



MS CRM Practice for Microsoft Partners (Implementation Services)



COMPANY PROFILE AND OVERVIEW

IOTAP MS CRM practice services numerous MS Gold Certified and Business Solution Partners. These partners currently operate out of the following countries: US, UK, Norway, Finland, Australia, New Zealand and South Africa.

BUSINESS SITUATION AND CHALLENGES

MS CRM's sweet spot continues to be SMBs, these companies have their own challenges: financial constraints, maturing business practices and have shortened windows for the ROI on IT spending.

In addition every implementation has its set of challenges for integration – most SMBs are not keen in overhauling their ERP, Accounting and CRM systems at the same time.

Customers have unique business processes that allow them to stay nimble and differentiate themselves, which makes it difficult for an implementation partner to determine the size of implementation and plan resources.

MS CRM partners therefore are often faced with the feast-or-famine phenomenon for their technical services needs.

In addition, they are faced with shortage of resources as these resources need to be technical, understand business processes, well versed with the CRM domain and have the necessary technical exposure to MS CRM

IOTAP's ROLE

IOTAP is a MS Gold Certified Partner and MS Business Solution Partner. IOTAP works as a sub contractor for MS Partners and has been involved in over 40 CRM implementations. Our Consultants are experienced technical engineers who are certified on both MS CRM and .NET frameworks. Our flexible engagement model allows our customers to scale up and down the resource pool and we do this wearing their shirts. Our partners own the customer, IP and solution.

"The staff and service are IOTAP second to none. All of our projects are completed on-time, under-budget and exceed the requirements of the business user"

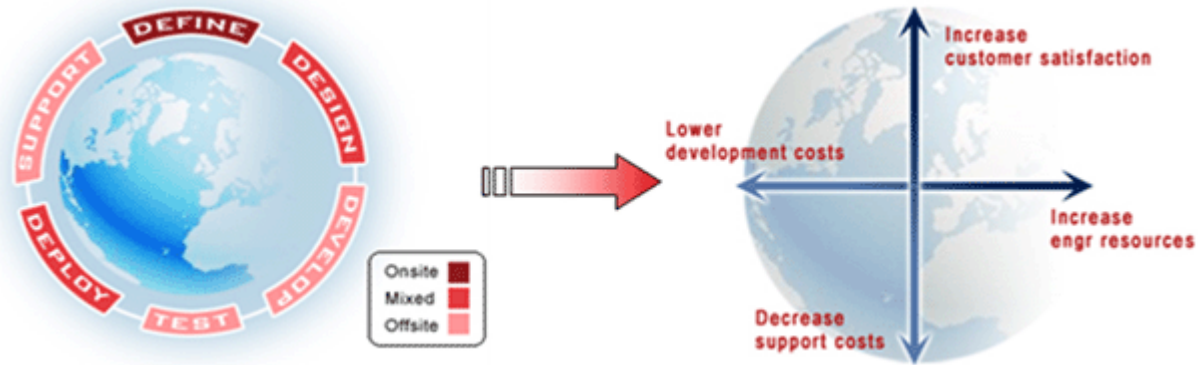
*Michael Melanson,
Vice President
AMR Research
USA*

"Thank you very much for all your help. IOTAP makes the process of subcontracting to an overseas resource quite painless. The team is responsive and agile. You are an ideal partner for an organization of our size. I look forward to working with you in the future"

*MS CRM Partner,
USA*

SOLUTION AND BENEFITS

- IOTAP provides the following services: Configuration, Customization, Integration, Data Migration, Sales Force Automation and Marketing Consulting.
- IOTAP has a suite of add-ons that is available to our partners. These add-ons are enhancements those bridge the functionality/feature gap and allow our partners to sell MS CRM and differentiate themselves from other partners. To view some of these add-ons follow this link:
<http://web.iotap.com/GlobalSoftwareSolutions/MicrosoftCRMAddOns/tabid/258/Default.aspx>
- Our multi-shore delivery shortens the implementation cycle.



