

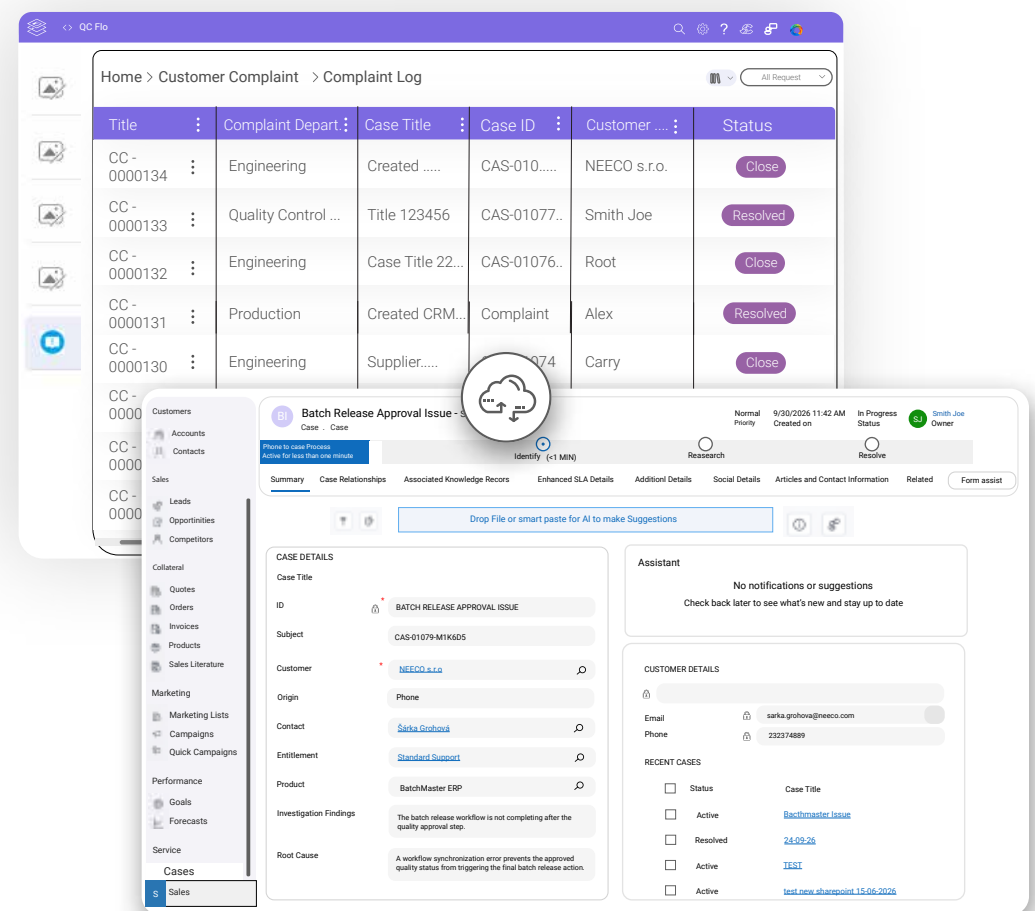
QCFlo for Microsoft Dynamics 365 CRM

Connect Customer Information with Quality Workflows for **Faster Issue Management**

Overview

Customer cases, feedback, product information, and service history can provide valuable input for quality management. When this information remains separate from QMS activities, quality teams may lack the context needed to investigate customer issues and take timely corrective action.

QCFlo connects relevant Microsoft Dynamics 365 CRM information with quality workflows, enabling customer cases and feedback to flow into complaints, quality events, and other QMS processes. Investigation findings, root-cause information, and closure details can then be linked back to the CRM case, providing traceability from the initial customer issue through quality investigation and resolution.



The Challenges

- Customer cases and feedback are disconnected from quality workflows
- Manual entry of CRM data into complaints and quality records
- Limited customer and product context during quality investigations
- High-severity cases may need structured corrective action
- Quality findings and root causes are difficult to trace to the originating CRM case
- Service history and quality records remain in separate systems

Disconnected CRM and quality activities can make it harder to maintain context and traceability throughout issue resolution.

