

Axapta CRM - Lotus Notes Integration Module

Lotus Notes as mail and calendar client for Axapta CRM.

General

With the CRM Module for Axapta, tight integration between a company's business management functions and the sales module can be achieved.

In connection with the management of activities in the CRM-system, it is essential that appointments and tasks can be synchronized with the user's calendar. Similarly, it is important to be able to use your e-mail system for sending e-mails from the CRM system.

And the e-mail addresses of contact persons in the CRM system must of course be available when sending mails.

The standard version of Axapta CRM only supports Microsoft Outlook as mail and calendar client. But Intoint's Lotus Notes integration module for Axapta CRM makes it possible to use the e-mail, calendar and contact person facilities of Lotus Notes.

E-mail

In general, it will be possible to send Lotus Notes e-mail from all the locations in Axapta where the e-mail function is visible.

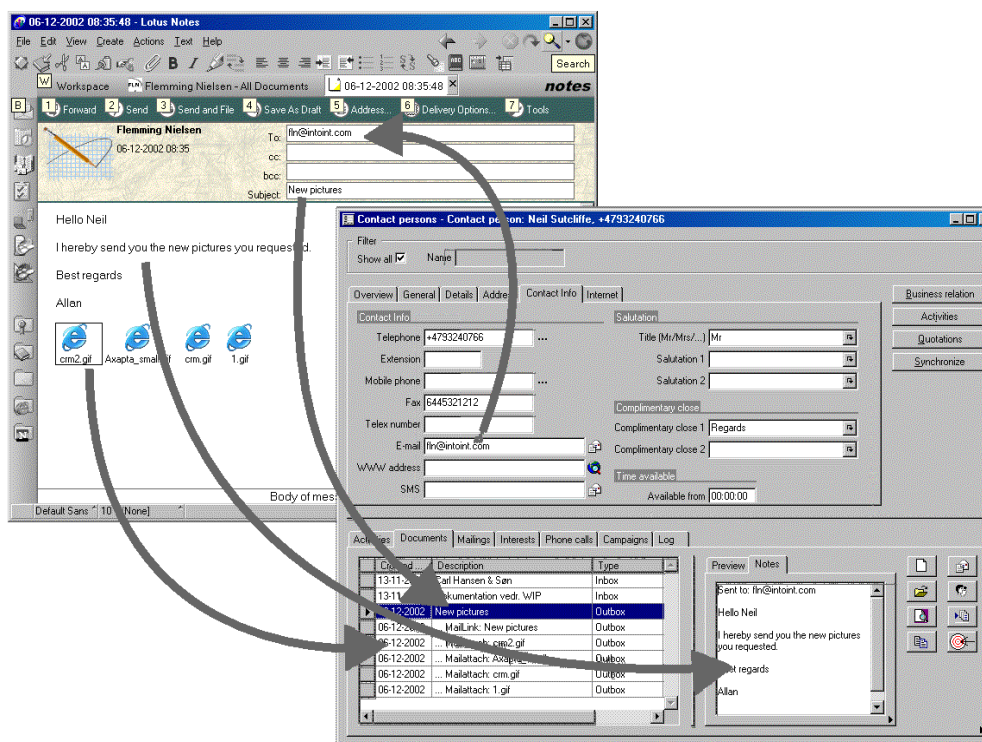
In connection with reports, e-mail can be selected as the medium. Here, the receivers, the CC-receivers and the subject must be specified and the report will then be sent via Lotus Notes. The format of the report can be a plain text file (ASCII), a rich text file or HTML file. Axapta 3.0 also supports the PDF format.

The report will be sent without further user interaction. However, the system can be adjusted quite easily so that it will not send reports immediately but open the user's mail client for manual dispatch.

In the fields in Axapta where e-mail addresses are maintained, a click on the e-mail icon (✉) will open the user's mail client and the recipient address will automatically appear in the address field.

In the document management facility in the CRM module, it is possible to send documents by e-mail. The integration module also supports this facility.

Lotus Notes e-mail sent to CRM contact persons and from the document management system can be filed in the document management system. The user can file a copy of the text in the mail and/or a link to the original mail and/or a copy of the attachments to the mail.



Where Axapta CRM supports mail to groups, the integration module also supports this.

