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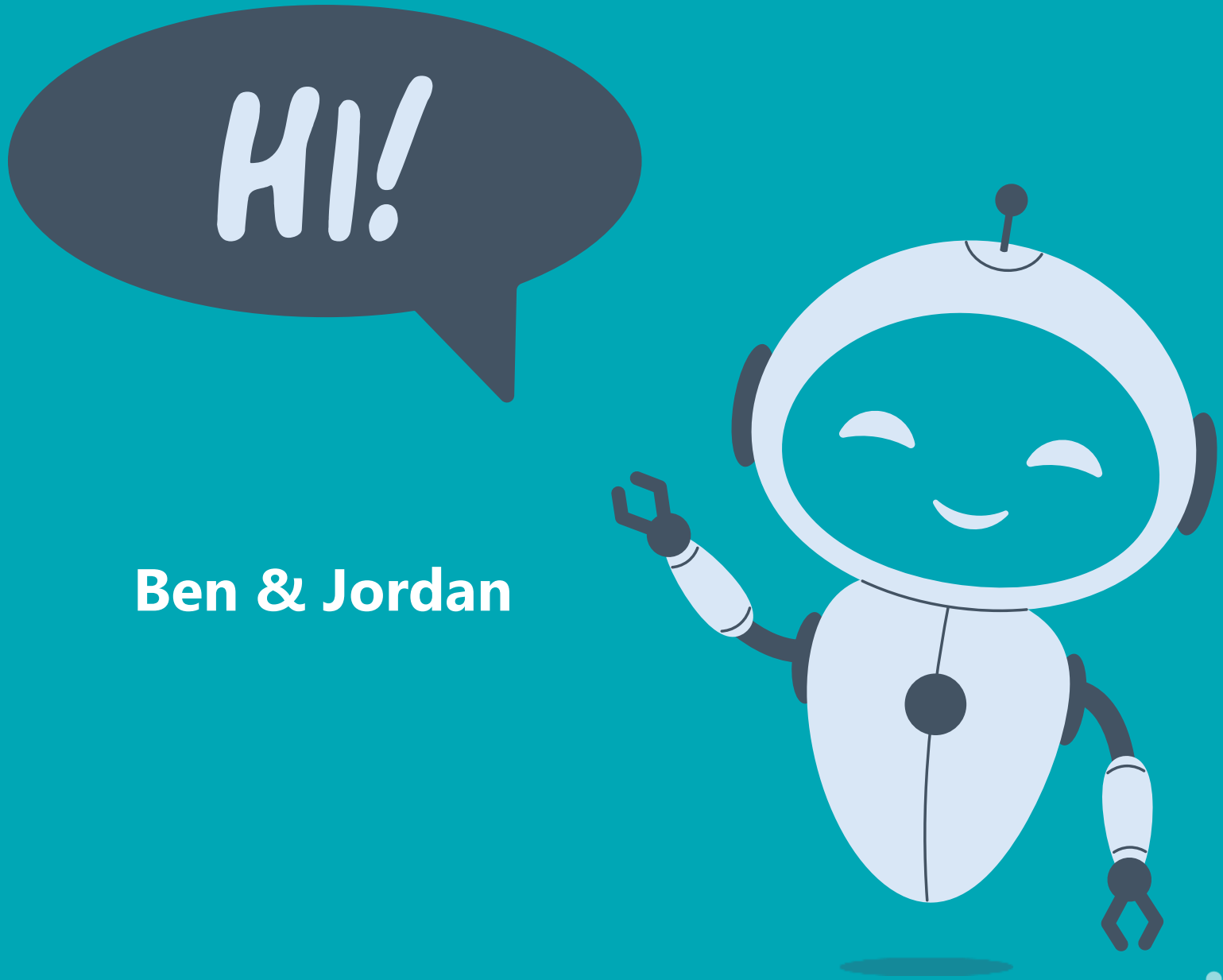
CRM connect

CRM & Power Platform 3rd Party Add-ons

THURSDAY 15th MAY 2025



Ben & Jordan

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What are 3rd Party Tools and why do we use them?

- The core product doesn't have the functionality built in.
- The functionality in the core product is poor.
- A 3rd Party addon offers a better and more put together experience.
- Building the functionality in house is not cost affective or no one in the business has the technical skills.
- Using a verified 3rd party tool (on App store) is controlled, supported, updated and managed.

3rd Party Addon can assist with the following.

- Built in templates are restricted to what we need (MSCRM Addons –Documents Core Pack)
- Storage keeps on increasing with no way to stop it (MSCRM Addons – Email Extractor)
- Capturing Signatures for important documents (DocuSign)
- Extended data visualisation of delivery routes, territories and assets in a map view. (Maplytics).
- Manual Data entry just isn't enough (Validating Data – Data 8)

MSCRM Addons - Documents Core Pack

www.mscrm-addons.com

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Dynamics CRM Templates

- Included as part of Core CRM.
- The ability to create Microsoft Word, Excel and PDF Templates for OOTB and Custom Tables
- The ability to standardize company communication and branding
- Staff save time in sending dynamic information to customers
- Examples of common use
  - **Company Terms and Conditions**
  - **Contract Agreements**
  - **Quotes**
  - **Terms of service**
  - **Mail Merge**
  - **Excel Sales Figures**
- The ability to have personal or organisational templates
  - Organisation Templates - Centrally managed
  - Personal Templates – Created, managed and shared by users

Disadvantages of OOTB Templates

- Organisational templates cannot be tied down to specific staff members.
- Unable to dynamically select a template based on CRM record information.
- What you add to the template appears regardless.
- Only surfaces data from CRM
- Multiple templates are required for different information.
- Unable to link dynamic images. Example might be a picture of the product on quote.
- Word Designer - Can be clunky at times.
- A requirement to keep the templates saved outside CRM if they need to be updated at a later date.
- Only supports access to data one relationship deep.
- No dynamic logic to hide/show fields based on CRM data.

