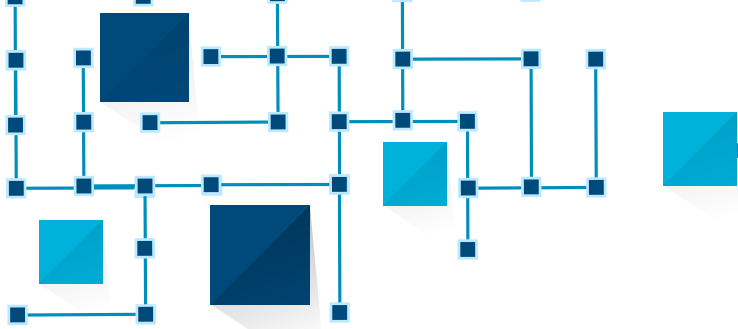# The rapid-start development platform of Microsoft Dynamics CRM

Stories from the field illustrate the faster way to build line-of-business solutions

PrenticeWorx

The rapid-start development platform of Microsoft Dynamics CRM

At the speed of business in a digital world, IT teams need to be ready to deliver process automation quickly. Applications that will support strategic response to market changes need to be rolled out in weeks, not months or years.

While Microsoft Dynamics CRM has been labeled a sales, service and marketing tool, it was originally designed as a platform to simplify managing the interaction between multiple entities. Providing a flexible, secure framework, Microsoft Dynamics CRM can manage and track information and processes around any entity (people, objects, contracts, accounts, any-**thing)**. An often overlooked platform, more and more businesses are realizing the value of the software, often called xRM, managing everything from crops to patients.
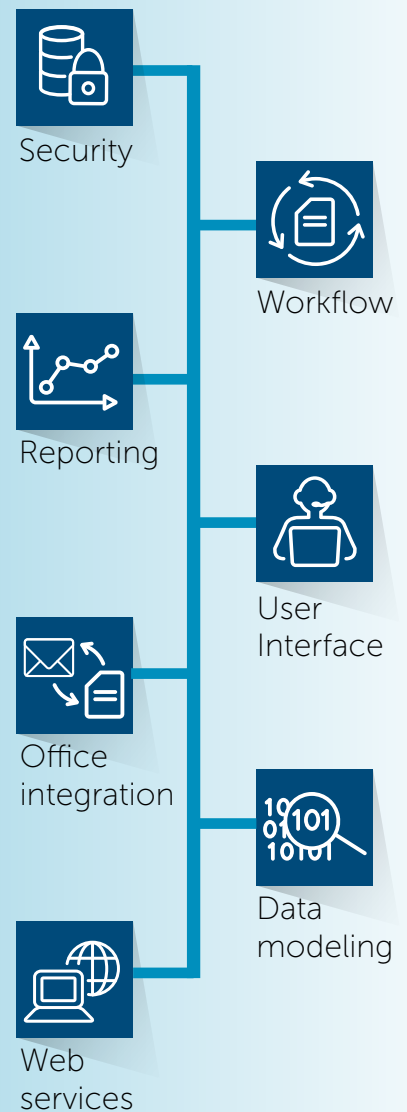
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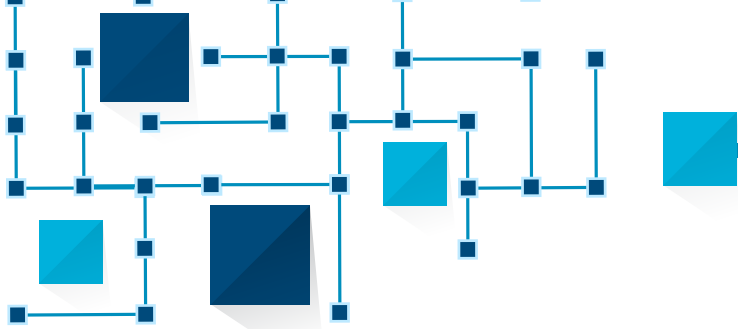
In the pages that follow, we'll show you how Microsoft Dynamics xRM can accelerate your development efforts. To help you envision the possibilities in your own organization, we've included three real-life examples of applications our clients use to manage processes vital to their organization.

