Quickbix Documents Suite

Quick business logix for Microsoft Dynamics CRM 4.0

(Now supporting Microsoft Office -2007 / -2010 and
Moss 3.0/4.0 and Sharepoint MOSS 2007/2010 in all combinations)

One-Click Business documents at your Dynamics CRM fingertips!

Quickbix Documents Suite enables you to generate professional business critical documents directly from the menu in Dynamics CRM to Microsoft Word, Excel, Powerpoint and Acrobat Reader.
Forget all 100+ clicks mail merge solutions, this is instant business logics!

You can choose to generate your document directly to Microsoft Office, as a PDF to Acrobat Reader or as an attached PDF to a new email activity, just for you to Send it to your business contacts.
This functionality is available both from a Microsoft CRM select template form and from One-Click buttons.

If you have opened the document in Office (-2007/-2010), just click "Save in CRM" from your Office menu and the document will be secure in an integrated Sharepoint(20007/2010) Document Library or as a Note attachment.
In the same process you can optionally with ONE click, create and send an email activity with your document attached as a PDF file. Works both in IFD and ONPREMISE installations.

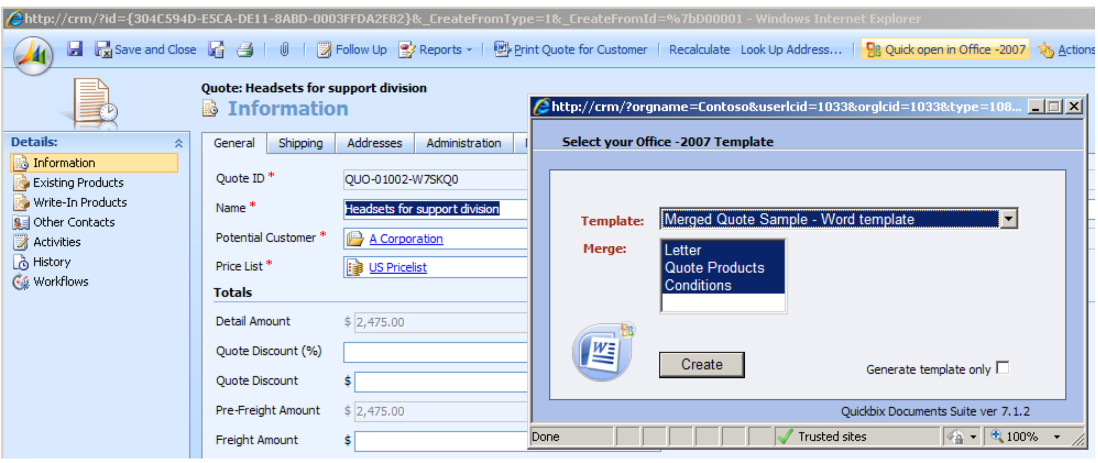
Take control over your CRM documents…

- ✔ Create any business document and send it to the Customer as a PDF in just one click!
- ✔ Save the document to an integrated Sharepoint Library directly from the Office menu!
- ✔ Find all customer documents in a Sharepoint overview directly on the Account form!
- ✔ Making customer documents available to your entire organization through Sharepoint!
- ✔ All Salespersons in the organization uses the same professional templates with the same business critical data, in communication with your customers.

Here's how it's done….

