



INTOGRATE NAV – CRM

White paper

Integration of Mails, Calendar, Contact persons and automatic mail journaling between Microsoft Dynamics NAV and Lotus Notes.

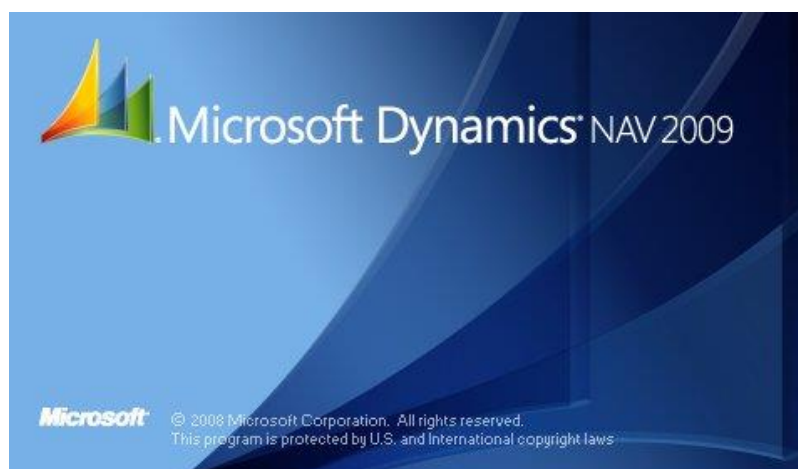
In general

With the CRM module for Dynamics NAV you can achieve close integration between a company's business management functions and the sales process.

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

Contact persons in the CRM system must of course also be available for sending e-mails.

The standard version of Dynamics NAV CRM supports only Microsoft Outlook as e-mail and calendar client. With INTOGRATE NAV – CRM, it is possible to use the e-mail, calendar and contact person facilities of Lotus Notes.



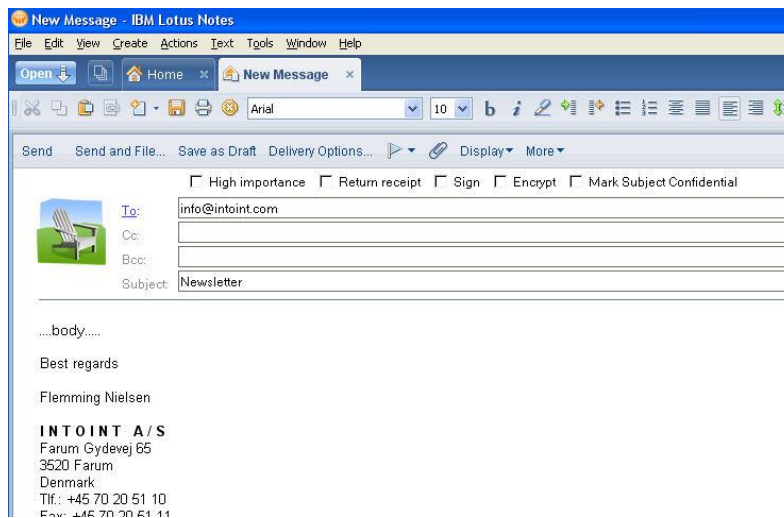
Product information

E-mail

From wherever the e-mail icon appears in Dynamics NAV, it is possible to send an e-mail via Lotus Notes. The below figures show an example from the contact person window.



The e-mail is created as a "New Memo" in Lotus Notes and it will thus be possible to add additional information before sending it:



Furthermore, the e-mail integration supports the sending of e-mails in the background. Order confirmations e-mailed from the service module will automatically be sent via Lotus Notes.

Calendar

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

INTOGRATE NAV – CRM supports both online transfer of activity information from Dynamics NAV to Lotus Notes and periodic synchronisation with data synchronisation in both systems.

Online transfer takes place when tasks are changed in Dynamics NAV CRM. The tasks will be updated in Lotus Notes' calendar or ToDo list depending on the type of task. The update takes place automatically without user interaction and it is not a requirement that the Lotus Notes client has been started.

The business logic of Dynamics NAV CRM is maintained so that e.g. only relevant appointments are updated – e.g. only appointments which do not occur in the past. The below figure shows a task which has been transferred to the calendar in Lotus Notes.

