

MS CRM Integrated View – Introduction

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I. Introduction

The Integrated View application is a fully integrated module between MS CRM and External Databases. It allows companies having MS CRM to integrate with their other systems or databases without any need to migrate the data into the CRM Databases.

This solution will save the cost of developing a migration and daily synchronization processes responsible for importing data to the MS CRM. Moreover, it reduces the size of the MS CRM databases that will enhance the performance of the MS CRM application.

The integrated view offers the CRM users the ability to search for records based on criteria within the external databases and the ability to view the resulting records from the external data inside the CRM interface.

II. Architecture

NETIKS developed web pages inside the MS CRM application, allowing CRM users to build their own search criteria in order to save the results into marketing lists and to view the external data. These pages communicate with the External database through NETIKS Connector as follows:

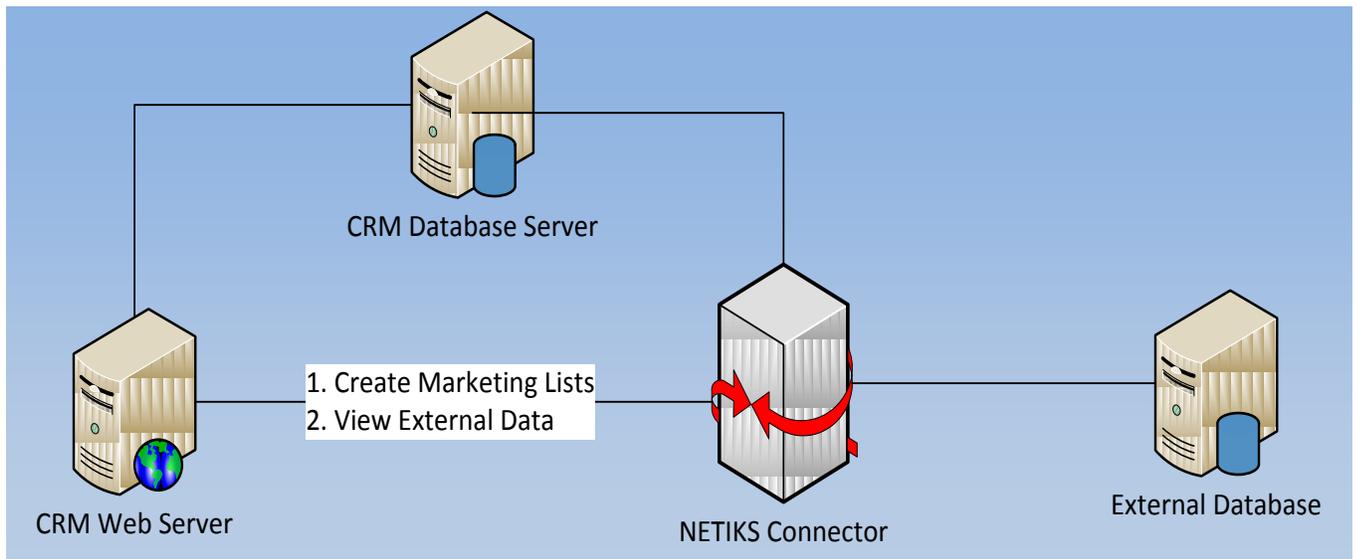


Figure 1 – Architecture

III. Search Module

The Search Module is a custom web application integrated in the CRM application. Its main purpose is to create marketing lists in MS CRM based on criteria and data from external databases. Moreover, it offers the functionality provided by MSCRM in the result of the default advanced find such as Assign, Share, Edit, and Export ... This will be done by building advanced queries that will run on a Database, provided and managed by the customer.

The screenshot shows a search interface with a 'Look for:' dropdown set to 'Contact'. Below this are several search criteria rows. The first row is expanded under an 'AND' operator, showing 'First Name' with the operator 'Contains Data'. The second row shows 'Last Name' with the operator 'Begins With' and the value 'a'. A third row is partially visible with the operator 'Is Greater Than or Equal T' and the value '10,000'. The interface also includes buttons for 'Details', 'Clear', 'Group AND', 'Group OR', and 'Delete'.

Figure 2 – Segmenting the customer database using external database fields

IV. View Module

The View Module is a custom web application integrated inside the CRM application for an entity record. It allows the user to get the information of a specific record from an external Database depending on a common field between the CRM Database and the external Database.

The information retrieved contains also a list of relationships to another entities or tables that allow the user to navigate to a related records displayed within a clickable grid.

Once the user clicks on a record in the grid, a new window pops up displaying the information of the record clicked with its relationships.

The screenshot shows a 'View Module Link' window with a tabbed interface. The 'Additional Info' tab is active, displaying a grid of fields and values. The fields are organized into two columns. The left column includes fields like 'Client Sequence', 'Birthday Foundation Date', 'ClientOpenDate', 'Last Name', 'Main Phone1', 'City', and 'Branch Code'. The right column includes 'Related Parties Count', 'Action Date', 'First Name', 'Short Name', 'Country Phone Code', 'Family Name', and 'Gender'. The values are displayed in text boxes, some containing text like 'FURNITURE AND PLASTIC' and 'INDUSTRIES (F.A.P.) SARL'.

Figure 3 – “View Module Link” displays detailed transactional data inside CRM screens