

## The Complete Microsoft Excel Solution for Microsoft Dynamics CRM

With Apttus X-Author's comprehensive suite of solutions, everyone in your organization can use Microsoft Excel and Microsoft Dynamics CRM together to dramatically boost productivity and increase user adoption. Admins can now work in Excel to maintain and migrate data in record time while business users can get work done at Excel speed. Excel just becomes the user interface for Dynamics CRM. All data, permissions, rules and routing are centralized in Microsoft Dynamics CRM.

## Build Your Own Microsoft Dynamics CRM User Experience in Excel

Customers can build and customize their own X-Author Applications to work with Microsoft Dynamics CRM data in Excel by using one or more of the X-Author products below. These products require no programming and users can easily get started in just 5 minutes.



### X-Author Enterprise

Ultimate Excel user experience for Microsoft Dynamics CRM.

- Create a completely customized experience using new or existing workbooks
- Use unlimited entities simultaneously in any layout, any workbook and across unlimited worksheets
- Update parent-child records on the same Excel row
- Support for auto-macro execution, attachments, online and offline lookups from any cell, querying, searching and filtering, and complex entity hierarchies



### X-Author Power Admin

Industry-leading data administration and migration for Microsoft Dynamics CRM using Excel.

- CRUD for unlimited entities simultaneously across unlimited worksheets
- Reduce org-to-org data migration by 80%
- Compare data across Microsoft Dynamics CRM orgs in a single workbook



### X-Author Reporting

Unparalleled Microsoft Dynamics CRM data access inside Excel.

- Point-and-click queries using unlimited entities simultaneously into unlimited worksheets
- Exceptional user filtering
- Standard Excel reporting and analytics functionality



### X-Author Essentials

High speed record editing/creating using Excel.

- Any Microsoft Dynamics CRM list of records
- Up to 2 entities per app including a parent entities
- Wizard app creation in less than 2 minutes
- Launch from Excel or Microsoft Dynamics CRM
- Work offline and sync when reconnected to Microsoft Dynamics CRM

### Business Users

- Increase Microsoft Dynamics CRM productivity and adoption
- Move Excel spreadsheets onto Microsoft Dynamics CRM
- Work offline and sync when reconnected

### Admin Users

- Faster data loading and maintenance
- Streamlined data migration

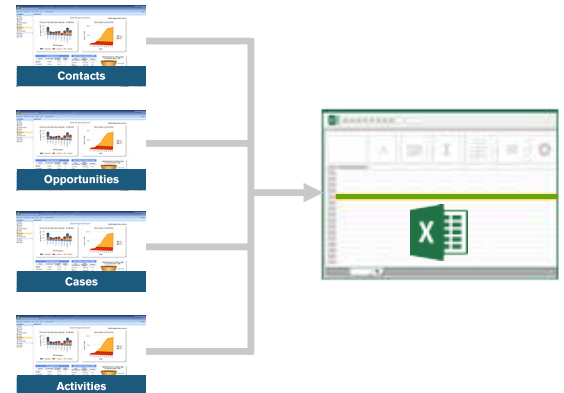
## X-Author Pre-Configured Applications

If a custom-built solution isn't the right route for your company, take a look at these complete X-Author Applications that are ready to run right out of the box. All are easy to configure and customizable to add other fields and related entities.

### Microsoft Dynamics CRM Account Management

With this all-in-one App, sales users can easily manage their Account-related data in a single workbook.

- ✓ View, update and add Opportunity, Activity, Contact, and Case data by Account
- ✓ Access only the information you need to be more efficient



### Microsoft Dynamics CRM Opportunity Management

Allows sales users to manage Microsoft Dynamics CRM Opportunities and related entities, directly in Excel.

- ✓ Sales Managers no longer receive standalone Excel forecasts
- ✓ Users can retrieve all Opportunities or a subset based on Account or any other field
- ✓ Includes charts and reporting in Excel



### Microsoft Dynamics CRM Campaign Management

Streamlined control over Microsoft Dynamics CRM Campaigns and Campaign Members.

- ✓ Bulk load Contacts and Campaign Members simultaneously
- ✓ View all Campaign Members and mass update any standard or custom field in Excel



### Microsoft Dynamics CRM Quoting in Excel

Sales users can create new quotes or modify existing quotes right from Excel. Uses standard Microsoft Dynamics CRM entities and fields but can be configured to use local Excel pricing and other fields.

#### Quote Flow:

- 1 Select an Opportunity, Price Book, and Product
- 2 Excel populated with list prices
- 3 Edit quantity and/or discount and add/delete products
- 4 Save Quote
- 5 Generate quote in Microsoft Dynamics CRM using standard PDF Quote template