

mscrm-addons.com
Your company for MS-CRM ADD-ONS!

MS CRM 2015 Solution Overview

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Wednesday, 11th March 2015

DocumentsCorePack

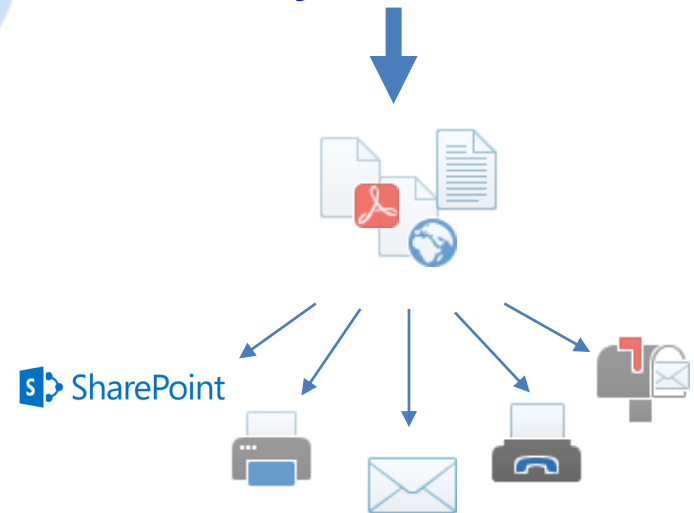
Unified document solution: Creation – Processing - Automation

Simplify generation & processing of documents based on CRM data

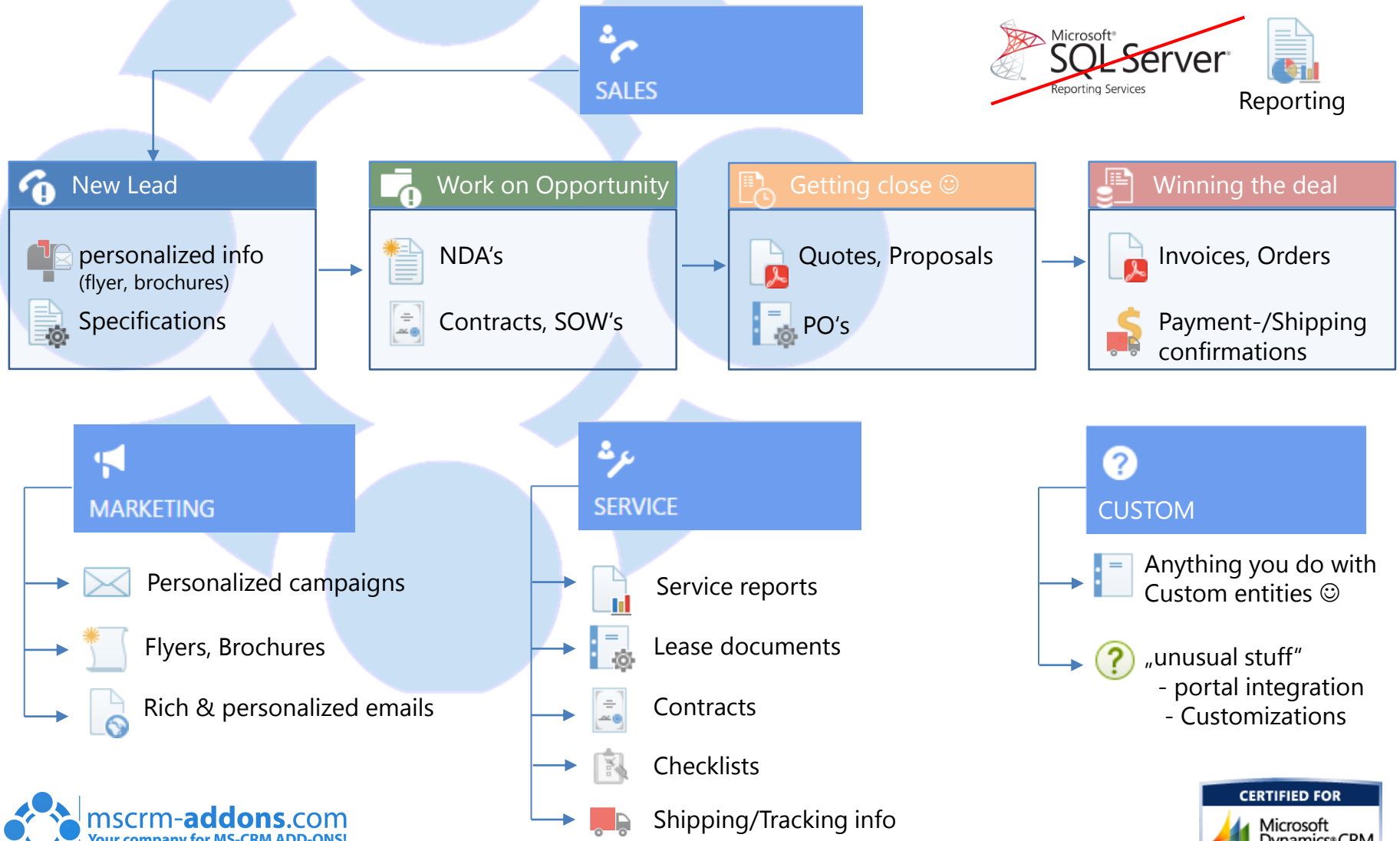
Whats the value?

