

Visual Scheduling Project

For Microsoft Dynamics CRM



Visual CRM Scheduling technology for Microsoft Dynamics CRM provides sophisticated project, job, Activity scheduling of your customer demand and powerful, flexible scheduling of your resources to capacity intuitively with Dynamics CRM Activities.



End-to-end control starts with the Templates that define your business processes or common traits of unique projects. Assign complex service tasks to a Product.

Process/Project pre-sales analysis and knowledge-rich order management delivers an instant increase in productivity. Analyze cost, revenue, and schedule pre-sale.

Project/Job/Activity – Full Company resource allocation scheduled to real-time visual plan drives growth performance. Grow the business faster with better control.

Multi-Organizational control of departments, facilities, divisions tailored to users improves management efficiency.

Save-back completed work to templates for Continuous Business Improvement loop of cost, revenue, on-time.

Definition of customer requirements mapped out to resource requirement real-time allows Opportunity through Order to expose live project cost, revenue, schedule, and demand impact for evaluation manipulated visually . . .

Visual Project/Process Architectural Overview



Eloquently adaptable to your current use of Dynamics CRM Visual scheduling technology is available both flexibly and affordably while leveraging Dynamics CRM for scalability, security, and User familiarity. Multi-location, CRM Organizational business visibility of different business models across an enterprise of processes and projects visible full-screen are a dynamic improvement in management capability. This brochure highlights packaging options of Visual CRM technology as well as MTC's rapid-response low-cost support and customization services for any project's quick ROI.

Visual CRM technology is the new paradigm in business UI...

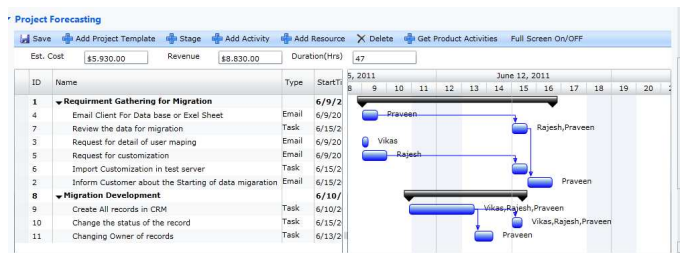


What the Visual Solution Adds to CRM . . .

Visual Benefits: Core Solution

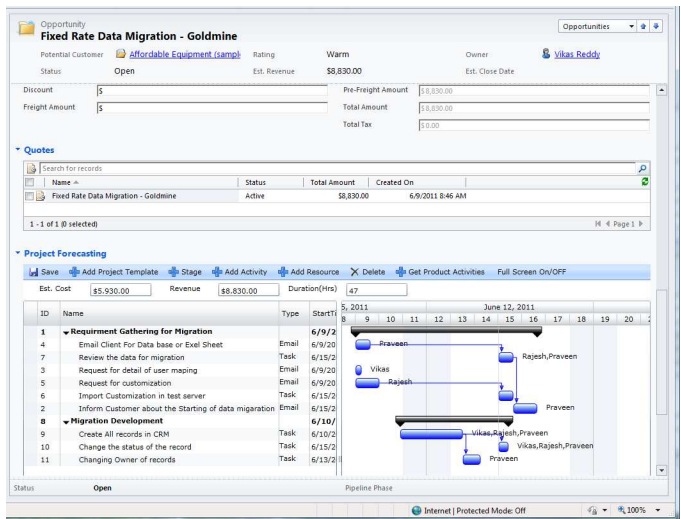
- ✓ Flexible scheduling models allow business-automation flexibility to a wide variety of industries and scale in enterprise volume.
- ✓ Intuitiveness of configuration in Microsoft CRM/Outlook allow tedious project tracking postings to be done easily and accurately.
- ✓ Scheduling drag and drop controls are more efficient in planning, tracking and managing resources to achieve higher staff productivity.
- ✓ Creating new projects as a “Template” or saving completed projects back to the Template for future use saves time and creates continuous improvement cycles.
- ✓ Flexibility to add or modify stages and CRM Activities from within the Visual Scheduler and Resource Scheduler saves management staff reaction time.
- ✓ Scheduling projects in “Stages” allows you to group the Activities for greater flexibility to billing milestones, functional blocks, scheduling restrictions, etc.
- ✓ Resource allocation “Leveling” and drag-and-drop controls allow flexible resource load editing
- ✓ “Resource Control” functionality sets project wide resource allocations and restricts posting errors.
- ✓ Multi-Organizational project scheduling allows overview of from the smallest groups to the largest projects where allocations are coming from multiple offices and venders.
- ✓ Resource Scheduling renders the availability of resources required to successfully deliver projects on time and efficiently schedule staff resources throughout the project lifecycle for better productivity.
- ✓ Complete tool set Contractors who farm out work.

