

SUCCESS STORY: FRED IT GROUP

**Connect Wise and Microsoft Dynamics 365 Finance and Operations Integration****About Fred IT Group:**

Fred IT Group is Australia's largest dedicated IT solution provider to the pharmacy industry. Established in 1992, Fred has grown to a team of over 200 talented and dedicated people with extensive in-house pharmacy expertise who design and develop IT solutions for the pharmacy and health industries. Today, they are catering to more than 3000 business customers across Australia. They are credited with offering Australia's first cloud-based management platform developed specifically for pharmacy and market leading dispense solution for retail pharmacy. You can explore more about them here <https://www.fred.com.au/>

Business Requirement:

The client teams were working on ConnectWise, a business process automation Software and Dynamics 365 Finance and Operations, a Microsoft ERP platform. Despite using competent systems, the client faced an issue of disconnect due to the lack of data flow between the two separate platforms.

As a result, there was a need for a solution that would integrate ConnectWise and Dynamics 365 Finance and Operations (D365 FOE) to enable the sharing of processes and business data.

Solution Delivered:

The client relied heavily on ConnectWise as a business process automation tool. 'ConnectWise' is a process automation platform that offers businesses an efficient solution to streamline IT and ITIL, using automation options for availability management, request management, incident management, service reporting, service asset as well as configuration management, change management, service-level management, and knowledge management. The tool's customizable dashboards and reporting features give you a detailed insight into the most critical KPIs. Besides these, it can also be used for ticket management, help desk management, project management, customer relationship management, time tracking, asset tracking, billing and invoicing, technician dispatching, procurement, inventory management, among others.

The client team was already using Dynamics 365 for Finance and Operations, a Microsoft ERP system. Their experience of using two separate platforms resulted in the teams to be less efficient and less productive. Hence, integrating these two applications using database integration technique turned out to be a single sensible solution.

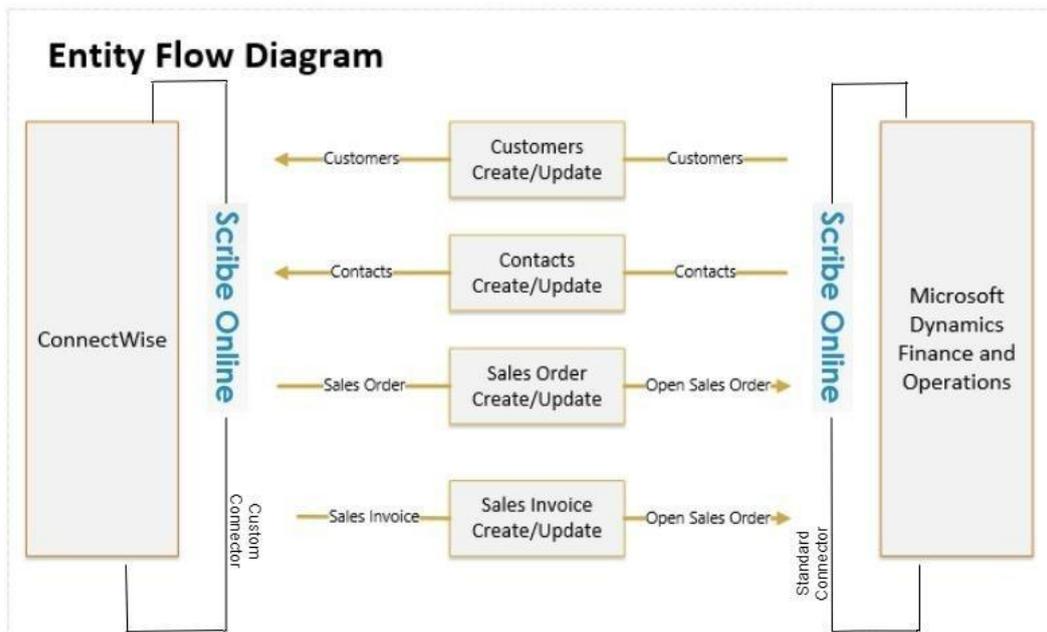
The integration between ConnectWise and D365 FOE was directed mainly for 3 entities:

- a. Customers
- b. Sales Order
- c. Sales Invoice

This was executed successfully by using Scribe Online. Prior to that, a custom connector was developed for connecting Scribe Online and ConnectWise.

"CloudFronts helped Fred IT to carry out ConnectWise and Microsoft Dynamics 365 Finance and Operations Integration."

The below Entity Flow diagram gives a complete knowledge of the workflow.



Key Technologies:

- ConnectWise (CW)
- Microsoft Dynamic 365 Finance and Operations
- Custom Connector
- Scribe Online

Post Go Live:

Post-go-live, the Fred IT team reported the following benefits:

1. The integration now enables the sharing of processes and business data among the two critical applications seamlessly.
2. This has also resulted in increased interoperability between the several departments of a client organization.
3. Automation of the workflow is enabling the teams to focus on other important tasks and completely eliminate work-related stress.
4. Overall, Fred IT is already directed towards making their communication easier, reduces their time and effort, better functionality, improved the control that leads to an increase in the efficiency of the organization.
5. The ongoing MSA contract with CloudFronts is ensuring smooth operations even in the case of several complex issues arising out of existing technology platforms

Connect with us!

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