

Customer Success Story – Optimum Window – Dynamics 365 Sales Implementation & Process Automation

CloudFronts helped US-Based Optimum Window to implement Microsoft Dynamics 365 Sales and automate their sales & order process for operational efficiency.

About Optimum Window

Optimum Window, established in 1985, is a family-owned business based out of Ellenville, in upstate NY. Since then, Optimum Window has become the largest and most diversified manufacturer of Fire-Rated and Architectural steel windows in the United States and has continued its growth with a series of custom high-tech metal window and door systems designed for commercial, high-end residential & landmark applications. Learn more about Optimum Window at <https://optimumwindow.com/>

Business Challenges

Optimum Window was looking to implement a CRM system, automate their end-to-end sales & order processes, and make custom enhancements to suit their specific business needs.

Solution

Optimum Window onboarded CloudFronts as their preferred Microsoft Partner in 2015 to implement Dynamics 365 Sales. Today, they have a Managed Services Agreement (MSA) with CloudFronts to handle their day-to-day CRM enhancements.

CloudFronts enabled Optimum Window to optimize their Sales & Ordering Processes of their Glass & Window Manufacturing using Microsoft Dynamics 365 Sales. The Business Process Flow spans multiple entities in the Sales Cycle ensuring proper updates are being sent out at different phases in the Sales Process to the parties involved in the manufacturing process, and Dashboard Reporting provided them visibility into Orders status. The automation also ensures that website form submissions are added as leads in the CRM. Power Automate Flow enabled automatically moving email attachments to SharePoint Online. Also, Email Automation ensures that external parties are well-communicated. With the ongoing MSA, CloudFronts is helping Optimum Window automate and optimize their Order Process on their Shop Floor and move between different phases seamlessly.

Key Technologies

1. Dynamics 365 Sales
2. Power Automate
3. SharePoint Online

Post Go-live

Post-Go-live, Optimum Window was able to streamline its sales & order processes and automate tasks that ensure peace of mind. With process automation, Optimum Window doesn't have to worry about getting lost in manual processes and can focus on doing what they do best, manufacture high-tech metal window and door systems designed for commercial, high-end residential & landmark applications.

Email us your requirements at ashah@cloudfronts.com or fill out the [contact us form](#).