



Dynamics 365 Connector for SYSPRO

Product Sheet

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1-855-7ON-LINE

Dynamics 365 Connector for SYSPRO
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Overview

Dominic Systems identified a need for flexible integration between the SYSPRO ERP System (SYSPRO) and the Microsoft Dynamics 365 System (CRM). It was a need that was not being adequately met by the available solutions.

To meet this need, we first set out a series of Design Parameters to make sure that our solution would fit as many as possible of the integration scenarios that we had seen. One observation we had made during our involvement in a series of customised integration projects for SYSPRO and CRM was that no two were alike!

The Design Parameters we set out were:

- The Solution must allow for integration with both the On-Premise and Online versions of CRM
- The Solution must allow for integration both From CRM to SYSPRO and From SYSPRO to CRM
- The Solution must utilise the full validated and robust interfaces provided by SYSPRO and CRM
 - E.Net for SYSPRO
 - CRM SDK for CRM
- MOST IMPORTANTLY, the Solution MUST allow for customisation by the Customer

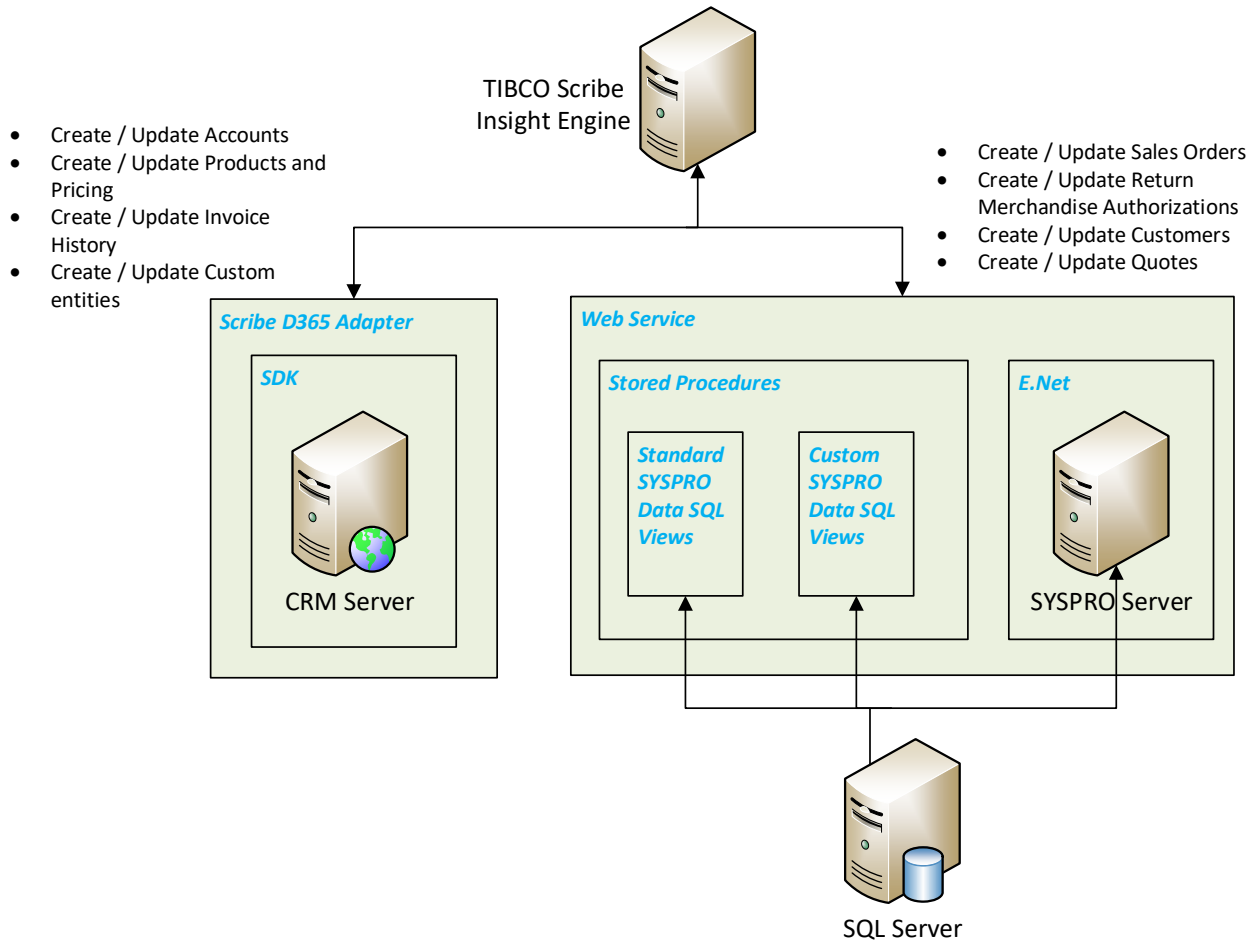
We created an Architecture that meets all these goals.





