

Connecting salesforce.com with MS Dynamics NAV

Getting the full potential out of Salesforce.com & increasing sales



“Without RapidOnline we would still be suffering from not having access to our data instantly in one place - We are a very happy customer.”

Karla Sinclair, Operational Chief Manager at Homespice Décor Inc.



Integrating salesforce.com with MS Dynamics NAV

Homespice Decor, a family owned business importing and wholesales rugs and other décor items, had their salesforce.com licenses for six months, when Karla Sinclair was hired as a sales person. But only one person was using the system as a contact database completely separated from their customer and inventory database in MS Dynamics NAV. The company lacked the time to leverage the full potential of salesforce.com.

Homespice Decor has approximately 3000 products and a complex pricing system with up to 8 prices possible per product. Furthermore are the dealers also listed with different dealer levels. Before the integration all the information was only accessible from within MS Dynamics NAV.



Business Needs

- Easier way to access data from ERP system from anywhere
- Up-to-date and accurate information on customers and dealers
- Faster and more up-to-date reports on sales and inventory
- Help and support in getting salesforce.com and NAV to work together
- Flexible integration that can support a growing Business

Getting access to all their business accounting, inventory and sales orders in MS Dynamics NAV was not always a straight-forward process, as the company only had limited NAV licenses and often the sales people shared logins and accounts to get access. Further more this vital data was not available for the sales people out in the field. Karla Sinclair wanted to have all the data available inside salesforce.com to be able to access it from anywhere. Therefore she started looking for an integration solution. She found RapidiOnline and another vendor listed on the Appexchange. She contacted them both, but chose RapidiOnline for linking the two systems together.

Data accessible from anywhere

With integration they now have a complete list of all their items on stock and they can see what inventory is coming in. They can see orders, invoices and ledger entries. "Having all this information right there we now know straight away what we can deliver, which saves us a lot of time and effort. We

are now extending the integration by enabling order entry in salesforce.com and transferring these sales order from SFDC to NAV. We are very much looking forward to that. Being able to create our sales orders directly inside salesforce.com will be a huge advantage for us. This will enable our sales reps to process customer orders from anywhere at anytime - even right in front of the customer, which is something our competitors are not doing and probably won't be doing for some time. What a competitive advantage!" says Karla Sinclair. As we are attending several trade shows a year we will be able to create sales orders right at the trade show. In that way we can see right away what we have to order instead of having to wait days to get that overview. We will be able to act quickly on our clients demands.

"Having our salesforce.com and MS Dynamics NAV integrated, dramatically increased the value of salesforce.com since we can see all our information needed inside salesforce.com accessible from anywhere."

Karla Sinclair, Operational Chief Manager at Homespice Decor



Up-to-date information on customers and dealers

Now we have fresh and up-to-date data which is synchronised every 2 hours. The data is much more accurate which we can use towards i.e. our dealers. By having all this accurate and up-to-date data in one system gives us a much better overview of what items the dealers are reselling. This gives us the power and advantage to up sale to them, as we have the overview of what items they have and have not sold.

Better Visibility of Data

We have a concept we call Missed Promised Data, which are sales orders which delivery date is overdue. We are trying to reduce these cases. In this case it is particularly

Results

- Data accessible from anywhere anytime
- Homespace Decor can now market, respond and up-sale more effectively to their customers due to having more up-to-date and accurate data available
- Saving half a full time job a week because of more efficient work routines
- 100% full use of salesforce.com
- Saving NAV licenses
- Smooth Implementation with help and support

100% Use of salesforce.com

Having the data integrated now made a tremendous difference for the inside sales people. It is now so much easier for them to track their sales calls, as they have access to their data instantly in one system. Furthermore it has encouraged them to stay inside salesforce.com all the time. Now they don't have any excuse that they can't find their data needed, because it's right at their fingertip. The sales people also use salesforce.com for documentary types of work. Finally our customer support, who was used to only work with NAV has seen the advantage in using salesforce.com, because their data is also available in the system.

Improved decision making

The quick and easy access to the valuable data mix between salesforce.com and NAV enables us to be more efficient and as we now use the system for more than just a contact database, we have now a valuable data mix between salesforce.com and NAV which allows us to compare different metrics i.e our sales people's performance. The working process is more efficient, gives us a better overview and empowers us to make strategic decisions – quicker.

