

# FileBound + Microsoft Dynamics CRM®

## Integrate FileBound into Microsoft Dynamics CRM.

Integrating FileBound within Microsoft Dynamics CRM provides document capture, storage and retrieval capabilities to Dynamics CRM users.

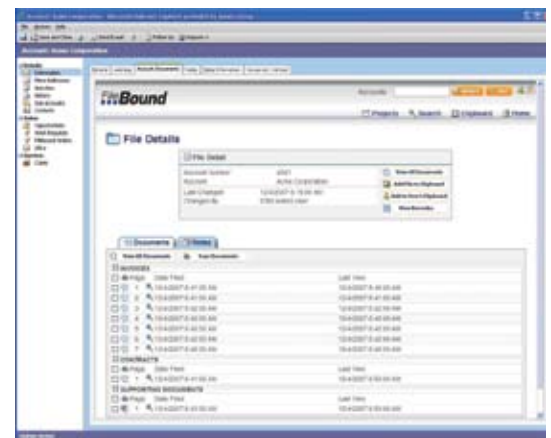
### FileBound + Dynamics CRM Integration Provides:

- » Document capture, storage and retrieval to entities in Dynamics CRM (leads, accounts, contacts, cases, custom entities, etc.). Any electronic document (tiff, jpg, doc., xls., avi., etc.) can be stored in FileBound.
- » Single step data entry – the creation of an entity will create a related file in FileBound for document storage. For example, when you create an Account in CRM, a corresponding file is created in FileBound, allowing you to easily and securely store and retrieve your documents in that file.
- » A configurable solution that provides document imaging only to the entities you define, with key fields that are specific to your business.

The FileBound Content Management Solution provides easy to configure workflow, and e-form functionality out of the box. The integration with Microsoft Dynamics CRM extends this functionality to your DynamicsCRM users.

### Benefits of FileBound Integration:

- » The FileBound usage based licensing model allows you to extend secure document management functionality to all your CRM users.
- » Ability to access related documents through the CRM interface, without leaving your CRM system.
- » Ability to link all documents related to any entity in CRM.
- » Instantly access documents related to an entity with a single click.
- » Seamlessly print, email, or route a document from within the CRM interface.



FileBound Document List Displayed within CRM



FileBound Document Viewer Initiated From Within CRM to Display Related Documents

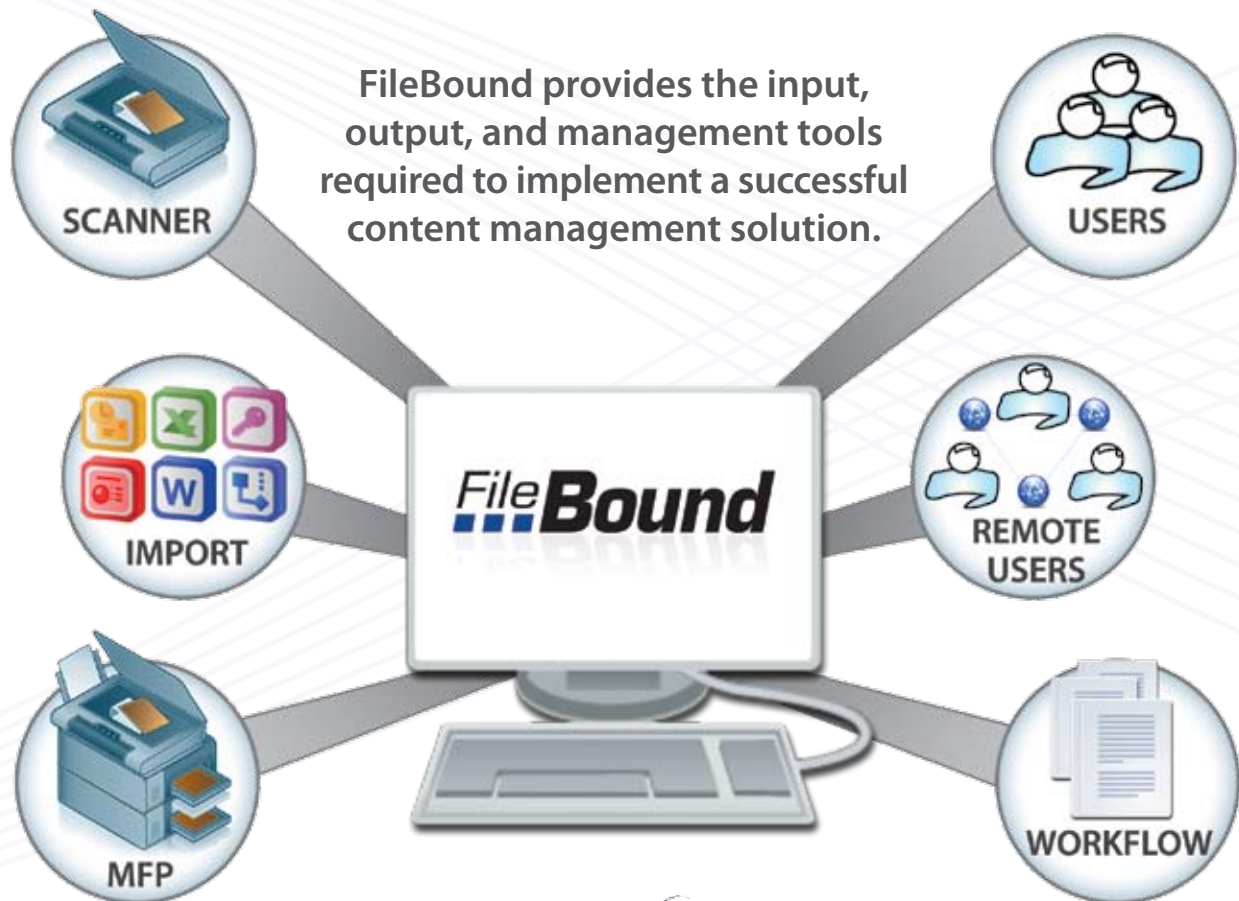
FileBound is an affordable web-based content management solution that can be licensed for local deployment or outsourced as an ASP service. Our scalability and unlimited user pricing model allows FileBound to serve a much broader market segment than other ECM solutions. FileBound inherently supports both centralized and distributed scanning for document imaging, is integrated with the Microsoft Office Suite, provides a customizable e-forms module, and supports configurable workflow functionality.

FileBound is built on the Microsoft .NET 2.0 framework. The fully exposed FileBound Object Model provides programmatic access to all functions and features of the FileBound system. In fact, the entire FileBound ASP.NET web application, administrative module, and other core applications were developed using this Object Model.

All data is accessed through the Object Model via objects and collections, making new development and enhancements easy to create and maintain. Most objects are inheritable and are therefore extendable for virtually any purpose.

#### FileBound Differentiators:

- » Unlimited Users Pricing Model
- » Unlimited Workflows
- » Hosted ASP or Premise Based Licensing
- » Centralized or Distributed Document Scanning
- » MS Office Integration
- » External Integration using Web Services
- » Easy to Configure Web Parts for SharePoint Integration



**MAREXGROUP** INC.

1701 Cushman Drive, Unit 1 | Lincoln, NE 68512  
Phone: 402.436.3060 Fax: 402.421.2524 | [www.filebound.com](http://www.filebound.com)

*Microsoft, Dynamics CRM and .NET are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.*