ReEmployAbility®

CASE STUDY

Efficient and adaptable solutions for generating and creating customized documents

ABOUT

ReEmployAbility is the nation's largest provider of early return-to-work services and transitional employment programs. Through its proprietary program, The company connects injured workers to light-duty assignments.

CHALLENGE

ReEmployAbility relied entirely on its database and struggled to navigate Dynamics 365. They found it challenging to create documents that were easy and quick to generate. Additionally, extra storage space was expensive to purchase.
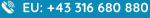
SOLUTION

For all the challenges ReEmployAbility was facing, mscrm-addons has a solution. Three of our best solutions helped ReEmployAbility take their Dynamics 365 user experience to the next level: DocumentsCorePack for fast and simple document creation, SmartBar for quick navigation through records in Dynamics 365, and AttachmentExtractor for cost-effective storage capacity. Professional documentation process.

01 ▶ Efficient and Streamlined Document Creation

After integrating DocumentsCorePack into their daily tasks, they could create documents quickly and easily. The template designer was able to automate the process and generate professional documents. Using One-Click-Action and multi-part features allowed ReEmployAbility to go from manually selecting templates to simply clicking a button that predefines which templates to merge all at once. In this way, they could avoid manual errors and save time and effort.

02 ▶ Cost-Effective Storage Solutions

The AttachmentExtractor add-on optimized data capacity for reEmployAbility by relocating emails, attachments, and email contents to SharePoint. This transition provided a cost-effective storage solution, significantly reducing costs. It transferred a high volume of daily emails, and the add-on operated seamlessly in the background, ensuring smooth and efficient performance without disrupting daily operations. This integration not only enhanced storage efficiency but also value for money.

03 ▶ SmartBar: Enhancing User Experience and Efficiency

SmartBar provides ReEmployAbility users with an immediate visual cue of record status or involvement using colours or images. This solution removes the necessity to scan through forms or click on related records and saves time spent searching for information. Additionally, it ensures an accurate record count in Dynamics 365. The team appreciated the colour-coded tile style based on specific criteria and the convenient drop-down menu feature.

CONCLUSION

In conclusion, ReEmployAbility effectively integrated solutions from mscrm-addons. DocumentsCorePack facilitated efficient document creation and processing with its diverse tools. AttachmentExtractor improved data capacity by moving email attachments and content, while SmartBar boosted navigation and record management in Dynamics 365.

Are you ready to revolutionize the way you handle your documents too?

▶ START YOUR 14-DAYS FREE TRIAL! | All features and support included

❝ The smart tools mscrm-addons.com has developed have taken our experience with Microsoft Dynamics to the next level. The tools are well-developed, well-supported, and the team is wonderful to work with. Everyone I´ve ever communicated with on the mscrm-addons.com team, from support to sales to execs, have been friendly, knowledgeable and helpful. ❞

Abby Torres, Director otf IT