Advantages of MSCRM Addon Documents Core Pack

- Templates are centrally managed outside CRM.
- **Ability to use logic to hide or show fields based on CRM data**
- **Ability to dynamically insert images based on CRM data**
- **Can access and display information/images from multiple locations (outside of CRM**)
- **Ability to link directly with DocuSign or other E signature software**.
- Apply security around what templates users can access.
- Export to Word , Excel or PDF
- Save directly to SharePoint. (automation – workflows)
- Supports the ability to display information more than one layer down the relationship.
- **Supports Quick run templates**
- **Supported by MSCRM Addons as part of the subscription**
- **New updates and features added with each version.**

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Documents Core Pack Demo

MSCRM Addons - Email Extractor

www.mscrm-addons.com

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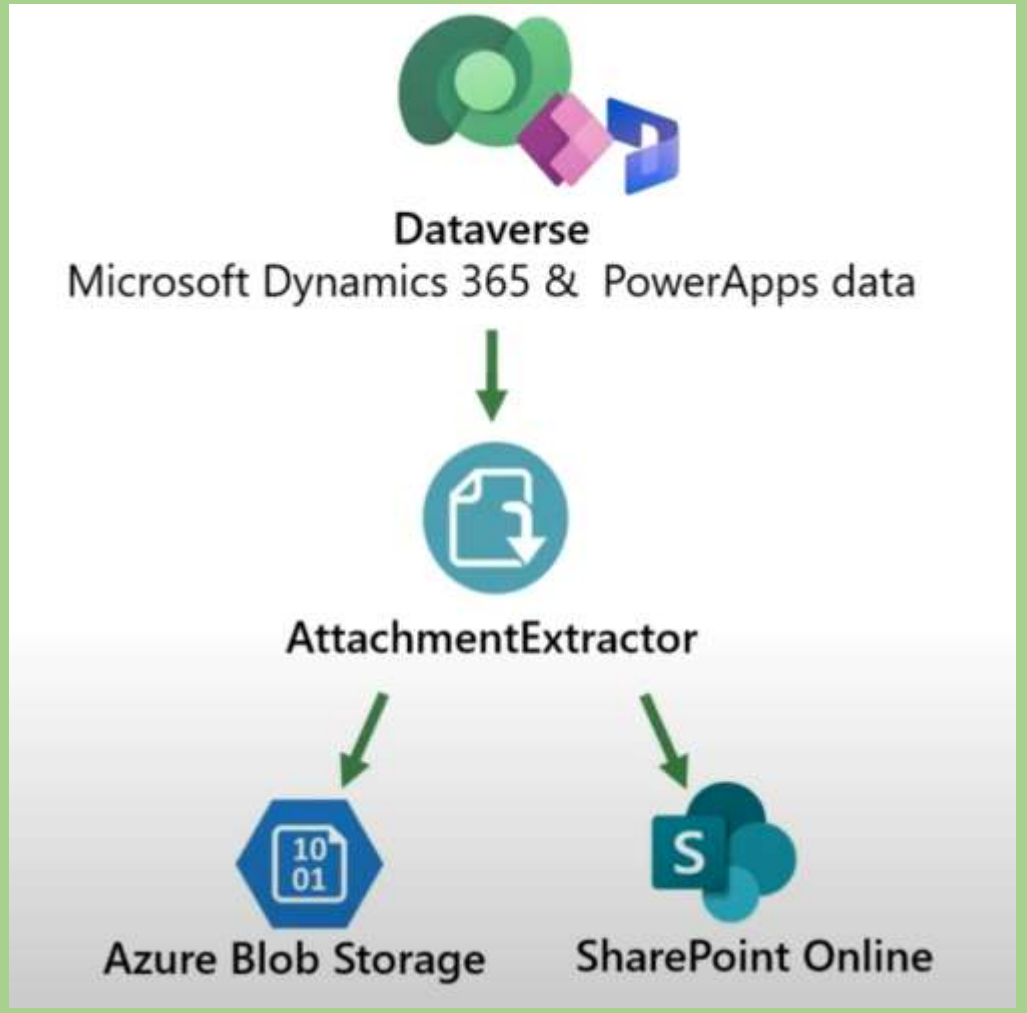
Why use MSCRM Addons Email Extractor

- Moving data to Azure Blob storage/SharePoint greatly reduces Dataverse storage capacity.
- Offloads Images in emails and attachments (email, notes, task) to SharePoint
- Run of demand or on a schedule. (Don't run it in the middle of the day ☺)
- Unchanged user experience for data that has been moved. (emails still appear on the timeline in plaintext)
- Data moved to blob storage is downloaded on demand (when the email is opened).
- Email extractor service can be self hosted or managed by MSCRM Addons



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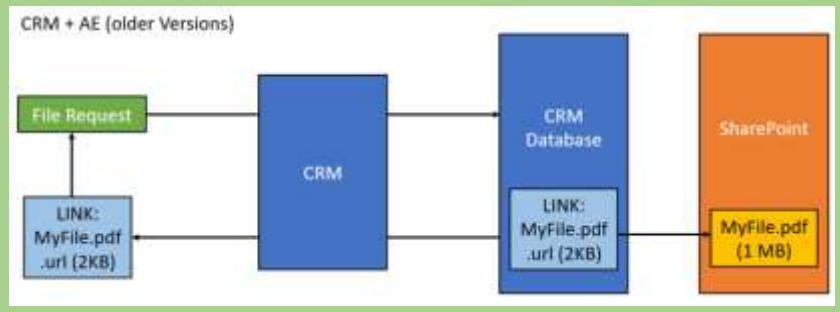
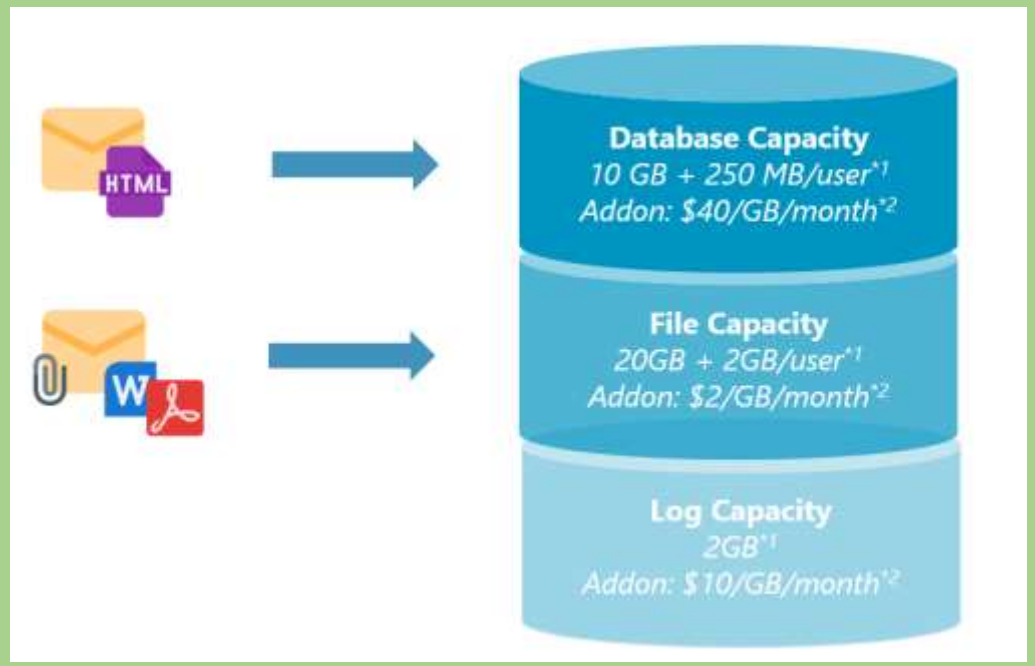
Why use MSCRM Addons Email Extractor

