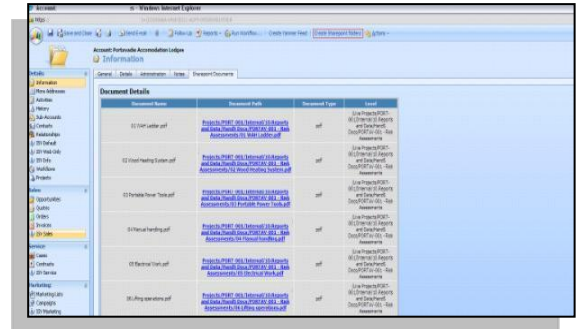




Dynamics CRM 4 integration with SharePoint 2010

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.



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.

Technologies

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