



Going Beyond With CRM

Microsoft Partner

Silver Enterprise Resource Planning
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Agenda

- What's CRM and how can it solve business problems?
- What's new in CRM 2016 Spring Wave?
- What is integration?
- Why would I want to integrate GP with other products?
- What are the business drivers for integration?
- What integrations are available
 - Out of the box / Templated
 - Scripted (Scribe etc)
 - Custom integration
- Real world examples
- Questions?

Dynamics CRM – What is it?

- Typically used to manage sales
- Dynamics CRM also includes marketing and service modules
- To oversimplify, can be thought of as a glorified feature rich database (ie: MS Access)

Dynamics CRM – What can you do with it?

- Accessible via Internet Browser/Outlook
- Integration of relevant data (as discussed previously)
- Reporting to track/trend
- Advanced data management – via relationships, workflows, user defined restrictions
- Easily accessible views of information (Entity views, associated info via subgrids)
- Dashboards
- Advanced Find
- Charts
- Mobile capability, browser, tablet app, phone app

Extending Dynamics CRM

- CRM is very powerful in the ways it can be extended
- Build custom entities which can take advantage of...
- Retaining all the benefits/features of reporting, data management, dashboards, etc
- Majority of mentioned functionality can be implemented by users and analysts, no coding required
- Developers with the ability to custom even more advanced functionality beyond that

Example: Marshal

- CRM module to manage health and safety
- Most obvious win – for some companies, converting paper forms/binders/Duo-Tangs with an electronic system
- Ability to manage that data with duplicate detection, formatting restrictions, associate relationships

Example: Marshal Use Case: Safety Meeting

- Supervisor on his tablet creates a safety meeting
- Filter the list of potential attendees by department/jobsite
- Checks off those physically present
- Personnel access the records on their phone and adds signature

Example: Marshal Use Case: Safety Incidents

- Incidents easily entered electronically via the many available access methods
- Relationships between personnel/equipment exist
 - Allows for statistical reporting
 - Views to easily cross reference data (ie: how many incidents equipment/personnel involved in)
- Workflows to generate email notifications/create follow-up tasks