The screenshot shows a 'To-do Card' window in Dynamics NAV CRM. The title bar reads 'OP000051 Budget meeting - To-do Card'. The window has three tabs: 'General', 'Related Activities', and 'Recurring'. The 'General' tab is active, displaying various fields for the task. The 'No.' field contains 'OP000051', 'Status' is 'Not Started', 'Description' is 'Budget meeting', 'Priority' is 'Normal', and 'Type' is 'Meeting'. Other fields include 'Location' (Office), 'Salesperson Code' (AH), 'No. of Attendees' (2), 'Attendees Accepted No.' (0), 'Contact No.' (Multiple), 'Contact Name', 'Contact Company Name', 'Team Code', and 'Completed By'. On the right side, there are fields for 'Starting Date' (04-03-10), 'Starting Time' (15:00:00), 'Duration' (30 minutes), 'Ending Date' (04-03-10), and 'Ending Time' (15:30:00). There are also checkboxes for 'All Day Event', 'Canceled', and 'Closed', and a 'Date Closed' field. At the bottom, there are buttons for 'To-go', 'Functions', 'Create To-do', and 'Help'.

The screenshot shows a Lotus Notes calendar entry for 'Budget meeting'. The window title is 'Budget meeting - IBM Lotus Notes'. The interface includes a menu bar (File, Edit, View, Create, Actions, Text, Tools, Window, Help) and a toolbar. The main content area shows a 'Calendar Entry' for a 'Meeting'. The subject is 'Budget meeting' and the chair is 'Flemming Nielsen@ntoint'. The meeting starts on 04-03-2010 at 15:00 and ends at 15:30, with a duration of 30 minutes. The location is 'Office'. The 'Where' field is 'Reserved' with a note 'No rooms or resources have been reserved'. The 'Invites' section shows 'Invited' and 'No invites have been invited'. The 'Scheduler' section has a link to 'Click to see invite, Room and Resource availability'. The 'Description' section has a link to 'Click to append attachment(s)'. At the bottom, there is a section for 'Information from Nevision' with fields for 'No.' (OP000051), 'Contact no.', 'Contact name', 'Company', and 'Status' (Not Started).

In connection with periodic updates (batch or manual) a synchronisation can be performed which synchronises changes to tasks made in Lotus Notes with Dynamics NAV. By default, this update is performed at start-up of Dynamics NAV.

Contact persons

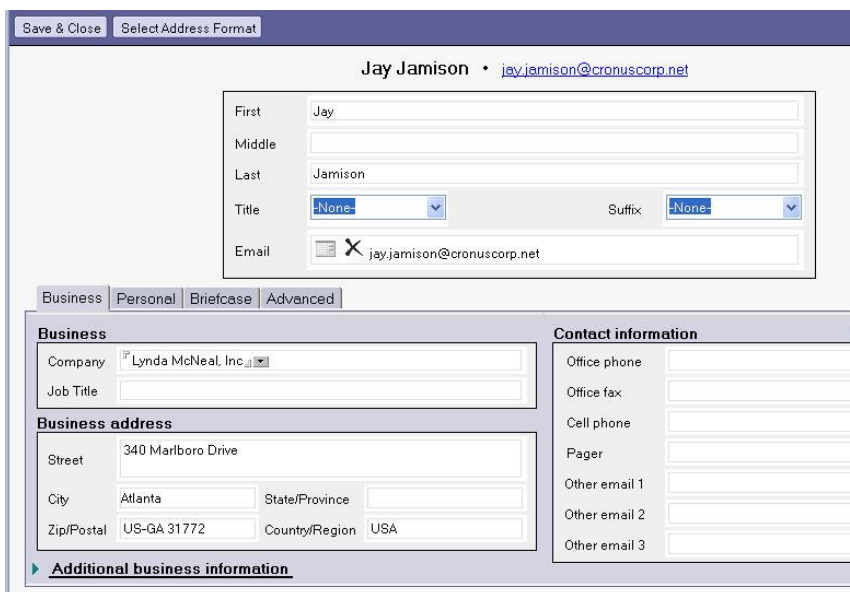
Contact persons are typically maintained in Dynamics NAV CRM where relations to companies, tasks, etc. can be created. INTOGRATE NAV – CRM enables the user to synchronise his contact persons with a specified address book in Lotus Notes. For example, it is possible for a Lotus Notes user to have a private address book and an address book for business contacts.

