Connect ERP to CRM (Salesforce / Dynamics) Hands on Training Course

Professional Development Training Course Outline

Category	Enterprise Resource Planning (ERP)	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

The integration of Enterprise Resource Planning (ERP) systems with Customer Relationship Management (CRM) platforms such as Salesforce and Microsoft Dynamics has become a game-changer in today's business environment. Connect ERP to CRM (Salesforce / Dynamics) Hands on Training Course is designed to provide professionals with hands-on training to seamlessly connect ERP systems with CRM platforms, enabling organizations to streamline operations, enhance customer experiences, and optimize workflows. As businesses increasingly leverage data to make more informed decisions, understanding how to integrate and synchronize ERP and CRM systems is critical for improving efficiency, reducing errors, and boosting profitability. This course will equip learners with the technical know-how, practical experience, and industry insights to drive business success in a competitive marketplace.

By the end of this training, participants will have gained a solid understanding of how ERP and CRM integrations can be implemented, including the best practices for data synchronization, workflow automation, and reporting. With real-world case studies and practical examples, this course ensures that learners will leave with the skills and knowledge to confidently manage ERP-CRM integrations in Salesforce or Dynamics environments. Whether you're an IT professional, business analyst, or solution architect, this hands-on training will enable you to tackle complex integration challenges and deliver results-driven solutions for your organization.

Programme Curriculum

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Course Duration

5 days

Course Objectives

1. Understand the fundamental concepts of ERP and CRM systems and their roles in business processes.
2. Gain proficiency in Salesforce and Microsoft Dynamics, focusing on integration features and capabilities.
3. Learn how to synchronize data between ERP systems and CRM platforms to ensure seamless information flow.
4. Explore best practices for automating workflows between ERP and CRM systems to improve operational efficiency.
5. Master techniques for managing customer data, sales pipelines, and order management across ERP and CRM platforms.
6. Develop a deep understanding of API integrations and middleware solutions for ERP-CRM connection.
7. Learn the techniques to migrate data between ERP and CRM systems with minimal disruption to ongoing operations.
8. Enhance reporting and analytics by combining data from ERP and CRM systems for comprehensive insights.
9. Explore real-time data syncing between Salesforce/Dynamics and ERP platforms for up-to-date decision-making.
10. Understand security and compliance measures when integrating ERP systems with CRM platforms.
11. Learn to troubleshoot common integration issues, including data discrepancies and system conflicts.
12. Master the use of cloud-based tools to enhance ERP-CRM integrations in modern business environments.
13. Gain insights into emerging trends such as AI-powered integrations and the future of ERP-CRM connectivity.

Target Audience

1. IT Professionals seeking to deepen their knowledge of ERP-CRM integration.
2. Business Analysts looking to enhance their skills in data management and workflow automation.

3. Solution Architects responsible for designing enterprise solutions with integrated ERP and CRM systems.
4. Project Managers overseeing the implementation of ERP and CRM integrations in organizations.
5. Salesforce Administrators and Developers interested in expanding their expertise to include ERP system integrations.
6. Microsoft Dynamics Administrators seeking to optimize ERP-CRM workflows in their environments.
7. Consultants involved in digital transformation projects for clients in various industries.
8. Data Integration Specialists tasked with ensuring seamless data flow between ERP and CRM systems.

Course Modules

Module 1: Introduction to ERP and CRM Systems

- Overview of ERP and CRM systems: Definitions and roles
- Key differences and similarities between ERP and CRM systems
- Benefits of integrating ERP with CRM
- Case study: Integrating Salesforce with SAP ERP for a global enterprise
- Real-world examples of ERP-CRM integration success stories

Module 2: Understanding Salesforce and Microsoft Dynamics

- In-depth overview of Salesforce and Microsoft Dynamics features
- Key modules in Salesforce and Dynamics that integrate with ERP
- Customizing Salesforce and Dynamics for ERP integration
- Case study: Connecting Dynamics 365 to an Oracle ERP system
- Setting up basic Salesforce and Dynamics environments

Module 3: Data Synchronization Between ERP and CRM

- Techniques for syncing customer and financial data
- Real-time data updates between ERP and CRM systems
- Managing data consistency across platforms
- Case study: How an eCommerce company integrates its ERP with Salesforce
- Implementing data synchronization in Salesforce and Dynamics

Module 4: Workflow Automation Between ERP and CRM

- Automating business processes: Sales, orders, and customer service
- Tools for setting up automated workflows in Salesforce and Dynamics
- Benefits of workflow automation in an ERP-CRM integrated environment
- Case study: Automating invoicing and order fulfillment in a Dynamics 365-SAP integration
- Creating automated workflows in both platforms

Module 5: ERP-CRM Integration with Middleware and APIs

- Introduction to middleware and API integration tools
- Popular API connectors for ERP and CRM integration
- Managing middleware for smooth data exchange
- Case study: Integrating Salesforce with SAP using middleware tools
- Setting up API connections for ERP-CRM sync

Module 6: Security and Compliance in ERP-CRM Integrations

- Data security considerations when integrating ERP and CRM systems
- GDPR, HIPAA, and other compliance standards in integrations
- Best practices for ensuring data integrity and privacy
- Case study: Ensuring security in an ERP-CRM integration in the healthcare industry
- Implementing security measures in integration setups

Module 7: Reporting and Analytics Across ERP and CRM

- Combining ERP and CRM data for enhanced reporting
- Building custom reports and dashboards in Salesforce and Dynamics
- Using business intelligence (BI) tools for ERP-CRM data analysis
- Case study: Creating a unified dashboard for sales and financial data in Salesforce
- Building reports and dashboards across ERP and CRM data

Module 8: Troubleshooting ERP-CRM Integration Challenges

- Identifying and resolving common integration issues
- Handling data discrepancies, duplication, and syncing errors
- Tools and techniques for troubleshooting integration problems
- Case study: Resolving issues in a failed ERP-CRM integration project
- Troubleshooting an ERP-CRM integration scenario

Training Methodology

This course employs a participatory and hands-on approach to ensure practical learning, including:

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

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