- By subcontracting technical delivery, Partners are able to stay focused on their core competencies and increase revenues through license sales and add-ons.
- Our rich experience across varied industries allows our partners to define best practices for their clients and differentiate themselves by providing verticalized solutions.

IOTAP's CRM SERVICES & EXPERTISE

DEVELOPMENT TOOLS

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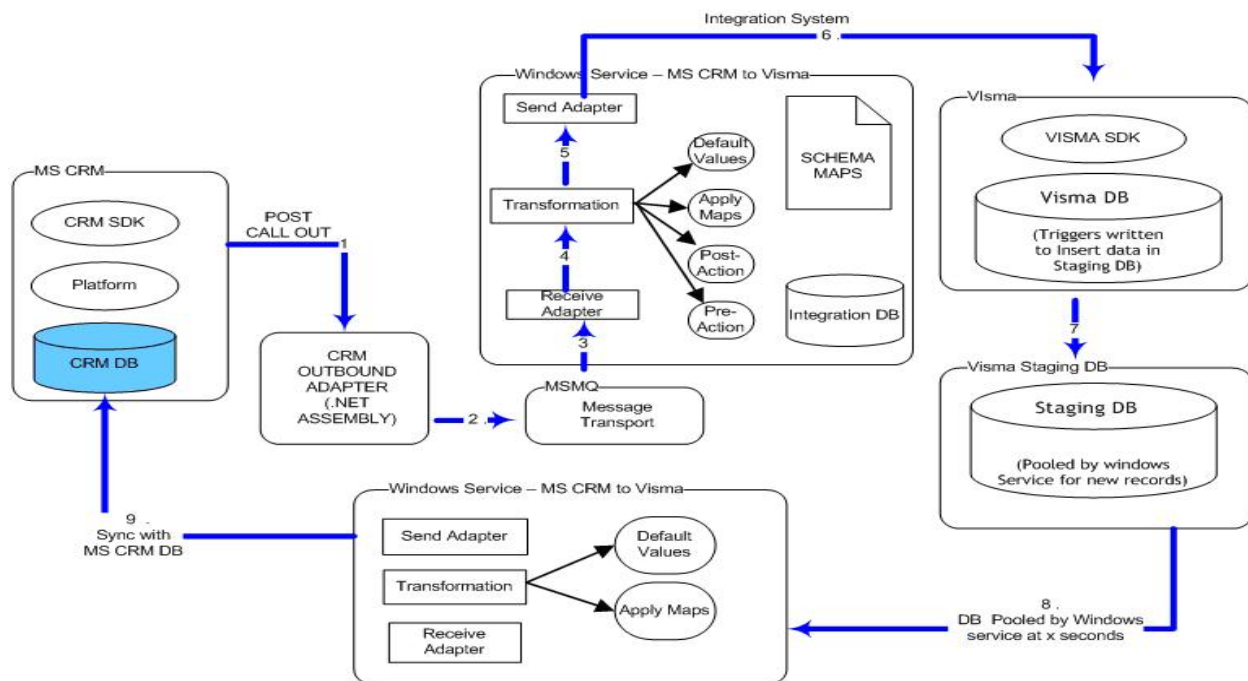
- Requirements Gathering & Functional specifications
- Effort Estimation
- Gap Analysis
- MS CRM solutions & Custom Applications
- Configurations
- Customizations: Entity, Form, View, AJAX, Lookup
- Callout and Workflow Plug-in
- Migrations to MS CRM from other CRM systems (Onyx, Salesforce.com)
- Upgrading MS CRM
- Customized Reporting using MS RS.
- Customized KPI development using Fusion Charts



- Integrating with other systems
- Testing

PROJECTS/ADD-ONS SHOW CASE

- **MS CRM – Visma Integration:** A two-way, real-time integration between MS CRM and Visma. The integration involved multiple entities such as *Accounts, Contacts and Products*. The solution consisted of an integration engine that used a window services, MSMQ, Web services and XMLized data.



