

# DYNAMICS 365 CE AND SHAREPOINT BUNDLE



## REIMAGINE CUSTOMER RELATIONSHIPS WITH DYNAMICS 365 CUSTOMER ENGAGEMENT (CE) SALES & SHAREPOINT BUNDLE FROM EXIGO TECH

Providing people with collaborative tools that are easy to use, easy to access, and work well together is the key to increasing productivity. By integrating Microsoft Dynamics 365 CE with Sharepoint, you can unlock this power of productivity. The synergy provided by these two solutions together lets you drive personal engagement with customers and drives sales with easy access to business intelligence and team collaboration for better decision making.

## UNDERSTAND THE BUNDLE

Microsoft SharePoint is a highly customisable web-based business platform that enables remote working in a collaborative environment, where as Microsoft Dynamics 365 CE is designed to help you manage customer relationships by centralising customer information, streamlining processes, providing analysis, and enabling responsive customer service. This collaboration and CRM bundle together is built to enhance the efficiency of your Sales team and help teams achieve growth targets, generate leads, increase account value, sell effectively, sell as a team and win more customers.

## BUNDLE INCLUDES



Microsoft  
Dynamics 365  
Sales



SharePoint  
Sales

### Build Customer Relationships

Manage customer from multiple channels in a single dashboard and empower teams with intelligent insights.



### Personalized Customer Experience

Gain a complete view of your customers to provide customized solutions to them.



### Improve Data Security

Restrict unauthorized users from accessing private document and sensitive data.



### Automate Business Process

Manage your entire business process and automate libraries, sites, workflows, and lists using Sharepoint.



### Make Better Decisions

Drive data-driven campaigns to retain and grow your customer base.



### Better Collaboration

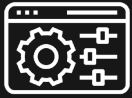
Enable direct document sharing, authorization rights to access document across a single platform.



# ADVANTAGES OF THE BUNDLE

Apart from the features mentioned, Sharepoint and Microsoft Dynamics sales also comes with their own set of benefits.

## DYNAMICS 365 SALES



Configure of the box functionality



Design Quick Forms



Manage your day-to-day activities



Track led to invoice journey of your customers



Inventory Management



Easy integration with outlook

## SHARE POINT



Restrict document sharing with in the team



Access document form anywhere in cloud



Crete dynamics/ pre-defined document libraries



Manage customer's document easily on share point online



Customise them for your share point library

## OVERALL BENEFITS TO YOUR BUSINESS

- Enable compliance by specifying security settings that comply with regulations at every checkpoint.
- Save your invoices automatically to SharePoint document library for future references and safekeeping.
- Access and manage documents anytime anywhere in the cloud and keep track of your data.
- Make your daily tasks easy through business intelligence and automation.
- Leverage secure management to protect your company data, assets and staff.
- Collaborate with team members and share documents securely.
- Control and restrict user access with permissions to secure your customers data.

## TECHNOLOGY USED



Microsoft Dynamics 365 Sales



Power Automate



PowerShell

Interested in the combined power of Sharepoint and Dynamics 365 CE Sales?

Let **Exigo Tech** help you implement solutions tailored to your business needs.