



CASE STUDY

HOW 1CLICKFACTORY'S WEBSITE & ERP INTEGRATION BENEFITS BOTH EMPLOYEES & PARTNERS ALIKE

1CLICKFACTORY MISSION

Our goal at **1ClickFactory** is to help Microsoft Dynamics Partners reach efficiency and grow their businesses. We have over 100 employees working with innovative technologies to ensure we do our best to help companies worldwide, stay up-to-date with Microsoft Dynamics ERPs. We strive to become the **leading business software factory** providing upgrade, development, hosting, and quality & assurance services to businesses globally via a network of competent Microsoft Partners.

To promote efficiency, the majority of our services are available online, and we have been delivering our online offering to Microsoft Dynamics Partners since 2013. We started by launching two upgrade related tools for Microsoft Dynamics Partners, enabling them to perform **Microsoft Dynamics NAV upgrades** more efficiently by automating the process of moving Classic Reports to RDLC and Dataports to XMLports. Two of our recent releases include an upgrade analyzer (used by Microsoft Dynamics partners for estimating the upgrade project and choosing the best path for their customer-specific upgrade) and the C/AL to Extension Analyzer (used for evaluating the scope of the project, obtaining budget requirements, and planning the next steps for transition). In general, our business portal (website) with its infrastructure enables us to release new online services continually.

1CLICKFACTORY CHALLENGES



CHALLENGE 1:

Inefficient and Time-consuming Upgrade Estimation Process

Prior to 2013, our Upgrade Estimation Engine was managed through email and multiple files. The process was based on Microsoft Dynamics Partners first filling in a .xls file with upgrade related information, then sending it via email to 1ClickFactory and finally, uploading the customer .fob file to FTP.

This involved a number of people, from various teams, being responsible for different tasks. It also meant that managing the process could take months, even for something simple like data collection and especially if changes and updates were required mid-process.

In addition, this estimation process was very unsecure from a data privacy perspective. However, back then it wasn't such an issue as GDPR had not yet been established.

To sum up, this process was very insufficient and time-consuming for all parties involved. We realized these tasks needed to be automated and made available online to drive efficiency.



CHALLENGE 2:

Three Different Systems = More Work and Delayed Access

After launching the online services, we ended up with three different platforms containing customer data:

1. Online Business Portal for Microsoft Dynamics Partners
2. ERP
3. CRM

Since we work solely with Microsoft Dynamics Partners, we needed to ensure we could control the process of how our registered Business Portal users reached our online services. To achieve this, we had to manually check each contact after they registered and if the contact belonged to a Microsoft Dynamics Partner organization, manually approve and then assign rights. In addition to this, we had to record the contact in our CRM and ERP systems.

With all this information being on three separate non-integrated and non-automated systems, it took a lot of time. We essentially had to do double the work, while also increasing the risk of human error by entering data manually.

This process was equally bad for our customers too. They had to wait until we had completed entering their data before they could start using our services. Unfortunately, this meant lots of our leads went cold while we were doing all this manual work.



CHALLENGE 3:

Sales & Marketing Inefficiency

On the subject of cold leads, and looking at our situation from a sales and marketing perspective – the issue of our **Business Portal** users not having access to some information paired with an inability to use the service straight after registration became a point of contention over the coming years.

Initially, after launching, it was possible to manage the convoluted user creation process but as time went on it became more difficult. As we all know, buyer behavior has changed a lot over the last few years with buyers expecting to receive purchases right away. If they can't get what they came for at that moment, there is a big risk they will choose to make the purchase elsewhere.

This was not an easy problem for us to solve, because we couldn't ignore the model we built our business through. We work solely with Microsoft Dynamics Partners and a process for user approval is essential, but we knew we needed to find a solution to reduce this time-frame. In addition, we had sales and marketing-related information for users to access in our **Business Portal**, but no track record of their actions, which was not ideal for lead nurturing.



CHALLENGE 4:

Complicated Reporting, Regardless of Online Activity Trackability

1ClickFactory spent a lot of time on manual processes and missed opportunities to grow by letting leads go cold, but these were not the only issues.

As with most companies, we do monthly sales and marketing related reporting and analysis, which helps us to create actions for improvement based on company goals. However, when it came to analysis and making decisions relating to our online services, the reporting was not only time consuming, but in many cases not even accurate. This was the result of having our customer information in three different disparate systems, often containing conflicting information.

1CLICKFACTORY'S 4 KEY CHALLENGES:



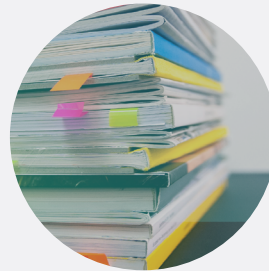
**Very time-consuming
pre-sales process**



**Slow sales and customer
management process**



**Poor use of resources
and inefficient workload**



**Inaccurate information
for reporting**

As a result, we couldn't reach the efficiency and maximum profitability we were striving for. It was clear we needed to integrate our systems and automate part of the manual work. We knew this would make our lives easier and enhance the overall experience for Microsoft Dynamics Partners.

