HOW CAN MICROSOFT INCREASE YOUR PRODUCTIVITY?

Gaining better integration with Microsoft applications

February 21, 2017
Today’s presenter

Drew Wilson
- Microsoft Presales Engineer
- Based in the Dallas, TX office
- Experience evaluating, recommending and designing a vast array of enterprise applications

Dian Taylor
- Business Applications Manager
- Based in the West Palm Beach, FL office
- Experience modeling and optimizing business processes, defining user requirements, and designing configured CRM solutions
We offer a comprehensive scope of technology services, covering IT strategy, application and systems integration, infrastructure and outsourcing.
Agenda

• Dynamics 365 overview
• Integration with Dynamics 365 applications
  – Outlook
  – Exchange
  – Word
  – Excel
  – OneNote
• Other Microsoft integrations
  – SharePoint
  – Power BI
  – Telephone
  – Insights
• Wrap up
• Questions and Answers
DYNAMICS 365
OVERVIEW
What is Dynamics 365?

CRM

ERP
Next generation intelligent business applications

Microsoft Dynamics 365

- Project Service Automation
- Sales
- Customer Service
- Field Service
- Operations
- Marketing + Adobe
Dynamics 365 advantage

Purpose-built
Start with what you need and grow at your own pace

Productive
Familiar tools in the context of your business processes

Intelligent
Built-in intelligence to proactively guide to optimal outcomes

Adaptable
Grow, evolve and transform with modern, extensible platform
INTEGRATION WITH DYNAMICS 365 APPLICATIONS
Type of integrations

Office suite <-> SharePoint

Telephone integration <-> Power BI
OFFICE INTEGRATIONS
Integration with Office applications

- Outlook & OWA
- Exchange
- Word
- Excel
- One Note
Outlook and OWA

- Mail
- Contoso
- Calendar
- People

Inbox - veronicaq@RSMUSFS.onmicrosoft.com - Outlook
Outlook and OWA (cont.)

Office 365 Outlook

- Inbox
  - Clutter
  - Tracking Folder
  - Sent Items
  - Deleted Items
- Dian Taylor
  - Inbox

Camera down

Dian. <dian74@hotmail.com>
Wed 12/21/2016, 9:11 AM
Dian Taylor's

Hello,
We are having an issue with the camera that comes with the alarm system that was installed.

Can someone please contact me?

Regards,
Renee Valdes

Email is tracked

RECEPIENTS

RV

Heine Valdes (sample) (contact)
A. Datum Corporation (sample)
555-0100

ACCOUNT

A. Datum Corporation (sample)

Hello,
We are having an issue with the camera that comes with the alarm system that was installed.

Can someone please contact me?

Regards,
Renee Valdes
### Outlook Tasks

<table>
<thead>
<tr>
<th>Task Description</th>
<th>Start Date</th>
<th>Reminder Time</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call mom</td>
<td>Thu 2/2/2017</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pickup Dogfood</td>
<td>Thu 2/2/2017</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Intro Call regarding Insta...</td>
<td>Wed 2/1/2017</td>
<td>10:30 AM</td>
<td>Wed 2/1/2017</td>
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<tr>
<td>Follow Up Call</td>
<td>Fri 1/27/2017</td>
<td>12:00 PM</td>
<td>Fri 1/27/2017</td>
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<tr>
<td>2nd Follow Up Call with ...</td>
<td>Thu 1/26/2017</td>
<td>8:00 AM</td>
<td>Thu 1/26/2017</td>
</tr>
<tr>
<td>Follow up call with Henry</td>
<td>Tue 1/24/2017</td>
<td>5:30 PM</td>
<td>Tue 1/24/2017</td>
</tr>
<tr>
<td>Follow up with Henry</td>
<td>Tue 1/24/2017</td>
<td>8:00 AM</td>
<td>Tue 1/24/2017</td>
</tr>
<tr>
<td>Follow up with Sandy</td>
<td>Tue 1/24/2017</td>
<td>5:30 PM</td>
<td>Tue 1/24/2017</td>
</tr>
<tr>
<td>Follow up with Greg</td>
<td>Tue 1/24/2017</td>
<td>8:00 AM</td>
<td>Tue 1/24/2017</td>
</tr>
<tr>
<td>Follow up with Greg</td>
<td>Tue 1/24/2017</td>
<td>5:30 PM</td>
<td>Tue 1/24/2017</td>
</tr>
<tr>
<td>Follow Up regarding Kell...</td>
<td>Mon 1/23/2017</td>
<td>8:00 AM</td>
<td>Mon 1/23/2017</td>
</tr>
<tr>
<td>Introduction Call Johann...</td>
<td>Sun 1/22/2017</td>
<td>10:54 AM</td>
<td>Sun 1/22/2017</td>
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<tr>
<td>Intro Call regarding Kelly..</td>
<td>Sat 1/21/2017</td>
<td>4:14 PM</td>
<td>Sat 1/21/2017</td>
</tr>
<tr>
<td>Intro Call regarding Bond..</td>
<td>Sat 1/21/2017</td>
<td>4:14 PM</td>
<td>Sat 1/21/2017</td>
</tr>
<tr>
<td>Intro Call regarding New...</td>
<td>Sat 1/21/2017</td>
<td>4:14 PM</td>
<td>Sat 1/21/2017</td>
</tr>
<tr>
<td>Intro Call regarding New...</td>
<td>Sat 1/21/2017</td>
<td>4:14 PM</td>
<td>Sat 1/21/2017</td>
</tr>
<tr>
<td>Intro Call regarding Bond..</td>
<td>Sat 1/21/2017</td>
<td>4:14 PM</td>
<td>Sat 1/21/2017</td>
</tr>
</tbody>
</table>

