



Industries / Real estate

# Boosting Business of Leading Real Estate Client with CRM Solution

OUR CORE VALUES: PASTA - P = Passion, A = Appreciation, S = Simplicity, T = Trust, A = Accountability

## Customer Overview

The project involved working on several tasks such as Customization and Configuration in SMS, SMS from Queue, Case Description of Scheduled Queue & Conversation Module, Entity Creation to Send SMS as SMS Activity, Scheduled Queue Option, Campaign Activity, Distribute Campaign, Campaign Response, Google Drive Integration, and Email Via TaxiMail.

## Project Features

Here are some of the important project features:

- ◆ Workflow Creation which executes SMS.
- ◆ Workflow creation the Queue of the SMS.
- ◆ Question entity to send the Campaign to the Customer.
- ◆ Customized the Account Entity.
- ◆ Ribbon Customization.
- ◆ Created custom plugin for Sending the SMS.
- ◆ Created SMS solution, Schedule solution, Alert & Reminder solution, Winback solution.
- ◆ Created and customization of Distribute Campaign & Campaign Response.
- ◆ Created Business Rules for the SMS Activity.
- ◆ Call Workflow using JavaScript.

OUR CORE VALUES: PASTA - P = Passion, A = Appreciation, S = Simplicity, T = Trust, A = Accountability

## Problem Statement

- ◆ Client wanted to have SMS Activity to send SMS to customer.
- ◆ Add SMS into Queue and then send the SMS in Bulk.
- ◆ The tasks of the Distribute Campaign & Campaign Response.
- ◆ Google Drive Integration.

## Challenges during implementation

Few challenges we faced while developing the system: -

- ◆ Create SMS Solution which can be deployed on other Client CRM also without much modification.
- ◆ Track all the SMS messages whether they were sent successfully or failed. Integrate this solution with other custom entity like campaign, case, opportunity etc.
- ◆ Distribute SMS From Campaign Activity using SMS Channel (Custom) to the contacts of marketing List.
- ◆ Creating the Google API integration for the Client and to access the API after overcoming the cross domain.
- ◆ Sending Email via 3rd party provider i.e TaxiMail from Dynamics CRM Workflow.

OUR CORE VALUES: PASTA - P = Passion, A = Appreciation, S = Simplicity, T = Trust, A = Accountability

## CIS Solution

We have provided solution for sending SMS from CRM. We have created many workflows and plugins for different purposes for example Transfer Opportunity, Schedule Option, Sending Email via TaxiMail, one minute wait, etc.

## Positive Outcome

The CRM solution thus provided makes it easy to perform the tasks on a regular basis. It simplifies various internal processes related to Campaign creation and distribution.



OUR CORE VALUES: PASTA - P = Passion, A = Appreciation, S = Simplicity, T = Trust, A = Accountability

## Technologies used



## Our Achievements



**14+**  
YEARS  
IN BUSINESS



**05**  
WORLDWIDE  
OFFICES



**1000+**  
EXPERT  
TEAMS



**12+** Yr  
WEB  
EXPERIENCE



**7+** Yr  
MOBILE  
EXPERIENCE



**7+** Yr  
MARKETING  
EXPERIENCE



**100+**  
WORLDWIDE  
CLIENTS

US/CA:  
+1888-572-3991

SINGAPORE  
+65-3158-0888

UK/EU:  
+44-020-3318-0351

SOUTH AFRICA:  
+27-87-550-9535

INDIA:  
+91-(731)-6664000

Gain useful insights into your business with our Business Intelligence & Analytics solutions that have a strong backing of our wide-ranging domain expertise and technology skills.

Copyright 2016 - CIS :: One-Stop Technology Services & Solutions!

OUR CORE VALUES: PASTA - P = Passion, A = Appreciation, S = Simplicity, T = Trust, A = Accountability