



# CRM Integrator

## PARTNER FACTSHEET

### CUSTOMER RELATIONSHIP MANAGEMENT

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As one of the largest SYSPRO resellers in the world, and one of the leading Dynamics 365 partners, K3 has developed a scaleable and functional integration between Dynamics 365 for CRM and SYSPRO ERP, harnessing the power of both systems.

The integration provides an out of the box integrated solution for both SME and enterprise businesses.

### The Benefits of CRM Integrator

- Enhance your sales teams performance by providing them with the information they need, when they need it
- Make your marketing excel
- Demonstrate your commitment to the highest levels of customer service
- Be a modern, mobile, agile business



### CRM Integrator Features

- See the complete customer picture, using Dynamics 365 for CRM's powerful analysis tools, including dashboards that can compare opportunities and orders against targets.
- Drill-through to SYSPRO. Enquiry or maintenance screens can be launched directly from CRM when you have a local SYSPRO client.
- See SYSPRO stock codes, with real-time stock availability, quotes, orders, invoices and RMA's related to each customer, available over the web from anywhere.
- Choose from two quotation methods. SYSPRO quotes for complex pricing and product configuration, or CRM quotes when quotations are created away from the office. When the quote is won, convert to a SYSPRO order with the press of a button.
- Improve your service levels with the customer help, service and support desk functions. On-line management of customer returns via CRM service cases streamlines the support desk operation.
- Create SYSPRO RMAs directly from CRM and analyse returns in CRM to the level of individual products returned, and analyse customer returns history.
- Track serialised product sales against customers for integrated quality control and warranty management.

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