

Microsoft Dynamics CRM Customization Solution

Project:

Dynamics CRM
Customization

Business Industry:
Refrigeration Systems

Duration:
12 man months

Technology:
Microsoft Dynamics CRM
2011, 2013

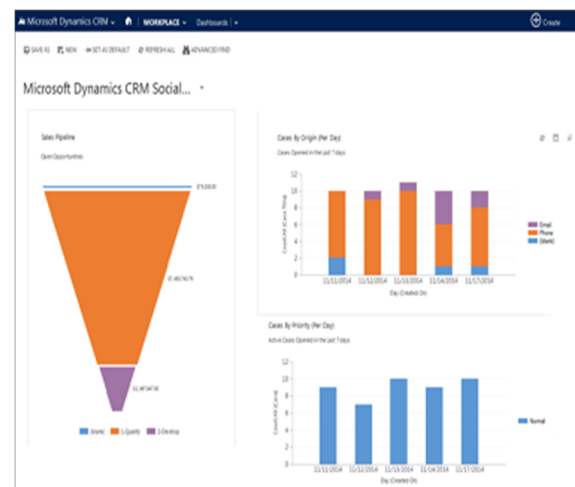
Problem Background

The client is a provider of different kinds of commercial refrigeration systems and in business for more than 30 years. The client has a global customer base. To improve relationships with customers, automating sales and service processes, tracking task and events, centralizing customer data, and for boosting sales and marketing the customer wanted to use Microsoft Dynamics CRM platform. But out of the box Microsoft Dynamics CRM platform doesn't provide much flexibility and scalability. For business functions/activities like creating custom contracts, relating order and incidents, managing shipments and product costs etc. the client did not have features available in native Dynamics CRM platform.

TechPerspect's Solution

TechPerspect provided a customized solution that could run on top of Dynamics CRM platform. The solution includes the following features:

- Customized sales business process flow from qualifying lead to contracts creation
- Creation of connections between accounts, opportunities and contacts
- Custom reports for quotation, contract, freight & warranty claims
- Managing product shipments, freight costs and calculating profits



Solution Features

- Customized sales, service & marketing business process flow
- Centralized customer data
- Quick contract, quotation creation
- Role based security for CRM users
- Real time opportunity, revenues overview
- Easy event and tasks management
- Ability to create financial profiles about customers
- Customer segmentation

Business Impact

- Reduced costs & increased output from shorter and more efficient processes
- Quick sharing and filtering of data
- Improved reporting and analytics
- Improved collaboration within sales and customer service teams
- Increased customer retention and loyalty
- 360-degree view of customers

Client Speaks

"The customizations done by the TechPerspect team has helped us to use the Dynamics CRM platform in line with our business rules and processes. TechPerspect's solution has helped in increasing process efficiency."

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