

VISION PEOPLE®

VisionCRM Connector

Two systems – working as one



- *Give your Microsoft Dynamics CRM users up-to-date information straight from Microsoft Dynamics NAV*
- *See actual customer, sales, and price related information in Microsoft Dynamics CRM.*
- *Correct data in Microsoft Dynamics CRM, directly from Microsoft Dynamics NAV*

REQUIREMENTS:

VisionConnector objects (comes with the VisionCRM Connector)
Windows 2000 or 2003 with Application Server and MSMQ
Change Log (Component for Microsoft Dynamics NAV)

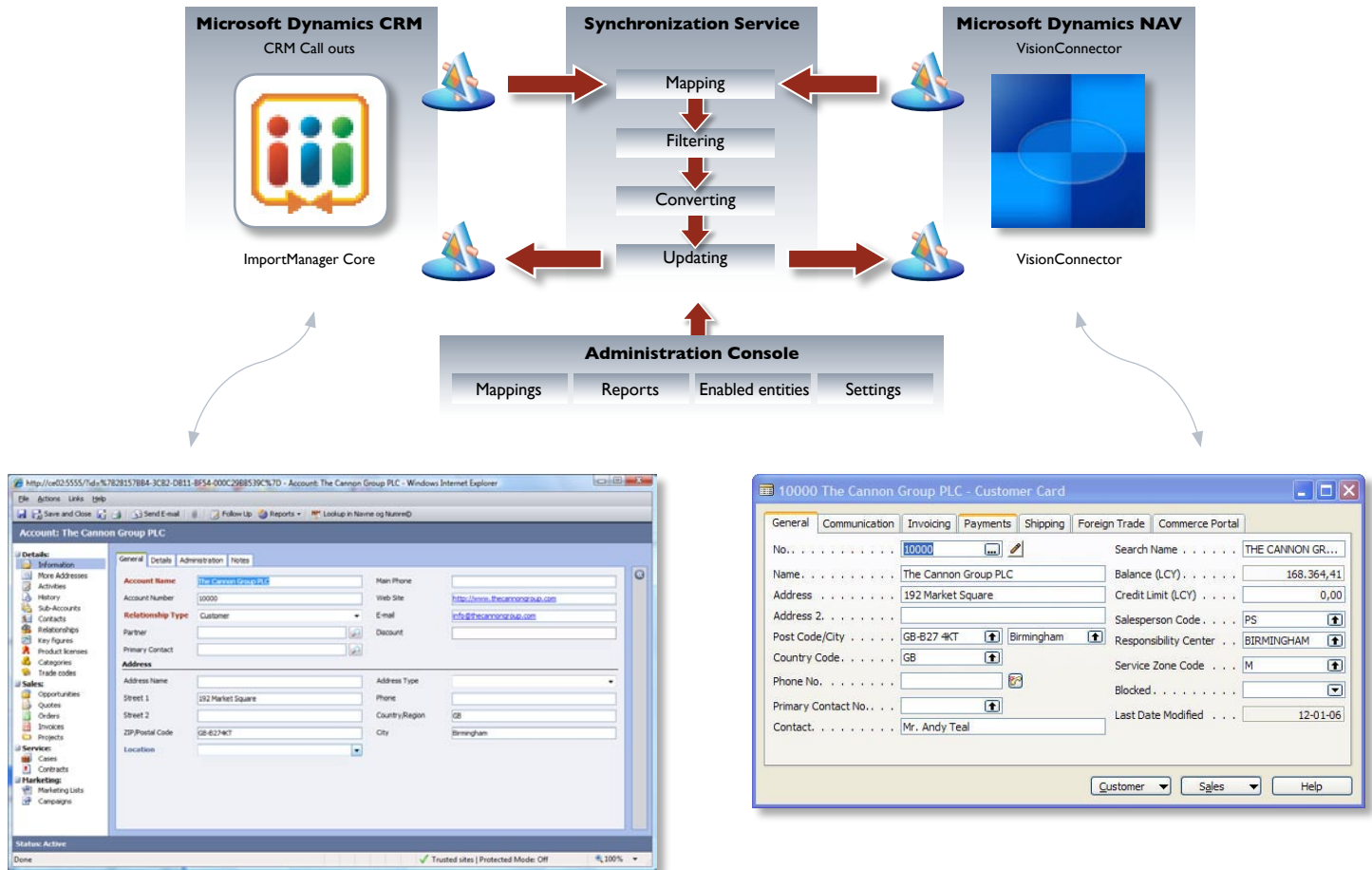
Also applicable to Microsoft Dynamics NAV Native database.
VisionCRM Connector uses VisionConnector technology for data transfer.

VisionCRM Connector flow

Seamless real time integration between Microsoft Dynamics CRM and Microsoft Dynamics NAV:

With VisionCRM Connector, the best of two worlds are seamlessly connected. Microsoft Dynamics NAV- and Microsoft Dynamics CRM users gain significant benefits with the integration of both systems.

The illustrations below give an overview of the design and message flow within the product.

