



DDI-Connect™ Future Microsoft Office Integration

2015 DDI USER GROUP MEETING
MAY 19TH-20TH

What Does Office Integration Mean?

- Outlook
 - Contacts
 - Email
 - Calendar Activities
 - Tasks
- Excel
 - Exportable reports
- Word
 - Mail merge



What are other CRM providers doing?



- **Salesforce.com**
 - Outlook – Contacts, Email, Calendar Activities, Tasks
 - Excel – Export reports
 - Word – Mail merge

What are other CRM providers doing?

blackbaud®

- **Raiser's Edge**

- Outlook – Contacts, Email, Calendar Activities, Tasks
- Excel – Export reports, Uses F9 for financial reporting
- Word – Mail merge

Note: Very complicated integration over 300 pages of instructions of how to install and use the office integration. Many COM Add-in and other data objects must be installed and configured correctly.



Common Problems



- Outlook must be open and running in order to sync (does not sync to the exchange server)
- Bi-direction syncing between Outlook to CRM and CRM to Outlook is problematic
- Connection/integration unreliable
- Cannot sync shared calendars
- Will only sync limited contacts (5,000 for Salesforce)
- Commonly used Outlook functionality does not sync (Categories)

What is DDI-Connect™ Future CRM doing?

Using a 3rd Party CRM Outlook Integration Tool

- DDI will develop custom DDI-Connect™ CRM integration for Outlook/Exchange and Office 365
- Riva Screen Examples:
- <http://www.rivacrmintegration.com/screenshots/windows-outlook/#4>



What is DDI-Connect™ Future CRM doing?

- Outlook / Exchange



- Contacts \leftrightarrow Constituents in DDI-Connect™ CRM
- Email \leftrightarrow Note/Memo in DDI-Connect™
- Calendar \leftrightarrow Activities in DDI-Connect™
- Tasks \leftrightarrow Process Steps in DDI-Connect™



What is DDI-Connect™ Future CRM doing?

- **Excel**
 - Exportable list views and reports
 - F9 Financial Report Generator for G/L
 - Session on Wed 12:30
 - DevExpress PivotGrid
 - https://www.devexpress.com/Products/NET/Controls/WinForms/Pivot_Grid/
- **Word**
 - Standard mail merge



Discussion, Questions, Comments



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