1CLICKFACTORY'S SOLUTION

Since we had an in-house web development team and Microsoft Dynamics Business Central developers it was an easy decision to free up some resources and finally prioritize ourselves. We chose to integrate our ERP with our online [Business Portal](#) for Microsoft Dynamics Partners.

Fortunately for us, to start the project we had all the competencies we needed under one roof – web development team (with a number of skills: .NET, React, Angular, Sitecore, Umbraco, and Azure) and Microsoft Dynamics NAV/ Business Central developers (with upgrade, integration and development skills).

BENEFITS OF HAVING ACCESS TO A COMPETENT TEAM:

Some of the issues and questions raised during the project could be discussed, answered and solved quickly. Based on our experience working with other companies, we saw that what we managed to solve in just one day would typically take a few days to solve elsewhere.

Communication was more fluid. Coordinating web and Microsoft Dynamics Business Central experts is so much easier when they're all within the time zone and located in the same office.

Testing took less time and was easier to implement. There were times, when we conducted testing and fixed several problems multiple times per day.

STATEMENT FROM VILIUS VAICEKAUSKAS

WebServices Department Manager at 1ClickFactory

"It has been a long road since we started our web and ERP integration back in 2013 and it's still an ongoing project. Initially, it consisted of 1 Visual Studio solution with C# code calling ERP services side through Windows Communication Foundation (WCF) technology and then displaying the information in web interface thanks to HTML, CSS, JavaScript.

Throughout the years it has grown into separate code solutions both for Backend (Data transfer from/to ERP based on C#, ASP.NET, SQL, Entity Framework) and Frontend (Web User Interface based on HTML, CSS, JavaScript, Angular, AngularJS) with some supporting Cloud Services running on the Microsoft Azure platform. Over the years, the solution has changed with lots of improvements to the code and overall functionality, with the release of new features on a monthly basis.

In fact, the process has changed so much that people (including internal people and Microsoft Dynamics Partners) cannot even remember a time when the main tools for gathering Microsoft Dynamics Partner requests was done with Excel, Outlook and NAV vs our current Online Platform integrated with the ERP system".



Overall, this integration is an ongoing project. As we face an issue with our process, we fix it based on our needs. Integrating our Business Portal and our ERP allows our teams to work more productively. And, thanks to the integration in general, our Microsoft Dynamics Partners, can save time by accessing services much quicker and use them online 24/7 from any location.


1CLICKFACTORY PROJECT OUTCOME

With the outcome of website and ERP integration, there are two sides to the story.

First, what did we get out of this as a business?

Second, how did our Microsoft Dynamics Partners benefit from

INTEGRATION POINT	VALUE	1CLICKFACTORY BENEFITS	MICROSOFT DYNAMICS PARTNER BENEFITS
User registration	Reduced the time needed for user verification	Automation of manual work Reduced risk of human error	Enables Microsoft Dynamics Partner users to access our online services faster
LIVE status of ordered services	Easier tracking and planning	Elimination of manual work	Enables Microsoft Dynamics Partners to plan accordingly
Downloaded material records and uploaded tasks	Efficient pre-sales management	Enables lead nurturing	1ClickFactory can address Microsoft Dynamics Partner needs better
Invoices	Easier payment management	Enables payment management	Microsoft Dynamics Partners can see all their invoice related information (paid, pending, history) and pay by credit card on the go
Hosting on Azure	Time-saving	Requires less maintenance, manual work, and human interaction. It's safe and secure	It's safe and secure
Monthly updates	Well managed process	Organized planning enables reaction to market changes faster through user experience improvements, new services, or update releases	This is a good user experience and Microsoft Dynamics Partners do not experience any downtime
Online services to order	Accessible anytime anywhere	<ul style="list-style-type: none"> • Reduced manual work for a number of teams • Efficient estimation • Secure and more efficient proposal delivery (e.g. 3 business days for Microsoft Dynamics Upgrades) 	<ul style="list-style-type: none"> • Improved security, efficiency, and availability • Shorter pre-sales time (Microsoft Dynamics Partners can approach their customers much faster after getting upgrade estimates & C/AL to Extensions Analyzer reports)



In conclusion, the website and ERP integration made our life easier by eliminating or reducing manual work and enabled our people to focus on partner experience improvements rather than on boring data-entering tasks. In addition, it helped track sales and marketing-related information to nurture leads and close opportunities better and enabled us to analyze our sales materials and make decisions towards improving them.

From a technical point of view, the system is more secure, much faster and has greatly helped to make our processes more efficient.

The ERP integration positively impacted Microsoft Dynamics Partners by enabling them to access more information online, purchase tools and get free estimates (for efficient upgrades) for faster Upgrade project planning and in most events, without our team's involvement.

Our next step now is simply to optimize our sales and marketing processes and improve user experience. We'll keep you posted on how it goes!

Have questions or need more information about web and ERP integration?

Please contact a [1ClickFactory subsidiary](#) in your country or our service@1clickfactory.com.