Microsoft CRM in Housing Associations

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Agenda

- Who we are and our experience in housing

- Microsoft CRM, why partners?

- Introduction to Microsoft CRM

- Customer case studies
  - Newport City Homes
    - SharePoint and CRM
  - A2 Dominion
    - Portals
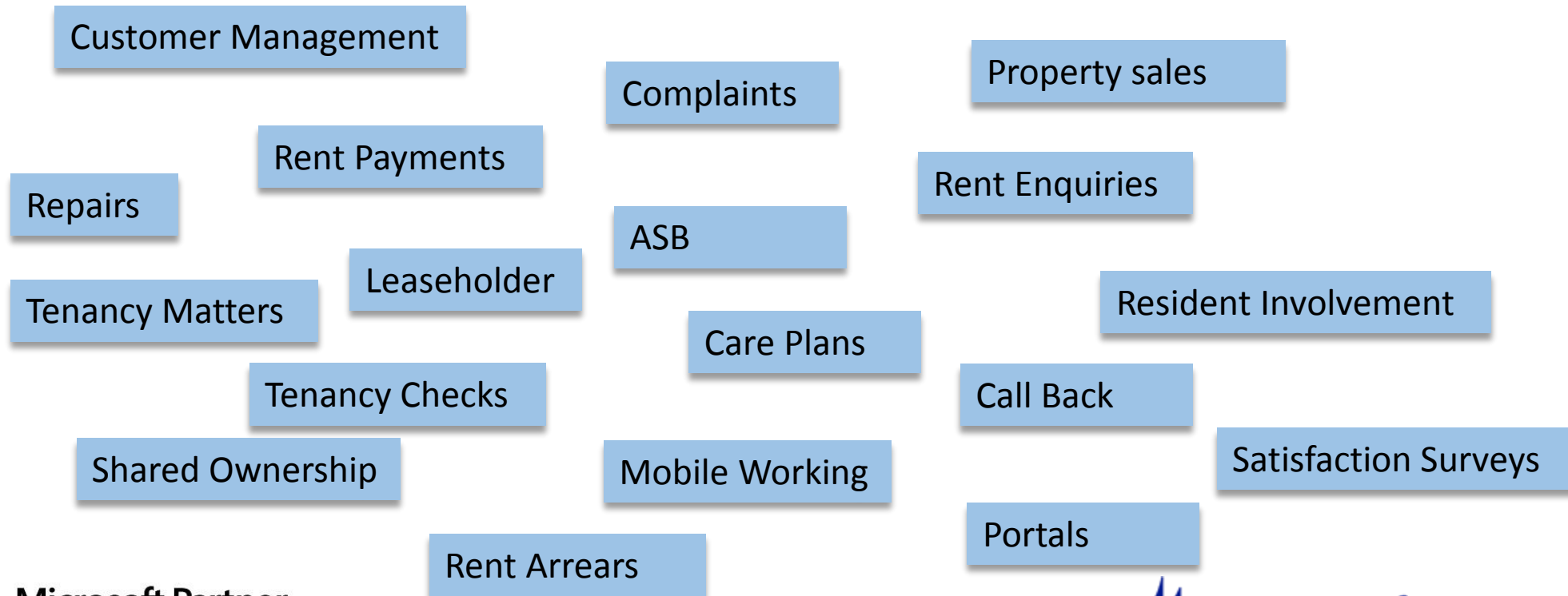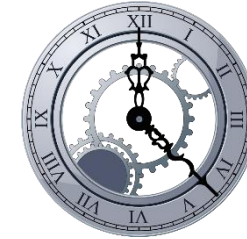 - Amicus Horizon
    - Mobile solutions

Who we are

- A Microsoft partner – formed in 2008
- Consultants and developers
- Specialise in Microsoft CRM - Housing Sector
- Good reputation with customers and Microsoft
- A growing portfolio of solutions

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The Microsoft Dynamics CRM Specialists

