

A Construction Product Manufacturer

Automating **Sales, Service, and Financial Workflows** with D365 Sales, Field Service, and Business Central



About the Company

A U.S.-based construction products manufacturer and service provider offering end-to-end solutions for windows, doors, glass, and screens across commercial and residential projects. The company manages design, manufacturing, installation, and repair services for clients throughout the region.

Industry

Commercial & Residential Construction

Workforce
500+
Presence
United States

Service



D365 Sales



D365 Field Service



Business Central Integration



Power Platform Enhancements



Mobile App Development



Workflow Automation



Managed Services

Solution

Unified Sales & Service Platform

Implemented Dynamics 365 Sales and Field Service to connect sales, operations, and customer service under a single, integrated ecosystem.

01

Finance & Operations Integration

Integrated Business Central for finance and supply chain management, ensuring seamless flow between quotations, orders, and invoicing.

02

Mobile App for Site Visits

Developed a mobile app enabling technicians to record site data, generate quotations, and track material consumption both online and offline.

03

Automation Across Workflows

Automated end-to-end processes — from site visits to service execution — including real-time updates for dispatchers, technicians, and back-office teams.

04

Dynamic Bill of Quantities (BOQ)

Configured automated BOQ generation during site assessments, directly linked with Business Central for pricing and materials.

05

Customer Feedback Integration

Implemented automated feedback forms tied to completed work orders, enabling customer experience tracking and service quality improvements.

06

Results and Outcomes

- Automated site visit-to-quotation process, improving turnaround time and accuracy.
- Eliminated manual data transfers through full system integration between D365 Sales, Field Service, and Business Central.
- Improved scheduling efficiency and technician utilization through real-time coordination.
- Enhanced visibility into orders, invoices, and service performance across teams.
- Strengthened customer engagement through feedback automation and proactive service management.
- Established a scalable digital foundation supporting future business automation.