Dynamics and third-party integration

Trevor Helps, Technical Director, Omfax

Omfax Systems and Touch-Base have been working together to provide housing customers with repairs and enquiries diagnostics software for over 20 years. The two companies became one this summer, and the first thing we did was to address a slight change in the market that we've been noticing over the past two years.

Keyfax as a repairs diagnostic and general enquiries 'pop-up' has been integrated with all of the major housing management systems (to date over 14 of them) including many flavours of online portals for customer self-service. But an increasing number of our customers have been looking at Keyfax integrated with Microsoft Dynamics CRM.

The first two customers who asked about Dynamics integration were working with third-party Dynamics consultants who built their integrations using Keyfax Web Services. As part of any integration project, we ask for documentation: what is the data that gets passed to launch Keyfax, what gets passed back, and what CRM fields are they mapped back into? Perhaps unsurprisingly, we are still waiting for the documentation, and the consultants are long gone.

Why Dynamics CRM?
Whether Dynamics is seen as a more 'standard' offering than the major housing management systems or it offers cost savings in some areas is not clear. However, what is clear is that some customers have plans to migrate their housing systems to Dynamics. There seem to be more Dynamics suppliers establishing their positions in social housing too - just google 'Dynamics for social housing'.

The market seems to be changing; about 9 per cent of our customers have migrated to Dynamics or are in the process of doing so. Two of them are recently-merged housing groups, incorporating several smaller housing providers, so they represent a large number of end-users.

Why not let the suppliers integrate?
When we work with third-party consultants, we often find that their approach is to produce a minimum viable product (MVP) or a proof-of-concept (POC). The MVP rarely harnesses the real power of Keyfax and the POC is often used as-is, without really looking to expand what the integration could do. When technical support calls come in to resolve an issue between the systems, the Omfax support team often has little to go on, without the requested documentation.

But all this disappears now that we have a standard integration for Dynamics that is fully documented. This means that we don't have to understand and support different integrations from multiple suppliers.

With this new integration, because it is our own development, if we meet any issues then they are ours to fix and will always be our highest priority. And since we deeply understand Keyfax, this development goes well beyond MVP, to give users the power to make their own changes.

For existing integrations with the big housing management systems, if a customer wants to change what data is sent into or out of Keyfax, they have to talk to their HMS provider and to Omfax, agree what's needed, and then book time and spend money getting small changes done at each end. But with this Dynamics integration customers can:

- Alter data into or out of Keyfax on launch and completion;
- Choose which version of Keyfax to launch;
- Instantly adjust how data is mapped back into Dynamics.
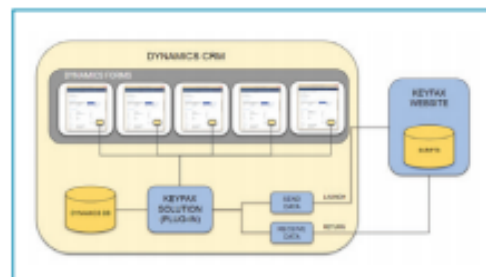
Dynamics launching Keyfax
The Dynamics integration to Keyfax currently supports Web Legacy and Unified Interface modes and will shortly support Dynamics Unified Interface within the Dynamics 365 App.

Using Plugin technology, a Keyfax 'launch' button can be easily added to any Dynamics form.
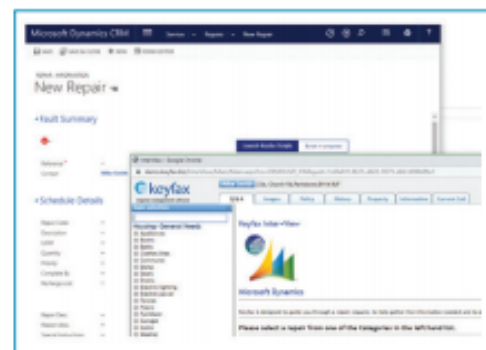
Imagine that a contact-centre user has identified an individual tenant in Dynamics. The user chooses a new repair and then hits 'Launch Keyfax Scripts' which pops up the Keyfax browser window on top of Dynamics.

Keyfax is passed the name and address details, but can also be configured to receive any other data held in Dynamics.

When the script completes, data elements are mapped from the Keyfax 'export' data back into the individual fields of the Dynamics form, as shown in the repair summary top right.

All basic Dynamics datatypes are supported along with Lookups, Option Sets and Option Pairs. You can set default values to be used where data elements

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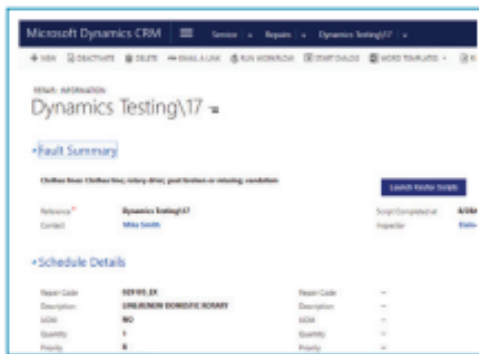
are missing, and these can be set in the Mappings.

Logging & mapping

For general troubleshooting and to help with building Mappings, a 'Logging' mechanism is provided. This shows all data sent and received from Keyfax.

The Mappings define which data elements are sent to Keyfax on start-up. These mapped data elements are available to Keyfax scripts and greatly enhance the script's power and capabilities, often reducing the number of question and answer steps required.

If you need more data to use in your Keyfax scripts, like the housing officer for this tenant or their heating type, then you can simply include that in the start-up data. For really tech-savvy people, FetchXML can also be used within Dynamics to construct a query to provide any additional data elements, such as parental account/contact details.

With the configurability that the Dynamics/Keyfax integration provides,

the possibilities of harnessing the power of Keyfax scripts by a variety of Dynamics business areas is now something that customers can control and further develop themselves. With an increasing proportion of the social housing sector looking at Dynamics as their next CRM system, we're pleased to offer a standard integration which puts integration changes and mappings where it belongs, back in the customer's hands.

Trevor Helps is the technical director of Omfax.