Contents

Key features that make Microsoft Dynamics CRM a valuable, rapid-start development platform

Security

Reporting

Office integration

Web services

Workflow

User Interface

Data modeling

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Library Media Collection Management

Project objectives

A world-wide nonprofit organization needed a better system to support their global network of 200+ volunteers collecting historic artifacts. The application needed to support multiple processes related to the valuable items, including:

- Volunteers contact people in possession of personal histories, photographs and other important memorabilia.
- Materials, including documents, audio files, photographs and objects are emailed or delivered to a central location.
- Items are documented and, upon request, returned to the owner.
- Documentation of the artifacts are transferred to the nonprofit's central library catalog system.

Value of Microsoft Dynamics xRM

With the artifact at the center of all processes and ease-of-use for the volunteers a key consideration, Microsoft Dynamics xRM was a clear choice for the project. About 40% of the required functionality was ready out of the box to help the project roll out quickly.

Just some of the many benefits of the Library Media Collection Management system include:

- Advanced security providing protection for the sensitive nature of some documents.
- Support for multiple languages.
- Workflows that coordinate the collection and documentation process and provide instant tracking of individual item status.

Through the Library Media Collections Management solutions, thousands of artifacts have been acquired and cataloged.

Just a few industry examples

Banking and finance	Mortgage management, portfolio management, contract management
Agriculture	Livestock management, crop management, farm management
Educational services	Class scheduling, teacher management, student management
Healthcare	Medication management, patient management, insurance carrier management
Technology	Software subscription management, project management, RFP management
Manufacturing	Warranty management, engineering specs management, batch management
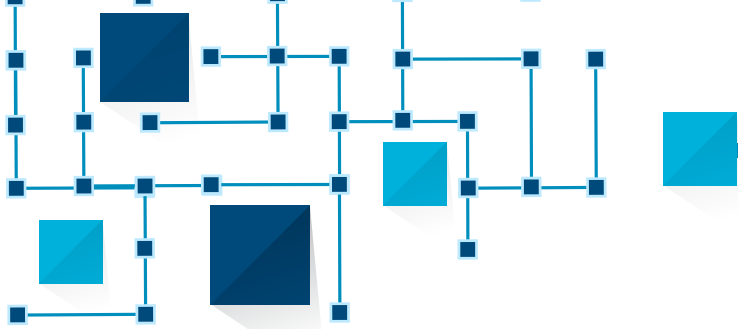
Realize the value of the xRM platform

With the Microsoft Dynamics CRM platform in place, your organization can take advantage of all of the benefits of a Microsoft-built and backed solution, including:

Security

The permission-based security model of Microsoft Dynamics xRM includes security roles for users and objects that limit access to sensitive data while ensuring access to appropriate information.

Workflow

The workflow model supports conditions, branching and custom actions, including sending e-mails or creating additional Microsoft Dynamics CRM records. The workflow engine can be extended by developers, to run workflows across departments and can be implemented by individual users, enabling them to automate some of their own personal workflows.

Reporting

Microsoft Dynamics CRM uses Microsoft Office Excel, Power BI and SQL Reporting Services for reporting. In addition, a reporting wizard helps users create their own custom reports.

User Interface

Custom entities created in the Microsoft Dynamics xRM system will automatically generate a GUI for your users to interact with the data. The user interfaces include lists with customizable views, find and advanced find, editors for all entities, lookup dialogs, multi-tabbed user interfaces and more. Microsoft Dynamics CRM delivers these user interfaces with no programming required.