- Apply filters to what data you want to move based on attachment size or age of the email
- Cost Saving Calculator on the website.
- Video overview of the Email Extractor Tool





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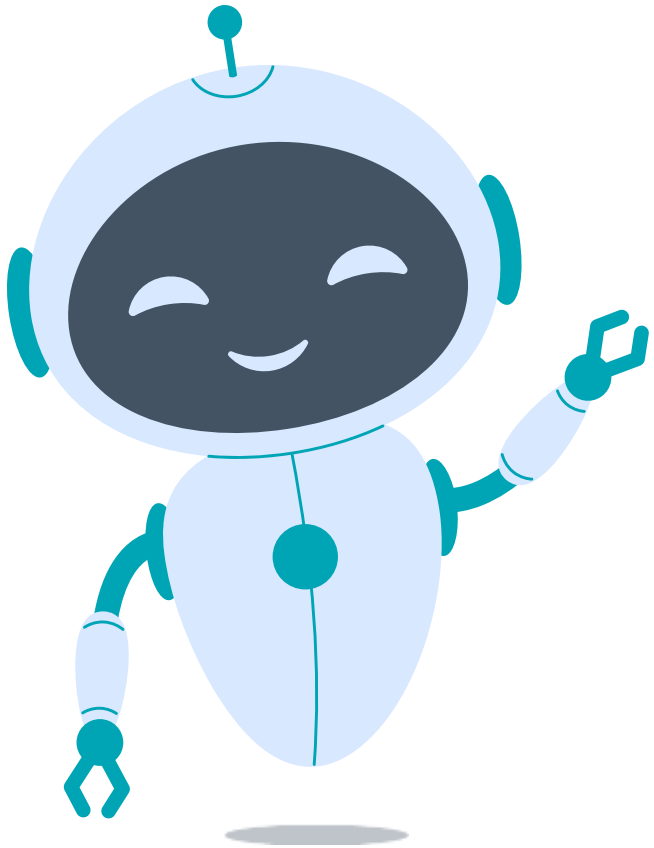
DocuSign (Electronic Signatures)

www.docusign.com

Why use docusign

- OOTB Dynamics CRM has no inbuilt solution for capturing electronic signatures.
- Verified App on App Source & Supported by DocuSign.
- Subscription based licence (dependant on number of signed envelopes) in Tiers
- Native integration with Dynamics CRM and can be used for any scenario where a signature is required.
  - NDA
  - Service Contract
  - Sales Agreement
  - Certification
  - Quotes
- Templated Documents can be sent directly from CRM and are automatically captured in SharePoint when signed.
- Can be used with other 3rd Party tools such as Document Core Pack or Smart flow (Experlogix)

