



SOLUTION GUIDE:

How to set up the ultimate Dynamics 365 dashboard for a manufacturing company

Learn three methods for integrating your CRM and ERP so you can synchronize customer and order information, streamline sales and get the insights you need for customer success.

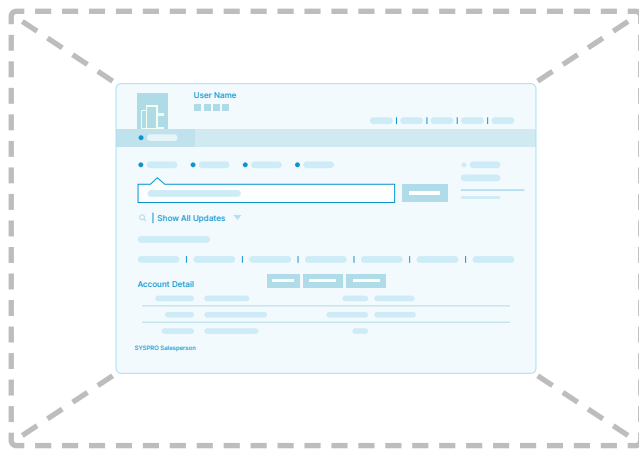
Do you have the key to your ERP?

Your business might be feeling the manufacturing squeeze right now, with supply chain challenges, volume demands and the pressure to deliver products faster. To keep up with accurate price forecasting, complex bills of materials, delivery dates and end-to-end supply chain visibility, your sales team needs critical customer order and product data from your ERP. But, how do they access this data?

Valuable ERP information is often siloed out of sight from sales and customer teams who need access to pricing, delivery timing, previous customer orders and payments, and more. While you could give your sales team a separate login and use up one of your ERP seats, this is an additional expense and an entirely new system to learn.

Build a better dashboard for a bigger picture

A better solution is to integrate your ERP with Dynamics 365 so that this critical information is available at-a-glance in a central dashboard.



Let's take a look at the key parts of an integrated Dynamics 365/ERP dashboard.

SETS YOUR SIGHTS ON

Dashboard views

ERPs contain rich data and part of the challenge is zeroing in on what to pull in and where. To get the most out of your ERP, we recommend enhancing two key Dynamics 365 dashboards:

1 Customer dashboard

This is where you'll pull in critical customer information that's usually only accessible in your ERP, like previous sales information and customer balances.

