Harmoniser

Company, contact and quote integration for SuperOffice CRM and Microsoft Dynamics 365 Business Central

SuperOffice®

Microsoft Dynamics 365
Business Central

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What is Harmoniser?

Harmoniser is a unique integration developed by Synergy Technology between SuperOffice CRM and Microsoft Dynamics 365 Business Central.

This integration links records in SuperOffice and Business Central and keeps the data within them synced. It also allows users to create quotes and view financial data stored in Business Central from within SuperOffice CRM.

For SuperOffice Users

This allows SuperOffice CRM users to benefit from all the features of one of the most comprehensive enterprise resource planning (ERP) solutions on the market, including financial, operational and supply chain management.

For Business Central Users

This link allows Business Central users to benefit from the advanced sales forecasting, pipeline management, marketing and customer service features of a dedicated CRM platform like SuperOffice.
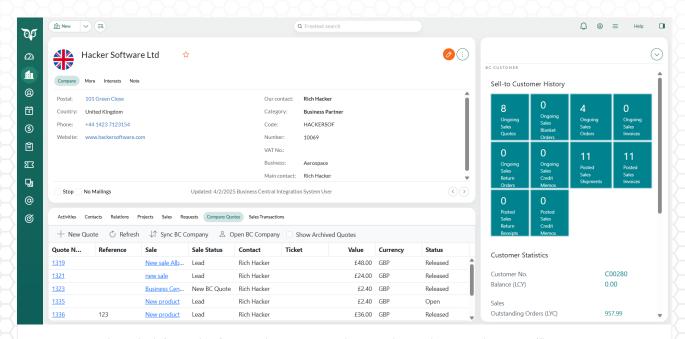
![Laptop, coffee mug and notepad on a wooden desk]

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How does it work?

There are two key areas in which the two systems are linked together, the company & contact sync and the quote & sale sync:

Company & Contact Data Sync

- Create a company and a person record in Business Central automatically from a company and contact in SuperOffice.

- Once created, these records will remain in sync, so that any changes made in one, are automatically reflected in the other.

- Users can specify which records are synced, meaning you can keep all your leads or prospects in SuperOffice, and only create them in Business Central, once they become a customer.

- Financial information from Business Central can be viewed on the company record in SuperOffice, such as total order value, credit limit etc, provided the records have been linked.
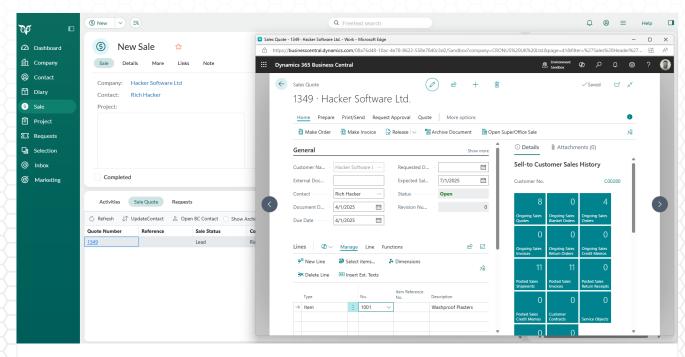

Financial information from Business Central displayed in the side panel in SuperOffice CRM.

Quote & Sale Data Sync

- Create, view or edit quotes in Business Central from within the SuperOffice company record or sale.

- Link the quote in Business Central to a sale in SuperOffice. This can be done from within SuperOffice or Business Central.

- Automatically sync the quote and sale, so that any changes made in one, are reflected in the other.

- Automatically add quotation and order documents created in Business Central to the SuperOffice sale the quote is linked to.

- View a history of sales by product SKU, product category, and customer with drill-down functionality.

- Access a live overview of sales with current and monthly views.

Business Central quote generated from a sale in SuperOffice

Experts by Your Side

You don't need to be an expert to get a fantastic solution up and running within your business, but you do need to hire the best support.

Consulting a systems integrator is a valuable step when considering the implementation of a software solution, especially for complex projects. Synergy Technology have over 25 years' experience in designing and implementing solutions for businesses of all sizes, so we are well placed to help and advise you throughout your software implementation journey.

Here are several reasons why you should consider working with Synergy Technology:

- **Expertise and Experience:** Synergy Technology has specialised knowledge and over 25 years of experience in designing, implementing, and managing complex IT solutions. We are well-versed in integrating different technologies to meet specific business needs.

- **Customisation and Tailoring:** Synergy Technology can help customise software solutions to fit your organisation's unique requirements. We can adapt existing software or integrate multiple solutions to create a seamless workflow.

- **End-to-End Solution Design:** We can design a comprehensive solution that addresses not only the software itself but also the hardware, network, security, and other components necessary for a complete and functional system.

- **Risk Mitigation:** We can help identify and mitigate potential risks associated with software implementation, such as compatibility issues, data migration challenges, and security concerns.

- **Project Management Expertise:** Synergy Technology have years of project management experience, and robust, proven systems to help plan, execute, and monitor the implementation process, ensuring that the project stays on track and within budget.

- **Integration Testing and Validation:** We perform rigorous testing to ensure that all components of the solution work together seamlessly and meet performance and reliability requirements.

- **Support and Maintenance:** Our application support service, SynergyCare, is designed around the clients and their individual users. Our consultants deliver a full range of tailored support coupled with exceptional responsiveness and accountability. By dealing with issues and queries quickly and efficiently, we will save you time and money, ensuring that your business applications run at optimal levels of performance at all times.

- **Scalability and Future-Proofing:** We can design solutions with scalability in mind, allowing for future growth and expansion without major disruptions or costly reconfigurations.

- **Compliance and Security Considerations:** We are knowledgeable about industry-specific compliance requirements and can help ensure that the implemented solution meets all necessary security and regulatory standards.

When engaging a systems integrator, it's important to clearly define your objectives, requirements, and expectations. Open communication and collaboration with the systems integrator are key to a successful implementation. Additionally, be sure to select a reputable and experienced systems integration partner with a proven track record of successful projects in your industry.

Why Choose Synergy Technology?

We seek a long-term partnership with our clients and work alongside them to help them get the best use of their solutions, to help attract, win and retain clients.

Since 1997, we have implemented hundreds of ERP and CRM solutions of differing complexity that have helped improve business performance by identifying opportunities for improvement and growth.

We have the scalability, knowledge and experience to offer the most relevant software solutions for your business needs and our highly responsive technical helpdesk works pro-actively to ensure any queries you have are resolved efficiently and effectively.

Give us a call today, and we can discuss how we can collaborate and share success together.

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