



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

What is Harmoniser?

Harmoniser is a unique integration between Microsoft Dynamics 365 Business Central and SuperOffice CRM. This integration links records in SuperOffice 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 SuperOffice users to create quotes and view transactional data stored in Business Central from within the company record in SuperOffice. The Business Central Quote can then create or update a SuperOffice sale, and any relevant order documents can be linked to the sale.

What Makes Harmoniser Different?

While other providers have attempted to integrate SuperOffice CRM 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 SuperOffice.

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.

The screenshot shows the SuperOffice CRM interface for a company record. The main panel displays details for 'Hacker Software Ltd', including contact information and a list of quotes. The side panel, titled 'Sell to Customer History', shows a summary of sales and orders. Below this, the 'Customer Statistics' section displays financial data from Business Central.

Quote No.	Reference	Sale	Sale Status	Contact	Ticket	Value	Currency	Status
1329		New sale, All...	Lead	Rich Hacker		148.00	GBP	Released
1332		New sale	Lead	Rich Hacker		274.00	GBP	Released
1332		Business Cen...	New BC Quote	Rich Hacker		27.40	GBP	Released
1335		New product	Lead	Rich Hacker		27.40	GBP	Open
1336	123	New product	Lead	Rich Hacker		136.00	GBP	Released

Customer Statistics

Customer No.	C00280
Balance (BCT)	0.00
Sales	
Outstanding Orders (BCT)	957.99

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

Core Functionality

Harmoniser is built around five key pillars of functionality:

1. Contact & Company Synchronisation

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

2. Quote Management

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

3. Sales Data Enrichment

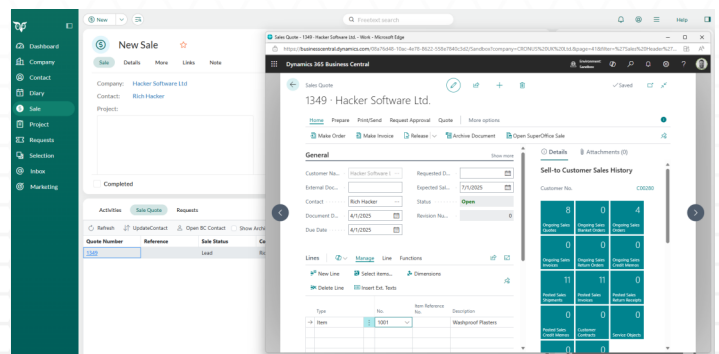
- Display key transactional information about the selected customer in SuperOffice from Business Central (e.g. Total Order Value, Credit Limit).
- If a contact is not linked to a Business Central Customer, the panel will display basic activity stats (like the number of quotes).

4. Automatic SuperOffice Sale Updates

- When a quote is released in Business Central, all relevant SuperOffice sale 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 SuperOffice Sale, Contact, and Company.

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 a sale in SuperOffice

Who are Synergy Technology ?

Synergy Technology is a Microsoft Small and Midsize Business Management Application Specialist, as well as the UK's Leading SuperOffice partner. 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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