

MS Dynamics CRM with Portal Accelerator

PositiveEdge helps implement Microsoft Dynamics CRM enabling you to setup a web portal to manage sales and service.

BUSINESS SITUATION

Most of the organizations sell service renewals through the channel partners who are Distributor/Reseller, who have lower service renewal performance than companies with a direct renewal sales model. A major reason is poor visibility into sales pipeline, renewal rates and customer data. Moreover, channel partners do not have real time insight into opportunity data and thus leading to improper business forecasting, decisions making and loosing on time renewals.

SOLUTION

An organization requires the channel partners to have clear visibility of service renewal opportunity data of their customers. The CRM system that was used by the internal service representatives already had the data required and this had to be made available to channel partners. The Portal accelerator now consolidates the functionality of Portal Integration, eService and Event Management into one consolidated portal.

Below are few of the offerings:

Improve Customer Self-Service

Improve customer satisfaction and loyalty by giving customers the option to help themselves through the Web. The Microsoft Dynamics CRM Accelerator helps you provide a multi-channel service experience through a self-service Web portal that is easy to set up and maintain. Enable customers to find help fast, chat with a service representative, search for answers, and schedule services through the Web 24 hours a day, seven days a week.

Event Management

This accelerator gives companies the ability to easily manage the planning, execution, tracking and reporting requirements for events. It allows registration on the web for the events and track these registrations in Microsoft Dynamics CRM.

BENEFITS

- Improved Customer Self-Service.
- Channel Partners had clear visibility into renewal opportunities.
- Increased renewal rates.
- Increased customer loyalty.



Region: All

Industry: All

Engagement Highlights:

- ✓ Web portal for partner access on top of CRM
- ✓ Web Portal could be very easily setup for any customer of SSI

Platform:

- ✓ Microsoft Dynamics CRM 2011
- ✓ Microsoft Windows 2008 R2
- ✓ Web application on Windows Server 2003 / 2008 R2

Tools and Technology used

- ✓ Microsoft Dynamics CRM
- ✓ Microsoft .NET Framework 3.5 / 4.0
- ✓ Microsoft Visual Studio 2010
- ✓ SQL Server 2005 / 2008
- ✓ Ext Js 3.0

Results:

- ✓ A Channel Portal application built on CRM.
- ✓ An admin application to manage users.
- ✓ Satisfied Partners as they have more visibility into service renewal opportunities in their respective areas
- ✓ Satisfied Customers.

Clientele:

- ✓ ServiceSource



Screen Captures

- A web form hosted on the portal to capture Quote details.

Quote Request

General

Task Type: Quote Request Regarding: 3f4b882b-9d92-e111-9f... Subject: Quote Request - opp-te

Owner: Arunabh Hazarika Due Date: 10 May 2012 Assignment Date: []

Created By: Arunabh Hazarika Activity Status: [] Priority: []

Escalation: [] Description: []

Quote Attributes

Quote Request Type: [] Update Quote: [] Customer Type: []

Reinstatement Fees: [] Discount Comments: [] Margin Comments: []

Quote Revision Reasons

Revision Caused By: [] Revision Cause: [] Revision - Other: []

Billing and Terms Attributes

Transaction Currency: [] Start Date: [] Quote Type: []

End Date: []

Notes

[]

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- A form for booking request hosted on the customer portal.

Booking Request

General

Task Type: Booking Request Regarding: bca63e50-f05c-4592-8e... Subject: Booking Request- OPP-f

Owner: Arunabh Hazarika Due Date: 10 May 2012 Assignment Date: []

Created By: Arunabh Hazarika Activity Status: [] Priority: []

Escalation: [] Description: []

Booking Details

Contract Amount: [] Client Booking Date: []

Notes

[]

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- A data processing request from on the portal.

Data Processing Request

General

Task Type: Data Processing Regarding: bca63e50-f05c-4592-8e... Subject: Data Processing Request

Owner: Arunabh Hazarika Due Date: 10 May 2012 Assignment Date: []

Created By: Arunabh Hazarika Activity Status: [] Priority: []

Escalation: [] Description: []

Processing Attributes

Process Type: [] Processor: [] Process Date: []

Parent Opportunity: [] Processing Comments: []

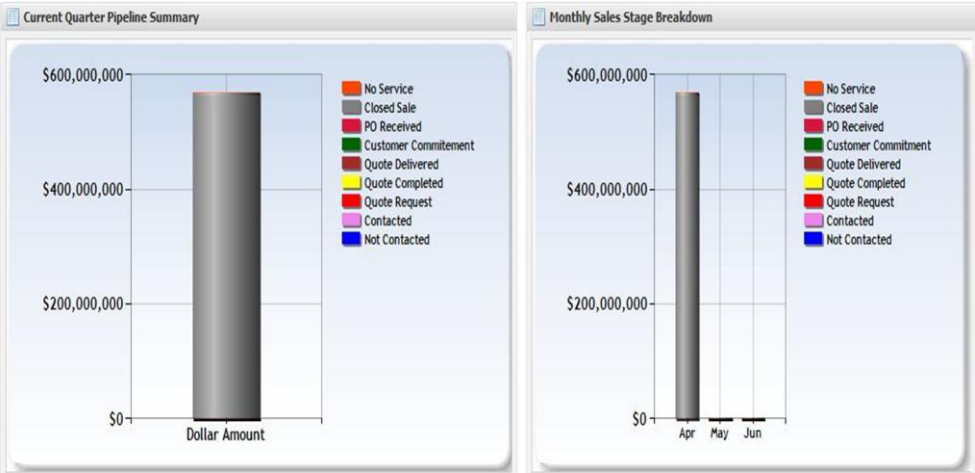
Notes

[]

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Screen Captures

- Charts published on the Portal.





Contact Us

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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

