Extending Dynamics CRM with BPM processes using PNMsoft's Sequence Kinetics™

Sequence Kinetics BPM Suite for Dynamics CRM

Sequence Kinetics for Microsoft Dynamics CRM is a Intelligent BPMS (Business Process Management Suite) which enables organisations to automate, control and mobilise their business processes that are linked to Dynamics CRM. Using _HotChange_™ _technology_, Sequence Kinetics enables users that are not using Dynamics CRM to participate in processes while integrating external data and systems. Sequence Kinetics extends Dynamics CRM to mission critical processes on premises and in the cloud.

Sequence Kinetics™: Intelligent, Mobile, Dynamic

- Intelligent Business Process Management Suite (iBPMS).

- Powered by PNMsoft's unique *HotChange™* technology.

- Rapid build and change of high availability workflows.

- Intensive human collaboration.

- Development lifecycle governance.

- Extends Microsoft platforms like SharePoint, Dynamics and Azure.

- Integrates with popular ERP/CRM products.

- Unparalleled mobile capabilities – write once run everywhere.

- Based on .NET, leverages existing development skills into BPM expertise.

- Answers business need for high frequency of process change AND IT need for a well-controlled process development environment.

Where Sequence Kinetics is relevant for Dynamics CRM?
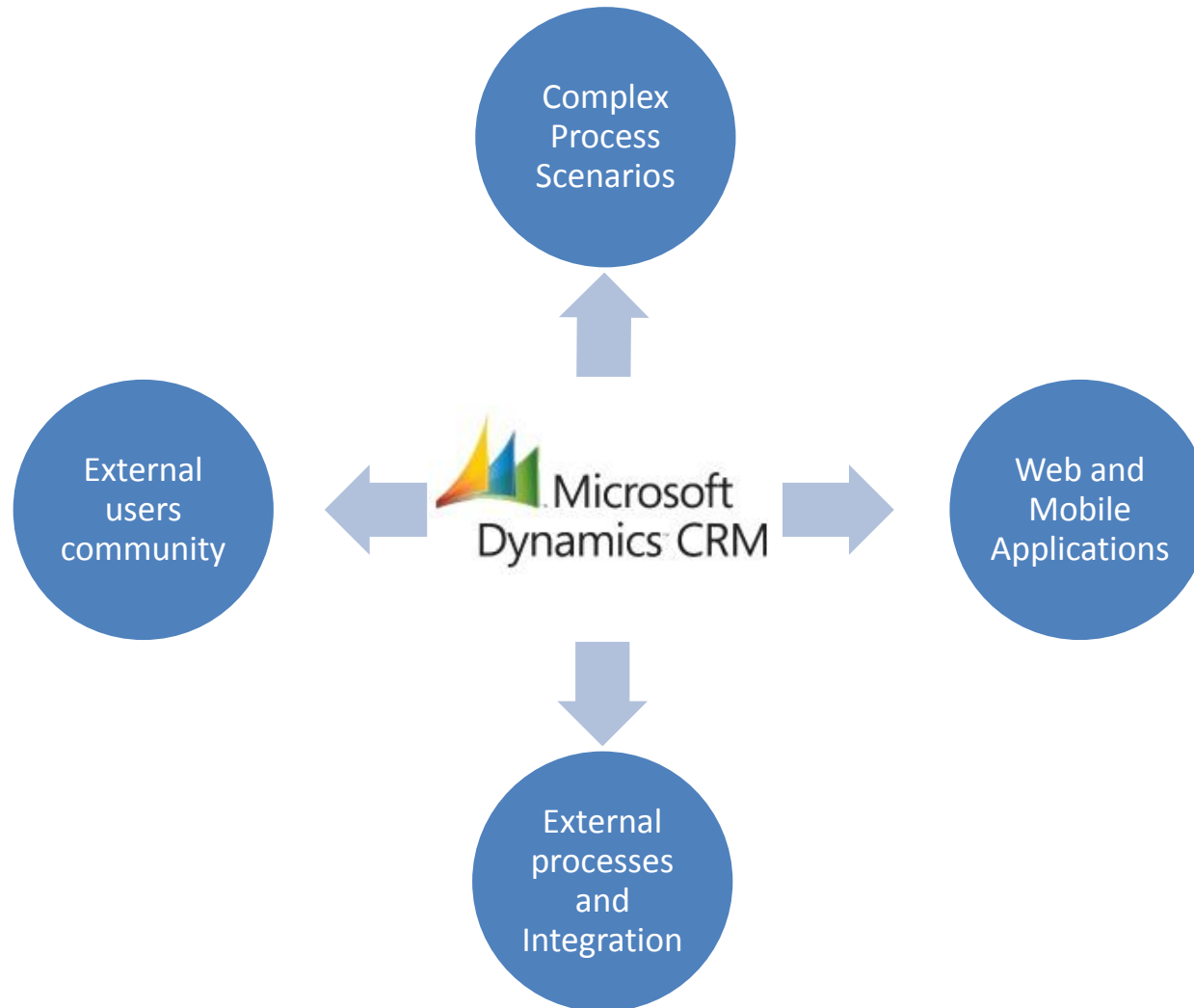
Solution Examples Sequence Kinetics for Dynamics CRM

