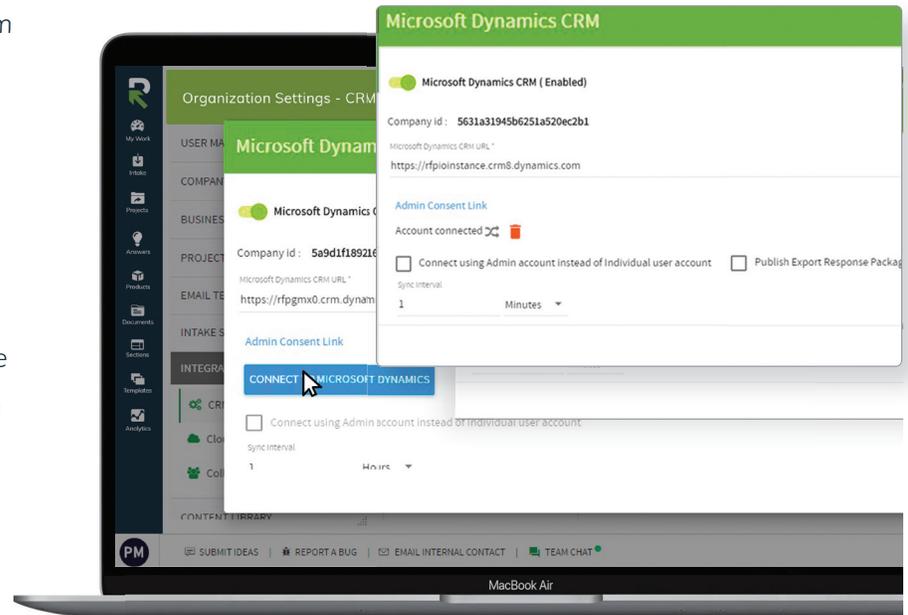


Microsoft Dynamics Integration

Connect your CRM to your response process



Your revenue teams are already rocking in Microsoft Dynamics CRM. Keep the momentum going by expanding proposal operations into the platform where sales teams already work: Dynamics. **Launch proposal projects, track progress, and enable self-service proposal services without ever having to leave Dynamics CRM.** Combining RFPIO and Dynamics CRM is the best way to expedite the proposal process and streamline collaboration between revenue and proposal teams.



Launch RFPIO projects in seconds

Initiate new projects with the click of a button on Deal, Lead, and Account pages in Dynamics CRM. Project, product, and client data captured in Dynamics is mapped seamlessly into RFPIO project fields—and sales reps can conveniently upload RFx files and supporting documentation in one place.



Always know the status of RFx projects

I-Frame viewing of RFPIO project status on Account, Lead, and Deal pages in Dynamics means sales teams can always see the status of active RFP, RFI, and Questionnaire projects. On-demand visibility into project progress means sales teams spend more time selling, and proposal teams spend less time giving one-off status updates.

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Connect your CRM to your response process

DATASHEET



Capture & qualify RFX opportunities in Dynamics CRM

“Intake” creates a staging area for RFX opportunities, where any Dynamics users you choose can submit a formal request to proposal teams to conduct a bid-no-bid analysis. Intake requests submitted in Dynamics CRM go directly to a queue in RFPIO, where proposal teams have all the information and documentation they need to evaluate opportunities before converting them to active projects.



Get control over your projects, workflow, and content

Enterprise-ready administrative features give you full control over new RFPIO project creation, who can submit intake requests, and who can approve/modify content. No matter how you divide business units, manage users, or process approvals, RFPIO's Dynamics CRM integration provides the robust capabilities needed to adhere to your workflow and security preferences.



Make smarter decisions and gain insight into your process

Customizable reports and out-of-the-box managerial dashboards provide actionable insights into proposal operations like never before. Quickly identify roadblocks in critical projects, gain holistic insight into the proposal team's performance, and better understand how resources are being allocated. Bring RFPIO values into Dynamics CRM to enable granular reporting for forecasting or proposal operations in the same way you report on revenue/sales operations today.