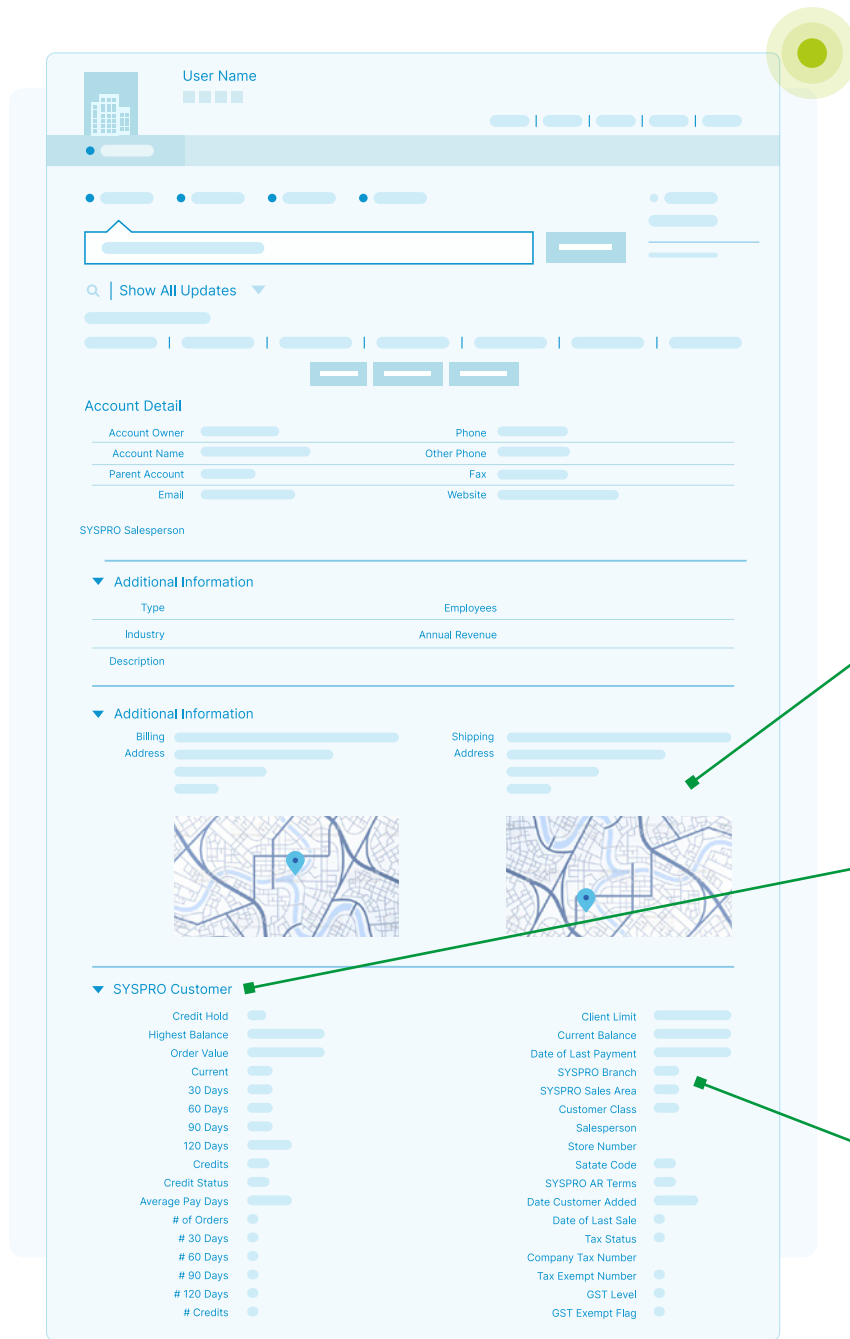


2 Product dashboard

Finally, a way keep track of products to help with accurate inventory and delivery date estimates.



Now we'll show you what to include in each dashboard—and what they could look like.



THE FULL 360

Customer dashboard

This customer dashboard pulls important details from your ERP directly into Dynamics 365. Here, we're showing the Dynamics 365 Account Form integrated with SYSPRO ERP. We recommend pulling these key ERP details into your dashboard to help answer key sales and support questions.

How do we deliver?

No need to ask twice for key logistical details, like addresses and tracking numbers.

- Delivery addresses
- Shipping preferences

Is this a quality lead?

Pull key customer information from your ERP into your CRM to help support sales prospecting.

- Balance information
- Credit status
- Customer rating

What do they need?

Look up a customer's full sales history.

- Previous sales
- Pricing/contracts
- Volume of business
- Trends
- Seasonality

WHAT'S IN STOCK?

Product dashboard

Give sales a product-centric view of the customer to help better service accounts with details like inventory levels and delivery date estimates—all in one place. Here, we're showing Dynamics 365 with a SYSPRO ERP integration. We recommend pulling these key ERP details into your dashboard to help answer key sales and support questions.

What's available?

View the complete inventory.

- Product type
- Quantity
- Unit(s) of measure

Is it in stock?

Pull up what's in the warehouse.

- Quantity on hand
- Quantity allocated
- Quantity on backorder

The screenshot shows a product dashboard for '15 Speed Mountain Bike Girl'. At the top, there's a 'User Name' field and a navigation bar. Below that, the product name is displayed. The 'General' section contains fields for ID, Name, Subject, Unit Group, Default Unit, Currency, Product Type, Quantity On Hand, Unit, List, Supported, and Unit Price. The 'Description' section includes Vendor, Standard Cost, Vendor Number, Current Cost, Stock Weight, and Stock Volume. A 'SYSPRO Details' section is expanded, showing a table with columns for various attributes. At the bottom, there's a 'Note' section with a status indicator 'ACTIVE'.

How much is it?

Don't wait to get back to hot leads with pricing.

- Price list

Where is it?

Streamline the delivery process and timeline.

