

Q3 integrated Microsoft CRM 4.0 with Microsoft SharePoint server 2007 and provided more powerful search engine allowing CRM users to link documents to any CRM entity.

Q3's global sourcing model gives the maximum benefit to customers in terms of cost savings, improved quality, access to highly talented professionals, flexibility of operations and reduced time to market.

Case Study - Google Cloud VIP Reservation Application

Company Profile

Client provides cutting-edge solutions that deliver sales and marketing results for online marketing activities by combining data mining, user profiling and database marketing.

Client required an application that would integrate Microsoft CRM 4.0 with Microsoft SharePoint server 2007 and provide analysis reporting features. Client was looking for a complete customer management system, with reports, custom views and data exchange between Microsoft CRM 4.0 and Microsoft SharePoint server 2007.

Business Situation

Technical Solution

- » The Microsoft CRM technology experts at Q3 thoroughly studied the client requirements and investigated the various features provided by their existing application. Based on the study a FRS (Functional Requirements Specification) document was developed.
- » The design team designed the application tool and the integration very carefully based on the functional requirements.
- » Q3 assigned a team of Database experts to design the database and reports.
- » Q3 involved the QA team from the very beginning to ensure a very good quality and bug free design was maintained.
- » Q3 realized that the quality and setup of the application was very important so a review process was implemented to avoid the errors and ensure optimization of the tool.
- » Q3 setup the Microsoft CRM 4.0 integrated with Domain controller and setup the CRM-Email router. The campaign emailing was setup for the client to send mails to the prospective leads in the database. Based on the responses, the results were categorized into two categories: Positive and negative leads. The client could convert the leads to various opportunities and finally convert it into an account. The finance team could raise invoices on the orders for the account. All the activities and the conversations are captured in the system.
- » User based security roles were setup for the entire organization based on the organization chart and the business.
- » System based views and personalized views were created for user members.
- » Q3 integrated the Microsoft CRM 4.0 on the client's Microsoft Outlook 2007.
- » Q3 developed and integrated a custom tool for report generation; this analysis tool was developed using .Net. A customized view on this tool was also developed to fulfill the customer requirements.

- » Q3 integrated Microsoft CRM 4.0 with Microsoft SharePoint server 2007. Major benefits to the client were:
 1. Provided more powerful search engine.
 2. Created SharePoint document repositories for every entity from within CRM
 3. Allowed CRM users to link documents to any CRM entity
- » For the maintenance and enhancement of the project, a dedicated team of SharePoint experts has been provided to the client with the option of working in flexible hours, if needed.

- » Microsoft CRM 4.0
- » .NET Framework 3.0
- » SQL Server 2005.
- » Microsoft SharePoint Server 2007
- » C#
- » Crystal Report

Technologies

Benefits

- » Improved Productivity
- » Better customer service
- » Gain insights on business performance
- » Increased efficiency
- » Increased reliability