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intelegain
TECHNOLOGIES

Dynamics 365

Sales CRM Case Studies

Shortline Moving Solutions Inc, Canada

❓ The **Problem**

➤ Shortline, a storage and transportation company in Canada, faced challenges in managing their sales processes efficiently.

➤ Opportunities were created in custom quote creation tool which need to be integrated with CRM

💡 The Solution

➤ Implemented Dynamics 365 CRM for Sales to streamline the sales processes of Shortline

➤ Customized the Dynamics 365 Sales solution to cater to the specific needs of the company.

➤ Implemented real time integration of custom web-based quote creation tool with Dynamics 365 Sales for auto creation of Opportunities for further processing.

Clariness GmbH, Germany

? The Problem

➤ Clariness, a Germany-based Pharma company, faced challenges in managing their sales and marketing processes effectively.

➤ The existing system did not provide the necessary tools and functionalities to manage email campaigns and optimize sales opportunities.

The Solution

➤ Implemented Dynamics 365 Sales CRM and Marketing CRM to address the sales and marketing needs of Clariness.

➤ Implemented forms, views, and dashboards in Dynamics 365 Sales CRM to streamline sales activities and provide a clear view of customer data.

➤ Configured lead and opportunity management features to efficiently manage and track sales opportunities throughout the sales pipeline.
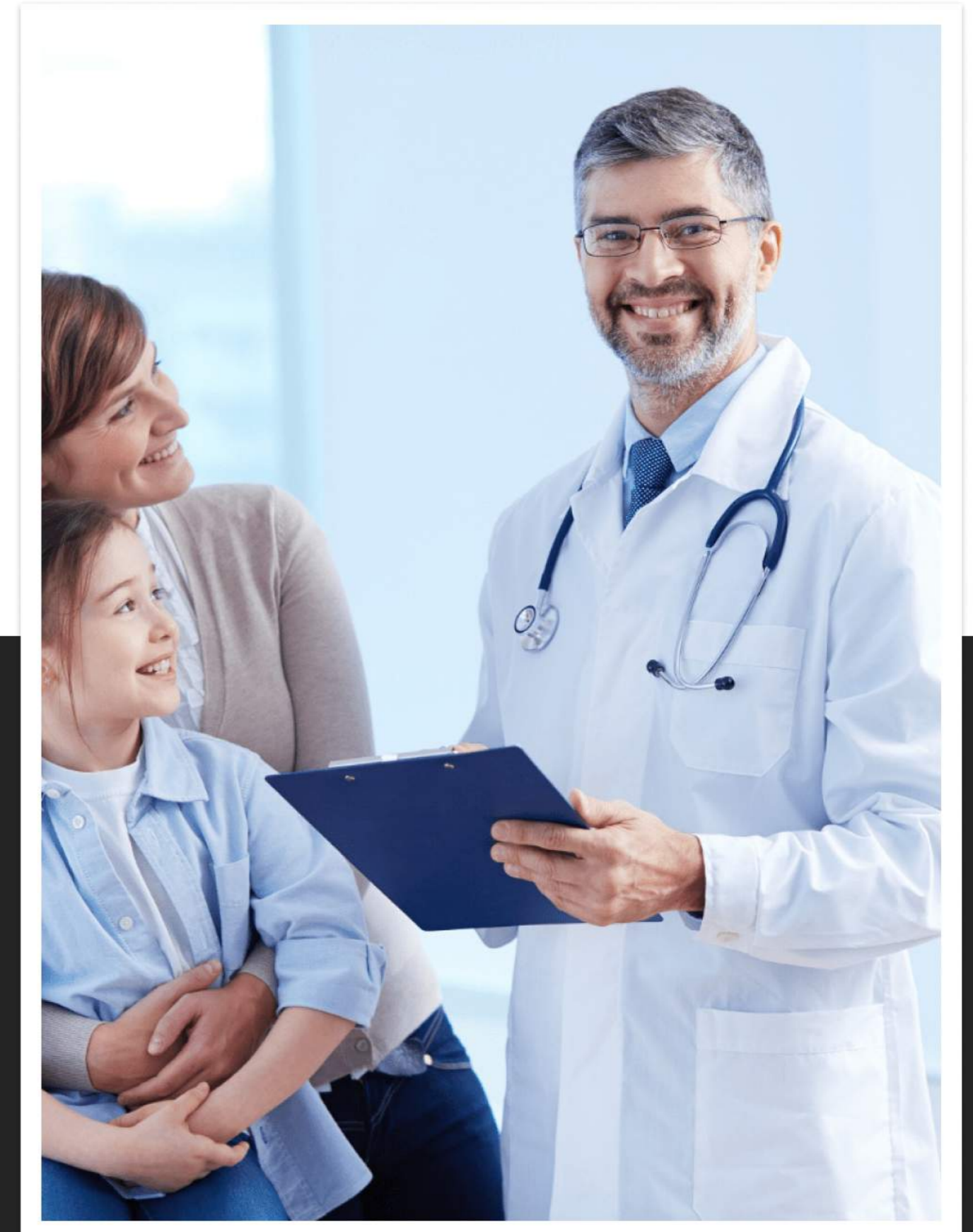
BE C&I Solutions Holding Pte. Ltd, Singapore

? The Problem

➤ Lack of effective management and tracking of critical sales activities.

➤ Delayed responses, missed opportunities, and potential customer dissatisfaction.

The Solution

➤ Implementation of Dynamics 365 Sales

➤ Configuration of notification workflows in Dynamics 365 Sales.

➤ Define triggers to initiate notification workflows.

➤ Establish escalation procedures for unresolved activities.
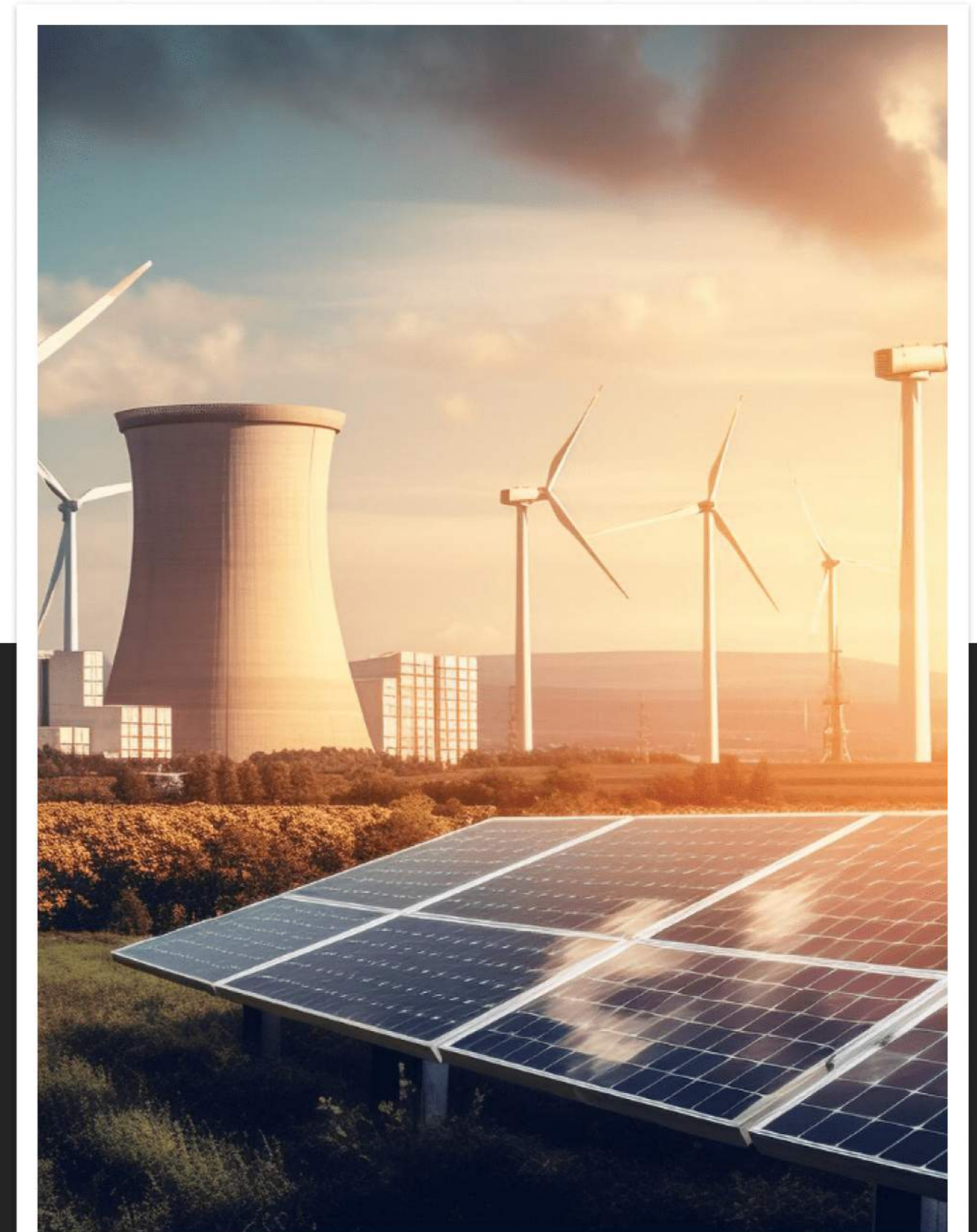
Tektronix, EMEA