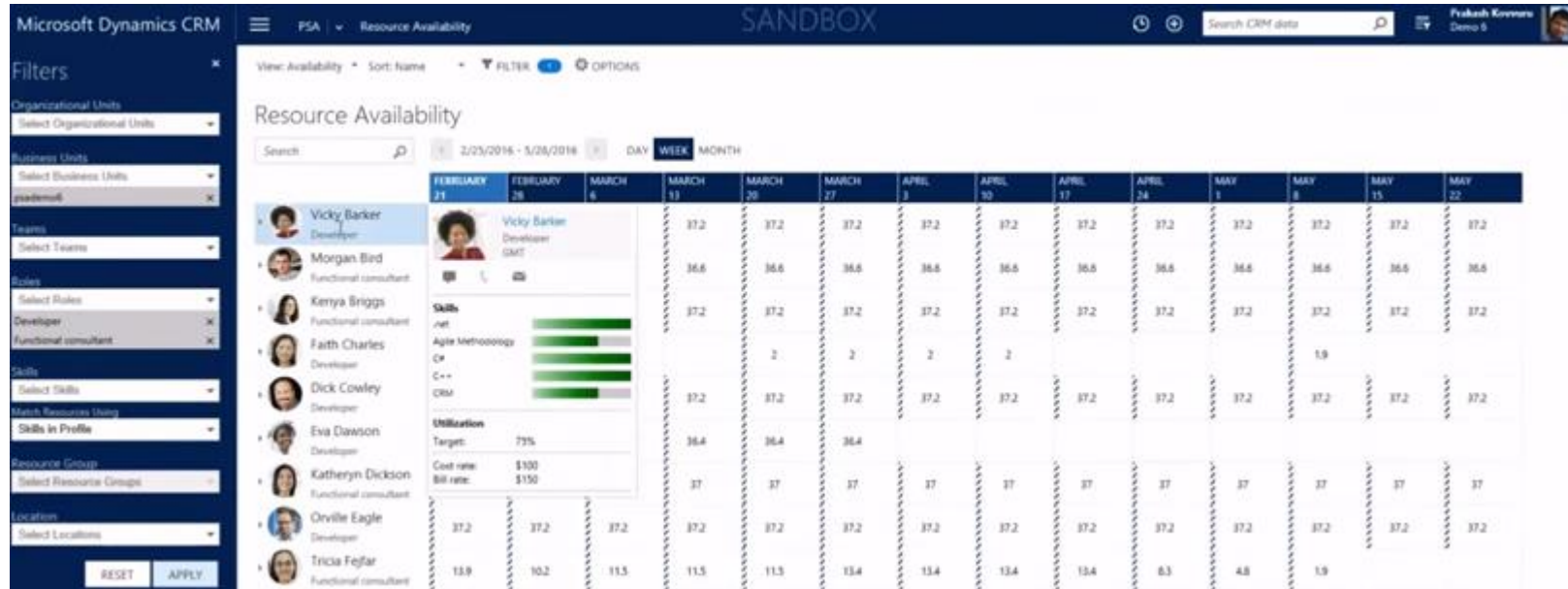
CRM Takeaways

- Glorified database – ability to create record types and relationships to manage whatever data as limited by your innovation
- Large set of built in features to facilitate ease of use, reporting, data management, etc
- Existing interface available for users/analysts to manage/extend the system
- Develop extension available for more powerful functionality

What's new in CRM 2016 Spring Wave

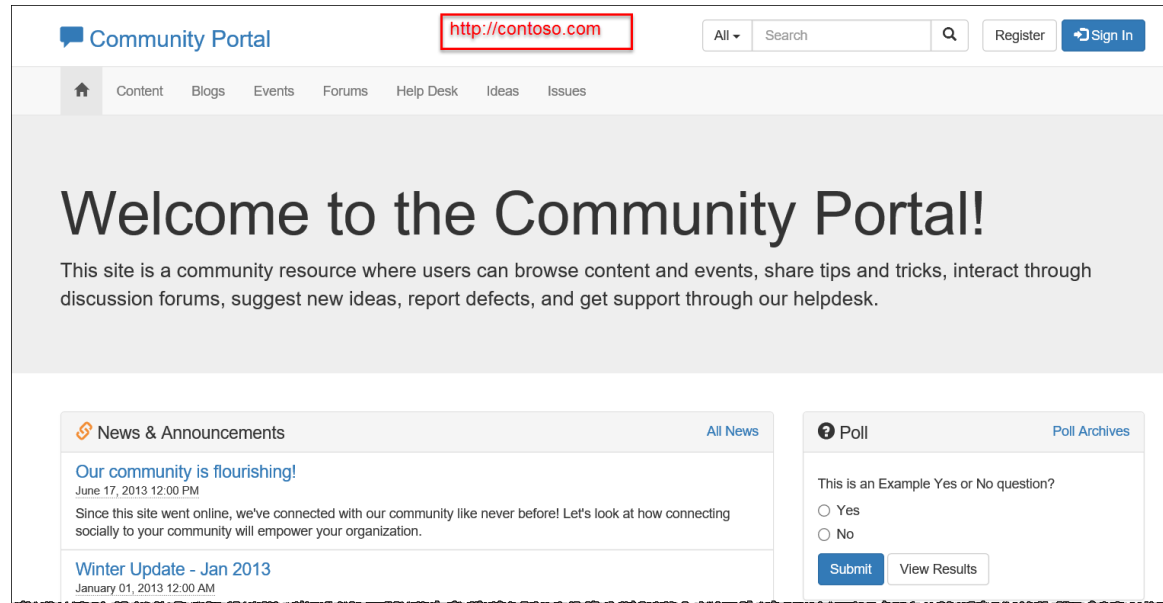
- “Spring Wave” is the latest release of Dynamics CRM and introduces enhancements for Field Service (FieldOne) and Web Portal Integration (ADXStudio)
- Follows the 2015 acquisitions of FieldOne and Adxstudio by Microsoft
- Extends the functionality of core Sales Force Automation and marketing functions for better customer engagement and interaction.
- Also includes enhancements to Social Engagement and Dynamics Marketing

CRM 2016 Spring Wave - FieldOne



- With Field Service, companies now have the ability to schedule, manage and deliver onsite service – be it single-day calls or multi-day, more complex service projects.
- Features include Scheduling and dispatch, Automated Routing, Service Agreements, and Customer communication and extends the functionality to mobile devices.
- Facilitates building an internal service Knowledge Base for better customer support

CRM 2016 Spring Wave - AdxStudio



- Adxstudio provides integration between your web portal and Dynamics CRM for a seamless customer experience
- Customize your website / portal with data integrated from Dynamics CRM
- Mature product with templates and samples, extends CRM to your customers, suppliers and employees

What is Integration?

