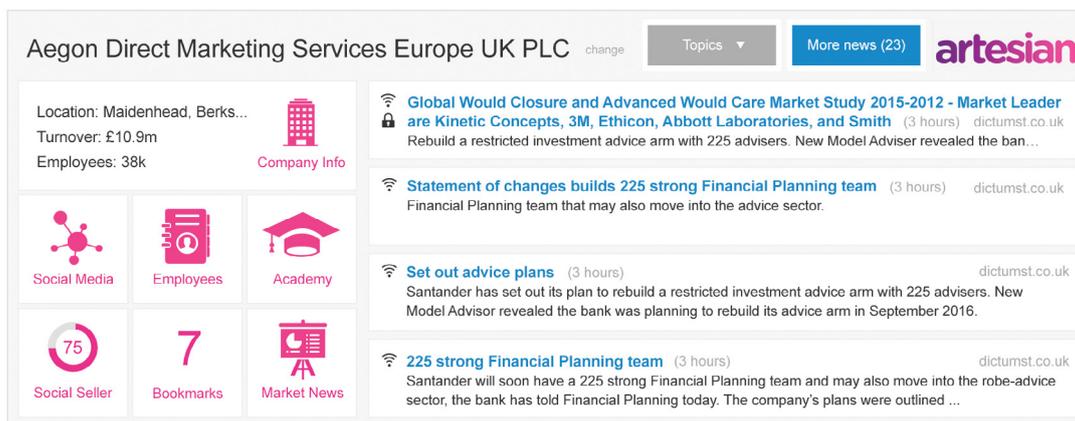


CRM INTEGRATION

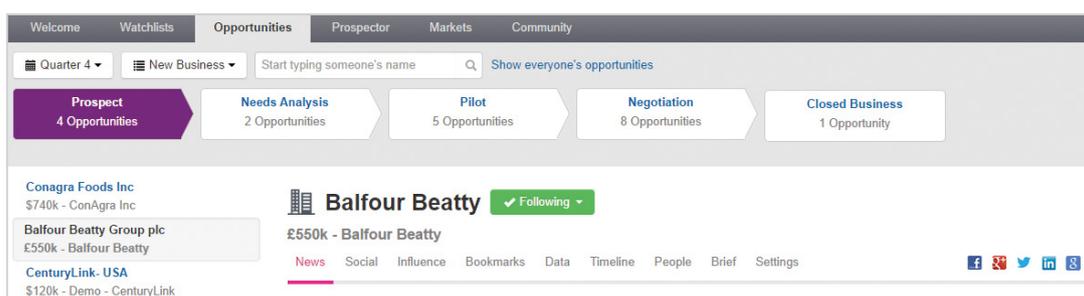
Take Customer Relationship Management to the next level with Artesian. Access business intelligence where and when you need it, within your existing CRM.

Access Artesian information directly within your CRM



- » Integrate within your **Salesforce** or **Microsoft Dynamics** CRM platform
- » Access Artesian news and data directly **alongside your Accounts/Opportunities**
- » Boost **CRM adoption** and take advantage of **CRM specific features**
- » Link out to the **full Artesian platform** for additional functionality.

Access Salesforce Opportunities within Artesian



- » Group companies by your business' **opportunity stages**
- » Proactively identify risks and opportunities within the most **critical forecast** customers
- » **Single sign on** to Artesian with Salesforce login details
- » **No installation or configuration** within your Salesforce platform.

Get in touch with your Customer Success Manager to discuss your requirements:
csmteam@artesianolutions.com

Working with you

Artesian's Services team will work with you to implement the right configuration for you:

1. **Demo and discuss the pros and cons of each configuration option**
2. **Create a personalised instance of Artesian, with which to integrate your CRM**
3. **Demonstrate how you access the CRM information required:**
 - » your Org ID – to set up a secure connection
 - » user ID's, names and email addresses
 - » opportunity stages*
4. **For Full Integrations we will walk you through each step of the process:**
 - » installation wizard to get you up and running quickly and seamlessly.
 - » after installation, the Artesian panel will be available for you to add as Sections in your Account and Opportunity Page Layouts
5. **Discuss your configuration options, such as adding Salesforce Tasks, Leads, Opportunities and Chatter posts**
6. **Create Opportunity stages, based on your business sales cycles and existing Salesforce stages***
7. **Discuss and create groupings for your stages***
8. **Help develop any additional internal processes required (e.g. requests for new tasks, accounts, leads etc.)**
9. **Agree communication and launch plan**
10. **Training**

In addition, for existing customers

11. **Migrate users from Standard to CRM**
12. **Link currently followed companies to your Salesforce accounts**

*Salesforce only