Templates that define your business processes or common traits of unique projects – 3 stored template layers build on CRM Activity, interim Stage or milestone, and complete Project. Each is embedded with cost, revenue, skill, competency, duration, and performance categorization and can be built on-the-fly and as completed saved back to the template for continual improvement. Templates can be attached to CRM Products to define a Services used in order management.



Process/Project pre-sales analysis and knowledge-rich order management

Definition of customer requirements mapped out to resource requirement real-time allows Opportunity through Order to expose live project cost, revenue, schedule, and demand impact for evaluation manipulated visually . . .



Visually-rich information management
State-of-the-art intuitive user interface
Process performance excellence!



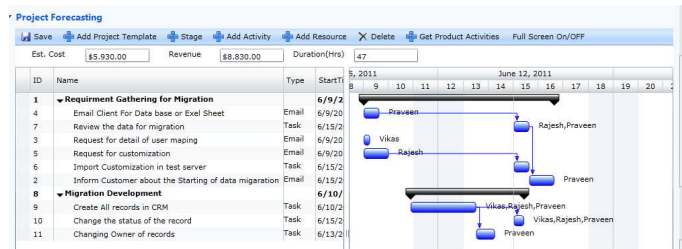
What the Visual Solution Adds to CRM . . .

User Benefits: Core Solution

- ✓ **Project Scheduling staff** and Project Managers will find the seamless and intuitive integration to CRM and Office Outlook a tremendous productivity enhancer for task communication to resources.
- ✓ **Resource Scheduler's** appreciate improved visibility and ease of resource allocation with the sophisticated automatic resource scheduling tools or optional day loading scheduler.
- ✓ **Project Managers** appreciate the ability to allocate and manage all resources internal, external, and grouped resources in complex projects all from the intuitive visual project overview with real-time reporting visually displayed and useful in on-the-fly project adjustments.
- ✓ **Consultants** will have more flexibility with the past, present, and near future Activities "To-do" real-time display within their Microsoft Office Outlook calendar for office, home, or on-the-go mobile viewing.
- ✓ **Sales Staff** benefit by the ability to utilize well managed past project performance in the form of Templates easily modified in new Opportunities where previous time and cost actuals become easy accurate Quote and forecasting tools.
- ✓ **External Resources** will perform better because of the more articulate instructions delivered per Activity as built through multiple iterations of the Activity within similar past projects.
- ✓ **Sales Managers** absolutely thrive on the improved quote performance of delivered with prospective project schedules presented accurately and visually intuitive in proposals or web portal presentation.
- ✓ **C-Level Manages** will appreciate the enterprise-wide activity view-at-a-glance ease of management and clear advance isolation for issues of concern.
- ✓ **Board Members** will delight in the capability to oversee entire operational areas of the business and being able drill down to areas of interest in all aspects of the business from clients, venders, staff, projects, and Activities.

Activity/Job/Project/Company resource allocation scheduled to a Visual plan

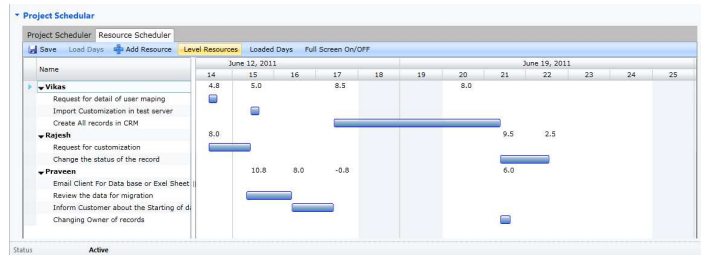
Rich planning data released, controlled, and distributed in a clear visual presentation tailored to both sides of the equation including customer expectation and real-time resource allocation against an optimally scheduled and loaded fulfillment plan gets



the job done with perfect execution. Management Visibility to cost, revenue, skill, competency, duration, and performance categorization optimized on-the-fly is the new UI paradigm in Customer Relationship Management.

Multi-Organizational control of departments, facilities, divisions

Rich Visual data full-screen CRM Views for live access to any piece of the business or the entire enterprise for customer demand against your resource allocations managed on-the-fly.



Visibility and control in your business free up time to focus on growth knowing that your process tools are in place to scale your business growth without increased costs.

Continuous Business Improvement

On-going customer demand fulfillment fed back to the Templates that define the businesses processes are proven component of best-practice management for services business.

Visual real-time decision support
Detail business analysis at any scale
Continues drive for excellence!

Partner NFR program, OEM, and custom development available from MTC to support unique needs



What are the Visual Solution Options . . .

