



# ProFileCRM

## Document Management For MS Dynamics™ CRM 4.0

Microsoft Dynamics CRM is helping organisations to improve their business by bringing together the information they need to successfully manage sales, marketing and customer service operations.

Now you can take this one step further by incorporating **ProFileCRM** for instant access to all of the documents relevant to every relationship.

ProFile Document Management is proven software that enables organisations to securely store and manage any and every document that is important to their business. Now it's been integrated into Dynamics CRM enabling users to implement sophisticated document management **straight out of the box!**

ProFile will help you to:

- Store ANY document securely and with the same entity relationship structure that exists within CRM (Regarding and Related Regarding);
- Instantly view any relevant document;
- Search throughout your CRM system for all related documents in a single view;
- Build your own search criteria to automate common searches;
- Filter and sort documents so you get straight to the information you need;
- Store MSOffice documents directly from WORD, EXCEL, etc;
- Store images of paper documents and faxes;
- Limit user access to only those documents each individual should see;
- Encrypt all stored documents to make them tamper-proof;
- Automatically manage your document life-cycle rules;
- Manage document version control (Check In/Out);
- Comply with today's ever increasing regulation and information security requirements.

So for the full picture on every relationship, get the last piece of the jigsaw - **ProFileCRM**.