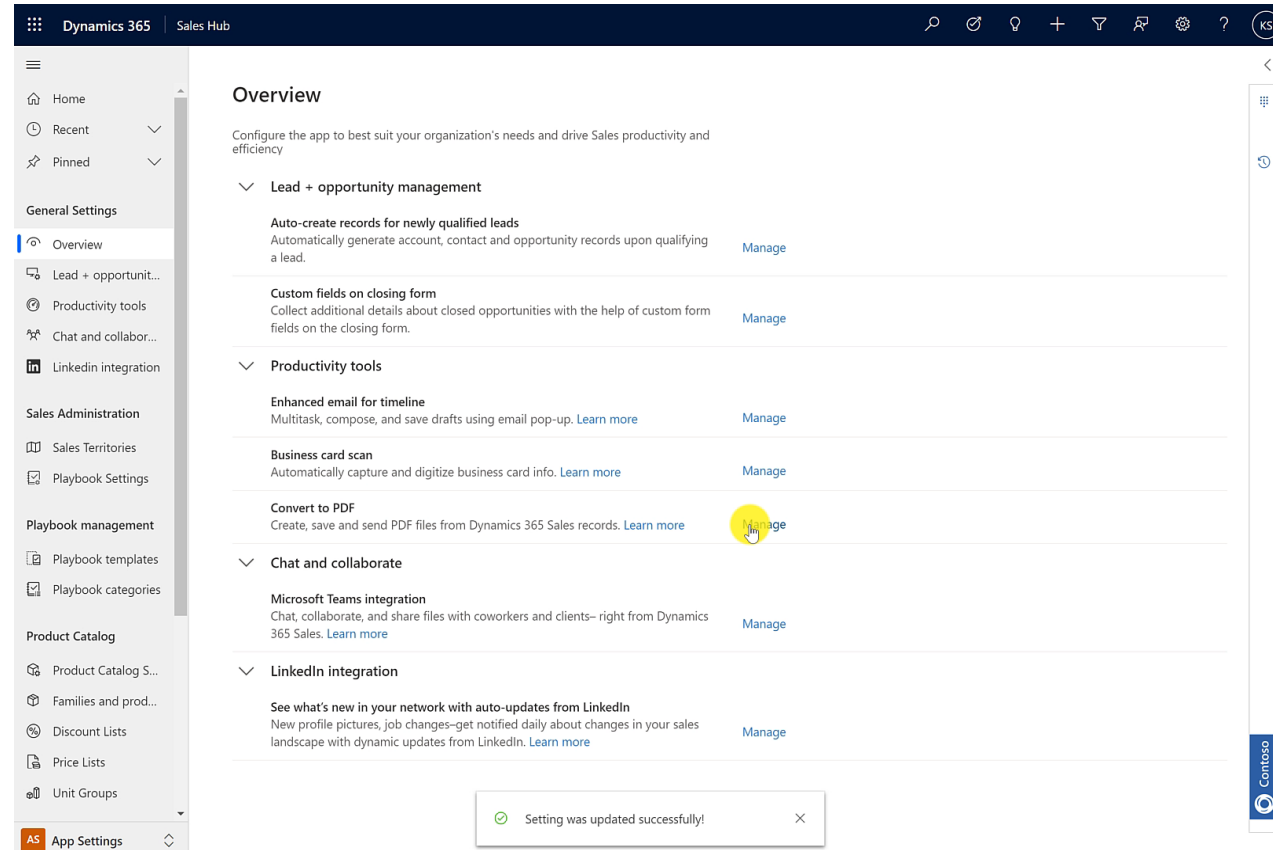
Stay productive anywhere, anytime

- Start your day with easy access to upcoming customer meetings, related records, and make relevant updates in seconds
- Type or dictate notes with the touch of a button
- Quickly access and update accounts, contact, and opportunities
- Find relevant data quickly with search suggestions, search as you type, and helpful search result grouping



Simplify your document workflows with enhanced PDF capabilities

- Conveniently manage entities for enabling/disabling PDF document generation with enhanced admin experience
- Generate standardized PDF files for custom entities
- Get an enhanced PDF generation experience with
 - Simplified navigation 'Export to PDF' command with export and email options
 - Easy document template selection
 - Document preview



