Synoptek

Case Study

Driving Operational Efficiency with Dynamics 365 Sales & Customer Service

Customer Overview

Customer

A leading regional solar energy provider

Profile

A leading regional solar installer serving residential and commercial customers across the Mid-Atlantic region, specializing in solar energy solutions, battery systems, and live monitoring services.

Industry

Manufacturing

Services

Dynamics 365 CE Sales, Customer Service implementation & Field Service support

Business Need

The client required a robust and centralized Lead-to-Order Management system to streamline and standardize the process of managing customer inquiries and converting leads into finalized orders. The organization also needed a unified platform to effectively manage customer information, sales activities, service requests, and operational workflows.

Additionally, Customer Service and Field Service capabilities were implemented to improve how customer inquiries and service issues were tracked, managed, and resolved, while establishing seamless connectivity between Cases, Sales Orders, and Work Orders.

Key challenges included:

- Lack of a centralized system to track and manage new leads
- Absence of a structured case tracking and issue management process
- Delays in issue resolution and customer response times
- No streamlined process for managing customer information and interactions
- Difficulty tracking and managing customer communications sequentially
- Inconsistent data capture and lack of standardized operational processes
- Limited visibility into order generation and revenue tracking
- Manual workflows leading to operational inefficiencies
- Limited reporting and analytics capabilities for orders and invoicing

Solution and Approach

Synoptek partnered with the client to implement Microsoft Dynamics 365 Sales & Customer Service Modules using an Agile methodology. Various functionalities were built over time based on the client's evolving business requirements.

Dynamics 365 CRM Sales & Field Service Module Implementation

To meet the client's requirements, Synoptek enhanced the Dynamics 365 CRM Sales module to provide a seamless experience for managing leads and driving them through the sales lifecycle to order generation. Additionally, the Dynamics 365 CRM Field Service module was enhanced to provide agents with a streamlined experience managing customers, cases, sales orders, and work orders.

Key components of the implementation included:

- **Form Customizations:** Customized forms for Leads, Sales Appointments, Opportunities, Quotes, Orders, and other entities with structured tabs, sections, and subgrids for improved usability.

Solution and Approach

- **Conditional Field Visibility & Business Rules:** Implemented business rules with conditional field visibility, default values, and JavaScript-based logic to guide user input and improve process consistency.
- **Security Model & Teams**: Developed custom security roles and configured team structures to provide role-based user experiences aligned to hierarchy and responsibilities.
- **Automated Data Population:** Enabled automatic population of Account, Contact, Campaign, Territory, and related information from Leads into Opportunities, Quotes, and Orders to eliminate redundant data entry.
- **Appointment Scheduling:** Developed scheduling capabilities allowing users to book home visits, office visits, or virtual appointments with customers directly within CRM.
- **Third-Party Integrations:** Implemented multiple integrations to enhance operational efficiency, including:
  - **Smarty Street** for address validation and auto-completion
  - **DealHub** for Quote-to-Revenue (Q2R) and CPQ automation
  - **Solargraf** for streamlined solar sales and proposal management
  - **SharePoint** for centralized document storage and management
  - **Dynamics 365 Business Central** for synchronization of customer records, sales orders, invoicing, and payments

Solution and Approach

- **Queues & Email-to-Case Creation:** Configured mailbox listeners to automatically generate cases from incoming emails while capturing customer and issue details for streamlined support operations.
- **Case Closure Governance:** Implemented controls to prevent case closure when associated work orders remained active, ensuring process integrity and operational accountability.
- **Child Order & Change Order Management:** Designed capabilities to support child orders and robust change order workflows, enabling modifications and rework processes while maintaining continuity in order processing.

Business Benefits

The Dynamics 365-driven solution enabled the organization to significantly improve sales efficiency, customer engagement, and operational visibility. By centralizing lead management, customer service, and field operations into a single platform, the client reduced manual effort, improved responsiveness, and accelerated sales and service processes.

Improved Productivity

Automation of lead management, follow-ups, appointment scheduling, and case workflows reduced manual effort and streamlined day-to-day operations.

Enhanced Customer Experience

A unified 360° customer view enabled faster responses, improved engagement, and more informed customer interactions across sales and support teams.

Centralized Case Management

Customer requests, service cases, sales orders, and work orders were managed through a single platform, improving visibility and operational control.

Faster Sales Cycles

Centralized access to customer history, documents, and interactions accelerated deal progression and improved sales efficiency.

Improved Collaboration

Integrated workflows across Sales, Customer Service, Field Service, and third-party systems improved coordination between teams and streamlined operations.

Increased Operational Efficiency

Automation of routine tasks such as case assignment, escalations, notifications, and data synchronization reduced manual intervention and improved service delivery.

Improved Visibility & Reporting

Centralized reporting provided better visibility into customer interactions, orders, invoicing, and operational performance, enabling more informed decision-making.

About Synoptek

Synoptek is the first IT Managed Experience Provider (MxP™), delivering AI-enabled automation, strategic modernization, and experience-led outcomes. Its services span Cloud and Agile Infrastructure, Business Applications and Platform Development, Customer and Employee Experience, and Cybersecurity. With a business-first approach and a global delivery model, Synoptek helps organizations optimize operations, accelerate transformation, and achieve measurable results—guided by a culture rooted in growth, ownership, inclusiveness, and philanthropy.

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