



Adding document context to your CRM

Vycunia is a ready-to-use solution that integrates all kinds of documents with your Microsoft Dynamics CRM. Office documents, emails and their attachments, even scanned documents and photos you've just made with your tablet or smartphone. **It is clever and intuitive**, so in no time you can assign additional information and context to a related CRM entity.

Vycunia works with any entity type in your CRM system, from accounts and contacts to opportunities, cases and projects, or perhaps a business entity like an insurance claim, that you've created yourself. **It's easy**. You just have to assign documents to the entity you're working on. And if you would prefer to assign documents later? No problem! They will patiently wait in a queue until you've got a spare moment.

Afterwards, when you call up this entity, every single document or file related to it will appear right there in front of you, neatly classified and organized by content type. Vycunia makes sure documents are properly integrated with your customer data and presented in a simple, attractive and user-friendly way.

Vycunia is 100% browser-based and directly integrates with the user experience of Microsoft Dynamics CRM by simply clicking the Vycunia menu items. It works anywhere you have a connection to the internet, no matter where in the world you may be.



Vycunia is unique. No other software on the market has been built with the intention of collecting and assigning your documents to specific CRM entities. Vycunia is designed to deliver efficiency and convenience in an incredibly user-friendly package.

Vycunia integrates seamlessly with Microsoft Dynamics CRM and SharePoint. It is being offered as cloudbased Software as a Service, or alternatively, you can choose to install it on premises in your own data centre.

Make sure you contact us directly or through one of our partners to find out how Vycunia can benefit you.

Document preview

Add metadata

Waiting queue

Imported documents

SELECT CASE

TYPE	FINAL
Commercial	click here to start a new composed document.
Photo	
Contract	
Registration	
Communication	
Registration	

Vycunia features

Import documents from almost any source

With the browser-based Vycunia interface, you can directly add documents from virtually any source to your CRM entity. Vycunia supports:

- Documents obtained from all types of scanners: multifunctional, wireless, or USB-connected.
- Emails and/or email attachments from Outlook.
- Pictures taken with mobile devices like iPads and smartphones.
- All other document types, including Adobe PDF and all Microsoft Office document formats.

Compose and assign documents to customer data

- Using the Vycunia Compose & Assign panel, scanned pages or images can be bundled into logical collections, tagged with the correct document type and assigned to CRM entities. For example you can compose a collection of scans into a contract and add it to a customer.
- Just drag and drop documents from the queue to assign them to CRM entities.
- To minimise the workload, metadata is automatically added based on the Dynamics CRM business context you are working on.

One integrated view on CRM with all related documents

- The ergonomic Vycunia document window offers an integrated view on all entity related documents.
- Vycunia stores documents in Microsoft SharePoint and as such supports versioning, co-authoring and web based viewing of documents.
- The integrated Search option makes it easy to find documents from within the CRM environment.
- CRM can check whether all necessary documents are present.

Advantages

- An intuitive, user-friendly interface.
- Seamless integration with Microsoft Dynamics CRM screens.
- A simple way to keep all your information, including documents, in one place with easy access.
- Vycunia is being offered as a SaaS solution with services that integrate natively with online versions of Microsoft Dynamics CRM and SharePoint. Or Vycunia can be installed on premises where it integrates well with on-prem or hybrid Microsoft CRM and SharePoint installations.

Go to www.vycunia.com for more details.

Email info@vycunia.com if you're interested in becoming a partner

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