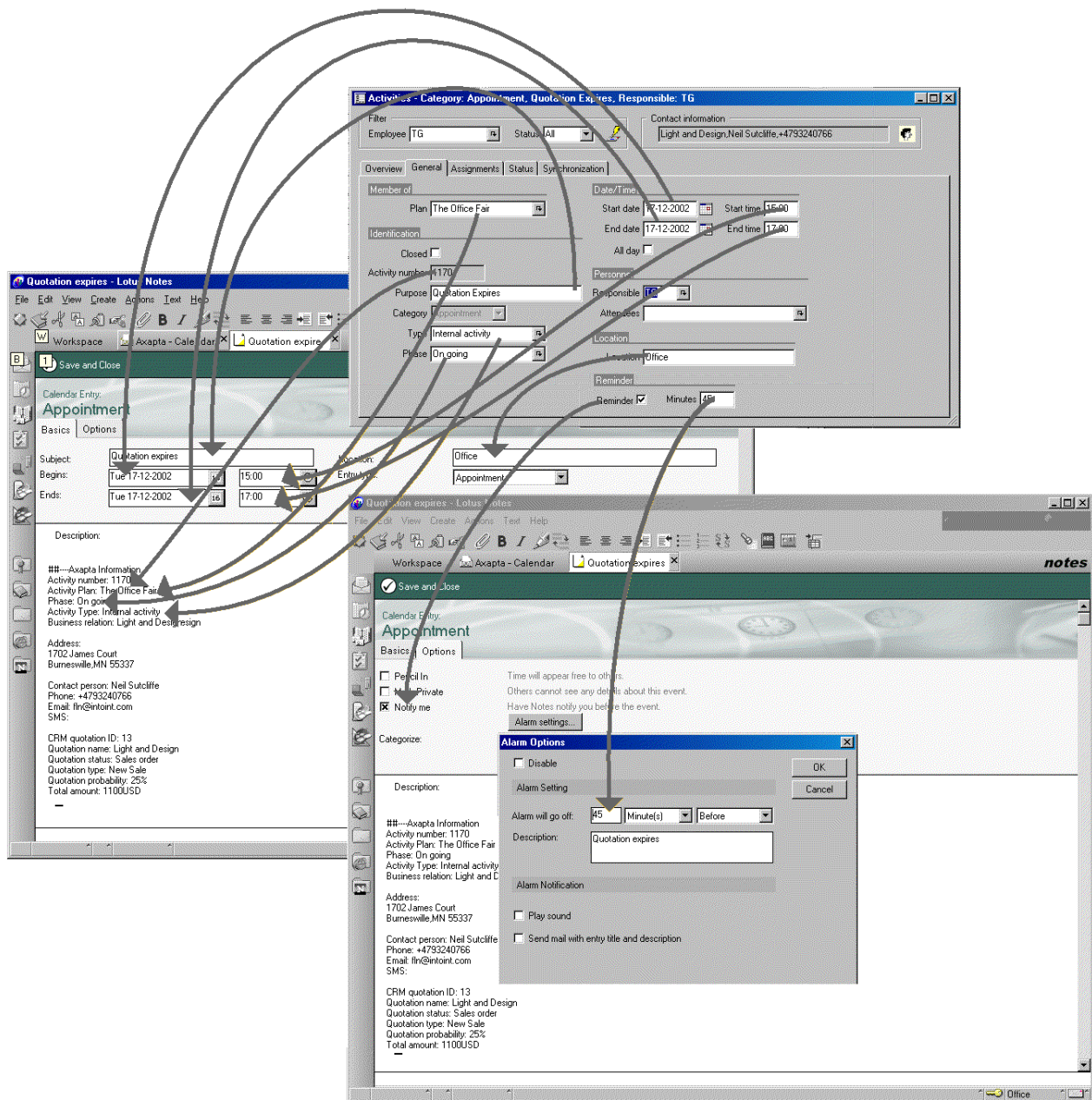
Calendar

Close integration between activities in Axapta CRM and the calendar in Lotus Notes is important to the utilization of the CRM system.

