

ERP connect



CAS ^{globe icon} genesisWorld

ERP



View ERP data

In your CRM system

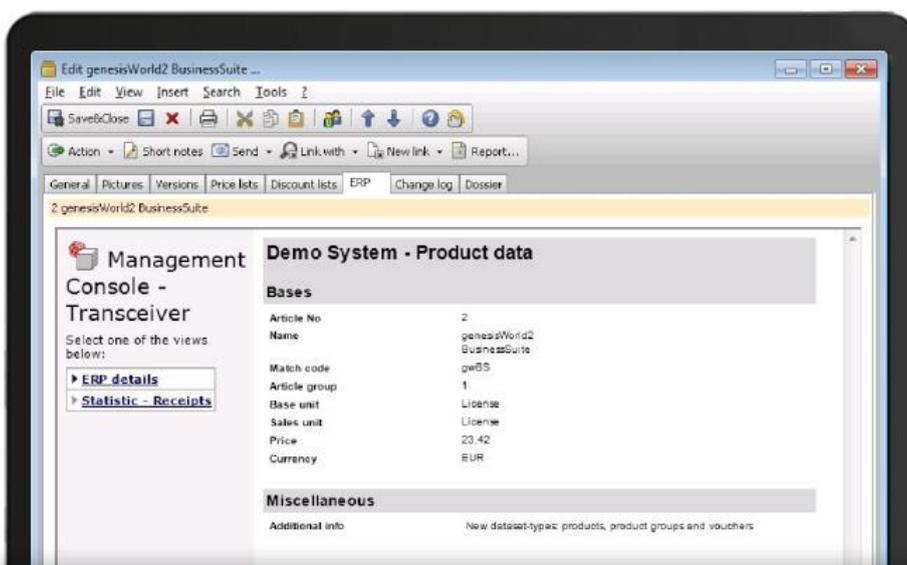
ERP connect integrates enterprise resource planning (ERP) into central customer and information management. Information on documents, appointments, tasks and so on is obtained from CAS genesisWorld, whereas information on receipts, job vacancies, purchases, supplier problems and so on comes from the ERP system. In order to see all information, data is synchronized between these systems. CAS genesisWorld partners have created connections for a number of ERP systems. A CAS genesisWorld partner is usually also responsible for setting up the connection.

In the Management Console, the administrator or an authorized user can create and implement synchronization tasks between the ERP system and CAS genesisWorld. Receipt, product and product group data is recorded in the ERP system and this data is then transferred to CAS genesisWorld through the synchronization tasks. Data for addresses and projects can be entered and changed in both the ERP system and in CAS genesisWorld. Synchronization tasks ensure that the data in both systems is kept synchronous.

CAS genesisWorld

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- Enables you to synchronize data between the ERP and CRM systems
- Allows you to record product groups and synchronize them with CAS genesisWorld



Using ERP connect you can see all the ERP data in your CRM.

Advantages

- Product folders are displayed as HTML pages
- CRM and ERP data are all stored centrally in the customer dossier
- Automatic address synchronization between data in the ERP system and CAS genesisWorld
- The CAS genesisWorld rights system offers the highest levels of data security



- CAS genesisWorld also includes the new data record types, for example, products, product groups and receipts.
- You can define settings individually for each of these new data record types.
- The ERP tab in addresses is new and allows you to analyze products and receipts as well as view additional information from the ERP system. This information is displayed as HTML pages.
- Products and product groups can be displayed as HTML pages in so-called catalogs with selected identifiers and charts. You can export catalogs so that they can be used by other users or applications.

Find out more

Would you like to know more about ERP connect?

