

Microsoft Dynamics CRM Customization Solution

Project:
Microsoft Dynamics CRM Customization

Business Industry:
Refrigeration Systems

Duration:
12 man months

Technology:
Microsoft Dynamics CRM 2011, 2013

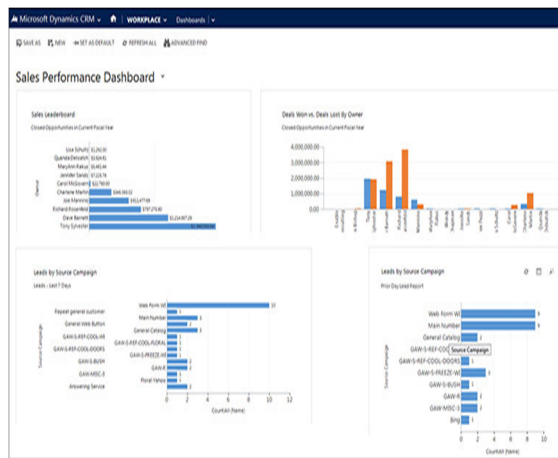
Problem Background

The client is a provider of different kinds of commercial refrigeration and freezer systems and in business for more than 30 years. The client had 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 and quotations, and shipments, calculation profit with custom formulas, quick incidents resolving 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 lead creation to order shipments
- Linking campaign with accounts, contacts and Opportunities
- Custom reports invoices, incidents claim etc.
- Custom profit, tax calculations implementation
- Custom visual charts and dashboards



Solution Features

- Customized sales and service cycle
- Integration with tools to capture data, leads etc.
- Quick contract, quotation, incident report creation
- Role based security for CRM users
- Easy working with existing and write in products
- Efficient product catalog price management
- Customized costs calculations logic for opportunities, quotes and orders
- Easy management of account, contacts and opportunities

Business Impact

- Reduced costs & increased output from shorter and more efficient processes.
- Easy sales and service performance management.
- Improved reports and dashboards.
- 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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