Office Integration

Users can interact with the Microsoft Dynamics CRM system directly within Outlook. The offline client allows for users to disconnect and still interact with Microsoft Dynamics CRM data while on the road, synching back up with Microsoft Dynamics CRM when they are back online. The Microsoft Dynamics CRM client also enables data to be pulled directly into Microsoft Office Word and Microsoft Office Excel using active data binding. All data in Microsoft Dynamics CRM can easily be imported and exported with Excel.

Data modeling

Microsoft Dynamics CRM supports custom entities with a full set of attributes plus relationships with other entities. Entities include activity records such as tasks, e-mail, phone calls, appointments and service scheduling.

Web Services

Web services support interaction with out-of-the-box entities as well as custom entities created through configuration.

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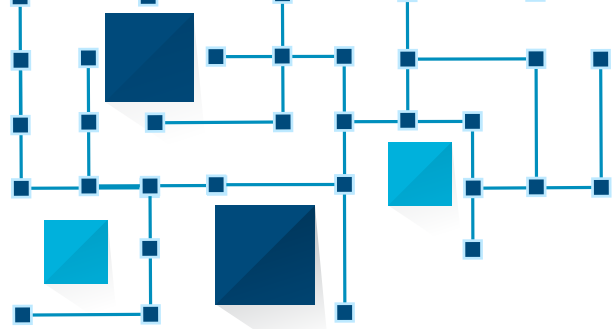
Story from the field:
Healthcare policy management

Project objectives

Created in response to the Affordable Care Act, the Montana Health Co-op (MHC) initial operational systems did not include centralized case management as part of the overall solution. Silos of confidential data made it difficult for MHC employees to support the most basic functions, including:

- Viewing client information—from addresses to eligibility.
- Providing agents with commission information.
- Answering questions about coverage, dependents and premiums.

MHC needed to integrate data from a number of systems to support unified customer service for the insurance agents, group administrators and internal employees serving members in Montana and Idaho.

Value of Microsoft Dynamics xRM

Through Microsoft Dynamics xRM, the full spectrum of connections related to each client's health care policies are tracked, including:

- Dependents of primary members.
- Members of employer groups.
- Agents due commissions on group or individual policies.
- Agent certifications that affect commission eligibility.

Through case management, customer service agents can prioritize tickets for assignment and escalation. Automated workflows, dialog guidance and standard business processes ensure that clients have a consistent service experience. Through the Frequently Asked Question (FAQ) knowledgebase, the customer service team is tracking common issues, using the information to answer questions quickly and improve website content.

Microsoft Dynamics CRM's support for customized data forms and fields allowed MHC to integrate information from various other systems. With centralized data, there are fewer hand-offs and delays.
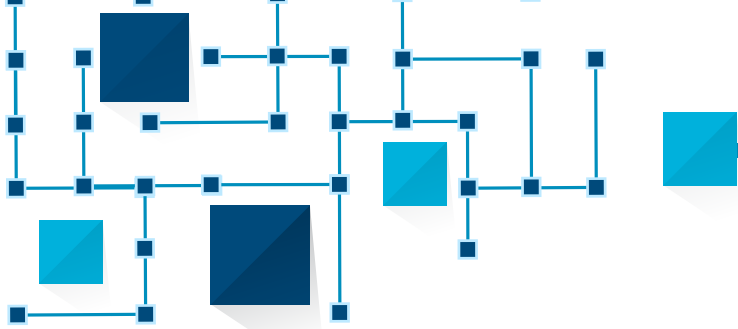
The agile choice for line-of-business apps

The concept behind using Microsoft Dynamics CRM as a platform to manage anything (xRM) developed based on the flexibility of entity relationships. The original intention was to connect all the dots for a customer within the organization. With the dots connected, organizations realized that any entity could benefit from the 360° view and accessibility.

