

Workbooks extends its integration with Microsoft Office 365 by launching Outlook Add-In

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Workbooks (<http://www.workbooks.com>), a British cloud-based Customer Relationship Management (CRM) and marketing automation vendor, today announces a new Outlook Add-in, which enables people to directly manage CRM inside Microsoft Outlook.

Workbooks already gives users the ability to synchronise emails, meetings, contacts and tasks between the Microsoft Exchange and Workbooks CRM through the Workbooks Exchange Server Sync (WESS). Following user feedback, WESS has now been extended to include additional functionality via an Outlook Add-In for WESS.

The Add-in provides a user interface directly inside Outlook that allows users to create, view and edit records in Workbooks CRM, including people, organisations, activities, cases and opportunities.

The Outlook Add-In for WESS is deployed via the Office365 or Exchange server. It is designed to make it easier for users to interact with and derive benefit from CRM, by more closely integrating Outlook with Workbooks.

“The Outlook Add-In for WESS will enable teams to work seamlessly across Outlook and Workbooks, saving time every day. It automatically surfaces the information on people stored in CRM directly inside Outlook, without users having to search in CRM,” explains John Cheney, CEO Workbooks. “This provides users with better insight into their clients and prospects as they are responding to emails. For example, if you receive an email from someone you don’t know, you can quickly see if they exist in CRM, if they have cases or opportunities – and so without having to go into the CRM platform. You get all the essential insight you need to help inform how to respond to that particular customer or prospect.”

Other benefits include:

- 1) Less manual data entry. It is easy for users to create and update people, leads, cases, activities and opportunities records directly from Outlook. Contacts are synchronised back and forth between Outlook and Workbooks CRM. Outlook emails are automatically linked to associated CRM records including contacts and opportunities, cases, leads etc. Individual emails all roll up to the organisation so users can see all relevant engagement within an account in one place. Instead of copying and pasting data, Workbooks CRM enables new records to be created directly from emails. And if users want to do more and go into Workbooks CRM from Outlook, this can be done at a click of a button.
- 2) Stay on top of schedules. Calendars can be easily synchronised with Workbooks CRM. Workbooks activities can be viewed, created and edited in Outlook and vice-versa.
- 3) Leverage customisable synchronisation to suit users needs. Sync rules can be configured to suit the users / company’s requirements.
- 4) Deployed centrally. Outlook Add-In for WESS is an Exchange Add-In. This means it can be automatically deployed to all users centrally without having to visit each PC to install the software.
- 5) Flexibility. Outlook Add-In for WESS supports multiple Outlook clients, including Windows, MacOS and the Outlook Mobile Apps for Phones and Tablets.

The tight integration between Workbooks CRM and Outlook ensures that all teams can manage emails,

schedule appointments, updates contacts, organisations, opportunities cases etc., capture customer discussions and much more within a familiar interface, whilst all communication and interaction history is kept in one centralised place.

This add-in can be purchased for an additional £5 per user per month and is available immediately.

Workbooks is exhibiting at Technology for Marketing (<http://https://www.technologyformarketing.co.uk>), Olympia, London on 25th - 26th September 2019. Come and see the platform in action on Stand F30.

About Workbooks

Workbooks delivers cloud-based CRM and Marketing Automation applications to the mid-market, at an affordable price. Its services extend beyond sales, marketing and customer support to include order management and fulfilment, invoicing and supplier management, at a price which is typically 50-70% less than alternatives such as Salesforce or Microsoft Dynamics.

Workbooks unites the entire organisation around data and processes, promoting teamwork and collaboration. It provides a single 360-degree view of customers and the information is accessible anytime, anywhere. Productivity increases, operations streamlined, insightful decisions made and the business is better equipped to differentiate against the competition.

For more information, visit www.workbooks.com (<http://www.workbooks.com>)

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