

CloudFronts leveraged Microsoft PowerApps for Dynamics 365 Sales Enhancement.

About CloudFronts:

Headquartered in Mumbai, CloudFronts is a 100% Dynamics 365 focused Microsoft Gold Partner helping Businesses around the world to Solve their Complex Business Challenges with Microsoft Dynamics 365 and Power Platform.

Business Requirement:

While we create Opportunity, you are required to create **Quote**, **Quote Line** and **Quote Line Detail** manually which had increased the steps and was quite time consuming. So, there was a requirement to overview **Quote Line Details** on the same interface under **Quote**.

Solution Delivered:

Internally, being on Microsoft eco-system itself, CloudFronts uses Dynamics 365 Sales for managing its sales leads and opportunities. Dynamics 365 Sales app already manages inbound marketing & sales leads, create opportunities, and enable the sales prospect process including quotations and proposals. At each stage in the process from sales lead to opportunities won and project creation, your customers, sales staff, and marketing team members are fully informed, and the process is tracked appropriately using D365 and supporting tools including SharePoint and Office365.

For this, PowerApp was leveraged to quickly access the requirement instead of deploying time consuming code for customization. The result of this customization will result into your sales team readily accessing the newly created D365 Sales interface and able to **view Quote Line Details directly in the same 'Quote Entity' page** instead of accessing different **Quote Lines** manually.

Post Go Live:

Post Go live, the CloudFronts sales team has significantly reduced their time and efforts in managing and viewing the **Quote Line Details**.

Connect with us!

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