



INTOGRATE AX – CRM White paper

Use Lotus Notes mail, calendar, contact persons and journalizing in Dynamics AX CRM

In general

With the CRM Module for Dynamics AX, tight integration between a company's business management functions and the sales module can be achieved.

In connection with the management of activities in the CRM-system, it is essential that appointments and tasks can be synchronized with the user's calendar. Similarly, it is important to be able to use your e-mail system for sending e-mails from the CRM system.

The e-mail addresses of contact persons in the CRM system must of course be available when sending mails. The standard version of Dynamics AX CRM only supports Microsoft Outlook as mail and calendar client. But Intoint's Lotus Notes integration module for Dynamics AX CRM makes it possible to use the e-mail, calendar and contact person facilities of Lotus Notes.


Product information

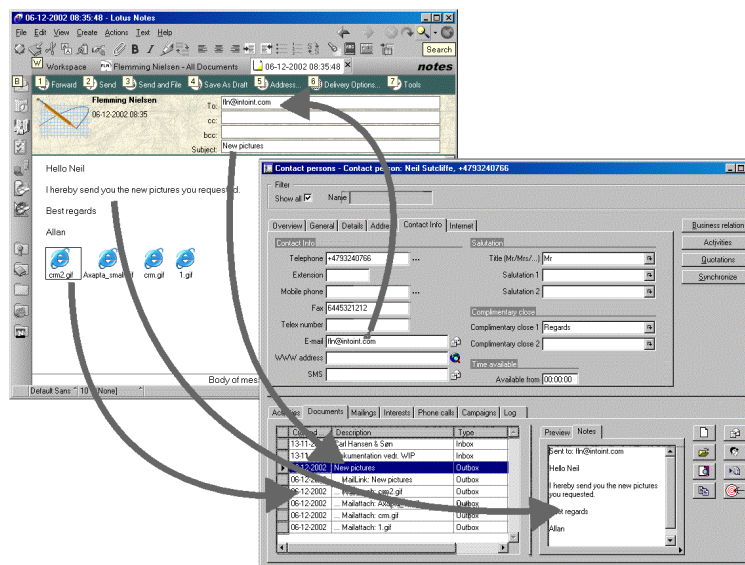
E-mail

In general, it will be possible to send Lotus Notes e-mail from all the locations in Dynamics AX where the e-mail function is visible.

In connection with reports, e-mail can be selected as the medium. Here, the receivers, the CC-receivers and the subject must be specified and the report will then be sent via Lotus Notes. The format of the report can be a plain text file (ASCII), a rich text file, HTML file or in PDF format.

The report will be sent without further user interaction. However, the system can be adjusted quite easily so that it will not send reports immediately but open the user's mail client for manual dispatch.

In the fields in Dynamics AX where e-mail addresses are maintained, a click on the e-mail icon () will open the user's mail client and the recipient address will automatically appear in the address field.



In the document management facility in the CRM module, it is possible to send documents by e-mail. The integration module also supports this facility. Lotus Notes e-mail sent to CRM contact persons and from the document management system can be filed in the document management system. The user can file a copy of the text in the mail and/or a link to the original mail and/or a copy of the attachments to the mail.

Where Dynamics AX CRM supports mail to groups, the integration module also supports this.