### CRM Tasks

- Call mom
- Pickup Dogfood

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DEMO
Outlook integration
## My Open Opportunities

<table>
<thead>
<tr>
<th>Topic</th>
<th>Est. Close Date</th>
<th>Est. Revenue</th>
<th>Contact</th>
<th>Account</th>
<th>Probability</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 orders of Product SKU A03965 this summer (sample)</td>
<td>1/7/2016</td>
<td>$27,484.80</td>
<td>Susanna Rubble</td>
<td>Sales, Inc.</td>
<td>Warm</td>
<td>4</td>
</tr>
</tbody>
</table>

### QUOTE

**To:**

Liberty, Inc.

1234 Main St.

Dallas, TX 75201

**From:**

RSM

1555 Palm Beach Lakes Blvd.

Palm Beach Gardens, FL 33410

**Phone:** 561-405-6406

**Date:** May 21, 2016

<table>
<thead>
<tr>
<th>Item #</th>
<th>Description</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Price</th>
<th>Discount</th>
<th>Sub Total</th>
</tr>
</thead>
<tbody>
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<td>100010</td>
<td>123456789</td>
<td>1</td>
<td>$100.00</td>
<td>100</td>
<td></td>
<td>$100.00</td>
</tr>
<tr>
<td>200000</td>
<td>987654321</td>
<td>2</td>
<td>$50.00</td>
<td>100</td>
<td>10%</td>
<td>$90.00</td>
</tr>
<tr>
<td>300000</td>
<td>12345</td>
<td>3</td>
<td>$20.00</td>
<td>60</td>
<td></td>
<td>$120.00</td>
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<tr>
<td>400000</td>
<td>65432</td>
<td>4</td>
<td>$10.00</td>
<td>40</td>
<td>15%</td>
<td>$34.00</td>
</tr>
</tbody>
</table>

**Total:** $250.00

**Due Date:** 30 days from date of invoice

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**SANDBOX**

- **NEW**
- **EDIT**
- **DELETE**
- **CLOSE AS WON**
- **CLOSE AS LOST**
- **REOPEN OPPORTUNITY**
- **SEND DIRECT EMAIL**
- **ASSIGN**
- **SHARE**

**TABLE TOOLS**

- **EMAIL A LINK**
- **FOLLOW**
- **UNFOLLOW**
- **RUN WORKFLOW**
- **START DIALOG**
- **RUN REPORT**
- **EXCEL TEMPLATES**

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**Word Templates**

- **Create Word Template**
- **Export to Excel**
- **Import Data**
- **Chart Pane**
- **Opportunity Summary**
- **Data Insight**

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DEMO

Word and Excel templates
OTHER DYNAMICS 365 INTEGRATIONS
Power BI – Business analytics
Caller recognition, click-to-dial and power dialing
CALL DASHBOARD

- Calling Time (Hours) per Rep and Month
- Top 5: Call Time per Rep
- Top 5: Calls with Contacts (Hours)
- Number of Calls per Rep and Month
- Top 5: Number of Calls per Rep
- Top 5: Lead Calls (Hours)
Microsoft Corporation

Industry: Information Technology
Phone: +1 425 882 8080
Fax: 1-425-796-7329
Website: http://www.microsoft.com

**Company Profile**
- Annual Revenue: $85,120,000,000.00
- No. of Employees: 112,000
- SIC Code: 7372
- Ownership: Public
- Open Deals: 0
- Open Revenue: $0.00

**Description**
Microsoft Corporation, an American multinational technology company headquartered in Redmond, Washington, that develops, manufactures, licenses, supports, and sells computer software, consumer electronics and personal computers and services. Its software products include the Microsoft Windows line of operating systems, Microsoft Office office suite, and Internet Explorer and Edge web browsers. Its flagship hardware products include the Xbox game consoles and the Microsoft Surface tablet lineup. It also offers cloud-based solutions that provide customers with software, services, and content over the Internet by way of shared computing resources located in centralized data centers. It also designs and sells hardware, including PCs, tablets, gaming and entertainment consoles, phones, other intelligent devices, and related accessories.

**Insights**
Microsoft Corporation

**Research & Development**
- Tateo’s Vital Data: Tesla Inc (TSLA), Gilead Sciences, Inc (GILD) and Microsoft Corporation (MSFT... InvestorPlace.com - February 14, 2017

**Partnerships**
- Nutanix Announces Extended Partnerships with Six Industry Leading SaaS Innovators
- TicketTech.com - February 14, 2017

**Expanding Operations**
- Nutanix Announces Extended Partnerships with Six Industry Leading SaaS Innovators
- TicketTech.com - February 14, 2017

**New Offerings**
- INSIGHTS
- RESEARCH
- FIND CONTACTS
- FAMILY TREE

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WRAP UP
Contact information for today’s presenters

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