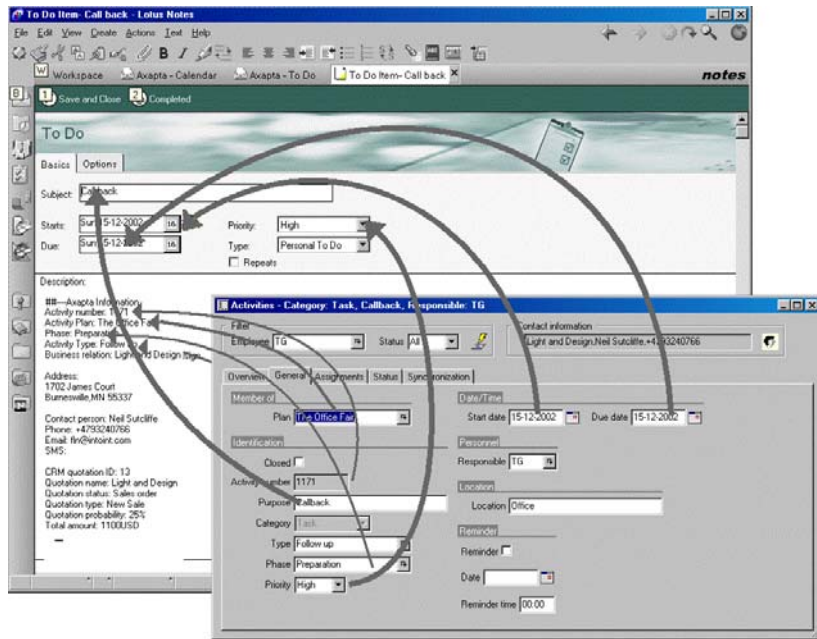
The integration kit supports both online transfers of activity information from Axapta to Lotus Notes and batch synchronizations in which data are updated both in Axapta and Lotus Notes.

Online transfers are used in connection with changes in appointments and tasks in Axapta CRM. Appointments must be updated in Lotus Notes calendar whereas tasks must be updated in Lotus Notes ToDo list. The transfer takes place automatically without user interaction. The Lotus Notes client does not have to be open.

The built in business logic of Axapta CRM is maintained so that e.g. only relevant appointments are updated – e.g. not past appointments – only future ones.



By synchronization, it is possible to update Lotus Notes data in Axapta. If, e.g., the deadline of a task in Lotus Notes ToDo system has been changed, the corresponding task in Axapta will be updated.

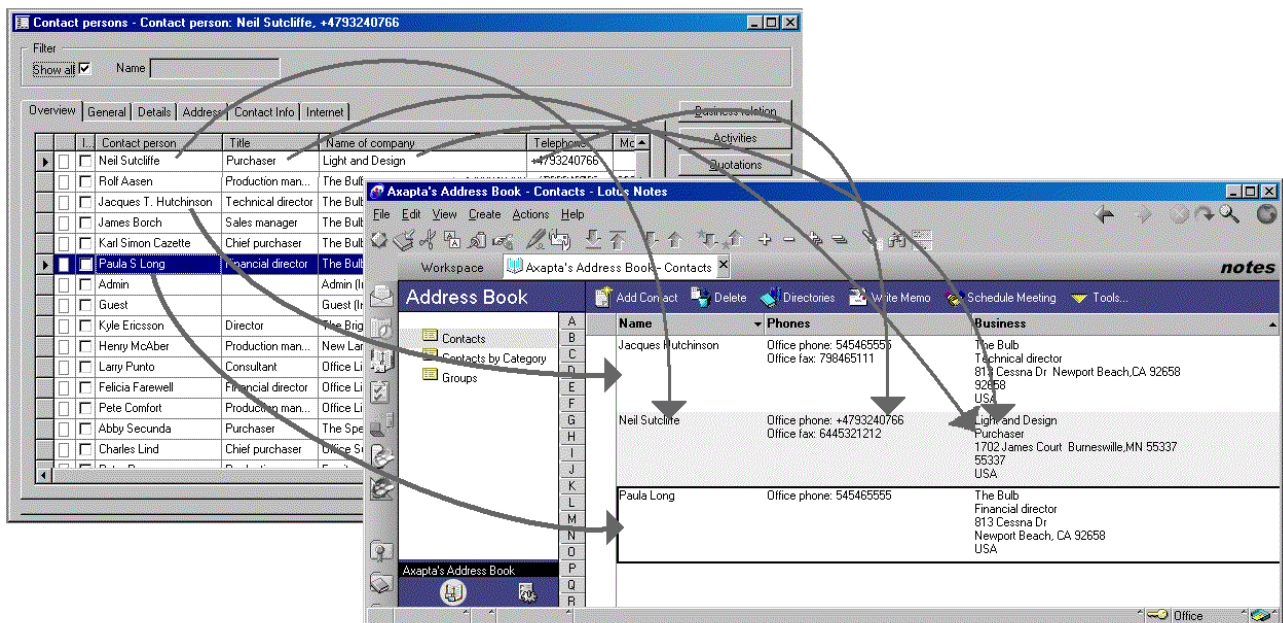


Here too, the system is based on the built-in standard routines of Axapta CRM.

