

iSupport[®] Training Course

SETTING UP CUSTOMER DATA INTEGRATION

DESCRIPTION:

Most companies maintain their customer data in an external database/directory. Why duplicate work by having to re-enter it in iSupport? This course will show you how iSupport can hook to external sources to provide a single point of entry for customer information. The course will also cover synchronizing the data so that customer information is always refreshed and accurate. This course typically runs up to one and a half hours.

TOPICS COVERED:

Entering Active Directory, Domino, Microsoft CRM,
or Other Remote Database Connection Information
Mapping to iSupport Customer Profile Data
Using Multiple Sources for Customer Data
Synchronizing with iSupport Customer Profiles
Using the iSupport Active Directory Query Utility
Q&A as Needed

COST: \$300 per seat
LOCATION: Online
SCHEDULE: 2-5 days in advance

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AGENDA:

Entering Active Directory Connection Information

- Testing the connection using the AD Query Utility
- Entering the Source Name, Search Root and Search Filter (if applicable).
- Setting the AD Synchronization Interval
- Entering authentication information

Entering Domino Connection Information

- Entering the Search Root for the Domino Directory
- Entering authentication information

Entering Microsoft CRM, or Other Remote Database Connection Information

- Enabling Microsoft CRM Integration
- Integrating with Other (Microsoft) Remote Databases
 - o Mapping customer data fields

Using Multiple Sources for Customer Data

- Specifying order of precedence for customer data sources

Synchronizing with iSupport Customer Profiles

- Scheduling Directory Integration agents

Q & A as Needed