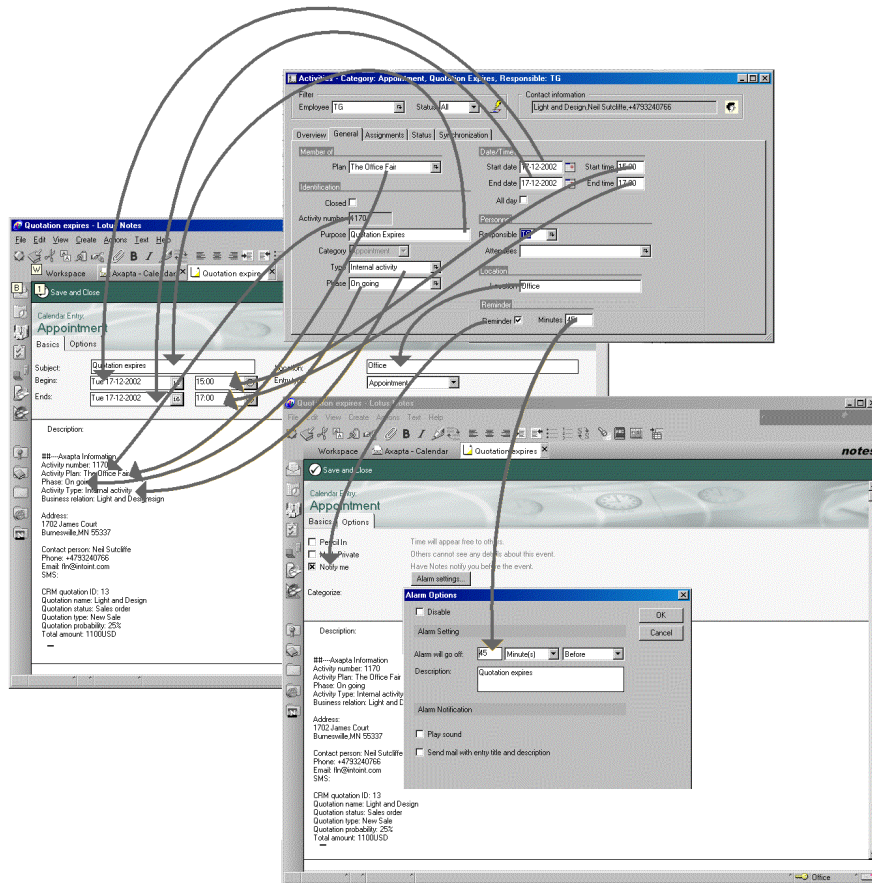
Calendar

Close integration between activities in Dynamics AX CRM and the calendar in Lotus Notes is important to the utilization of the CRM system.

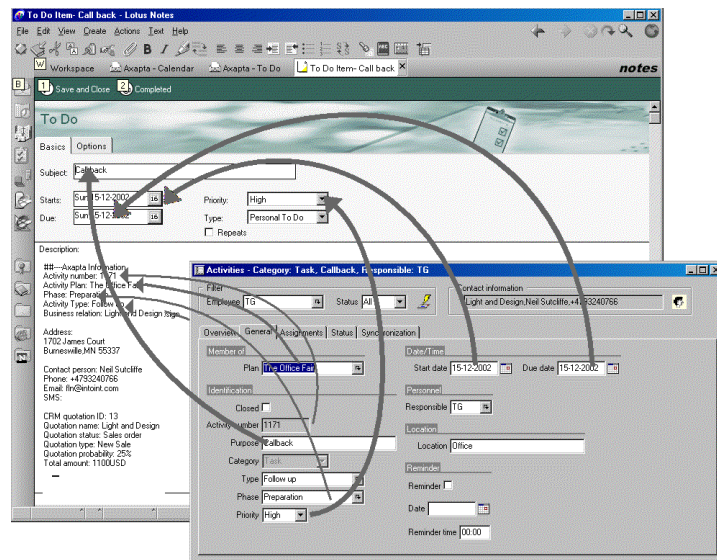
The integration kit supports both online transfers of activity information from Dynamics AX to Lotus Notes and batch synchronizations in which data are updated both in Dynamics AX and Lotus Notes.

Online transfers are used in connection with changes in appointments and tasks in Dynamics AX CRM. Appointments must be updated in Lotus Notes calendar whereas tasks must be updated in Lotus Notes ToDo list. The transfer takes place automatically without user interaction. The Lotus Notes client does not have to be open.

The built in business logic of Dynamics AX CRM is maintained so that e.g. only relevant appointments are updated – e.g. not past appointments – only future ones.



By synchronization, it is possible to update Lotus Notes data in Dynamics AX. If, e.g., the deadline of a task in Lotus Notes ToDo system has been changed, the corresponding task in Dynamics AX will be updated.

