Dynamics 365®
Connector for SYSPRO™

DOMINIC
SYSTEMS LIMITED

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Learn how Dynamics 365® Connector for SYSPRO™ is designed to synchronize information and streamline your business processes.

Dynamics 365® Connector for SYSPRO™

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We designed Dynamics 365® Connector for SYSPRO™ to connect your CRM to your ERP.

We saw our clients struggling to get Dynamics 365® and SYSPRO™ to talk to each other and set out to develop a flexible integration between these two systems to solve this unmet need. We knew that our solution would need to fit as many integration scenarios as possible. Our custom integration projects for SYSPRO™ and CRM showed us that no two use cases were alike! To develop our solution, we outlined a series of Design Parameters with flexibility in mind.

Design Parameters

✓ Must pass data between between CRM and SYSPRO™ in both directions:
- From CRM to SYSPRO™
- From SYSPRO™ to CRM

✓ Must utilize the full validated and robust interfaces provided by SYSPRO and CRM:
- E.Net for SYSPRO™
- CRM SDK for CRM

✓ MOST IMPORTANTLY: Must allow for customization.

Next, we created an Architecture to meet all these goals.

Architecture

Simplified View of the SYSPRO™ – CRM Integration Package Architecture
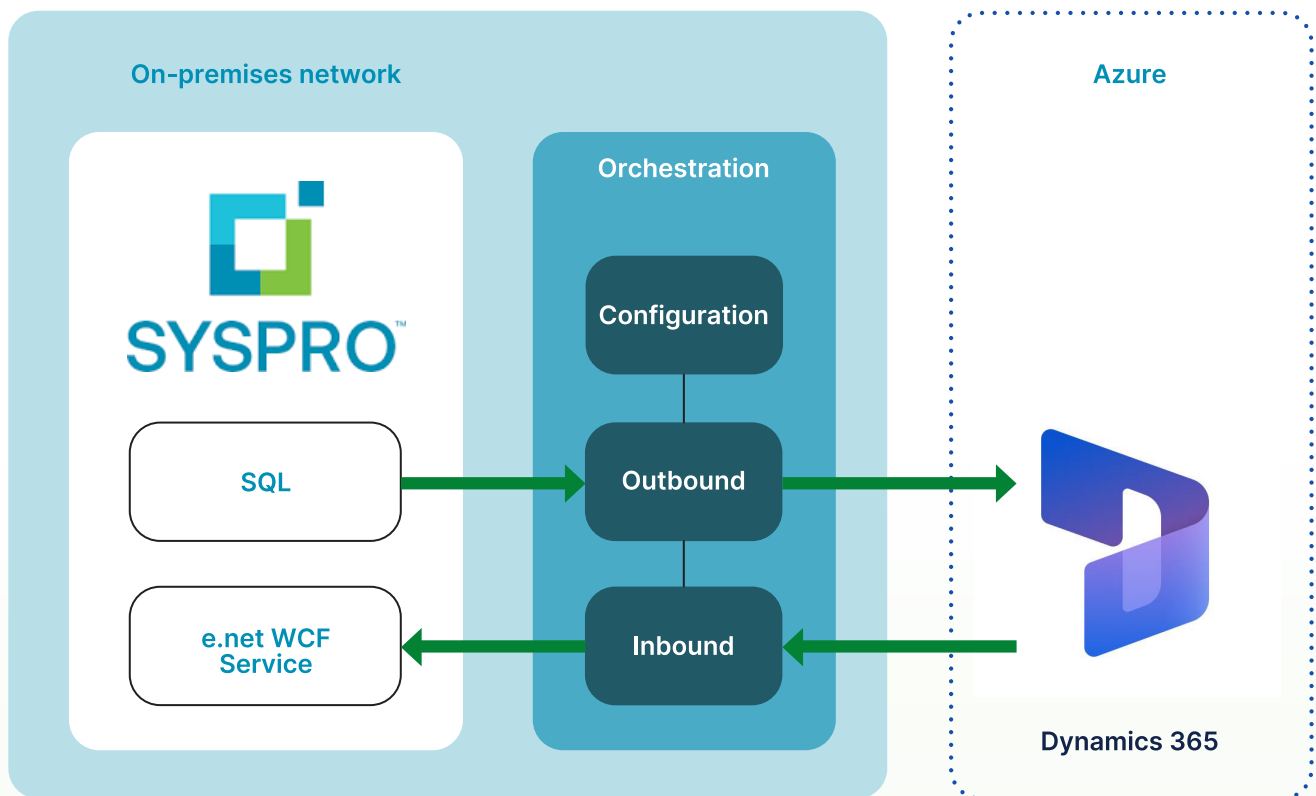
Key Components of Dynamics 365® Connector for SYSPRO™ Architecture

1. **SQL Server Views of the SYSPRO™ Data**
   - These allow individual SYSPRO™ installations to specify custom "columns" of data to be made available for integration to CRM.
   - You can add any additional data you need for integration including calculated values and even references to external databases.

