

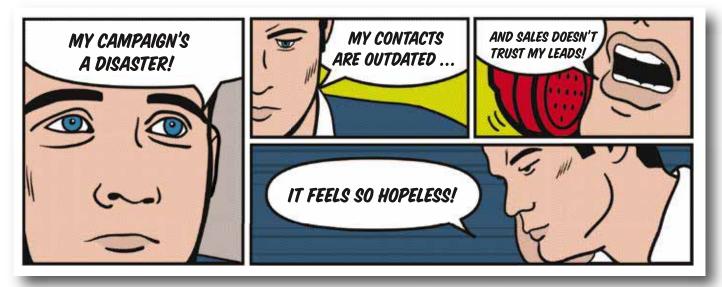
## **Experience It**Everybody's Talking

## Where **Great Ideas** Come **Together**

THE MOST POPULAR



Somewhere in CRMville ...



## Don't Feel Hopeless: D&B360 for CRM Turns You from Zero to Hero!

With D&B on your side, you can wipe dirty data clean, perfect your segmentation, bring sales and marketing together, and leap tall buildings in a single bound!

OK, maybe not the leaping part, but you can acheive:

- · Better prospecting: Find new prospects at all levels in an organization.
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- Data enrichment: Segment with key data points on businesses and contacts
- · Lead form enrichment: Shorten web forms and enrich inbound leads

Be a hero. Request a free CRM analysis at www.dnb.com/msdcrm



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Q4 2014

www.crmug.com



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Please tell us your favorite article or topic from this issue. Share your thoughts on Twitter **#CRMUG.** 



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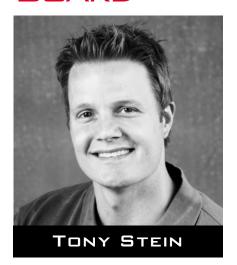
## The places you'll go with mcaConnect

The journey starts at Convergence 2015 Atlanta





#### THE WOW FACTOR: GET ON BOARD



RMUG® Summit 2014...in a word...wow! If you haven't yet experienced Summit, you're missing out. While I may be biased about the greatest Microsoft Dynamics CRM community event of the year, it is supported by User feedback and data. As a Microsoft Dynamics CRM Customer, I'm very honored to be part of a fantastically supportive community where the common goal is to very simply help one another in maximizing your investment with Microsoft Dynamics CRM and increasing User adoption. This applies to companies of all sizes and any roles that touch or utilize Microsoft Dynamics CRM, whether smiling and dialing as an inside sales representative or extending the environment as a developer.

CRMUG is the foundation and association that supports and conducts Summit, but the real and true value comes from the engagement, learning, and support of all participants, especially the 120 session speakers who ultimately delivered and shared their expertise, insight, and value to fellow Users. Those speakers achieved a 4.52 overall satisfaction rating on a 1-5 scale, with 5 being "Excellent". Ninety percent of respondents stated their overall event experience was either excellent (53 percent) or above average (37 percent). Ninety-four percent of respondents said their meeting objectives were met, and 97 percent said they would recommend CRMUG to their peers. Additionally, the first-ever CRMUG awards honored five CRMUG All-Stars, a Chapter Leader of the Year, and a Chapter Location of the Year. Plus, CRMUG Academy Black Belts were granted to those achieving the status of Administrative Black Belt.

These comments from CRMUG Summit attendees support my excitement:

- » I am always impressed with CRMUG Summit. Everyone is friendly and helpful, and there truly is a spirit of community.
- » Thanks again! This is a great effort and benefit for all of us especially us "admins on an island". CRM is tricky to get our own tribes in line with, and this content helps in many ways. Summit provides access to so many great people to meet, learn from, and share war stories and efficiencies with. Keep up the great work!
- » Summit is a great learning experience, plenty of networking opportunities, and very informative sessions.
- » Gained a LOT of various level information that I can implement at the office.
- » My objectives were to continue my knowledge of CRM as well as extending CRM, as well as User adoption and management sponsorship. All of these topics were addressed from multiple points-of-view and topics.
- » Over-exceeded as I knew it would...awesome...my head is swimming with new things!!

Our team and others across CRMUG will continue to bring you great things throughout 2015, including virtual and localized learning via our webinars, Academy offerings, chapter meetings, and more. Mark your calendar now for CRMUG Summit 2015, October 12-16 in Reno-Tahoe. I guarantee you'll be wowed.

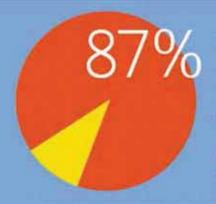
Here's to a great start in 2015!

Tony Stein CRMUG Director



## **CONNECT with your GUSTOMERS**

and drive your web engagement strategy



of customers are willing to pay more for a better customer exerience Providing a strong, online, self-service tool to your customers is an importanat part of your business

### Connect. Collaborate. Support. Manage. Engage.







Support



Training



Community



Finance



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Knowledge Base



User Management

#### CRM VERTEX PORTALS FOR MICROSOFT DYNAMICS CRM









crmvertex



## events

The event calendar on www.crmug.com and the weekly CRMUG\* Event Guide are your best sources for the latest CRMUG event information as this list is subject to change. Events are added weekly, so check back often and get registered for the next exciting CRMUG event.

#### CRMUG SUMMIT 2015

#### October 14-16 | Reno, Nevada

www.crmugsummit.com/reno

#### **WEBINARS**

**January 7 -** OneSource New Admin Series: The Basics of Workflows in Microsoft Dynamics CRM

**January 8 -** OneSource End User Series: How the Road Warrior Saves Time with Mobility and Microsoft Dynamics CRM

**January 13 -** OneSource New Admin Series: Adminimizing Your CRM

**January 13 -** OneSource End User Series: Power BI for the End User

**January 15 -** OneSource End User Series: Using the Service Calendar in Microsoft Dynamics CRM (Part 1)

**January 20 -** OneSource New Admin Series: Not Your Mama's Mail Merge

**January 21 -** OneSource End User Series: Using the Service Calendar in Microsoft Dynamics CRM (Part 2)

**January 22 -** OneSource End User Series: Best Practices in Using Knowledge Base and SLAs in Microsoft Dynamics CRM

January 27 - OneSource New Admin Series: Panel of New CRM Administrators

**January 29 -** OneSource End User Series: 50 tips in 50 Minutes for the End User

#### CHAPTER MEETINGS

For a complete list of chapter meetings in your area, please visit www.crmug.com and click on "Learn & Engage" and then "Attend a Local Meeting".



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#### Convergence 2015

Atlanta, Georgia March 16–19, 2015

#### **Register Now**

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#### **SUMMIT RECAP**

#### **Ignite Leadership Training**

- » Tuesday, October 14
- » All-day training, keynote speakers, and roundtable discussion
- » Valuable networking and best practices for chapter meetings
- » 50-70 chapter leaders from all User Groups
- » Guest speakers: Andy Hafer, Hal Howard, and Chris Flmore

#### **Chapter Luncheon**

- » More than 2,800 attendees
- » Local networking

#### **Overall**

- » Connected with 120+ chapter leaders
- » Many new chapters popping up
- » Contact us to join the leadership team or launch a new chapter in your area

## **CRMUG Chapter Program ANNUAL SPONSORS**

Thank you...



## Chapter of the Year KANSAS CITY

#### **Chapter Leaders**

David Merdian, *Commerce Bank*Laura Mortick, *Waddell & Reed*John Ross, *YRC Freight*Elizabeth Handley-Bauer, *Commerce Bank* 

Pictured left to right: Onika Allen (CRMUG chapter director), Laura Mortick (chapter leader), John Ross (chapter leader), Laura Hoverson (CRMUG program coordinator), and Tony Stein (CRMUG director)





#### **CHAPTER Community Pages**

Join your chapter to network with Members in your area and hear the latest about upcoming chapter meetings and events.

www.crmug.com/chapter

#### Chapters to LAUNCH



#### **Europe**

Ireland, Spain, Italy, and Germany



#### **United States**

Maryland (Baltimore) and New York (Albany)





InsideView®





#### Blake Scarlavai

development principal

Sonoma Partners

Bscarlavai@ sonomapartners.com Primary area of expertise:

Development

What gets you most fired up about Microsoft Dynamics CRM?

The flexibility of being able to easily create customizations with a robust API behind the scenes that allows us to extend CRM in powerful and creative ways.



#### Carsten Groth

Microsoft Dynamics **CRM MVP** 

FastLeanSmart

Mscrm@live.de

Primary area of expertise:

CRM development

What gets you most fired up about Microsoft Dynamics CRM?

Like Legos, it's flexible to fit your individual needs.



#### Christopher Cognetta

director, center of excellence

Microsoft Dynamics **CRM MVP** 

Tribridge

Chris.cognetta @tribridge.com

Primary area of expertise: Infrastructure architecture

What gets you most fired up about Microsoft Dynamics CRM?

They explosive growth of the product and feature set, which allows us to solve many complex business issues.