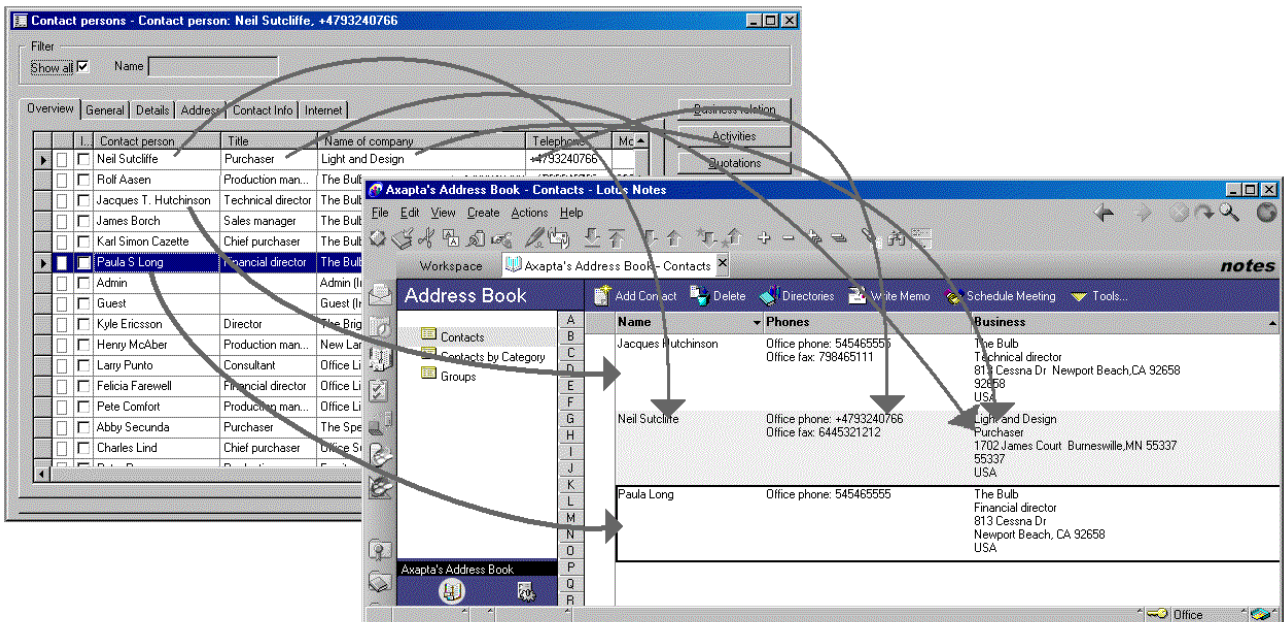


Here too, the system is based on the built-in standard routines of Dynamics AX CRM.

Contact persons

Normally, information about contact persons is maintained in Dynamics AX CRM. With the integration module, however, it is possible to use the information about contact persons in both Dynamics AX and Lotus Notes without having to maintain the information in both systems.

Information about contact persons can be transferred to Lotus Notes so that the information can be searched when a user wants to send e-mail – even when he or she is sitting in an airplane on the way to Paris. As was the case with the calendar information, it is also possible to synchronize the contact information both ways between Dynamics AX CRM and Lotus Notes.



Facts sheet

E-mail integration system

- ▶ Supports Lotus Notes from version 4.5
- ▶ Set up of MAPI is not required
- ▶ Supports CC and BCC
- ▶ Supports attachments
- ▶ Supports validation of dispatch
- ▶ Use of document ID (UNID) in e-mails for later editing in Dynamics AX
- ▶ Support of record keeping
- ▶ Possibility of calling e-mail via document link.
- ▶ Reading of attachments in sent e-mails
- ▶ Use of e-mails without activating mail client
- ▶ Sending of e-mails through mail client dialogue
- ▶ No set up required in Dynamics AX
- ▶ Possibility to define for each user if
 - ▶ records are to be kept of mails
 - ▶ mail link is to be saved
 - ▶ attachment are to be saved

Calendar integration.

- ▶ Online integration between activities and users calendar
- ▶ Update of existing appointments and tasks in Dynamics AX by synchronization
- ▶ Handling of both meetings, appointments and tasks (ToDo's)
- ▶ Possibility to define for each user:
 - ▶ Lotus Notes server
 - ▶ Calendar database

The following fields will be transferred to Lotus Notes:

- ▶ Start date and start time
- ▶ End date and end time
- ▶ Purpose
- ▶ Location
- ▶ Participants
- ▶ Memo
- ▶ Priority
- ▶ Alarm
- ▶ Alarm time
- ▶ Account (to category field)
- ▶ In addition, standard CRM information (activity number, plan, type, stage, etc.) is transferred to the Comments field in Notes

The following information will be transferred to Dynamics AX from Lotus Notes:

- ▶ Start date and start time
- ▶ End date and end time
- ▶ Purpose
- ▶ Location
- ▶ Participants
- ▶ Memo
- ▶ Priority
- ▶ Account
- ▶ Alarm
- ▶ Alarm time

Contact Person

- ▶ Online integration between select contact persons and the current user's local address book
- ▶ Update of changed contact person information from Lotus Notes to Dynamics AX
- ▶ Possibility of specifying the sever and database to be used for the integration of contact person information for each user
- ▶ No adjustment of the standard address book in Lotus Notes
- ▶ The integration hit transfers fields within the following areas:
 - ▶ Names (first name, middle name and last name)
 - ▶ Addresses
 - ▶ Phone number
 - ▶ E-mail and web addresses
 - ▶ Personal information: birthday, title, etc.

Development tools

The integration module contains a finished application for Dynamics AX CRM, which makes it possible to use the system without having to do any programming.

However, the included developer resources (classes) enable the customer to develop further integration features between Dynamics AX CRM and Lotus Notes.

Setup

The integration module can be installed in Axapta 3.0 and Dynamics AX 4.0, 2009 and 2012. CRM module must be installed also.

The module supports Lotus Notes version 5.0 or newer versions.

No adjustments in Lotus Notes are required.

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