

Customer Success Story – Invoke

CloudFronts enabled Texas based Invoke to remodify and enhance its customer management capabilities with Dynamics 365 Project Operations.

About Invoke

As a 9x Microsoft gold partner, and 6x Microsoft advanced specialization-endorsed partner based in Texas, U.S., Invoke specializes in providing solutions for critical business needs through modern technologies encompassing systems management, security, data insights, and mobility. You can explore them here at [Invoke \(invokellc.com\)](http://invokellc.com)

Business Challenges

Invoke wanted to fix the below challenges –

1. They used PSA however, it was not fully optimized to accommodate their growing Customer Relationship Management needs and Business Intelligence (BI).
2. They lacked the required sales-specific customizations in Dynamics 365 Sales app to unify and streamline their sales process.
3. Owing to disparate systems like QuickBooks for accounting, and Dynamics 365 for Operations, it reported multiple data entry occurrences from different team members and departments, and hence, repeated errors in reports.

Solution

CloudFronts' Microsoft Dynamics CRM team has been assisting this U.S based Microsoft Gold partner to streamline their *Sales to Billing* for their D365 PSA (now Project Operations) implementation. They continue to evolve Invoke's Dynamics CRM to optimize their processes and provide reports with deep insights on their projects and billing. They enabled customizations built on top of OOB PSA to execute the following Allocation Reports, Billing Reports, AR Reports in Power BI, Project, and Time Entry customization to suit Invoke's operations, Pay Run and Commission customization, Commission reports, 2-way Invoice Integration to QuickBooks, Customer integration to QuickBooks, Automation at different places to expedite the Sales to Billing process and notification at critical junctures, Canvas App for Sales process for initial Scoping.

Key Technologies

1. Dynamics 365 Project Operations
2. Azure
3. Power BI

Post Go-live

Invoke reported the following benefits:

1. All customer accounting information like invoice may be accessed immediately within the Dynamics CRM itself, thanks to the unified and stitched integration between Intuit QuickBooks and Dynamics 365. As a result, the sales team may make better selections based on the purchase history of clients and target potential customers with potential deals.
2. Due to the sales-specific customizations, enhancements, and modifications done on their Project Operations tool, Invoke is now able to optimize its sales processes and manage its accounts and prospects efficiently and effectively.
3. Invoke is now banking on data for its everyday decision making for its core operations by heavily depending on Power BI reports related to Allocation Reports, Billing Reports, Commission Reports and AR Reports.

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