❓ The **Problem**

➤ Upgrade from Adobe Marketo Engage to Dynamics 365 Sales to scale marketing activity

➤ Lack of a seamless customer experience through marketing automation

💡 The Solution

➤ Provisioning of support for Migration activities from Adobe Marketo to Dynamics 365 Marketing

➤ Assisting in setting up event pages and lead capture forms, Including automated email campaigns.

➤ Provisioning of certified experts for system customization and configuration, testing and deployment
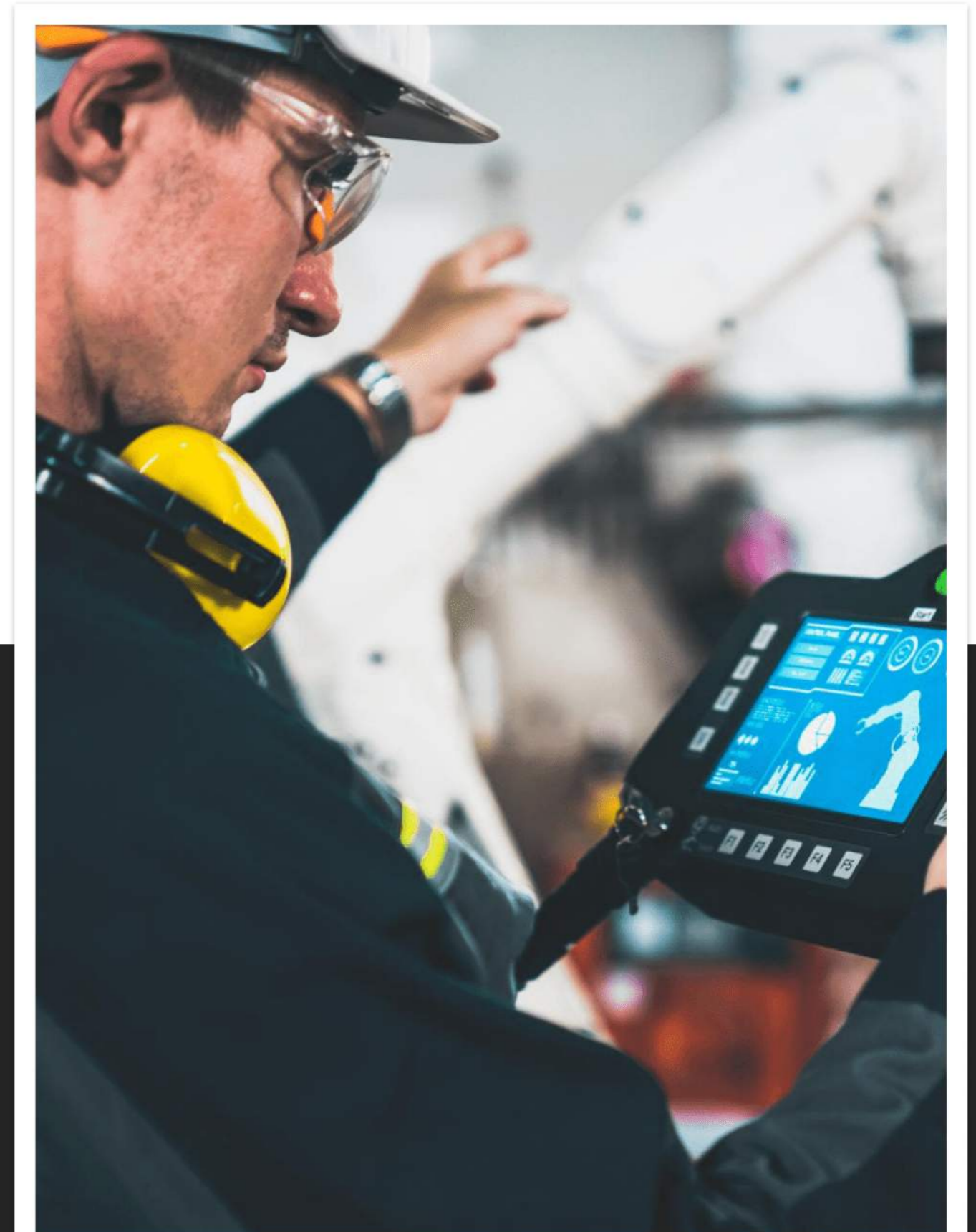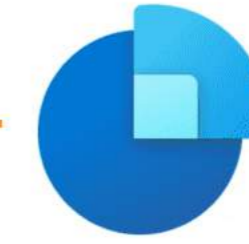
Switch Connect, Australia

❓ The **Problem**

➤ Ineffectiveness in managing opportunities within Dynamics 365 Sales CRM.

➤ The quote template does not meet the requirements of the business team.

➤ Disorganized tasks and activities.

💡 The Solution

➤ Customised existing Dynamics 365 CRM setup by enhancing opportunity tracking with customized fields, views and dashboards.

➤ Optimize task and activity management with reminders, notifications, and task assignment rules.

➤ Customised quotation feature as per business needs.

Cyviz, Global

❓ The **Problem**

➤ Lack of expertise internal in managing Dynamics 365 Marketing & Dynamics 365 Sales.

➤ Challenges in aligning system configuration with business requirements.

➤ Difficulty in managing business processes and configuring administrative modules within the system.

💡 The Solution

➤ Provision of dedicated support for Dynamics 365 Marketing and Dynamics 365 Sales.

➤ Provision of assistance for user setup, role management, email integration, and email notification management.

➤ Provision of support in setting up business processes and configuring administrative modules in system.

