



## M-Files Easy Document Management Software Connects With Microsoft Dynamics CRM

*M-Files integration with popular Microsoft Dynamics CRM solution ensures instant access to any customer-related document.*

**DALLAS, June 29, 2010:** Motive Systems, the developer of [M-Files](#) easy [document management software](#), announced the availability of M-Files for Microsoft Dynamics CRM. This powerful combination enables businesses to enhance Microsoft's popular customer relationship management (CRM) software with professional [document management](#) functionality so that any document associated with any customer record is instantly available to users of the CRM software.

Businesses of all sizes have adopted CRM software to improve their interaction and communication with customers. While CRM software is well suited for managing and tracking these customer interactions, documents also play a key role in any businesses relationship. Whether it's a presentation, proposal, contract, purchase order or invoice, a business interaction generally involves a document; something a CRM system is not designed to manage. To solve this problem, primitive document management features are typically "bolted on," but often with key capabilities missing such as fast, full-text search; version tracking; automated workflow; document check-in/check-out; and seamless connections with document sources such as scanners and email systems.

"M-Files for Microsoft Dynamics CRM is part of a larger strategy to deliver complete and easy-to-use document management to a variety of application segments," said Greg Milliken, general manager of Motive Systems. "In the case of CRM, interactions with customers or prospects are often centered on a document, such as a sales proposal, a contract or an invoice. This sort of 'document-driven' interaction is very common, and since CRM systems are not designed to handle documents, this critical aspect of the process becomes cumbersome and inefficient, making using the CRM system far less productive than it could be. We're focused on addressing this issue by bringing best-in-class document management to Microsoft Dynamics CRM, which yields a total solution that ensures companies get the most from their CRM investment."

### **Marries the key benefits of CRM and advanced document management**

The tight integration between M-Files and Microsoft Dynamics CRM means businesses get the best of both worlds: a complete solution that enhances their CRM system by efficiently organizing, managing and linking documents associated with customers, sales activities and related objects. M-Files makes it easy to tag any document to associate it with any customer or Dynamics object, enabling the document to be opened and accessed from within Dynamics or directly from the M-Files vault via its familiar Windows Explorer interface.

For instance, an email sent to a customer with an attached proposal or sales brochure can be tagged to the customer. Later, the original email in its native Outlook format with the attachment can be opened directly from the customer in Dynamics. Moreover, if one doesn't need to access Dynamics and simply wants to review emails sent to customers, it is easy to directly search the M-Files vault without launching Dynamics to retrieve a single email, or all emails sorted by customer.

Key features offered by M-Files for Microsoft Dynamics CRM:

<sup>35</sup>/<sub>17</sub> Replication of accounts, contacts and other objects from Dynamics to M-Files

<sup>35</sup>/<sub>17</sub> Access Dynamics data from within M-Files, and M-Files documents from within Dynamics

<sup>35</sup>/<sub>17</sub> Fast, full-text searches on any tag or word contained in any document

<sup>35</sup>/<sub>17</sub> Support for all file types and Windows applications using standard "File Open" and "Save" commands

<sup>35</sup>/<sub>17</sub> Tag (attach) any M-Files document to any customer or product in Dynamics

- <sup>35</sup><sub>17</sub> Version history is automatically maintained for Dynamics objects as well as M-Files documents
- <sup>35</sup><sub>17</sub> Offline access ensures documents and records are always available, even when a network connection is unavailable, such as when traveling
- <sup>35</sup><sub>17</sub> Secure access permissions can be set for all documents
- <sup>35</sup><sub>17</sub> Workflow and notifications automate common business processes, such as proposal reviews or contract approvals
- <sup>35</sup><sub>17</sub> Direct integration with Outlook, SharePoint and other external systems such as an ERP or billing system.

### **True, professional document management that is both easy and affordable**

[Document management software](#) has traditionally been complicated and expensive, requiring significant investments in the software as well as the IT resources to configure and maintain it. In addition, solutions usually entail major changes in business processes that require costly user training. By offering a DMS that is both easy to use and affordable, M-Files makes this efficient office-management technology accessible to any business – especially smaller businesses. M-Files provides advanced [document management features](#) such as fast search, automated version control, secure access permissions, document check-in and check-out, and support for email and connections to other office systems such as a CRM, accounting or billing system.

For more information and pricing, contact M-Files sales via email at [sales@m-files.com](mailto:sales@m-files.com), or by phone at (972) 516-4210 or (800) 224-4074. A free trial of M-Files is also available via the M-Files web site at <http://www.m-files.com/try>.

### **Where to find M-Files around the Web:**

M-Files [website](#), [blog](#), [Facebook](#), [Twitter](#) — [@m\\_files](#)

### **About Motive Systems**

Motive Systems Inc. develops easy-to-use, professional [document management software](#) that enables companies and organizations of all sizes to make dramatic gains in efficiency and productivity by improving the way they organize and manage their business documents, information and processes. More than 50,000 licenses of the company's products have been sold to over 3,500 customers in more than 60 countries worldwide. The company's flagship product, [M-Files](#), is available in 15 languages and is in use at customers such as AstraZeneca, BSA LifeStructures, EADS, FinnComm Airlines, Parker Hannifin, and Thales. Motive Systems also offers M-Files Express, the only completely free, professional document management software on the market. For more information, please visit [www.m-files.com](http://www.m-files.com).

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