



# Unified CRM Implementation on MS Dynamics 365 for a Global Air Filtration Corp.

Leading producers of air filters and clean air products

ITC Infotech implemented a **unified Microsoft Dynamics 365 CRM** for a global air filtration leader, integrating US, APC, and Canada divisions. The solution streamlined campaigns, sales, field service, and warranty management, enabling simplified processes and improved customer engagement.

**20 years of data in one 360° view**

ITC Infotech is a leading global technology services and solutions provider, led by Business and Technology Consulting. ITC Infotech provides business-friendly solutions to help clients succeed and be future-ready, by seamlessly bringing together digital expertise, strong industry specific alliances and deep domain expertise. The company provides technology solutions and services to enterprises across industries through a combination of traditional and newer business models, as a long-term sustainable partner.



[www.itcinfotech.com](http://www.itcinfotech.com)

## CHALLENGES

- Difficult to manage different CRM systems for different regions
- Different process for different regions
- Painful integrations and timeout issues since each CRM required custom integration middleware or connectors
- Data silos and inconsistent views due to the scattered data across three different regions
- Rising cost and maintenance overhead
- 20 years of legacy data in three different regions

## SERVICES

- Implementation of Unified CRM with the introduction of the Business Region feature
- Implementation of single MSD365 CRM application for the three divisions – US, APC and Canada
- Simple and unified process covering Campaign, Lead, Opportunity, Quote, Field service & Warranty Management
- Unification of all processes using Unified CRM
- Implementation of Azure function to avoid the timeout issues, SSRS Report generation, OOB Dashboard Reports & Charts
- Azure web jobs, console applications for the manipulation of the existing data
- Automate integration with the client's ERP systems
- Daily ADF jobs configuration to update data from ERP to CRM

## BENEFITS

- Unified customer view and analytics were provided with the Unified CRM implementation
- Operational efficiency and better collaboration across all three regions
- Lowered costs over time with the introduction of Unified CRM
- Single unified system with all users in one system, ease in maintenance from the infra/admin level
- 360-degree data view with 20 years of data visible in a single system