

Streamlining Sales Prospects Through Microsoft Dynamics 365

Qellus enables you to seamlessly add new customers - from sales prospect to approved business partner



This case study will demonstrate how Qellus...

- Provides a solution for companies to seamlessly create new SAP business partners from D365 prospects.
- Helps companies share data and documents through the customer lifecycle.
- Creates an improved view of the customer relationship, capturing documents, data, and details from beginning to end.
- Removes the need to manually enter new customer data in SAP.
- Enables functional teams to have access to a single, trusted view of the customer relationship.

Microsoft Dynamics 365 (D365) has become commonplace for companies to begin their relationship journeys with their customers. However, D365 is one of many applications that companies rely on to manage their relationship with customers.

Customers start as prospects in D365 and often need to be manually recreated and transferred into SAP, introducing a labor-intensive and error-prone process for businesses. Qellus offers companies an efficient process that streamlines the hand-off of sales prospects in D365 to other systems like SAP quickly and easily.

This use case will explore Qellus' solution and why it's so valuable for enterprises.

The situation

D365 is a commonly used Customer Relationship Management (CRM) system for businesses across various industries. It is often involved in the first step of their customer journey, capturing key information about new business prospects as they arrive. However, many businesses use additional systems like SAP to review and approve new business partners before they can conduct business with the company.

Qellus offers the missing link to the process, helping teams streamline their review and approval process between D365 and SAP without the need for manually re-entering data or requesting additional customer information.

Currently, a default integration between the two systems does not exist to seamlessly hand off the creation of new business prospects in D365 and have it follow the enterprise process for review and approval of business partners in SAP. This results in a labor-intensive and error-prone process requiring all documents related to customer prospects managed in D365 to be manually recreated and transferred into SAP.

Frequently, the two systems retain their own data, and the different views of customers between sales, finance, and operations lead to terribly inefficient processes. This requires additional customer requests, manual data entry, and the constant potential for errors.

The challenge

Frustrated account managers and customer onboarding teams have to put up with inefficient manual data-entry activities, constantly dealing with data errors from manually copying customer data between different systems. The challenge behind this situation is the lack of integrated systems where data and documents logically link together to streamline the customer relationship. CRM systems like D365 manage the new prospect, while master data solutions like SAP MDG (Master Data Governance) manage the onboarding of new business partners, and Enterprise Resource Planning (ERP) systems, like SAP S/4HANA, manage the ongoing sales transactions with the customer.

Unfortunately, these systems do not transfer data and documents between the business partner phases as seamlessly as businesses would like to operate. Organizations are forced to request the original information from customers and manually reenter the data throughout the customer journey, increasing the chance for errors and degrading customer relationships.

An integrated system would provide a full view of customer history from beginning to end, aiding sales, customer service, and financial teams across the organization. However, without such a system, businesses remain stuck without a way to accelerate customer onboarding or validate the integrity of customer data.

Organizations must gain the ability to leverage their CRM, ERP, and master data platform investments and maintain customer history from beginning to end to realize greater operational efficiency.

Qellus offers the missing link to the process, helping teams streamline their review and approval process between D365 and SAP without the need for manually re-entering data or requesting additional customer information.

The solution

Qellus provides a solution for companies to seamlessly hand off the creation of new business prospects in D365 and have it leverage their standard enterprise processes for review and approval of business partners in SAP.

Through intelligent use of the OpenText Extended ECM platform, companies can share data and documents through the customer lifecycle, from D365 to SAP MDG and SAP S/4HANA. This ultimately creates an improved view of the customer relationship, capturing documents, data, and details from beginning to end.

Organizations will no longer need to re-enter customer data for each system manually and instead accelerate customer onboarding and approval through an automated, integrated approach between D365 and SAP.

Here's how it's done:

Qellus enables Extended ECM for D365 as an enabler to capture customer data and documents early in the prospecting phase

This data object is shared and integrated with leading applications like SAP MDG and SAP S/4HANA through OpenText Extended ECM.

Functional teams have access to a single, trusted view of the customer journey and can accelerate the onboarding process through a superior user experience that avoids data entry errors.

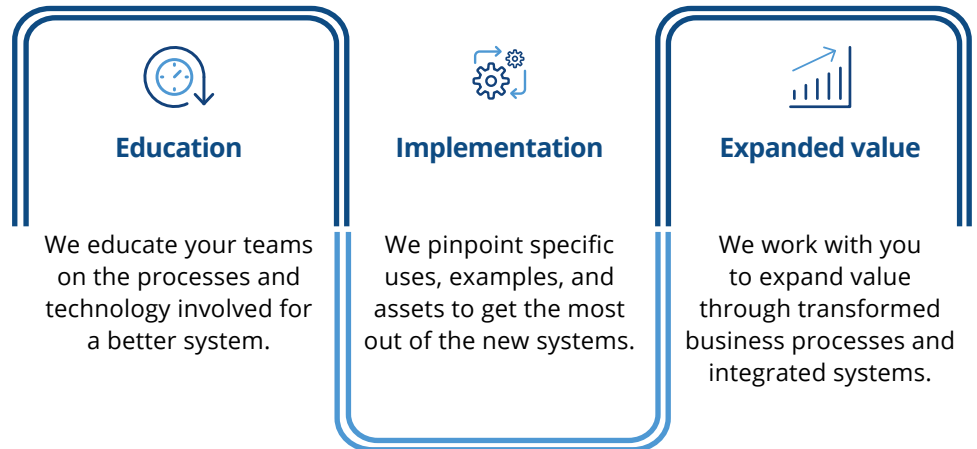


A better process

If you're ready for the seamless transfer of data and documents from prospects through customer confirmation, it's time to contact Qellus. We offer a solution that provides a complete view of customer data from beginning to end, aiding sales, customer service, and financial teams across your organization.

It's time to move from the labor-intensive and error-prone processes of the past towards a streamlined, seamless system for processing new customers - from sales prospect to approved business partner.

With Qellus you can. We assist in three easy steps:



[Contact us today](#) for a free consultation and experience a better way to work with Qellus.