Monitoring, Optimisation and Dashboards

Dynamics CRM

| Service Catalogue	Service/Product Request	Work allocation	Customer Feedback	Installation Management	Customer On Boarding

Sequence Kinetics BPM & Workflow

ERP

Back office systems

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Sequence Kinetics CRM Dynamics Solution Includes:

➢ A powerful workflow engine with out of the box integration to MS Dynamics CRM

➢ Cloud enabled, easy to use process design environment supporting various business scenarios including integration to LOB systems

➢ Advanced task routing, business rule engine, and complex flow execution engine.

➢ The ability to create, retrieve and update Dynamics CRM entities allowing the end-users to complete their work in Dynamics CRM

➢ The ability to listen to CRM events and resume or action business process accordingly

➢ Rich Form designer for easy creation of Web and Mobile Forms with CRM data

➢ A Mobile portal and Self-service portal.

➢ Collaborative environment to optimise work and team communication

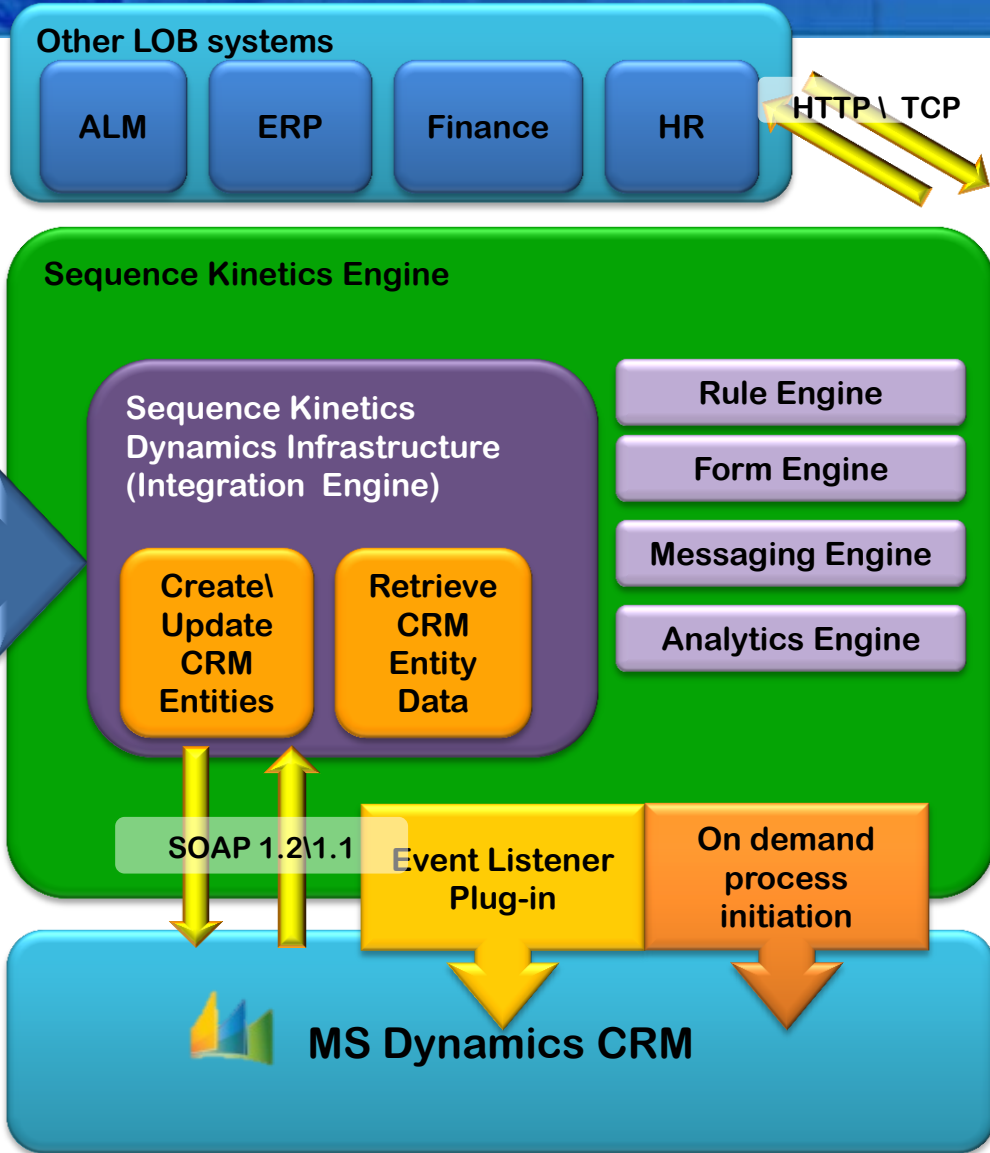➢ Rich monitoring (real-time dashboards) and process optimisation tools for process improvement.

