Microsoft Dynamics 365 Sales – Workday Financials Opportunity-to-Contract Process Template

Introduction

Improve the speed and accuracy of creating your Contract with Jitterbit's Microsoft Dynamics 365 Sales and Workday Financials Opportunity-to-Contract Process Template. A packaged solution of pre-built integrations connects data and processes between applications right out of the box, significantly reducing integration efforts. Synchronize fields such as Account, Customer, Contact, Opportunity, and Contract items between systems. Automatically create a Contract once an opportunity closes. Connect your CRM and ERP systems quickly and easily with reusable integrations that speed implementation and streamline business processes.

This process template includes pre-built integrations that connect the following objects and fields between Microsoft Dynamics 365 Sales and Workday:

Account → Customer

Account creation/update in Microsoft Dynamics 365 Sales will create/update Workday Customer

Contact → Contact

Contact creation/update in Microsoft Dynamics 365 Sales will create/update Workday

Product ← Sales Item

Creation or updates of Sales Items in Workday will create or update Products & Pricing in MS Dynamics

Won Opportunity → Opportunity

Change in Opportunity to Won in Microsoft Dynamics 365 Sales triggers Creation of a Workday Opportunity

Won Opportunity → Contract

Change in Opportunity from Won in Microsoft Dynamics 365 Sales triggers Creation of a Workday Contract

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BUSINESS PROBLEMS SOLVED:

- Automatically create a Contract in Workday Financials when an opportunity closes in Microsoft Dynamics 365 Sales
- Synchronize data and processes quickly and easily between systems

PROCESS TEMPLATE PACKAGE:

- Two endpoints: Microsoft Dynamics 365 Sales, Workday
- Four pre-built integrations
- Implementation and post-implementation delivery services (optional)

VALUE TO CUSTOMERS:

1. Easy setup for customer's integration projects (days, not weeks or months)
2. Mitigate risk by automating the contract process and having a single source of truth
3. Sync objects such as Account, Contact, Opportunity, Product, Contract in Salesforce with equivalent objects in Workday Financials
4. 50-80% faster time-to-value with a pre-packaged Opportunity-to-Contract process template
5. Standard objects are used for this process template to minimize additional customization

BUSINESS BENEFITS:

- Improved customer experience providing faster and more accurate orders, while reducing operational costs
- Quickly implement Opportunity-to-Contract integration between Microsoft Dynamics 365 Sales and Workday Financials for fast time to value
- Pre-packaged synchronization between Microsoft Dynamics 365 Sales and Workday Financials
- Enable teams to focus on business opportunities, and provide the correct contract renewals, discounts, and modifications

The *API Lifecycle* of a Customer

CX 360

- LEADS / OPPORTUNITIES
- ORDERS
- COMMERCE
- FULFILLMENT
- INVOICE
- PAYMENTS
- SERVICE & SUPPORT
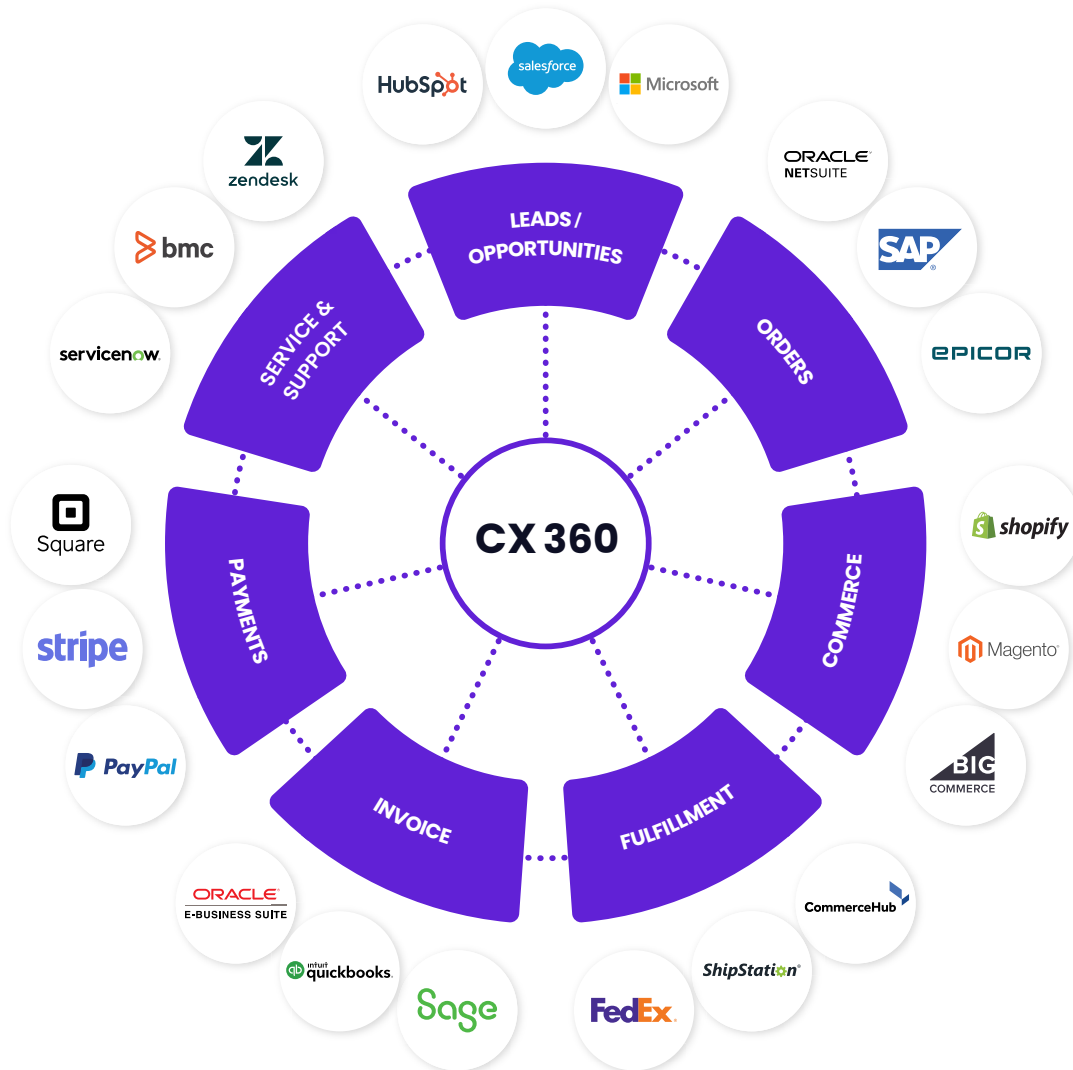
Opportunity-to-Order

When sales opportunities close, orders need to be processed as efficiently and quickly as possible, with 100% accuracy. Providing a seamless customer order experience requires integrating data and processes across multiple systems – when sales opportunities close in your CRM system, Contracts are automatically created in your ERP system. With Jitterbit's Microsoft Dynamics 365 Sales-Workday Financials Opportunity-to-Contract Process Template, you can use pre-built integrations to jumpstart integrations in your order lifecycle, reduce the time required to connect and automate your systems, and accelerate your time to market.

✦ Jitterbit

Jitterbit empowers businesses to optimize their connectivity and scalability through a single integration and workflow automation platform. Our mission is to turn complexity into simplicity so your entire organization can work faster and more efficiently.

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