Solution Extension Benefits

- ✓ **Live Status** is actual resource CRM Activities in process real-time graphically displayed atop customer demand for Visual clarity to anomalies faster than ever.
- ✓ **Live Status** Color Coding of all standard CRM Activities exposes a view of all company activity. Understand and Visualize complete required-staff processes to better understand and control process times and expose better productivity habits.
- ✓ **Live Status** Resource Scheduling Visual rendering of real-time resources required to successfully deliver projects on time makes Easy efficient scheduling of staff resources throughout the project lifecycle.
- ✓ **Live Status** Color Coding of all custom Alerts and custom workflows exposes a view of all company activity. Understand and Visualize complete required-staff processes to better understand and control process times and expose better productivity habits.
- ✓ Creating new projects as a “Template” or saving completed projects back to the Template for future use saves time and creates continuous improvement cycles.
- ✓ **Live Status** Flexibility to add or modify stages and CRM Activities from within the Project Scheduler and Resource Scheduler saves management staff reaction time.
- ✓ **Live Status** Scheduling projects in “Stages” allows you to group the Activities for greater flexibility to billing milestones, functional blocks, scheduling restrictions, etc.
- ✓ **Live Status** Resource allocation controls allow flexible resources loading editing while minimizing posting error potential.
- ✓ **Live Status** Multi-Organizational project scheduling allows overview of even the largest projects where allocations are coming from multiple offices and vendors.
- ✓ **Live Status** Resource Scheduling renders the availability of resources required to successfully deliver projects on time and efficiently schedule staff resources throughout the project lifecycle



Visual Live Status Series OPTION
For Microsoft Dynamics CRM

Real-time Visual company Status Views with exception alerts – State-of-the-Art!

This option adds significant business Visibility by interfacing to Activity records and time post functionality and enhancing the ability to highlight actual live status and anomalies in a vibrant color display. Ideal for large picture full-screen display is



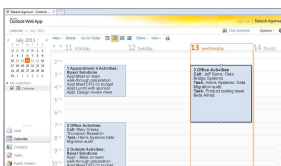
used for operational control. Great for real-time project force management. An organization is more easily managed visually to drag-and-drop on-the-fly. Work with MTC to build alert Visibility to anomalies happening in your business real-time.



Visual Exchange Sync Series OPTION
For Microsoft Dynamics CRM

Distribute “To-Do” to resources on Exchange Server / Active Link – OWA, Phones

This option allows organizations that are delivering resource “To-Do” information across the enterprise on Microsoft Exchange Server or ActiveLink to continue that same process – Outlook, OAW, PDA’s, phones, and most devices. Visual UI enhancement and data-enrichment synced controlled and released on-the-fly from CRM.




Visual Web Portal Series OPTION
For Microsoft Dynamics CRM

Give Customers more Visibility online

This option extends Visual Scheduling presentation of



project plan and job status to your Customers or Partners from CRM to your existing website. This option requires MTC’s “CRM Web Portal” solution and appropriate Visual Project Scheduling options. Partner Portal option allows Partner/end-user hierarchical views and control for both Partner and End-user using the Microsoft Live ID already being used.



OEM and custom development available from MTC to support unique needs

What are the Visual Solution Options . . .

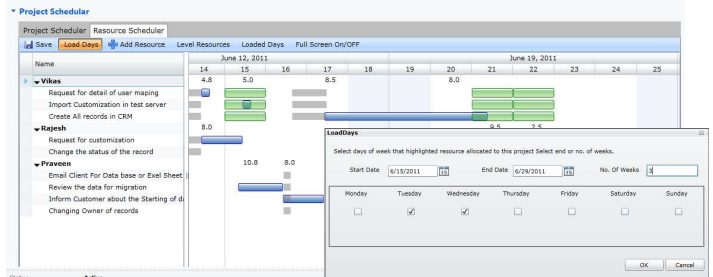
Solution Extension Benefits

- ✓ **Live Status** Color Coding of all standard CRM Activities allowing unique visual view of all company activity and tracking of activities helps to generate better understanding and control of process time to exhibit better productivity.
 - ✓ **Live Status** Flexible scheduling models allows business automation flexibility to a wide variety of industries along with ease and intuitiveness engineered into Microsoft CRM/Outlook allowing tedious project tracking postings to be done much more easily, regularly, and accurately.
 - ✓ **Live Status** Scheduling drag and drop controls allow efficiently managing resources and tracking activities to achieve higher employee productivity
 - ✓ **Live Status** Creating new projects as a "Template" or saving completed projects back to the Template for future use saves time and creates continuous improvement cycles.
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Resource Activity day loading layer

Visual Scheduling and even resource leveling where process Activates per project plus a large demand of customer demand requires consolidating activities for specific resource Day Loading. This Day Loading Layer, with leveling, fits and displays day-long appointments atop the schedule-driven actual customer

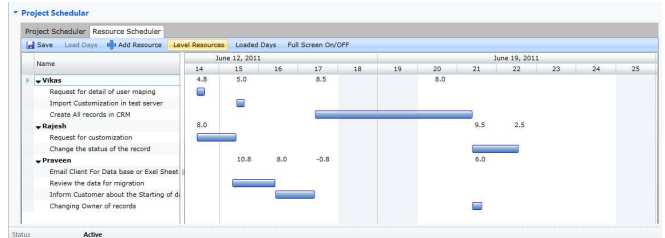


demand visually. Resources (Users) see all "Live" CRM project Activities past due, due now to a selectable forward horizon.