Contact persons

Normally, information about contact persons is maintained in Axapta CRM. With the integration module, however, it is possible to use the information about contact persons in both Axapta and Lotus Notes without having to maintain the information in both systems.

Information about contact persons can be transferred to Lotus Notes so that the information can be searched when a user wants to send e-mail – even when he or she is sitting in an airplane on the way to Paris. As was the case with the calendar information, it is also possible to synchronise the contact information both ways between Axapta CRM and Lotus Notes.



E-mail integration system

- Supports Lotus Notes from version 4.5
- Set up of MAPI is not required
- Supports CC and BCC
- Supports attachments
- Supports validation of dispatch
- Use of document ID (UNID) in e-mails for later editing in Axapta
- Support of record keeping
- Possibility of calling e-mail via document link.
- Reading of attachments in sent e-mails
- Use of e-mails without activating mail client
- Sending of e-mails through mail client dialogue
- No set up required in Axapta
- Possibility to define for each user if
 - o records are to be kept of mails
 - o mail link is to be saved
 - o attachment are to be saved

Calendar integration.

- Online integration between activities and current user's calendar
- Update of existing appointments and tasks in Axapta by synchronisation
- Handling of both meetings, appointments and tasks (ToDo's)
- Possibility to define for each user:
 - o Lotus Notes server
 - o Calendar database

The following fields will be transferred to Lotus Notes:

- Start date and start time
- End date and end time
- Purpose
- Location
- Participants
- Memo
- Priority
- Alarm
- Alarm time
- Account (to category field)
- In addition, standard CRM information (activity number, plan, type, stage, etc.) will be transferred to the Comments field in Notes

The following information will be transferred to Axapta from Lotus

Notes:

- Start date and start time
- End date and end time
- Purpose
- Location
- Participants
- Memo
- Priority
- Account
- Alarm
- Alarm time

Contact Person

- Online integration between select contact persons and the current user's local address book
- Update of changed contact person information from Lotus Notes to Axapta
- Possibility of specifying the server and database to be used for the integration of contact person information for each user
- No adjustment of the standard address book in Lotus Notes
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The integration kit transfers fields within the following areas:

- o Names (first name, middle name and last name)
- o Addresses
- o Phone number
- o E-mail and web addresses
- o Personal information: birthday, title, etc.

Development tools

The integration module contains a finished application for Axapta CRM, which makes it possible to use the system without having to do any programming.

However, the included developer resources (classes) enable the customer to develop further integration features between Axapta CRM and Lotus Notes.¹

Set up

The integration module can be installed in Axapta CRM version 2.5 SP3 market pack and later versions and in Axapta 3.0.

The module supports Lotus Notes version 4.5 or lighter version.

No adjustments in Lotus Notes are required.

The screenshot shows a dialog box titled "Employee option - Employee number: TG, Tina Gold". It has four tabs: "Overview", "General", "Outlook", and "Telephony". The "Outlook" tab is active. Under the "Outlook" section, there are several options and fields: "Enable Outlook synchronization" (checked), "Outlook user identification" (text box with "CN=Flemming Nielsen/O=Intoint"), "Time interval" (text box with "0"), "Last date" (text box with "12-12-2002"), "Last time" (text box with "11:34:51"), "Save attachments from sent e-mails" (checked), "Save copy of sent emails" (checked), and "Save e-mail links" (checked). Below the "Outlook" section is the "Lotus Notes" section, which includes: "Lotus Notes Server" (text box with "Local"), "Lotus Notes mail file" (text box with "mail\axapta.nsf"), "Contacts server" (text box with "Local"), and "Contacts database" (text box with "axnames.nsf").

¹ Limited to the e-mail, calendar and contact person systems in Lotus Notes.