



Industries / Information Technology

Helped a Renowned Information Technology Client Meet CRM Needs

OUR CORE VALUES: PASTA - P = Passion, A = Appreciation, S = Simplicity, T = Trust, A = Accountability



Project Description

The client is engaged in the areas of Domain, Server Hosting, Web Hosting Linux and & Windows, Email Hosting, Remote Desktop and IT Support. This project is related to Customization and Configuration in Sales, Admin and Service Module in MS Dynamic CRM 2015 (On-Premise). The customization involved Entity Creation, Billing Module, Recursive work flow, Order to Invoice Operation, IP Address Calculation Module, Ribbon Customization, Account , Quote ,Order and Contract Module customization, Time tracking of the service model, Customization in Sale Module Entity, and SLA Generation of SSRS and PDF Report.

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Project Features

Here are some of the features of this application:-

- Workflow Creation which executes recursively.
- Workflow creation which sums all orders and groups them by their customer and then creates invoice.
- Customized the Account Entity.
- Workflow creation to calculate time from Entity and then Create Order.
- Customized Contract Entity for Displaying product info when selecting order from contract line.
- Created record using O-data query.
- Creation of workflow from quotes to Order/Contract.
- Plugin to create new Contract automatically when Contract Expires.
- Workflow to download file from link and insert into Dynamic CRM.
- Customized the product and Quotes entity.
- Customized case entity and added SLA.
- Generated SSRS & Custom Report and Deployment in MS Dynamic CRM.
- Created Work flow to send Email with report in attachment in xls or PDF format.
- Workflow to create all possible IP addresses from given network and Subnet mask and link them to proper entity.
- Ribbon Customization.
- Created custom plugin for business requirement.
- Created solution for business requirement.
- Created and customization of Invoice for single and Multiple based on discount.
- Created Business Rules.
- Entity Creation and related task.
- Call Workflow using Javascript.

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Problem Statement

- Client wanted to perform some tasks on recursive basis.
- When an incident is opened up, time tracking should start and when the browser window is closed, time tracking should stop.
- Calculating all possible IP addresses within the Subnet and Subnet mask.

Challenges during Implementation

Few challenges we faced while developing the system

- Calculation of all the IP addresses within the given subnet and subnet mask.
- Creating order from Contract and regenerating Contract when it is Expired.
- Creating invoice from order and then grouping the customer and generating one invoice.

CIS Solution

We created a solution that calculated all IP addresses within the given subnet and subnet mask. New contract is created automatically when the old one gets expired.

Positive Outcome

The CRM solution thus provided makes it easy to perform the tasks on a recursive basis. It simplifies various internal processes related to orders, invoices and contracts.

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Technologies Used



Our Achievements



14+
YEARS
IN BUSINESS



05
WORLDWIDE
OFFICES



1000+
EXPERT
TEAMS



12+ Yr
WEB
EXPERIENCE



7+ Yr
MOBILE
EXPERIENCE



7+ Yr
MARKETING
EXPERIENCE



100+
WORLDWIDE
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Gain useful insights into your business with our Business Intelligence & Analytics solutions that have a strong backing of our wide-ranging domain expertise and technology skills.

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