



### Dynamics 365 Sales, Dynamics 365 for PSA and SSRS reporting

The CloudFronts team worked with BPMC to provide maintenance and support to their existing Dynamics 365 for PSA module and setting up Dynamics 365 for Sales.

#### About BPM Certified Public Accounting Firm:

BPM is one of the largest California-based public accounting and advisory firms. Ranking amongst the 50 major firms in the US, they have offices across Oregon, Hong Kong and the Cayman Islands. They serve a range of sectors from financial services, technology, life science and consumer business to real estate, non-profits, wine and craft beverages. You can read about BPM at [www.bpmcpa.com/](http://www.bpmcpa.com/).

#### Business Requirement:

BPM wanted a solution that would –

1. Streamline their sales processes.
2. Make customization and enhancements in their existing D365 for PSA for greater capability.

#### Solution Delivered:

CloudFronts commenced its professional journey with BPMC in the December 2017 and continue to work with them. CloudFronts Team helps them every single day to cater to their existing Dynamics 365 for Project Service Automation capabilities. The team rectify and modify their reports, along with adding functionality to their existing PSA implementation.

Further, the team had a review of the critical entities within the Sales module of Dynamics 365 and customized them as per the client requirements and specific business needs. Till date, the CloudFronts team is working with them to upgrade their D365 environments from v8.2 to v9.

SSRS report was developed by CloudFronts Team for Managers to view the availability of Team and their allocations on different Projects.

#### Post Go Live:

BPM went live with the project on 20 July 2018. With the ongoing support and maintenance of Dynamics 365 for PSA provided by CloudFronts, the BPMC team is now able to deliver projects on time without any obstructions while increasing employee productivity tremendously.

By leveraging the enhanced capabilities of D365 Sales module, the BPMC team is now able to provide a robust end-end overview of the streamlined sales process thus increasing productivity and get actionable insights.

*"CloudFronts helped BPM to streamline their sales process through Dynamics 365 Sales and enhance their existing PSA to greater capability."*

#### Key Technologies:

- Dynamics 365 Sales
- Dynamics 365 for PSA (Project Service Automation)
- SSRS Reporting

#### Connect with us!

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