#### George Doubinski

technical director

Microsoft Dynamics CRM MVP

AlexaCRM

George.doubinski@ alexanders.net.au Primary area of expertise:

All things difficult in Microsoft Dynamics CRM

What gets you most fired up about Microsoft Dynamics CRM?

Coming from the developer's background, my immediate answer to any problem in CRM used to be Visual Studio and code. Over the years, I started appreciating the power of CRM, and these days, the perfect solution includes only the absolute minimum amount of code, if any. Fortunately, with every release, Microsoft Dynamics CRM makes it easier and easier!



#### **Gustaf Westerlund**

CTO, MVP

CRM-Konsulterna

Gustaf.westerlund@ crmkonsulterna.com Primary area of expertise:

Solution architecture

What gets you most fired up about Microsoft Dynamics CRM?

Seeing Customers really grasping the concept of CRM, breaking down the barriers between departments, sharing information, and seeing the big picture of what they are doing. This usually happens when they start working with the Outlook client to track activities, and when Microsoft Dynamics CRM really becomes the force multiplier of their organization as each person's productivity increases.



#### Joel Lindstrom

solution architect

Microsoft Dynamics CRM MVP

Hitachi Solutions

Jlindstrom @hitachi-solutions.com Primary area of expertise:

Requirements gathering, design, configuration, scripting, integration, training, and reporting

What gets you most fired up about Microsoft Dynamics CRM?

I'm really excited about Microsoft Dynamics CRM Mobile and using it to solve challenges for Users.



#### Scott Sewell

solution architect

Microsoft Dynamics CRM MVP

Hitachi Solutions

Ssewell @hitachi-solutions.com Primary area of expertise:

Delivering CRM implementations that Users can use and actually love through obsessive attention to data quality and the "fit & finish" of the delivered User interface

What gets you most fired up about Microsoft Dynamics CRM?

Microsoft Dynamics CRM projects are exciting because successful implementations help businesses promote, communicate, and accomplish their core mission. The power and flexibility of the platform make it easy to be responsive to Customers' needs and the evolving requirements of their organizations.



Entry level accounting software too small?

Enterprise financial systems too **BIG**?





Welcome to accounting software that fits *just right*.

## **c**<sup>t</sup>unnect

The powerful, flexible, easy-to-use, secure, customizable, affordable, and already integrated accounting software for Microsoft Dynamics CRM 2013.







Welcome to the new Members who have invested in CRMUG® User and Partner membership this year! Each new Member adds value not only to their own organization, but also to the entire CRMUG community as they share their knowledge and experiences.

#### NEW USER MEMBERS

Advent International

Barton BEP

BGE Home Blendtec

British School of Outdoor

Education

Cnext

Diamond Drugs, Inc.

District 19 CSB

FEI Company

Fetzer Institute

Flo-Tech

GPC Systems, Inc.

Grupo Staff Hempel A/S

Hiland Partners

HNTB

ICM Inc

**IDEWE vzw** 

IEMA

Inpro

International Foundation of Employee Benefit Plans

KBC Bank

LibertyPower Corp

Limarc

Martin Sprocket & Gear, Inc.

MICA

Mosaic Sales Solutions

National Institute of Construction

Management and Research

(NICMAR)

Norwest Equity Partners

Partenamut

Peterson Farms Seed

Physician Partners of America

Picanol NV

Piedmont Plastics

**PSW Global Solutions** 

**Quadrant Communications** 

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Skills Development Scotland

Spectra Logic

The Alliance

Transics International

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vesp bvba

Viking Masek

WaterAid

#### **NEW PARTNER MEMBERS**

Alam Inc DQ Global

CoCENTRIX Perceptive Software, Inc



#### A Few of our Favorite Tips

by Brad Koontz and Joel Lindstrom

In a holiday spirit, these are a few of our favorite tips from the "50 Tips in 50 Minutes" at CRMUG® Summit:

Before forklifting legacy data into Microsoft Dynamics CRM, ask if the data is actionable data or reference data? Just because you want to present data to Users doesn't mean that the data has to live in Microsoft Dynamics CRM. If data is actionable, it drives business processes.

Know the performance With the release of Service Pack 1 for Microsoft Dynamics CRM 2013, Microsoft has introduced an analyzer to track performance on form loads. To take advantage of this feature, open a form on Microsoft Dynamics CRM, and then using your keyboard, select Ctrl + Shift + Q to view the performance analyzer. To activate this

utility, choose Enable on the utility, and then using F5, refresh your CRM form; the utility will close, displaying normal behavior. Once the form has refreshed, select Ctrl + Shift + Q again; this time the utility will display showing the performance of the form load.

Use the "Shortcuts" area in Outlook 2013. In order to add Microsoft Dynamics CRM folders to Outlook Favorites in previous versions of Outlook and Windows, it was sometimes necessary to modify the registry. Unfortunately, that trick does not work with Windows 8; dragging and dropping non-Outlook items to Favorites is not allowed. We had to come up with

another method to put commonly used CRM items in a designated, easy-to-access folder. The following process is specifically related to Outlook 2013:

- » First, we utilized the Shortcuts area, not the Favorites. Shortcuts in Outlook 2013 are located in the bottom left navigation area. (Read about navigating to Shortcuts at http://www.pcmag.com/ article2/0,2817,2387047,00.asp).
- » Right-click on Shortcuts and New Shortcut Group. Name your group CRM or whatever you call you system.
- » Right-click on CRM and Add New Shortcut.
- » Navigate to the CRM folder you would like a shortcut to.
- » Voila! And what's even better, you can add your go-to Outlook items and create a true personalized experience that cuts out the clutter.



Microsoft **Dynamics CRM** data archival strategies: common question asked during implementation is what practices around archival for historical data? Our first recommendation is Remember that the value of CRM is directly related to the data in CRM. Having historical data in CRM and discovering relationships between that data can give you valuable insights into your Customer base.

If you archive too much data, you limit the usefulness of CRM. So if disk space is not a premium, and there are no overriding business policies that dictate data be removed from CRM, our recommendation

is to leave archival data in CRM, but deactivate it so it does not appear in your active record views. Inactive records can be found by viewing the inactive records view or using Advanced Find, but they will not appear in standard active record views. (Learn more at http://blog.customereffective.com/blog/2014/03/microsoft-dynamics-crm-data-archival-strategies.html)

5

Simple business card capture using Microsoft Dynamics CRM 2013: We often run across the need to do a simple business card capture with a mobile device and have those captures sync into Microsoft Dynamics CRM. Using some popular mobile apps along with Microsoft Outlook, this can be done in a few simple steps:

» First, get an app. We used an iPhone/iPad app called ScanBizHD. It is available in iOS, Windows and Android. It costs \$9.99 from any app store. It should not require any additional set-up other than installation. The paid version lets you sync directly with

- the contacts on your phone, which in our case was synced with Exchange.
- » Take a picture. Using the app, hit the "+" button which will allow you to take a picture or access existing photos.
- » Save to Address Book. After taking the picture, you should visually see if you have any errors or omissions on the transferred contact data. In our tests, the app could get about 95 percent of the data we needed.
- » Using the "Save to Address Book" button, decide where you want it to go. We selected Contacts (Exchange), but any Exchange would work.
- » Open Outlook and track in Microsoft Dynamics CRM. Since the contact was already added to Exchange, it was in our Outlook contacts almost immediately. Once in Outlook, we can simply track in Microsoft Dynamics CRM. When we had a quantity of contacts, we sorted by the "Modified" date in our Outlook view and did a multiselect "Track in CRM".

Inactive records can be found by viewing the inactive records view or using Advanced Find, but they will not appear in standard active record views.

(Learn more at http://blog.customereffective.com/blog/2014/03/microsoft-dynamics-crm-data-archival-strategies.html)

#### microsoft member showcase



#### HERE'S THE LIST OF RESOURCES SHILPA MENTIONED:

Microsoft Dynamics CRM Customer Center www.microsoft.com/en-us/ dynamics/crm-customercenter

CRM Help Center www.microsoft.com/en-us/ dynamics/crm-help-center

Marketing Help Center www.microsoft.com/en-us/ dynamics/marketing-helpcenter

Social Listening Help Center www.microsoft.com/en-us/ dynamics/social-listeninghelp-center

Microsoft Dynamics CRM on YouTube

www.youtube.com/user/ msdyncomm/DynamicsCRM

Facebook App
https://apps.facebook.com/
microsoftdynamics

Forum

https://community.dynamics. com/crm/f/default.aspx

Microsoft Dynamics CRM Team Blog http://blogs.msdn.com/b/crm

#### SHILPA SINHA

#### SENIOR PROGRAM MANAGER

hilpa Sinha serves as a senior program manager for the Microsoft Dynamics CRM team, focusing on readiness and community activities for Users and Partners. CRMUG° caught up with Shilpa after her fall event run, just before she and her team moved on to the next set of readiness events.

CRMUG: You've been very involved with CRMUG Summit, helping to get R&D and support team members to the event. What's the greatest benefit to Microsoft with this involvement?

**Shilpa Sinha (SS):** We look at CRMUG as a great platform to interact with Microsoft Dynamics CRM Users. We receive direct feedback, and that helps us make the solutions better for our Customers. We also love the interactions and the energy of this ecosystem.

