



*Intuitive ERP to
Microsoft Dynamics CRM 4.0*

Creating an Unparalleled Business Advantage

Maximize visibility into sales activity and customer support through complete customer profile consistency and maximized visibility:

- **Customer Integration** – Synchronize customer information between Intuitive ERP and Dynamics CRM 4.0, eliminating duplicate data entry and enabling you to continuously work with real time customer information.
- **Quote Integration** – Offers the ability to quickly access accurate customer quotes between Intuitive ERP and Dynamics CRM 4.0, supports agile business process between field sales and accounting.
- **Order Integration** – Provides a completely automated order process between your Intuitive ERP and Dynamics CRM 4.0 systems, current updating of the latest order status information in Dynamics CRM.
- **Product Integration** – Enables your Intuitive ERP and Dynamics CRM systems to work from the same pricing and product catalog, and provides access to customer product history ensuring you have the latest information on order line items.

Intuitive ERP		Microsoft Dynamics CRM 4.0
Customer	↔	dbo.AccountBase, dbo.ContactBase
CustomerBillTo, CustomerShipTo	↔	dbo.AccountBase, dbo.ContactBase
PaymentTerm, PaymentTermDetail	↔	dbo.AccountExtensionBase
QuoteHeader	→	dbo.QuoteBase, dbo.OpportunityBase
QuoteLine, QuoteCost, QuoteDelivery	→	dbo.QuoteDetailBase
SalesOrder	→	dbo.SalesOrderBase
SalesOrderLine SalesOrderDelivery	→	dbo.SalesOrderDetailBase
Item	→	dbo.ProductBase, dbo.ProductAssociation, dbo.ProductSubstitute, dbo.ProductPriceLevelBase, dbo.DiscountBase, dbo.DiscountTypeBase

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Levels of Integration

Data Migration: Moving data “one way”, out of Intuitive ERP into Microsoft Dynamics CRM 4.0

- Intuitive ERP Customers – Dynamics CRM Accounts and Contacts
- Intuitive ERP Customer Bill To and Ship To – Dynamics CRM Customer Addresses
- Intuitive ERP Customer Financial Matrix – Dynamics CRM Account
- Intuitive ERP Pricing and Inventory – Dynamics CRM Product Catalog
- Intuitive ERP Customer Quotes – Dynamics CRM Quotes and Product Line Items
- Intuitive ERP Sales Order Processing – Dynamics CRM Orders and Product Line Items

Data Integration: Moving data “two ways”, into and out of Microsoft Dynamics CRM 4.0

- Dynamics CRM Accounts and Contacts – Intuitive ERP Customers
- Dynamics CRM Orders and Product Line Items– Intuitive ERP Sales Order Processing