➤ Assistance in marketing functions and general system maintenance.
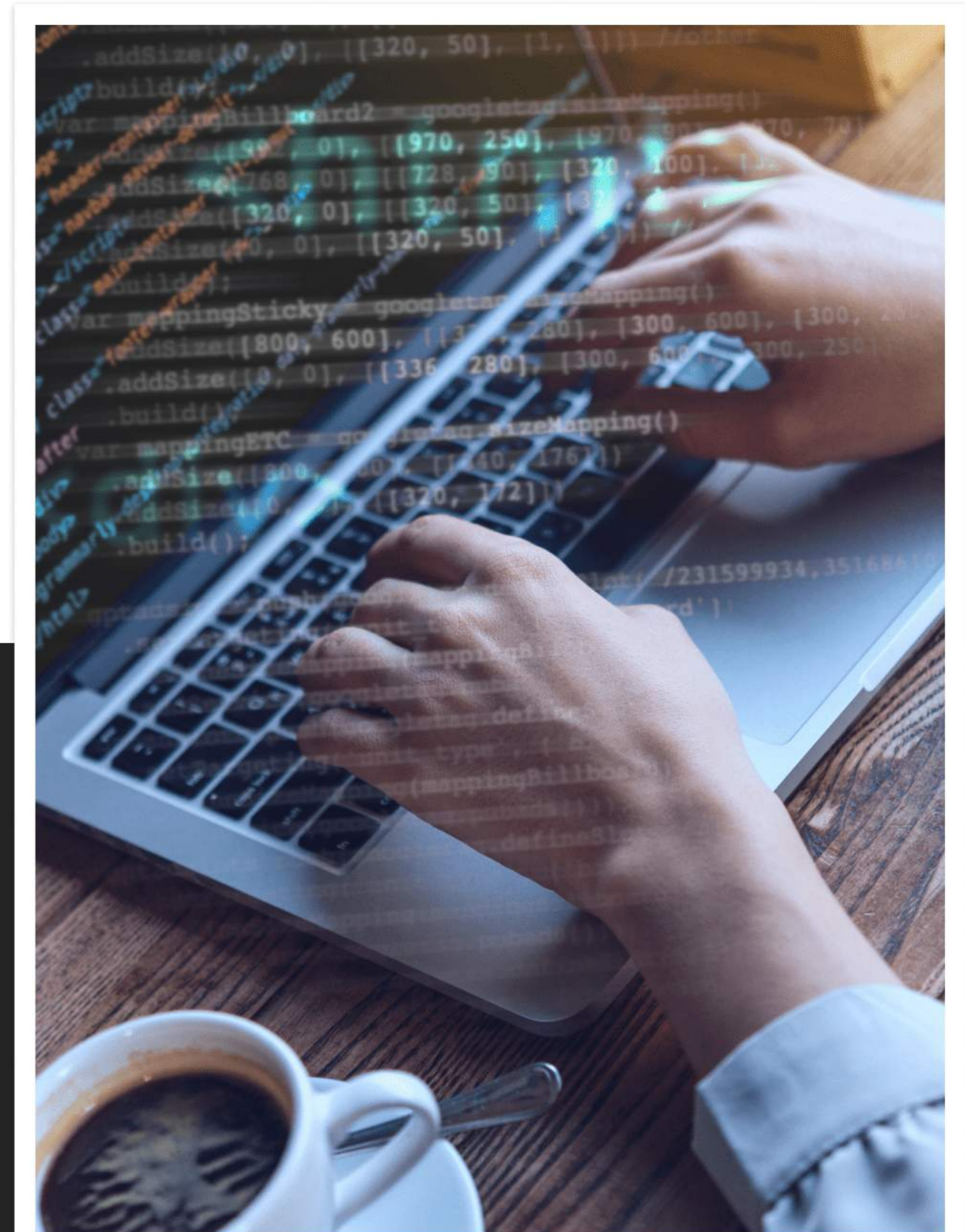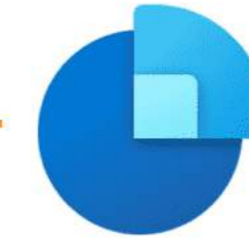
Baxter-Rutherford, United States

❓ The Problem

➤ Baxter-Rutherford, Inc. needed an ERP solution to automate their business processes and optimize resource utilization.

➤ Their unique sales processes, including representation contracts, consigned inventory, and buy/sell inventory, required customization in an ERP system.

The Solution

➤ Implemented Dynamics 365 Business Central as the comprehensive ERP solution.

➤ Customized the ERP solution to address the specific needs of Baxter-Rutherford, Inc.

➤ Created a specialized module to track sales as service commissions for representation contracts.

➤ Developed features to manage consigned inventory, including storage and order fulfillment.

Shortline Moving Solutions Inc, Canada

❓ The **Problem**

➤ Challenge in Supply Chain with large quantity items

➤ Un-organized RMA process

➤ Delayed decision making

💡 The Solution

➤ Improved bulk handling of serialized items, Advanced RMA Commission processing & SharePoint driven documentation management.

➤ Receive & Ship thousands of serialized items in minutes

➤ Comprehensive report on sale, purchase, warranty of returned items

**Microsoft Dynamics 365
Business Central**

# Trio Supply Chain Solutions, US

The Problem

➤ Fragmented systems that were causing inefficiencies within the business

➤ Staff was spending too much time on repetitive actions

➤ No real time visibility on revenues, sales numbers etc.

The Solution

➤ Implemented Dynamics 365 CRM for visibility on sales data and Business Central for process automation for company's accounting, supply chain and other business process.

➤ Real time integration of custom web-based quote creation tool with Dynamics 365 Sales for auto creation of opportunities for further processing.

Microsoft Dynamics 365 Business Central
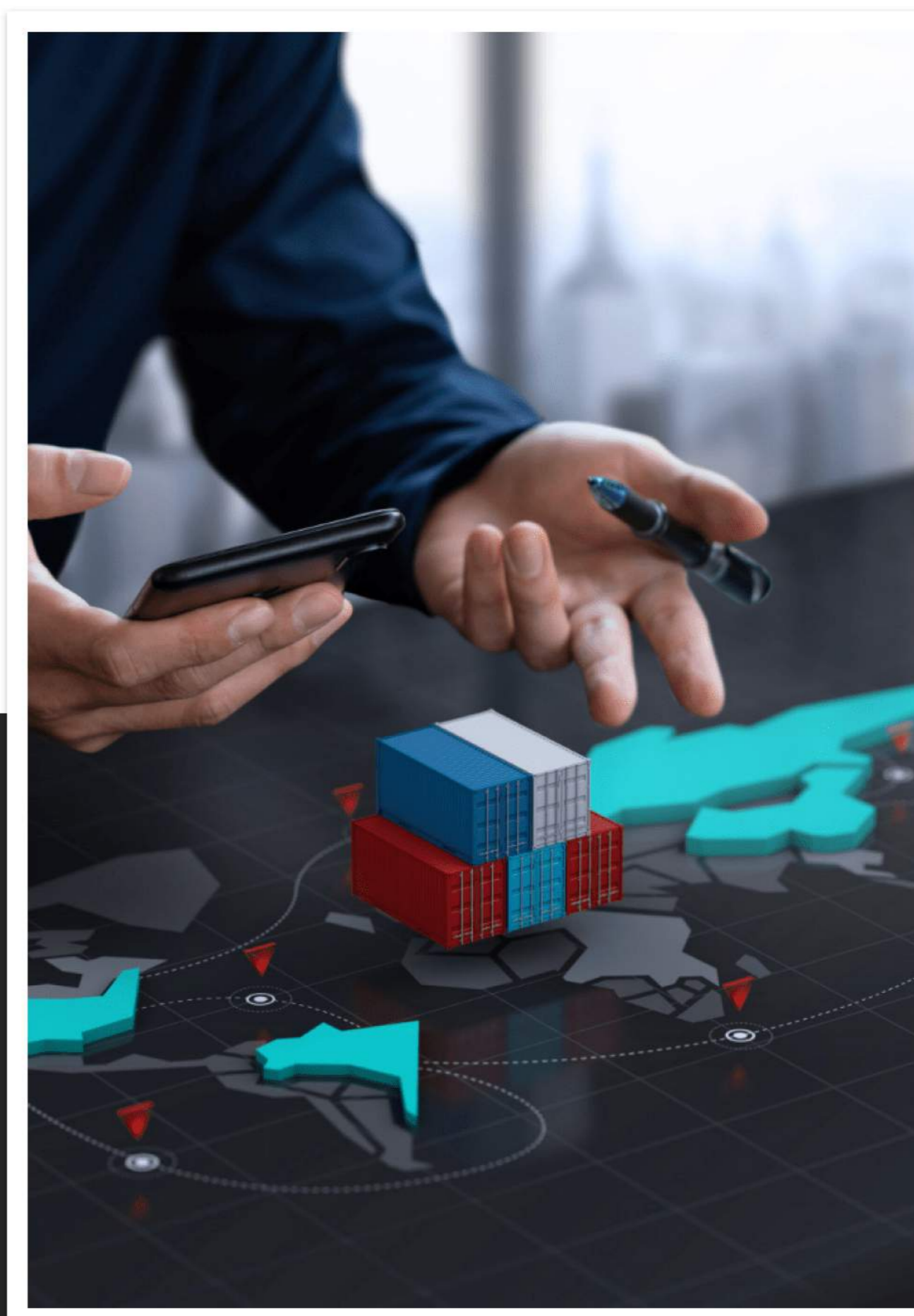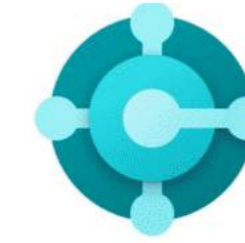
Lime Concepts, UAE