Architecture

Simplified view of the SYSPRO – CRM Integration Package Architecture





The Dynamics 365 Connector for SYSPRO Architecture consists of seven key components:

- 1 The Scribe Insight Data Integration Engine
- 2 SQL Server Views of the SYSPRO Data
 - a. These allow individual SYSPRO installations to specify custom “columns” of data to be made available for integration to CRM.
 - b. You can add any additional data you need for integration including calculated values and even references to external databases
- 3 SQL Stored Procedures that “roll up” the standard and non-standard data and present it to the Scribe Insight Engine
- 4 Pre-built Scribe Integration Packages (DTS)
 - a. These DTS are editable by you to customise your SYSPRO – CRM Integration
 - b. You can also add completely new DTS to create brand new links between SYSPRO, CRM and/or other systems
- 5 SYSPRO E.Net Business Objects *
- 6 Pre-built CRM Customisations to add SYSPRO Data fields to the standard CRM entities
- 7 Pre-built CRM Custom Entities for SYSPRO Reference tables such as Tax Codes, Geographic Areas, Currencies and so forth

* SYSPRO E.Net is only **required** for writing back transactional data to SYSPRO. E.Net is the preferred method for making **any** updates to SYSPRO, but is not required for “static” data such as Customer Addresses or Product Descriptions.





Sample Screen Shots - CRM Account Form

Microsoft Dynamics CRM | SALES | Accounts | Bikes and Blades - ... | Create | Ray Murrell | CRM4SYSPRO

ACCOUNT: INFORMATION

Bikes and Blades - West

Primary Contact: -- | Credit Limit: \$500,000.00 | Owner: Ray Murrell

General

Account Name	Bikes and Blades - West	Main Phone	555-0165	Street 1	P O Box 8757
Account Number	0000099	Other Phone	555-0099	Street 2	Western Areas
Parent Account	Bikes and Blades - North	Fax	--	City	West
Primary Contact	--	Web Site	--	State/Province	--
Relationship Type	--	E-mail	natalie.e@bikes@blades.com	Country/Region	--
Currency	US Dollar			ZIP/Postal Code	--

SYSPRO Customer

Credit Hold	No	Credit Status	0	Credit Limit	\$500,000.00	AR Invoice Terms	30 Days - Net
Highest Balance	0.00	Avg Days to Pay	0.00	Current Balance	0.00	Date Added	4/9/2010
Order Value	0.00	# of Orders	0	Date Last Pymnt	--	Date Last Sale	--
Current	0.00	# Current	0	SYSPRO Branch	Receivables - North	Tax Status	E
30 Days	0.00	# 30 Days	0	SYSPRO Area	Northern Region	Co. Tax Number	--
60 Days	0.00	# 60 Days	0	Customer Class	Need Monitoring	GST Exempt	E
90 Days	0.00	# 90 Days	0	Salesperson	101	GST Level	1
120 Days	0.00	# 120 Days	0	Store Number	West	Tax Exempt #	--
Credits	0.00	# Credits	0	State Code	--	GST Exempt #	--

SYSPRO Details

SYSPRO Contact	Natalie Elwood	Faxed Docs Contact	--	Street 1	678 Western Bypass Complex	State/Province	--
Doc Fax #	--	Doc Fax #	--	Street 2	West East End Road	Country/Region	--
				City	Western Regions	ZIP/Postal Code	--

SYSPRO History

Sales Val Mth 1	0.00	Sales Val Mth 8	0.00	Sales Val Mth 15	0.00	Sales Val Mth 22	0.00
Sales Val Mth 2	0.00	Sales Val Mth 9	0.00	Sales Val Mth 16	0.00	Sales Val Mth 23	0.00
Sales Val Mth 3	0.00	Sales Val Mth 10	0.00	Sales Val Mth 17	0.00	Sales Val Mth 24	0.00
Sales Val Mth 4	0.00	Sales Val Mth 11	0.00	Sales Val Mth 18	0.00	Sales Val Mth 25	0.00
Sales Val Mth 5	0.00	Sales Val Mth 12	0.00	Sales Val Mth 19	0.00	Sales Val Mth 26	0.00
Sales Val Mth 6	0.00	Sales Val Mth 13	0.00	Sales Val Mth 20	0.00		
Sales Val Mth 7	0.00	Sales Val Mth 14	0.00	Sales Val Mth 21	0.00		

Month To Date

MTD Invoice Val	0.00	# of Invoices	0	MTD Discounts	0.00	# of Discounts	0
MTD Credit Notes	0.00	# of Credits	0	MTD Adjustments	0.00	# of Adjustments	0
MTD Debit Notes	0.00	# of Debits	0	MTD Finance Chges	0.00		
MTD Payments	0.00	# of Payments	0				

