

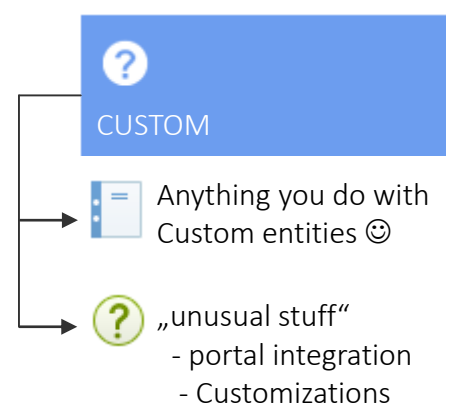
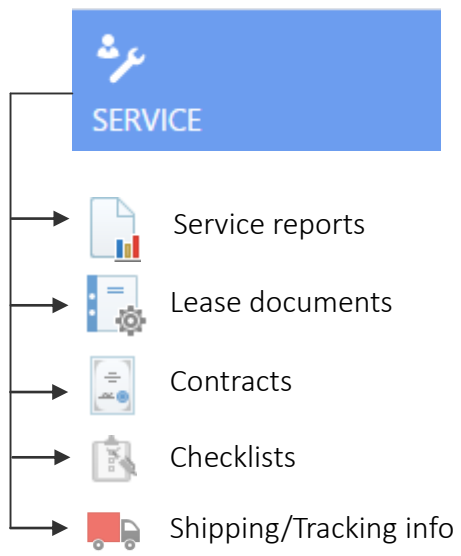
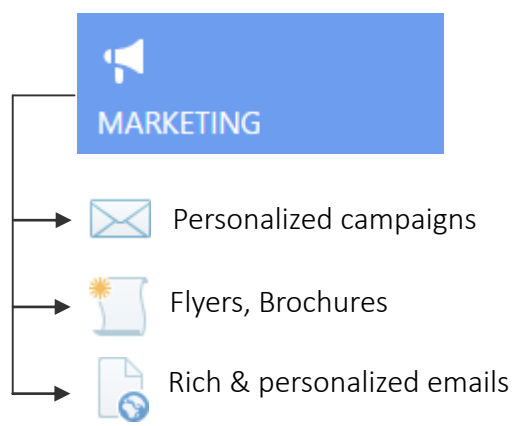
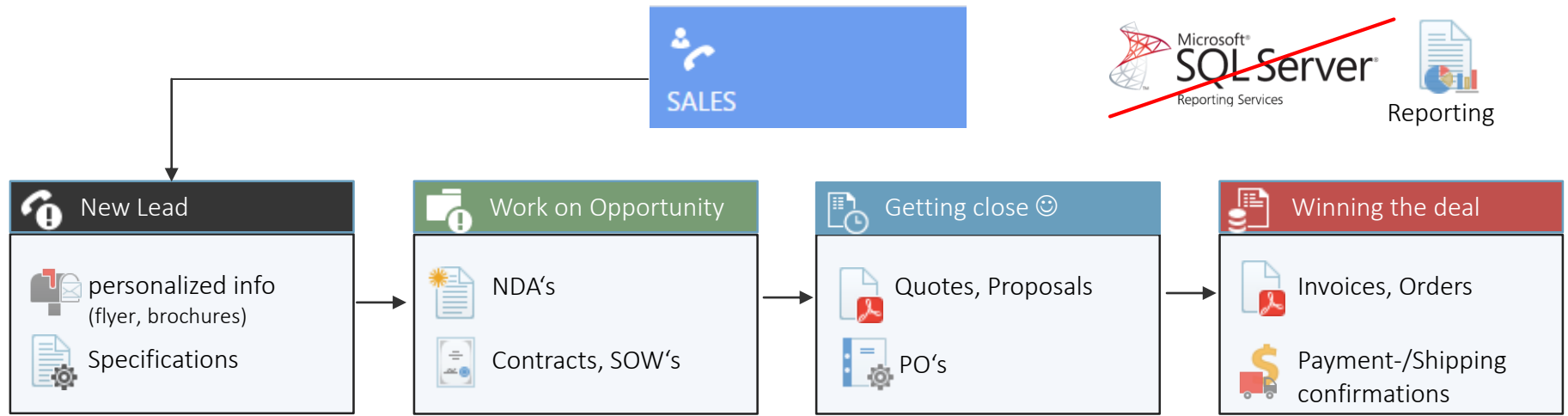


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Your company for MS-CRM ADD-ONS!

