

# CRM CONNECTOR

## SPEED SALES AND SYNCHRONIZE PARTNER DATA

Zift's **CRM connector** allows near-real-time automated synchronization of data between Zift Partner Relationship Management (PRM) and your Customer Relationship Management (CRM) application, be it Salesforce.com or Microsoft® Dynamics. So, you and your partners have confidence you're seeing a true, up-to-date picture of your channel performance from wherever you're working.



### Your Data, Your Way

Get a 360-degree view of your CRM and PRM data with a master dashboard that displays all activities, including real-time synchronization status. Configurable integration lets you customize, view and update mappings without expensive development effort. Clearly see and sort imported and exported records by status. Drill-through to source data for problem solving. And display response messages from both systems. Our sophisticated matching algorithm minimizes data duplication. Should they appear, data errors are easy to spot with highlighting and links to related records for data integrity management.

#### PRM: CRM CONNECTOR

Synchronize CRM &  
PRM Data

Connect Zift PRM with  
Salesforce.com or Microsoft®  
Dynamics

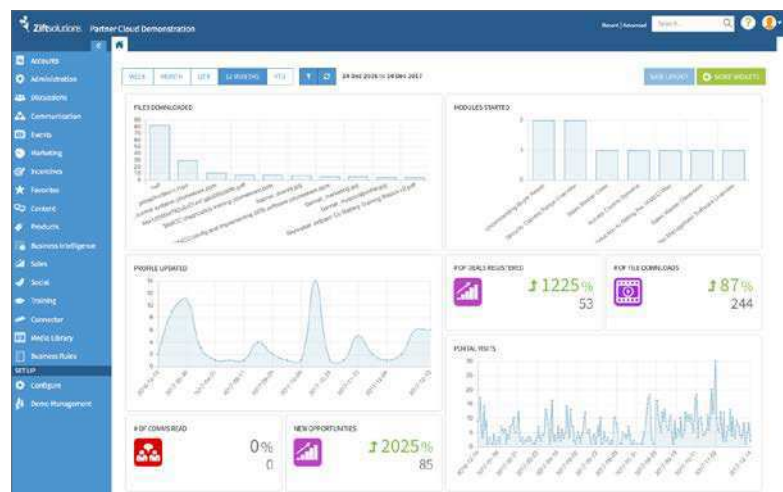
Make Partner Data  
Available to All

Drive Partner Engagement  
& Sales

Reduce Errors & Data  
Duplication

Maximize Return on  
Channel Investments

Cut CRM Costs - No  
Additional Partner  
Licenses Required



Get more value and business insight from  
your CRM and PRM data



## Zift's CRM Connector is:

### Ready to Use

Zift's CRM Connector is ready-to-use for standard Salesforce.com and Microsoft® Dynamics users — with core objects already mapped, and best practice workflows for partner recruitment, partner account management, lead distribution and opportunity management. Partner account managers choose where they work; either in Zift PRM or their CRM tool. (Data is always the same in both applications - and no additional CRM licenses are required for partners.) Standard mapped objects include people and accounts, leads and opportunities, products, price books and sales history.

### Easy to Configure

Automated bidirectional data synchronization ensures your sales team and partners are working with the latest data, whichever system they access. Plus, Zift's Configurable Mapping Tool lets you extend the rules while maintaining control, providing immense flexibility

for updates and processes. Easily import, view and update rules for objects. Direct data flow, trigger workflows and notification emails, and test mapping changes via dry-run without risking production data.

### Scalable & Fully-Supported

Architected to support bulk batch updates as well as individual records, Zift's CRM connector works for partner programs of all sizes, with the scalability and high-volume processing capacity to support even the largest partner communities. Moreover, the Zift CRM Connector is continually monitored by our always-on Support Service.



## Zift's CRM Connector includes:

- ✓ Standard Object Mapping
- ✓ Initial Set-Up for Custom Mappings
- ✓ Account, Contact & Contact Roles
- ✓ Products & Price Books
- ✓ Opportunities & Opportunity Line Items
- ✓ Lead Distribution to Partners
- ✓ Deal Registration
- ✓ Preserved Object Relationships & Attachments
- ✓ New Partner Registrations
- ✓ Training



## Why Zift Solutions?

More than 80% of channel chiefs and more than half a million partners rely on Zift Solutions to drive channel success. Zift Channel as a Service automates all channel marketing, sales and operations processes – and integrates seamlessly with established systems and infrastructure to provide faster ROI and deliver better results.

Learn more at [www.ziftsolutions.com](http://www.ziftsolutions.com).