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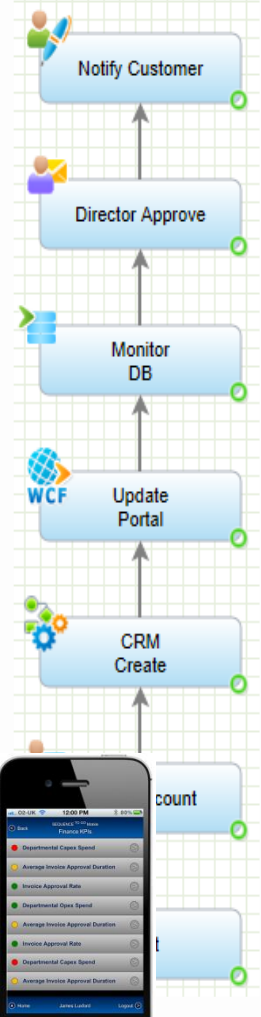
CRM Integration Architecture

CRM Integration is a *HotChange^TM* feature!
Click here to learn more.

HotChange

Other LOB systems
- ALM
- ERP
- Finance
- HR

HTTP \ TCP

Flowtime & Mobile portal
- Dashboards
- Collaboration
- .Net Forms
- Work delegation

Sequence Kinetics Engine

Sequence Kinetics Dynamics Infrastructure (Integration Engine)
- Create\ Update CRM Entities
- Retrieve CRM Entity Data

- Rule Engine
- Form Engine
- Messaging Engine
- Analytics Engine

SOAP 1.2\1.1

Event Listener Plug-in

On demand process initiation

MS Dynamics CRM

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What functionality does Sequence Kinetics add to Dynamics CRM?

Let's take a tour and find out…

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Sequence Kinetics enables you to quickly construct complex processes including both human and system activities

Sequence Kinetics includes the following wizard-based CRM connectors:

Start

CRM Listener — Kicks off or resumes a process when a change occurs in a CRM entity

