AvePoint Solutions for Microsoft® Dynamics CRM:
Optimize User Productivity and Data Quality for your CRM Data

Enhancing the Microsoft® Dynamics Experience
Microsoft Dynamics: The Next Frontier of Collaboration with AvePoint

AvePoint has been on a journey with Microsoft since 2001. As a Depth Managed Microsoft Gold Certified Application Development Partner and Gold Certified Collaboration and Content Partner, AvePoint is a proven leader in developing software solutions that help organizations scale and grow mission-critical social and enterprise collaboration platforms. With its history in Microsoft SharePoint as well as CRM integration, AvePoint is now proud to introduce the next generation of collaboration with confidence with its Dynamics product line, designed to help business professionals manage, protect, and gain insight into their Dynamics data resulting in increased adoption, productivity, feedback, and control. AvePoint is the strategic partner to help organizations worldwide enhance the Microsoft Dynamics experience and allow its end users to collaborate with confidence.

Why Microsoft Dynamics?

When used to its full potential, the Microsoft Dynamics platform is an essential tool for both customer relationship management (CRM) and enterprise resource planning (ERP). For the Dynamics platform to reach its full potential as a management and planning application, though, the business depends on the quality of its data and the complete adoption of the platform. However, this is not always an easy task: a recent article\(^1\) states that the number one cause of incomplete or ineffective Dynamics implementation is the lack of user adoption.

AvePoint’s product suite for Dynamics improves user adoption by transforming your existing Microsoft Dynamics platform deployment from simply a “tool” into a fundamental part of the business, bringing underutilized functionality and information to the forefront of the user experience. AvePoint’s role-targeted, custom purpose-driven interface empowers business professionals with an easy-to-navigate user interface for greater productivity, deeper insight into information, and more control over records. As a result, users spend less time learning the system and attempting to pull the correct reports on data in vain, and more time focusing on completing their day-to-day projects to help meet organizations’ business initiatives.

Improve User Adoption by Increasing Productivity

An essential part of encouraging full user adoption is making the user interface navigation intuitive and subsequently making Dynamics easier to use. AvePoint CallAssist increases end-user productivity by integrating into Dynamics an interface that presents data to the user immediately while eliminating extra clicks. Browse and manage account activity as well as an individual or entire sales team’s opportunities on-the-go with AvePoint’s mobile-ready apps – AvePoint Timeline and AvePoint Pipeline.

- Quickly gain access to on-file customer information when an incoming call triggers CallAssist to immediately display the data, allowing salespeople to instantly address the customer’s need.
- Obtain insight into worker productivity through enhanced tracking and management tools.
- Automatically log a phone call activity as soon as a call is finished – less manual data entry helps solve the garbage-in-garbage-out problem.
- Ensure transparent visibility of all customer interaction with complete end-to-end record tracking of both incoming and outgoing communications.
- Predict individual and team profitability with time adjusted opportunity forecasting.
- Allow sales, marketing, and support teams to track, log, and manage activity from mobile devices through a dynamic timeline view

\(^1\) [http://www.dynamicscrmpros.com/2012/02/crm-user-adoption/](http://www.dynamicscrmpros.com/2012/02/crm-user-adoption/)
Provide Deeper Insight into Data

Microsoft Dynamics offers a goldmine of customer information, but accessing and navigating this information may be overwhelming and cumbersome for users. In addition, making sense of hundreds of activities and records for a single entity can be a daunting task. AvePoint’s Timeline mobile app and SearchAll software empower the user by providing tools that display all activities in a consolidated interface, providing quick and easy ways to add annotations and display a combined view of relevant information pertaining to any account, lead, contact, campaign, case, and opportunity. Users can quickly interpret data and make faster, actionable decisions – less clicking and more producing.

• Show account information and history regardless of how the contact was first made, be it a marketing event, sales call, support case, web ticket, etc. – we give you a complete end-to-end history.
• Empower managers to quickly gain insight and make better business decisions by simplifying reports buildings and queries.
• Review and interpret all records for a given account through one easy-to-understand timeline interface.
• Understand the current status of the most critical accounts by monitoring communication, issue, and sales history.
• Empower mobile data access to sensitive records so that the full record history is always at users’ fingertips but it is protected from those who should not have access.
• Quicken decision making with customizable record fields that can be tailored to the needs of your organization, and data presentation to summarize the most relevant data according to the user’s needs.
• Uncover potential forecast improvements by running test scenarios with adjustments to opportunity close dates and probabilities.
• Gain greater insight into CRM assets with reports across entity sets by tagging and classifying entity records

Enable Better Control over Records

AvePoint understands that the most valuable part of an organization’s business intelligence is the completeness of its records. For example: a single record could be the difference between hitting a quota and losing a customer forever, or customer support losing an email that results in an angry customer. AvePoint Tags helps you find the record you need quickly with easy classification and improved search, and AvePoint Record Rollback gives organizations the ability to selectively undo record changes in CRM, such as record deletions or accidental changes.

With improved control of the Dynamics environment, users have the ability to manage the audit records of items that have had user operations performed upon them. As a result, organizations receive complete control over their Dynamics data.

Next Steps

AvePoint looks forward to supporting you on your journey to enterprise collaboration with confidence using Microsoft Dynamics. If you would like to receive pricing information, please contact DynamicsSolutions_Sales@avepoint.com, or contact your Microsoft or AvePoint representative.

Accessible content available upon request.