❓ The **Problem**

➤ Lacked a complete view of business which hampered decision making process

➤ Teams were working in Silos

➤ Fragmented systems that were causing inefficiencies within the business

💡 The Solution

➤ Implemented Dynamics 365 Business Central to integrate all departments functions on a single solution and streamline company's accounting, supply chain, inventory and other business process.

➤ Single and consolidated dashboards to top management and HOD's supports faster and informed decision making

مؤسسة عالم المذاقات
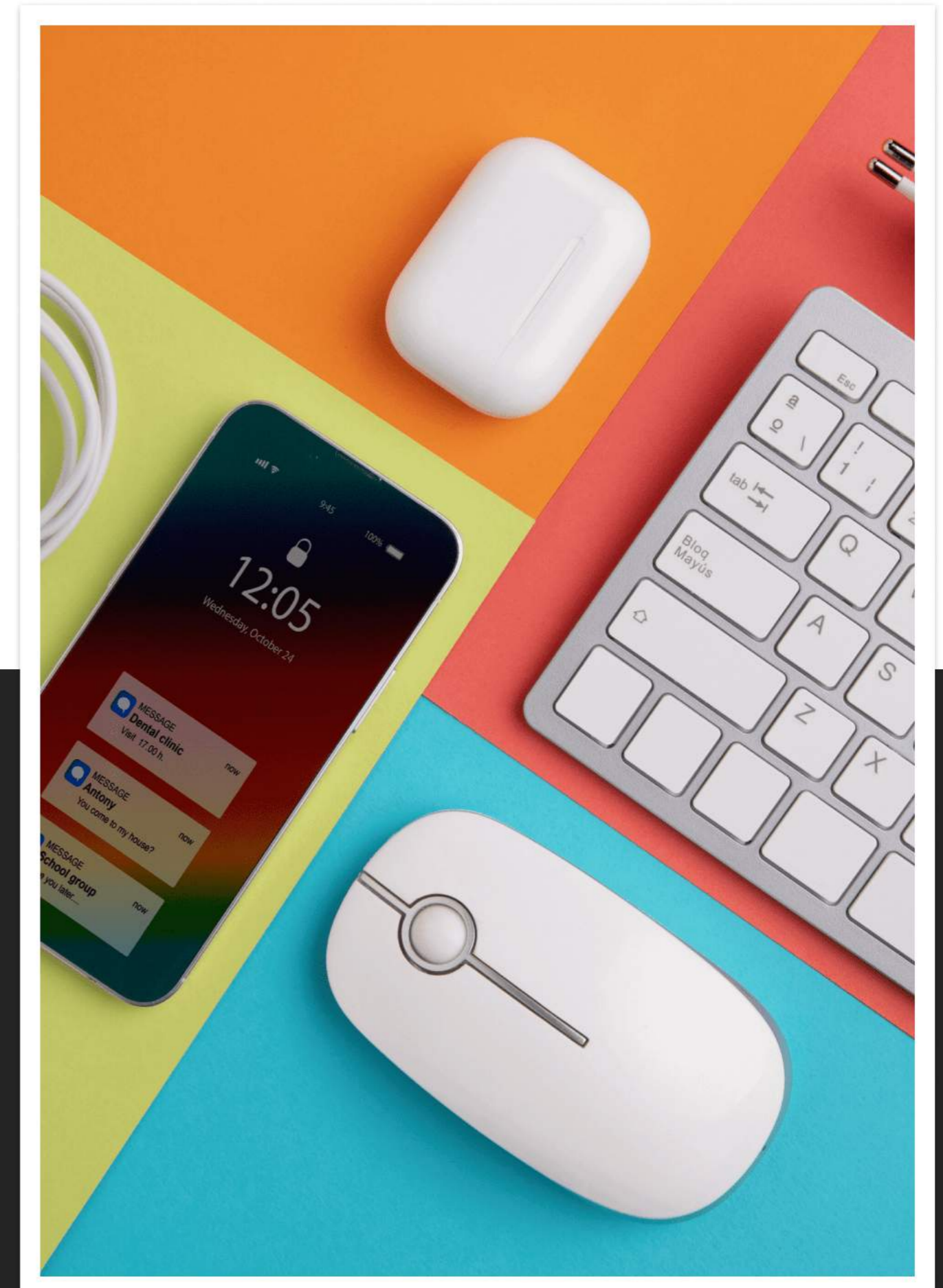
Alam AlMathaqat, Saudi Arabia

❓ The **Problem**

➤ Lacks a consolidated view of all financial transaction at head office and branches

➤ Difficult to manage raw materials & other items requirements for all branches

➤ No systems to consolidate sales revenue data across all branches

💡 The Solution

➤ Implemented Dynamics 365 Business Central helps the customer to consolidate all financial data in one systems from various branches.

➤ An advance supply systems in Business Central helps them to manage all inventories at warehouse and meet the branches requirements efficiently

WIO BANK,UAE

The **Problem**

➤ The company faced challenges in maintaining and supporting Dynamics 365 F&O.

➤ Lack of dedicated functional and technical expertise for maintenance and support.

➤ Difficulty in managing end-to-end enhancements and updates.

The Solution

➤ Intelegain provides maintenance and support services for Dynamics 365 F&O.

➤ Engages dedicated functional and technical experts for efficient support.

➤ Manages end-to-end enhancements and updates effectively.

BAGCORP, MEXICO

The Problem

➤ The company required maintenance and support for their Dynamics AX 2009 system but lacked a structured approach.

➤ The implementation of Dynamics 365 Finance and Operations needed professional support and guidance.

The Solution

➤ Intelegain offers ticket-based support for the maintenance of Dynamics AX 2009, providing timely assistance and resolving issues efficiently.

➤ Intelegain provides expert support for the implementation of Dynamics 365 Finance and Operations, ensuring a smooth and successful transition to the new system.

MAZARS, USA

❓ The **Problem**

➤ Mazars faced technical challenges in implementing Dynamics 365 F/O for their customers implementations

➤ The ongoing implementation of Dynamics 365 Operations required an extended team to work in collaboration.

💡 The Solution

➤ Provided technical support for Dynamics 365 F/O implementation.

➤ Engaged dedicated functional and technical experts for implementing Dynamics 365 F/O across domains.

