



Dynamics 365 Customer Engagement Implementation Helps A Waste Management Company Digitally Transform Business Processes

CASE STUDY

Customer: A successful biosolids and organic waste management company

Size: 800+ employees

Location: MD, USA

Industry: Waste Management

Profile: The company offers transportation, treatment, site monitoring, land application, and environmental regulatory compliance services, as well as dredging, dewatering, and cleaning services for municipal and industrial lagoons

Services: Dynamics 365 Customer Engagement Implementation

The Biosolids organization was on the lookout for an Technology partner who could deliver an integrated solution that would help gather, store and evaluate the data flowing from current Oracle NetSuite system into Dynamics 365 Customer Engagement. The client approached Synoptek for implementing the solution, eliminating manual data entry of tickets, and report generation.

Business Need

The biosolids organization was looking to reduce the amount of paper transactions, the associated data entry, and the costs of handling documents. It wanted to place collection and delivery transaction forms in the hands of truck drivers with a digital phone app that replaces paper documents. The client wanted drivers to seamlessly and remotely operate the app online, so they could capture day-to-day transactions and submit images of source documents.

The client wanted to implement the Dynamics 365 Customer Engagement platform as a digital transformation application for its growing business, to enable both business development activities and revenue-generating field transactions. Key requirements included:

- Implement Dynamics 365 cloud platform
- Minimize licensed, out-of-the-box functionality to specified scope
- Build a role-based app using PowerApps with UX attention on driver usability
- Integrate Dynamics 365 with NetSuite
- Provide administrators with easy to use views and dashboards.

Solution and Approach

Synoptek began the engagement by understanding the client's existing systems and processes. The client had huge amounts of data on Customers, Projects, Collection Locations, Locations, Billing Item Codes, Expense Codes, Truck Ticket (WO) and more in Oracle NetSuite. To automate this process, Synoptek divided the solution into four parts:

1. NetSuite to CRM: Initial data was pulled over to Customer Engagement using KWS SSIS
 2. CRM to PowerApps: Data was pulled in PowerApps with the help of CDS
 3. PowerApps to CRM: Data was again pulled from PowerApps through responsive UI and CDS
 4. CRM to NetSuite: After Work Order creation, data was pushed NetSuite using KWS SSIS
- **Assets – OOB:**
Stored truck information in Facility/Equipment entity
 - **E Ticket – Custom:**
Stored Provided facility to field admins to print ticket information – single as well multiple - from the e-ticket itself
 - **Work Order – OOB:**
Posted Image/Exact replica of the e-ticket which gets integrated to NetSuite

Dynamics 365 Customer Engagement Field Service Implementation

For the Dynamics 365 Customer Engagement Field Service Implementation, Synoptek carried out the following activities:

- **Customers – OOB Accounts:**
Utilized accounts in Dynamics 365 Customer Engagement to store customer information from NetSuite.
- **Address - Custom:**
Stored address information of collection locations with 1 CL- N Address relationship
- **Product Types - Custom:**
Created bridge entity Account Product Types to associate collection locations and product types
- **Project – Custom:**
Pulled projects from NetSuite which contained detailed information about tasks that need to be done by drivers
- **Driver Project Assignment – Custom:**
Created N-N Entity to allow operation managers to assign drivers to projects

PowerApp – E Ticketing App

Synoptek created an e-ticketing app for drivers , so they could automate the process of manually entering details . To fetch/push data to and from Dynamics 365 Customer Engagement, Synoptek used the premium connector of CDS.

- **Project Screen:**
Designed a screen where drivers can select State (assigned to them) and based on state selected projects get populated.
- **Pickup Process:**
Designed tabs where drivers can add data related to Asset, Collection Location, Product.

Integration/Migration

To bring data from NetSuite and push it back after the Work Order gets created in Customer Engagement, Synoptek adopted the KWS SSIS tool. Pre-defined saved searches of NetSuite were used to pull data using NetSuite Connector to make smooth integration.

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- **Data Pull Packages:**

Customers, Projects, Collection locations, Addresses, Product types, Destination locations, Destination types, Billing item codes, and expense code information was pulled from NetSuite to Customer Engagement.

- **Data Push Package:**

Pushed Work Order information from Customer Engagement to NetSuite.

Server Deployment

Synoptek made use of Azure blob storage to deploy all integration packages built using KWS.

Business Results

With Synoptek's services, the waste management company achieved a number of business benefits:

- Automated key processes and reduced the number of manual transactions.
- Reduced costs associated with data collection and document management by building a driver-centric app
- Delivered easy-to-use reports and dashboards that provided timely and accurate insight.

About Synoptek

Synoptek is a global systems integrator and managed IT services provider, offering comprehensive IT management and consultancy services to organizations worldwide. The company works in partnership with clients of all sizes – from mid-market to Fortune 100, and for over two decades, its focus has been to provide maximum business value to its clients, by enabling them to grow their businesses, manage risk and compliance, and increase their competitive position. Synoptek is committed to delivering improved business results and unmatched service to every client, every time.

19520 Jamboree Road #110 Irvine, CA 92612

888.796.6783

www.synoptek.com

salesinquiries@synoptek.com