- Send emails more quickly with a streamlined experience
- Consistent email experience from timeline
- New enhanced email form with improved attachment experience
 - Inline file attachment experience with the ability to manage multiple files
 - Quick preview for files
 - Ability to select and manage multiple attached files

The screenshot displays the Microsoft Dynamics 365 Sales Hub interface for the account 'A. Datum'. The left sidebar shows navigation options like 'Open Leads', 'Pinned', 'My Work', 'Auto capture (preview)', 'Customers', 'Sales', and 'Collateral'. The main content area is divided into several sections:

- ACCOUNT INFORMATION:** Displays fields for Account Name (A. Datum), Phone (09565685656), Fax (35845949565), Website (https://www.bing.com), Parent Account (A. Datum Corporation (sample)), and Ticker Symbol (MSFT).
- ADDRESS:** Shows the address 410 Terry Ave N.
- Timeline:** A central section showing a list of activities and tasks, including 'Task modified by Kenny Smith', 'Email from Kenny Smith', 'Task completed by Kenny Smith', 'Task modified by Kenny Smith', 'Post by Kenny Smith', 'Note modified by Kenny Smith', and 'Email from Kenny Smith'.
- Assistant:** A section on the right with a message: 'No notifications or suggestions. Check back later to see what's new and stay up to date.'
- CONTACTS:** A list of contacts including Eva Elznicova, Rene Valdes, Susanne Schustin, Tom O'Neill, and Vincent Lauriant.
- RECENT OPPORTUNITIES:** A section at the bottom right showing recent opportunities.

The top navigation bar includes options like 'Save', 'Save & Close', 'New', 'Open Org Chart', 'Deactivate', 'Connect', 'Add to Marketing List', 'Assign', and 'Email a Link'.

- **Maintain clean customer data with improved duplicate detection and merge experience**
- View relevant information in the duplicate warning prompt
- Merge records without navigating away from the duplicate warning prompt
- Improved multi-entity duplicate prompt (lead qualify scenario)

The screenshot displays the Microsoft Dynamics 365 Sales Hub interface. The top navigation bar shows the path: Dynamics 365 > Sales Hub > Sales > Contacts > Ronak Gupta. The left sidebar contains a navigation menu with options like Home, Recent, Pinned, My Work, Sales accelerator (pr...), Dashboards, Activities, Auto capture (preview), Activity suggestions, Contact suggestions, Customers, Accounts, Contacts (selected), Sales, Leads, and Opportunities. The main content area shows the contact record for Ronak Gupta, with tabs for Summary, Details, Files, LinkedIn Sales Navigator, and Related. The Summary tab is active, displaying contact information such as First Name (Ronak), Last Name (Gupta), Job Title (Mgr), Account Name (Branch : 0 - 7568541706181 - Blue Bicycl...), Email (ronakgupta@microsoft.com), Business Phone, and Mobile Phone. There are also sections for Timeline, Talking points, Company, and Assistant, each with a message indicating that the record hasn't been created yet.

Ram Agarwal

Founder & Managing Partner

M: +91 93240 22233

Email: ram@rama.co.in

Manish Patil

VP – Strategy & Consulting (IT & ERP)

M: +91 98909 72111

Email: manish.patil@rama.co.in

Menka Yadav

Sales Manager – (IT & ERP)

M: +91 87795 58025

Email: menka.yadav@rama.co.in



Mumbai H.O. –

Unit 607 & 512, A Wing, Express Zone, Western Express
Highway, VIT Bhatti, Malad East, Mumbai- 400097



Hyderabad Branch Office –

Cowork Zone, 4th Floor, Cabin No:7, Opposite Lane of
Harley Davidson Showroom, Madhapur, Kavuri Hills,
Hyderabad - 500033



Dubai Office- RAMA LLC

M-01, Bank Street Building, Khaled Bin Waleed Road,
Dubai, UAE

OUR PRESENCE: KSA- BAHRAIN

Phone: 022 4960 2734 / 022 4960 9734

Visit us at: www.ramaerp.in/ www.rama.co.in

Email: info@rama.co.in

