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*

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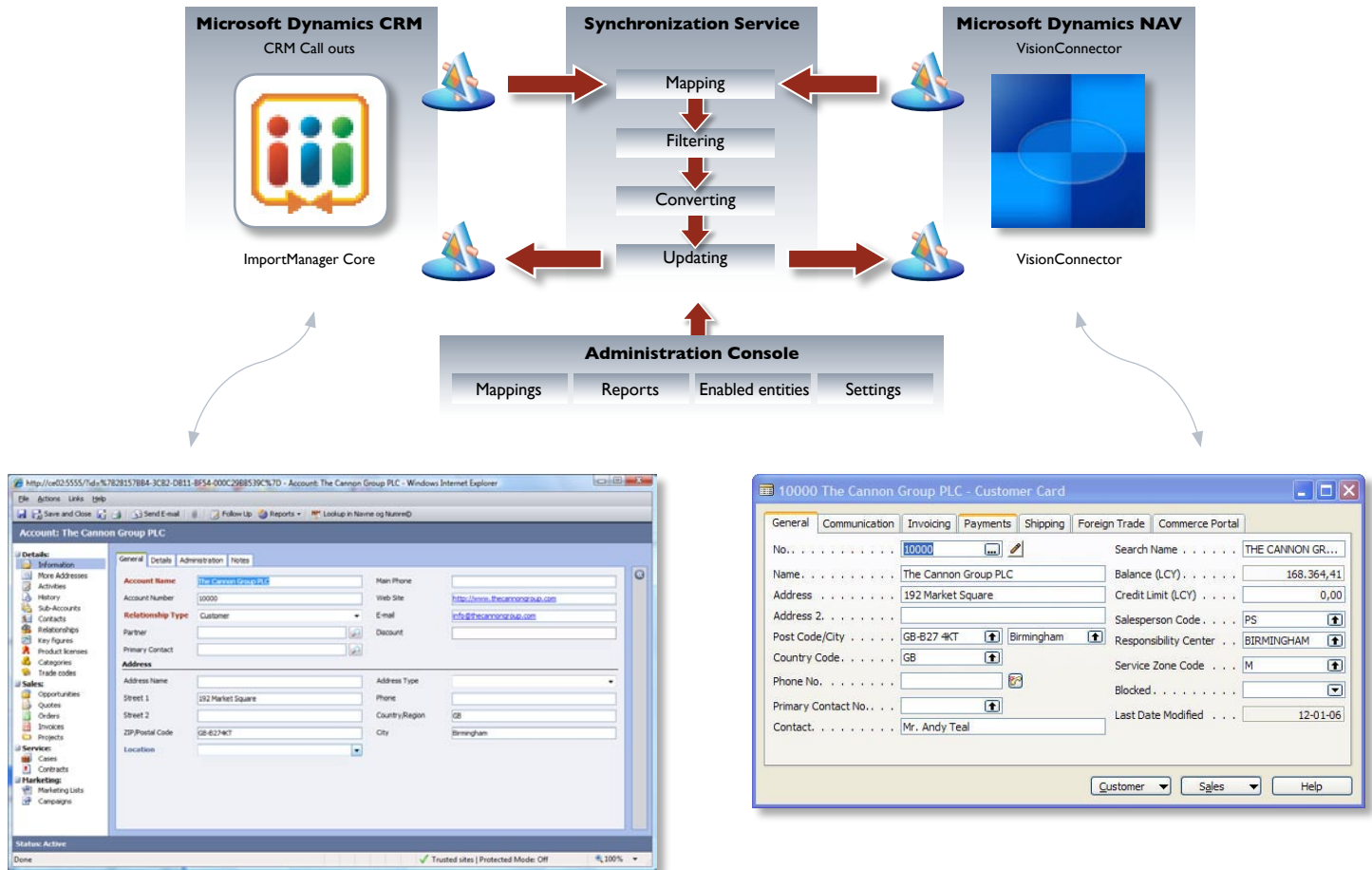
In Microsoft Dynamics NAV, there are 3 types of data which is transferred to Microsoft Dynamics CRM:

- 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.
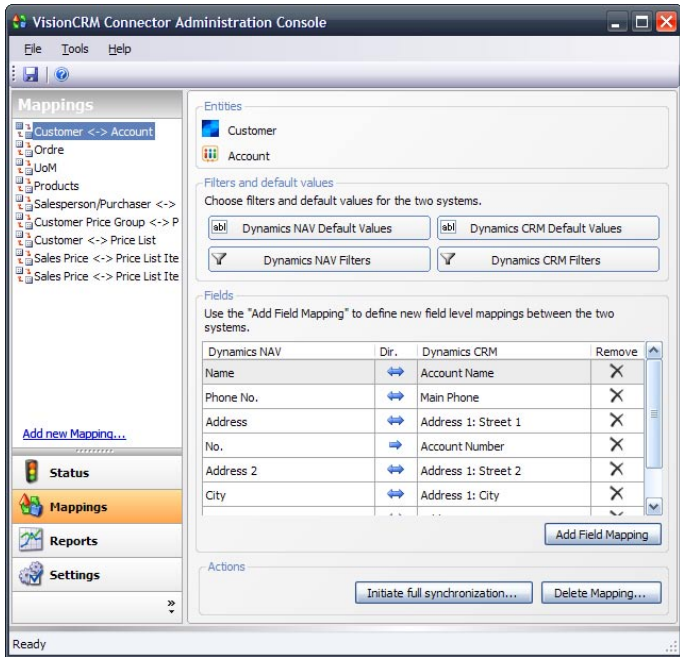
Administration User Interface

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 seperate 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.

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

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VISION *PEOPLE* ®

VisionPeople EMEA:

Blokken 15 · DK-3460 Birkeroed · Denmark

Hestehaven 21 M, 1.sal · DK-5260 Odense S · Denmark

Phone: +45 7023 3200 · Fax: +45 4590 7363

VisionPeople Americas:

601 108th. Ave. NE, Suite 1900 · Bellevue, WA 98004 · USA

390 Notre Dame West s.460 · Montreal, Quebec H2Y 1T9 · Canada

Phone: +1 514 849 1115 · Fax: +1 940 991 9872

VisionPeople APAC:

79 Anson Road #15-04/05 · Singapore 079906 · Singapore

Phone: +65 6238 5143 · Fax: +65 6325 4221