➤ Supported customization of Dynamics 365 Finance and tested implemented functionalities.
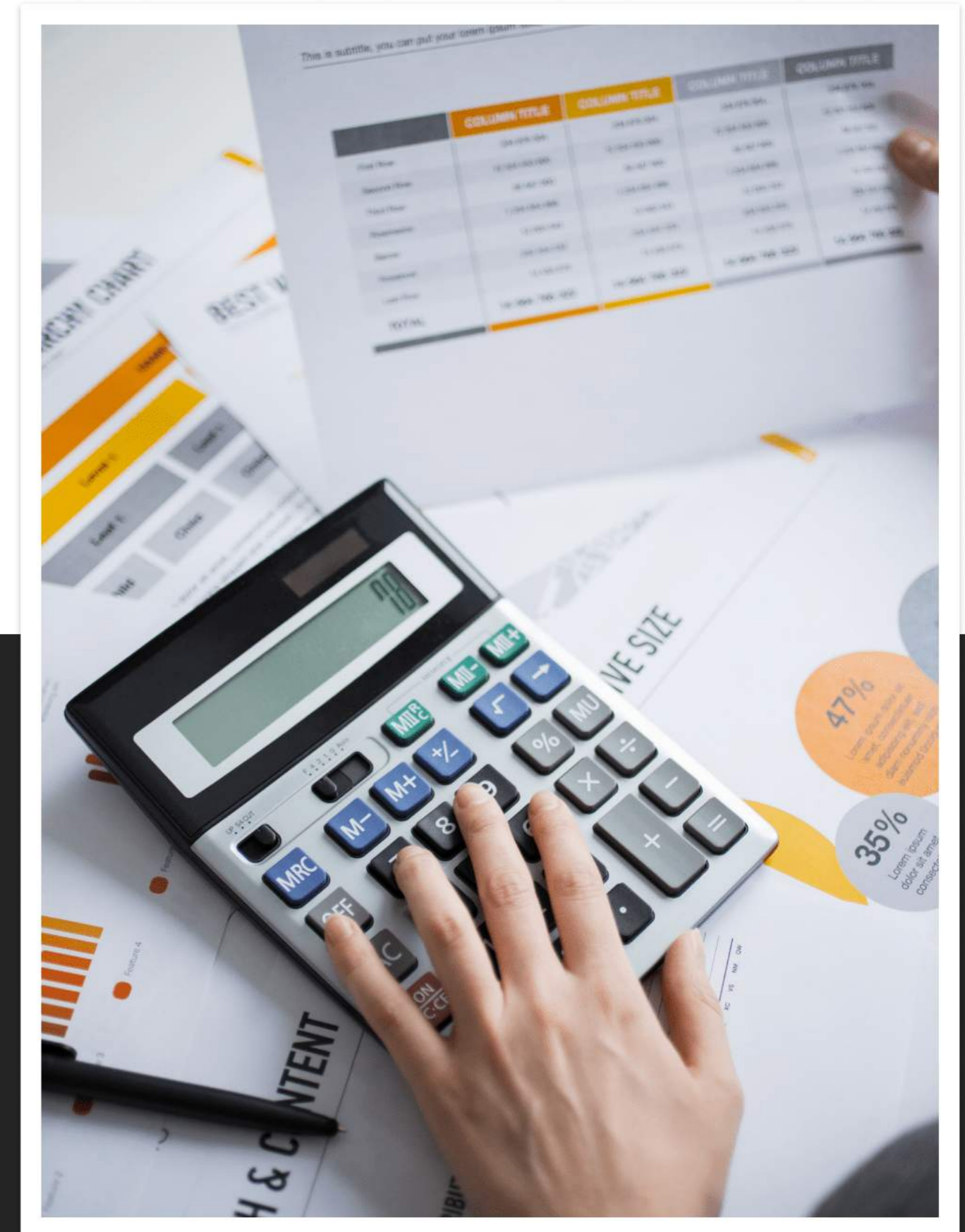
QUALPRO, CANADA

? The Problem

➤ The company and their customers were facing challenges in maintaining Dynamics AX 2009.

➤ Re-implementation of Dynamics 365 Operations required dedicated functional and technical Experts.

The Solution

➤ Thorough maintenance of the IHRP student portal to ensure its smooth functioning.

➤ Timely addressing of change requests specific to the IHRP student Portal to improve its functionality.
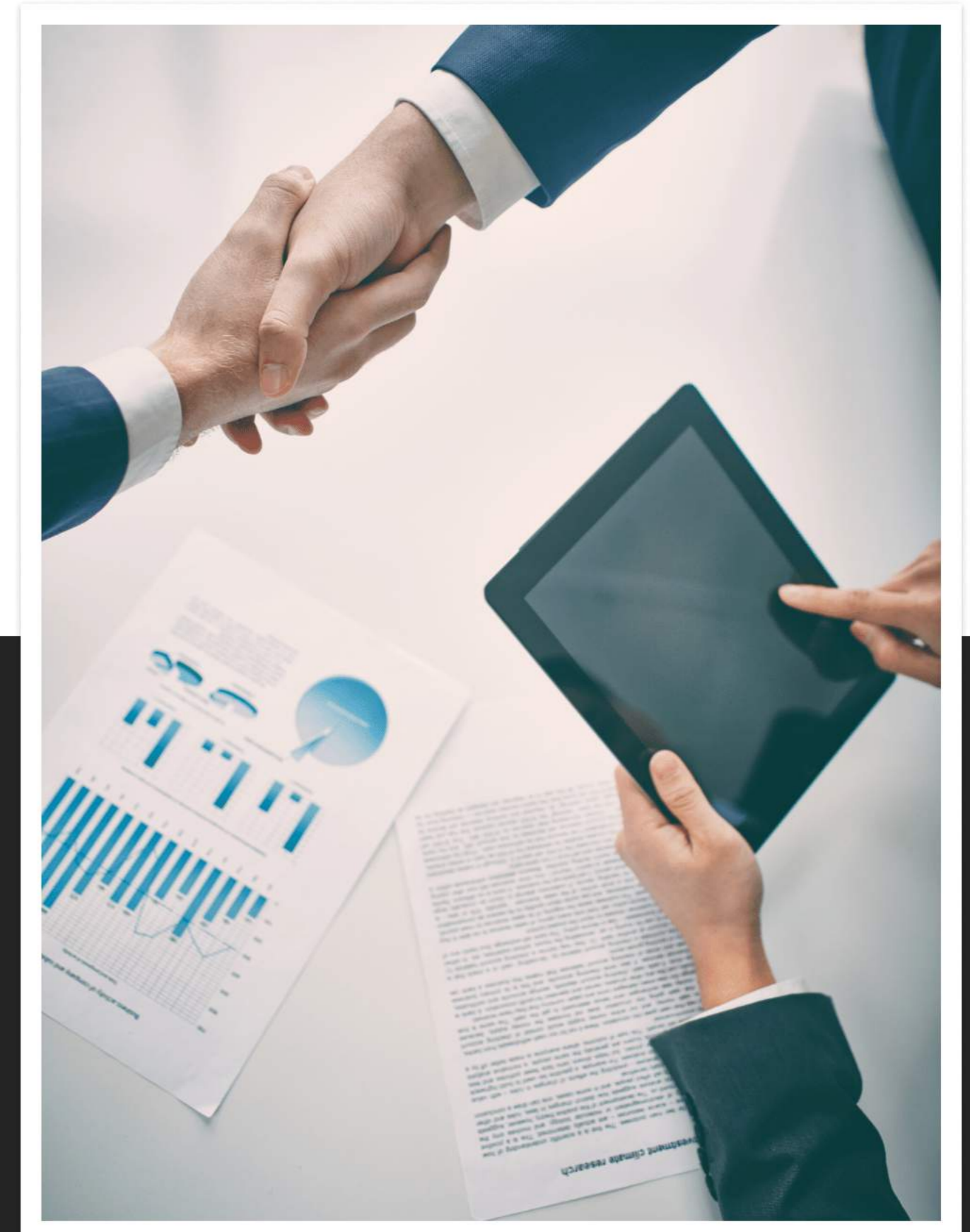
# Dynamics 365

Power Apps Case Studies

adsugar

PowerApps

Adsugar, Inc. USA

❓ The **Problem**

➤ Manual data collection process from various departments creates errors

➤ Lack of consolidated data for comprehensive analysis.