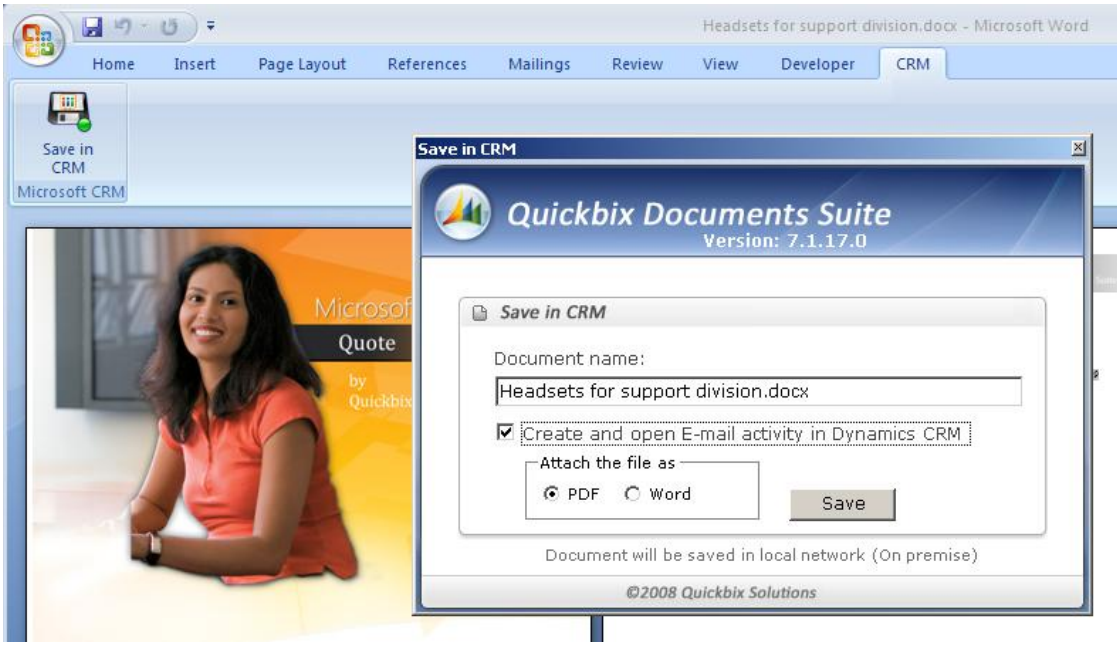
1. Generate document from Microsoft CRM

You can generate your documents from ALL entities in Dynamics CRM, directly from the menu.
It is possible to optionally merge several different documents into one by simply selecting them.
Which documents to merge can also, if wanted, be determined by data from Dynamics CRM.
You have the flexibility to either create a ***One-Click Document Button*** in Dynamics CRM or open our ***Select template form*** to let the user select how to generate it.



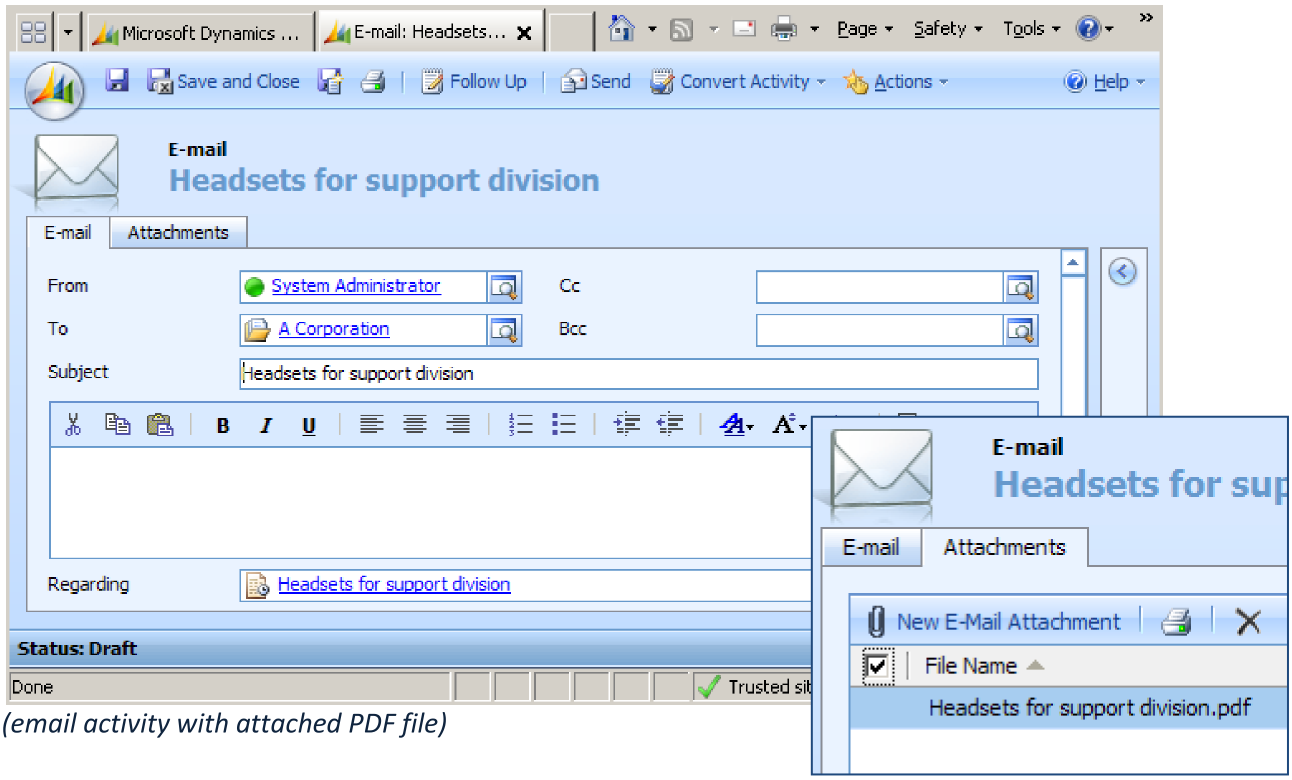
2. Save the document back to Dynamics CRM