**CRMUG:** What were some of the most common questions the R&D team heard at this year's CRMUG Summit?

**55:** We heard questions and great feedback on topics ranging from enhancements to sales and office productivity to investments on the platform. Overall, the questions were very roadmap-focused, and the feedback was extremely positive.

**CRMUG:** I'm sure the support engineers had a lot of great questions directed at them as well. How closely does your team work with the support team?

**SS:** We work very closely with support and also regularly receive Customer feedback from them. The support team partners with R&D to create very valuable trainings for each release, which are available on the Microsoft Dynamics YouTube channel (see sidebar).

CRMUG: Your main role is focused on readiness and community.. What are some of the key tools that a User should seek out with regard to product readiness for Microsoft Dynamics CRM 2015?

**55:** End Users should bookmark the CRM Customer Center for all the latest information (see sidebar). Through that page, they can also access the Microsoft Dynamics CRM, Marketing, and Social Listening Help Centers.

We also recently launched a Microsoft Dynamics CRM page on the YouTube channel and also created a Facebook app (see sidebar) that is mobile-optimized and contains videos as well as a conversation portal that pulls in conversations that are happening about Microsoft Dynamics CRM on social media sites. All Users have to do is log into Facebook, either directly to the app or on the Microsoft Dynamics Facebook page (www. facebook.com/msftdynamics) under "More".

Also, I highly encourage Users to utilize our forums and blogs; they are great resources (see sidebar).

**CRMUG:** Can you share any examples of when something you pulled together from a readiness standpoint really helped a User?

**SS:** The newly launched page on the YouTube channel has really been well received. I am working with the team to launch early release videos on Microsoft Dynamics CRM, Microsoft Marketing, and Social Listening, and this page allows for easy discoverability and access to the content.

**CRMUG:** What do you like most about your role?

**55:** That is a trick question! I love everything about my role...honestly. I run three programs for R&D: readiness enablement, community enablement, and product suggestions and feedback, and if you ask me to point out one thing, I would say that the Customer and Partner interactions are what I like the most. These interactions enable me to take back great feedback and actionable suggestions to my team, and this in turn helps us serve our Customers and Partners better.

## CONTEST



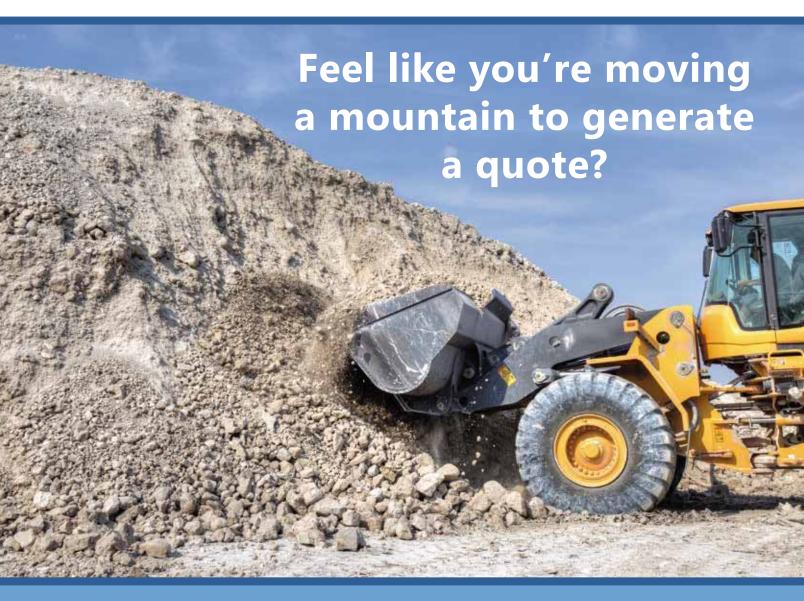


#### Q2/Q3 CONTEST WINNER:

VE Chip Thiel of Ohio Gratings, Inc. "Wastin' away again in User ProblemVille" What do you suppose these CRMUG Summit attendees were discussing in the hall after a session?

Simply email your submission to Captioncontest@crmug.com. The winning submission will be printed in the magazine's next issue.





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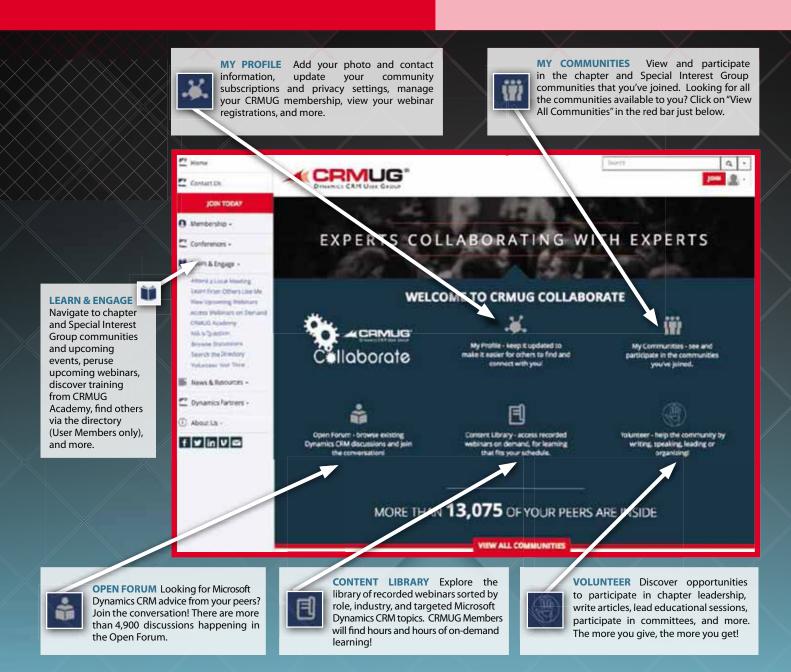




## KEEP CALM AND COLLABORATE

# Where Did My Community Features Go?

The new CRMUG® website has arrived, and Collaborate has a new home... front and center on the home page! Sign in at www.crmug.com to unlock the power of your CRMUG Collaborate community.





# CRMUG . 5 SUMMIT

**RENO•TAHOE 2015** 

October 12-16, 2015

#### What she said...

CRMUG Summit is my time to geek out with like minded people and be supported, challenged and inspired. I can't imagine missing it!

-Britta Scampton, BGM TruNorth Wealth Partners

Learn more today about this must-attend event: crmugsummit.com/reno



#### We look forward to seeing you all in Reno in 2015!

Act-On Software, Inc.

Adxstudio Inc.

**Aspect Software, Inc.** 

**Beringer Associates, Inc.** 

**C5** Insight

Cincom

**ClickDimensions** 

Cobalt

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**Dun & Bradstreet** 

EasyTerritory.com

**Edgewater Fullscope** 

eOne Solutions

**Experlogix** 

**Fastpath** 

**Higher Logic** 

**Hitachi Solutions** 

**InsideView** 

KingswaySoft, Inc.

Microsoft

**Microsoft Retail Store** 

**MTC CRM** 

Myappsanywhere

**Neudesic** 

Parature, from Microsoft

**Perceptive Software** 

**PowerObjects** 

**QGate** 

Resco.net

**Rockton Software** 

Salesfusion

**Scribe** 

not have been the same without YOU!

**Silanis Technologies** 

Silverpop, an IBM

company

Solver, Inc.

Sonoma Partners

**TARGIT** 

The List

**TinderBox** 

**Tribridge** 

**Trillium Software** 

**Xpertdoc. Better** 

documents. Faster.

**ZAP Business** 

Intelligence



tablet and see where the road takes you.



#### Resco Mobile CRM for Microsoft Dynamics CRM

- 750+ corporate customers
- 10,000s of licensed users
- 180,000 app downloads



5.92014

4.9.2014

Store catalogue

# wordfind

Congratulations to Deann Geistler of Principal Global Investors for winning the last issue's Word Find. Your prize is in the mail! Below are 25 words that relate to the topics and theme in this issue of CRMUG® Magazine. These words can be found in the grid horizontally, vertically, diagonally, backwards, and forwards. Submit your completed Word Find for a chance to win a gift certificate; simply scan and email your entry to Wordfind@crmug.com.

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Academy

Brad Koontz

Chapter

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Kylie Kiser

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Shilpa Sinha

Showcase

Social Media

Summit

Tips and Tricks

Users

Waddell and Reed

#### isv partner member showcase



#### NEUDESIC

COMPANY

Neudesid

#### **INTERVIEWEES**

Monika Kwiatek (CRM architect)

Kristin Metcalfe (marketing manager)

Riaan Van Der Merwe (general manager, Microsoft Dynamics)

#### **PHONE**

949-754-5274

#### **EMAIL**

Kristin.metcalfe@neudesic.com

#### **WEBSITE**

www.neudesic.com

#### **HEADQUARTERS**

Irvine California

**CRMUG® MEMBER SINCE** 2009

eudesic is a Microsoft Dynamics CRM Gold Certified service and solution provider, working closely with clients in a wide range of industries including hospitality, healthcare, education, and financial services. Neudesic combines this insight with in-depth knowledge of application and systems integration, enterprise mobility, business intelligence, enterprise collaboration, and cloud computing technologies to deliver unique and flexible solutions that extend the capabilities of Microsoft Dynamics CRM solutions for a number of verticals.

