

# Spirit Technology Solutions



## Case Study



## Project Information

### Industry Vertical

- Telecommunications

### Client Base

- Australia

### ERP Product

Dynamics 365 CE  
(Sales)

### Tools

- Power Automate Flows
- Word Templates (XML)



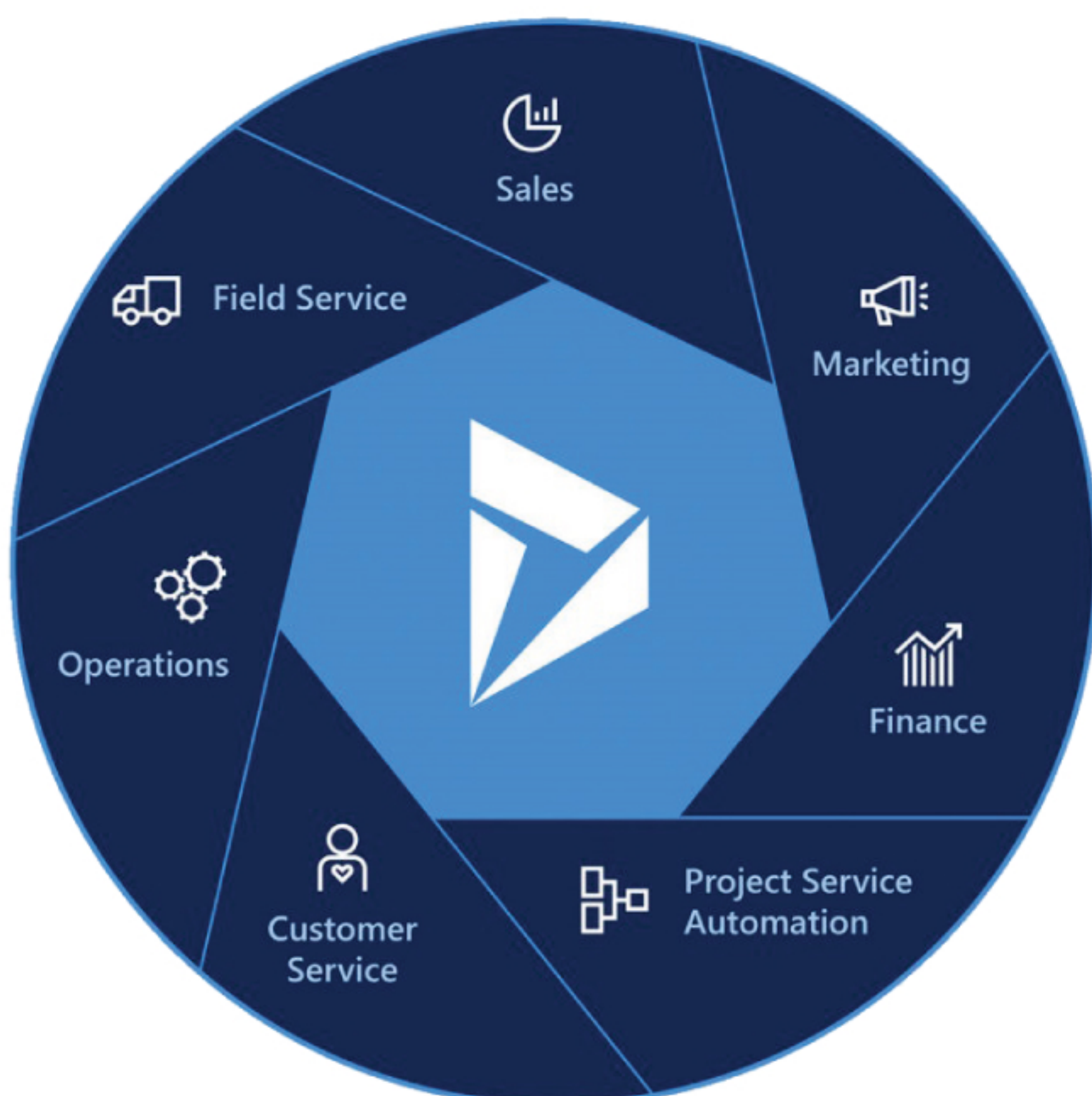


# Pain Areas

- CUSTOMER needed a solution to allow Vendor Financing on selected Quote Products
- The Products needed to be classified as 'Financed Products' & 'Non-Financed Products' based on the user selection
- The Salesperson should be able to generate the PDF for Quote for both type of products in the specified CUSTOMER template (as per Company branding & policies)
- Financial Data needs to be rolled up to Quote level so that the Salesperson can send quote quickly from CRM to customer.
- Each quote will have an option to select from multiple payment terms –
  - 12 months
  - 24 months
  - 36 months
  - 48 months
- Salesperson should be able to view different monthly rentals for each of the payment terms and can select only one which can be applied to customer
- CUSTOMER wants the entire solution to separate from the existing QUOTE solution as it is already cluttered



## Why Microsoft Dynamics 365 CE Sales



### Deployed Solution:

- Export to PDF feature of the Microsoft provided was enhanced to provide this solution
- Salesperson were given the option to start Vendor Financing on click of a button
- The new form will then have various options like
  - To select Payment Terms