Microsoft Dynamics CRM 2016 Solution overview

Thursday, 4th February 2016

Documents in a CRM environment



DocumentsCorePack

Unified document solution: Creation – Processing - Automation

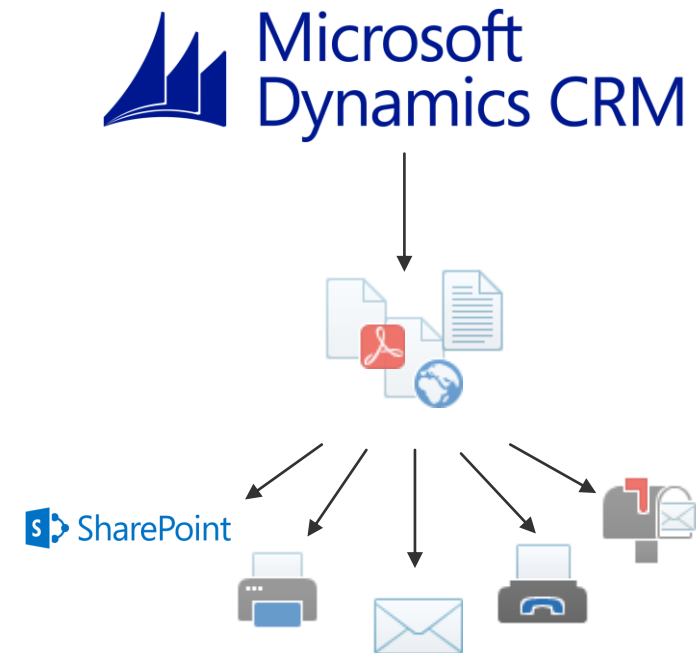
Goal: simplify and streamline document-related business operations in Microsoft Dynamics CRM

- **Professional document generation**

- MS Word Based Templates, no SSRS needed
- All common file-types supported
- Powerful CRM connector: Custom entities & attributes, multi-relation-support, calculations, QR-codes, dynamic pictures...

- **Processing Capabilities**

- Mailing (generate attachments and email content)
- eSignature-integration (DocuSign, AssureSign)
- Sharepoint integratoin
- Printing
- Attach as note
- Attach to email or letter
- ...



How it works

Where are documents generated ?

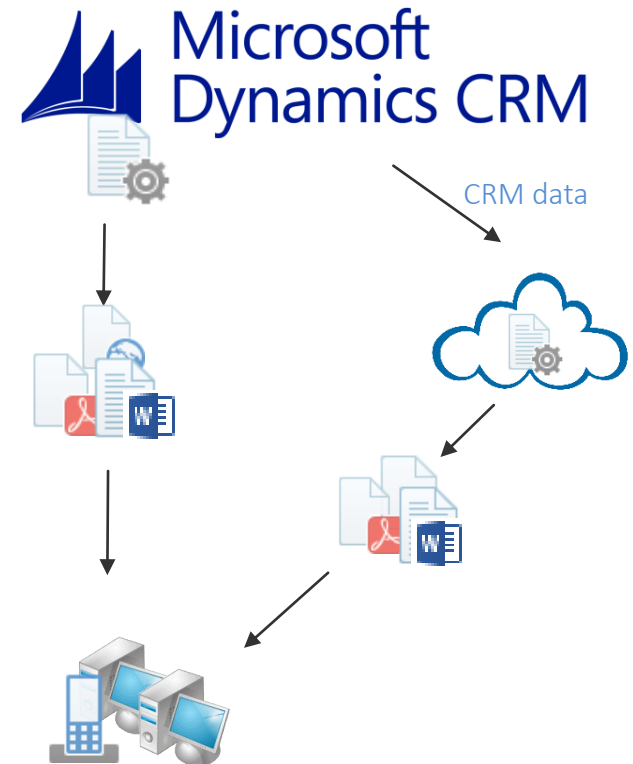
- Plugins inside MS CRM instance
- Document Generation Service (running local or on the Cloud)

How to initiate the document generation?