The below figures show an example of a user who has been created in Dynamics NAV and then transferred to the Lotus Notes address book.



The screenshot shows a Dynamics NAV window titled "KT200004 Jay Jamison - Contact Card". The window has tabs for "General", "Communication", "Segmentation", and "Foreign Trade". The "General" tab is active, displaying the following fields:

No.	KT200004	Search Name	JAY JAMISON
Type	Person	Phone No.	
Company No.	KT100014	Salesperson Code	AH
Company Name	Lynda McNeal, Inc	Salutation Code	K-GIFT
Name	Jay Jamison	Last Date Modified	
Address	340 Marlboro Drive	Date of Last Interaction	
Address 2		Last Date Attempted	
Post Code/City	US-GA 31772 Atlanta	Next To-do Date	
Country/Region Code	US		



The screenshot shows a Lotus Notes address book entry for "Jay Jamison" with email "jay.jamison@cronuscorp.net". The entry is displayed in a form with the following fields:

First	Jay
Middle	
Last	Jamison
Title	-None-
Suffix	-None-
Email	jay.jamison@cronuscorp.net

Below the name fields are tabs for "Business", "Personal", "Briefcase", and "Advanced". The "Business" tab is selected, showing the following information:

Company	Lynda McNeal, Inc.		
Job Title			
Business address			
Street	340 Marlboro Drive		
City	Atlanta	State/Province	
Zip/Postal	US-GA 31772	Country/Region	USA

On the right side, there is a "Contact information" section with fields for Office phone, Office fax, Cell phone, Pager, and three Other email fields.

Mail journaling

An important element of any CRM system is journaling of correspondence, documents, etc. between a company and its contact persons. The contact persons may be customers, suppliers, etc.

INTOGRATE NAV - CRM enables semi-automatic journaling of e-mails sent to and from Lotus Notes.

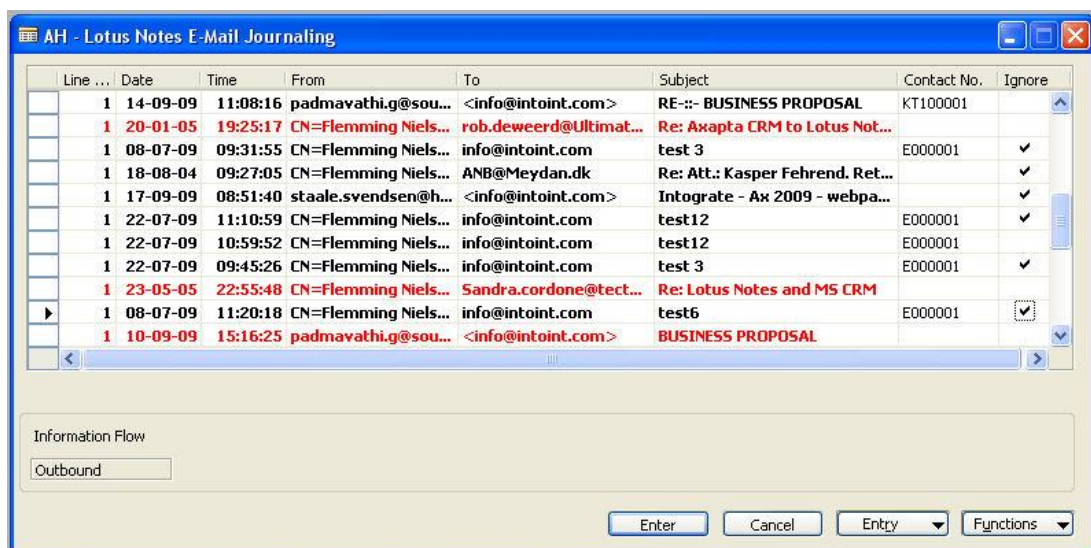
The system enables a Dynamics NAV CRM user to start "Mail journaling" which loads sent and received e-mails from Lotus Notes and automatically journals e-mails to and from contact persons. E-mails will be journaled as 'Interaction log entries' and will contain a link to the original e-mail in Lotus Notes.

E-mails sent to or from a person not immediately recognised by the system will be shown in a list from which it is possible to attach one or more e-mails to a contact person. It is also possible to opt not to file certain e-mails (either permanently or temporarily).

