



# Product Information Management in Microsoft Dynamics 365 FO

With Perfion PIM, you can work directly with real-time ERP information such as prices and inventories from the same place that you manage all other types of product data.

# Product Information Management in Microsoft Dynamics 365 FO

Perfion gives you Product Information Management (PIM) – 100% integrated into your Dynamics 365 for Finance and Operations ERP solution.

Using the Perfion PIM system directly in Dynamics 365 enables you to:

- ✓ Manage all of your product data in Perfion – descriptions, technical specifications, pictures, video materials, etc. – TOGETHER WITH transactional data from Dynamics 365, all in one place.
- ✓ Dynamically generate brochures, data sheets and other marketing materials with always-updated data in a print-ready PDF format.
- ✓ Easily export product data from Perfion and Dynamics 365 to apps, websites, webshops and online portals.

*”I can actually generate product data sheets directly from an offer at the press of a button in Microsoft Dynamics without having to re-enter information a second time in another system. Therefore, we have remarkably reduced the administrative burden in connection with preparing offers”*

Grégoire Zelenka  
CEO  
Maison Truffe AG

## The advantage of 100% PIM integration in Dynamics 365 FO

Working with Perfion directly in Dynamics 365 keeps your ERP system simple and streamlined. Only transactional data is stored in your ERP system – all other data is stored in Perfion. This ensures a higher degree of standardization and fewer adaptations in your ERP solution, while giving you the power to work with data from both systems at the same time.

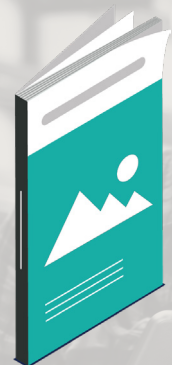
## The advantage of fewer adaptations in Dynamics 365 FO

Limiting the number of adaptations in your ERP system lowers the system’s operating costs, and storing only transactional data in the ERP system improves its performance. It is also faster and easier to upgrade to new versions when you have fewer adaptations to consider.

## The advantage of creating publications directly in Perfion

When dynamically creating brochures, data sheets and other publications with Perfion integrated in Dynamics 365, Perfion retrieves data from the ERP system at the very moment it is to be used. This ensures that all data in your new publication is valid and up-to-date.

You can also quickly generate catalogs, price lists and data sheets with content and prices adapted for specific customers. Perfion retrieves prices, products, customer and inventory information directly from Dynamics 365, which minimizes the risk of error.



# 100% PIM integration in Dynamics 365 FO



## Sales-ready products are easily released from Perfon to Dynamics 365 FO

Given that the life of a product typically begins long before it should be registered in the ERP system, it is often useful to register new products in Perfon first.

The **Perfon Release2ERP for D365FO module** makes it quick and easy to configure a release process that automatically releases products to Dynamics 365 when they meet predefined criteria. The required fields in Dynamics 365 can either be filled in automatically, or a process can be triggered so that the product is released when all business-critical information is available.

## The advantage of registering products in Perfon first

During the development and evaluation of potential new products, you often need to collect and store a lot of product information. However, it is important that the product avoid contact with the ERP system until it is actually ready for sale.

With Perfon as a connecting link, you avoid registering a lot of irrelevant products in Dynamics 365, which further helps to keep your ERP system simple and streamlined.

# Master Data Management with the PIM system

All product data from Perfion is also accessible in Dynamics 365. Some types of business data must be stored in a specific way in Dynamics 365 to ensure optimal performance. You can either:

- ✓ Use Perfion to link to live data from Dynamics 365, or
- ✓ Use Perfion as a source of master data to keep Dynamics 365 updated.

*”By choosing Perfion we can now link the structured and unstructured data. This allows users the to see all the data at the same time due to Perfion’s ability to integrate with Dynamics.”*

Vic Wotherspoon,  
General Manager - Information Technology  
NHP Electrical Engineering Products Pty Ltd.