2. **SQL Stored Procedures**
   - These procedures "roll up" the standard and non-standard data and present it to the integration engine.

3. **SYSPRO™ E.Net Business Objects**
   - SYSPRO™ E.Net is required for writing back transactional data to SYSPRO™. E.Net is the preferred method for making any updates to SYSPRO™.

4. **Pre-Built CRM Customizations**
   - To add SYSPRO™ Data fields to the standard CRM entities.

5. **Pre-Built CRM Custom Tables**
   - Built for SYSPRO™ Reference tables such as Tax Codes, Geographic Areas, Terms Codes and so forth.

Sample CRM Account Form With SYSPRO™

Microsoft Dynamics CRM

ACCOUNT : INFORMATION

COMPANY NAME

General

SYSPRO Customer

Information

SYSPRO Details

Details   Shipping Address

SYSPRO History

History

SYSPRO Details

Details   Shipping Address

Sample CRM Product Form With SYSPRO™

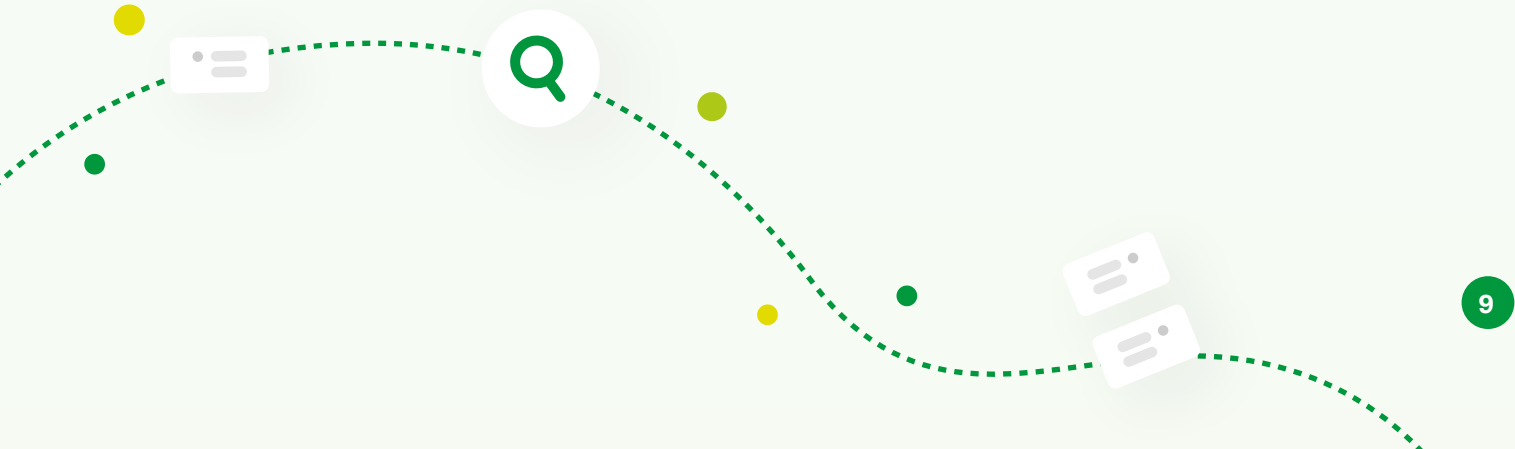**Microsoft Dynamics CRM**

PRODUCT : INFORMATION
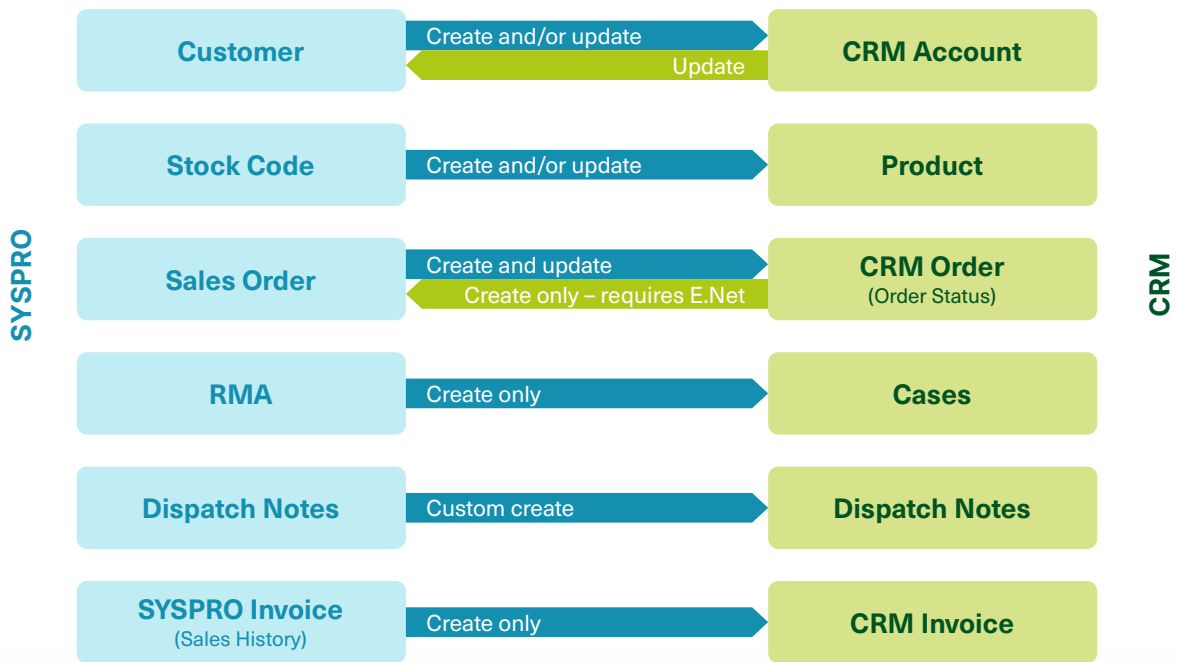
COMPANY NAME

General

SYSPRO Details

Details

Notes

Status   **Active**

Dynamic 365® Connector for SYSPRO™ Integration Points

SYSPRO

SYSPRO		CRM
Customer	Create and/or update → / ← Update	CRM Account
Stock Code	Create and/or update →	Product
Sales Order	Create and update → / ← Create only – requires E.Net	CRM Order (Order Status)
RMA	Create only →	Cases
Dispatch Notes	Custom create →	Dispatch Notes
SYSPRO Invoice (Sales History)	Create only →	CRM Invoice

CRM

These integration points also utilize a variety of "Reference Table" integration points for ancillary SYSPRO™ Tables:

