



CHALLENGE

A leading water management company had outgrown its order entry and invoicing process. It had been using a sophisticated set of interlinked Google Sheets to capture contract details and orders for water management, monitoring, and testing services. This information was manually transferred to Microsoft Dynamics GP Sales Order Processing module for invoicing. **Challenges included:**

- Missing, duplicate, or incorrect invoices
- Scheduling errors and missed appointments
- Delayed invoices and missing revenue
- Limited insight into expiring contracts or purchase orders
- No complete source of data for reporting and revenue forecasting

SOLUTION

Corterra built a new, integrated solution that automates the ordering, invoicing, and reporting processes. The solution provides the client with a new order entry application that is the single source to capture order details. It also automates management and monitoring of order changes, creating change logs for user and system updates to orders.

We integrated Microsoft Dynamics GP and the Power Platform so customer and invoice data could be shared between systems, while eliminating dual data entry.



CASE STUDY

Order entry and invoice automation with Microsoft Power Platform and Dynamics GP

Industry: Water management

Company size: \$20 - \$30 million

Technologies:

- Microsoft Power Platform (Dataverse, Power Apps, Power Automate, Power BI)
- Microsoft Dynamics GP
- Google G-Suite

This allowed us to consolidate and automate the invoicing and reporting processes. Role-based security at user and team levels enables the client to control and protect data access, enabling a salesperson to see their own sales.

Built on the Microsoft Power Platform, the solution uses PowerApps for order entry and data management, Dataverse for data storage, Microsoft Dynamics GP for invoicing, and PowerBI for analytics and reporting.



RESULTS

Corterra's experts solved this challenge with a smart, efficient approach using Microsoft tools designed specifically to help small to mid-sized companies improve their operations without costly and inconvenient disruptions. Without implementing an entirely new ERP system, Corterra's solution empowered the client to seamlessly manage and scale their order entry and invoicing operations as they continue to grow.

Results include:

- Consistent, complete, and on-time invoicing
- Increased accuracy and consistency of order data
- Full insight into rolling 18-month forecast
- Easier management of order lifecycle
- Increased control over billing and revenue
- Happier customers
- Foundation set for future migration from legacy Microsoft Dynamics GP to Microsoft Dynamics 365 Business Central

ABOUT CORTERRA SOLUTIONS

Corterra Solutions offers IT infrastructure, ERP implementation, cloud migration, cybersecurity, and analytics services that help medium and large clients operate and grow their businesses securely, efficiently, and intelligently. As a Microsoft Gold Partner, Corterra has extensive experience with Microsoft technologies, including Dynamics 365. Our deep partnerships with clients, coupled with our reputation for outstanding service, give clients freedom to focus on meaningful work that drives their companies' success. For more information, please visit www.corterrasolutions.com.