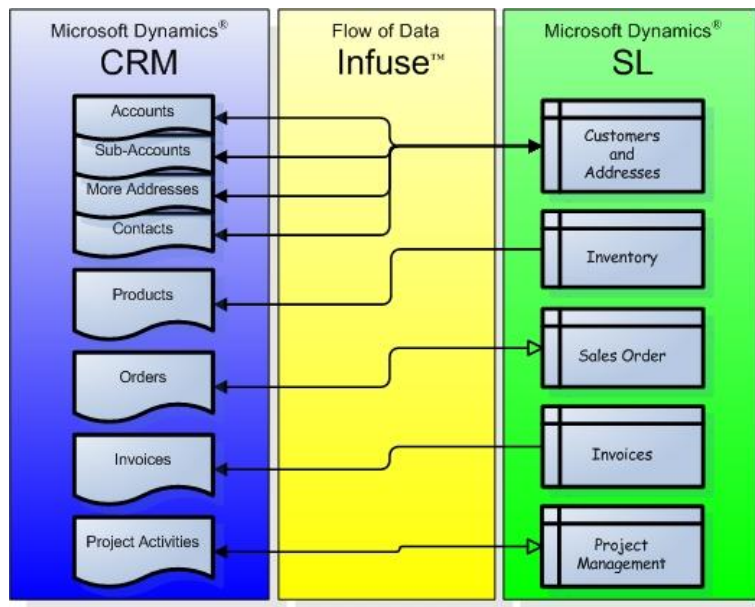


Integration Solution for Microsoft Dynamics CRM and Microsoft Dynamics SL

Infuse is the connection between Microsoft Dynamics® SL and Microsoft Dynamics® CRM that helps you focus on business opportunities by eliminating information gaps within your enterprise. *Infuse* maximizes your Dynamics CRM and Dynamics SL investment by supporting key customer-related business processes. This integration enables both applications to share customer-focused information and recognize critical data from both systems, thereby allowing you to see one consolidated view of your customers.

Short implementation time, predictable costs, tangible results!

Infuse supports four major business processes:



Intelligently integrate customers, orders, products and projects between Dynamics SL and Dynamics CRM in real-time and/or on a scheduled basis. Make these two great products work as one great solution.

Customer Integration synchronizes customer information between Dynamics CRM and Dynamics SL, eliminating duplicate data entry and enabling you to always work with the most up-to-date customer information.

Order Integration provides a completely automated order process between the Dynamics CRM and Dynamics SL applications, including continuous updating of the order status information in Dynamics CRM and storing a read-only version of the invoice in Dynamics CRM.

Product Integration enables Dynamics CRM and Dynamics SL applications to work from the same pricing, product, and product availability information, and provides access to customer product history to ensure you have the latest information on customer orders and their buying habits.

Project Integration between Dynamics CRM and Dynamics SL Project Series enables the right view of the project in the tool that makes the most sense. Project Manager will manage the project in SL while Customer Service Representatives will use CRM to manage their project related activities.

Business Benefits:

- Improve your “Quote to Cash” process by maximizing your visibility into sales activities and minimizing the time between quotes, making the sale, and receiving payments.
- Increase revenue by executing on product-focused sales campaigns and generating accurate sales quotes.
- Retain more customers by having a complete and consistent customer profile across your systems.
- Lower your selling costs by streamlining your quote and order processes, eliminating duplicate data entry, and ensuring accuracy in your orders.
- Rev up your marketing effectiveness by having your Dynamics SL sales history by product, customer, geography, time frames, etc. in Dynamics CRM.

Infuse™



Walk Before You Run

Implementing Infuse does not have to happen all at once like some other ERP/CRM offerings. It is often desirable to turn the integration on in stages, in a manner that makes sense to your organization. Maybe you aren't ready for a fully-integrated order process, but want the benefits of improved information in Dynamics CRM. Infuse is designed so you can turn on only those points of integration that you desire. Then later, when you want more data exchanged between the systems, it can easily be done.

Customer Intelligence

By integrating your customers' product purchase history into Dynamics CRM, you can combine critical customer information with your sales productivity system. Bringing these together not only supports better decision making, but enables your entire team to instantly act on those decisions, taking your sales and marketing organization to a whole new level of execution, a level your competition will be unable to match.

Product Type

Visual Basic Customization
SQL Server Stored Procedures
Custom Order Steps

Supported Microsoft Versions

Microsoft Dynamics SL 6.5, 7.0
Microsoft Dynamics CRM 3.0, 4.0

Technical Requirements

Infuse requires the installation and configuration of these Dynamics SL Modules:

- *Dynamics SL Accounts Receivable (AR)*
- *Dynamics SL Order Management (OM)*
Not required for CRM Account and SL Customer only integration
- *Dynamics SL Customization Manager (CU)*



Business Activity Views and Alerts

Infuse provides proactive customer activity monitoring which allows your sales team to receive alerts and e-mail notifications for action items that are attached to new customer purchases. These alerts can be created as activities in Dynamics CRM and even include the customer order information via an html presentation for *instant* access at their fingertips. Proactive alerts can be set for activities such as large orders, orders shipping late, accounts placed on credit hold, overdue invoices, etc.

Single View of the Customer

Your sales team will have a single snapshot of the customer, including their product history, right in the Dynamics CRM system, eliminating unnecessary down time while trying to locate answers. Now, whether they are on the road or at their desk, your sales team will have the **power to enhance and maximize the total customer interaction.**

Keywords

Integration
Microsoft Dynamics SL
Microsoft Dynamics CRM
ERP
Customer Relationship Management
Scribe Insight
Infuse
EHTC

Pricing Information

Please contact your Microsoft Business Partner for availability and pricing information

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