

Epicor-Dynamics 365 Opportunity-to-Order Process Template



Business Problems Solved:

- Automatically create a sales order in Epicor when an opportunity closes in Dynamics CRM
- Connect and synchronize data and processes quickly and easily between systems

Package

- Two endpoints: Epicor ERP, Microsoft Dynamics CRM
- Four pre-built integrations
- Implementation and post-implementation delivery services (optional)

Value to Customers:

1. Packaged solution speeds integration and reduces technical support requirements
2. Standard objects minimize the need for additional customization
3. Pre-built workflows automate data synchronization between common objects such as Account, Customer, Contact, Part, and Product
4. Integrated processes eliminate manual data entry, data exports, costly delays

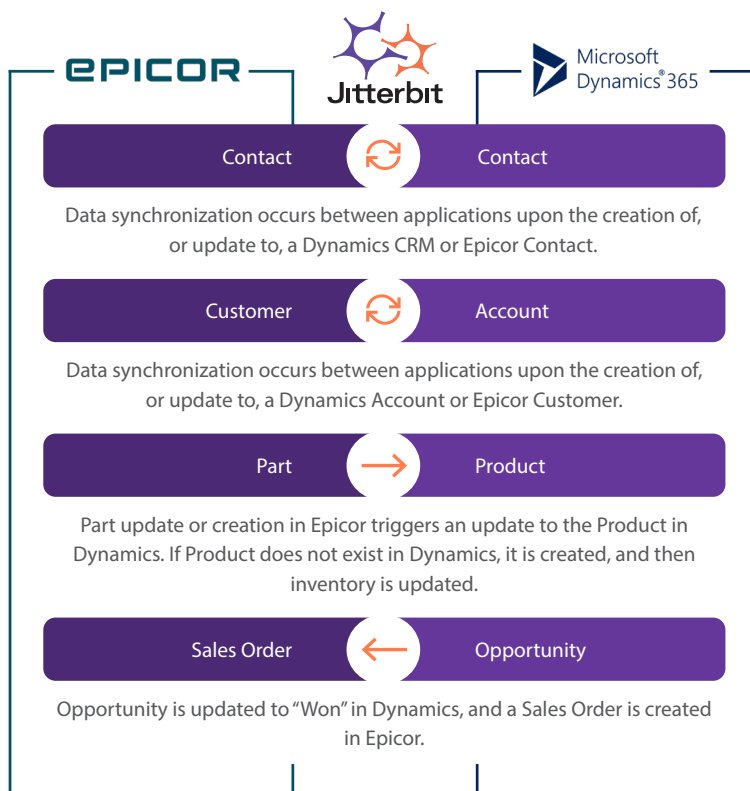
Business Outcomes:

- **Drive greater efficiencies** in sales order creation with a pre-built template that reduces custom coding and speeds automatic connections to commonly used objects, fields, and processes
- **Transform operations** with streamlined communications and data integration across the sales order creation process
- **Meet rising customer expectations** for seamless sales order management with quick, cost-effective integration that synchronizes data and processes between workflows