- **Speed up document-related business operations**
 - Reporting, Accounting- quoting, invoicing
 - Mailing, Printing
 - **Document automation** (MS CRM processes)
- **Templates based on MS Word**
 - Simple template design -NO SSRS-knowledge needed
 - Custom entities & attributes, multi-relation-support
 - Calculations, QR-codes, dynamic pictures...

 Microsoft Dynamics CRM



Typical Application Scenarios?



Telephone Integration (CTI)

Connect your phone system(s) to Microsoft Dynamics CRM

Whats the value?

- **Capture phone calls (incoming and outgoing)**
 - Create phone call activities
 - Know who is calling
- **Simplified dialing**
 - Click2dial
 - Power-dialing via dialing lists
- **Call statistics, Call analysis**
 - Utilizing MS CRM Dashboards

 Microsoft Dynamics CRM



Telephone Integration



RingCentral

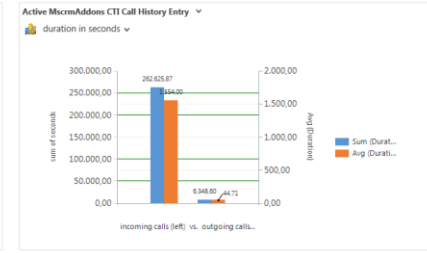
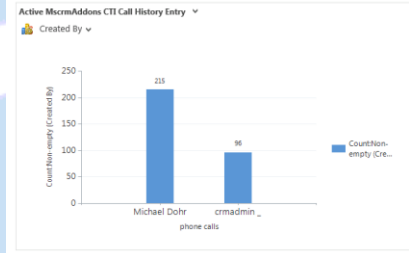
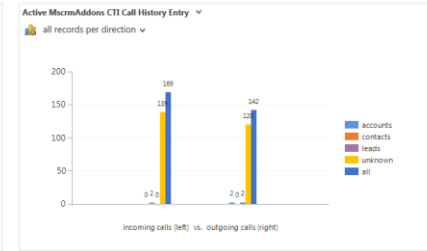
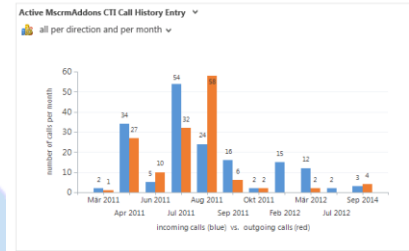
SDK



How it Works

- **TI-Server (CRM solutions)**
 - Click2Dial inside CRM
 - Call statistics, Call analysis
- **TI-Client: Bridge between phone and CRM on user-PC**
 - Perform calls / react on incoming calls
 - CRM-specific operations
 - Create records (activities, leads, contacts, ...)
 - Integrated CRM-Search
 - ...
 - Hosts PowerDialing Lists (for InsideSales/Telemarketing)

Telephone Integration Overview



Telephone Integration 6.16

Find

All | Answered | Dialed | Missed | CRM

Name	Time
Christian Ternek	19:10
316680880	19:10
Luis Bonifaz	18:21
Mike Danseglio	18:19
Aaromba Technologies	11:52
MSCRM-ADDONS.com	11:51
Christian Ternek	11:47
Christian Ternek	18:26
MSCRM-ADDONS.com	14:32
mathoc40	14:26
mdohr	14:25