Process Actions

CRM Update — Creates or updates a CRM entity with Process Data

CRM Execute — Executes a CRM function

End — Process end point
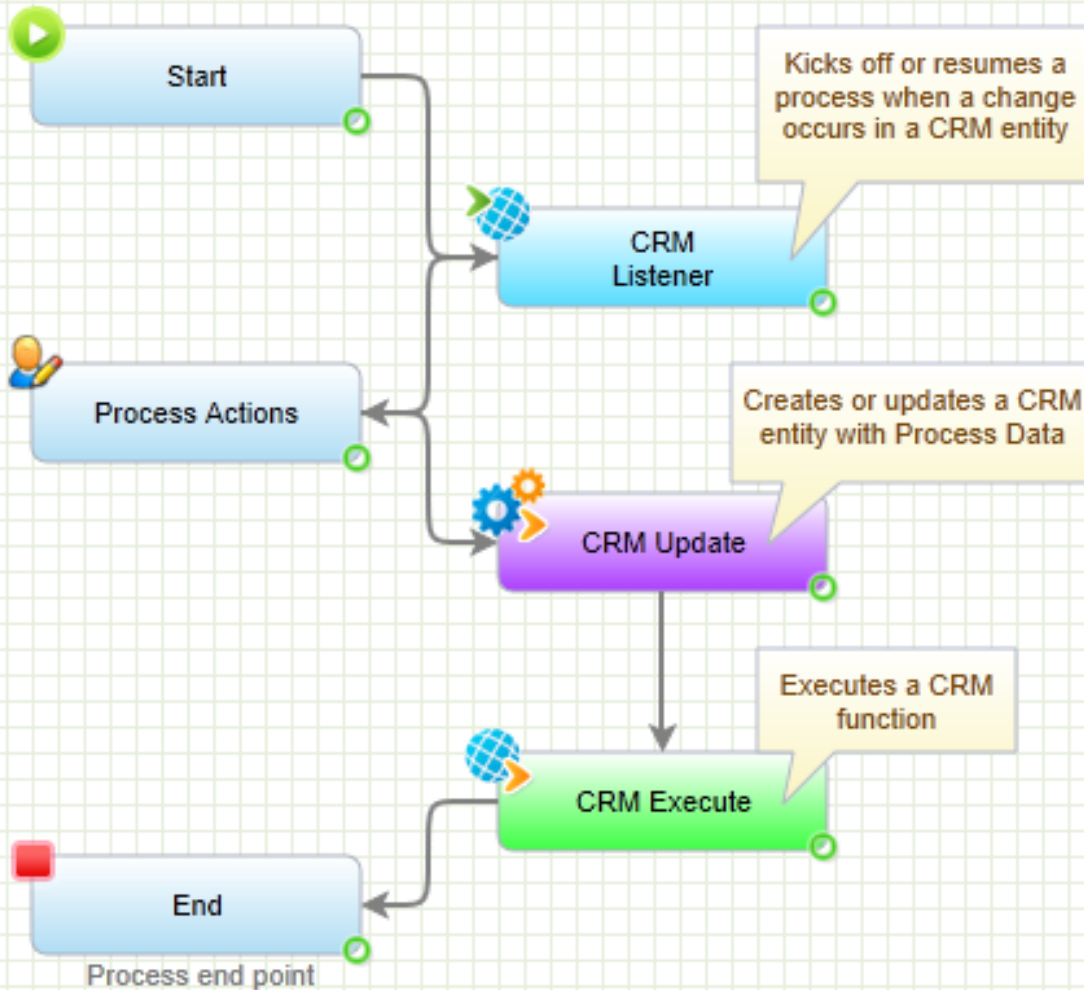
Sequence Kinetics communicates with Dynamics via Web Services.

Sequence Kinetics activities support custom CRM entities.

Sequence Kinetics supports CRM on premise and CRM Online.

Sequence Kinetics enables you to define CRM connection strings (within activities or centrally)

Sequence Kinetics provides the ability to action requests on the CRM server e.g. assign, share.

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Sequence Kinetics Enables Control Over Multiple ERP/CRMs

Sequence Kinetics can be deployed as agile layer across multiple ERP/CRM systems with embedded business rules and logic. Sequence Kinetics leverages ERP/CRM data and enables you to automate manual processes and ensure data consistency and visibility. Sequence Kinetics integrates with industry-standard ERP/CRM systems such as Microsoft Dynamics CRM, AX, NAV, and GP,