Often referred to as the xRM framework, Microsoft Dynamics CRM provides a flexible, versatile and scalable development platform. Because Microsoft continues to improve Microsoft Dynamics CRM, you get the benefit of new functionality, evolving technology and support for the applications you develop.
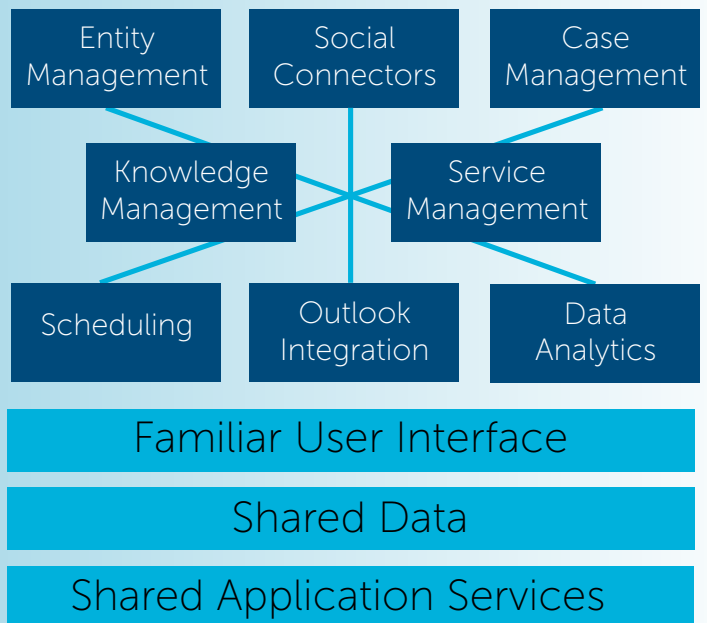
One of the strengths of building an xRM-based line-of-business (LOB) application is how agile the application development process can be. Since you are working with a fully functional program, you can work with users in real time to test and get feedback. With feedback that continues as you build the functionality, you can quickly make changes. Business rules implemented through workflows make it easy to adjust with changing business requirements.
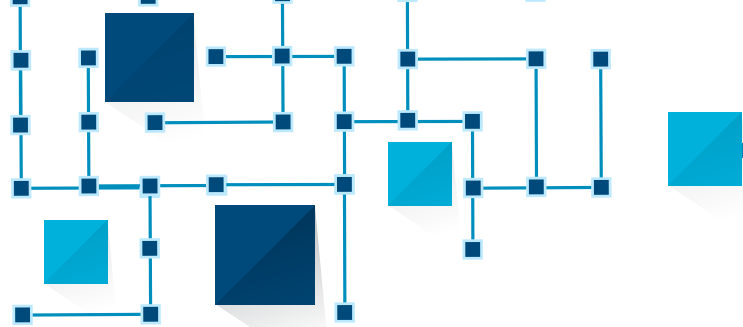
Through an agile development process, your LOB applications can be up and running quickly and providing immediate benefits, such as:

- Out-of-the-box communication and collaboration tools built into and integrated with Microsoft Dynamics xRM to meet specialized business requirements.

- The familiar and intuitive user interface built on Microsoft Office that reduces the user learning curve. Most user interactions can be completed right through Microsoft Outlook.
- Out-of-the-box data visualizations and options to work with data in Excel and Power BI, putting personalized data analysis in the hands of your users.

Mix and match funcitonality of Microsoft Dynamics xRM to fit unique requirements

Entity Management	Social Connectors	Case Management
	Knowledge Management	Service Management
Scheduling	Outlook Integration	Data Analytics

Familiar User Interface

Shared Data

Shared Application Services

Fraudulent claims detection

Project objectives

The Utah Office of Inspector General (U-OIG) monitors compliance with State and Federal Regulations and implements measures to identify, prevent and reduce fraud, waste and abuse. The U-OIG needed to improve detection and intervention of fraudulent claims from Utah Medicaid providers, which was being managed through spreadsheets.

To uncover fraudulent claims, the U-OIG needed to aggregate reporting from medical providers with filed claims.