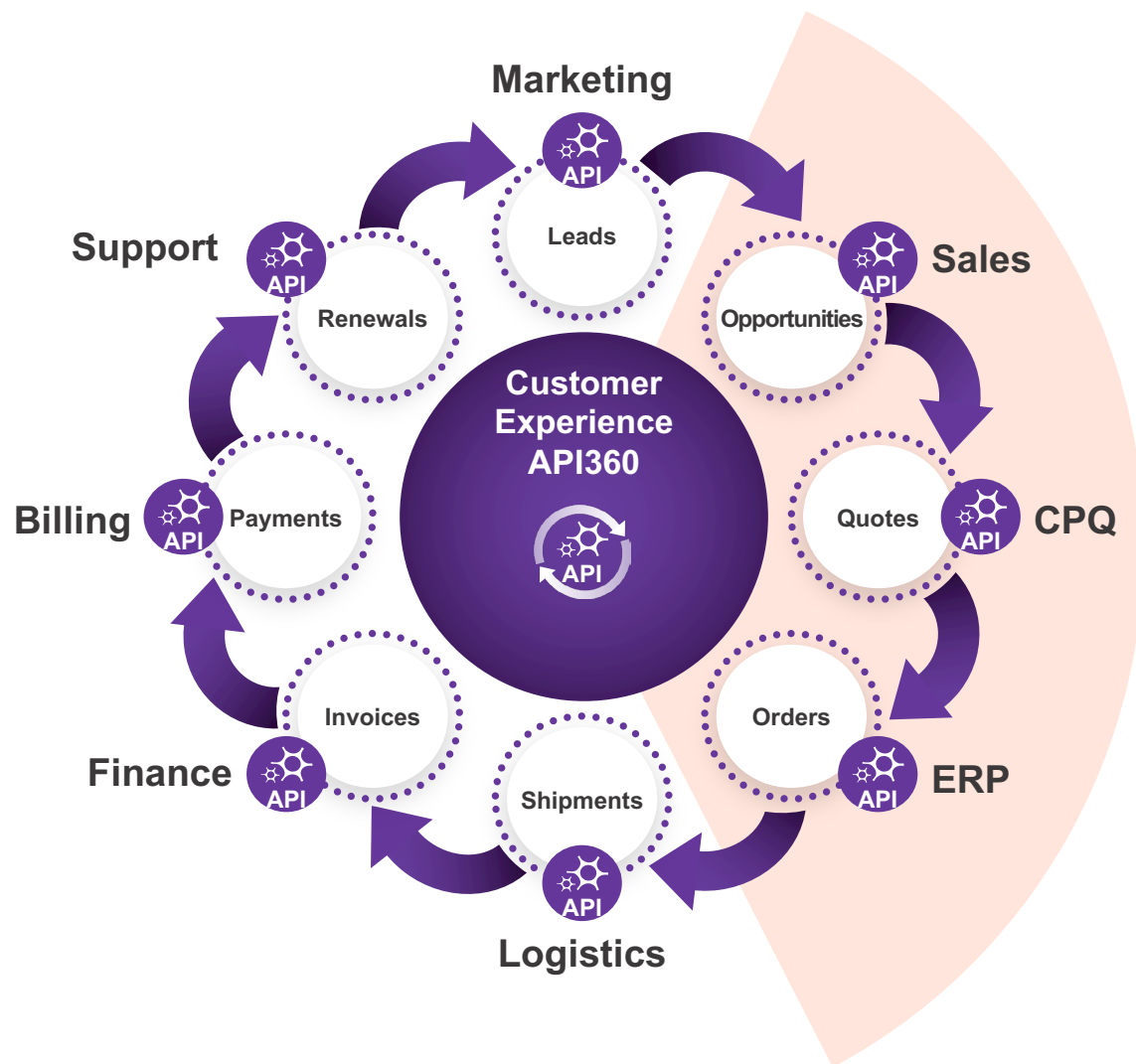
Introduction

Improve the speed and accuracy of creating your sales orders with Jitterbit's Epicor ERP & Dynamics CRM Opportunity-to-Order 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 Contact, Account, Customer, Product, and Parts between systems. Automatically create a sales order once an opportunity closes. Connect your ERP and CRM 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 Epicor ERP and Dynamics CRM:



The *API Lifecycle* of a Customer



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, sales orders are automatically created in your ERP system. With Jitterbit's Epicor ERP-Microsoft Dynamics CRM Opportunity-to-Order Process Template, you can use pre-built integrations to jumpstart integrations in your order lifecycle.



About Jitterbit

Jitterbit, the API transformation company, makes it quicker and easier for businesses to utilize data from any source, empowering them to rapidly innovate and make faster, more effective decisions. The Jitterbit API integration platform enables companies to quickly connect SaaS, on-premises, and cloud applications and instantly infuse intelligence into any business process.

To learn more, visit jitterbit.com or call 1-877-852-3500. You can also follow us on [Twitter](#) or read our [blog](#).