

CASE STUDY

International Building Code Association CRM and Reporting Solution

ABOUT EMTEC®

Emtec is the right size provider of technology-empowered business solutions for world-class organizations. Our local offices, highly-skilled associates, and global delivery capabilities ensure the accessibility and scale to align your technology solutions with your business needs. Our collective focus is to continue to build clients for life: long-term enterprise relationships that deliver rapid, meaningful, and lasting business value.

PACKAGED APPLICATION SERVICES

Emtec is a leading implementer of Packaged Applications. We help reduce costs by streamlining processes and providing application package expertise. We partner with our clients to provide subject matter expertise around the entire lifecycle of your application. Our specialty practices include, Microsoft Dynamics, Oracle Fusion, PeopleSoft, eBusiness Suite, Hyperion and OBIEE.

- ERP
- HCM
- CRM
- BI
- Planning
- Financial Management

Microsoft Partner

Gold Enterprise Resource Planning

CLIENT SNAPSHOT

A member-focused association dedicated to developing model codes and standards used in the design, build and compliance process to construct safe, sustainable, affordable and resilient structures. Most U.S. communities and many global markets choose the International Codes.

THE BUSINESS CHALLENGE

The company lacked an electronic CRM system and was looking for a solution that would support their multiple entities and could be tightly integrated into their current Microsoft Dynamics GP environment.

The firm also had some challenging reporting and invoicing requirements that needed to be met including the need for custom reports and management dashboards.

THE SOLUTION

Emtec helped the client design, install, configure, and customize a multi-organization implementation of Microsoft Dynamics CRM 2011 (on premise) and integrate it into their Microsoft Dynamics GP environment via Scribe Insight server.

During the course of the project, to meet their challenging CRM reporting and invoicing requirements, custom CRM reports and dashboards were developed via SQL SSRS. These custom SSRS reports and dashboards were seamlessly integrated into the Dynamics CRM UI via the Reports object.

The CRM reporting solution provided worked perfectly for them with the exception of how SSRS rendered report output to Microsoft Word. A challenge arose when a user attempted to further edit the rendered Word document. Because the SSRS Word rendering engine placed all rendered Word output into

Word tables to control positioning, alignment and other attributes, these Word tables were often nested multiple levels deep depending on the design of the SSR report. This format caused their staff to spend a considerable amount time editing their Word documents and invoices, with a high possibility for errors.

A CRM reporting solution was needed that would provide users a reliable and seamless way (via the Dynamics CRM UI) to produce Microsoft Word based CRM reports and documents that could easily be edited using data from one or more Dynamics CRM entities.

Microsoft CRM Word Based Reporting Tool

Emtec performed an extensive product search to find a Word based database reporting tool that would exceed their reporting requirements and seamlessly integrate with Microsoft CRM and SQL Server (where Dynamics CRM databases are housed). Emtec selected Windward for its ability to embed data sources and T-SQL directly into Word documents, to retrieve specific columns or selected rows within data tables or even parent-child-grandchild database relationships (customers, invoices, line items). The tool also works with many other data sources and allows for seamless passing of parameters (I.E. CRM object GUIDS).

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CRM and Reporting Solution



TECHNOLOGIES

- Microsoft Dynamics CRM 2011 (on premise)
- SQL SSRS
- Windward

Implementation of Windward Word Based Reporting

The implementation of the Windward tool consisted of two (2) components. The first component was the Windward .NET reporting engine which could be consumed by a .NET application to render predefined Windward Word documents into resulting data based Word documents.

The second Windward component was the AutoTag markup language (plugin) which runs as a Word plugin in the Word UI and allows for data sources and database navigation (T-SQL) to be defined and used throughout the Word document to retrieve columns and rows of data.

AutoTag also allows template designers to take full advantage of the rich formatting features within Word, including styles, tables, charts, shapes and images.

Deployment of Integrated Windward Word Reports into CRM User Interface

Using the Windward reporting tool, Emtec developed a series of data driven Word based CRM reports and invoices that could be rendered while viewing a specific CRM entity record within CRM.

RESULTS

The organization now enjoys an integrated CRM and ERP environment with all of the reporting tools they need to manage the day to day needs of the organization effectively. Their enhanced CRM/Windward word reporting solution provides users with a reliable and efficient method for generating Word documents that contain all of the pertinent CRM and Dynamics GP data necessary to produce client letters or invoices. Their users are now empowered to edit, save, manage and distribute these reports and invoices using the same Word interface that they were already familiar with.

The company has become more efficient and has improved their customer service through more accurate, timely invoices.