The Solution

QCFlo connects relevant Dynamics 365 CRM data with quality workflows, allowing customer and service information to be used within the appropriate QMS processes.

This enables:

- Connect customer and service information with relevant QMS processes
- Bring CRM activity into structured quality workflows
- Link CRM records with related quality activities
- Support corrective action for defined customer issues
- Connect quality investigation and closure information with CRM cases

The result is a connected record of the customer issue, quality investigation, corrective action, and resolution.

Key Capabilities

1. CRM Case-to-Quality Workflows

- Bring relevant Dynamics 365 CRM cases into QCFlo as complaints or nonconformances
- Manage customer issues through defined quality investigation workflows
- Initiate CAPA for high-severity cases based on defined integration rules

2. Customer Feedback as Quality Input

- Bring customer feedback into QCFlo as quality events or issues
- Associate reported concerns with relevant customer and quality records
- Link customer input to the appropriate quality follow-up

3. Connected Customer and Product Context

- Associate QCFlo records with CRM accounts and contacts
- Link relevant product information to quality activities
- Maintain traceability between customers, products, and related quality records

4. Service History in Quality Activities

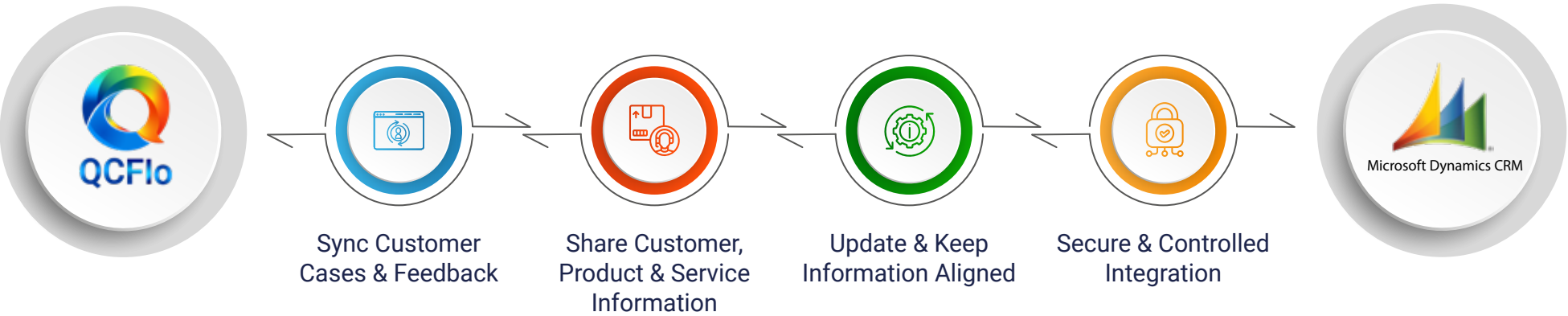
- Link CRM service orders with QCFlo incidents, returns, and inspections
- Bring relevant service information into associated quality records
- Connect service activity with related quality investigations

5. Quality Findings and Closure in CRM

- Map QCFlo investigation findings to corresponding CRM case fields
- Map root-cause information to the relevant CRM case
- Map closure comments to the CRM case and update case status when the QMS transaction is closed

6. Configured Data Exchange

- Exchange relevant data between Dynamics 365 CRM and QCFlo through APIs
- Retrieve CRM and QCFlo data through API-based integration
- Support defined data exchange requirements between the systems



Business Impact

 **Better Quality Decisions**

- Make better decisions with complete issue context
- Assess customer issues with greater clarity

 **Stronger Customer Experience**

- Respond effectively to customer concerns
- Build confidence through consistent issue handling

 **Faster Issue Resolution**

- Address customer issues sooner
- Accelerate investigation and corrective action

 **Greater Operational Control**

- Improve coordination across quality and service
- Strengthen accountability for quality outcomes

About QCFlo

QCFlo is a cloud-based quality management system that centralizes and automates quality processes, helping organizations improve visibility, compliance, and traceability across their quality operations.

Get Started

Connect SAP Business One data with structured quality workflows using QCFlo.

Visit www.qcflo.com

Request a Demo