Your document will be opened in Word/Excel or Powerpoint for editing and with a CRM menu for saving it back to Dynamics CRM. In the "Save in CRM" dialog, you can name your document and optionally create and open a new email activity with your document attached as a PDF/Office file.



Pressing "Save" with the "Create and open E-mail.." checkbox checked, will, besides saving it to CRM, open a new Internet Explorer window with your email activity pre-filled with information from Dynamics CRM and your document attached as a PDF file…

Just for you to write your message and press "send"!



(email activity with attached PDF file)

Sharepoint integration *(Site & Folder with Metadata or pure Metadata scenario)*

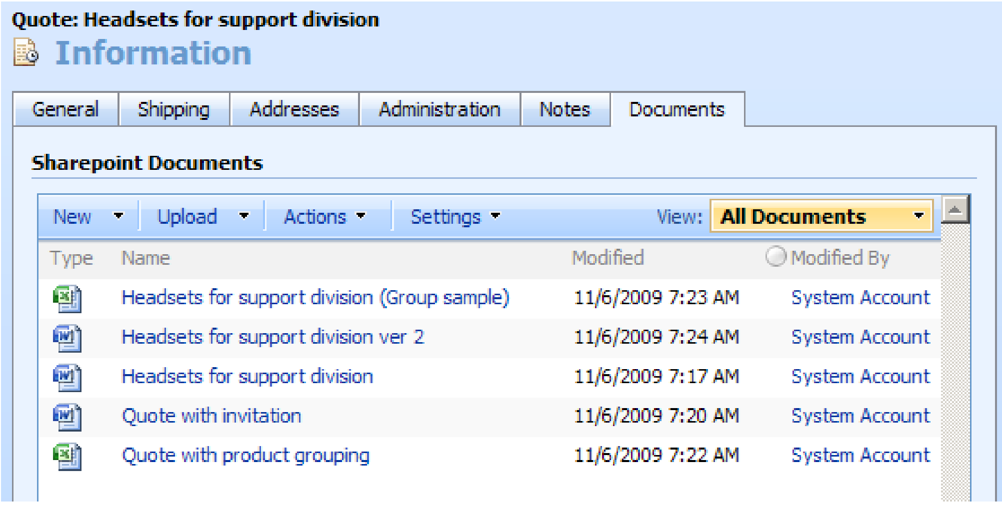
Site & Folder with Metadata scenario

This scenario creates a dedicated Sharepoint Site Document library for each root entity (often Account) in Microsoft CRM. Sub entities (contacts, opportunities, quotes, orders, contracts…) are connected to a folder structure inside this Sharepoint Site. The Sharepoint structures are also easy implemented on existing data in Microsoft CRM by editing a special attribute either by bulk editing from an advanced find or by our Integration Suite.
All generated or imported documents are also tagged with Metadata of your choice for easy access for your entire organization.