Microsoft Partner
Gold Customer Relationship Management
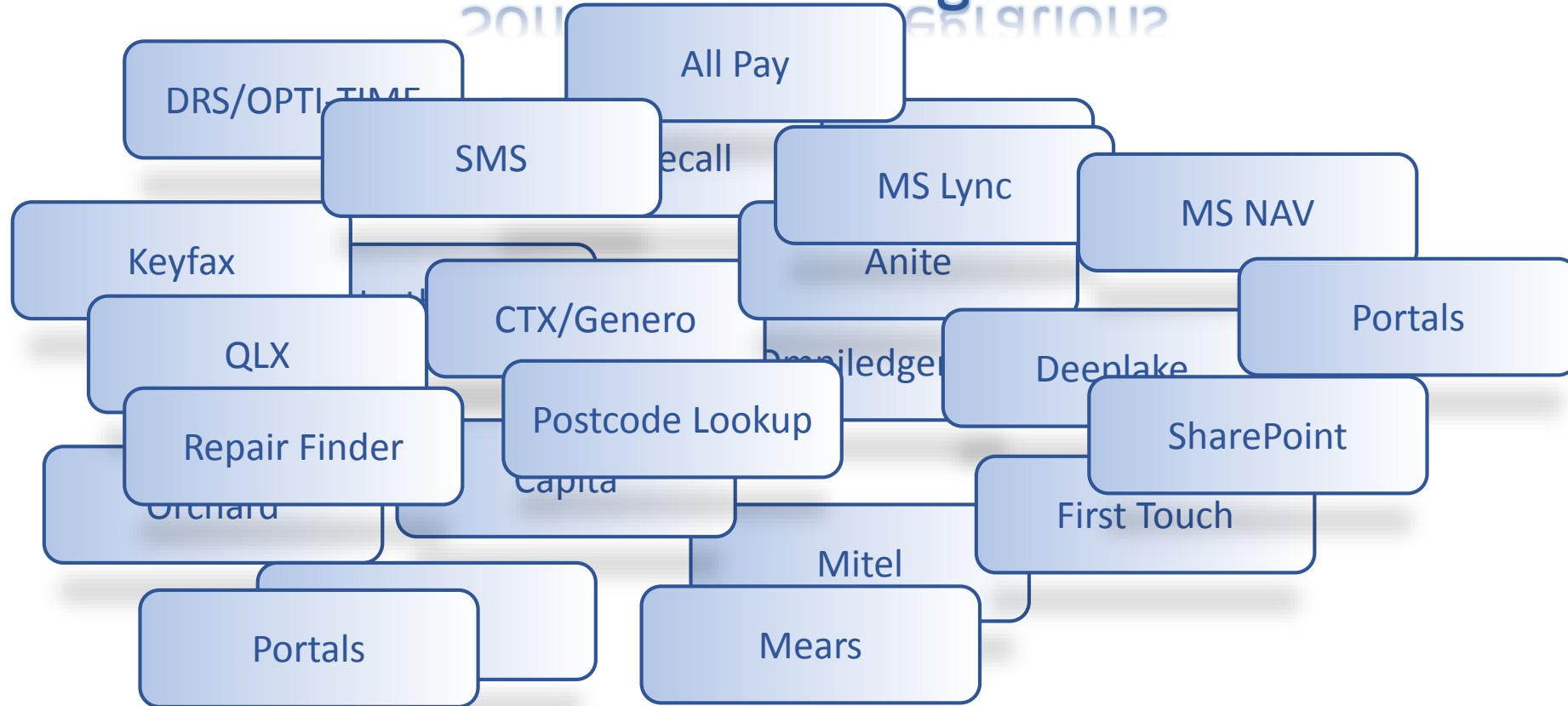
Microsoft Dynamics CRM

What we bring

- Base housing solution

- Individual solutions for different processes

- Implementation skills

- A growing list of integrations

- A good understanding of your business

- Industry knowledge including other solution providers

Goldcrest

Some of the Integrations

DRS/OPTI TIME

All Pay

SMS

ecall

MS Lync

MS NAV

Keyfax

Anite

CTX/Genero

Portals

QLX

Drmiledger

Deeplake

Repair Finder

Postcode Lookup

SharePoint

Orchard

Capita

First Touch

Mitel

Portals

Mears

Our Housing Customers

- Newport City Homes
- Amicus Horizons
- Trident Housing Group
- A2Dominion
- London and Quadrant
- Octavia Housing
- Gallions Housing Association

- Peabody
- Wales and West
- Network Housing Group
- Linc Cymru
- Radian
- Retail Trust
- Aster
- Newlon

SharePoint and CRM

- SharePoint libraries linked to any entity
- Mail-merge directly from SharePoint
- Create a letter activity
- Queue for printing
- Upload documents from CRM or SharePoint

Microsoft Dynamics CRM

Demonstration

- Documents on a case window
- Viewing and uploading documents
- Carrying out a mailmerge

Portals

- Initially worked on a repair logging process

- Used ADX to develop portals

- Contractor portals initially with resident portal to follow

- Allow contractors to access and view cases

Portals

- Provide a real-time view of the data in CRM
- Configurable within CRM
- Can use a variety of validation methods
- Out of the box basic CMS
- Can be fully integrated to the existing website

Microsoft Dynamics CRM

Demonstration

- Logging on
- Viewing summary of outstanding items
- Looking at a list of cases
- Updating a case
- Logging a new case

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Microsoft Dynamics CRM

Mobile Working

- Financial Inclusion
- Integrated to FirstTouch
- Used by Housing Officers
- Create Activities etc. in CRM
- Sourced £130k savings (projected £500k)

Mobile Working

- Completely integrated into CRM
- Can be configured from within CRM
- Online and Offline capabilities
- Available on all popular platforms
- 1 license multiple devices

Demonstration

- Viewing jobs on an iPad
- Updating a case
- Going offline
- Making changes in CRM and synchronising

Contact Details

To find out more information go to our website
http://www.goldcrestsolutions.co.uk

To book a demo or to speak to the someone in the sales team either call 08700610100 or email sales@goldcrestsolutions.co.uk