providing users with familiar Microsoft tools to initiate and control processes.
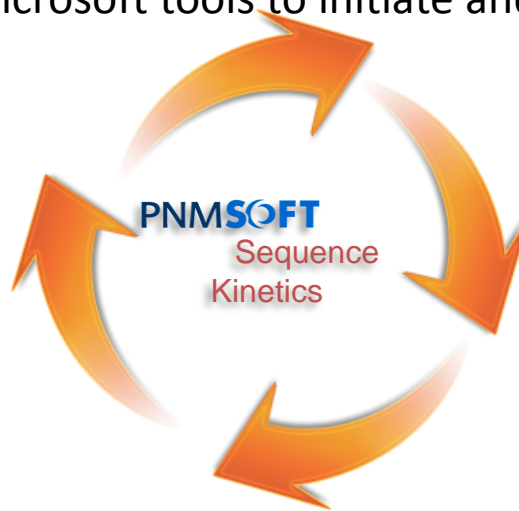
Sequence Kinetics Architecture for Multiple ERP/CRMs Systems
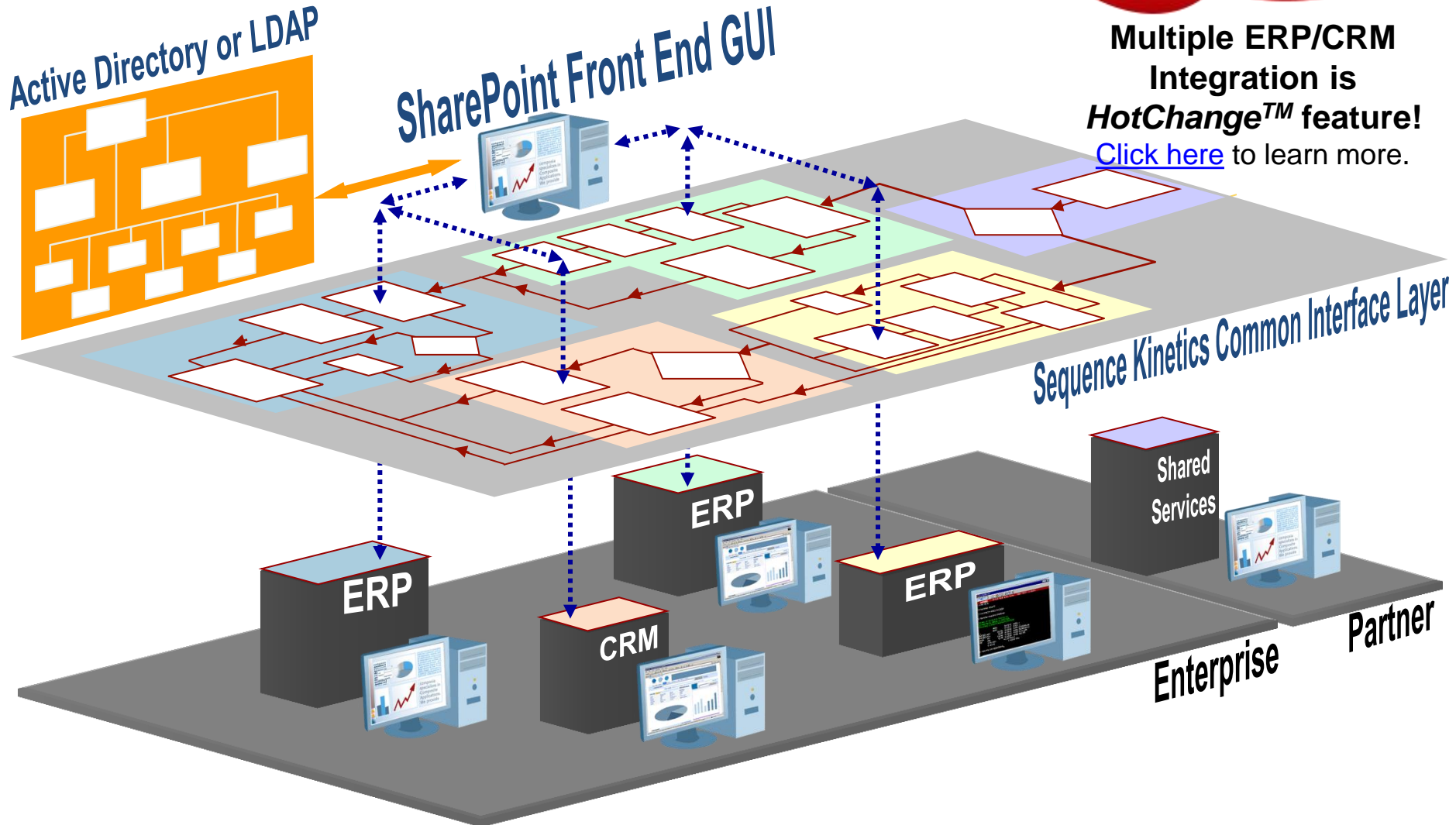
Example:
Customer Service Process

Sequence Kinetics SharePoint Flowtime

End-to-End Business Processes

Client opens a service ticket → Completes the ticket eform → Sequence Kinetics launches the CRM Service Process and waits for its completion → Approved? → Sequence Kinetics updates CRM

Non Core Users

The latest account details for this user are retrieved from the CRM and displayed as part of the form

Sequence Kinetics MI

Dynamics CRM

Core Service Processes

Appropriate details of the service job are passed back to the CRM.

