Filament Syfter Product Sheet
Salesforce CRM integration

Realise the value of your CRM investment

CRM systems are a powerful tool to manage your key relationships and expose your deal pipeline. Syfter is designed to handle a much wider dataset than a CRM system, providing the integration and data management tools to bring together data from across your firm, plus a clean interface to interrogate these multiple, heterogeneous data sources. Let the CRM system do what it does best, and Syfter will take care of the rest.

A key benefit of Syfter is its powerful CRM integration. It merges the wealth of data available in your CRM with data held in other software, document repositories, and external sources to provide a 360 view.

More than that, a comprehensive bi-directional sync between Syfter and your CRM enables you to:

- Enrich or update records in your CRM with more detailed and accurate data
- Regularly update CRM records, keeping them fresh
- Create new records in your CRM at the click of a button based on newly identified targets held in Syfter
- Pull data from your CRM into Syfter and surface it to a wider range of non-CRM users

Contact your Account Manager or Filament Sales at hello@filament.ai for more information.

FILAMENT SYFTER

Technical requirements and functions

Syfter requires access to your Salesforce CRM instance via an Application User with appropriate Create, Read and Update permissions to in-scope entities and fields. This is done via 'User Impersonation' rather than devoting a user licence specifically to the integration, but you should consider whether you want API access and activity separated from your other users.

Technical requirements and functions

- App Registration must be created with user_impersonation permissions
- An associated User in Power Platform admin centre added with a Security Role that has all the necessary permissions for all the entities to be interacted with (including 'Accounts' and 'System Users')
- Client ID, Secret, Tenant and Organisation Server URL should be provided.

CRM Pull (automatic)

- Depending on requirements Syfter standard or custom properties will be mapped to the appropriate OOTB or custom fields in the CRM Account entity or other related entities
- Matching rules and rules relating to which fields Syfter can create or edit are configured
- Syfter will attempt to match CRM company records to existing Syfter company records
- Where a matching record is identified, Syfter updates its company record with any new CRM information
- If no match is identified Syfter creates a new company with the link back to the CRM.

CRM Push (manual)

- When no CRM relationship exists between Syfter and the CRM system a user can push a company into the CRM and define relevant data as part of the process
- Fields available to the user via Syfter UI must be defined, including those that are mandatory within the CRM system
- On 'push' Syfter creates a new company record in the CRM system including a relationship between Syfter and CRM
- The user will receive an error message if they have not met defined requirements when attempting to push a record to the CRM system.

CRM Push (automatic)

- The CRM system is routinely populated with specified updates from Syfter
- Occurs automatically at a predetermined schedule
- Create or Update permissions specified for each CRM field
- Existing CRM rules such as mandatory fields are adhered to - no data is pushed unless it meets minimum requirements