The list will show the e-mails where the contact person was found automatically. It is also possible to specify that one or more e-mails are not to be journaled. E-mails which the system cannot automatically link to a contact person will be marked in red. Going through all e-mails before the final "booking", i.e. the creation of "Interaction log entries" is thus easy and fast.

To further ease the journaling, it is possible to make a direct reference to the e-mail in Lotus Notes.

The below figure shows the e-mail list.

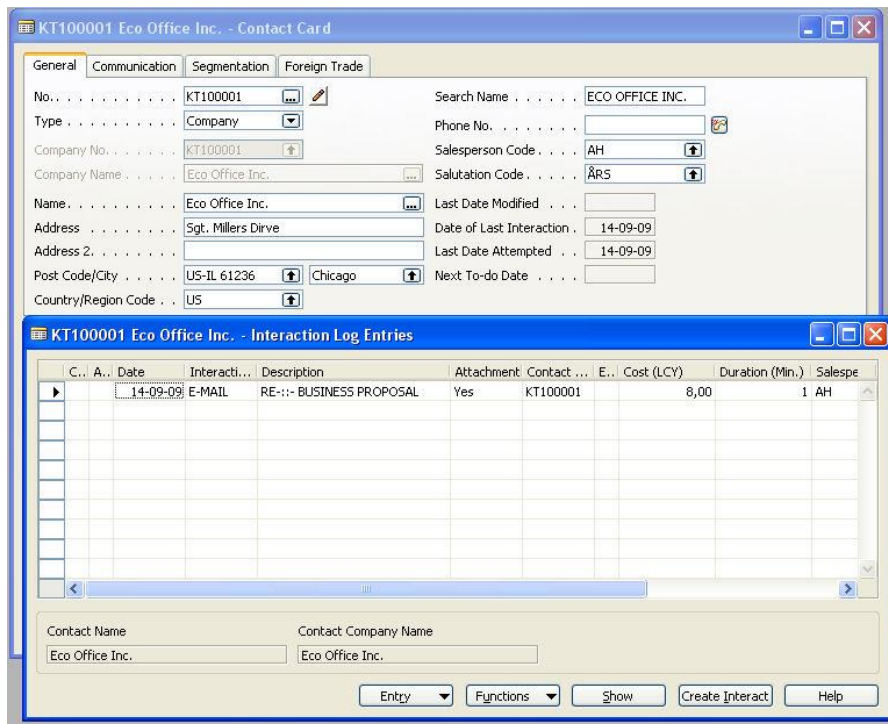


Line ...	Date	Time	From	To	Subject	Contact No.	Ignore
1	14-09-09	11:08:16	padmavathi.g@sou...	<info@intoint.com>	RE:- BUSINESS PROPOSAL	KT100001	
1	20-01-05	19:25:17	CN=Flemming Niels...	rob.deweerd@Ultimat...	Re: Axapta CRM to Lotus Not...		
1	08-07-09	09:31:55	CN=Flemming Niels...	info@intoint.com	test 3	E000001	✓
1	18-08-04	09:27:05	CN=Flemming Niels...	ANB@Meydan.dk	Re: Att.: Kasper Fehrend. Ret...		✓
1	17-09-09	08:51:40	staale.svendsen@h...	<info@intoint.com>	Intograte - Ax 2009 - webpa...		✓
1	22-07-09	11:10:59	CN=Flemming Niels...	info@intoint.com	test12	E000001	✓
1	22-07-09	10:59:52	CN=Flemming Niels...	info@intoint.com	test12	E000001	✓
1	22-07-09	09:45:26	CN=Flemming Niels...	info@intoint.com	test 3	E000001	✓
1	23-05-05	22:55:48	CN=Flemming Niels...	Sandra.cordone@tect...	Re: Lotus Notes and MS CRM		
1	08-07-09	11:20:18	CN=Flemming Niels...	info@intoint.com	test6	E000001	✓
1	10-09-09	15:16:25	padmavathi.g@sou...	<info@intoint.com>	BUSINESS PROPOSAL		

Information Flow
Outbound

Enter Cancel Entry Functions

The below figure shows a booked e-mail.