We caught up with the Neudesic team at CRMUG Summit while in St. Louis to learn more about their solutions and hear about their first Summit experience.

#### CRMUG: It's wonderful to meet all of you. How has the conference been going so far?

**Riaan Van Der Merwe (RV):** It's been great! I like the show because it's really all about Customers in the fray, trying to get their solution rolled out. As a Partner, we also get to learn about things that don't get discussed during the sales cycle, such as where Users have issues. This has led to some really interesting discussions.

**Kristin Metcalfe (KM):** From the CRM medics at the Hub to the great conversations in the hallways, everyone is eager to talk and share expertise. It's a brilliant forum for knowledge sharing. We also

had the opportunity to present several sessions including:

- » CRM in the Big Enterprise: Cross-Continental Deployments by Riaan Van Der Merwe
- » What's Brewing: Make the Most of MoCA (CRM for Tablets) and Expresso by Mark Purnell
- » To Cloud or Not to Cloud: Addressing CRM Concerns with Cloud Deployments by Monika Kwiatek

## **CRMUG:** We are so glad to hear that. Tell us a little more about your company and where your expertise lies.

**RV:** We are a full-service Microsoft Dynamics CRM ISV specializing in more than just CRM analysis. We're really business analysts, helping Users with training as well as implementing and extending their solution to meet their specific needs.

That cross-practice expertise is one of our valueadds; it enables us to advise and assist customers in complex integration scenarios.

#### **CRMUG:** What kind of functionality have you made possible for the education industry?

**Monika Kwiatek** (**MK**): We've realized considerable success in many industries that have contributed to and strengthened our capabilities for both K-12 and higher education institutions.

In the K-12 space, we deploy a case management



solution to focus on monitoring students so they don't fall through the cracks of the system. In addition, we help schools stay on top of finances and in tune with staff needs – natural extensions of case management-style solutions.

The business side of student management in higher education has aspects that are similar to K-12. But there are added levels of complexity that demand solutions to monitor financials and define marketing strategies in order to best recruit and engage potential students.

We've tailored Microsoft Dynamics CRM for these needs and more, meeting educational and government requirements along the way. Institutions can see the information they need in order to deliver proactive and relevant communications to prospective, current, and former students.

#### **CRMUG:** What would you say is the #1 way Neudesic can improve the Microsoft Dynamics CRM User experience?

**RV:** Neudesic is very well-versed in change management and improving User adoption for an organization's Microsoft Dynamics CRM system. We have the expertise that allows Customers to focus on their core business instead of getting mired down in the process and technical issues. In our experience, a well-defined change management process helps with User adoption and satisfaction.

**MK:** Yes, we see clients through the IT changes as well as the industry changes. For example, in healthcare, patients, clients, or members

now demand a more personalized communications experience – whether working with insurance companies or healthcare providers.

We've helped healthcare organizations select the right channels for communication based on member preferences. By allowing members to specify their requirements, such as spoken and written language preference, organizations can ensure member details are up-to-date no matter who they talk to at the provider, and that the provider honors preferences like text or email reminders, and any other criteria deemed relevant.

## CRMUG: We are delighted you could join us for CRMUG Summit 2014. What have been the top two highlights of your experience here?

**KM:** We've been impressed with the questions our team members received during their presentations. We've also appreciated the quality social time spent with clients and Partners to celebrate successful projects and partnerships.

#### CRMUG: Do you think you'll be back next year?

**RV:** No doubt. We'll be back. The conversations and experience have been phenomenal. We look forward to giving back to the User Group community by getting more involved on the forums and presenting additional webcasts for various SIGs. You'll be seeing us around for sure!

"Neudesic came in and looked at our processes, how we did things, and what our business goals were, and then they created a new Microsoft Dynamics CRM system that just seamlessly fit into what we were doing. Now I can't imagine what we would do without it."

- Rona Young, marketing manager, Prince Resorts Hawaii

#### user member showcase



COMPANY Waddell & Reed, Inc.

#### INTERVIEWEE

Laura Mortick. senior applications specialist

#### **HEADQUARTERS**

Overland Park, Kansas

#### **PHONE**

913-236-3856

#### **EMAIL**

Lmortick@waddell.com

#### WEBSITE

www.waddell.com

#### **ESTABLISHED**

1937

MICROSOFT DYNAMICS CRM **USER SINCE** 2010

**CRMUG MEMBER SINCE** 2012

**NUMBER OF USERS** Approx. 350

#### WADDELL & REED, INC.

addell & Reed, Inc. is national financial planning and investment management firm with more than 160 registered financial advisor offices across the country. The firm's nearly 1,800 financial advisors work with individuals, families, and small businesses to create customized plans designed to identify financial goals and steps toward achieving them. Founded in 1937, Waddell & Reed is one of the oldest financial planning firms in the country.

#### RECRUITING WITH EASE

Waddell & Reed leverages Microsoft Dynamics CRM differently than most; instead of a sales or marketing tool, they use it to manage the process of recruiting new financial advisors to the firm. Waddell & Reed's field leaders use Microsoft Dynamics CRM to progress candidates through the hiring process, whether the recruits have a financial background or come from other industries.

Laura Mortick is the resident Microsoft Dynamics CRM expert at Waddell & Reed, managing all things CRM, such as training in new Users, implementing system changes and customizations, troubleshooting issues, and creating basic documentation for the company's 350 Users. "Microsoft Dynamics CRM helps our field leaders manage the hiring funnel from start to finish," Laura says. "In Microsoft Dynamics CRM, they can see how many times they need to follow up with each recruit, along with the exact information they need to know about that person to keep that relationship engaged."

Waddell & Reed is getting ready to upgrade from Microsoft Dynamics CRM 2011 to 2013, and Laura is excited for the cleaner design that comes along with it. During the upgrade process with their hosting Partner, Tribridge, Laura is also going to make a few user interface (UI) adjustments that her Users have requested, adding custom fields and new dashboards that simplify their daily tasks and improve usability.

With just a handful of Users in her office and the remaining 340+ scattered across the country, Laura plans to break the upgrade training process into two webinars: One that introduces the navigational changes and another that reviews the basic enhancements. Laura is also going to create



Waddell & Reed is one of the first mutual fund and financial planning complexes in the country, providing proven, professional investment management and customized financial planning services.

two-minute videos as job aids to help Users navigate through Microsoft Dynamics CRM on their own.

#### EMBRACING THE

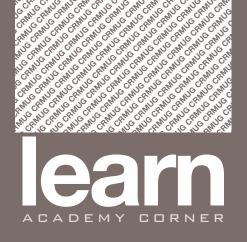
Laura is discovering a number of other benefits in the community. "It's awesome to call on other Users and ask questions or run specific examples by them. It just makes you feel like you're not in it alone," she says.

As part of the Kansas City Chapter leadership team, building relationships is Laura's favorite part of getting involved. "When I see a new User attend our meetings, I make sure to reach out and introduce myself. I remember what it was once like being new to the group, but it's when Users feel comfortable that they open up and share, making our entire chapter stronger."

Strong indeed: Kansas City was named CRMUG Chapter of the Year at Summit. Portraying strong organizational and coordination skills, Laura is putting those to good use by sending reminders for meetings, pitching in when other leaders are busy, and hosting. Laura says, "We don't have actual roles assigned within the leadership team, but we all know when to pitch in and help when and if needed."

The Kansas City Chapter partners up with the Ozarks Regional Chapter of Joplin, Missouri, whose Members typically call in for the meetings. At Summit, Laura was able to meet Ozarks Members in person, and they plan to make the trek to Kansas City for the next meeting rather than dialing in. "Summit was a great place for us to build our relationships even more and meet people face to face," Laura concludes. "Sometimes that can make all the difference."





## Dynamics CRM User Group

#### CRMUG ACADEMY AWARDS BLACK BELTS AT CRMUG SUMMIT 2014

RMUG® Academy Black Belt graduates that attended Summit 2014 in St. Louis were treated to an extra surprise: They were awarded their belts and certificates alongside Gus Gonzales, Black Belt instructor and CRMUG All Star (second from right).

Congratulations to Michael, Jay, and Nick, pictured at right, and to all our Black Belt recipients!

- » Jay L. Murphy Red Lion Controls
- » Deb Singletary Wells Fargo Services Group
- » Curtis Ward Lend Lease
- » Nirav (Nick) Patel Spraying Systems Co.
- » Joanna Ward Camfil
- » Michael Reeves State Volunteer Mutual Insurance Co.
- » Christina Letto Briggs & Stratton
- » Kristin Walther Briggs & Stratton



#### ABOUT THE PROGRAM

The CRMUG Administrator Black Belt Training Series is a structured, four-course series for Microsoft Dynamics CRM administrators and super Users. The series is designed to help Users master the art of administrating, configuring, and adapting Microsoft Dynamics CRM. CRMUG partners with expert consultants and dedicated trainers to deliver this outstanding online training to Members from all types of organizations, from small businesses to large enterprises.

