

# DELTA VISTA PLUGIN FOR MICROSOFT DYNAMICS CRM

## Expansion of the CRM 360° view through credit rating

Would you like to have your customer data available quickly and in a clear format, but also be able to check the credit-worthiness of your customers at the same time? The Deltavista plugin for Microsoft Dynamics CRM developed by ELCA provides an integrated “traffic light system” for categorising risks which can be integrated in your customer processes using automated interfaces.

### Leading credit rating database

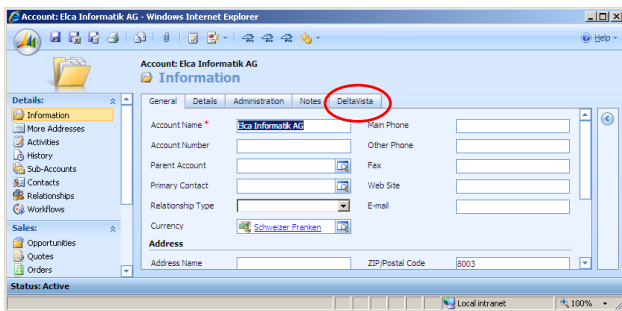
Deltavista operates the largest risk data pool in Switzerland. More than 60% of all collection cases processed by Swiss debt collection companies are available in the database. This information is supplemented by collected data from customers and bankruptcy publications.

ELCA developed the Deltavista plugin to provide Microsoft Dynamics CRM users with well-founded and up-to-date information on

the credit ratings and creditworthiness of companies and private individuals. This enables them to assess the non-payment risk of all applicants in as differentiated a way as possible and adapt the products, prices, payment options and credit limits they offer according to that risk. The Deltavista Credit Check supports a differentiated, risk-based credit rating strategy and the CRM-integrated solution also allows the back office to access the detailed information.

### How it works

The Deltavista service can be called up directly from MS CRM using a button in the account or contact view.



The Update function can also be used to update several contacts simultaneously.

### Address updates

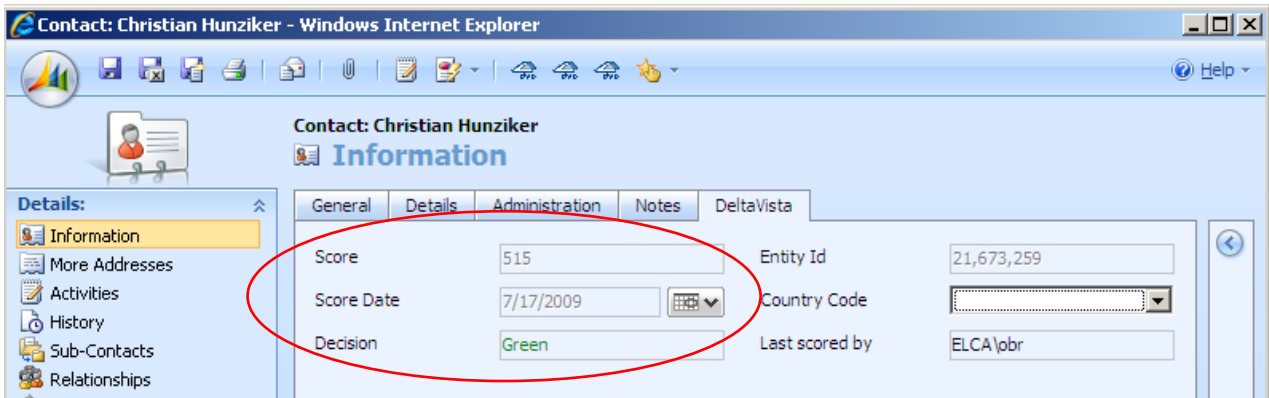
The contacts are highlighted and copied to Deltavista directly via a web service by clicking on the «DV Update» button. This automatically updates the address information for those contacts or companies. Each time a contact is updated, an entry is added to the history of that contact. So you can clearly see when the Deltavista information for that contact was last updated.

### Verification of requests – Scoring

The scoring module enables the verification of a specific request. Deltavista provides a detailed report in PDF format for each rating which is automatically added to the contact.

***“The integration of the Deltavista credit rating database in Microsoft Dynamics CRM as a plugin allows us to optimise and fully document our processes.»***

**Peter Hofer, System Manager CRM, Goldbach Media Management AG**



The information from Deltavista is displayed clearly in a separate tab.

### Reliable identification

Early and clear identification of a person or company is the basis of a risk assessment. Thanks to close collaboration with data suppliers, up-to-date data processing methods and a fault-tolerant

search function, Deltavista can find the required person or company with a high level of accuracy even using automatic comparison processes.

### ELCA relies on comprehensive analysis and integrated solutions

ELCA is one of the largest independent IT service providers in Switzerland and was recognised as a «Swiss Rising Star» in 2008 thanks to its intense activities and successes in the field of Dynamics. ELCA can help you introduce a new CRM solution and will ensure that you can access the latest information on your customers and leads at all times with the help of the Deltavista plugin. We would be happy to help you optimise the management of your business, sales and customer processes.

Our approach considers the requirements of a CRM system from the perspective of the company as a whole - from the sales process to the organisation of customer data, to the analytical CRM functions and reporting for proactive marketing. Our analysis includes successful integration into your existing IT system landscape and related systems.

Our consulting department will help you to define your CRM strategy and work out a solution geared to your requirements. Building on our wide range of experience as an integrator and software developer, we can ensure seamless integration into your existing systems.

For us, an integral approach means that all user groups affected by CRM should participate in the analysis and design phase. This ensures that we reach a shared consensus about the scope and type of solution and guarantees broad acceptance upon introduction.

### IT-Solutions by ELCA

[www.elca.ch](http://www.elca.ch)

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