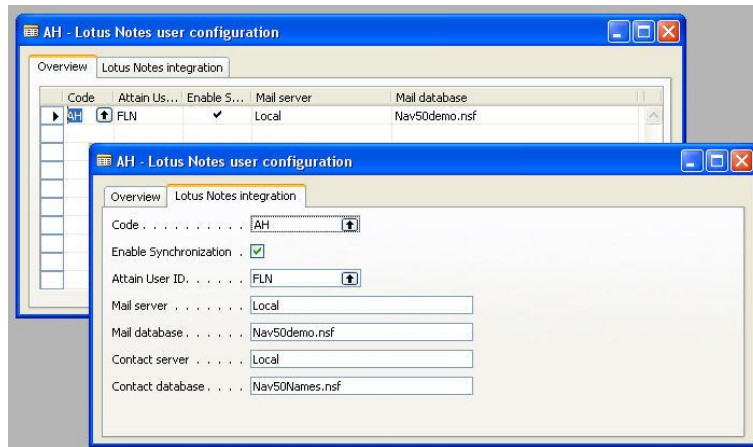


Clicking on the 'SHOW' button will open the journalised e-mail in Lotus Notes. The e-mail which appears is actually a copy of the original e-mail. This makes it possible for all Attain users to access the journalised information.

Setup

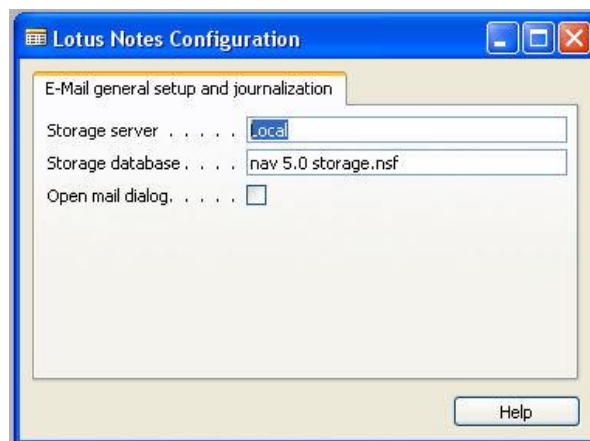
The setup of the integration facility is quite simple and like the installation, it requires very little maintenance.

For each sales representative in Dynamics NAV CRM, a NAV user must be attached and various information must be specified for this user. The below figure shows the setup.



The mail journaling requires some setup as well. When journaling mails from the Attain user's mail files all mails selected for journaling are automatically copied to a storage database. This ensures that all company relevant e-mail correspondence is stored in a central place.

The storage database is typically a Lotus Notes database based on the standard mail template used in the company. The setup requires the name of the server where the storage database resides (Storage server) as well as the location of the storage database.



Fact sheet

E-mail

- ▶ Supports Lotus Notes from version 4.5
- ▶ Support of CC and BCC
- ▶ Support of attachments
- ▶ Supports validation of sending
- ▶ Handling of document-ID (UNID) in e-mail, for post processing in Dynamics NAV.
- ▶ Support of filing
- ▶ Possibility of calling e-mails via document link
- ▶ Reading of attachments in sent e-mails.
- ▶ Sending of e-mails without activation of e-mail client.
- ▶ Sending of e-mails through e-mail client dialog.

Calendar

- ▶ Online integration from activities to current user's calendar.
- ▶ Update of existing appointments and tasks in Dynamics NAV through synchronisation.
- ▶ Handling of both meetings and tasks (ToDos).
- ▶ 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
- ▶ Memo
- ▶ Priority
- ▶ Alarm
- ▶ Alarm time
- ▶ In addition, standard CRM information (Contact person, company name, status, etc.) to 'comments' in Notes

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

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

Contact Persons

- ▶ Online integration from select contact persons to the current user's local address book.
- ▶ Update of changed contact person information from Lotus Notes to Dynamics NAV.
- ▶ Possibility to define server and database for each user for the integration of contact person information.
- ▶ Requires no adjustment of the standard address book in Lotus Notes.
- ▶ The Integration will transfer fields within the following areas:
 - ▶ Name (first, middle and last name)
 - ▶ Addresses
 - ▶ Phone numbers
 - ▶ E-mail and web address.
 - ▶ Personal information: birthday, title, etc.

Development tools

The integration module contains a complete application for Dynamics NAV CRM that enables use of the system without any need for programming.

But with the included developer resources (classes) it is possible to further develop the integration between Dynamics NAV CRM and Lotus Notes

Setup

The INTOGRATE module can be installed from Navision 3.6. The module supports Lotus Notes version 5.0 or later.

Further information:

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