



Dynamics CRM 4 integration with SharePoint 2010

Executive Summary

Our client is a leading service provider in the field of renewable energy and is operational in biomass and energy projects in Europe. They have managed their business with cutting edge technologies like SharePoint 2010 and Microsoft Dynamics CRM etc. They have developed their application to support their employee workspace in SharePoint 2010, and maintained all sales related activity in Dynamics CRM 4 which helped their business build profitable customer relationship by shortening sales cycles and improving customer loyalty through day-to-day tasks for sales, customer service, opportunity etc.

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Their primary concern was to develop a system to communicate CRM 4 interface with SharePoint 2010. To be precise, he wanted us to create a project folder in the document library of SharePoint 2010 while an opportunity creates in the CRM System.

About our Client

Client Biomass Heating Specialist | **Location** Scotland | **Industry** Renewable Energy

Business Situation

The primary requirement of our client was to integrate Microsoft SharePoint 2010 with Dynamics CRM 4 to communicate and access documents from SharePoint document management library and populate in the CRM environment. He wanted us to create a project folder in SharePoint system for every opportunity that is created in Dynamics CRM 4 interface. After the folder is created in the SharePoint document management system, all relevant documents can be uploaded/ saved through SharePoint system and it can be viewed in Read-Only mode at CRM system with an intranet page.

Solution Details

The Mindfire Solution

With all clients' requirements and SRS document our Offshore MS Dynamics CRM experts along with Microsoft SharePoint team analyses and find the solutions to meet the needs.

Our CRM experts developed a custom work-flow activity (plug-in) through which on creation of every opportunity one project folder will get created in SharePoint document library where documents related to that



project/ opportunity can be uploaded into the SharePoint 2010 environment. All the folders created in SharePoint side maintains a hierarchy and CRM user can view it through a customer landing page on basis of the permission they have been given by the administrator. The SharePoint experts developed multiple services that were consumed on the CRM side and were used to add folders / retrieve documents from within a specific Project folder.

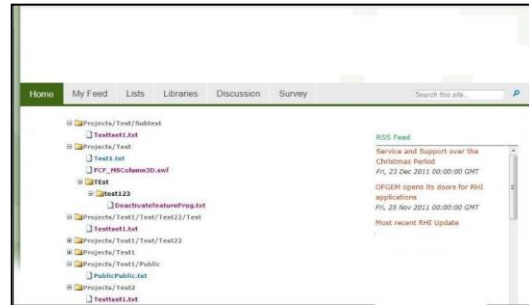
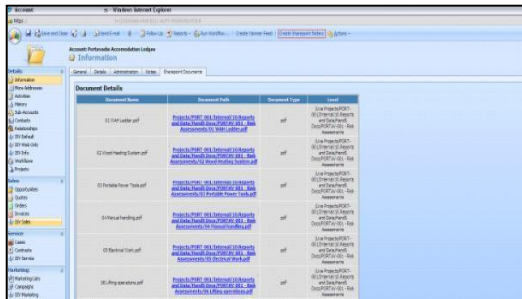
Achievements

It was a really challenging job for our offshore CRM and SharePoint team to sort-out the client's needs. The tough job was to communicate SharePoint system through CRM environment. Despite of all critical situations our developers gave robust solutions to the client which met all his requirements.

Technologies

MS-CRM 4.0, SharePoint 2010, Asp. Net, JavaScript, SQL Server 2008.

Final Results Software System





Customer Benefits

With our given solution for Dynamics CRM 4 and SharePoint 2010, our client streamlined his day-to-day work. His CRM user can easily communicate to the SharePoint 2010 environment. All the information along with the opportunities saves at SharePoint side and Dynamics CRM user can view it on basic of their permission which is saves lots of our client's time.

Future relationship

The client had a good experience with Mindfire Solutions and was very happy. He is running his business very smoothly with our solutions. He is still continuing with us with another Online CRM task.