- Integration is the dynamic, real-time passing of information between your Dynamics ERP/CRM solutions and another operations system
- Examples include:
 - Dynamics GP to Dynamics CRM
 - Dynamics GP to MS Project
 - Dynamics GP/CRM to custom billing systems
 - Dynamics GP/CRM to custom reporting / sales systems
 - Dynamics GP/CRM to custom web interfaces (customer-facing)
- Integration can be used to:
 - Automate manual processes
 - Share information between systems
 - Control access to information
 - Provide more intuitive access to financial information

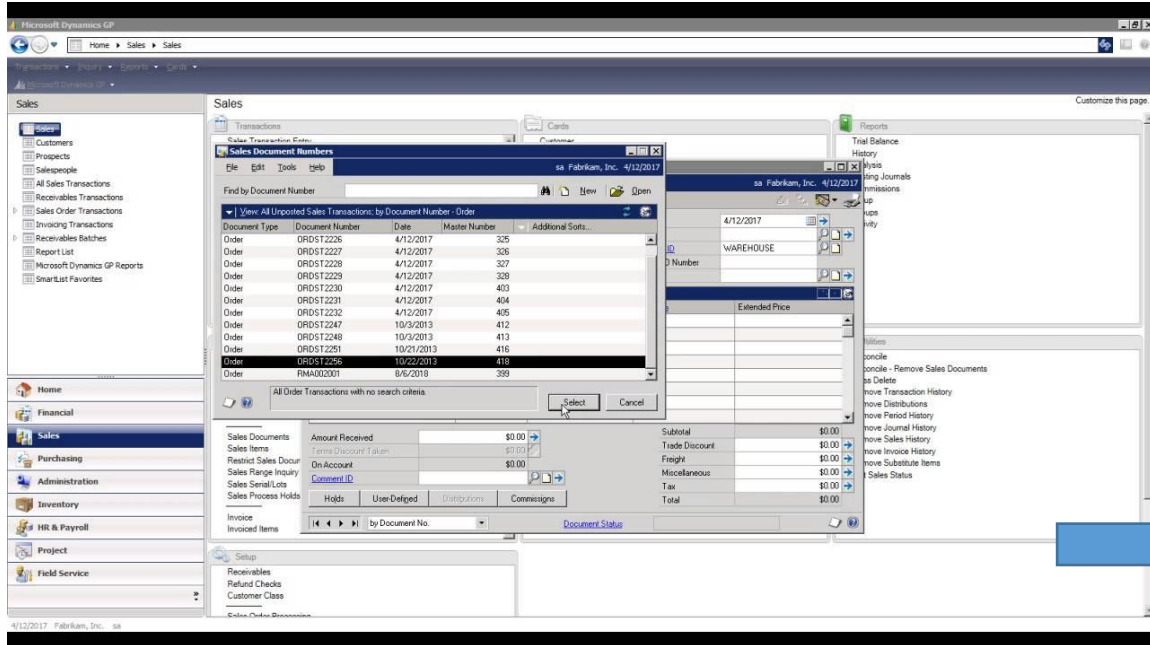
Why would I want to integrate GP to other products?

- Integration can be used to automate manual processes
 - Web cart automatically creating invoices in GP
 - External systems automatically creating sales, purchasing, payroll batches in GP
 - Integrate from spreadsheets or XML files directly into GP batches to eliminate double-entry
- Integration can share information between systems
 - Data can be moved out of GP into a data warehouse / reporting system
 - External systems can drive GP data (inventory, price lists, customer and vendor lists)
 - Summary information can be shared to a CRM system for salespeople, saving GP licenses and simplifying security

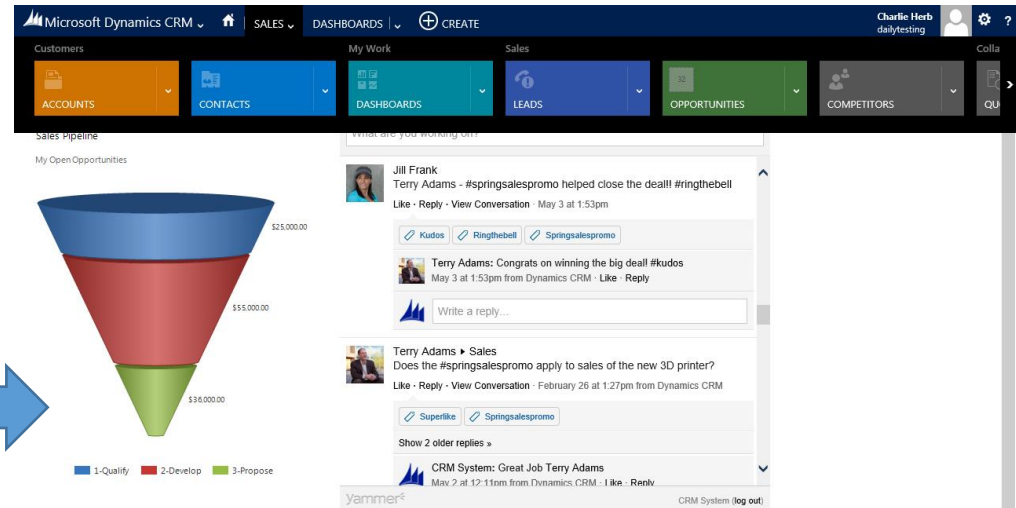
Why would I want to integrate GP to other products?