➤ Insufficient lead generation impact revenue

💡 The Solution

➤ Developed an App using PowerApps, Power Automate and PDF plugins.

➤ RPA process of collecting information from the respective departments.

➤ Consolidation of data into a single report.

➤ Generating leads for legal companies
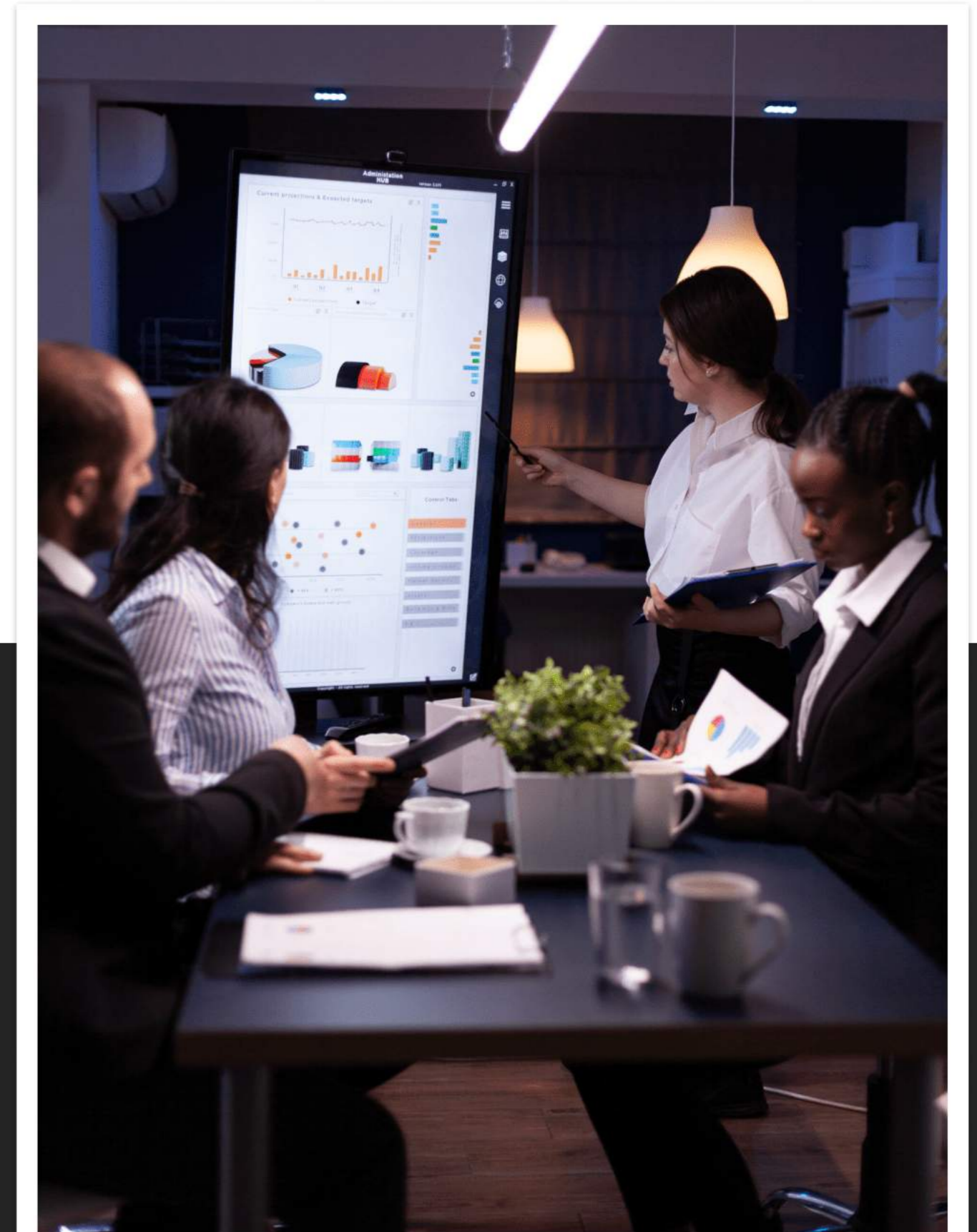
S M Technologies, USA

? The **Problem**

➤ Lack of visibility for customers on their data

➤ Manual sharing of information related to customer orders, inventory, invoices, dispatches, and shipments.

➤ Inconvenient order placement process for customers.

💡 The Solution

➤ Developed a customer-facing portal using PowerApps portal and Power Automate and a backend power Apps application integrated with CRM to pull customer data and manage admin activities

➤ Sharing real-time information on the portal regarding customer orders, available inventory, pending invoices, dispatch tracking, and shipment details.
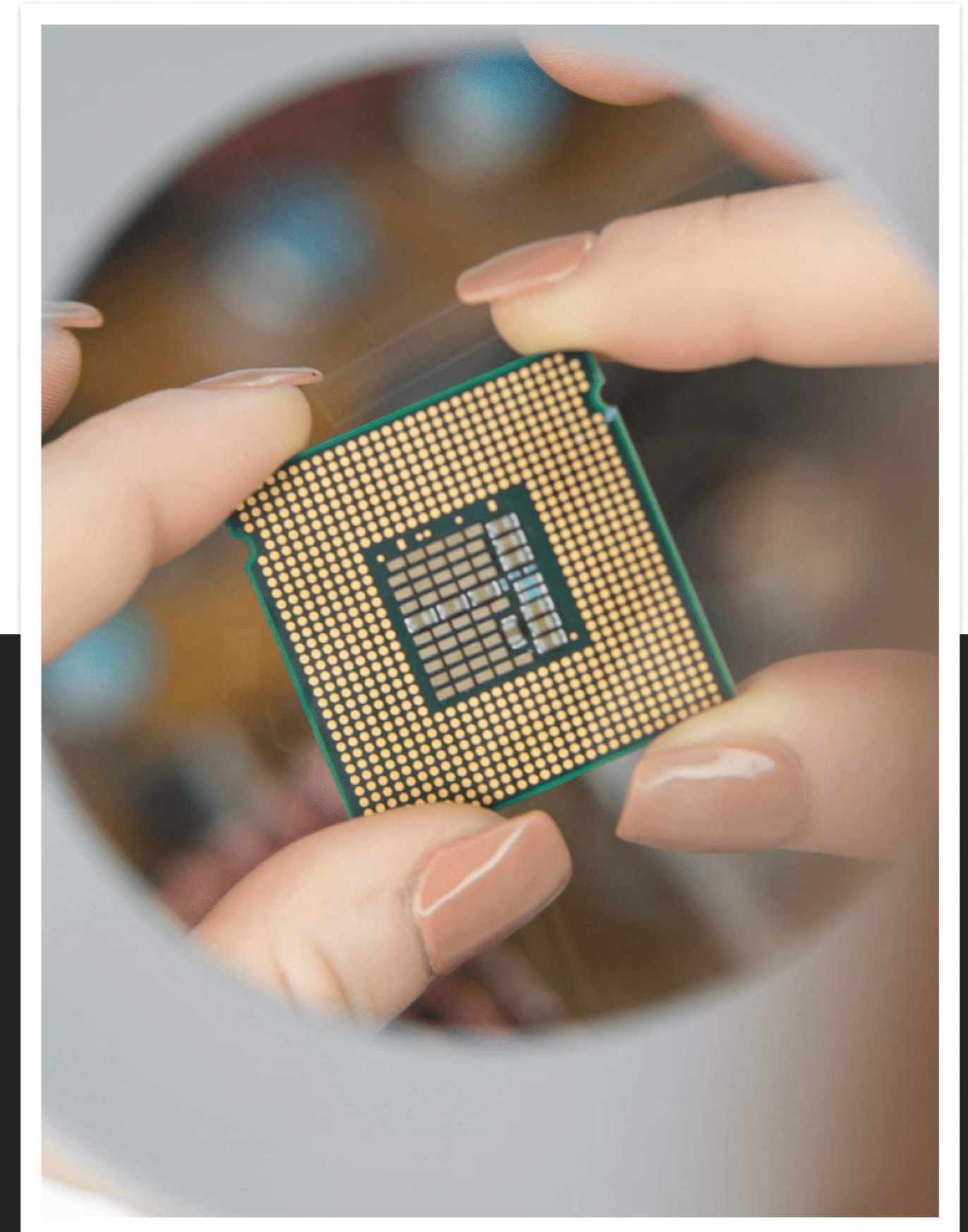
Eastmount Capital, USA

❓ The Problem

➤ Manual downloading and storing data from Yahoo Finance App causing inefficiencies in data processing.

