Harmoniser

Account, contact and quote integration for Microsoft Dynamics 365 Business Central and Dynamics 365 Sales

What is Harmoniser?

Harmoniser is a unique integration between Microsoft Dynamics 365 Business Central and Dynamics 365 Sales. This integration links records in Dynamics Sales and Business Central and keeps the data within them synced, unifying the data between them, eliminating data silos and creating "**one version of the truth**".

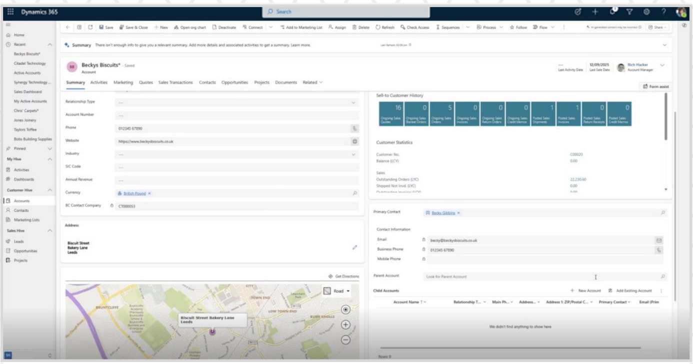
It also enables selected Dynamics Sales users to create quotes and view transactional data stored in Business Central from within the account record in Dynamics Sales. The Business Central Quote can then create or update a Dynamics Opportunity, and any relevant order documents can be linked to the Opportunity.

What Makes Harmoniser Different?

While other providers have attempted to integrate Dynamics Sales with Business Central, Harmoniser takes a unique approach. One of the biggest challenges in any integration is handling Business Central's complex pricing structures, such as price lists, price groups, discounts, and special customer pricing.

Many other solutions attempt to replicate this logic outside of Business Central, often leading to errors or inconsistencies. Harmoniser avoids this entirely by keeping all quoting activity within Business Central, but viewable and controllable from within Dynamics 365 Sales.

This ensures that every quote automatically obeys your existing pricing rules. This approach not only maintains data integrity but also reduces duplication, saves time, and gives your teams full confidence that every quote is accurate and aligned with your pricing strategy.



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

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Core Functionality

Harmoniser is built around five key pillars of functionality:

1. Contact & Account Synchronisation

- Create Business Central Account and Contact records directly from Dynamics.
- Maintain a live sync of contacts and companies that originate in Dynamics.
- Selective syncing means you can choose which records are pushed from Dynamics Sales to Business Central.
- This means you can choose to keep all your prospects in Dynamics, only creating them in Business Central once they become customers.

2. Quote Management

- Create and edit Business Central Quotes from within Dynamics Sales using a custom web panel.
- Display relevant quote data on Account, Contact, and Opportunity cards.
- Link Business Central Quotes to Dynamics Opportunities automatically.
- Automatically archive released quotes and link them to Dynamics for full traceability.

3. Sales Data Enrichment

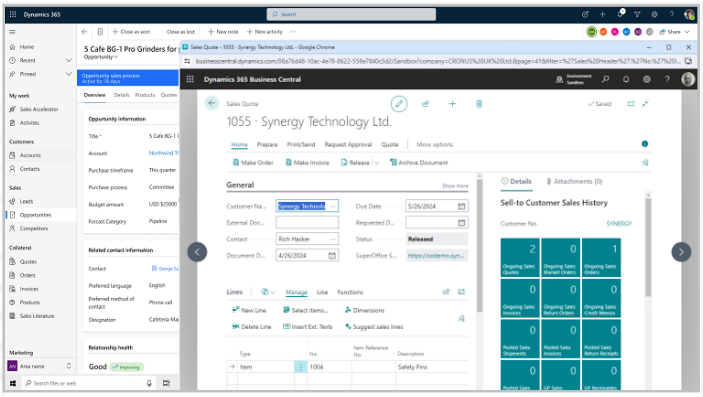
- Display key transactional information about the selected customer in Dynamics from Business Central (e.g. Total Order Value, Credit Limit).
- If a contact is not linked to a Business Central customer, the panel will display basic activity stats (like the number of quotes).

4. Automatic Opportunity Updates

- When a quote is released in Business Central, all relevant Dynamics Opportunity fields are updated (value, status, currency, order number, etc.).
- Quote status is reflected in SuperOffice (Open, Sold, or Lost).
- Archived quotes and order documents are saved against the corresponding Dynamics Opportunity, Contact, and Account.

5. Follow-Up Automation

- Follow-up appointments are automatically created in SuperOffice when Business Central quotes are released.
- Lead time, appointment type, duration, and description are all fully configurable by administrators.



Business Central quote generated from an opportunity in Dynamics 365 Sales

Who are Synergy Technology ?

Synergy Technology is a Certified Microsoft Small and Midsize Business Management Application Specialist. Our 20+ years of expertise implementing, supporting, and customising both systems, means Synergy Technology are able to deliver a smart, efficient, and reliable integration between the two.

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