- CRM Commandbar: Document Generation Wizard
 - 3 steps (Select report, choose document purpose, review)
 - Commands & One-Click actions
- Workflow-integration: Document Automation
 - Automated business processes. (e.g. Shipping confirmations)
 - Scheduled reports

Supported platforms

- CRM On-Premise, Online and hosted (IFD environments)
- CRM 3.0, 4.0, 2011, 2013, 2015, 2016



AttachmentExtractor

move files from CRM to SharePoint or a Fileshare



<ul style="list-style-type: none">- Attachments stored in CRM database take up to 70% of storage- Hard to find / non-searchable- 9.99 USD / GB per month	<ul style="list-style-type: none">- Move/Copy files to SharePoint- Shrink CRM database by >50%- Replicate data / local availability- Establish structured library	<ul style="list-style-type: none">- Advanced document library- Associated to CRM record via CRM SharePoint Integration- Easy to search- 0.20 USD / GB per month
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Example: 50GB additional storage (annual costs)

- CRM storage: \$ 5994
- SharePoint: \$ 120

Total Savings: **5874 USD per year!**

How it works

All work is done by a Service

- Running on a local computer or server
- Running on a VM in the Cloud

Tasks

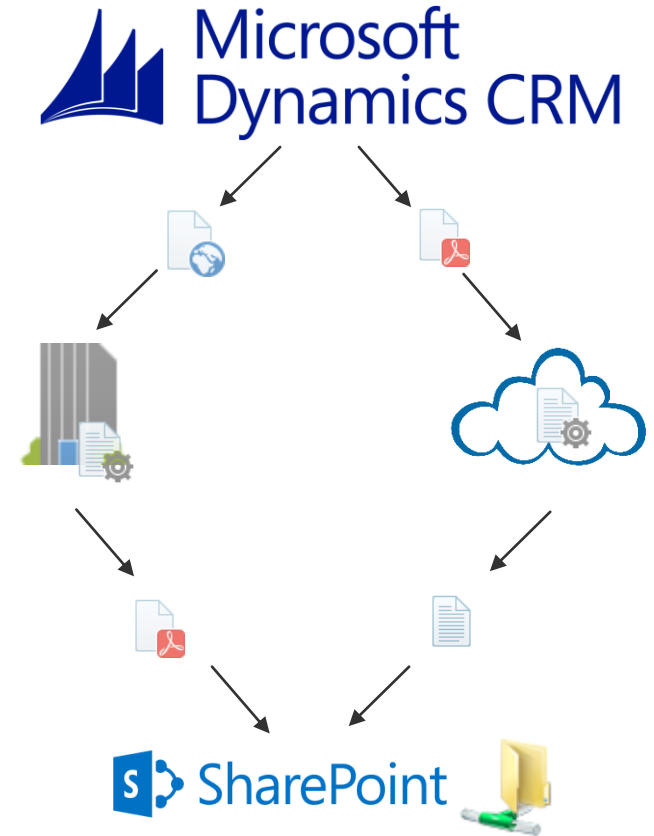
- Check for new emails/notes every X seconds
- Move/Copy file to alternate storage
- Place link to extraced file inside MS CRM
 - **No change in CRM UI!**

Features

- Dynamic save locations based on CRM data
- Black- & Whitelist
- Scheduler

Supported platforms

- CRM On-Prem, Online, Hosted (IFD); Sharepoint Online and On-Prem
- CRM 2011, 2013, 2015, 2016; Sharepoint 2010 and upwards



TelephoneIntegration (CTI)

Connect your phone system(s) to Microsoft Dynamics CRM

Why using a CTI?

Capture phone calls (incoming and outgoing)

- Screen – Pops: Know who is calling
- Auto-create phone call activities
- Auto-Create CRM records (leads, opps, cases,...)