  - View monthly rental for various Payment Terms
  - Flag products as 'Financed' or 'Non-Financed'
  - By default, selection of 'Once Off' Products as 'Financed'
  - Allow 'Export to PDF' once all the CUSTOMER criteria are satisfied
  - Generate the PDF documents for 2 templates – 'Financed' & 'Non-Financed' & allow the salesperson to 'Send via Email' or 'Attach in Dynamics 365' (Timeline)

# Propose Solution

---

-  Microsoft Dynamics 365 CE Sales



## Benefits

---

- Vendor Financing Solution in a separate form altogether to provide clutter free experience from other quote functionalities
- On a click of button Salesperson could see various multipliers of Monthly Rental available for available Payment Terms so that its easy to provide suggestions to Customer for Quote finalization.
- Salesperson can easily find the quote products & select multiple products & flag them as 'Financed' or 'Non-Financed' with single click of a button.
- Salesperson can see the Preview of the Generated Document before sending it to customer allowing a review step before actual PDF generation.



## Modules Implemented

---

 Microsoft Dynamics 365 CE Sales (Export to PDF)

# About us



2 Development Centers in India



250+ Projects



70+ Domain Expert Consultants



24 x 7 Dedicated support team & online customer service portal



40+ Addons which streamlines business operation & enhances efficiency



We are Leading partners for Microsoft Dynamics ERP, CRM, Microsoft Azure, Power BI and Office 365