- Integration can control access to information
 - Web interfaces or CRM can only integrate information necessary for a role, protecting access to sensitive data and processes
 - Security through Obscurity – external departments and third parties don't know what data is there beyond what is presented
 - Separating data from processes eliminates the possibility of somebody inadvertently altering or affecting data
- Intuitive access to financial information
 - Tools such as SQL Server Reporting Services can be used to consolidate data from multiple systems into practical and efficient operational reports
 - Built-in ad-hoc reporting tools in CRM can be used to generate information from the financial system without needing to understand the underlying financial structure
 - Vendors, customers and employees can self-serve necessary information

Why would I want to integrate GP to other products?



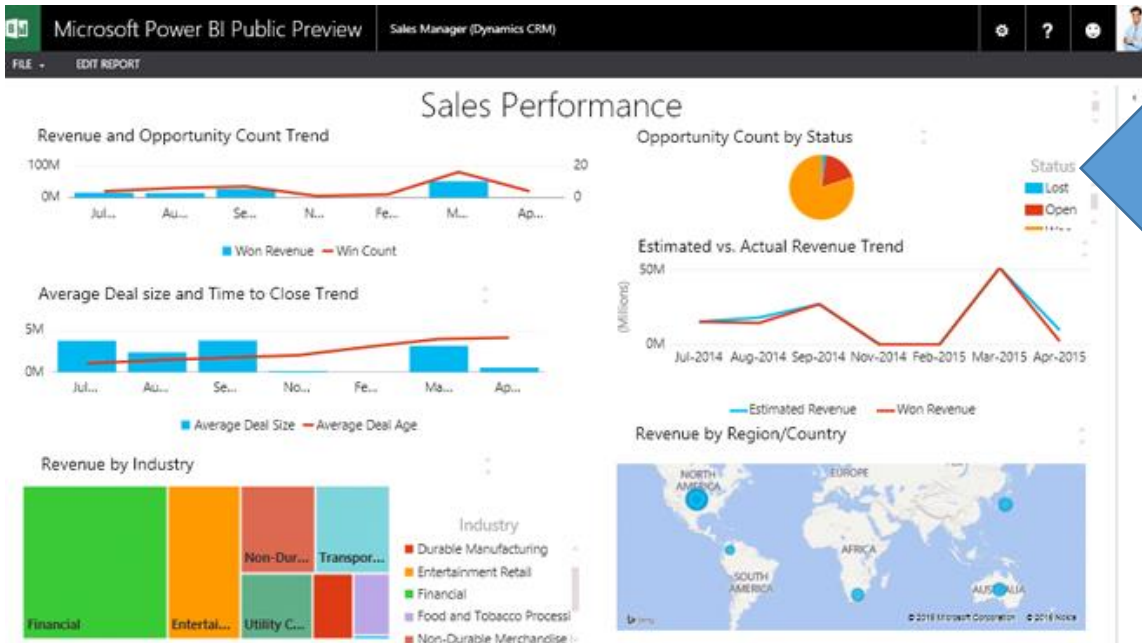
Microsoft Dynamics CRM



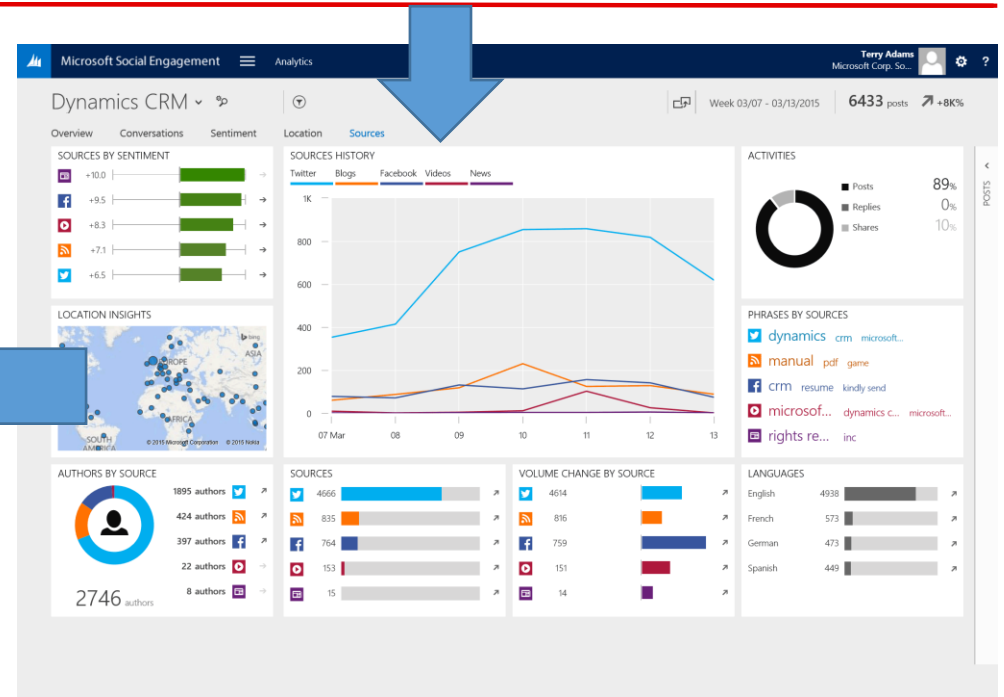
Microsoft Dynamics GP



Why would I want to integrate GP to other products?



Microsoft Power BI



Microsoft Social Engagement

What are the business drivers for integration?



- Better access to relevant operational information
 - Create rich reports with graphs, charts, traffic lights, and other visual cues
 - Streamline process for accessing information – especially for non-technical users
- Real-time reporting, analysis and statistics
 - Consolidate customer and sales information in one place
 - Drill-down to access details
 - Full customer history provides better opportunities for support and marketing
- Savings on license costs
 - License the functionality you need – CRM license vs. GP license
 - Publish via web reports – SQL processor licensing vs. user licensing

What are the business drivers for integration?

- Security of data
 - Only expose the data needed for the task
 - Industry, government and other legal requirements for protection / obfuscation of personal data
- Work closer with customers, suppliers and employees
 - Provide customers with real-time access to inventory and billing information
 - Provide suppliers with real-time access to purchase orders, invoices and payments
 - Provide employees self-serve access to payroll and HR information
- Improvements in efficiency and ability to access information as needed translates directly to bottom-line savings, and allows internal and external partners to work better together

