

# Implementing Microsoft Dynamics 365 as a Sales Force Automation Solution

## Objective

Our customer was using a legacy GlobalBake ERP system to manage all aspects of their operations, right from inventory, manufacturing, product development to sales forecasting and management, customer service and accounting. They needed an online CRM solution that could work in conjunction with their existing ERP system, bringing together the best parts of both systems to streamline and automate the current sales operation.

## Challenges

- Data Migration of historical data
- Integration for ERP System - GlobalBake software
- Managing disparate customers types with different customer profiles was inefficient, keeping their processes, inventory, and their people connected with complex sales process

## Approach

Rishabh Software adopted a phased implementation approach to deliver the solution into 2 incremental releases. Each phase was built upon learnings from the previous phase to deliver specific items that were essential to the success of the project as a whole. The 2 phases were planned with following deliverables:

- Microsoft Dynamics 365 Sales App setup covering customer-specific sales cycle process flow, web leads tracking & management, customer / debtors management, opportunity tracking, quotes & sales order generation and invoicing.
- Microsoft Dynamics 365 and GlobalBake ERP integration using Skyvia cloud connector to integrate Customers, products, Sales & Invoices data between two systems

A team of four Dynamics CRM developers worked on the following:

- Planning, Business Requirements Analysis
- Fit-Gap Analysis & Technical Design
- Implementation (Configuration and Integration)
- Validation & Conduct User Review Sessions
- Transition Support (UAT Support)
- Production deployment

## Business Benefits

- 30% increase in sales as Sales Cycle is defined in CRM which simplified the process from Tracking Leads to the qualification of the deal, managing the pipeline, Quote, and then Order
- Customer Types and Customer profile data are maintained effortlessly
- Seamless data synchronization between Dynamics CRM and GlobalBake

## Industry Segment

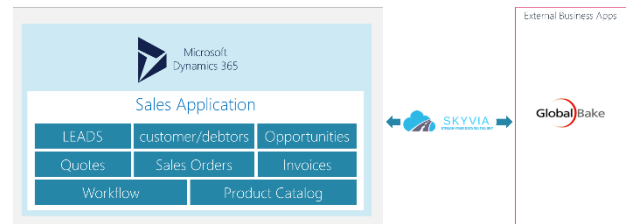
Manufacturing

## Customer Profile

Australia based wholesale bakery manufacturer with over 50+ bakery products.

## Technology and Tools

- Microsoft Dynamics 365
- SkyVia Cloud connector
- Microsoft .NET
- Microsoft C#
- Microsoft Visual Studio 2017
- REST API for Web Lead integration



- Prospect Business Name
- Existing / New Customer
- Existing Customer No.
- Primary Contact Name
- Lead Description (need)
- Annual Revenue Gain
- Win/Lose Notification Date

- Channel
- Fresh or Frozen
- P1 or P2 Production
- Primary Product Category
- Region
- State
- Postcode

- Presentation/Proposal Date
- Purchase Process
- Key Account (if applicable)
- Margin Estimate
- NPD Approved (if applicable)

- Commercials Approved
- Proposal Format
- Proposal/Pitch Completed
- Initial Feedback/Response
- Next Steps

- Decision Date

- Win Or Lose
- Win Value (annual revenue)
- Commencement Date
- Contract or Agreement Required?

## About Rishabh Software

Rishabh Software is a CMMI 3, ISO9001, ISO 27001, Microsoft Gold Partner & Oracle Gold Partner providing application development services & solutions to mid-sized enterprises globally through our offices in the US, UK and India. We leverage the latest technology stacks in Cloud, Mobile, Business Intelligence and other Enterprise technologies helping clients to get the best value of their IT budget. With our team of 250+ application developers, we have implemented 1000+ successful projects across 24 countries. We work on .NET, Java, PHP, iOS, Android, Oracle, IBM and Open Source technologies.



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