Microsoft Dynamics 365 Integration for aBILLity

STANDARD SOLUTION

The Standard Solution for integrating Microsoft Dynamics 365 with aBILLity addresses a major challenge for Communication Providers: ensuring that customer related information is aligned between back office and front end systems, and available to every user, in a single view.

The advantages of deeper customer knowledge span from improved service levels to increased revenue and higher customer retention.

The Standard Solution provides your teams with that added knowledge.

BENEFITS

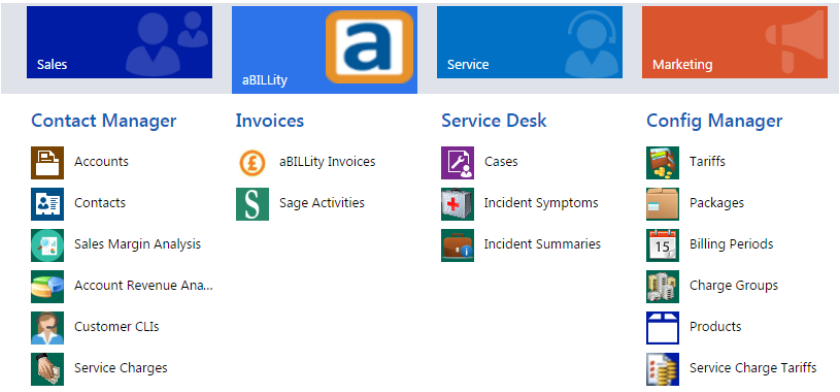
- **Improved service levels**
  Teams are able to deal with customer queries more efficiently
- **Increased productivity**
  Users have access to all the information they need from one single system, completing tasks faster and more accurately
- **Minimise the risk of human error**
  Having the information reflected across both systems minimises manual & error prone tasks
- **Easy and quick to learn**
  Users will be up to speed with minimal training, taking advantage of the same look & feel as Microsoft Dynamics 365
- **Out-of-the-box solution**
  Quick installation with no development required, avoiding additional pressure on your IT department

Connect Microsoft Dynamics 365 with your aBILLity billing system

Increase your team's efficiency by providing them with all the information they need to serve your customers faster and more efficiently.

QGate's Standard Solution for Dynamics 365 & aBILLity gives your teams visibility over the aBILLity billing system, in a completely secure way. Users in roles as diverse as sales, technical support, marketing or field service, will have access to billing information, usage, and other information previously not available to them, without the risk of compromising the financial system.

This single customer view will also avoid common mistakes such as manually entering the wrong data, or scheduling an equipment installation with a customer that has outstanding invoices. Avoiding these bottlenecks is a huge step into a healthy relationship, where customers' queries are immediately dealt with.



Serve better, sell more

Having visibility of each customer's information gives you the chance to present your customers with products and services that make sense to them, at the right time. By knowing when a contract expires, which products or services are included in that contract, or even if that customer exceeds or only uses a small part of what they're paying for, it's easy to be proactive and propose a more tailored offer.

On many occasions, this will allow you to sell more, but more importantly, it helps increase your customer retention rates, by continuously tailoring your offerings to each customer and by showing that your business is all about presenting the best solution for the customer.

Microsoft Dynamics 365 Integration for aBILLity

KEY FEATURES

> Accounts
Access all account related information and assign Service Levels

> Contacts
Displays all contacts stored within your aBILLity contact manager section

> Cases
Includes all tickets that have been created within the aBILLity Service Desk

> Invoices
View information on all invoices generated in aBILLity

> Customer CLIs
Contains all CLIs assigned to any customer, stored in aBILLity and related usage

> Sage activities
Requires the Sage integration module. Shows active Sage accounts linked with the most recent bill, and payment method

> Account Revenue Analysis
Categorises different types of revenue and provides a summary by customer

> Sales Margin Analysis
Contains information from the Sales Check tool within aBILLity's Revenue Assurance

> Service Charges
Contains information on all services added to any customer within aBILLity

Empower your teams to achieve more

The Standard Solution allows users to navigate through aBILLity specific areas within your Microsoft Dynamics 365 system. Here are some examples of what users can do, much faster:

MANAGE CONTACTS & ACCOUNTS

The solution gives access to Accounts, Contacts, Agents and Carriers. Allows users to take ownership of individual accounts and create new Customers, Agents or Carriers. The information is then reflected in aBILLity, keeping both systems aligned and updated.

ACCESS REVENUE & MARGINS

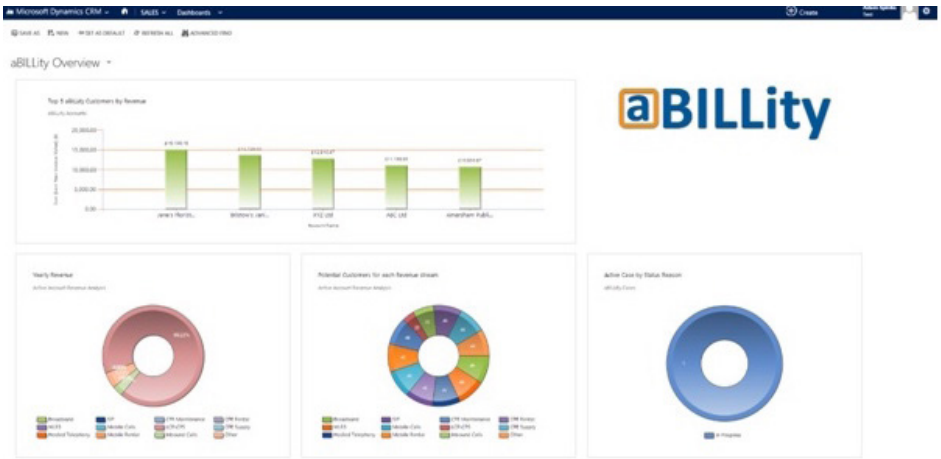
Provides information on the different categories of revenue streams, showing month/year revenue broken down per product. Includes summaries for different methods of call routing, such as CPS, mobile and inbound.

VIEW DETAILED INVOICES

Users can see all invoices created and dispatched within aBILLity. By clicking on the invoice number they can access more detailed information and see exactly what is being charged. From this screen, users can also access the Sage Activities section (if the Sage Integration module is installed), where they can see payment status.

VIEW CASE RELATED INFORMATION

Users can create new cases in Dynamics 365 and make that information available to those using aBILLity. This is especially important to ensure a full visibility over a customer's status, keeping everyone on the same page and capable of providing customers with updated information.



We make CRM work

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