Dynamics CRM Connector for eCopy™ ShareScan®

The Microsoft Dynamics CRM Connector for eCopy™ ShareScan® lets you attach scanned paper documents directly into you CRM business entities.

Scan paper documents and attach them to your accounts, contracts, leads or any of the other eight available business entities supported by the Microsoft Dynamics CRM Connector.

CONVYX
Integrating matters.

Dynamics CRM Connector for eCopy™ ShareScan®

Authenticate in real-time using your Active Directory credentials

Choose which type of business entity you wish to scan to or preselect a business entity in the admin console, removing the need for this step alltogether.

Find the correct entity with type-ahead search and categorize the document utilizing the Title, Description and Filename fields from Dynamics CRM.
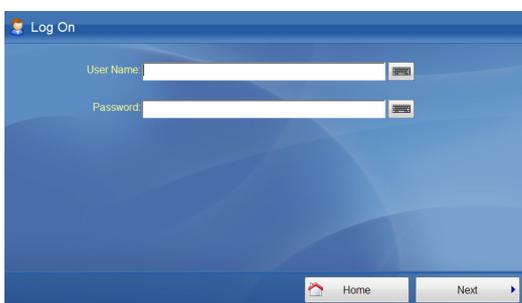
Ease of Use and Flexibility

You can choose your business entity type from a list at the MFP. Restrict available business entity types or create express buttons that scan directly to a pre-selected business entity type. You can even specify a default file name to be used with your attachments. Dynamics CRM attachment's Title and Description fields are available for further document classification. Type-ahead functionality when searching for entities in CRM minimizes time required typing at the MFP.
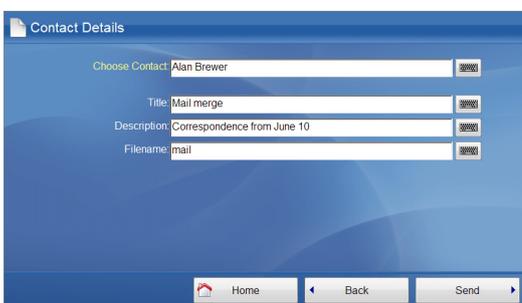
Real-time Native Integration

Utilizing the Microsoft Dynamics CRM Web Services API, communication between your MFP and Dynamics CRM takes place in real-time. This enables scanning to business entities the second they are added to Dynamics CRM. Because all the communication is based on Web Services no installation is required on the Dynamics CRM server.

Security

Enable runtime authentication and have users authenticate against Active Directory before they scan, creating a complete audit trail right into Dynamics CRM. An administrator also have the option to specify credentials in the connector settings, removing the authentication altogether, to enable faster interaction at the MFP. Authentication is compatible with eCopy™ ShareScan's Session Logon functionality.

COMPATIBILITY

Microsoft Dynamics CRM 4.0 Onsite installations	eCopy™ ShareScan® v5 or later	All OS:es and devices supported by ShareScan®

CONNYX

Integrating matters.