Core Users

CRM DATA

CRM MI

| Service | Sales | Marketing | Others |

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Case Study: GeRAP – IT Services Provider for Portuguese Government

GeRAP used Sequence Kinetics to deploy its Finance and HR processes across the Portuguese public sector to save money, improve user experience, and boost productivity.

The Business Requirements

The need for standardized processes across the Public Administration.

The need to create a Shared Service for HR and Finance with tight integration with existing ERP, CRM and a SharePoint Flowtime interface.

The Solution

A Sequence Kinetics process layer over the ERP and CRM platforms with integration from its web-based Forms directly to the ERP and CRM.

An environment for process designers and business experts to deliver hundreds of processes that reach all public sector employees via a SharePoint front end.
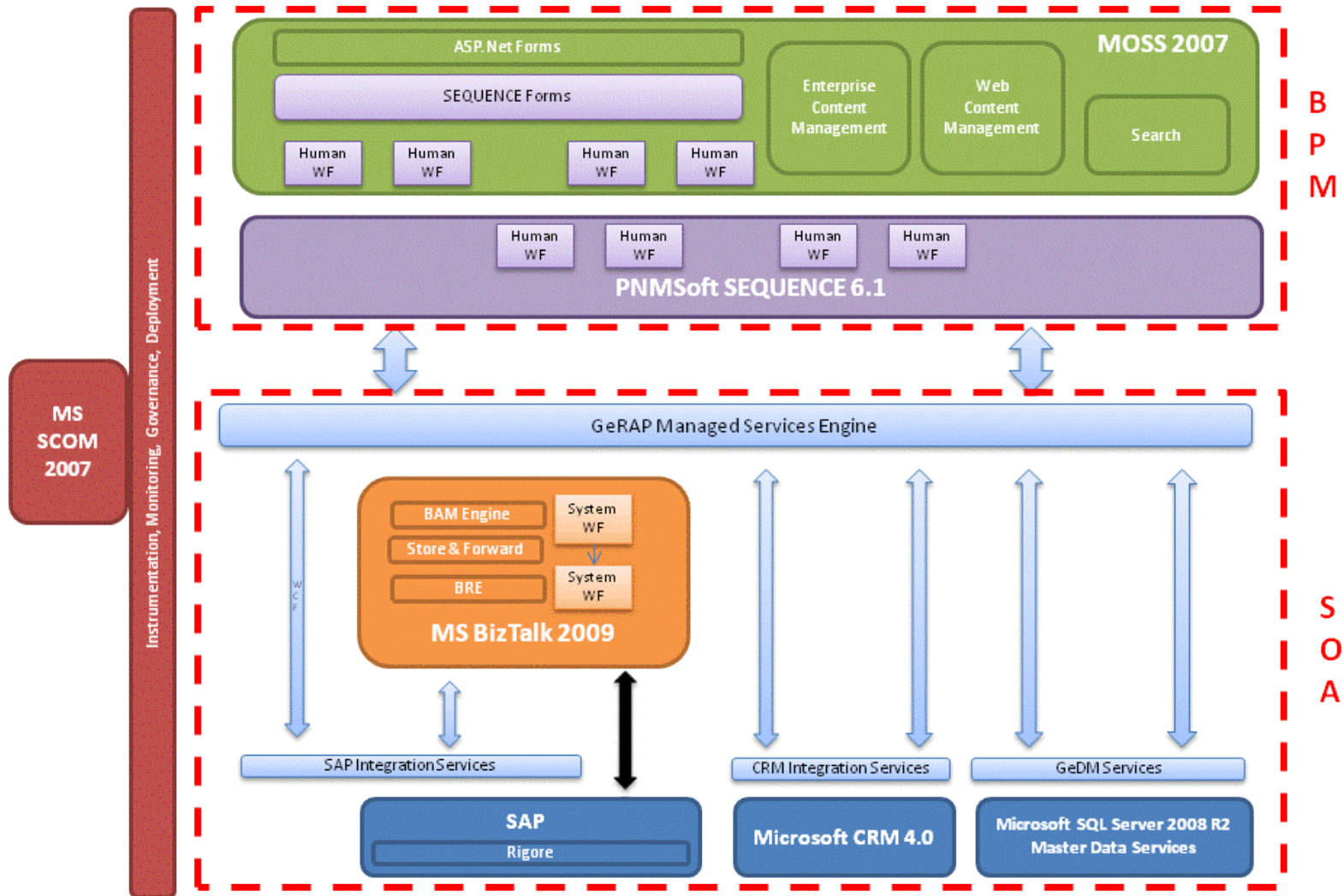
The Business Benefits

