

MS Dynamics CRM with Organization Hierarchy

PositiveEdge helps implement Microsoft Dynamics CRM by giving Organization Hierarchical representation of Users associated with Lead/Account/Customer.



BUSINESS SITUATION

In Organization, Sales/Marketing/Telesales users create their business leads and associate these leads with other business users within the Organization or outside of an organization primarily with contacts or accounts. In case if the users wants to see the hierarchy or quickly wants to know whether the scheduled meetings are finished/meeting planned but not scheduled, users may have to navigate multiple screens.

SOLUTION

Considering the above situation, a solution gives you an Organization Hierarchy that represents all involved stakeholders in a hierarchical manner along with indicators in different colors those denotes different meanings like Meeting Finished / Meeting Scheduled / Meeting Planned Not Scheduled etc.

Below are few of the offerings:

Hierarchical view

This solution gives a complete view of the hierarchy of all the stakeholders those are involved in the meeting and clearly describes meeting details in a glance. Also based on the color, user can easily identify whether the meeting is finished / meeting is scheduled / meeting planned but not scheduled.

Appointments Creation

On the hierarchical view, by clicking on the user image, it will open a new appointment page where in user can fill the required details.

BENEFITS

- Gives a full hierarchical view of the users.
- Appointments can manage by clicking on the user image.
- Improve operational efficiency.
- Available on cloud and on-premise

Region: All

Industry: All

Engagement Highlights:

- ✓ Intuitive User Interface

Platform: Microsoft Dynamics CRM 2011

Tools and Technology used

- ✓ Microsoft Dynamics CRM
- ✓ Microsoft .NET Framework 4.0
- ✓ Microsoft Visual Studio 2010
- ✓ Silverlight

Results:

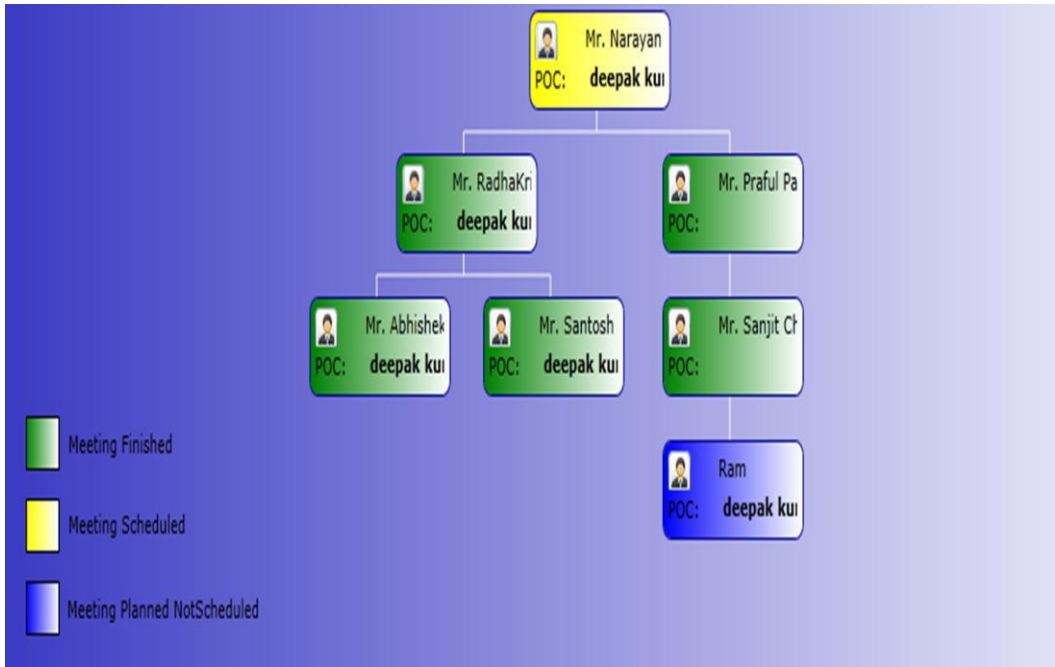
- ✓ Improved Business Process
- ✓ Increased efficiency and productivity

Clientele:

- ✓ Abaxis
- ✓ UTI Mutual Fund
- ✓ Tata Elxsi

Screen Captures

Hierarchical Representation:





Contact Us

US

39899 Balentine Drive, Suite 300, Newark CA 94560.
Phone: 510-315-0061, Fax: 510-315-0061

Bangalore

#597, Maple, 15th Cross Ring Road
J P Nagar 6th Phase, Bangalore-560078
Phone: +91-80-65791228, +91-80-65707240 (Sales)

For more information about how to discover diamonds in the crevasses between your core systems or to learn more about how PositiveEdge can help visit www.positiveedge.net or email pprahlad@positiveedgesolutions.com