- **MS CRM – Active Directory Integration:** This two-way, real-time integration allowed an ISP to sync data between its MS CRM system and Active Directory. The solution leveraged our integration engine that has been defined above.
- **Organization Chart:** An add-on that provides a comprehensive drill-down view of the different relationships between accounts and contacts, displaying vital information about these entities without navigating the details section.
- **KPI's and Dashboard:** IOTAP has built several dashboards, reports and defined KPIs for various verticals. Our reporting solution uses MS Reporting Services and Dundas Controls. The charts are real-time, provide a comprehensive snapshot that allow decision makers to glean vital information. The users are able to drill down to transaction level of information and can be delivered in various formats.
- **Encryption Module:** IOTAP has built an engine that allows customers to store sensitive information in an encrypted format. This solution is critical for those clients who want to store information such as passwords, social security IDs etc.
- **Generalized Components:** IOTAP has built controls/callouts which are generalized and easily

configurable to meet different client requirements. For e.g. we have developed a Multi-select control and an Auto numbering Callout.

- **Perform Bulk Action on Entities**

- This is custom built add-on allows a user to create “Sales Opportunities” or “Service Cases” for the Accounts entity **in bulk**. It is accessed via Grid Toolbar and hence accessible through any view. It is currently configured for the “Accounts” and “Contact” entities. This add-on saves user’s considerable time while performing repetitive actions as well as reduces error. The bulk action is applicable to the results of a search. The user can perform a bulk action on selected records, on all records returned or the records displayed on a current page. To view a pictorial representation of how a user could perform Bulk Operations, please visit: <http://web.iotap.com/Portals/2/Bulk%20Actions.html>

- **Identity Verification using Third Party Web Service**

For one of our UK clients, IOTAP developed an Identity Verification service. The component would authenticate User Data lying in MS CRM by calling a Third Party Web Services which would return a Verification Score for a Contact and perform predefined workflow steps based on the Score.

- **Extending/Exposing MS CRM Data through Portals**

IOTAP developed a Customer Portal that allowed end users to view and update their cases. This was provided using MS CRM web services to retrieve and update the cases. The customer would access a main portal (already existing) and from there would navigate to the portal that IOTAP developed which would fetch MS CRM data. Let them add/edit case info and that would be further handled by Cust Service Representatives. The basic feature added was to View Existing Cases, Create New Cases, Edit old Cases and Delete Cases.

- **Multi Select Control**

The purpose of this application is to provide control to allow a user to select one or many master attributes applicable to the parent entity record. An example of this would be when a user adds the ‘donor’, ‘youth pastor’ and ‘volunteer’ role attributes to a person / contact (parent entity record).The master attributes for a parent entity are maintained in a related master table, e.g. Contact Role Master table for the Contact parent entity.

Selected attributes for a parent record are added to or deleted from a related parent entity table, e.g. Contact Role table. The control itself has two panels and a set of left and right directional arrows. The left panel contains all unselected master attributes for the parent entity record. The right panel contains all previously selected attributes for the parent record. Attributes only exist within the left (master) or right (selected) panels only.

Double clicking on an attribute or highlighting an attribute and then clicking on a directional arrow will visually move the attribute from one panel to the other. Moving the attribute from the left to the right panel adds the attribute to the parent record. Moving the attribute from right panel to the left panel deletes the attribute from the parent record.

- **Recent List**

This add-on tracks entities such as Accounts and Contacts that were recently viewed by a MS CRM user. It allows the user to conveniently navigate to the entity directly from the Application Menu Bar. The number of entities stored in the list is configurable. The different entities which would need to be tracked in the recent list (such as opportunities, leads) would be minor customizations. The add-on



currently allows you to track up to 5 accounts and contacts that were recently viewed. To view a pictorial representation of how a user could benefit from the “Recent List” add-on, pls visit:

<http://web.iotap.com/Portals/2/Recent%20List.html>