SYSPRO Details

SYSPRO Contact	Natalie Elwood	Faxed Docs Contact	--	Street 1	678 Western Bypass Complex	State/Province	--
Doc Fax #	--	Doc Fax #	--	Street 2	West East End Road	Country/Region	--
				City	Western Regions	ZIP/Postal Code	--

Summary

MTD Sales	0.00	YTD Sales	0.00	Prev Year Sales	0.00
MTD Profit	0.00	YTD Profit	0.00	Prev Year Profit	0.00

Details

Territory	--	Category	--	Industry	--	SIC Code	--
				Annual Revenue	--	Ownership	--
				# Employees	--	Ticker Symbol	--





Preferences

Owner **Ray Murrell** Originating Lead --

Managing Partner --

Billing Information

Price List -- Payment Terms --

Contact Methods

Preferred	Any	E-mail	Allow
		Bulk E-mail	Allow
		Phone	Allow
		Fax	Allow
		Mail	Allow

Marketing Information

Send Marketing Materials Send

Last Date Included in Campaign --

Service Preferences

Preferred Time -- Preferred Day --

Preferred Service --

Preferred Facility/Eq: --

Preferred User --

Contacts

My Active Contacts +

Full Name ↑	Email	Company Name	Business Phone
No Contact records found.			

Status **Active**

Active

Sample Screen Shots - CRM Product Form

Microsoft Dynamics CRM | SALES | Products | 15 Speed Mountain... | Create | Ray Murrell CRM4SYSPRO

+ NEW | DEACTIVATE | DELETE | CONVERT TO KIT | EMAIL A LINK | RUN WORKFLOW | START DIALOG

PRODUCT: INFORMATION

15 Speed Mountain Bike Girls

General

ID *	UTPM101	Unit Group *	EA	Product Type	Sales Inventory	Default Price List *	A
Name *	15 Speed Mountain Bike Girls	Default Unit *	EA	Quantity On Hand	988.00	Decimals Supported *	3
Subject	--	Currency	US Dollar	URL	--	List Price	\$105.00

Description

Vendor	--	Vendor Part Number	--	Stock Weight	1.00	Stock Volume	0.00
Standard Cost	--	Current Cost	\$45.25				

SYSPRO Details

Details

Alternate Key 1	--	Supplier Name	--	User Field 1	--	Size	--
Alternate Key 2	--	Version	--	User Field 2	0.00000	Style	--
Tax Code	A	Release	--	User Field 3	--	Loading Factor	--
Other Tax Code	--	Country Of Origin	--	User Field 4	--	Look Ahead Windw	--
GST Tax Code	A	Company ID	0	User Field 5	--	Date Added	6/8/2009

Notes

Status **Active**

Active





Standard Capabilities

The standard SYSPRO – CRM package includes drivers and mappings (DTS) for the following integration points:

- SYSPRO Customer → CRM Account (Create and/or Update)
- CRM Account → SYSPRO Customer (Update only)
- SYSPRO Stock Code → CRM Product (Create and/or Update)
- SYSPRO Invoice (Sales History) → CRM Invoice (Create only)
- SYSPRO Sales Order → CRM Order (Order Status) (Create and Update)
- SYSPRO Dispatch Notes → CRM Dispatch Notes (Custom Create)
- CRM Quote/Order to SYSPRO Sales Order (Create only – requires E.Net)

These integration points also utilise a variety of “Reference Table” integration points for ancillary SYSPRO Tables:

- Unit Groups
- Units (Units of Measure – Stocking, Alternate and Other)
- Price Lists
- Price Codes (Coded Pricing)
- Currencies (integrates with standard CRM Currency entity)
- Tax Tables
- Banks
- A/P Branches
- A/P Terms Codes
- A/R Terms Codes
- Customer Classes
- Sales Branches
- Sales Areas
- Product Classes





Expansion Capabilities

As mentioned in the Overview, one of the key Design Criteria for the Dominic Systems SYSPRO – CRM Integration Package was flexibility. Two main design decisions were made in order to provide maximum flexibility while still providing a robust solution:

- Using the Scribe Insight Integration Engine
 - Scribe allows non-developers to create and modify their own DTS (Mappings) between SYSPRO and CRM safely and securely
- Providing a User Editable “Additional Fields” View within the SYSPRO interface as a window for the inclusion of any extra data or calculated values to be extracted from SYSPRO
 - CRM automatically publishes custom fields to its web service interface (SDK), but SYSPRO required this “window” for you to maintain
 - Any additional fields included in these SQL Views is automatically published for the Scribe Engine to use in its mappings

More Information

For more information on the Dynamics 365 Connector for SYSPRO, please contact us at

Dominic Systems Limited
1-855-7ON-LINE (1-855-766-5463)
CRM4SYSPRO@dominicsystems.com

You can also learn more about the Scribe Insight Data Integration Engine at www.scribesoft.com