➤ Manual data analysis due to lack of automated algorithms for data transfer,

➤ Manual generating reports.

💡 The Solution

➤ Implemented Power Automate to automate the transfer of data from Yahoo Finance App to Dataverse, reducing manual effort and improving efficiency.

➤ Developed PowerApps based canvas apps as a user-friendly front-end interface, enabling easy access and manipulation of data for investment management purposes.

Wonderchef, India

❓ The **Problem**

➤ Lack of comprehensive reporting capabilities to effectively visualize and understand data for decision making.

➤ Difficulty in consolidating data from multiple sources.

💡 The Solution

➤ Built Power BI reports with Microsoft NAV as the datasource to provide a holistic view of business data.

➤ Developed various reports that present data in a new and insightful way, enabling Wonderchef to gain valuable insights.

CarClarity

PowerApps

Car Clarity, Australia

The **Problem**

➤ Lack of automation to handle loan and insurance process decrease productivity.

➤ Non-availability of required reports impact decision making process

➤ Manual data entry in application form creates errors.

The Solution

➤ Developed a PowerApps-based customized CRM for loan and insurance process.

➤ Developed necessary reports for informed decision making.

➤ Build workflow to update the field on the application form.
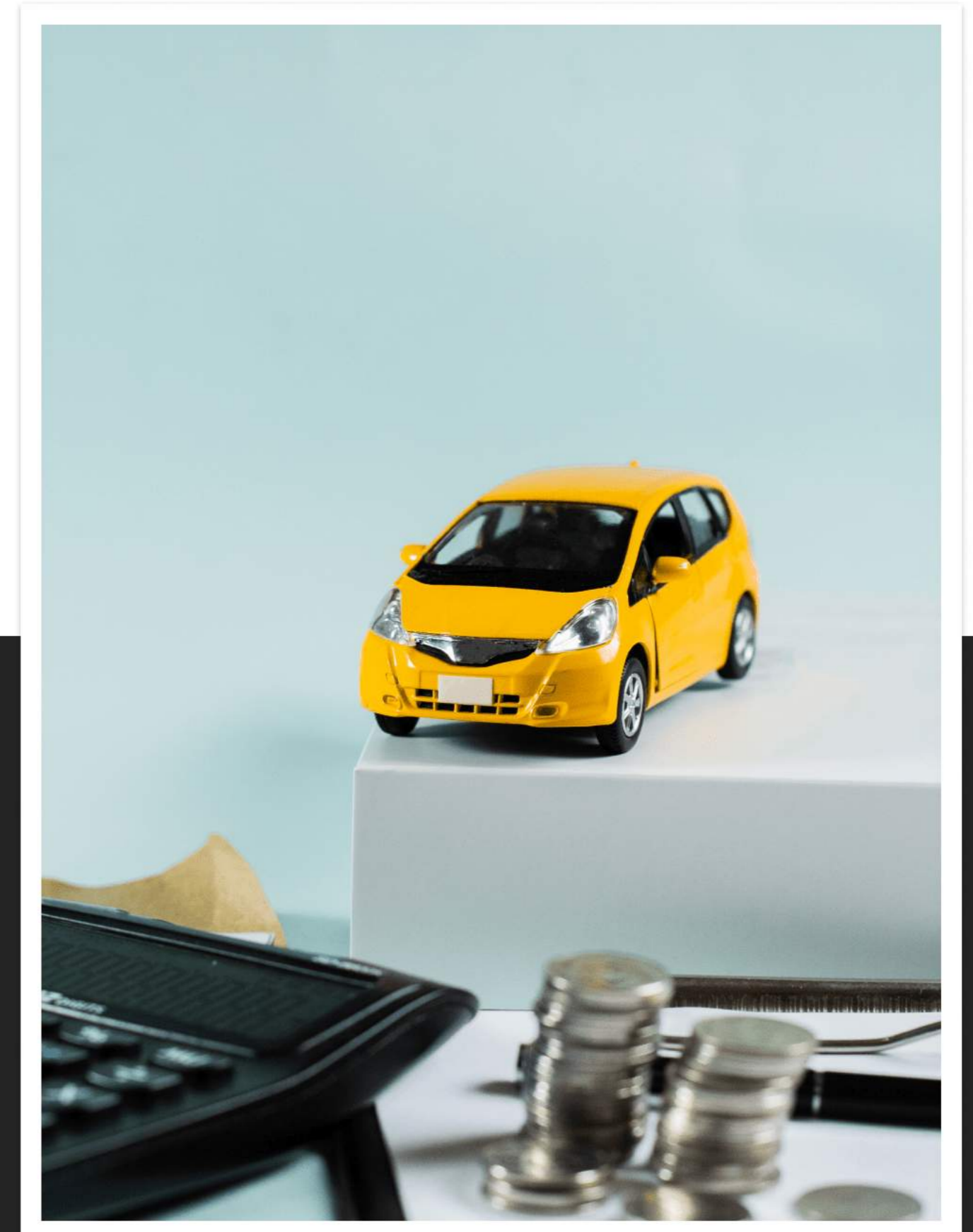
Dynamics 365

Power Pages Case Studies

Institute for Human Resource Professionals (IHRP), Singapore

The Problem

➤ Difficulties in managing the student portal are causing hindrances in the admission process for students.

➤ The portal lacks essential features that are necessary for expediting the admission process.

The Solution

➤ Thorough maintenance of the IHRP student portal to ensure its smooth functioning.

➤ Timely addressing of change requests specific to the IHRP student Portal to improve its functionality.

Win Partners LLC, USA

❓ The **Problem**

➤ Win Partners aims to ensure their customers purchase genuine products from authorized resellers.

➤ Win Partners wants their customers to verify products with an authentication sticker and avoid purchasing any counterfeit or duplicate items.

💡 The Solution

➤ Developed a cloud-based portal using Power Pages for Counterfeit Verification of Win Partners' products.

➤ The portal enables Win Partners' customers to check the authenticity of their purchased products.

➤ Implemented various reports to meet the specific reporting requirements.

