Dynamics 365

CASE STUDY

DYNAMICS 365 PARTNER:

2B Solutions Inc.

WEB SITE: www.2bsolutions.com

MICROSOFT APPSOURCE:

https://aka.ms/AA33vra

LOCATION: Birmingham, AL, USA

ORG SIZE: 6 employees

DYNAMICS 365 PARTNER PROFILE:

2B Solutions Inc. specializes in applications built on Microsoft Dynamics 365 that allow customers to manage their resources. 2B Solutions differentiates itself through focus, value, and innovation.

Microsoft | Go-To-Market Services

Legal management solution built on Dynamics automates processes and ensures integration

"Because customers were telling us that they needed a legal management solution to work with the Microsoft products they were already using, it made sense to build 2B-LAW 365 on the Dynamics 365 platform. We knew that we could integrate seamlessly with everything else Microsoft has to offer." – Jeff Cross, CEO, 2B Solutions Inc.

- **SITUATION**

  Over several years' time, Frier Levitt's matter management system (Time Matters) had proved increasingly incapable of growing with the firm. The system was not cloud-based and couldn't communicate with the firm's Microsoft products, producing data silos and bottlenecks. Frier Levitt had two system requirements: It had to work within the Dynamics 365 environment and it had to be HIPAA-compliant. 2B Solutions believed it had the answer.

- **SOLUTION**

  Because it was built on the Dynamics 365 platform, 2B-LAW 365 complies with HIPAA requirements and seamlessly integrates with other Microsoft products. 2B-LAW 365 automated many of the processes and workflows Frier Levitt had in place, making the firm more process-driven and task-driven. 2B-LAW 365 enables users to access records without having to leave Outlook. Emails can be flagged and automatically linked to records, which helps centralize data.

- **BENEFITS**

  Dynamics 365 offers a flexible architecture for companies like 2B Solutions to build on, facilitating integration with other Microsoft software.

  Partners can monitor all matters and get up to speed quickly without having to leave the familiar Dynamics 365 environment.