

elastic.io Integrates Cloud-based CRM Software with On-Premise ERP and eCommerce Software



Customer

fabric house



Business needs

Fabric House moves from the out-of-the-box CRM module within MS Dynamics Navision to the MS Dynamics CRM system. The new application has to be integrated with the existing software applications.

Challenge

1. Integrate cloud-based MS Dynamics CRM with on-premise MS Dynamics NAV and enable two-way synchronization
2. Integrate SPHERE.IO, an online shop software, with CRM and NAV
3. Integrate Logistics with NAV, CRM and SPHERE.IO

Solution

elastic.io deploys for Fabric House the elastic.io Integration Platform together with pre-defined, plug-and-play connectors to NAV, CRM and SPHERE.IO.

Benefits

1. Reduction of monthly costs by 85% and setup costs by 90%
2. Comprehensive monitoring of synchronized data across all integrated systems
3. Fast project implementation: time spent on integration is reduced by up to 85%
4. Scalable solution based on the pay-as-you-grow pricing model
5. Easy and fast integration of other applications if needed in the future
6. Highly secure environment: elastic.io Integration platform is hosted by T-Systems in Germany, data is subject to the most stringent privacy policies in the world.

Fabric House is a B2B wholesaler from Italy offering a wide range of exclusive high quality fabrics for small businesses, startups and fashion designers. The company decides to go for the Microsoft Dynamics CRM online solution and wants to integrate it with their MS Dynamics Navision on-premise, the online shop software SPHERE IO and later with Logistics. For this project, Fabric House selects the elastic.io integration solution.

Business Needs

Fabric House has been using the Microsoft Dynamics NAV ERP system together with its small out-of-the-box CRM modul. However, the steady business growth increased the need of a more professional CRM solution.

"Introducing a stand-alone CRM system is essential for Sales in the first place: the complete sales process including lead management, opportunities management and correspondence with end customers should now be handled via CRM", explained Johann Trischberger, CEO Fabric House.

Controlling is another important area that should be covered by the new CRM system: CRM offers most comprehensive ways to evaluate marketing and sales efforts offering a complete overview of objectives, budget management, transformation of new leads into opportunities, the origin of new leads and which marketing campaigns generated them. Although the small CRM modul within the MS Dynamics NAV could provide this data as well, it required extra time and efforts: lots of data had to be additionally evaluated in Excel.

Further important reason for choosing a stand-alone CRM solution was the Customer Care area, which Fabric House is going to introduce in the nearest future. All records about service requests, complaints, technical queries, etc. were supposed to be collected in a CRM system offering any employee involved into a corresponding interaction a full access to its history.

Fabric House chose the online version of the MS Dynamics CRM system: the company is implementing cloud strategy and besides, a cloud version would help Fabric House reduce administrative costs.

Challenge

Fabric House knew from the beginning that the new CRM system had to be integrated with the existing ERP system: "In order to really optimize processes, it should be possible to maintain all transaction data as well as all orders in one place. The integration should also allow easy data exchange between the two systems," said Johann Trischberger.

The focus was set on mapping the data that Fabric House had defined for themselves as standard data. Therefore, the solution they were looking for had to reflect standard fields by default. Any specific adjustments and customization could have been implemented later as part of smaller development projects.

The integration had to fulfil the following criteria:

- Clear monitoring for easier data maintenance
- Reasonable installation costs
- The project implementation shouldn't be considerably more complex from the financial and technical standpoint than the introduction of the new CRM system
- The future integration of the online shop, shipping agents, suppliers, etc. should be possible without extra efforts

Solution

Fabric House was looking for an integration solution that was affordable, would be easy to implement and would work straight out-of-the-box. After a head-to-head comparison, the company chose in favour of the elastic.io integration platform as-a-service (iPaaS).

First, elastic.io Platform comes with preconfigured and reusable connectors to numerous business software applications, cloud as well as on-premise. The eCommerce solution that is installed at Fabric House is among these. The connectors work out-of-the-box and map standard fields between systems, thus ensuring synchronisation of the data that is essential for business.

Secondly, elastic.io impressed with its flexibility and transparency during the process of defining the required functionalities and project scope as well as with how soon the objectives of the project were set. The integration project for Fabric House was divided into three phases, with the first phase covering the creation of standard connectors for MS Dynamics CRM (Cloud) and MS Dynamics NAV (On-Premise). Following the MS Dynamics Dokumentation, Fabric House defined the following data as standard data: contacts, customers, offers, orders, items, units, currencies and invoices.

At this point, the implementation of the technology allowing two-way synchronisation of customer and contact data between CRM and NAV was a special marker during the first project phase. The challenge gladly taken by the elastic.io IT team lay in mapping the different data models between NAV and CRM efficiently: several areas like e.g. price finding, contact data or units are dealt with in these two systems in very different ways.

The second project phase involved integration of the online shop built with SPHERE.IO, a German eCommerce solution, with MS Dynamics CRM and MS Dynamics NAV. Since elastic.io already has the appropriate connector, which is a plug-and-play and out-of-the-box solution, the online shop will be integrated with the CRM and ERP systems without any extra integration efforts. The integration will allow, for example, new signups in online shop to be automatically transferred to CRM as new leads, or a new sample order in online shop to automatically generate a new contact and a sales offer in NAV.

The third project phase encompasses the integration of Logistics - DHL and DBSchenker -, with MS Dynamics NAV, MS Dynamics CRM and the online shop software. The main aim is to register delivery directly from MS Dynamics NAV and notify customers about any changes in order status.

Benefits

The cloud-based elastic.io integration platform as-a-service (iPaaS) acts as a bridge between on-premise applications, private and public clouds. Thanks to the pre-defined connectors to numerous cloud- and on-premise applications like Salesforce or Microsoft Dynamics, complicated and usually cost-intensive internal integrations are no longer necessary. Additional connections e.g. to a Finance system that might be required in the future become, thus, considerably more cost-effective.

"However, I'd say that the biggest advantage of elastic.io shouldn't be assessed in monetary terms. It's their flexibility and readiness to get down to the project implementation now - this is what convinced us to work with elastic.io in the first place."

- Johann Trischberger, CEO Fabric House

But elastic.io had a significantly greater advantage also in financial terms: through the implementation of the elastic.io solution, Fabric House saves 85% of monthly costs and 90% of setup costs. In addition to that, the elastic.io connectors can do a lot more in terms of integration:

"As far as I know, there is no similar solution as plug-and-play on the current market."

- Johann Trischberger, CEO Fabric House

Short decision-making channels as well as readiness for an immediate implementation of requirements were pointed out by Fabric House especially. "We agreed on the project objectives and defined the connectors functionalities very quickly. The contact to the programmers, to the project team was very direct and also very efficient. It was a very positive experience for us," added Johann Trischberger.

"The integration of our online shop with MS Dynamics CRM and NAV via elastic.io will save us a lot of work, because we'll have to maintain data only once and we'll have all the systems that we need at our disposal. Besides, the elastic.io Platform offers comprehensive monitoring of synchronized data across all integrated systems. Thanks to this, system errors can be detected much easier and faster."

Not only the company, but also its customers will benefit from the comprehensive integration of the systems; for example the introduction of CRM will allow to shorten service time and response time, leading to a greater transparency.

elastic.io integration platform is hosted by T-Systems in Germany. Through the German protection of privacy laws, all data of Fabric House customers is subject to the most stringent privacy policies in the world.



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