#### AT A GLANCE, HERE'S HOW IT WORKS

» It's a series of four three-hour training courses that mix theory and real-world, hands-on practice.

- » Courses start with the Blue Belt course and build skills as Users work their way through the Purple Belt, Brown Belt, and finally the Black Belt course.
- » Each course ends with an online lab and test for students.
- » Each student must successfully complete and pass labs and tests to proceed to the next belt.

Visit www.crmug.com/academy to see the complete schedule of CRMUG Administrator Black Belt Training Series courses, along with pricing and registration information. Mastering Microsoft Dynamics CRM is easier than you think with Administrator Black Training from CRMUG Academy. Enroll **CRMUG** today!



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## industry showcase

## FINANCIAL SERVICES:

#### SAVING PENNIES AND MAKING CHANGE

roviding unparalleled service with clients at the center of all they do, these financial firms offer up educational programs, financial tools, expert advice, tax planning services, and more. Saving pennies and making investments that improve bottom lines, these CRMUG® Members are on the right track to making change that matters in the financial services industry.

#### **BGM TRUNORTH WEALTH PARTNERS** Oakdale, Minnesota

**BGM TruNorth Wealth** Partners is a registered investment advisor, constructing financial plans that advance clients' life goals. At the same time, the company fosters a long-term financial advisory relationship to stay attuned to clients' changing goals, such as acting as a client's CFO and offering investment management and tax planning expertise.

#### CARROLL **ENTERPRISES (SBIA,** SBSB)

#### Worcester, Massachusetts

With a nationwide life insurance marketplace, learning center, and DIY tools, PivotCare, a Carroll Enterprises company, provides a number of resources to help with life's pivotal moments.

#### COMMERCE BANK Kansas City, Missouri

Commerce Bank provides a full range of financial products to consumer and commercial customers, including: banking, lending, payment processing, trust, brokerage, and capital markets services. Serving its customers from 196 branches across the U.S., Commerce Bank uses a variety of platforms, including an expansive ATM network, full-featured online and mobile banking, a central contact center, and a nationwide presence in the commercial payments industry.

#### **EDELMAN FINANCIAL SERVICES** Fairfax, Virginia

**Edelman Financial Services** is one of the leading independent financial planning firms in the nation, managing \$13.7 billion for more than 26,000 clients both online and via 38 offices across the country. (Data as of September 30,

2014.)





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Developing a Successful
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with Microsoft Dynamics CRM



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Marketing with Microsoft CRM Idea eBook



Microsoft CRM Implementation Blueprint



Quick Guide: Marketing ROI for Dynamics CRM

These resources and more are available to download for FREE at www.clickdimensions.com/content. And if you would like to see how our email marketing and marketing automation tools can help your organization, give us a call at 888.214.4228 or visit clickdimensions.com today.

download at clickdimensions.com/content

# NINUTES WITH CRINUG'S VOLUNTEER OF THE QUARTER



Kylie Kiser, CRM specialist for Edelman Financial Services

Kylie Kiser was a natural choice for this quarter's Volunteer of the Quarter selection, based on the great content she's putting out on her blog (http://crmkrm. blogspot.com) and the work she's done with the D.C. Chapter. Thank you, Kylie, for your contributions to the Microsoft Dynamics CRM community!

#### Who interests you on social media right now?

My favorite blogs are PowerObjects and CRM Tip of the Day. I also love to hear from Adam Vero because his CRMUG® Chapter meetings always involve a pub night, and he takes the time to fully explain features that Microsoft Dynamics CRM documentation glosses over.

#### On my desk right now are...

A Thor Mr. Potato Head, lots of CRMUG Summit swag, and project notes covered with to-do check boxes.

#### My three goals for 2015...

- 1. Upgrade to Microsoft Dynamics CRM 2013/Microsoft Dynamics CRM 2015.
- 2. Take some Microsoft Dynamics CRM 2015 certification tests.
- 3. Go to Surf Camp in Costa Rica (but that has been my goal for about 10 years).

#### What I do when I'm not at work...

Sew, knit, and box in my pink gloves.

#### The best advice I ever received...

My parents always told me I could accomplish anything and be whatever I wanted to be. If I said I could not do something, they would say, "Why not?" This is great encouragement and advice in a world that so often tells us what to do and who to be.

# 000

Congratulations to our Q2/Q3 2014 contest winner, Michael Edwards from **American Health Care Association!** Michael found the logo on page 22 of the Q2/Q3 2014 issue of CRMUG® Magazine. Let's play again. Hidden somewhere between the covers of this magazine is our CRMUG logo. **Can you** find it?

While our logo shows up throughout the magazine in conventional spots, it's hidden in only one place.

When you've found it, send an email to **Logocontest@crmug.com** with an explanation of where and on what page it's at. We'll choose a winner at random and will highlight him/her in the next **issue** of the magazine.



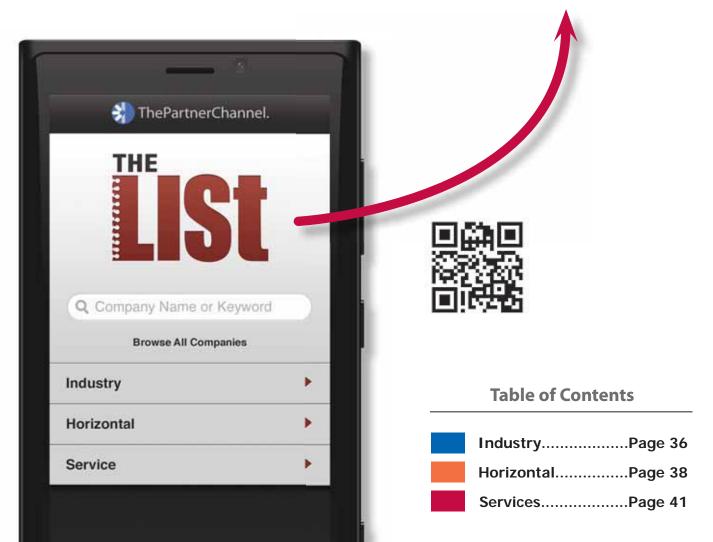


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NOTE: The Partner Channel and Dynamic Communities offers no expressed or implied warranty or guarantee for any of the products included in this directory. Support and quality assurance of these software products and services are solely the responsibility of each Microsoft Dynamics Partner.

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#### **→** Construction

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**Karen Tran** ChargeLogic

#### → Accounting

#### cunnect rockton software

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#### → Application Lifecycle Management



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#### **»**Automation

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Synchronize and automate CRM lists and contacts with Microsoft Exchange.

#### → Backup & Recovery

Isis, Inc. AX CRM GP NAV POS RM SL

http://www.getpg.net • 804-762-4200

**Praetorian Guard** PG will backup your PCs and Servers across your entire organization.

#### **»**Budgeting



#### **Total Dynamics Solutions, LLC**

CRM GP NAV POS RM SL http://www.totaldynamicssolutions.com

877-855-8860

**Budgeting & Planning ToolKit** for Your Entire Organization

- NO User/Seat Licensing Costs
- Financial & Sales Planning
- Procurement Planning
- Trade Management
- · Secure input, consolidation, and Versioning; top-down/bottom-up

#### → Business Intelligence

#### Corporate Renaissance Group CRM

http://www.trendminer-xrm.com 613-232-4295

**Trend Miner** 

Ground-breaking historical trend analysis & B.I. visualization for Microsoft Dynamics CRM. Go beyond a snapshot of data to reveal eye-opening trends for better planning & decision making.

#### D&B (Dun & Bradstreet) GRM

http://www.dnb.com/msdcrm • 952-393-3773 **D&B360 for Microsoft Dynamics** 

D&B360 integrates with Dynamics CRM, giving users access to continually updated business data on 240M+ companies and 110M+ professional contacts, and includes real-time feeds social media, news and more.



#### **Business Intelligence**

#### Halo Business Intelligence AX CRM GP NAV SI

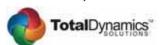
http://www.halobi.com • 888-300-0219 **Halo Business Intelligence** Any source, data quality, rapidly deploy, predict, collaborate & mobile.

#### Sunrise Technologies AX

CRM GP NAV SL

http://www.sunriseconsult.com • 336-722-6741 Sunrise BI CfMD

Put data to work anytime, on any device, anywhere; enabling companies to make decisions and take action, empowering users beyond BI. Provides mobile, analytics, and extension/completion of transactional systems.



#### Total Dynamics Solutions, LLC AX CRM GP (NAV POS RM SL

http://www.totaldynamicssolutions.com

877-855-8860 **Business Intelligence Plus Toolkit** 

- for Your Entire Organization
- NO User/Seat Licensing Costs
- Dynamic Cubes (GL/Profit/&More) · Web-based Reporting
- Dashboards
- Admin Tools: Security/Scenarios/ Hierarchy/ & More



#### ZAP AX CRM NAV

http://www.zapbi.com • 415-889-5740 ZAP Business Intelligence CFMD

ZAP provides 'Buy, Not Build' business intelligence for companies using Microsoft Dynamics AX, CRM and NAV. With 1000+ pre-packaged analytics, our BI deployments are rapid and deliver immediate business outcomes.

