

Microsoft PowerApps and SharePoint Online

Automate Business Processes and Facilitate Collaboration



Customer: Champion Windows

Size: 1,001-5,000 employees

Country: USA

Industry: Manufacturing

Profile: Champion Windows is a leading manufacturer and marketer of windows, doors, sunrooms, roofing, and siding products for home and corporate improvement projects.

Services: Microsoft PowerApps and SharePoint Online

Business Need

Champion Windows is a leading provider of custom-designed and custom-manufactured home improvement solutions. It operates in over 77 locations nationwide and has over 50 showrooms.

All of Champion's locations managed incoming leads and appointments manually in Excel sheets. For every location, the manager assigned the lead /appointment to the respective sales rep based on their location through email. Once the appointment was closed, the sales rep had to update the Excel file with the final information, and/or send an email to the manager.

As the entire process was done manually, it was getting difficult for managers to assign location-wise leads/appointments to each sales rep, and get real-time updated information about the lead. Moreover, deciding the next day tasks for the sales rep was always a challenge as well.

Similarly, for the sales rep, it was difficult to manage their daily appointments through email. If, for some reason, the customer postponed the appointment, the sales rep may not have gotten an email notification.

Managing all appointment related information via email or Excel, created a lot of inefficiencies.

The team was suffering from a lack of follow-up, and often risked losing a customer. These issues led to

higher costs for the manufacturer.

In order to get a long-lasting solution to the challenges faced by their users, Champion Windows wanted to develop a system/application that automates and streamlines sales activities, which can be used from anywhere with offline continuity that also provides real-time updates to the managers and sales reps regarding the appointments assigned, and all the activities that happen until the lead or appointment was closed. Synoptek built PowerApps to deliver the business data from multiple data sources to various devices.

Solution and Approach

In order to streamline and automate their manual process, manage sales appointments and improve business outcomes, Champion approached Synoptek to deliver a solution. Their primary objective was to enhance workforce collaboration, facilitate easy access to information, and streamline leads/appointments.

Using Microsoft PowerApps and SharePoint Online, Synoptek developed apps, workflows, and web jobs for the manufacturer to handle all activities in a better way. This involved the following key activities.

Custom Data Application:

This is an Azure web job that dynamically retrieves all the leads from LOB database and pushes it to the

SharePoint list. The existing database was deleted daily and created based on Excel, using the manufacturer's built-in scheduler.

Lead Generation Application:

The lead generation application was a SharePoint custom application that was created for the managers to view and assign leads/appointments to sales reps. The managers can view lead details of the past 15 days, as well as location-wise list of leads and sales reps. Using the app, managers could now assign leads to each location's sales rep. Using PowerApps, the managers can view all of the resulting leads, which are updated by their sales rep.

Sales Rep:

Synoptek built PowerApps for sales rep where they can view/edit all of their assigned leads/appointments, prepare their travel plans based on the assignment, update the feedback and enter final inputs instantly as per their interaction with the client, and finally change the status of the appointment.

Email Notification:

The sales rep receives an email notification of their assigned appointments, details of pending appointments from the last 15 days, and postponed appointments for follow-up, on a daily basis. Their manager receives an email notification of all the cancelled appointments.

Export to Excel:

Being able to export to Excel gave the managers capabilities to export all of the leads/appointments in an Excel spreadsheet using the Export to Excel functionality.

Tools and Technologies:

The above key activities were implemented using the following technologies and tools:

- PowerApps SharePoint customized workflow
- JSOM client-side scripting
- Azure web job
- HTML 5

- Bootstrap
- JavaScript

Business Results

As a result of SharePoint Online and PowerApps implementation, the manufacturer identified a decrease in the amount of time required for managing administrative tasks related to sales appointments. It facilitated automation, along with the following benefits:

- The managers can now view sales rep locations, get real-time updates to plan future assignments, as well as track the activities of each individual sales rep. They can also perform status-wise filter and sorting on all available fields for easy access. This increased the overall productivity of the managers.
- The online and offline functionality helps the sales rep to work anytime - even when offline. This allows for minimal interruption and maximum productivity.
- Each appointment's history is maintained which helps to analyze the customer's requirements for future engagements.
- Automated email notification helps the managers and sales reps stay updated with the latest information.
- Using PowerApps the reps can work from anywhere, anytime using iOS/Android mobile devices like smartphones and tablets.

By relying on Synoptek's wide breadth of SharePoint and PowerApps knowledge, Champion automated their business process, which proved to be a smart and logical business move, reducing all of their manual efforts.

About Synoptek

Synoptek is a Global Systems Integrator and Managed IT Services Provider offering Comprehensive IT Management and Consultancy Services to organizations worldwide. Our focus is to provide maximum "business value" to our clients enabling them to grow their businesses, manage their risk/compliance, and increase their competitive position by delivering improved business results.