

IQubz

Professional Services

*Customer Relationship Management (CRM)
Data Warehousing, Business Intelligence (BI), Reporting and Analytics*



Optimal Solutions as Unique as your Business

IQubz Professional Services team delivers the most optimal solution for your business problems with the perfect understanding of your objectives and requirements the first time. Our team consists of application specialists, project managers, functional and technical experts with in-depth industry experience and domain knowledge. We are a Microsoft partner and our solutions are built on Microsoft technology platform. Our experience covers a vast range of industries including retail and wholesale distribution, hospitality, field service, financial services, mortgage lending, banking and manufacturing.

Business Process Automation

Centralize customer information and streamline business processes with a solution that offers unmatched user adoption and business productivity.

Customer Relationship Management Implementation

- Requirements analysis
- Marketing campaign setup
- Outlook Client for CRM setup
- End-user training
- Go-live support
- On-going support

Customization

- Custom entities (forms, fields, views)
- Workflow configuration
- Reporting wizard reports
- Reporting Services reports
- Excel reports
- Word/Mail-merge templates

Data Integration

- Accounts and Contacts data migration
- Legacy system data migration
- One-way or two-way data integration

Enterprise Reporting

Get a 360-degree view of your financial, operational, sales and marketing functional areas. Increase your revenue, reduce costs, and gain competitive advantage.

Data Warehousing

Data Integration and Consolidation

- Requirements analysis
- Data Warehouse schema design
- Extract-Transform-Load (ETL) from disparate data sources
- Multi-dimensional databases (cubes) development

Business Intelligence

Dashboards, Scorecards and Reports Development

- Consolidated multi-company reporting
- Side-by-side comparison of companies, branches and regions
- Financial, sales, services, operations and marketing analysis
- Period-over-period, budget and forecast comparisons
- Most/least profitable customer analysis
- Predictive revenue modeling

Reporting & Analytics

Report Models and Reports Development

- Reports authoring and management
- On-demand web-based and scheduled email reports delivery
- Intranet / extranet reports server
- Exportable to Excel, PDF, CSV and other formats
- Ad-hoc reporting capabilities

IQubz Advantage

- Solutions built on industry-standard technology and platform
- Web-based architecture, built from the ground-up on .NET Framework
- Easy to deploy across the enterprise - hosted or on-premise
- Efficient customization to your unique needs
- Scalable as your business grows
- Role-based security
- Superior features and usability
- Enthusiastic adoption by all users
- Small, skilled, agile team

IQubz Professional Services

Focus. Expertise. Experience.

TECHNOLOGY PLATFORM AND TOOLS

Our team has functional expertise and technical skills to develop seamless, tightly integrated custom solutions using the tools appropriate for your project.

- **Microsoft Dynamics CRM:** Customization tools and .Net Framework for custom application design and development
- **Microsoft SQL Server Database Engine:** Data warehouse design and development
- **Microsoft SQL Server Reporting Services:** Report models and reports development
- **Microsoft SQL Server Analysis Services:** Multi-dimensional databases or cubes development
- **Microsoft SQL Server Integration Services:** Data integration (extract, transform, load or ETL) from and to any data source
- **Scribe:** Data migration, one-way and two-way integrations between Dynamics CRM and other systems
- **SharePoint Server and Excel Services:** Comprehensive BI portal for reports and scorecards delivered over the web
- **PerformancePoint Server:** Author and manage key performance indicators (KPI), business scorecards, and executive dashboards
- **Microsoft Office Excel, VBA and Visual Studio:** Custom dashboards and scorecards delivered in Excel

PROFESSIONAL SERVICES TEAM

Our team consists of application specialists, project managers, functional and technical experts with in-depth industry experience, and domain knowledge. Our team members are certified in the following technologies.

- **Microsoft Dynamics CRM Certifications:** Installation and Configuration, Application and Customization
- **Microsoft SQL Server Certifications:** Implementation and Database Design
- **Microsoft Dynamics GP Certifications:** Application and Dexterity Development
- **Scribe Certifications:** Scribe Insight and Scribe Workbench Development

TRAINING SERVICES

Our trainers are highly qualified to provide administrator and end-user training to your staff, on-premise or over the web, on the solutions developed and deployed by IQubz.

- **Manuals:** Administrator guides, user manuals, step-by-step guides and reference manuals
- **Training:** On-premise classroom training or remote web-based training

SOFTWARE MAINTENANCE AND SUPPORT

Our support and development teams are committed to providing you timely assistance with IQubz solutions and services.

- **Support:** Report incidents via email, web or phone; Monday to Friday, 7 AM to 7 PM Pacific
- **Help and Resources:** Access KnowledgeBase articles, newsgroup posts and CustomerSource website with a license or subscription to Microsoft Dynamics CRM

TO LEARN MORE ABOUT HOW IQUBZ PROFESSIONAL SERVICES CAN HELP YOU IMPROVE PRODUCTIVITY AND YOUR BOTTOM-LINE,
CALL +1 (949) 861-3330 OR EMAIL INFO@IQUBZ.COM.

Solutions built on:



+1 (949) 861-3330

www.iqubz.com

4121 WESTERLY PLACE, SUITE 201
NEWPORT BEACH, CALIFORNIA 92660 USA

IQubz®

Improving business IQ