Solution has reduced the requirement for end user training and accelerated adoption.

TCO has gone done by 80%.

Time to delivery has gone down by 70%.

GeRFiP
GESTÃO DE RECURSOS
FINANCEIROS PARTILHADA

GeRHuP
GESTÃO DE RECURSOS HUMANOS
PARTILHADA

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GeRAP Case Study: Solution Architecture

Case Study: Utilities Provider

Background:

A utilities provider is using Dynamics CRM to manage customer support and service fulfillment. Each customer call must be assigned to the correct service agent who can handle the work request within the company. There was a requirement for a Workflow product well integrated into CRM that can handle the work allocation and task management.

Solution:

The company selected PNMsoft's Sequence Kinetics to integrate with Dynamics CRM. When a new work entity is created, a Sequence Kinetics process is initiated which determines which service agent is the most suitable and available to handle the request. The agent is chosen based on individual skill set, shift, and time left in the day. Once selected, Sequence Kinetics automatically updates the CRM entity with the correct assignment and the agent is notified in their inbox. Sequence Kinetics communicates with Dynamics CRM using the inbuilt adapter.

Benefits:

➢ The company can optimise workforce and manage KPI's.

➢ Work items are completed faster.

➢ Improved customer service.

➢ Automatic assignment saves time and errors.

➢ CRM capabilities are maximised.

Case Study: Industrial Consultancy

Background:

An industrial consulting corporation is using Dynamics CRM to manage processes which determine how it will pursue new opportunities. Dynamics alone did not provide the ability to execute such processes and conduct the necessary risk analysis.

Solution:

The corporation has integrated Sequence Kinetics with Dynamics CRM. Sequence Kinetics retrieves the opportunity data from Dynamics and populates a Sequence Kinetics form which is routed to the appropriate employee for further analysis. The employee adds data to the form's customised fields and Sequence Kinetics ensures that it is routed to his manager until the analysis is complete. Sequence Kinetics also enables the company to execute a risk management process surrounding the opportunity, and all the results are updated in Dynamics CRM.

Benefits:
- Enhanced data capturing capabilities
- Process-driven work ensures prospects are managed in an optimised manner.
- Risk management is standardised.
- Automatic routing saves time and errors.
- CRM capabilities are maximised.

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Benefits of using Sequence Kinetics with Dynamics CRM

➢ Enable Dynamics entities and users to initiate business processes, and achieve advanced process tracking, social BPM features, monitoring and delegation.

➢ Extend CRM functionality to external users (employees, suppliers, customers).

➢ Support for flexible and complex process scenarios (Customer on boarding, Work allocation, etc.).

➢ Integration of systems that are part of the process (ERP, Engineering, Helpdesk, etc.)

➢ Mobile usage as part of a CRM process.

➢ Extended functionality as part of a CRM deployment.

About PNMsoft

❑ Global company, offices and partners network worldwide

❑ Sequence Kinetics: leading Intelligent BPM Suite with tight integration to Dynamics, mobile capabilities and unique *HotChange*™ technology

❑ Provider of Vertical and Horizontal BPM solutions

❑ Microsoft partner for Business Applications

❑ Microsoft BPM & SOA Partner of the year finalist

❑ Gartner BPM "Cool Vendor"

❑ IDC Major BPM Player 2011

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