

## Technical Profile for Microsoft Dynamics CRM

We are a software firm working on PHP, .Net and Java platforms to develop Windows, Web and Mobile applications for any organization with effective and quality solutions. But as we know that Microsoft CRM is going to be the next generation technology in recent time with its ease of use, utilities and security so our company has built up a team to implement, configure, maintain and develop add-ons for Microsoft CRM. We have successfully achieved the requirements asked by our clients with the use of Microsoft Dynamics CRM.

According to our past work experience on Microsoft Dynamics CRM, we can divide the types of criteria which can be asked by the organization to be done with Microsoft Dynamics CRM mainly into 3 categories: 1) Implementation. 2) Maintenance and 3) Add-ons.

Our team has achieved the goals which they are asked by our clients for all above 3 categories. The Excellent team efforts with quality developers has made us master in dealing with Microsoft Dynamics CRM. We are listing our achievements on Microsoft Dynamics CRM by distributing them into 3 categories:

### Implementation

Our client was one of the leading organizations dealing in Import-Export business in 7 countries with steel and metal equipments. The client wants us to implement and configure the Microsoft Dynamics CRM application for his organization to connect all branches for managing purchase, sales, customers and reports. It's a big challenge for us to implement and configure a Microsoft Dynamic CRM portal for more than 700 users of an organization which fulfills all required criteria asked by them.

Our team of 2 developers, 1 team Leader and 1 Project manager has put endless efforts to achieve the goal for our client and setup a CRM which works efficiently and faster way for them in 140 days. Our team has completed the below things for the organization during this days to meet the deadline.

- Configuration of Microsoft dynamics CRM
- Implementation of new portal and setup a relationship with old organization database and converted into the CRM database to manage the same data.
- Creation of the necessary schemas of Database for managing old data
- Developed Add-ons.

## Maintenance

Our firm has also achieved the challenges for few maintenance projects of already implemented Microsoft dynamics CRM software for different companies. Here are the descriptions of projects done by us to meet client's requirement.

### ➤ Financial Management

**Description:** One of the key project steps was integration with the Client's proprietary front-end application and SQL Server database back-end which stored customer information obtained from offsite locations. The project avoided using an unsupported SSIS direct database update by creating synchronization for company and contact information using Scribe Insight and applying business logic and data translation in order to maintain the integrity of the Microsoft CRM customer database. A two-tiered training plan was devised and delivered to key company staff to facilitate the gradual deployment of CRM to 220 users over the period of one year.

### ➤ Sales Force Automation

**Description:** System puts you in complete control of your sales pipeline, allowing sales team members to effectively manage, forecast, and report on all phases of the sales cycle. With software, you can easily manage and analyze all current and historical account details and activities, manage multiple accounts and opportunities, and automatically distribute leads to sales professionals around the world. Sales cycles can be shortened and more deals can close faster. The sales force automation (SFA) capabilities within software provide your sales team instant access to vital customer data including reports and graphs, quotes, forecasts, and historical account details. The SFA capabilities enable you to quickly do on-the-spot analysis, make informed decisions you can trust, and eliminate bottlenecks that typically lengthen the sales cycle.

### ➤ Customer Support Automation

**Description:** This Automation is able to make the most of every customer interaction, maximizing business opportunities and customer satisfaction. It empowers your organization with critical information to build and support long-term customer satisfaction and loyalty. With fast online access to service requests, call and escalation history, interactions, multiple contacts, support cases, e-mail, and documents sent and received, you'll have complete and accurate data at your fingertips. Customer Support Automation enables you to quickly resolve issues and easily capitalize on cross-sell or up-sell opportunities.

## Add-Ons

As we know that Microsoft Dynamics CRM allows us to integrate Add-Ons with it. The developer can develop the Plug-in for integrating some functionality which is not included in CRM built in utilities. Our team has developed such kind of Plug in for different prospects asked by our clients. Here is the list of Plug in developed by us to provide some extra features with Microsoft Dynamics CRM.

### 1. Healthcare

- a. Configured Microsoft CRM 3.0 integrated with Exchange Server and Microsoft Outlook.
- b. Implemented standard MS CRM functions and MS CRM Customization to support user requirements from sales, quoting, and customer service and management departments to track and save all data daily and for data analysis.
- c. Customized MS CRM 3.0 by using MS CRM SDK tool with .NET 2.0, C#, Jscript to enhance the feature of User training with it.
- d. Integrated synchronize between MS CRM and legacy back-end web application by using Visual Studio 2005 platform .NET 2.0 with C#.
- e. Developed CRM views and reports for daily and analyzing process by using Microsoft Filter View and Microsoft SQL Reporting Service.
- f. Created MS CRM internal company user manual and provided training for management staffs.

## **2. Outlook Integration**

- a. Use all the features of Outlook entirely from within the interface; no more switching from one application to the other. Bi-directionally synchronize contacts, appointments, and tasks between Outlook and CRM software. Perform a one-way export from software to Microsoft Outlook. Send e-mail within software using Outlook and automatically have the e-mail stored in the relevant customer contact history, including attachments. Easily import e-mail from Outlook into the appropriate customer contact within software. Choose which contacts and calendar items flow between applications, allowing you to work the way you want.

## **3. Telephone Integration with Microsoft CRM**

- a. Telephone Integration for MS CRM 3.0 is a CRM Add On that enables you to connect the Telephone System (CTI) to Microsoft CRM. It works in both directions (incoming and outgoing) and is easy to handle.
- b. On Incoming calls it displays the caller name or number (depending if it can be found in CRM). On lifting the handset the contact/account opens. A incoming phone activity will be created, too.
- c. If you want to call someone Telephone Integration dials the number for you from inside CRM and creates an outgoing phone activity.
- d. Telephone Integration keeps track of your previous calls and enables you to quickly call back by selecting any previous phone call.
- e. Displays customized call information, based on CRM data with every call.
- f. A telephone-system with TAPI-interface is required to use Telephone Integration for Microsoft CRM.