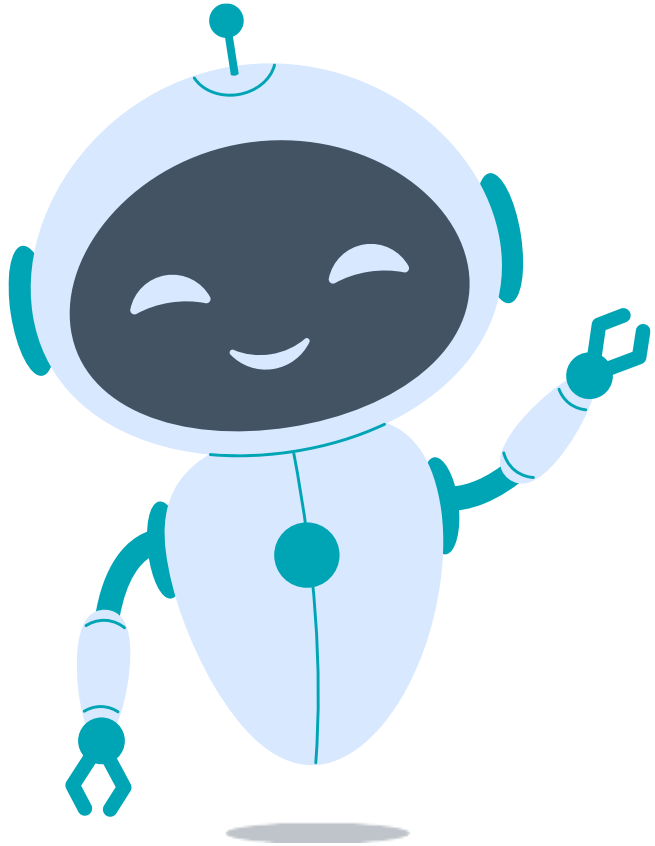


DocuSign Demonstration

Maplytics
www.maplytics.com

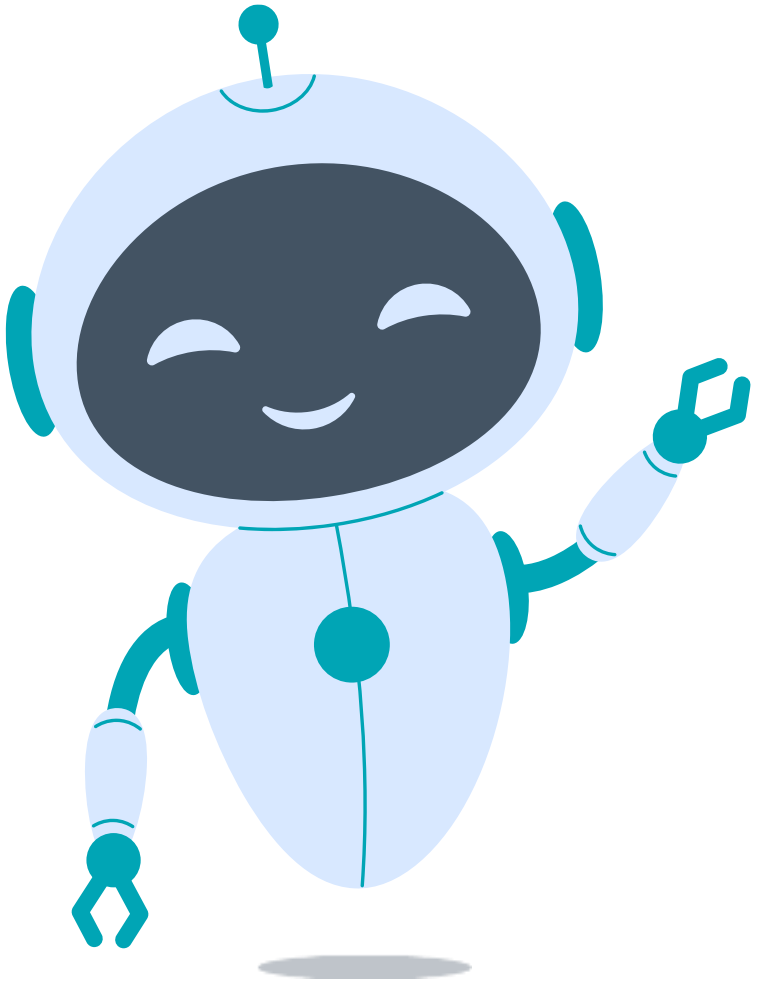
Why use maplytics.

- Direct integration with Dynamics CRM
- Enhance the use of tracking accounts/activities/custom tables.
- Allows visualisation of CRM data in a Map view.
- Subscription based (Tiered based on No of Users)
- Uses Azure Maps API or Google Maps API



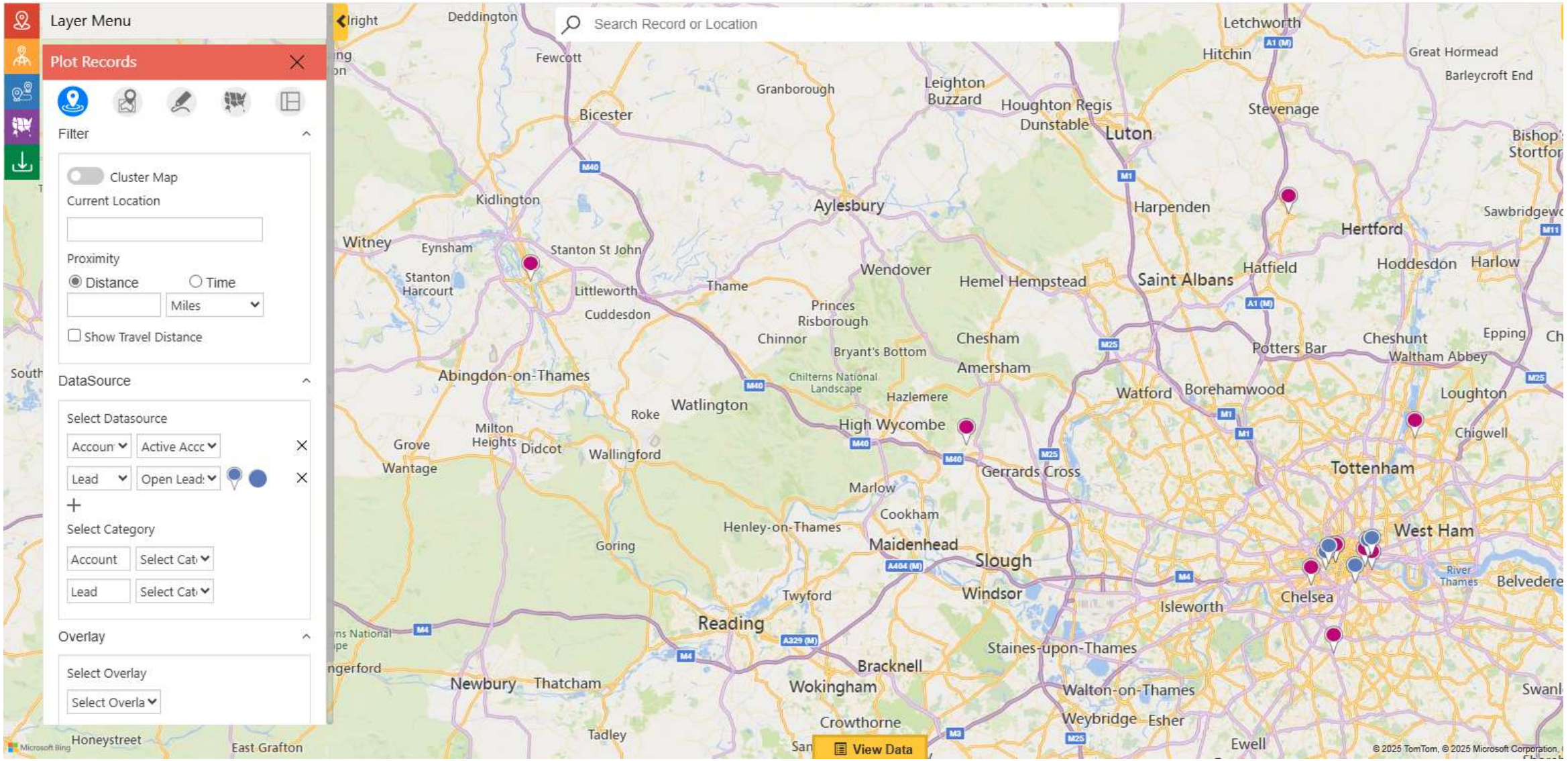
Use cases for maplytics.