Simplify dialing

- Click2dial from CRM UI
- Efficient Power-dialing from dialing lists

Call statistics, Call analysis

- Utilizing MS CRM Dashboards



TelephoneIntegration



RingCentral®

SDK



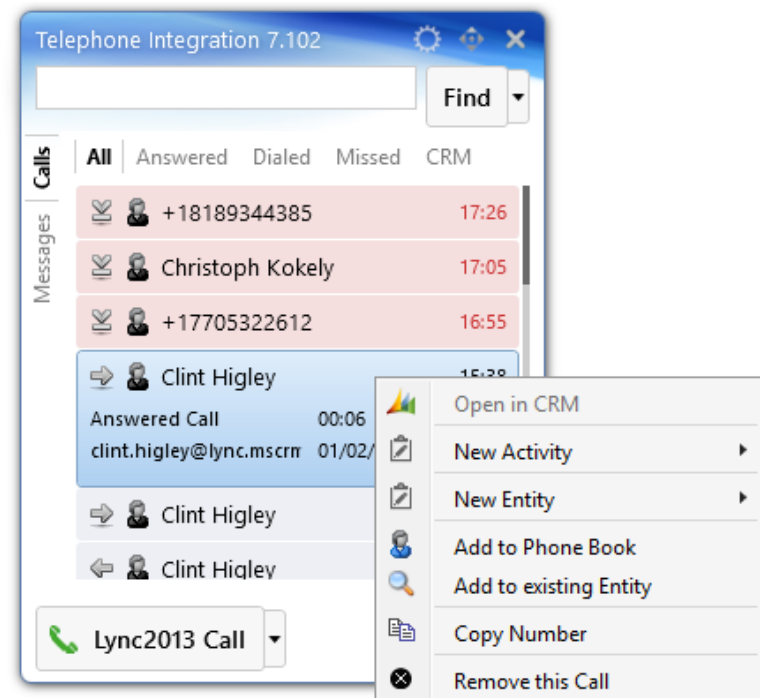
How it Works

- **TI-Server (CRM solutions)**
 - Click2Dial inside CRM
 - Call statistics, Call analysis
- **TI-Client: Main UI**
 - Perform calls / react on incoming calls
 - Perform CRM operations
 - Create records (activities, leads, contacts, ...)
 - Integrated CRM-Search
 - ...
 - Host PowerDialing Lists (for InsideSales/Telemarketing)

Supported platforms

- CRM On-Prem, Online, Hosted (IFD)
- CRM 4.0, 2011, 2013, 2015, 2016

Telephone Integration Overview

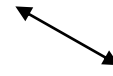
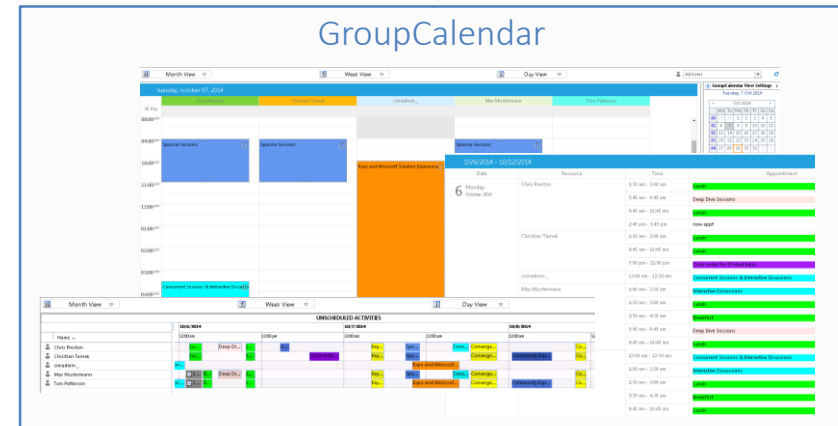


GroupCalendar

Simple scheduling Tool for Dynamics CRM: *Users – Facilities - Teams - Resources*

Why would I use it?

- **Effective Team & Resource scheduling**
 - Get an overview of your Team's schedule
 - See availabilities of users and resources
- **6 Views**
 - GANTT-view
 - Top-Down (daily, week-view)
 - Agenda
 - TimeLine
 - Month-view
- **Scheduling made easy**
 - Avoid conflicts (highlight overlappings)
 - Drag & Drop rescheduling
 - See working hours & time-off
 - Color coding
 - Assigning unscheduled activities and appointments
 - ...



ActivityTools

Advanced activity-Handling in MS CRM: Outlook-like visualization

Why would I use it?

Increase productivity by providing tools to handle activities more efficiently

- **Visualization**

- Outlook like- view of activities
- Quick and Advanced Search
- All activity-types supported
- Flexible Preview

- **Email-options**

- Define personal email signatures
 - WYSIWYG-editor
- Define default signatures/senders
 - e.g. for support-team



ACCOUNT *
MSCRM-ADDONS.com

Account Overview

ACCOUNT INFORMATION

Notes	4
Accounts	2
Contacts	6
Documents	3
Quotes	224
Orders	6
Invoices	6

Account Name *
MSCRM-ADDONS.com
Parent Account
Website
http://www.mscrm-addons.com
Phone
404720066
Fax
--
Ticker Symbol
--
Primary Contact
Howard Higley
Bahnhofguel 59
8020 Graz Steiermark
AT
neg
--