Unit Groups	Units	Price Lists	Price Codes

Tax Tables	Banks	A/P Branches	A/P Terms Codes	A/R Terms Codes

Customer Classes	Sales Branches	Sales Areas	Product Classes
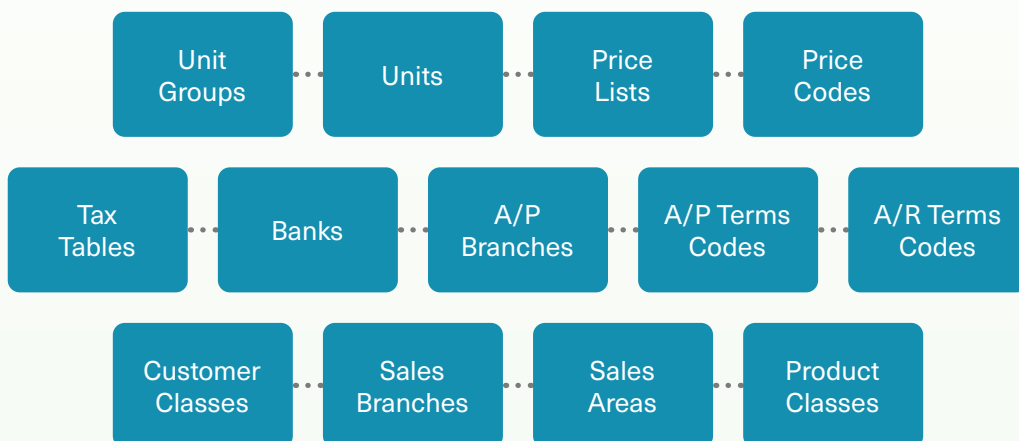
Expansion Capabilities

Our Dynamics 365® Connector for SYSPRO™ was designed with flexibility in mind. To provide maximum flexibility and performance while still providing a robust solution, two main design decisions were made:

1. **Creation of a Hash Value process**
   - It allows high-efficiency and hi-reliability processing of changes to eliminate unnecessary integration traffic and provide extremely robust change management.

2. **Providing an "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 your custom fields as part of integration.

About Dominic Systems

Dominic Systems Limited (Dominic) is a full-service consulting company focused on Dynamics 365®. We're a trusted advisor for medium-to-enterprise-sized customers looking to leverage the power of the cloud to quickly and effectively improve business processes. Since 2010, Dominic has grown alongside the continued enhancement of Dynamics 365® with key focus areas in Customer Engagement (CE) and Customer Relationship Management (CRM) applications so that we can provide the very best services in these areas.

Give Your Sales, Customer Service and Marketing Teams a Data Advantage

For more information on the Dynamics 365® Connector for SYSPRO™, please contact Dominic Systems at:

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