

## Top 5 Benefits of Integrating

### Microsoft Dynamics 365 CRM with ERP

Time and again organizations have embraced the value of data driven business outcomes. From using cloud to store large quantities of data to becoming more efficient at harnessing data and signals coming from different channels like CRM/ ERP /Web Commerce applications. It also allows the leverage to drive an impactful business straightforwardly. Business insights enable enterprises to gather information based on market data and breaking down an otherwise sophisticated and complex data into smaller fragments leading to accurate and actionable business statistics.

Dynamics 365 CRM is one of the fastest growing and most popular CRM systems in recent years. The application is customer-oriented and covers all customer support, sales and marketing activities. Dynamics 365 CRM maintains continuous and consistent quality of service across all departments thus ensuring seamless flow of information. Integrating ERP system with Dynamics 365 CRM can enhance productivity, increase efficiency, decrease costs and streamline processes within the organizations. In the past, most of this information was transactional data and more focused on supporting the inventory needs rather than analysis or decision-making. The time and needs have changed today. These days' decision makers need real-time analysis and actionable intelligence to be able to deal with the changing tides, needs and market demands. With the consumer market depending heavily on timely & accurate decision making, a simple error in data could have monumental effect on the balance sheets. The Dynamics 365 CRM - ERP integration solution provides businesses with the tools that they need to create an efficient business ecosystem. Even more, Dynamics 365 CRM integration allows businesses to strengthen the power of their ERP and CRM solution, creating connectivity to other applications, services, systems, and data types.

In this paper we will discuss the integration capabilities of Dynamics 365 CRM with ERP which combines the critical aspect of various disparate systems in a common database and the function of Greytrix in providing an integration with the best of breed enterprise reporting, data visualizing and management solutions.



## Top 5 Benefits of Integrating Microsoft Dynamics 365 CRM with ERP:

Data integration provides built-in connectivity to the businesses and more, with data across hundreds of business systems, enabling rich and intelligent experiences. The Common Data Model provides semantic consistency for canonical business entities across Dynamics 365 CRM and Common Data Service, increasing value and saving time for application developers, ISV partners, and integrators.

01

**Enhanced customer profile and information:** Customer profiling provides detailed information of the prospect, which in turn helps in analyzing the market trends, coupled with marketing analytics. It provides key insights on the business growth chart that can help sales and marketing professionals better allocate sales and marketing dollars to increase ROI. It also helps in enhancing the end client experience due to faster resolution of queries.

02

**Seamless connectivity between disparate systems:** Dynamics 365 CRM is a cloud based CRM that integrates together with Enterprise Resource planning for seamless connectivity between departments. It provides enhanced agility to act on resources by connecting multiple departments from Marketing and Sales to Operations, Finance and Customer Relations. This enables the data to flow in real time thus, rendering smart 'Time to Decision'.

03

**Shortening the Sales cycle:** Time and again it has been proved that having customer data on fingertips helps in converting leads faster. A well analyzed customer data drives Sales representatives to provide customized and intuitive services. The integrated module of Dynamics 365 CRM is easily available on portable devices like desktops, mobile and tablet thus, providing Sales team with data on hand.

04

**Quick scalability:** Scalability is an attribute that describes the ability of a process to grow and manage increased demand. A cloud based integrated CRM enables customer engagement in an effective manner and adjusts according to your organizational needs, boosting collaborative sales. It also increases mobility and enables smart investment infrastructure. Ample resources implies increased Sales thus amplifying ROI.

05

**Avoid duplication for increased data integrity:** Operating two disparate systems can most necessarily risk data duplication. Identical records can be created for the same customer thus, compromising your data integrity, as duplicate updates are not always intuitive. By integrating Dynamics 365 CRM with your ERP, users can promote and link customer profiles on both the platforms ensuring seamless flow of information across the organization. The enhanced agility thus, helps in to act on new information quickly and maximize ROI.

What makes Dynamics 365 CRM integration with Sage ERP a preferred option is that it is easy to use and permits stakeholders with a complete overview of the organization. It adjusts itself according to the growing demands of the business and moreover, it is affordable.

## The integrated capabilities of Microsoft Dynamics 365 CRM – sageERP:

The Dynamics 365 CRM - Sage ERP integration brings all facets of your business together to streamline processes and drive effective communication between departments. Information in the Dynamics 365 CRM integrates automatically into Sage ERP. Any changes that are made such as new orders or invoices is automatically pushed between the system providing sales team the ability to see orders, invoices, payments. Some of the benefits which you can achieve by integrating Dynamics 365 CRM with Sage ERP are:

### Simplified Customer onboarding:

Heaps of duplicate data entries make Customer onboarding a daunting task for enterprises. An integrated Dynamics 365 CRM with Sage ERP streamlines the onboarding process eliminating errors for entities like credit checks, references, contact data etc. It provides administrative access to the stakeholders to view the data subjective to their area of functionality.