Search for Ent

Annual Revenue
--
No. of Employees
--
Owner *
 Clint Higley

ActivityPreview

ACTIVITIES / All (224) Quick Search

NEW ACTIVITY RELOAD

Call From	Mark Watson	Phone Number	0404720066
Call To	Michael Dole	Direction	Outgoing
Subject	Item		

LAST WEEK

- Clint Higley Item We 5/27
- Clint Higley Some Bikes & Computers (3/15/2015 1:00 P Tu 5/26

TWO WEEKS AGO

- Clint Higley You have been unsubscribed... 1/20/2016

THREE WEEKS AGO

- Clint Higley You have been unsubscribed... 1/11/2016

EARLIER THIS MONTH

- Clint Higley QUD-01021-8NTM05 1/5/2016
- Clint Higley You have been unsubscribed... 1/5/2016
- Clint Higley QUD-01021-8NTM05 1/5/2016

OLDER

- Clint Higley QUD-01021-8NTM05 12/10/2015 Regarding Status Reason Made Created By Clint Higley Created On 1/27/2016 3:23 PM
- Clint Higley You have been unsubscribed... 12/16/2015

Supported platforms

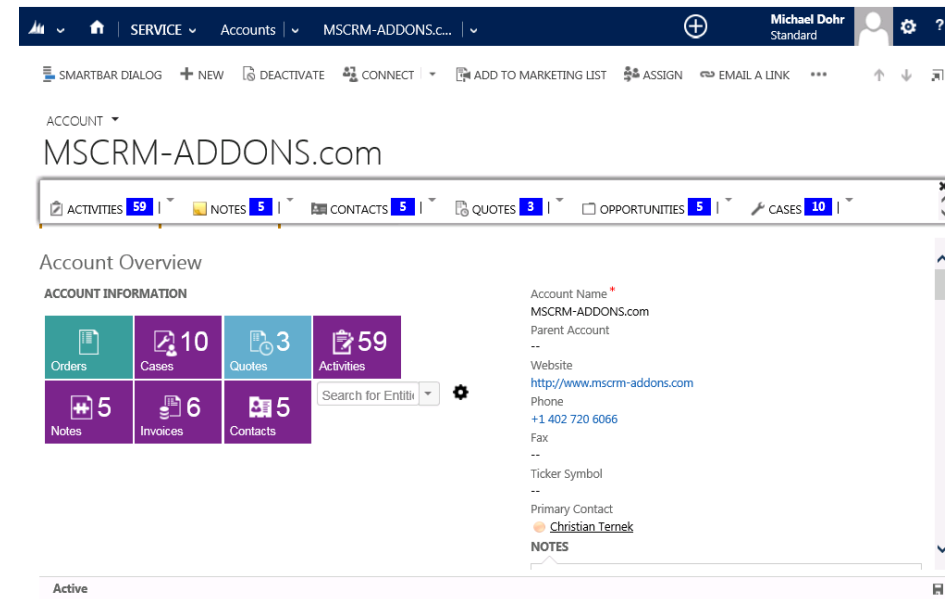
- CRM On-Prem, Online, Hosted (IFD)
- CRM 4.0, 2011, 2013, 2015, 2016

Enhance CRM- User experience: Navigation, QuickAccess & „One-Click“-Actions

Why would I use it?

“Save time by adding navigational or functional buttons”

- **Simplify Navigation**
 - between related records
 - Personalized menus
- **Count & Quick-Access of related records**
 - Access related records/activities,...
 - See count of related entries (e.g. # of quotes, invoices...)
- **One-Click actions**
 - Fire workflows / javascript
 - Open links
 - Access CRM sitemap entries (e.g. security roles, processes, users, templates,...)
 - ...



Supported platforms

- CRM On-Prem, Online, Hosted (IFD)
- CRM 2013, 2015, 2016

Thank You

Feel free to join our upcoming Webinars!

<http://www.mscrm-addons.com/Support/Webinars.aspx>


Resources:

- You can find us on the web at <http://www.mscrm-addons.com>
- Help-Center (Live-Chat, Support): <http://www.mscrm-addons.com/Support.aspx>
- Don't forget we have an awesome blog at <http://blogs.mscrm-addons.com/>, you'll find it to be a helpful resource!

Contact:

 US: +1 404 720 6066

 support@mscrm-addons.com

 Europe: +43 (316) 680 880

 office@mscrm-addons.com