Solution

- Account/Customer two-way Integration
- Up-to-date product inventory available in SFDC
- All Pricelists automatically updated in SFDC
- Open Sales Orders transferred and kept up-to-date in SFDC
- Sales History and Payment History inside SFDC
- Order Entry in SFDC with automatic transfer to NAV

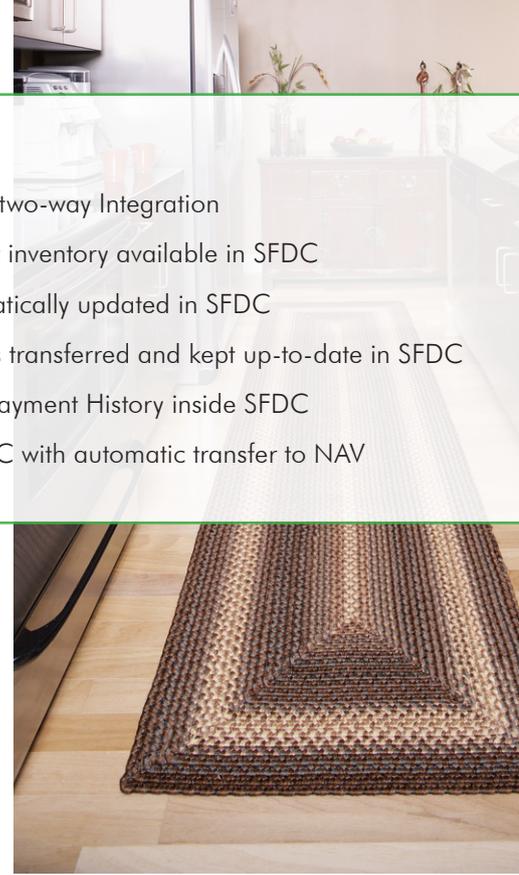
important that we have accurate up-to-date data and the ability to get a quick overview of what the MPDs are. We need to know when orders are coming in and when they can be delivered. Now we can create an MPD report and react proactive on that.

Creating Reports in Minutes

We now can create reports in minutes from within salesforce.com based on all the data from NAV. This saves us so much effort and time. Before Rapidionline we used to make nightly NAV reports. The report would then take 6-8 hours to be generated. Now we just create reports – even our inventory report - inside salesforce.com in a matter of minutes based on up-to-date data - not data from last night.

With Rapidionline you are not left by yourself. They help and advise you right from the start and I was certain that they were going to help me with all my integration issues.

Karla Sinclair, Operational Chief Manager at Homespace Decor



It's a big thing as a small company to commit to these monthly subscription fees. However, I do feel good about it, because we are already saving more than we pay and through RapidiOnline we as a fairly small company have the best-of-breed of systems - systems that big Fortune500 companies also use. After Karla Sinclair rolled out salesforce.com she got promoted to Operational Chief Manager, because she did so well implementing RapidiOnline.

With RapidiOnline we are saving a half full time employee a week, because we can get to the information right away. The information is there inside our salesforce.com, we don't have to produce it.

Karla Sinclair, Operational Chief Manager at Homespice Decor



Hands-on full support right from the start

The initial part went very smoothly and very well. We worked 3 days in a row to get everything setup and configured. After that it took about 6 weeks before we could do the actual first synchronisation, as we needed to scrub our database before that. That was when Michael went the extra mile with us to get that done quickly and as smooth as possible. I'm pretty sure we would not have gotten this extra support from the other vendor.

About Homespice Decor

HomeSpiceDecor is a family owned business with today 9 employees importing and whole sales rugs and other décor items from India. The company started its business in the US in 1998. They have 25.000 retailers throughout Canada and USA selling quality rugs and décor items. Homespicedecor imports the goods in and has both inside and outside sales people. The HQ with the warehouse is located in Tucker (Atlanta, Georgia). Apart from that they have showrooms in the mayor cities, such as New York, San Francisco etc. where the dealers come to buy their rugs. More on www.homespicedecor.com

"We chose Rapidi because I had the best feeling about RapidiOnline handling our integration issues. RapidiOnline's high expertise in integrating to NAV and its hands-on support right from the start, gave me that confidence and trust I needed to move on with the integration together with RapidiOnline."

Karla Sinclair, Operational Chief Manager at Homespice Decor

About RapidiOnline

RapidiOnline provides agile on-demand data exchange and data integration solutions. Our mission is to revolutionise how the world engages and deals with their data and systems – transforming data integration from a complex to a simple task. Since 1992 RapidiOnline's products have delivered value with a compelling combination of performance, flexibility and reliability. RapidiOnline has customers worldwide, that rely on us to manage and integrate their critical data. RapidiOnline is based in Denmark and France.

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