

## Dynamics Integration Using The Connection Manager™ for Dynamics™ CRM and SL

*Sophisticated organizations require an integrated, 360° view of their customers – however, connecting CRM and ERP systems to provide this can be time-consuming and technically demanding.*

*A business solution based on the Connection Manager™ for*

*Dynamics™ CRM and SL enables you to integrate the Dynamics™ products in a timely and cost-effective manner.*



“ You can spend millions to do some real slick integration work, but if it does not give a big business benefit, it does not make sense to do it. ”

**Robert Bois**  
AMR Research

### The Business Challenge

Under continued pressure to do more with less, companies can achieve efficiencies from integrating customer and financial information between applications. The challenge is to make this integration happen with simple, flexible technologies that will generate a rapid return on investment. Solutions that integrate a company's line of business applications to provide a holistic customer view promise increased value from prior investments and a significant increase in worker productivity. Enterprise solutions designed to bridge this gap require large financial and resource investments to implement which can be a roadblock for small and mid-market businesses who are looking to maximize the value of Microsoft Dynamics™ CRM and SL.

Challenges experienced today integrating Dynamics™ CRM and SL:

- **Resource Availability.** Internal staff and financial resources are scarce.
- **Domain Knowledge.** Familiarity with both systems is required to ensure a smooth transition to an integrated environment.
- **Solution Complexity.** Detailed technical knowledge is required to implement and administer many available solutions following go-live.
- **Time-to-value.** Pressures exist to provide turn-key solutions that increase business agility.

### The Solution

The Connection Manager for Dynamics™ CRM and SL provides a robust, cost-effective, turnkey integration solution to seamlessly share information across your line-of-business applications. The Connection Manager provides business experts a simple and powerful tool to design and implement an integration between Dynamics™ CRM and SL.

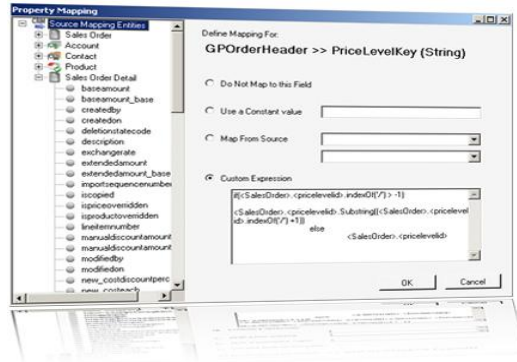
With a solution based on the Connection Manager, organizations can attain the following benefits:

- **Increased productivity and reduced errors through a reduction in duplicate data entry.**
- **Faster time to implementation based on a proven set of baseline integration mappings.**
- **Visibility across business processes and organizational functions.**
- **Real-time access to information improving decision making**
- **Reduced time spent on administration of information and data**



*Intuitively map fields from source application to their equivalents in the target application.*

*Data processing functions enable expressions to be interrogated at runtime supporting the most advanced integration mapping requirements.*



## Features and Functionality

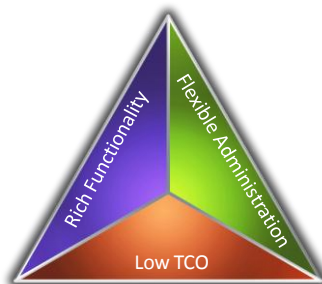
- Graphical mapping interface for bi-directional exchange of data providing entity and field level flexibility.
- Turnkey implementation providing ease of implementation and flexible administration.
- CRM web service and SL web service support to ensure adherence to business logic.
- Advanced data processing functions.
- Selective business process enablement.
- Audit event viewer for logging and transaction details.

## The Integration

A successfully integrated solution using the Connection Manager for Dynamics™

CRM and SL can help lead to increased productivity, lower total cost of ownership, and faster time-to-solution by providing the following integration options:

- **Customer Information.** Both CRM Accounts and CRM Contacts can be integrated to Dynamics™ SL as customers reducing the amount of duplicate data entry.
- **Order Information.** Create orders in Microsoft CRM and allow them to flow seamlessly to Dynamics™ SL. Status updates, shipping notes, and other important information entered in Dynamics™ SL can then be pushed to CRM for complete visibility by the sales team.
- **Invoice Information.** As invoices are generated in Dynamics™ SL, values and payment status pass easily to CRM to allow the sales and marketing teams to have complete visibility into a customer's status.
- **Project Information.** Allow Dynamics™ SL to master your project information by integrating it in real-time to Microsoft CRM.



*Affordable Flexibility*