AvePoint® TIMELINE

AvePoint® Timeline Pro

for Microsoft® Dynamics CRM

Elegant Interface. Improved Productivity. Microsoft® Dynamics CRM Data at Your Fingertips.

Key Benefits

Improve CRM User Productivity	View or Manage CRM Records On-the-Go	Enhance Customer Communications	Optimize Dynamics CRM Record Management	Full Team Visibility
Customize Timeline Pro views for various roles in your organization to better support users' visibility into, and interaction with, customers or business processes.	Swiftly load, navigate, and browse all activities associated with out-of-the-box or custom records on your mobile device.	Quickly access customer contact information and utilize Microsoft Lync or Skype integration to place calls directly from Timeline Pro.	Mark important actions, events, or milestones within an account and change activity status to better track and log activity cycles. Access the latest activities through Timeline or directly from Dynamics CRM to increase effectiveness, and response times.	Have full visibility of each team member's activities and tasks to monitor activity and improve team member accountability.

Microsoft Partner
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Gold Collaboration and Content

FREE 30-DAY TRIAL

www.AvePoint.com

Making Easy Data Management

AvePoint Timeline for Microsoft Dynamics CRM empowers business users – including sales, marketing, and support staff or management - to be more productive when preparing for customer interaction on the go. With AvePoint Timeline Pro, business users can view all relevant record or account information, gain insight into activity trends, change activity status, add new activities and annotations, and tailor and track presented data to meet their unique CRM requirements. Organizations have more power than ever to customize and configure Timeline Pro to ensure optimal business user productivity.

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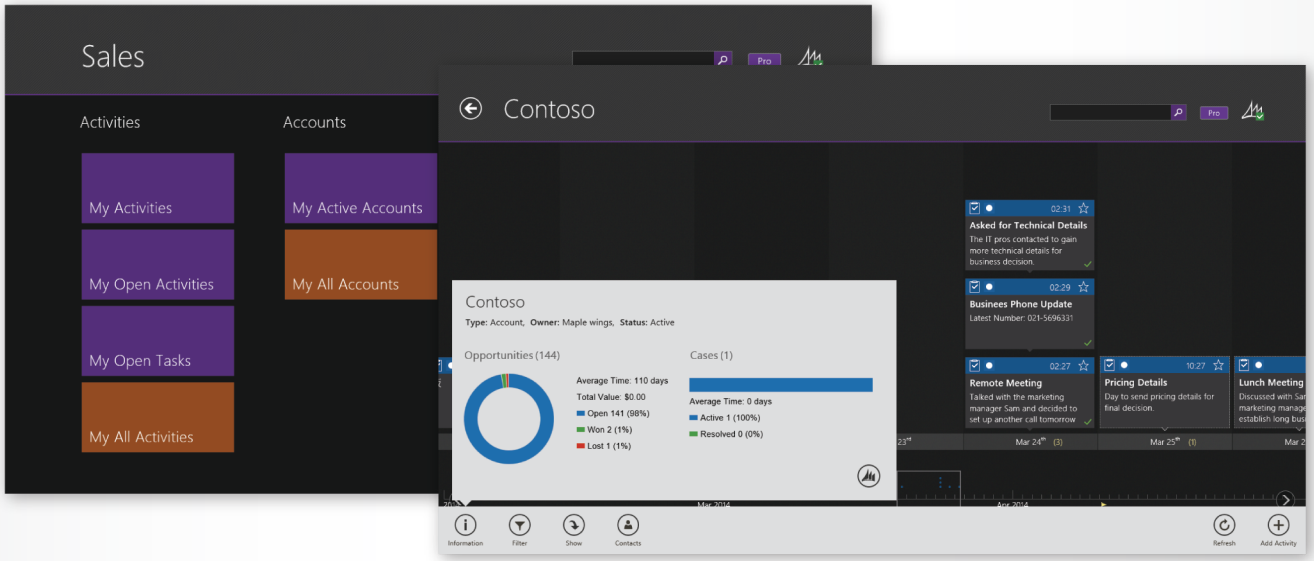
Key Features

- **Timeline View** – Interactive display of all relevant activities and all milestones for CRM accounts and records on a timeline.
- **Detail View** – Displays all record details by drilling down into the graphical timeline, such as last recorded interaction and contact information.
- **Management View** – Allows managers to view the timelines for their individual team members.
- **Personal View** – Grants end users the permission to create their personal views with customizable criteria for easier browsing.
- **Task Management** – Provides a centralized view for users to view all their activities across different records.
- **Annotate** – Flags records (e.g. Activities) as important and provides capability to add notes or comments as well as custom activities to records. Sync annotations back to Dynamics CRM to always access up-to-date record information from anywhere.
- **Update** – Change activity status directly in Timeline to log the latest progress.
- **Launch** – Quickly launches a record in Dynamics CRM directly from Timeline Pro, or launch Timeline Pro from a Dynamics CRM record.
- **Search** – Configurable search for records to view within timelines.
- **Configurable User Experience** – Tailor the data presented in Timeline Pro to meet various organizational roles to support overall customer interaction in addition to account management.



Display relevant information in an integrated interface to meet various business user requirements.

Next Steps

Please contact DynamicsSolutions_Sales@avepoint.com to learn more about AvePoint Timeline Pro for Microsoft Dynamics CRM.

Accessible content available upon request.