- Open in CRM
- New Activity
- Create Case
- Create Opportunity
- Create Contact
- Create Account
- Create Lead
- Copy Number
- Remove this Call

Simulate Call

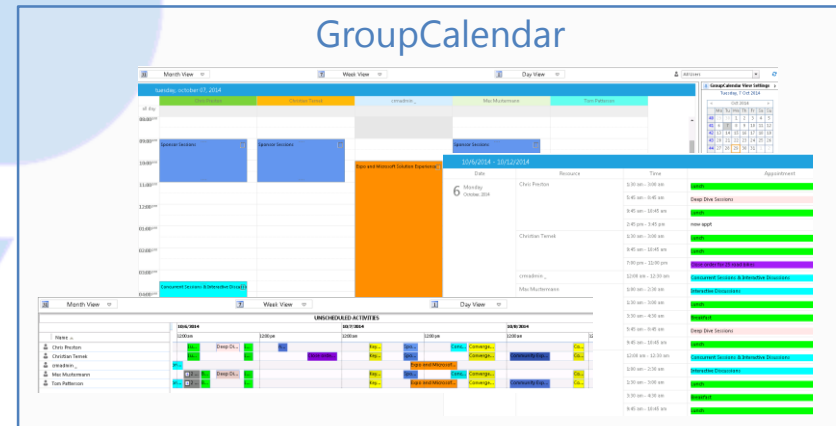
GroupCalendar

Simple scheduling Tool for Microsoft Dynamics CRM

Users – Facilities - Teams - Resources

Whats the value?

- **Effective Team 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
 - ...



How it works

Webresource that can be added to NavBar, Dashboards or embedded to entity forms

The screenshot displays a CRM interface with a table of service activities, an unscheduled activities calendar, and a dropdown menu for resource selection.

Subject	Scheduled Start	Scheduled End	All Day Eve...	Owner	Creat
100 bikes assembly for Discount Bicycle Speci...	9/29/2009 10:00 pm	9/30/2009 10:00 pm	True	Michael Dohr	Micha
Basic tune-up and lubrication	10/28/2009 6:00 pm	10/28/2009 8:30 pm	False	Michael Dohr	Micha
Basic tune-up and lubrication	10/14/2009 1:00 pm	10/14/2009 3:30 pm	False	Michael Dohr	Micha
Basic tune-up and lubrication	10/24/2009 1:00 pm	10/24/2009 4:30 pm	False	Michael Dohr	Micha
Basic tune-up and lubrication	9/30/2009 3:30 pm	9/30/2009 5:30 pm	False	Michael Dohr	Micha

UNSCHEDULED ACTIVITIES

Calendar view showing activities for 10/6/2014 and 10/7/2014. Activities include: Deep Di..., Close orde..., Basic..., Drag me to schedule, and 10/6/2014 7:00 PM.

Resource Selection Dropdown:

- All Users
- All
- Call Center
- Standard
- All Cars
- All Cars & Rooms
- All laptops
- All Laptops and Beamers
- All Meeting Rooms
- Chris Preston
- Christian Ternek
- crmadmin _
- Max Mustermann
- Michael Dohr
- Tom Patterson
- Beamer
- Car 1
- Car 2
- Car 3
- Laptop 1
- Laptop 2
- Laptop 3
- Laptop 4
- Meeting Room 101
- Meeting Room 102
- Meeting Room 103

Navigation Panel:

- Find
- Teams
- Resources
- Users
- Facilities & Equipment

AttachmentExtractor

Replicate or move attachments from MS CRM to MS SharePoint or a fileshare

Whats the value?