Pure Metadata scenario

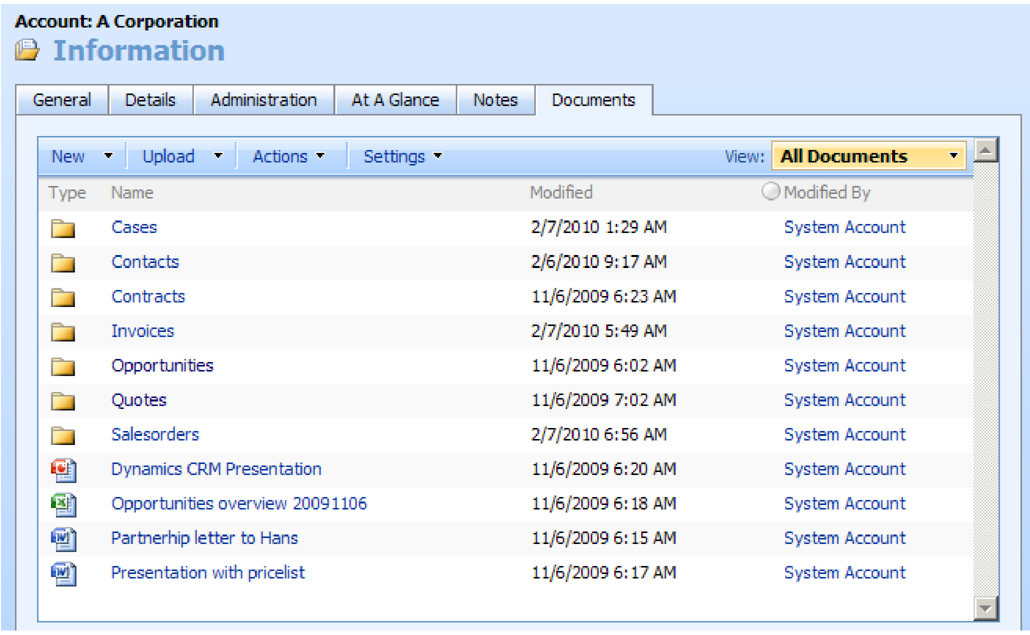
The pure Metadata scenario stores all CRM documents in the same Site document library.
All documents are tagged with Metadata of your choice and then filtered and grouped on each Microsoft Entity Form. This scenario also makes all your generated or imported documents available to your entire organization.

In both scenarios above you see your documents both on the owner entity form and on the parent entity…



(Quote Documents on the Microsoft CRM Quote form)

Besides the benefits of having your documents secured in a Sharepoint Document Library directly on your Dynamics entity form, you'll get a ***Document Overview*** on each Account. All documents are accessible both from the overview and from the entity form:



(Account Document Overview, this looks similar for both Metadata and Folders scenario)