Real-Time sales & capacity forecasting

The new process for "Opportunity Management" is Editable grid based demand-side sales management and revenue forecasting - **Plus** the Visual template-product driven resource capacity-side forecast Layer is State-of-the-Art in Capacity management.



Starter Kit: See Your Company's Activities enterprise-wide to get control now!



delegate the View to be managed. The idea of seeing the data is to watch what you need to watch while building enterprise solution discipline new to an growing organization.

This is a great way to see your business from the heart pounding real-time. This entry-level Microsoft CRM Managed Solution Visual "Activity" display instantly shows all of your business's CRM Activities happening in in real-time. Isolate CRM views by Organization and



What is the Visual Solution Value . . .

Visual Project Scheduling and its expanding functional options are products integrated to a family of enterprise Microsoft CRM solution building blocks under the “SMB Custom Enterprise” (SMB) banner. SMB Custom is just that – All the building blocks to configure a complete enterprise solution fit to your business, scalable for growth. The entire solution family can be seen in the “ConsultPro”

SMB Custom Enterprise
Componentized Solutions on Dynamics xRM

My Custom xRM SERVICE

professional services practice management solution. The SMB and ConsultPro are solutions of MTC. MTC is the leader in efficient global CRM engineering for low-cost, fixed-rate Online and 24/5 live product support. MTC can configure product components, customize product functionality. Have MTC add workflow and scripting automation for you. We provide data migration, and configuration services.

Visual Project Scheduling Pricing:

| Solution Name | Included Functionality | Premise Purchase *Per User | Online Monthly *Per User |
|--|---|-------------------------------|-----------------------------|
| Visual Project Core | All standard dynamics CRM functionality customized to the ConsultPro functionality | 150.00 | 10.00 |
| Visual Live Status | **Includes standard iframe minimal design and includes all the functionality typically exposed to clients including the enhance modules purchased. | 50.00 | 3.00 |
| Forecast Manager | **Includes standard iframe minimal design and includes all the functionality typically exposed to clients including the enhance modules purchased. | 20.00 | 1.50 |
| Visual Web Portal | **Includes standard iframe minimal design and includes all the functionality typically exposed to clients including the enhance modules purchased. | 35.00 | 2.00 |
| Visual Exchange Sync | **Includes standard iframe minimal design and includes all the functionality typically exposed to clients including the enhance modules purchased. | 15.00 | 1.00 |
| Visual Day Loading | **Includes standard iframe minimal design and includes all the functionality typically exposed to clients including the enhance modules purchased. | 15.00 | 1.00 |
| Complete Solution | Includes all of the above per user functionality plus the flat options customer web portal, partner web portal, and QuickBooks integration. Phones NOT included. | 200.00 | 15.00 |
| Visual Activity Starter Kit to Core Upgrade Credit | <i>This is simply an activation upgrade to the capabilities of Visual Core plus Live Visual Status Option.</i> | Flat Credit 400.00 | Monthly/User Credit 2.00 |
| Visual Activity Starter Kit | **Includes standard iframe minimal design and includes all the functionality typically exposed to business partners subcontractors including the enhance modules purchased. | Flat Fee 750.00 | Flat Monthly 20.00 |

*All prices are in US Dollars. Prices are per user unless otherwise specified and are matched by the solution to the number of Microsoft Dynamics CRM users. Web Portals require the additional one-time purchase of the Microsoft Dynamics CRM External Connector License.

Volume discounts are available at the time of initial purchase only and in accordance to the following schedule:

50 to 99 users provides a 5% per user price discount

250 to 499 users provides a 20% per user price discount

1000 + users provides a 40% per user price discount

100 to 249 users provides a 10% per user price discount

500 to 999 users provides a 30% per user price discount

Volume discounting does not apply to “Flat” pricing items.

Maintenance and Support: 12 Months unlimited technical support and ongoing upgrades and solution enhancements are included with initial purchase. Annual maintenance and support thereafter is 15%. Upgrade from Dynamics CRM 4.0 to CRM 2011 is covered only for software delivery. Any required installation, configuration, or training in conjunction with a version upgrade is not included in maintenance and the support agreement.

Licensed issued by Organization to match number of CRM Users. 1st year maintenance is always included. Free email-based or \$50.00 Live Web Installation and Use Support or just about any customization

Available at www.DynamicsExchange.com/VPS.aspx www.MTCCRM.com/VPS.htm