- **Reduce Storage costs**
 - Shrink CRM – database
 - up to -60%
 - Huge price difference
 - SharePoint (\$0.20/GB and month)
 - MS CRM (\$ 9.99/GB and month)

Example: 50 GB - \$6000 vs \$ 120! (savings of \$5880)

- **Replicate data**
 - Copy sensitive documents
 - Local availability of files
- **Establish document structure on SharePoint**
 - Easy to search and find (MS Search Server)



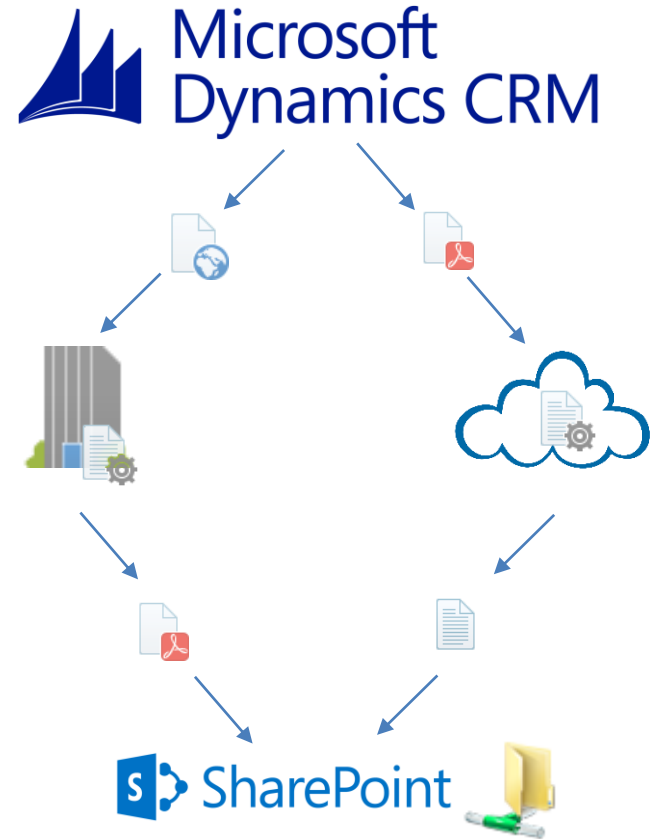
How it works

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 extracted file inside MS CRM
 - **No change in CRM UI!!!**
Users can access all files as usual from within Microsoft Dynamics CRM
- Revert extraction (if necessary)



ActivityTools

Advanced activity-handling in MS CRM web-client

Whats the value?

Increase productivity by providing tools to handle activities more efficiently

• Visualization

- Outlook like- view of activities
- Search, grouping, ...

• Email-options

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



The screenshot displays the Microsoft Dynamics CRM web-client interface. At the top, there is a navigation bar with 'Microsoft Dynamics CRM', 'SALES', 'Accounts', and 'MSCRM-ADDONS.com'. Below this, a toolbar contains icons for 'SMARTBAR DIALOG', 'NEW', 'DEACTIVATE', 'CONNECT', 'ADD TO MARKETING LIST', 'ASSIGN', 'EMAIL LINK', and other actions. The main content area shows the 'Account Overview' for 'MSCRM-ADDONS.com', including account information, website, phone, fax, and primary contact 'Christian Ternek'. A sidebar on the left provides quick access to various activities: Orders, Cases (10), Quotes (3), Activities (57), Notes (5), Invoices (6), and Contacts (5). The 'ActivityPreview' window is open, showing a list of activities with columns for 'Details', 'Date', and 'Time'. The selected activity is an email from 'Michael Dohr' with the subject 'We havent heard from you...'. The email preview shows the sender 'Michael Dohr', recipient 'MSCRM-ADDONS.com', and a PDF attachment 'QUO-01002-W7R4Z9.pdf'. The email body contains a message: 'Dear MSCRM-ADDONS.com, We have not heard from you for a while. We wanted to check in and make sure that you are still having a great experience using our product(s). We have asked Michael Dohr to contact you next week to get your feedback on the product(s) you are currently using and to give you details about our upcoming products. Thank you.'

SmartBar

Enhance CRM- User experience

Navigation – QuickAccess – Related Records – „One-Click“-Actions

Whats the value?

“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,...)
 - ...

The screenshot shows the Microsoft Dynamics CRM interface for the account 'MSCRM-ADDONS.com'. The SmartBar at the top provides quick access to various entities with their respective counts: Orders (59), Cases (10), Quotes (3), Activities (59), Notes (5), Invoices (6), and Contacts (5). The account information panel on the right displays details for MSCR-ADDONS.com, including website, phone, and primary contact Christian Ternek.

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!

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Thank you!