#### ⇒Collaboration Platform



Higher Logic AX CRM GP NAV http://www.higherlogic.com • 202-360-4402

**NEW:** Connected Community

The leading cloud-based community platform used by organizations worldwide to bring people together in secure communities designed to ignite knowledge sharing, drive content creation and solve problems.

#### **→ Compliance**

#### Isis, Inc. AX CRM GP NAV POS RM SL

http://www.getpg.net • 804-762-4200 **Praetorian Guard** 

PG will allow your institution to meet the stringent regulations and auditing guidelines including Sarbanes Oxley, FINRA and more.

#### Credit Card/Check Processing



#### Gorilla Expense AX

CRM GP NAV SL

http://www.gorillaexpense.com • 877-973-6737 **Gorilla Expense** 

The Gorilla Expense T&E solution includes mobile apps, corporate & personal credit card import, project accounting expenses, multi-currency, VAT/ GST features, policy setup & '1-click' integration to GP, NAV, SL & AX

#### Nodus Technologies, Inc. CRM

http://www.nodus.com • 909-482-4701 **CRM Charge** 

Our secure ePayment solution will simplify credit card and eCheck processing, reduce credit card fees & help fulfill PCI requirements for CRM online and on premise.

#### **→ Customer Relationship** Management

#### Armanino AX CRM GP

http://www.amllp.com/microsoft-dynamics 925-790-2600

Armanino CfMD

A Gold Certified ERP/CRM Partner, we provide award-winning implementation and support for Dynamics to meet your industry-specific needs.

#### eBridge Connections AX CRM GP

http://www.ebridgeconnections.com 800-755-6921

eBridge for CRM

Cloud solution for seamless integration of customer & opportunity data.

#### Experiogix, Inc. AX CRM GP NAV http://www.experlogix.com

805-504-9729 ext. 712

**Experlogix CPQ (Configure Price Quote) for Microsoft Dynamics CRM & ERP** 

Experlogix CPQ solutions meet the demands of today's competitive marketplace by simplifying the process of selling customized products, accelerating proposal development times and increasing quote-to-order ratios.

#### mcaConnect AX CRM

http://mcaconnect.net • 866-622-0669

We are a global leader in delivering Dynamics CRM/XRM solutions. Our success is exemplified by multiple Microsoft Partner of the Year awards and numerous customer success stories.

#### Perceptive Software GRM

https://www.perceptivesoftware.com/ products/perceptive-interact/ application-integration/microsoftdynamics-crm.html • 800-941-7460

**NEW:** Perceptive Software Interact for Microsoft Dynamics CRM

Perceptive's fully integrated Interact for Microsoft Dynamics CRM provides better access to information and documentation within CRM. Your staff has visibility into all documents and data associated with accounts.



#### **Visionary Software** Consulting, Inc. CRM

http://crm-rules.com • 877-276-1942 **CRM Rules for Microsoft Dynamics CRM 2011 & 2013** Easily configure dynamic CRM forms. More powerful than Business Rules.

#### **→Data Integration**

#### MCRM Exchange Sync図目

Brite Global, Inc. CRM

http://www.briteglobal.com/ exchangesync • 310-494-9699 ext. 4 **Microsoft Dynamics CRM** 

to Exchange Sync Synchronize and automate CRM lists and contacts with Microsoft Exchange.



#### D&B (Dun & Bradstreet) GRM

http://www.dnb.com/msdcrm • 952-393-3773 **D&B360 for Microsoft Dynamics** D&B360 integrates with Dynamics CRM, giving users access to continually updated business data on 240M+ companies and 110M+ professional contacts, and includes real-time feeds social media, news and more.

#### eBridge Connections AX

CRM GP NAV SL

http://www.ebridgeconnections.com 800-755-6921

**eBridge Integration Solution** The leading cloud integration platform for EDI, eCommerce & CRM systems.

#### ⇒Data Management

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CRM, giving users access to continually updated business data on 240M+ companies and 110M+ professional contacts, and includes real-time feeds social media, news and more.

#### »Document Management

#### **Liaison Software Corp**

AX CRM GP NAV SL

http://www.liaisonsc.com 800-811-4618 ext. 201

Liaison Messenger EDD

Batch email, fax, print, archive Invoices, Statements, Sales Orders, Purchase Orders to customers, vendors, sales. Attach supporting documentation. Use existing reports (GP report writer, SSRS, Crystal).



#### PaperSave AX CRM GP SL

http://www.PaperSave.com • 877-727-3799 PaperSave CFMD

PaperSave is a complete document management, electronic workflow and invoice automation solution. Certified for Microsoft Dynamics GP, SL, AX, & CRM.

#### Perceptive Software GRM

https://www.perceptivesoftware.com/ products/perceptive-interact/ application-integration/microsoftdynamics-crm.html • 800-941-7460

**NEW:** Perceptive Software Interact for Microsoft Dynamics CRM

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#### **→E-commerce**

Avalara, Inc. AX CRM GP NAV POS RM SL

http://www.info.avalara.com/TheList 877-780-4848

Avalara for Sales Tax Automation CFMD

Automate and eliminate the complexity of sales tax management with Avalara. A cloud-based sales and use tax calculation, exemption certificate management, filing and remittance solution for Microsoft Dynamics.

#### eCommerce21™

#### **Computer Pundits Corporation** AX CRM GP

http://www.eCommerce21.com • 888-786-3487 eCommerce21

Patented B2B and B2C database driven eCommerce, fully integrated with Dynamics, for automated production of Web Storefront with intuitive navigation, SEO and full Shopping Cart for easier sales from your website.

#### eBridge Connections AX

CRM GP NAV SL

http://www.ebridgeconnections.com 800-755-6921

eBridge for eCommerce

Cloud integration with 20+ eCommerce platforms eg. Magento, Amazon, eBay

#### eCommerce

#### k-eCommerce AX CRM GP NAV

http://www.k-eCommerce.com 855-k-eCommerce

k-eCommerce

Integrated B2B, B2C & Sales Portal websites deployed on premise or in a PCI Certified cloud. Built-in CMS, SEO, multilingual / multicurrency capabilities & responsive web design to support mobile & tablet devices.

#### ₩EDI

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Cloud EDI solution, no transaction fees, 1000+ trading partners.

#### >> Electronic Document Delivery (Email)/Faxing

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http://www.liaisonsc.com

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Batch email, fax, print, archive Invoices, Statements, Sales Orders, Purchase Orders to customers, vendors, sales. Attach supporting documentation. Use existing reports (GP report writer, SSRS, Crystal).

#### >> Electronic Signatures

#### AssureSign LLC AX

CRM GP NAV SL

http://www.assuresign.com • 407-670-0400 AssureSign Electronic

**Signature Software** Integrated cloud or on-premise enterprise class Electronic Signatures.

#### **→Expense Solutions**



#### Gorilla Expense AX

http://www.gorillaexpense.com 877-973-6737

**Gorilla Expense** 

The Gorilla Expense T&E solution includes mobile apps, corporate & personal credit card import, project accounting expenses, multi-currency, VAT/ GST features, policy setup & '1-click' integration to GP, NAV, SL & AX.

#### >> Field Service Management



#### FieldOne Systems AX CRM

GP NAV RM SL

http://www.fieldone.com • 201-252-8900 FieldOne Sky

An end-to-end platform supporting all phases of field service management including routing and scheduling, work process automation, communications, and business intelligence with support for any mobile device.

#### Vertical Solutions, Inc. AX

CRM GP NAV SL

http://www.vertsol.com • 513-891-7997 VServiceManagement CFMD

Enterprise field service CfMD: Asset Mgmt., Contracts/Warranty, Dispatch & Mobility.

#### Inventory Management

#### Armanino AX CRM GP

http://www.amllp.com/microsoft-dynamics 925-790-2600

Armanino GMD

A Gold Certified ERP/CRM Partner, we provide award-winning implementation and support for Dynamics to meet your industry-specific needs.

#### **→**Job Costing

#### JOVACO Solutions Inc. CRM GP

http://www.jovaco.com • 888-988-3535 ext. 122 **JOVACO Project Suite** 

Project accounting for professional service firms to manage projects through web-based time & expense and resource mgmt modules. Top features: extensive reporting, multi-company & interdepartmental capabilities.

#### → Marketing Automation



#### CoreMotives, a Silverpop company

http://www.coremotives.com • 770-916-6485 **CoreMotives Marketing Suite** Marketing power for 1,600+ companies using Microsoft Dynamics CRM: Email marketing, Lead scoring, Web tracking, Event management, Web forms, Surveys, and Nurture marketing - all native within your CRM.

#### → Occupational Health & Safety

Joesoftware Inc. GRM

http://www.joesoftware.com • 780-990-0220 Marshal

Keep Operational Health and Safety records up-to-date and audit ready from the field or the office using Marshal.

