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FACT
SHEET
d.velop connect for
Microsoft Dynamics 365

Seamless integration in Sales.

Simple, sensible and transparent

Without the right tools, it can be very difficult to find all the information that a company knows about a customer. Bring time-consuming searches to an end with d.velop connect for Microsoft Dynamics 365. This d.velop solution lets you display your documents in a useful and transparent way in Microsoft Dynamics 365 Sales.

Researching and accessing documents

No matter which d.velop Enterprise Content Management system you work with – d.3ecm or ecspand – d.velop connect for Microsoft Dynamics 365 lets you view your archived data within its actual context directly from Microsoft Dynamics 365 Sales. Of course, it also lets you access this data – regardless of the source system used to enter the documents in ECM. The customer form, for instance, lets you view all the invoices, quotations, delivery notes and contracts you have for a customer.
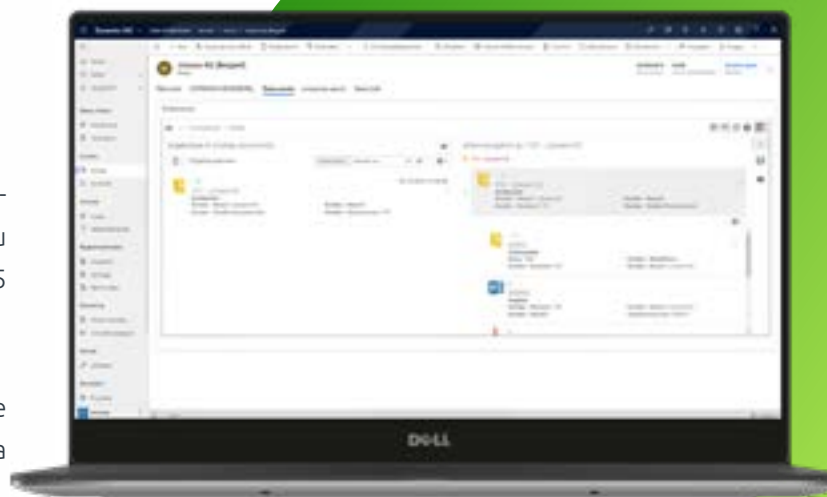
Archiving documents

Naturally, as well as context-based visualization of archived documents, the d.velop add-on also lets you archive documents through Microsoft Dynamics 365 Sales.

Existing attributes are automatically determined from the CRM context, meaning that the task of maintaining data is much less arduous for your staff.

Designing processes

One challenge that plays a major role in today's corporate environment is the integration of software solutions into existing or new business processes. For instance, the automated transfer of your CRM documents to your ECM system opens up many opportunities for designing digital processes and initiating workflows in a simple way.

Context-sensitive integration of the corresponding dossier; for instance, a comprehensive customer dossier containing all the important documents, including quotations, written correspondence and invoices.

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Increasing user satisfaction

Simplify digital archiving for business documents with the d.velop add-on, for efficient information management throughout your business!

Benefits

- ✔ Context-based visualization of archived documents

- ✔ Automatic and/or manual document archiving through Microsoft Dynamics 365 Sales

- ✔ Easy to operate with minimal training costs

- ✔ Authorization concept for the ECM systems applies

- ✔ Relieves the burden on the CRM database by relocating documents to ECM

- ✔ Integrates flexibly into all CE entities

Designing digital business processes

Accelerate business transactions

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The d.velop group develops and markets software for the complete digitization of business processes and industry-specific procedures, and advises companys in all areas of digitization. In addition to its established ECM portfolio of services relating to document management, archiving and workflows on mobile apps as well as standardized and custom SaaS solutions, the software manufacturer has also expanded to offer managed services. These services include sophisticated compliance management to provide legal certainty and ensure compliance with all statutory regulations.

d.velop helps businesses and organizations reach their full potential by offering digital services that connect people to each other and that simplify and retool procedures and processes.

A strong, global network of around 360 specialized partners ensures that d.velop Enterprise Content Services are available worldwide.

d.velop products – whether on premises, in the cloud or in a hybrid form – are now used by more than 12.200 customers across multiple industries with over 2.8 million users; these customers include Tupperware Germany, eismann Tiefkühl-Heimservice GmbH, Parker Hannifin GmbH, Nobilia, Schmitz Cargobull, FingerHaus GmbH, the city of Wuppertal, Basler Versicherungen, DZ Bank AG, Saarland University Medical Center and Greifswald University Hospital.

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