

## AvePoint® Productivity Suite for Microsoft® Dynamics CRM



To stay ahead of today's hyper-competitive business landscape; organizations have to find ways to do more with less without sacrificing the quality of their solutions, services, or customer support. Organizations are looking to technology such as Microsoft Dynamics CRM or Dynamics CRM Online to cost-effectively manage customer data, optimize user productivity, and improve customer relationship management.

Customer interaction must be conducted with ease. Users should be able to quickly locate relevant account information, easily log activities for greater accountability and enforcement of internal policies, and data quality must be ensured.

The AvePoint Productivity Suite for Microsoft Dynamics CRM is designed to improve user productivity and deliver the optimized functionality expected in enterprise-class CRM solutions, including telephone integration for automated activity logging, asset classification, search across all Dynamics CRM assets based on keywords or metadata tags, and quick recovery or roll-back of records that were accidentally deleted or modified. At AvePoint, we create solutions to help businesses collaborate with confidence while growing revenue and impact.

### Key Benefits

1

**Optimize business productivity and quality** in order to focus resources on higher-value activities such as process automation, custom dashboard development, and report creation

2

**Ensure data quality** by restoring altered or deleted business-critical account information to a previous point in time in order to undo unintended or malicious changes

3

**Increase user productivity and management insight into customer relationship maintenance** with automated logging and tracking of phone, Skype®, or Microsoft® Lync call activity, as well as metadata tagging and analysis

4

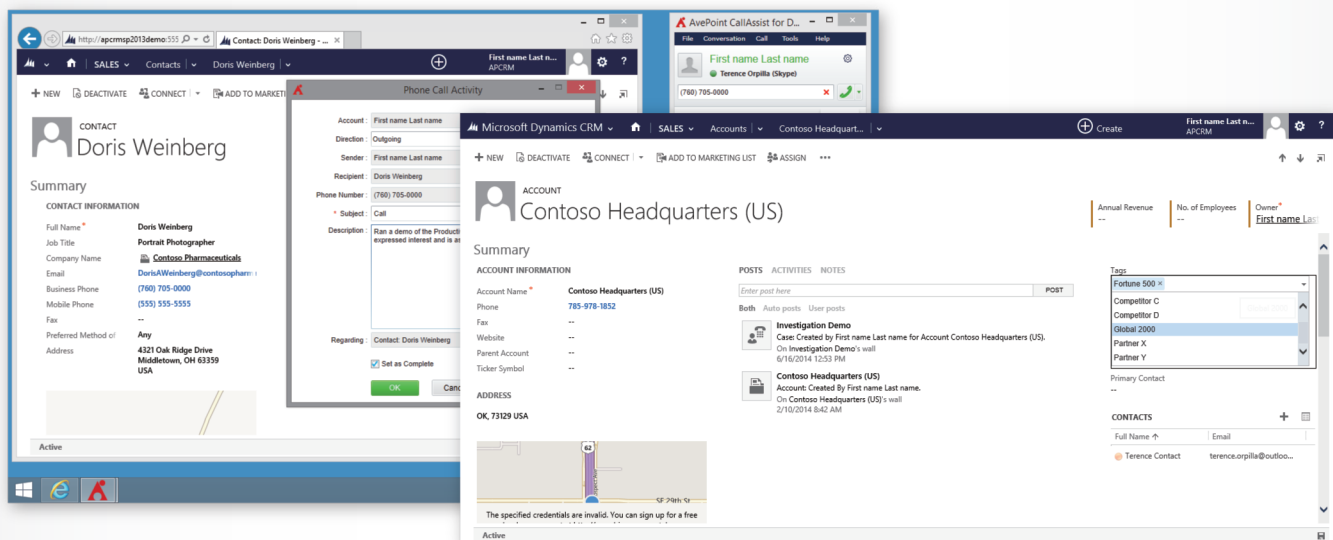
**Enhance in-bound customer service and contact center support** by empowering users with robust search capabilities for relevant CRM data across all CRM assets, including relevant support tickets, licenses, and customer contacts

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### Key Features

- **CallAssist** utilizes Microsoft's Windows Telephony Application Programming Interface (TAPI) to seamlessly integrate Dynamics CRM Online or on-premises editions with corporate telephone systems, including Skype® and Lync, to automatically log phone-based activity for both incoming and outgoing communications
- **CallAssist** supports click-to-dial functionality as well as CRM entity or record location based on incoming caller identification
- **Record Rollback** eliminates any accidental or malicious deletions or modifications to CRM records by taking advantage of native auditing capabilities to maintain optimal data quality
- **SearchAll** enables keyword-based search across all Dynamics CRM datasets – including contacts, leads, campaigns, opportunities, support cases, and accounts – as well as custom created entities through a single interface
- **Tags** enables users to add metadata tags to all Dynamics CRM entity records for easy classification and search
- **Tags** can report on all tagged data across entity sets, enabling organizations to gain greater insight into their CRM assets for improved customer service and business planning
- Supports Dynamics CRM 2011 Online and on-premises editions
- Utilizes only supported Microsoft methodologies and APIs



Enhance user productivity, activity tracking, and information management with the AvePoint Productivity Suite for Microsoft Dynamics CRM.

### Next Steps

Please email [DynamicsSolutions\\_Sales@avepoint.com](mailto:DynamicsSolutions_Sales@avepoint.com) to learn more about AvePoint's solutions for Microsoft Dynamics CRM.

Accessible content available upon request.