#### **→**Portals



#### Adxstudio Inc. CRM

http://www.adxstudio.com • 800-508-7811 Adxstudio Portals Web portal application platform for

Dynamics CRM Online, 2013 & 2011.

#### DynamicPoint CRM GP NAV

http://www.dynamicpoint.com • 562-726-4396 **Employee, Vendor & Customer Portals Integrated with Microsoft Dynamics** 

Extend crucial Microsoft Dynamics data with custom SharePoint Portals.

#### Experlogix, Inc. AX CRM GP NAV

http://www.experlogix.com 805-504-9729 ext. 712

**Experlogix CPQ (Configure Price Quote) for Microsoft Dynamics CRM & ERP** 

Experlogix CPQ solutions meet the demands of today's competitive marketplace by simplifying the process of selling customized products, accelerating proposal development times and increasing quote-to-order ratios.

#### ⇒Pricing

#### **Flintfox International Limited** AX CRM NAV

http://www.flintfox.com • 844-876-4276 TPM for Dynamics Suite 🀠

Flintfox solutions provide a single, integrated platform to manage all trade promotion activity, from client relationships to the financial execution; streamlining information and managing complex pricing with ease.

#### ⇒Productivity

Isis, Inc. AX CRM GP NAV POS RM SL

http://www.getpg.net • 804-762-4200

**Praetorian Guard** 

Audit your users and ensure they are productive in their work. Locate inefficiencies and take proactive steps to increase productivity.

#### **→**Project Accounting

JOVACO Solutions Inc. CRM GP

http://www.jovaco.com • 888-988-3535 ext. 122 **JOVACO Project Suite** 

Project accounting for professional service firms to manage projects through web-based time & expense and resource mgmt modules. Top features: extensive reporting, multi-company & interdepartmental capabilities.

#### >> Sales Order Processing **Enhancement**

Experlogix, Inc. AX CRM GP NAV

http://www.experlogix.com 805-504-9729 ext. 712

**Experiogix CPQ (Configure Price Quote) for Microsoft Dynamics CRM & ERP** 

Experlogix CPQ solutions meet the demands of today's competitive marketplace by simplifying the process of selling customized products, accelerating proposal development times and increasing quote-to-order ratios.

Liaison Software Corp AX

CRM GP NAV SL

http://www.liaisonsc.com

800-811-4618 ext. 201

**Liaison Messenger EDD** 

Batch email, fax, print, archive Invoices, Statements, Sales Orders, Purchase Orders to customers, vendors, sales. Attach supporting documentation. Use existing reports (GP report writer, SSRS, Crystal).

#### ⇒Security

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http://www.getpg.net • 804-762-4200

**Praetorian Guard** 

PG will allow your business to better secure your users & network.

#### >> Supply Chain Management

Armanino AX CRM GP

http://www.amllp.com/microsoft-dynamics 925-790-2600

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A Gold Certified ERP/CRM Partner, we provide award-winning implementation and support for Dynamics to meet your industry-specific needs.

#### **≫**System Enhancement



#### **DynamicsDownloads**

CRM GP NAV S

http://www.DynamicsDownloads.com 419-581-2300

**DynamicsDownloads** Looking for a Dynamics Add-On Solution? Search, Buy and Sell here!

Isis, Inc. AX CRM GP NAV POS RM SL

http://www.getpg.net • 804-762-4200 **Praetorian Guard** 

User Auditing, Network Monitoring & Network Admin for ALL businesses.

#### ⇒System and Network Management

Isis, Inc. AX CRM GP NAV POS RM SL

http://www.getpg.net • 804-762-4200 **Praetorian Guard** 

User Auditing, Network Monitoring & Network Admin for ALL businesses.

Avalara, Inc. AX CRM GP NAV POS RM SL

http://www.info.avalara.com/TheList 877-780-4848

Avalara for Sales Tax Automation

Automate and eliminate the complexity of sales tax management with Avalara. A cloud-based sales and use tax calculation, exemption certificate management, filing and remittance solution for Microsoft Dynamics.

Vertex SMB AX CRM GP

http://www.VertexSMB.com/TheList 855-221-5885

Vertex SMB

Cloud-based, fully automated sales & use tax calculation and returns solution for Microsoft Dynamics with pay-asyou-go pricing.

#### >> Time and Attendance

JOVACO Solutions Inc. CRM GP

http://www.jovaco.com • 888-988-3535 ext. 122 **JOVACO Project Suite** 

Project accounting for professional service firms to manage projects through web-based time & expense and resource mgmt modules. Top features: extensive reporting, multi-company & interdepartmental capabilities.

#### → Trade Promotion Management

#### **Flintfox International Limited** AX CRM NAV

http://www.flintfox.com • 844-876-4276 TPM for Dynamics Suite GMD

Flintfox solutions provide a single, integrated platform to manage all trade promotion activity, from client relationships to the financial execution; streamlining information and managing complex pricing with ease.

#### >> Travel Expense Management



#### **Gorilla Expense**

AX CRM GP NAV SL

http://www.gorillaexpense.com • 877-973-6737 **Gorilla Expense** 

The Gorilla Expense T&E solution includes mobile apps, corporate & personal credit card import, project accounting expenses, multi-currency, VAT/ GST features, policy setup & '1-click' integration to GP, NAV, SL & AX

#### → Warranty and Claims Management

#### Vertical Solutions, Inc. AX

CRM GP NAV SL

http://www.vertsol.com • 513-891-7997 VServiceManagement CfMD

Enterprise field service CfMD: Asset Mgmt., Contracts/Warranty, Dispatch & Mobility.

#### ⇒Workflow / Notifications

DynamicPoint CRM GP NAV

http://www.dynamicpoint.com • 562-726-4396 **SharePoint Workflow** 

**Solutions that Integrate** with Microsoft Dynamics

Custom SharePoint workflows integrated with Dynamics GP, NAV and CRM.

#### Integrity Data AX CRM

GP NAV SL

http://www.u-linc.com 217-732-3737 ext. 0203

**U-LINC®**, Powered By Integrity Data Workflow and notifications anytime, anywhere in Microsoft Dynamics. Works seamlessly within and across your existing system, is flexible and easy to use, improving organizational performance.



PaperSave AX CRM GP SL

http://www.PaperSave.com • 877-727-3799 PaperSave CfMD

PaperSave is a complete document management, electronic workflow and invoice automation solution, Certified for Microsoft Dynamics GP, SL, AX, & CRM.

#### Perceptive Software CRM

https://www.perceptivesoftware. com/products/perceptive-interact/ application-integration/microsoftdynamics-crm.html • 800-941-7460

**NEW:** Perceptive Software Interact for Microsoft Dynamics CRM

Perceptive's fully integrated Interact for Microsoft Dynamics CRM provides better access to information and documentation within CRM. Your staff has visibility into all documents and data associated with accounts.

#### **Services**

#### → .NET Development

Isis, Inc. CRM GP POS RM SL

http://www.isisinc.com • 804-762-4200

**Isis .NET Development** 

Isis provides cost effective outsourced .NET development (C#, VB.NET, ASP.NET, C++) to our partners and customers worldwide at reduced rates as low as \$20 per hour depending on project size and skill set required!

#### KTL Solutions, Inc. CRM GP

http://www.ktlsolutions.com • 866-960-0001 **Development - Microsoft Dynamics GP/CRM/xRM** 

15 yrs developing GP customizations (Dexterity, .Net), Source Code Developers, Experts with CRM/xRM as a platform creating customized experiences. Sub-contractor rates to other resellers.

#### → Application Service Provider/Hosting



#### MG Technology Group AX

CRM GP NAV

http://www.mgtechgroup.com/about-us/ partner-program/ • 866-350-9310

**Dedicated Dynamics ERP Hosting** Services - 99.999% SLA, SSAE16

11+ years experience, you own the customer relationship, 100% US support.



#### Myappsanywhere AX CRM GP NAV SL

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**Premier Cloud Computing Provider** Myappsanywhere provides a complete go-to-market integrated cloud solution delivering 99.999% uptime, customizations, no minimums and secure storage in its privately-owned SSAE 16 Type 2 data center facilities.



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NjevityToGo White Label "Dynamics Cloud Business in a **Box™" Cloud & Hosting Services** for Dynamics Partners

Don't sell THEIR ERP Cloud, sell YOUR ERP Cloud, YOUR Brand. With our Cloud Services Program—YOU own the customer, YOU handle the billing, YOU make BIG \$ for the entire contract. WE make YOU look like a Cloud Expert!

#### ROSEASP

RoseASP AX CRM GP NAV SL

http://www.roseasp.com • 858-794-9403 RoseASP

Hosted Microsoft Dynamics on Azure/ Private/Hybrid Cloud Solutions. Comprehensive pricing model for SPLA or Subscription Licensing with financially backed uptime guarantee. SSAE-16 audited data centers/SOX compliance.