## Service Offerings



**Dynamics 365**  
ERP & CRM Solution for Large Scale Industries



**Business Central**  
ERP & CRM Solution for SME & large Scale Industries



**Microsoft .Net**  
Custom .Net Development services



**Power BI**  
Business Intelligence Tool that connects to 100+ data source and applications



**Microsoft AZURE**  
Cloud Hosting & Development Platform using DEVOP's & Business Application Hosting

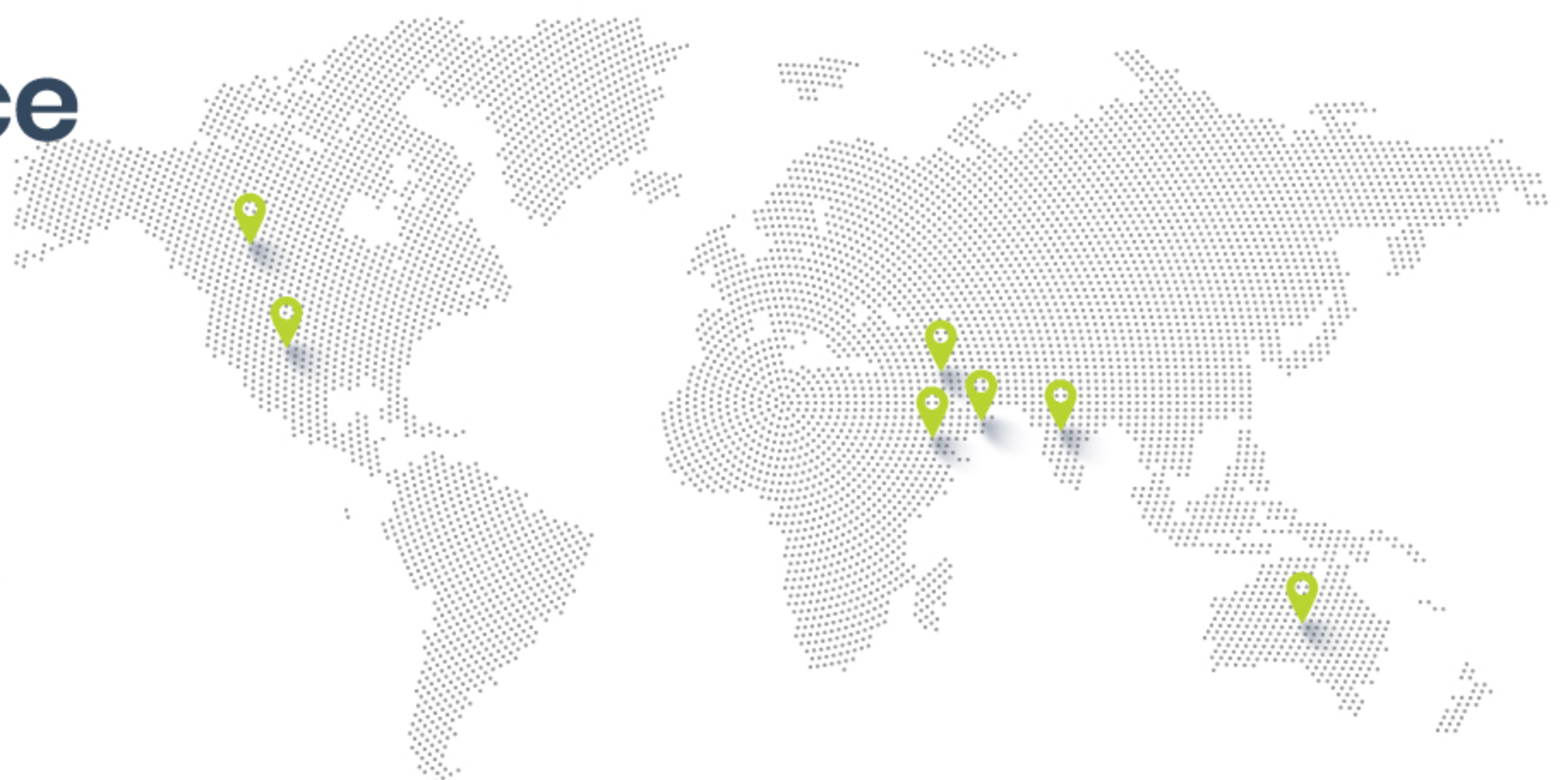


**Office 365**  
Office 365 is a line of subscription services offered by Microsoft as part of the Microsoft Office product line

## Global Presence

Diversified – Global operations in 7 countries

India, Australia, Oman, Saudi Arabia, UAE, United States, Canada.



### Leaping Frog Solutions Pvt. Ltd.



B-810, BSEL Tech Park,  
Plot no.-39/5 & 39/5A, Sector 30A,  
Opp. Vashi Railway Stn.  
Vashi, Navi Mumbai - 400703,  
Maharashtra, India



208-211, Vraj Velencia,  
Near Mahindra Showroom,  
Off, Science City Rd., Sola,  
Ahmedabad - 380060  
Gujarat, India



t.dawalkar@lfspl.com  
info@lfspl.com



www.lfspl.com



+91 7045699266  
+91 2266738131 / 32 / 33  
+61 0420838796