

## PRODUCT SHEET

# GAIN CONTROL OF YOUR WEB VISITORS



An organization can realize substantial benefits by integrating the Web with a CRM solution. Managing customer and business partner data and being able to share it across the enterprise is a goal which is valid for most companies. Even so, many organizations experience that the visitors, or registered users on the Web site, are often stored in a separate database. The database is usually isolated and exported data quickly ages. It is also often difficult to import the data into other systems and applications. Registered visitors should instead be seen as an integrated part of the company's existing database, consisting of customers, suppliers, partners and members.

### EPiServer Connect for CRM

Connect for CRM is a module that integrates EPiServer CMS 5 with your organization's Microsoft Dynamics™ CRM solution. The focus of the connector is to ensure the integration of the registered users on your web site with the CRM solution and avoid the storage of the users in an isolated database.

EPiServer Connect for CRM has an embedded web registration wizard for your web sites extranet users. The wizard is designed to automate the process of capturing new users on the Web site and create new Accounts and Contacts in your CRM system. The Accounts and Contacts are created according to the predefined rules of the organization.

During the registration process a CRM look up is made to prevent duplicates. During the look-up, the e-mail address is verified for validity and the user is automatically given basic role- and access rights to secure information on your web site.

The access rights can also be managed manually at user level from the CRM system. With extranet users integrated into the CRM system, you automatically have the users available to the organization units that can benefit from accessing the contacts. The contacts can then be included in activities with the focus of generating future sales, further processing, marketing and communication.

### Self-service for managing personal data

The user's personal data from the registration process can be managed by the users themselves on the web site's "My Settings" page. All Personal data is stored on the contact in Microsoft Dynamics™ CRM and will be automatically updated with new information. Data is loaded from the CRM system when users access "My Setting"-page on the Web site. A built-in cache function ensures high performance.

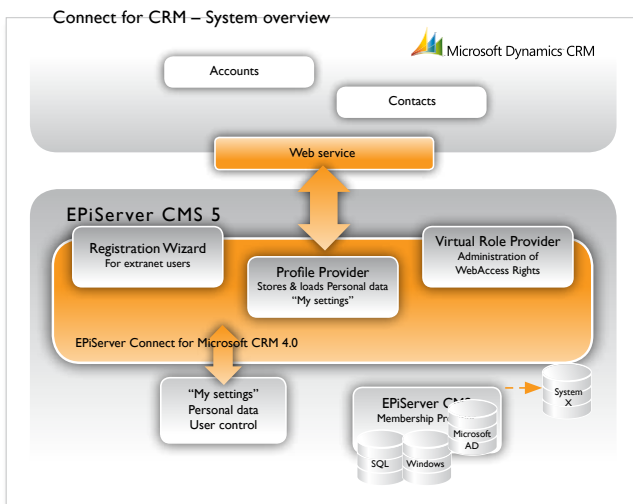
Personal data can be customized and extended to meet customer needs.

## Easy administration of users

With EPiServer Connect for CRM, you can administer user roles and access rights for your extranet users directly from the CRM system. You can supply contacts with high or low level user rights to parts of the Web site which require login and thereby provide them with access immediately. When the access rights are changed, the Web site is automatically updated to reflect those changes. EPiServer Connect for CRM can also be adapted to support the company's own access right groups.

## Complete security

To provide complete reliability, EPiServer connect for Microsoft Dynamics™ CRM has a standard fallback function which handles communication in the event of a failure between the Web and the Microsoft Dynamics™ CRM solution. The security setting ensures that personal data and roles are mirrored to the Web. The extranet users can still log in to the web site and access "My settings" page even if the CRM system is unavailable due to connection failure or maintenance.



# EPISERVER CONNECT

FOR CRM

## Key Features

- Web registration wizard that creates contacts and accounts in Microsoft Dynamics™ CRM
- CRM look up function to prevent duplicates.
- Automatic E-mail address verification
- Automatic role assignments at the point of registration
- View & change Web Access Rights by user in Microsoft Dynamics™ CRM
- Store the extranet users personal "My settings" data on the CRM Contact
- Fallback function which handles communication failure between the Web and CRM
- Customizable to customer needs

## System Requirements

- EPiServer CMS 5 R2 or later versions
- Microsoft CRM 4.0 Licenses (One additional user license for system/integration use is required)
- Microsoft CRM 4.0 Internet Connector (Read/Write version)
- Microsoft SQL 2005/2008

Configuration and customizations of Microsoft CRM 4.0 are required. Please contact your CRM supplier for more information. Implementation and customizations of the CRM connector are required on EPiServer CMS 5 to fit the customer needs. The Membership provider is not a part of this Connector. You can either use the built in Membership provider (SQL) in EPiServer CMS 5 or use some other external solution. Please contact your EPiServer partner for more information.

## About Microsoft Dynamics™ CRM 4.0

Microsoft Dynamics™ CRM 4.0 is a fully integrated customer relationship management (CRM) system. Microsoft Dynamics™ CRM gives you the capability to easily create and maintain a clear view of customers from first contact through purchase and post-sales. With tools to enhance your company's sales, marketing, and customer service processes, along with native Microsoft Office Outlook integration, Microsoft Dynamics™ CRM delivers a fast, flexible, and affordable solution. [www.microsoft.com/crm](http://www.microsoft.com/crm)

BEHIND EVERY GREAT WEB SITE ...

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**ABOUT EPISERVER** EPiServer is the leading supplier of solutions that enable true Web engagement and drive business results for end customers. More than 3,000 customers worldwide use EPiServer's technology platform that combines content, community, commerce, and communications with a configurable metrics dashboard. EPiServer CMS is the foundation for more than 9,700 websites and is used by more than 130,000 web editors daily. The EPiServer platform is delivered through an extensive network of over 450 partner companies in 30 countries. EPiServer combines the stability and support of a commercial product with EPiServer World, a thriving developer community of more than 11,000 developers. EPiServer is a Microsoft Gold Certified Partner with an AAA-ranking by Dun & Bradstreet since 2000. The company was founded in 1994 and has offices in the United States, Sweden, Denmark, Norway, Finland, The Netherlands, South Africa, Australia and the United Kingdom. For more information, please visit [www.epi-server.com](http://www.epi-server.com)

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