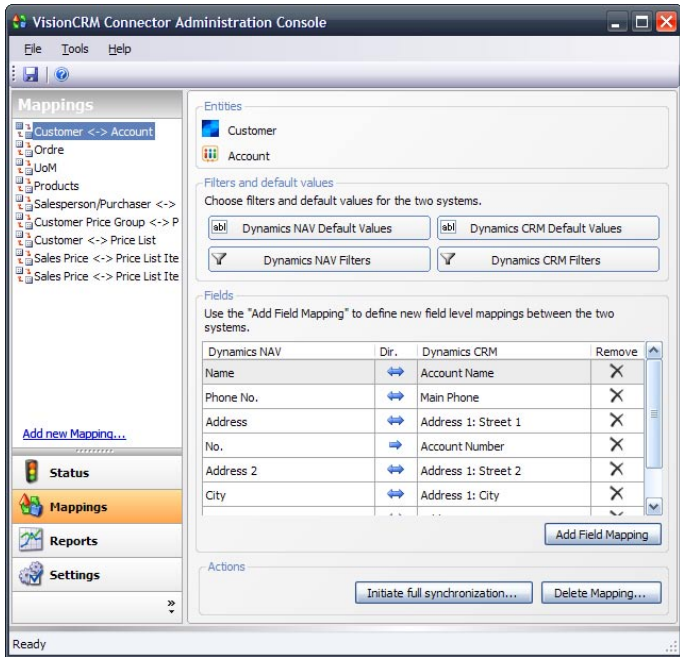


In Microsoft Dynamics NAV, there are 3 types of data which is transferred to Microsoft Dynamics CRM:

- Basic information like customers, items, etc. These are synchronized instantly.
- Quotes and Orders. Microsoft Dynamics NAV keeps track of the records in Microsoft Dynamics CRM, and sends updates when new information is recorded.

- Static data such as posted invoices. These are synchronized regularly, and Microsoft Dynamics NAV monitors the data that was already sent to Microsoft Dynamics CRM.

Microsoft Dynamics CRM users are able to view and change data that was actually entered in Microsoft Dynamics NAV, and vice versa.



Administration User Interface

All entities can be mapped (including custom entities in both Microsoft Dynamics NAV and Microsoft Dynamics CRM).

Mapping consists of four elements:

Entities

Defines the Microsoft Dynamics CRM entity and the Microsoft Dynamics NAV table that is being mapped.

Filters

Filters can be used to only synchronize a subset of a table or entity.

Default values

When a new record is created, the default values are also inserted.

Field mapping

Defines which fields map to which fields.
Field Mapping can be one way or two way.



Synchronization Service

The mapping engine is using VisionConnector.

It handles the mapping routines between the two different data models, by accessing and combining the metadata from Microsoft Dynamics CRM and Microsoft Dynamics NAV.

With the use of intelligent filters, different objects within the same entity can be applied to separate mappings. For example, some accounts from Microsoft Dynamics CRM can be synchronized with Customers in Microsoft Dynamics NAV and others with vendors in Microsoft Dynamics NAV.

When an object arrives from Microsoft Dynamics NAV to Microsoft Dynamics CRM, the ImportManager Core component will perform the actual change right inside Microsoft Dynamics CRM.

In the inverse situation, the data will be passed to Microsoft Dynamics NAV through the VisionConnector.



Microsoft Dynamics NAV Reports - Microsoft Internet Explorer

View 35 HTML

Customer/Item Sales February 9, 2007
 Period: Page 1
 CRONUS International Ltd. ADMINISTRATOR

All amounts are in LCY

Customer No.: 32050505

Item No.	Description	Involved Quantity	Unit of Measure	Amount	Discount Amount	Profit	Profit %
32050505	Antarcticoopy Phone No.						
70011	Glass Door	1	PCS	61.46	10.04	24.55	40.0
1060-G	ROME Quartz Chair, green	7	PCS	975.70	0.00	192.50	22.1
1060-S	MEXICO Swivel Chair, black	4	PCS	463.20	0.00	108.80	22.1
1070-W	BINSBRICK Storage Unit/W.Door	6	PCS	1,152.86	123.05	309.76	24.7
	Antarcticoopy			2,652.80	138.89	726.00	28.1
Total				2,652.80	138.89	726.00	28.1

Reporting in Microsoft Dynamics CRM

Microsoft Dynamics CRM users can use Microsoft Dynamics NAV reports within the Microsoft Dynamics CRM system. The reports are generated from Microsoft Dynamics NAV.

- Access customized sales & customer Microsoft Dynamics NAV reports in Microsoft Dynamics CRM
- See real time customer and sales history in Microsoft Dynamics CRM

VisionCRM Connector Administration Console

File Tools Help

Reports for Accounts

Select the Dynamics NAV reports from the list below. The chosen reports must relate to the data synchronized to this particular Dynamics CRM Entity.

Dynamics NAV Report	View
Customer - List	<input checked="" type="checkbox"/>
Customer - Detail Trial Bal.	<input checked="" type="checkbox"/>
Customer - Summary Aging	<input checked="" type="checkbox"/>
Customer Detailed Aging	<input type="checkbox"/>
Customer - Order Summary	<input type="checkbox"/>
Customer - Order Detail	<input type="checkbox"/>
Customer - Summary Aging Simp.	<input type="checkbox"/>
Customer - Top 10 List	<input type="checkbox"/>
Sales Statistics	<input type="checkbox"/>
Customer/Item Sales	<input type="checkbox"/>
Statement	<input type="checkbox"/>
Customer - Sales List	<input type="checkbox"/>
Customer - Balance to Date	<input type="checkbox"/>
Customer - Trial Balance	<input type="checkbox"/>

Ready

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