- View accounts based on revenue
- Track assets in a map
- See engineers in radius of your customer
- Where in country are my open /leads/opportunities/quotes so I can look to close them.
- Plan optimal routes with standard map functionality (amenities etc)
- Save your most used routes to customers and see the mileage – used saved routes
- Visualise Territories in a map view.
- Visualise on a map all the customers I haven't visited in the last 3 months.
- Visualize top performing areas in a heat map



Maplytics Demonstration

Maplytics



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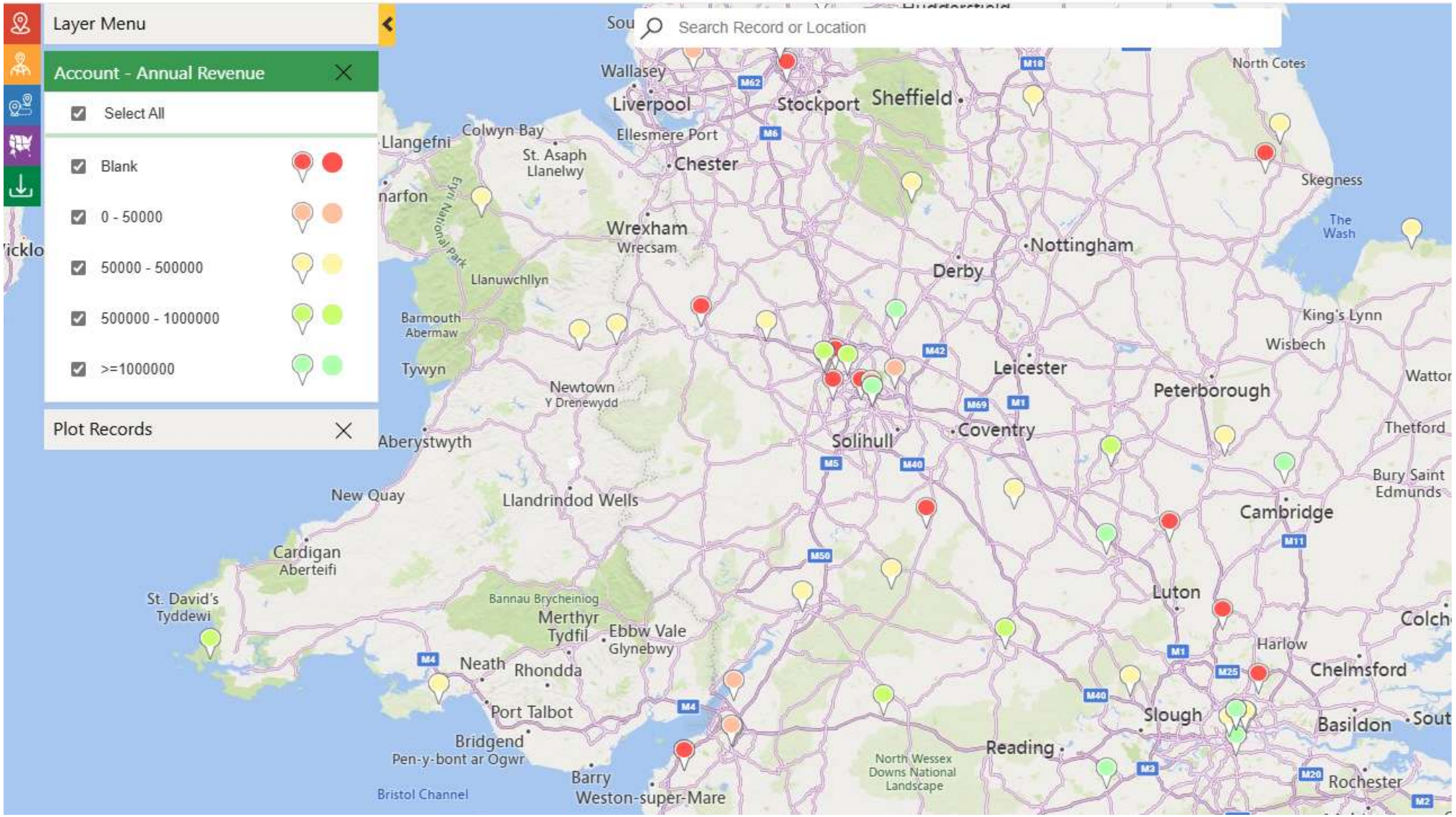
Maplytics



