NDIS CRM in Power Platform

A Cloud Base CRM Solution for NDIS Providers to Manage Participant, Representative and Staff Information.

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NDIS Providers Use Multiple Systems and Disconnected Data that Cost Them Highly.

NDIS providers deal with participant/client, representative, and staff information on day-to-day basis. They use multiple systems to manage the information and other records, which in turn cost them otherwise savable money and time. NDIS CRM provides a single system to do all jobs from one place. This solution saves them from filling up many forms manually by generating the forms from data stored in cloud.

CHALLENGES

Using multiple systems for daily tasks make NDIS providers lose their time and money. Manual filling up of forms eat up their most time. No direct communication with participants and representatives from the system

IDEAL SOLUTION

NDIS CRM is the answer to the challenges. It harnesses the power of Dynamics 365 and Power Apps. We built this with NDIS providers' requirements on mind.

DESIRED OUTCOMES

With NDIS CRM solution NDIS providers use a single system to manage participant, representative, and staff information. It generates forms from data stored in cloud. It enables the providers to communicate with participants and representatives directly from the CRM.
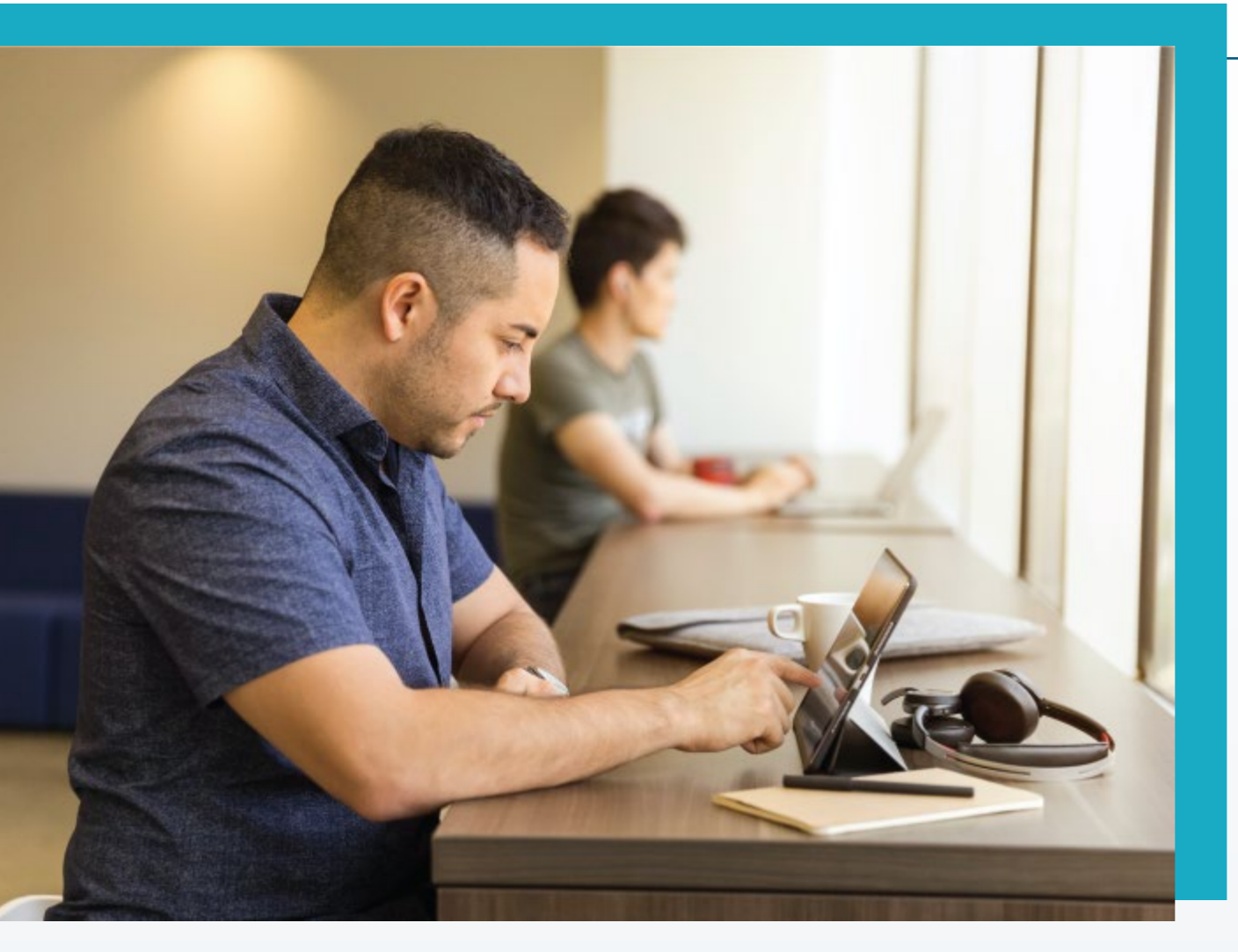
NDIS CRM

A single system for managing participant/client, representative, and staff information. With the solution, no manual form filling up. Instead, it generates them from stored data. Seamless integration with Microsoft solutions such as SharePoint, Teams, and Outlook, etc.

1 CONTACT MANAGEMENT

Manage participant and relevant information, and documents in the CRM.

2 NO MANUAL FORMS FILLING

The CRM solution we provide generates all the forms from data stored in cloud. Bid adieu to your manual works.

3 ANYWHERE, ANYTIME, ANY DEVICE

You can access your information and documents from anywhere, anytime and any device thanks to its seamless integration with Microsoft 365 suites.

Smart App Business Solutions Provides NDIS CRM built on Power Apps, Dynamics 365, and Microsoft 365

As our solution capitalizes Microsoft's business application Dynamics 365, it gives customers all wonderful functionalities of the application. Using Power Apps make the solution more customizable and extendable. Customers will manage everything from a centralized home. Single system and no-manual works facilitate efficiency and productivity. Free flow of data across Microsoft Dataverse accelerates data-driven decision making.

DIRECT COMMUNICATION

Communicate with participants and representatives directly from CRM solution.

ACTIVITY MANAGEMENT

Activity history is available as a timeline. Every activity – emails, tasks, appointments – is tracked in Microsoft Outlook and in NDIS CRM.

DOCUMENT MANAGEMENT

All participant's documents are stored in SharePoint and linked to the participate. Documents can be accessed in a few clicks.

Customer success: StarLight Care

"Smart App Business Solutions has given us a solution to access our CRM with all NDIS participants information in Single Sign-On with Microsoft 365. We are also impressed with the way they automated template data populated from Dynamics 365 and email automation. Our information, documents and communications are all in one place now."

— Hasan Muse, Operational Manager, StarLight Care

Single Sign-on
The customer can access all information and data with Single Sign-on in Microsoft 365.

Template Automation and Centralized Communication
Generating all forms from stored data instead of filling them up manually. Communicate directly from CRM and all communications are stored as related information.

One Place
Now the customer access its information and documents from a centralized home.

Smart App Business Solutions' NDIS CRM

Call for more information: 1800 72 27 28

Ask a question via email: info@smartappbs.com.au

Learn more: https://www.smartappbs.com.au

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