Document Templates

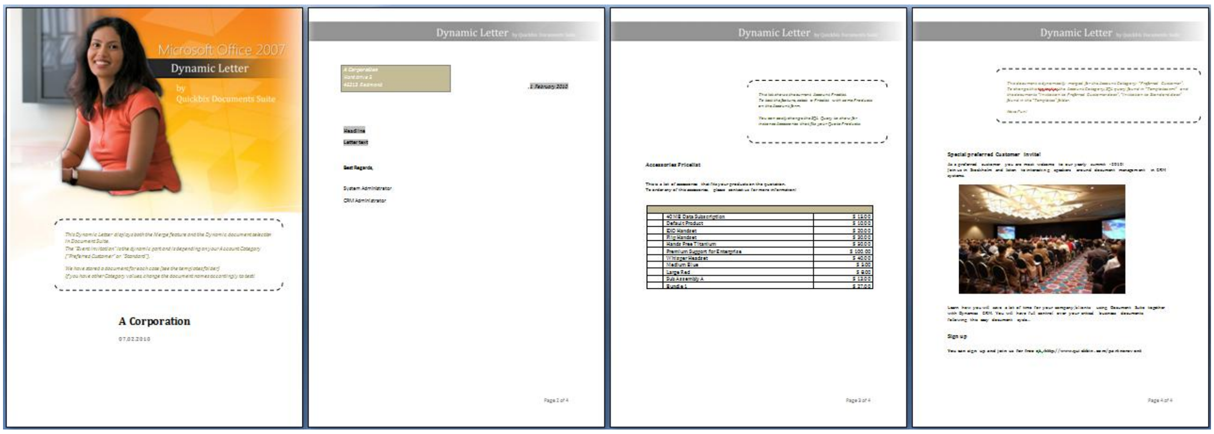
When installing Quickbix Documents Suite you'll get a variety of professional business documents included in the package, all tailor made for the entities in Dynamics CRM.

Some of them shows the possibility to merge different selectable documents into one and others shows the Dynamic data feature, which enables you to let the data in Dynamics CRM decide which documents to be included in the merge.
(It could be a separate invitation to Accounts with the category "Preferred Customer" set or maybe a product brochure included if a certain product is selected for the Quote…)

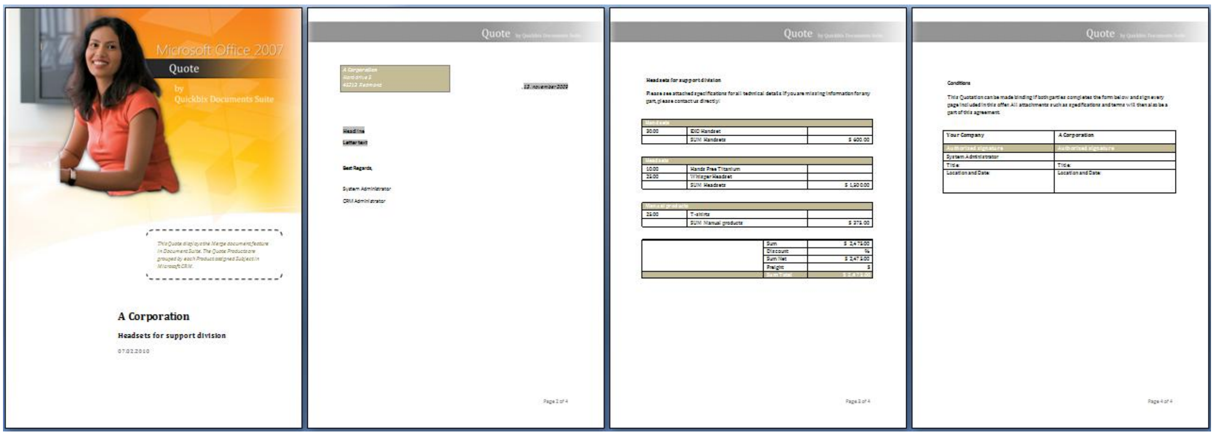
Included are samples for:

Account – Contact – Opportunity – Quote – Sales order – Invoice – Contract - Case

Account sample with merged documents for a front part, a letter part, an account specific pricelist and an invitation depending on customer category. All separate documents with data from Dynamics CRM:



Quote sample with merged documents for a front part, a letter part, quote product list and a contract part. All separate documents with data from Dynamics CRM.:



There are samples in Word, Excel and Powerpoint ready to be used as your business documents templates. It is also possible to use your existing documents with some smaller manual work.

!We are happy to customize your existing business documents to work with our Documents Suite.
Send us some samples (sales@quickbix.com) and we will get back to you with a price estimate.