## Value of Microsoft Dynamics xRM

After an exhaustive search for an off-the-shelf solution, the U-OIG evaluated and implemented Microsoft Dynamics xRM. Medical provider and claims data is imported from Oracle into Microsoft Dynamics xRM.

Through data analysis, case workers and investigators identify questionable activity. A thorough process review identifies whether the claim qualifies for further investigation. The claim and related documents then follow a workflow through an authentication process.

When a fraudulent claim is identified, a receivable is generated and the collection process begins.

During State Fiscal Year 2014, the U-OIG recovered $11,570,604 of inappropriately paid Medicaid funds. With a recovery rate of $5 for every $1 spent, the return on investment of the Microsoft Dynamics xRM solution has been significant for the state of Utah.
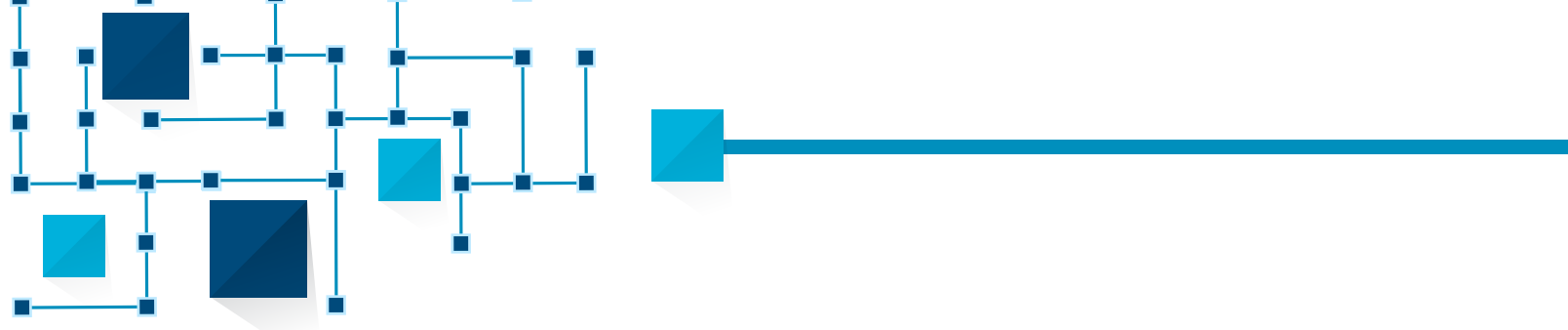
Tailored to your business

Businesses are often faced with choosing between customizing off-the-shelf software or developing LOB applications from scratch. Too often, compromises on capabilities, budget and delivery time for either option make it a choice of the lesser evil.

In many cases, Microsoft Dynamics xRM provides an option that doesn't require the traditional trade-offs. Your organization can get the best of all worlds with a cost-effective, high-functioning platform that can be customized to fit your needs. Your users get the benefits of an easy-to-use application, designed just for them. The IT team builds on a proven Microsoft platform and supports an application that will be easy to maintain.

The PrenticeWorx advantage

At PrenticeWorx, we know how to take the best of Microsoft Dynamics xRM and apply it to your unique business processes. We have the experience to help you define requirements and design a solution to solve even the most complex business process challenge.

Delivering exceptional customer experiences means that every interaction matters. At PrenticeWorx we live by this motto, and we help our clients do the same for their customers.

We are a responsive and personal Microsoft Dynamics CRM consulting company, giving our clients the results they need through out-of-the-box Dynamics CRM, xRM, system integration and business intelligence solutions. We will work cooperatively with your teams to help you achieve the goals you set for your LOB solution, which could include:

- Cross-channel service management
- Case and contract management
- Asset service and management
- Compliance and quality management
- Personnel, patient, customer or vendor relationship management
- ...and so much more

Let's talk about your business challenges to find a solution that fits. Contact us today at info@prenticeworx.com.

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