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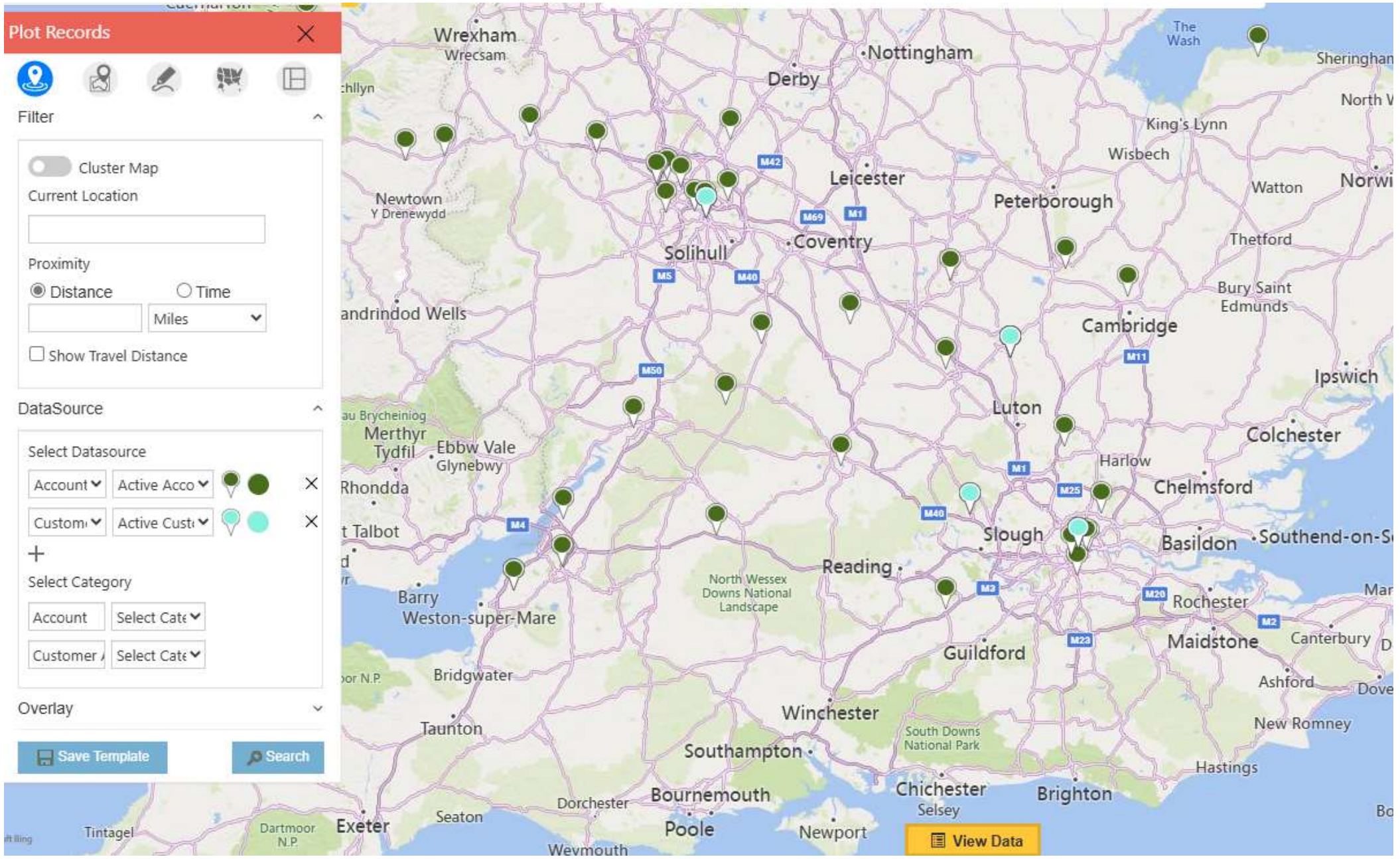
Plot Records
Filter
Cluster Map
Current Location
Proximity
Distance
Time
Miles
Show Travel Distance
DataSource
Select Datasource
Account
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Custom
Active Cust
Select Category
Account
Select Cate
Customer
Select Cate
Overlay
Save Template
Search
View Data
Wrexham
Wrecsam
Nottingham
Derby
Leicester
Newtown
Y Drenewydd
Solihull
Coventry
Peterborough
Cambridge
Luton
Ipswich
Colchester
Harlow
Chelmsford
Basildon
Slough
Reading
Guildford
Rochester
Maidstone
Canterbury
Ashford
New Romney
Hastings
Brighton
Chichester
Selsey
Bournemouth
Poole
Southampton
Winchester
Taunton
Bridgwater
Barry
Weston-super-Mare
Merthyr Tydfil
Ebbw Vale
Glynebwy
Rhondda
Talbot
Exeter
Seaton
Dorchester
Weymouth
Newport
Tintagel
Dartmoor N.P.
North Wessex Downs National Landscape
South Downs National Park
The Wash
King's Lynn
Wisbech
Watton
Thetford
Bury Saint Edmunds
Sheringham
Norwich
M1
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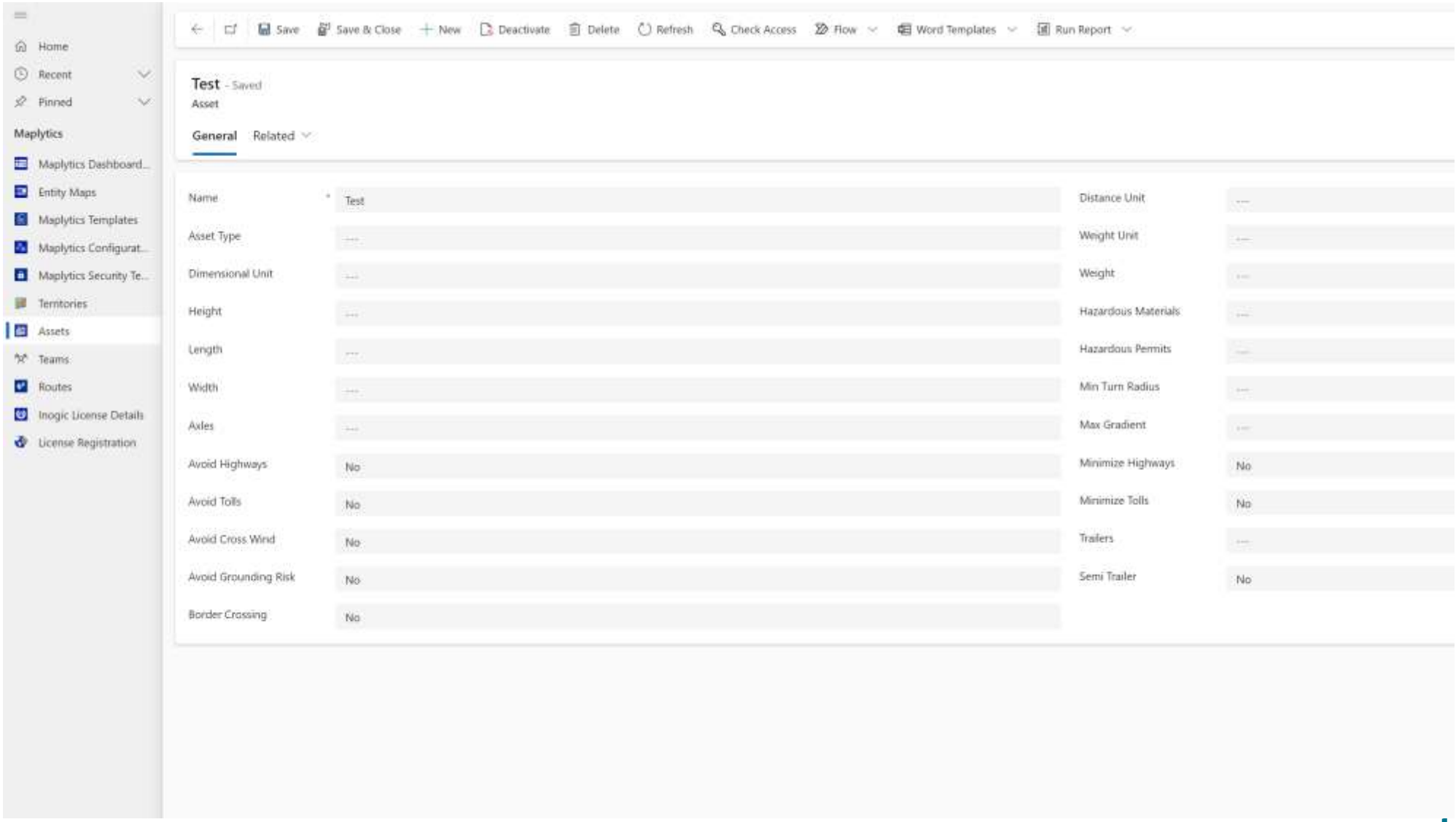
Asset - Maplytics



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Data8

www.data-8.co.uk

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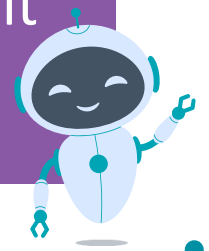
Why use data8?