### Quick Quote generation:

One of the most important aspect of the Sales cycle is Quote generation. While presenting a quick and accurate quote can win you a deal on the other hand an error or a delayed quote can lose you a customer. An integrated Dynamics 365 CRM - Sage ERP can provide your Sales team with access to prices, availability, shipping details and more which empowers them to quote and close deals faster.

### Real time updates:

With Dynamics 365 CRM and Sage ERP integration enterprises can achieve a single Customer centric environment in real time. Orders, invoices, purchases get updated in real time (almost) in both the systems thus eliminating manual work.

### Increase in business opportunity:

Enrich your boundaries and double your profits with Dynamics 365 CRM and Sage ERP integration. The unique integration offers out of the box functionalities in a convenient and easy to use package for an increased business visibility across departments.

## How does the integration work? The “Triple- A Loop”: Analyze, Act, Automate:

- ▶ **Mapping:** Greytrix GUMU™ connector for Dynamics 365 CRM – Sage ERP integration has a rich set of predefined mappings between the systems. These include the basic settings as well as the main entities like items/products, contacts, customers/company, Quotes, Orders, Invoices (Sales) and Salesperson – User mapping. There are also thorough instructions for the sequence of integration between them.
- ▶ **Time of synchronization:** Each mapping is (scheduled &) checked periodically for new data and synced between the two systems. This helps in maintaining the frequency of Orders created within CRM and their processing within the ERP. Mapping times are specific to each industry and must be set individually according to your business processes.
- ▶ **Filters:** The Dynamics 365 CRM - Sage ERP integration allows for the definition of individual filters to limit the data type that is synchronized between the two systems. For example, items that are used in production but not offered for sale, can only remain in the ERP system without being sent to CRM. The same is true in the opposite direction too.

By integrating Dynamics 365 for Customer Engagement (CRM) with your Sage ERP, enterprises can increase efficiency and visibility, leading to increased sales and consistent growth.

## Greytrix - Your simplified Partner for complex integrations:

Greytrix focused approach, automation, out-of-the-box capabilities broadens the features and functionalities of Dynamics 365 CRM – Sage ERP offering integration opportunity with the best of breed financial reporting, data visualizing and management solutions. Businesses can view detailed information in the form of graphs, tables, with links making it possible to follow the entire security audit trail up to the information details. It empowers all users with a solution to access and analyze data in a self-sufficient manner, thus eliminating the need for disparate tools and specialized skills.

**GUMU™ for  Microsoft Dynamics 365 CRM – **sage**ERP integration offers:****Bi-directional integration:**

Synchronize Accounts, Sales Quotes, Sales Orders and Sales Invoices from Sage to Dynamics 365 CRM (Standard tables/ Objects) that can be viewed on user-friendly UI of Dynamics 365 CRM layout. The updates can also be synced back to Sage ERP system.

**Multi-company integration:**

Multi-company integration provides robust growth enabling better communication and improved productivity. Users can configure multiple Sage ERP companies with single instance of Dynamics 365 CRM environment leading to capital and market control.

**Access from portable devices:**

Critical information regarding leads, accounts, and orders can be accessed across devices like desktops, mobiles, and tablets ensuring that sales and service teams respond quickly to customer needs. It provides similar view on all the devices.

**Updated customer sales information:**

Important Sales and service information can be viewed on user-friendly Dynamics 365 CRM Lists for particular accounts. This in turn provides decision makers with superior visibility into key business metrics and enables sales and service teams to proactively cross-sell and up-sell more effectively.

Dynamics 365 CRM is a Microsoft-hosted solution that delivers the simplicity and flexibility of cloud computing with powerful customer relationship management (CRM) capabilities. With the integration of Microsoft Dynamics 365 CRM and Sage ERP, businesses gain instant online access to CRM capabilities anywhere over the web. Greytrix focused approach, automation, out-of-the-box capabilities broadens the features and functionalities of Dynamics 365 CRM – Sage ERP integration offering best of breed financial reporting, data visualizing and management.

To summarize, companies opt for Microsoft Dynamics 365 CRM and Sage ERP integration, for the flexibility that it provides them in conducting business, being able to integrate seamlessly, reduce the learning curve, and allow for smart decision-making and a better ROI.

**About Us:**

**Greytrix** Sage Premier Gold Development Partner is a one stop solution provider for all your Sage ERP and Sage CRM needs. We provide complete end-to-end assistance for your pre-sales technical consultations, product customizations, data migration, system integrations, third party add-on development and implementation expertise worldwide since 1998. Greytrix team of highly experienced and certified Techno-functional consultants ensure that customer requirements are always delivered with quick turnaround time, high quality and at low costs. Our unique GUMU™ integrations include **Sage X3 with Sage CRM**, **Sage X3 with Salesforce.com** and **Sage X3 with Magento eCommerce**.

For more information on Dynamics 365 CRM – Sage 100 Integration and Services, please contact us at [sage@greytrix.com](mailto:sage@greytrix.com). We will be glad to assist you.