

4.4 - Salesforce => DynaSys

Objective

The objective of this interface is to integrate CRM information ([SalesForce.com](https://www.salesforce.com) (SFDC)) in DynaSys Demand Planning.

Opportunities and Quotes are interfaced from the CRM.

- Opportunities

The Opportunities interface allows to get a sales forecast visibility on customers which are not currently active in SAP.

These customers are the Prospects only managed in SFDC. We only import Prospect for which Opportunities are registered in SFDC : new DFUs are created in DynaSys.

In and are materialized in SFDC as 'Opportunities' (which stock the information of Product & Customer info).

Prospects naming: In DynaSys DP, we call them prospects or prospects Ship-to or CRM Ship-tos, their codes are typically starting with 011p...

Import / Source: Opportunities are sent from SFDC to DynaSys through a csv file: DYS_SF_CRM.csv.

Export: from DP, the CRM DFUs are also exported to BW Reports (Budget Review, Forecast Accuracy) and DiP, so as to have visibility on Prospects shipto as well.

- Quotes

The Quotes interface allows to get the quote information.

No DFU is created in DynaSys based on the quotes. Only the quote information (volume and price) is imported on existing DFUs.

Import / Source: Quotes are sent from SFDC to DynaSys through a csv file: DYS_SF_QUOTES.csv.

To go further :

[Link to the CRM Wiki](#) to get more information on how the Opportunities/Quotes are managed in SFDC.

CRM (SFDC - Salesforce.com) => DynaSys interface overview

SFDC sends every weekday around 00:15 AM 2 files into AP21/In folders: DYS_SF_CRM (Opportunities) + DYS_SF_QUOTES (with the Price Quotation).

Files are integrated into SQL Datahub where we might apply functional filters by GBU (ex: exclusion of certain Opportunities with a given 'Opportunity types' or 'Stage')