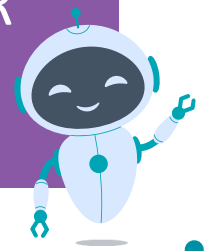
When data is everything the data 8 verifies the following…

- *Predictive Address - Allows a user to start typing from any point of their address. A list of suggested addresses is then generated, in real-time, for them to choose from.
- *Email Address validation - checking for typos, fuzzy logic and spelling mistakes in both the username and domain parts of the address.
- Phone Number - goes beyond checking the length of the number; it verifies whether it’s callable & identifies information such as its type and network
- Bank Account Verification – When a customer enters their sort code and account number, we check if the details are correct, the account is direct debit capable, and CHAPs supported.



Why use data8?

- Telephone Preference Service - Allows you to check telephone numbers against the TPS register in real-time. Screen numbers before calling or on a scheduled basis. CTPS checks available in addition.
- Duplicare - Duplicare™ was designed to dedupe, merge, and standardise multiple records all at once.
- Data integrity - measure & monitor data quality over time, whilst creating specific data quality scores against fields important to you.
- Business Insights - an provide details such as full address, SIC code, company structure, turnover, number of employees and credit rating.
- Provenance - reduce your risk of costly legal fines, and become entirely GDPR compliant, with Data8's data audit trail solution