Power Pages
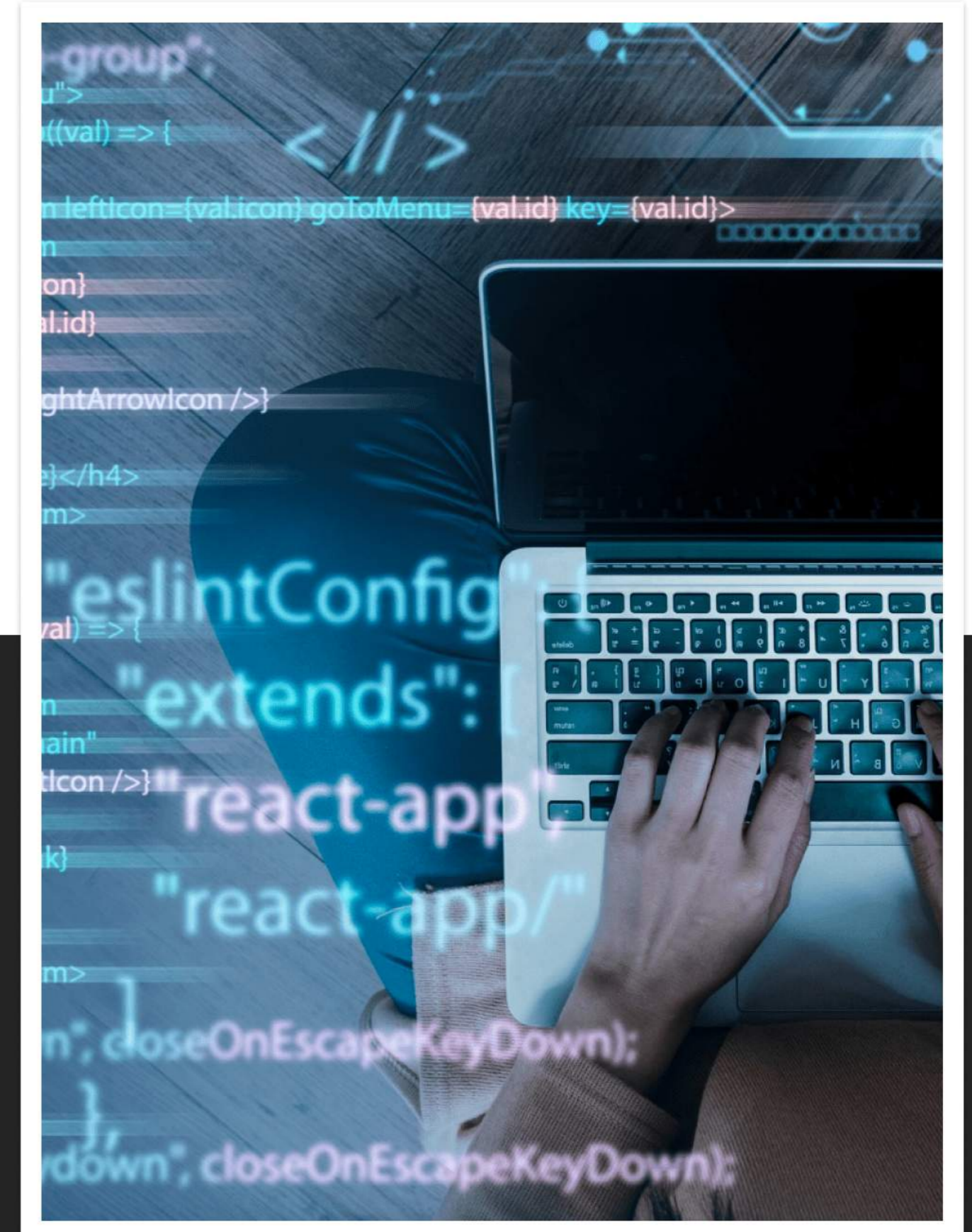
Global Transport Solutions, Netherlands

❓ The **Problem**

➤ Limited visibility and access to customer orders and data for Global Transport Solutions (GTS).

➤ Inefficient order creation process for customers.

➤ Difficulty in visualizing item data based on shipping vessels and warehouse locations.

💡 The Solution

➤ Developed a customer portal on Power Pages, integrated with the Business Central ERP system.

➤ Enabled customers to view all their orders and create new orders, selecting specific shipping vessels, warehouse locations, and items.

VCG Markets

Power Pages

VCG Markets, UAE

? The Problem

➤ Lack a portal to allow new customers to apply for a new account and create a demo account.

➤ Limited availability of comprehensive reports for data visualization and business oversight.

The Solution

➤ Developed a Power Pages-based customer-facing portal for new customers to apply for a new account and create a demo account at VCG Market.

➤ Implemented a user-friendly front-end interface to enhance customer interaction.

➤ Built various reports for comprehensive data visualization and improved business oversight.

Sea Port, USA

⊘ The Problem

➤ Customers lacked access to crucial information such as order details, invoice history, payment details, and shipment status.

➤ Sea Port faced inefficiencies and wasted time in manually sharing this information with customers on a regular basis.

💡 The Solution

➤ Developed a customer portal on Power Pages which is integrated to their Business Central ERP system.

➤ Customer data can view all their orders and can create new order

➤ Customer can view invoice history with payment details, inventory details and track shipment.
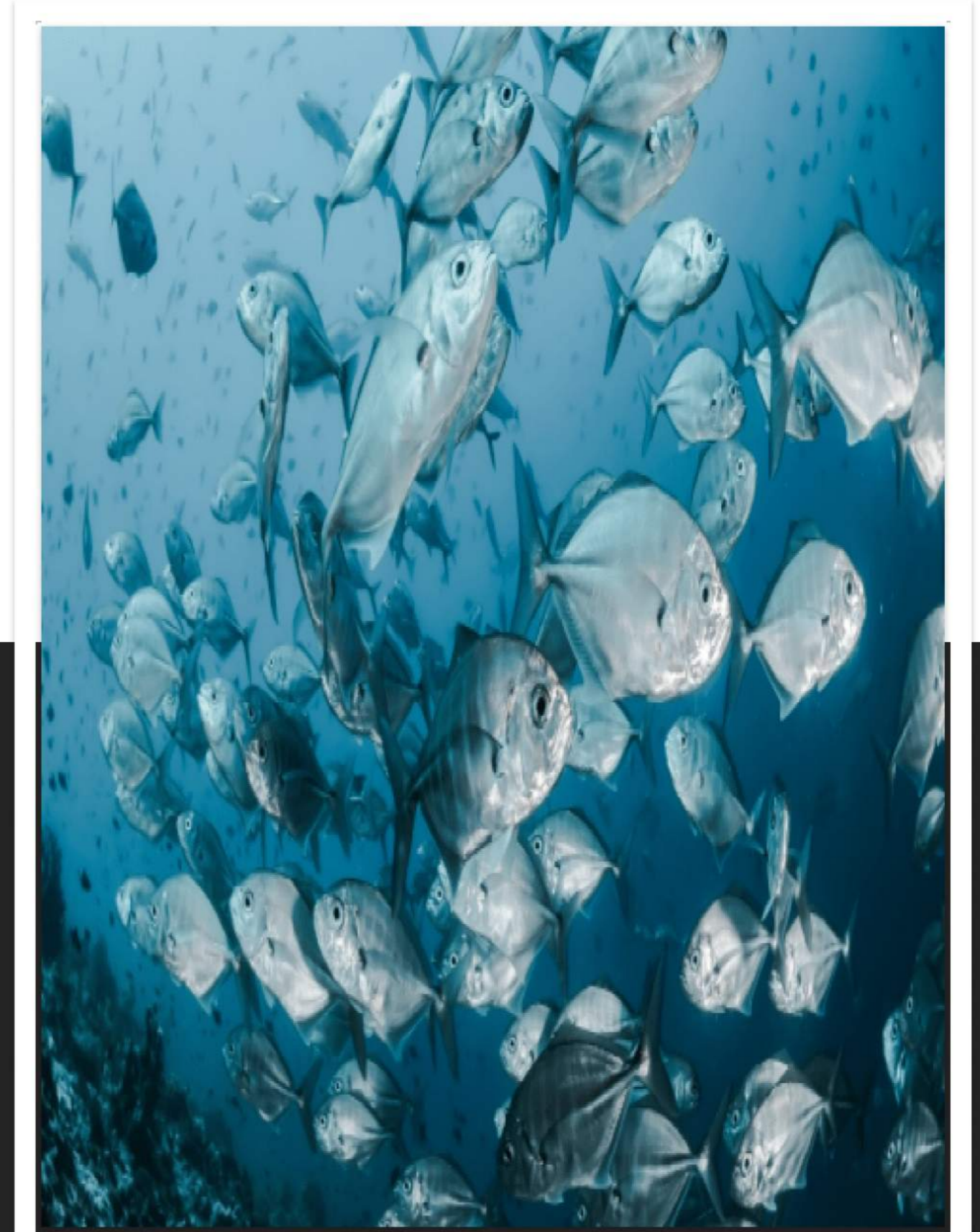
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