

Customer Success Story – Maureen Data Systems – Streamline Dynamics 365 Sales Implementation with Power BI Reporting

CloudFronts was selected by US-Based woman-owned IT services and solutions company, Maureen Data Systems to streamline its Microsoft Dynamics 365 Sales implementation with Power BI reporting for actionable insights & data-driven decision-making.

About Maureen Data Systems (MDS)

Maureen Data Systems (MDS) is an innovative technology solutions company that serves multiple global clients. They work primarily with Microsoft but offer a variety of products, services, and solutions across various industries. They assist in building and hosting new environments & applications on and off the cloud, and specialize in securing those applications, servers, and users wherever they may reside. Learn more about Maureen Data Systems at <https://www.mdsny.com/>

Business Challenges

Maureen Data Systems was looking to streamline its existing Dynamics 365 Sales Implementation with Power BI reporting and automate business processes to enable enhanced productivity for its teams.

Solution

CloudFronts deployed a new Microsoft Dynamics 365 environment for MDS and streamline its processes for improved productivity and deeper insights.

This included:

- Setting up a new Dynamics 365 Sales environment in their existing tenant and migrating specific data from their existing implementation.
- Set up Power BI reports to gain actionable insights for data-driven decision-making.
- Setting up Dynamics 365 app for Outlook to enable tracking of communications right within D365 for better relationship management.
- SharePoint Online integration for Document Management in Dynamics 365 Sales entities.
- Automated follow-up notifications & reminders powered by Microsoft Power Automate.
- API integration with Microsoft Partner Center to sync with D365.
- Dynamics 365 User Training to improve user adoption and drive higher ROI.

This is Phase 1 of the project; Phase 2 will focus on additional integrations with existing systems for streamlining MDS's whole technology stack.

Key Technologies

1. Dynamics 365 Sales
2. D365 App for Outlook
3. SharePoint Online
4. Microsoft Power Automate
5. Power BI

Post Go-live

Post-Go-live, Maureen Data Systems is experiencing the benefits of automation and insights to drive enhanced productivity and make data-driven decisions.

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