#### **ERP Cloud** atserv Computing

WatServ AX CRM GP NAV SL

http://www.watserv.com

866-531-2598 ext. 2311

**Hosting and Cloud Computing for Microsoft Dynamics ERP and CRM** WatServ is one of North America's largest. most experienced providers of Cloud Computing services for Dynamics AX, NAV, GP, SL & CRM.

#### → Closing Sales



Work, informed.

InsideView CRM

http://www.insideview.com/microsoft 415-728-9363

InsideView CRM Intelligence CFMD Real-time company and contact information inside CRM that helps you engage more effectively with customers and prospects.

#### **→**Cloud Computing



#### Data Resolution, LLC AX

CRM GP NAV SL

http://www.dataresolution.net • 877-878-9108 **ERP Clouds** 

Data Resolution is dedicated to delivering private ERP cloud services branded as the partners brand. We keep all of our cloud customers optimized & working 24 hours a day, worldwide for the last 11 years.



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720-870-9700 NjevityToGo White Label "Dynamics Cloud Business in a Box™" Cloud & Hosting Services

for Dynamics Partners Don't sell THEIR ERP Cloud, sell YOUR ERP Cloud, YOUR Brand. With our Cloud Services Program—YOU own the customer, YOU handle the billing, YOU make BIG \$ for the entire contract.

WE make YOU look like a Cloud Expert!

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http://www.reviora.com • 813-344-1600 **Cloud ERP hosting** 

Cloud hosting for Dynamics ERP/CRM. Enterprise-class delivery.

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#### >> Custom Development

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Isis provides cost effective outsourced custom development (C#, VB.NET, ASP. NET, C++) to our partners and customers worldwide at reduced rates as low as \$20 per hour depending on project size and skill set required!

#### KTL Solutions, Inc. GRM GP

http://www.ktlsolutions.com • 866-960-0001 **Custom Development** 

We are a certified .Net and Dexterity development group with over 15 years experience. Provide us with your requirements for a free estimate.

#### **→** Data Services

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#### >> Demand Generation



#### D&B (Dun & Bradstreet) GRM

http://www.dnb.com/msdcrm • 952-393-3773 **D&B360 for Microsoft Dynamics** D&B360 integrates with Dynamics CRM, giving users access to continually updated business data on 240M+ companies and 110M+ professional contacts, and includes real-time feeds social media, news and more.

#### **→**Dexterity Development

#### KTL Solutions, Inc. CRM GP

http://www.ktlsolutions.com • 866-960-0001 **Development - Microsoft** Dynamics GP/CRM/xRM

15 yrs developing GP customizations (Dexterity, .Net), Source Code Developers, Experts with CRM/xRM as a platform creating customized experiences. Sub-contractor rates to other resellers.

#### **→Implementation Services**

#### Armanino AX CRM GP

http://www.amllp.com/microsoft-dynamics 925-790-2600

Armanino CfMD

A Gold Certified ERP/CRM Partner, we provide award-winning implementation and support for Dynamics to meet your industry-specific needs.

#### briteglobal

Brite Global, Inc. CRM http://www.briteglobal.com 310-494-9699 ext. 4

**Dynamics xRM Implementation** Specializing in the implementation of comprehensive Microsoft Dynamics CRM solutions and services to meet your specific business needs.

Isis, Inc. CRM GP POS RM SL http://www.isisinc.com • 804-762-4200 Isis Consultina

15+ years of experience in implementing Dynamics Solutions.

#### → Market Research

#### D&B (Dun & Bradstreet) GRM

http://www.dnb.com/msdcrm • 952-393-3773 **D&B360 for Microsoft Dynamics** D&B360 integrates with Dynamics CRM, giving users access to continually updated business data on 240M+ companies and 110M+ professional contacts, and includes real-time feeds social media, news and more.

#### → Marketing Planning & Services

#### Looking Glass Marketing AX

CRM GP NAV RM SL

http://www.lookingglassmarketing.com 614-453-5927

**Cost-effective Marketing Solutions** for Microsoft Dynamics Partners Award-winning outsourced marketing services including lead generation, nurture marketing, email marketing, web design/SEO, content development.



#### The Partner Marketing Group AX CRM GP NAV RM SL

http://www.thepartnermarketinggroup.com 605-574-9432

**Microsoft Approved Vendor for Dynamics Marketing Consulting** From strategic marketing plan development to the critical daily execution, this Microsoft experienced team can help fill your sales pipeline.

#### Tornado Marketing, Inc.

AX CRM GP

http://www.tornado-marketing.com 608-213-0377

**Marketing Consulting** 

Tornado Marketing offers high-impact, highly effective marketing consulting. 10+ years in the channel. Websites. SEO. Copywriting.

#### → Member Organizations

#### **Dynamic Communities**

AX CRM GP NAV

http://www.dynamiccommunities.com 877-324-8880

**Microsoft Dynamics User Groups** - AXUG, CRMUG, GPUG, NAVUG

The User Groups are independent communities that empower Microsoft Dynamics users to connect, learn and share experiences to improve their use of and ROI on their solution. User & Partner memberships are available.

#### **ERP Software Blog AX CRM**

GP NAV POS RM SL

http://www.groupbloggers.com • 888-800-0999

**NEW:** ERP Software Blog/ **CRM Software Blog** 

Group blog sites for VAR/ISV partners to increase SEO, web traffic, leads.

#### → OnDemand Trials



#### RoseASP AX CRM GP NAV

http://www.goERPcloud.com • 855-ERP-CLOUD **ERP Cloud Trials** 

Test drive preconfigured Microsoft Dynamics industry specific demo environments with integrated ISV solutions built for the web. goERPcloud trials help users understand the power of Dynamics and the cloud.

#### **→**Partner Support Service

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Get expert WennSoft support for your customers from an Executive Partner.

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#### Plumbline Consulting, LLC.

AX CRM GP SL

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**Partner Support Services** 

Leverage our Partner Support Services, including Support, Custom Development & Implementation Assistance to expand your offerings. 25+ yrs.

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Avalara for Sales Tax Automation CFMD

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#### **VERTEX** SMB

#### Vertex SMB AX CRM GP

http://www.VertexSMB.com/TheList 855-221-5885

**Vertex SMB** 

Cloud-based, fully automated sales & use tax calculation and returns solution for Microsoft Dynamics with pay-asyou-go pricing.

#### **→**SharePoint Development

#### Armanino AX CRM GP

http://www.amllp.com/microsoft-dynamics 925-790-2600

Armanino CFMD

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#### DynamicPoint CRM GP NAV

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Portals, Business Automation & Custom Products integrated with Dynamics.

#### **≫Social Media**

#### The Partner Marketing Group

AX CRM GP NAV SI

http://www.thepartnermarketinggroup.com 732-237-8795

**Butterfly Publisher** 

Join Dynamics partners on Butterfly, a publishing & lead capture platform that makes your social, blog & newsletter marketing more effective!

#### Software Development Consulting

Isis, Inc. CRM GP POS RM SL http://www.isisinc.com • 804-762-4200

**Isis Consulting** 

Isis provides cost effective outsourced software consulting to design, build, & test the software your clients need worldwide at reduced rates as low as \$20 per hour depending on project size and skill set required!

#### KTL Solutions, Inc. CRM GP

http://www.ktlsolutions.com • 866-960-0001

**Development - Microsoft** Dynamics GP/CRM/xRM

15 yrs developing GP customizations (Dexterity, .Net), Source Code Developers, Experts with CRM/xRM as a platform creating customized experiences. Sub-contractor rates to other resellers.

#### ⇒Strategic Services

#### mcaConnect AX CRM

http://www.mcaconnect.net • 866-622-0669 mcaConnect Strategic Services

Strategic Services allow our clients to strategically leverage technology to achieve competitive supremacy. Offerings include: business transformation, Lean/manufacturing excellence, and Strategic BI services.

#### **→ Upgrades**

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Armanino CFMD

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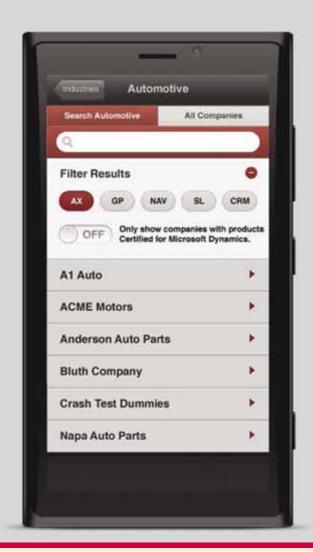
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## UPCOMING Microsoft

Dynamics CRM 2015 Microsoft Dynamics CRM 2015 will be here soon! Stay up to date on our Microsoft Dynamics CRM 2015 web page as we share the latest blog posts, webinars, boot camps, and other educational materials related to this anticipated release. Visit: PowerObjects.com/ctm2015

Convergence 2015 Mark your calendars for Convergence 2015-Microsoft's premier annual conference for Dynamics products. The conference will be held bynamics products. The conterence will be need from March 16-March 19 in Atlanta, Georgia. PowerObjects will be a gold sponsor again this year and we hope to see you there!

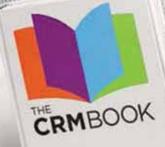
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