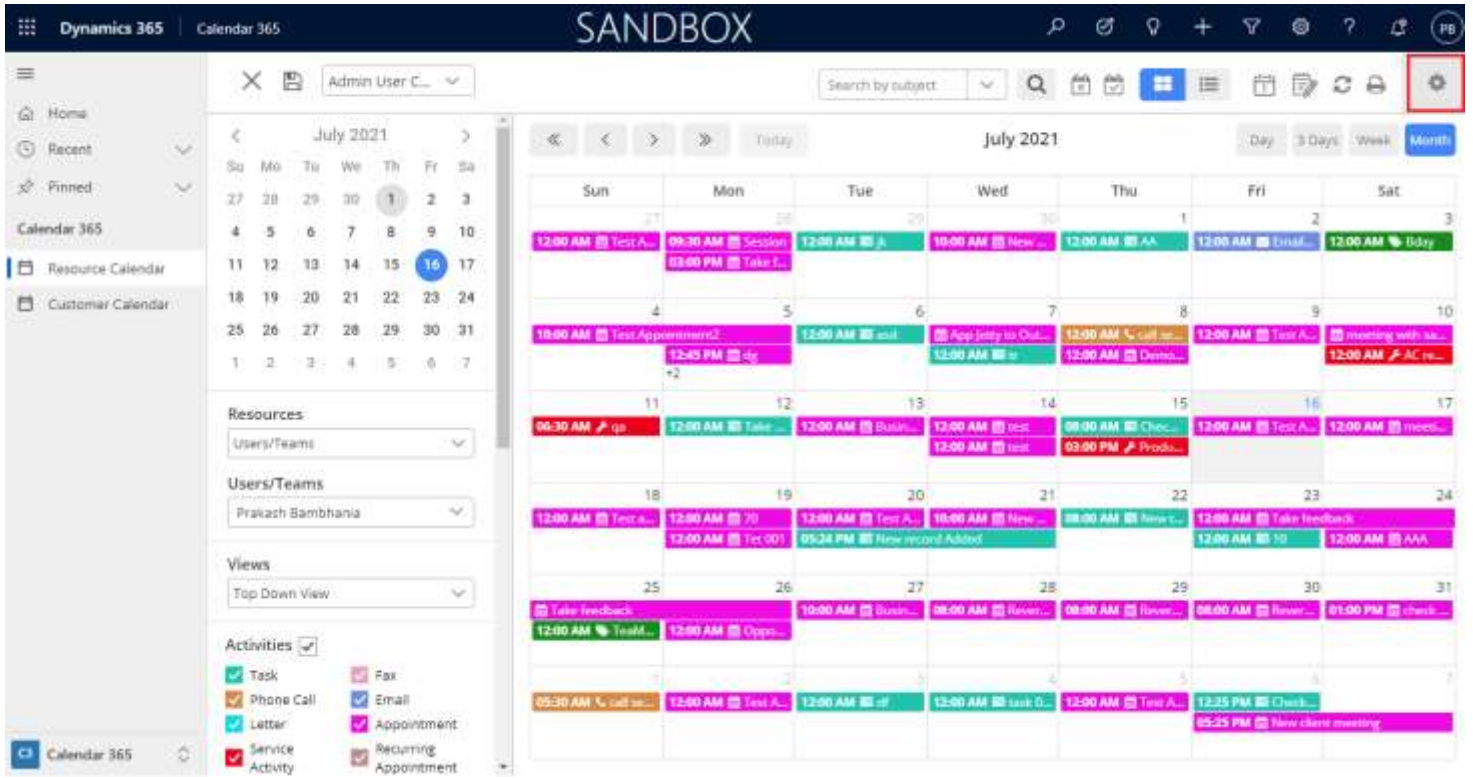


Data8 Demonstration

Other Notable Mentions

Calendar 365 For Dynamics CRM

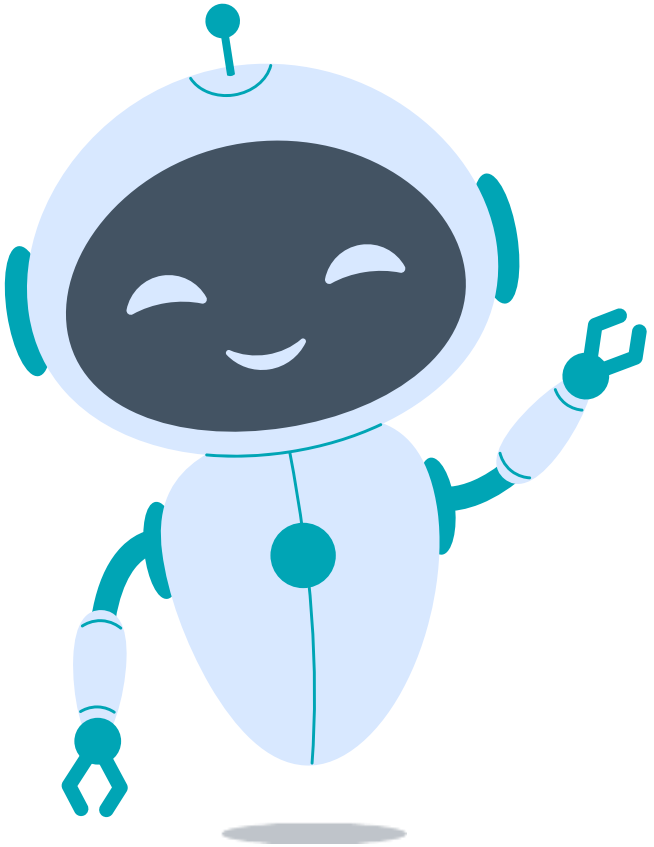
- The ability to drag calendar entries within CRM.
- visualization of resources and their availability
- different types of views like Top Down, Gantt, Timeline, and Agenda views
- Supports Custom tables
- More information can be found at
- https://www.appjetty.com/dynamics365-all-in-one-calendar.htm

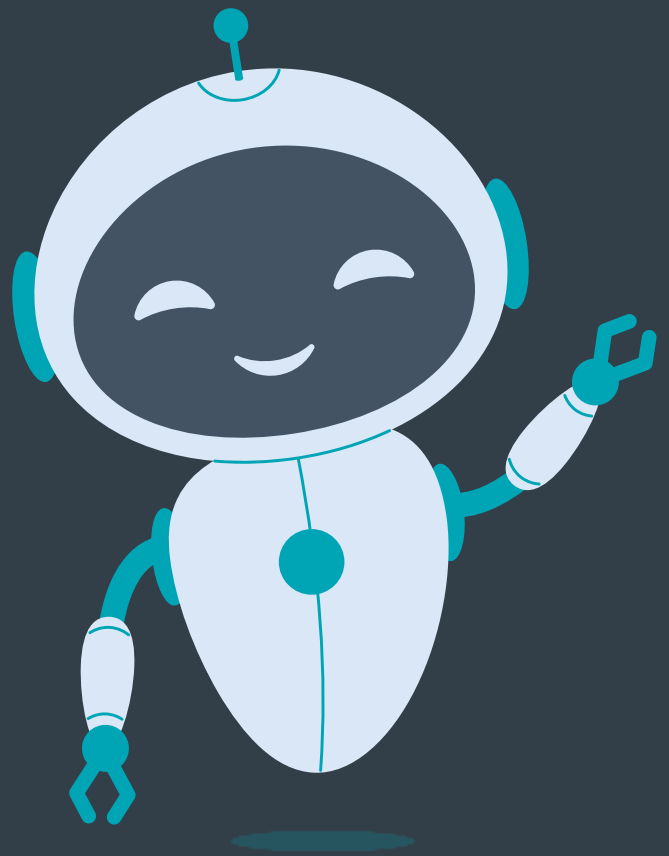


Other Notable Mentions

- D365 Shrinky - Synchronicity Technology Services – An alternative solution that reduces activity pointer table.
- Activity Tools – MSCRM Addons - Outlook-like interface within the Dynamics 365 platform
- Account Management Framework – Tecman – Centralise and Automate Customer Appointments, follow ups and discussion Points
- Non Conformance Framework – Tecman – Manage non conformance, preventative actions and CAPA actions from a Model Driven app and a Canvas app on a mobile Device.
- WhatsApp4Dynamics – Inogic - send and receive WhatsApp messages and notifications directly within the Dynamics 365 interface.
- Marketing4Dynamics – Inogic – Directly links with Mailchimp to allow you to sync marketing list, unsubscribes, and business insights.

-marketing-4-dynamics





Thank you!

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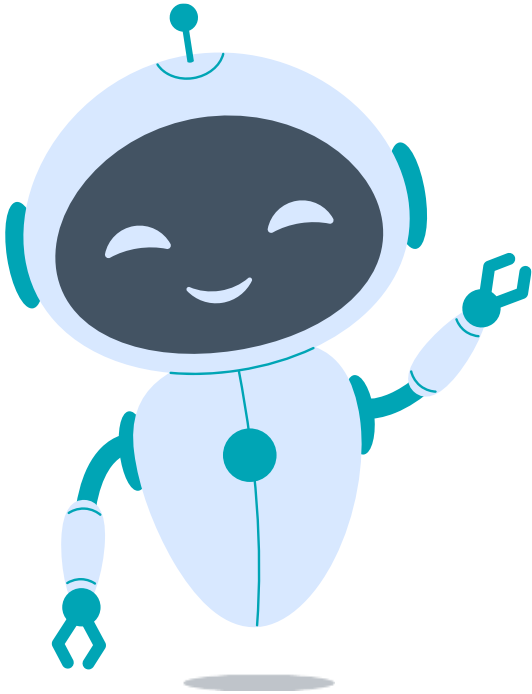
THURSDAY 15th MAY 2025

Pricing

Mscrmaddons - Documents corepack	M/Y	Per User (1-10) Monthly £67.33 / Yearly £673.28 + Additional Per Documents Cost monthly £7.57
Mscrmaddons - Attachments	Y	Per User (1-10)£673 / (81 - 140) £1893
Docusign	M/Y	Per User - Monthly £34 / Yearly £240
Inogic - Maplytics	Y	Per User (1-50) Monthly £9.26 / Per Use (101-250) £7.15
Data8 - Validation	Y	Per Lookup Depends on Validation type between £25 - £60 with 1000 looks ups - Others need quotes to verify
Calendar 365	Y	Per User (10 Users £44.21) (£442.1) / Per User (51-100 Users- £26.23) (£1337.73)
D365 Shrinky	6M	£199
mscrmaddons - Activity Tools	M/Y	Per User - Monthly £2.10 / Yearly £40.40
Tecman - Account Management Framework	ONE OFF	£3995
Tecman - Non-Conformance	ONE OFF	£3405
Inogic- WhatsApp4Dynamics	Y	Per User (1-50) Monthly £9.26 / Per Use (101-250) £7.15
Inogic - Marketing4Dynamics	Y	Per User (1-50) Monthly £605 / Per User (101-250) £1817



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