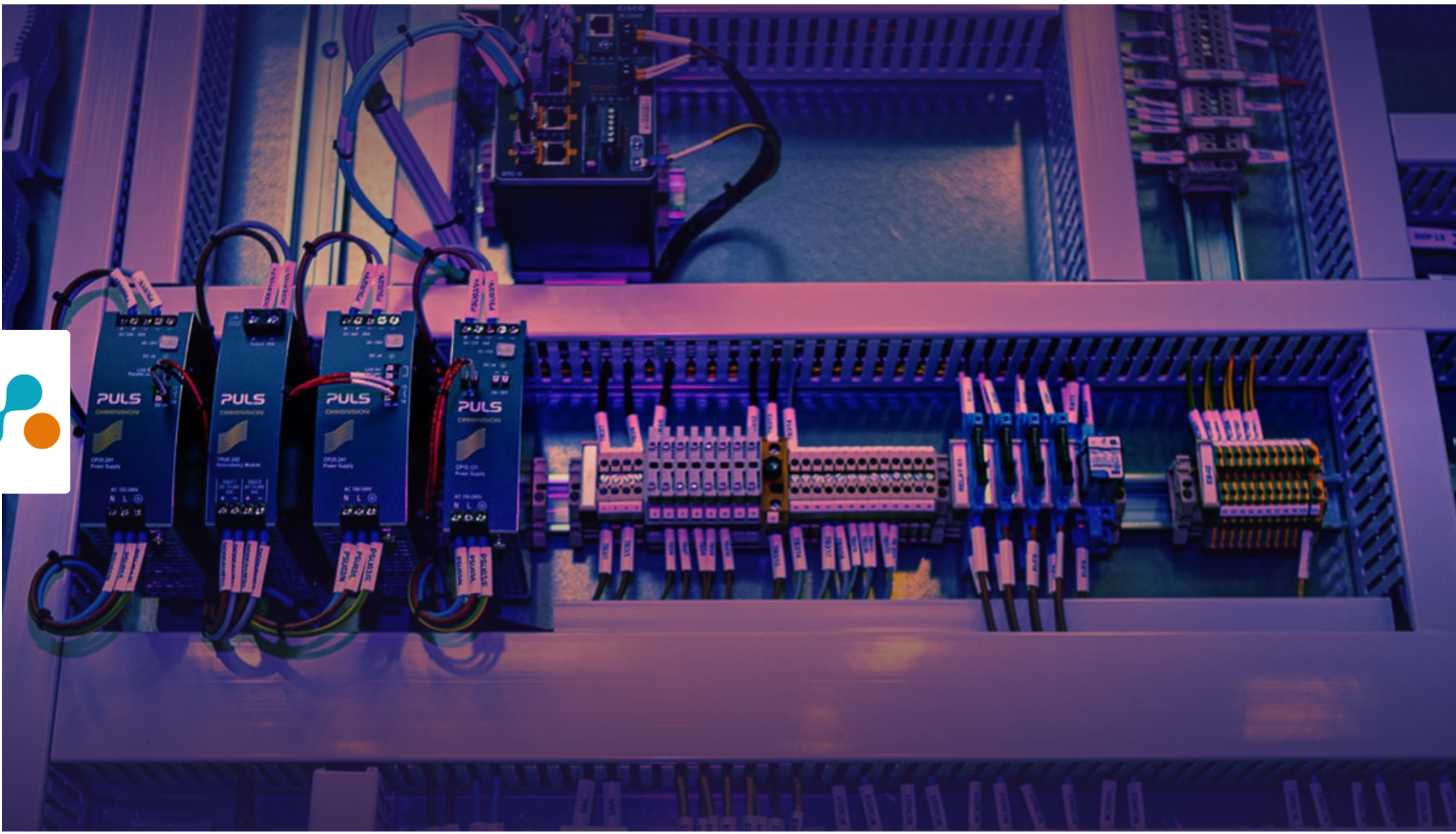


INTEGRATION OF
DYNAMICS 365 CRM



THE CASE STUDY
OPTILAN





Dynamics 365 for Sales with Legacy Integration

Customer

Optilan

Country

United Kingdom

Industry

Security & Communications

ABOUT OPTILAN

Optilan is a worldwide independent security and communications systems integrator. They provide Integrated Telecoms, Telecoms and Transports Services, as well as supporting with Pipeline Integrity Systems and Critical Infrastructure. By applying 30 years of expertise in areas from planning and design to site commissioning and post-installation support, Optilan provides custom fit solutions to even the most demanding projects. They complement this with a curated ecosystem of leading manufacturers, to achieve both high quality and enduring results.

THE CHALLENGE

Optilan were not satisfied with their legacy CRM system and wanted to make the transition to Dynamics 365 for Sales along with all their existing data. They needed to keep a record with fully updated information surrounding all stages in prospect journeys. In order to achieve this, it required customisation of the Account, Contact, and Opportunity entities within Dynamics 365 Sales. It was also crucial to maintain their financial data from their Quote Manager legacy system, so this needed to be integrated with Dynamics 365 Sales.



THE SOLUTION

We completed Optilan's transition to Microsoft Dynamics 365 for Sales, including an import of live data to the CRM to ensure that all opportunities were in the same stage of their life cycle as they were in the legacy system.

Custom fields were created in Accounts, Contacts, and Opportunities to capture information related to prospects, customers, and opportunities. This included a fully customised business process flow in Opportunity to map the opportunity life cycle followed in Optilan.

A single point of access was implemented for 8 locations to ensure easier collaboration across the business. In addition, due to the Power Platform integration, any future changes will not impact the existing data and customisations.

We also integrated Dynamics 365 for Sales with their Quote Manager legacy system so that data could be pushed and pulled between both systems by using Power Automate.

Solution Version & Extensions

- ❖ Microsoft Dynamics 365 for Sales

THE BENEFITS

Mercurius IT collaborated with Optilan to implement a new CRM system which acted as a comprehensive solution for tracking prospect journeys and maintaining key information.

- ❖ A modern CRM solution to improve their sales process
- ❖ Exhaustive information on prospects, customers, and opportunities
- ❖ Opportunities at their appropriate stage in the life cycle with updated information
- ❖ Hassle free real-time update of data due to integration with legacy system through Power Automate
- ❖ Easy user adoption since all data was in a ready-to-use state
- ❖ Streamlined accessibility due to single sign-on across 8 locations
- ❖ Future upgrades will not impact existing customizations due to Power Platform integration