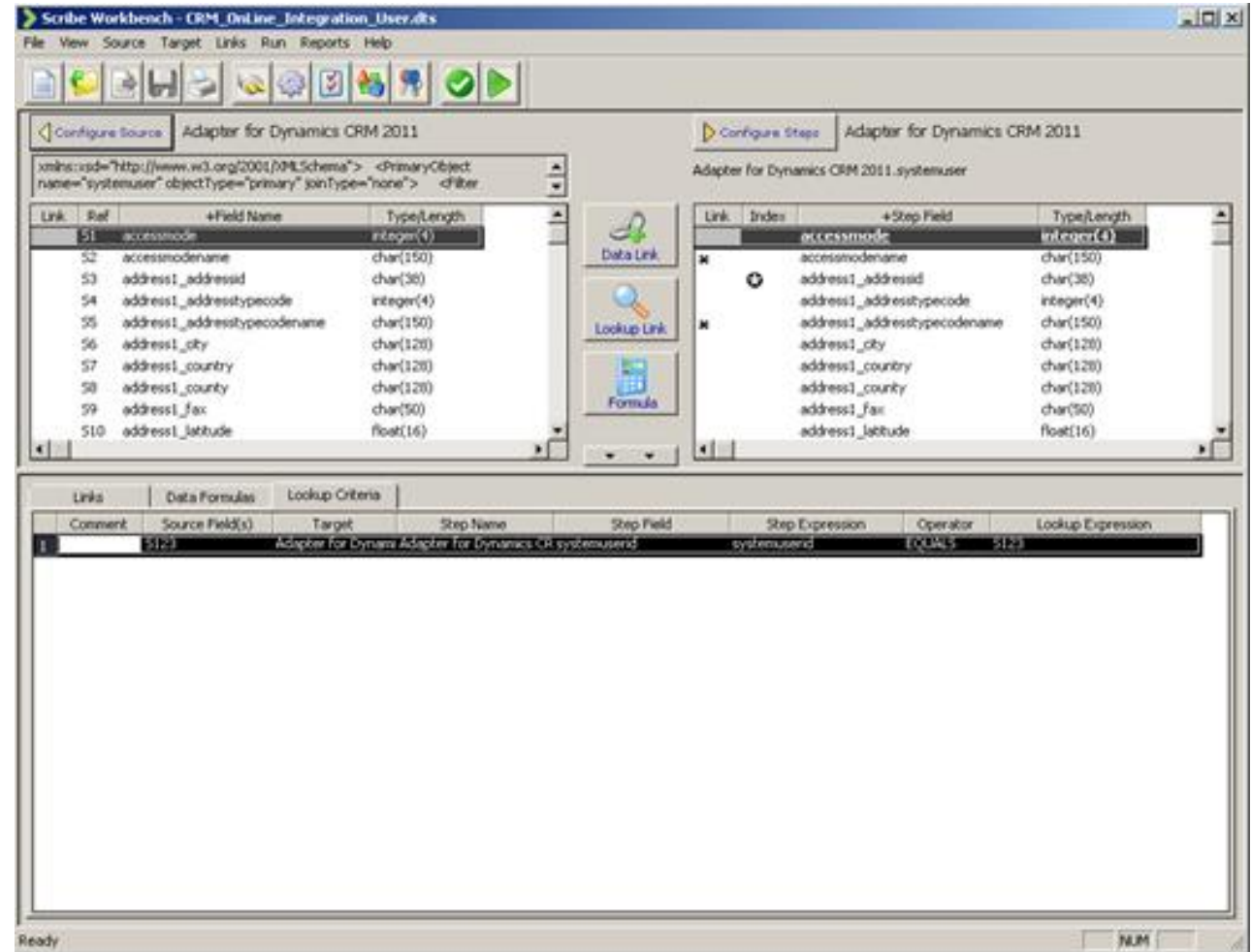
What integrations are available?

- Out of the Box - \$
 - Dynamics GP connector – GP to CRM
 - GP SSRS reports
 - Integration Manager – Excel or flat file to/from GP
 - Smartlist Builder

 Microsoft Dynamics ERP	Integration Direction	 Microsoft Dynamics CRM
Customer	↔	Account
Customer	↔	Contact
Flat fee	→	Product
Kit	→	Product
Miscellaneous Charges	→	Product
Sales Item	→	Product
Service	→	Product
Price Level	→	Price List
Sales Invoice	→	Invoice
Sales Order	↔	Order
Salesperson	→	ERP System User
UofM Schedule	→	Unit Group

What integrations are available?

- Scripted Integration - \$\$
 - Scribe Insight (on-premise)
 - Scribe Online (online / hosted)



What integrations are available?

- Custom integration - \$\$\$
 - Other systems
 - Typically built with Visual Studio tools, for purely custom applications

Real-World Examples

- Dynamics GP to CRM
 - Learning and student management
 - Customer/vendor integration
 - Price list / inventory
 - Invoice / payment / refund integration
 - Operational dashboards
 - HR and Employee integration
 - Recruiting and onboarding
 - Employee/contractor self-serve
 - Safety program management (Marshal)
- Dynamics GP to MS Project
 - MS Project design to project accounting systems
 - Wennsoft integration
 - Project Accounting integration
 - FieldOne integration

Real-World Examples

- Dynamics GP to Payroll/HR
 - Penny for timesheets and employee self-serve
 - External HRIS systems
 - Time-capture / punchcard systems to Canadian Payroll
- Dynamics GP to Purchasing
 - Remote office ordering / fulfillment
 - Real-time conversion of web orders to purchasing system

Summary

- Integrating Dynamics GP and CRM and external systems allows you to
 - Streamline and simplify processes
 - Automate common repetitive tasks
 - Eliminate entry of data multiple times to different systems
 - Provide financial data in your sales systems and vice versa
 - Limit access to data to those that require it, and the data they need to do their job
 - See your business in real time, providing better and more strategic decision making
 - Save time and dollars while increasing accuracy and access to information
 - Interact more effectively with your customers, vendors and staff
 - Eliminate operational overhead due to repetitive tasks, keying errors, and poor information

Questions?

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