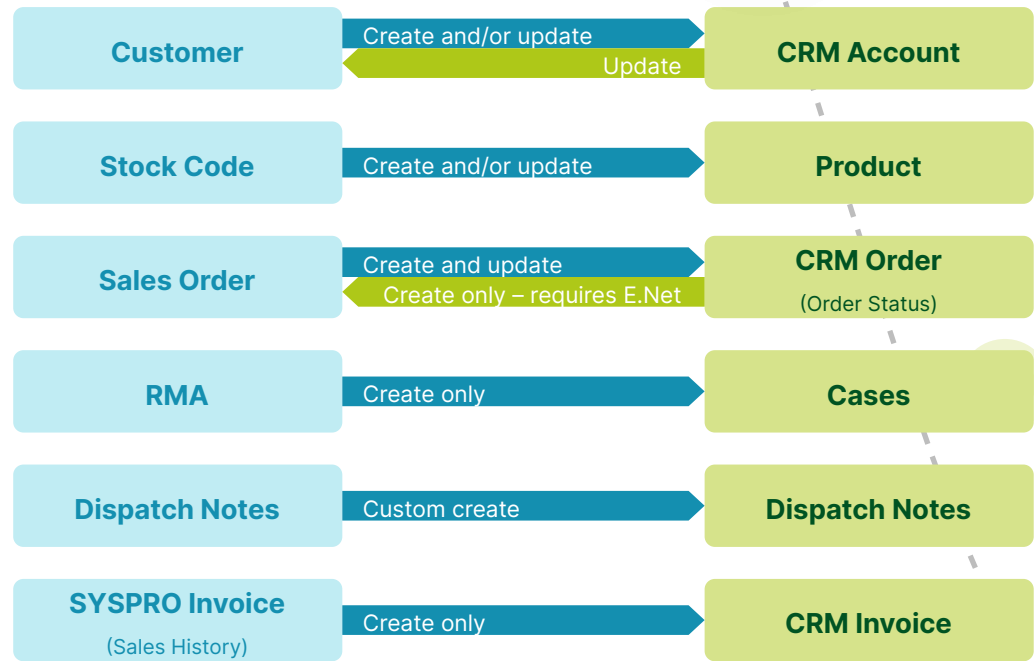
GET THE SOLUTION

So, how you do achieve these Dynamics 365/ERP integrations?

Dynamics 365 Connector for SYSPRO is our proprietary integration product that is pre-built and ready to customize to your needs. The integration passes data between Dynamics 365 and SYSPRO in both directions, so your Sales and Operations teams can both see the information they need to make key business decisions.

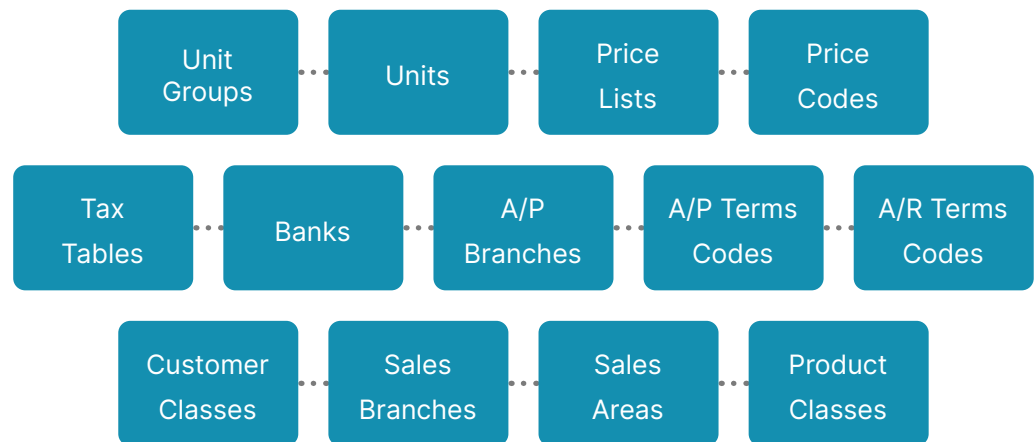
What would you add to your Dynamics 365 dashboard if you could easily pull in key data from your ERP?

SYSPRO



CRM

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



Let's talk about your ultimate Dynamics 365 dashboard!

Request a complimentary analysis of your CRM/ERP Integration requirements



1-855-7ON-LINE (1-855-766-5463)



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Let's talk!

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.

