



# Dynamics 365 Customer Engagement Implementation Helps A Chemicals Supplier Streamline the Workorder Approval Process

## CASE STUDY

**Customer:** A leading supplier of single source speciality chemicals

**Size:** 501-1,000 employees

**Location:** Sharonville, OH

**Industry:** Chemicals

**Profile:** The client delivers specialty cleaning and process solutions for general manufacturing, pulp and paper making, transportation cleaning, and water treatment markets.

**Services:** Dynamics 365 Customer Engagement

## Business Need

The client supplies chemical solutions to customers across several markets and has a huge sales team with over 700 resources. The client used a basic SharePoint system to carry out day-to-day sales operations, with no dedicated CRM system provide exact quotations to customers. However, since the approval process was extremely complex, comprising sales reps, managers, regional presidents, COOs, finance and more, several levels of approvals were needed.

The client had a quotation management need and was looking to embrace features across pricing and discounting, so it could provide customized discounts to specific customers based on contract. Since the SharePoint system only offered a limited set of sales capabilities – and no advanced sales features – the chemicals supplier wanted a process-oriented system in place – with proper approval flow – to streamline the quotation approval process and boost overall sales efficiency.

The client partnered with Synoptek to help enhance the quotation approval process as well as improve the efficiency with which the sales teams manages workorders and cases.

## Solution and Approach

*Given Synoptek's experience and expertise in CRM, we recommended implementing Dynamics 365 Customer Engagement to streamline the complex quotation approval process and make it easy and convenient for the supplier's sales team to manage customers and optimize sales.*

As part of the engagement, we carried out several activities for the client:

- Migrated data from SharePoint for data capture
- Enabled the pricing exception (quote) entity, so the client could leverage the quoting and discounting feature to customize discounts for different customers
- Created cases (from D365 Customer Service) and work orders (from D365 Field Service) to optimize the servicing process
- Enabled functionality to create cases for different warehouses and assign to responsible users
- Streamlined the process of creating workorders for labs to test different chemical mixes and analyze results
- Enabled integration with SQL database as well as AX 2009 and created a process in the CRM to integrate customer address and contact data to be sent to the Dynamics AX ERP system
- Moved all accounts, cases, and work order related files from on-premises SharePoint to SharePoint Online, so the client can use SharePoint as a document repository unlike earlier for tracking, cases, opportunities, work orders
- Built PowerApps for all users to report any incident that happens in their location; the app allowed users to create a case in CRM and fill in basic details such as where the incident happened, which customers or locations were affected, and which reps or employees were responsible



## Business Results

*Under Synoptek's guidance and support, the chemicals supplier was able to achieve several business benefits through Dynamics 365 Customer Engagement implementation including:*

- A streamlined approval process that makes it easier and quicker for sales teams to file and seek approvals
- Automatic notifications, so those responsible can approve or reject workorders in an accelerated manner
- Advanced pricing and discounting that enables sales teams to define specific rules to meet customers' unique needs
- Enhance the quality and speed with which customer requirements are addressed – improving customer satisfaction

## About Synoptek

Synoptek is a global systems integrator and managed IT services provider offering comprehensive IT management and consultancy services to organizations worldwide. Founded in 2001; headquartered in Irvine, CA, we have offices and resources across North America and delivery centers in Asia.



19520 Jamboree Road #110 Irvine, CA 92612



888.796.6783



[www.synoptek.com](http://www.synoptek.com)