ALL ABOUT
X-AUTHOR
FOR EXCEL

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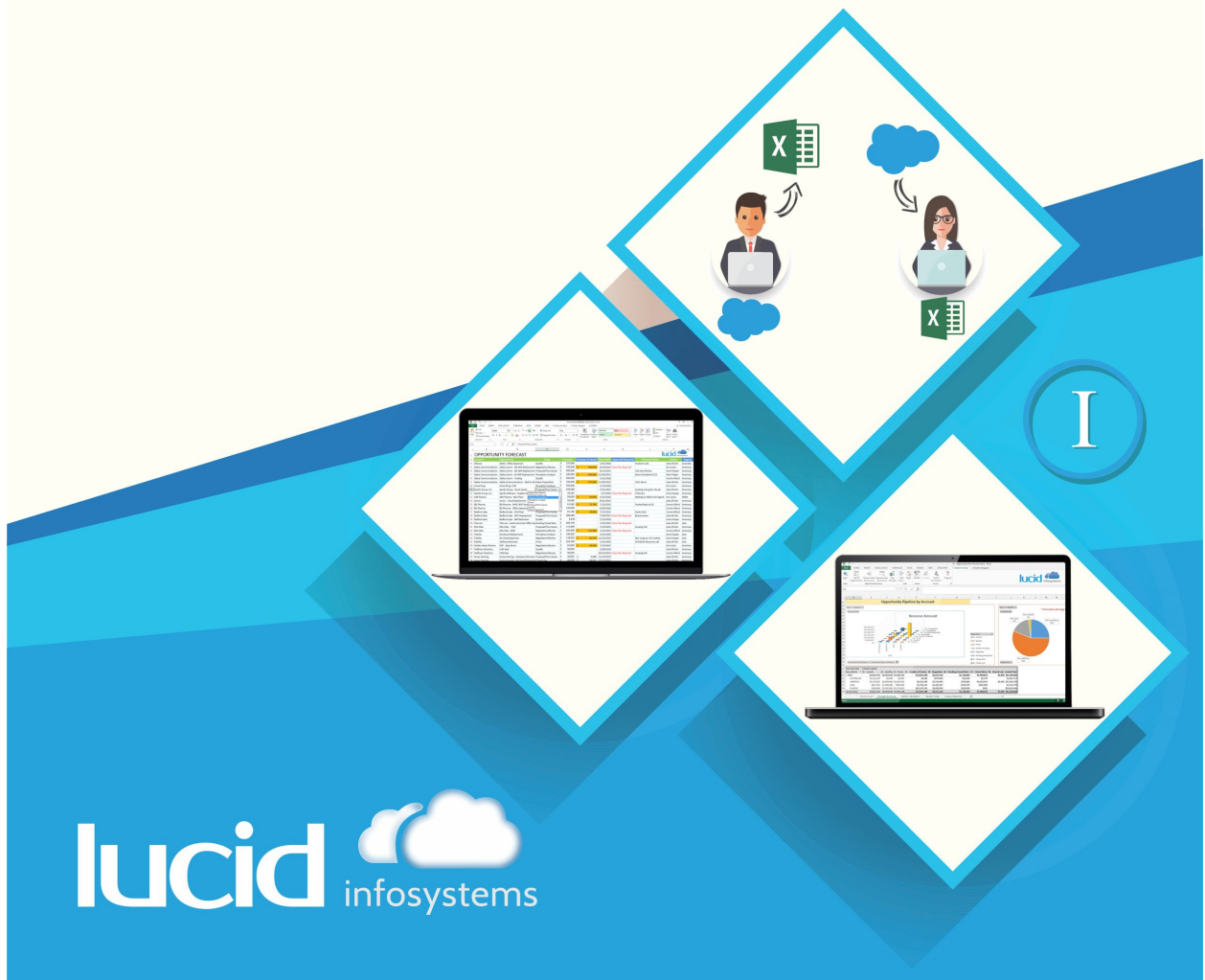
lucid infosystems

PREFACE

Lucid provides some of the most experienced professional and competent Salesforce and Apttus experts in the industry. We have sterling project references and experiences with many CRM and Apttus solution projects.

Below are some of our expertise:

- Over 20 years of experience in CRM & Cloud Technologies
- Over 20 years of experience in Enterprise Business Applications
- Many cloud based CRM application Implementations
- Questionnaire and script oriented low cost analysis and feedback
- Customizations and Integrations, project health checks and customer integration projects
- Product selection, superior project management and CRP method
- Managed Services
- Our clients tell us we are really good ☺

We-Lucid Team-decided share our hard-1 knowledge with the Apttus user community by writing the All About X-Author series. Stay tuned for our next books in the series.

This book gives you the starting point to use the Power of X-Author in a wide variety of business situations and industries for utilizing the power of the desktop and the power of the cloud, while dramatically increasing your adoption rate and likelihood of success.

Adoption is key to the transformation of any enterprise business process. So anything that dramatically improves adoption should be the top of your list for business transformations in this rapidly changing world.

In writing this book and considering all the ways that this product could be used, we grew to appreciate the transformative power of this product in the market.

We recommend that you try the examples in this book to quickly understand how to use the product and the great power that it brings to bridging the spreadsheet world to the shared visibility of the cloud.

We thank members of Lucid Infosystems who reviewed this book and contributed to its readability and understandability. We would also like to thank Apttus for giving us this chance to write about this great product and its transformative capabilities. Some of the images in this book are copyrighted material of Apttus and Microsoft and remain the copyright owners of these images and only used here for educational purposes.

If you support X-Author applications, then you know how handy it can be to have quick guide your arsenal to answer questions about X-Author.

Introduction to X-Author for Excel for Salesforce CRM

Organizations today suffer from many standalone applications that reside outside their enterprise systems and often consist of complex modules themselves. In this environment, data remains unsecured, and is vulnerable to out of control connections and loss of confidential information. Additionally, there are hassles involving manual data entry and its de-duplication.

Salesforce has a different user experience that requires some expertise to navigate and the user must be online to use. Its usage and adoption can be very time-consuming and hence significantly slows the adoption of the CRM. It also requires manual retyping and/or migrating data, which is also equally time-consuming.

The modern organization hence needs an intuitive and familiar tool for connecting end-users to a single cloud platform as well as storing the application in the cloud for version control.

X-Author bridges the user experience gap between Microsoft Excel application and Salesforce.com.

- With X-Author for Excel, Microsoft Excel provides a powerful user interface for Salesforce
- Users can now work in familiar, fast, and flexible environment that they prefer, without having to sacrifice data visibility, aggregation, security, and governance, since data is centrally managed in Salesforce
- By using Microsoft Excel to the view and update Salesforce data, all departments of the organization including sales, marketing, and service, are now more keen to embrace Salesforce for their daily use. Roll up nightmare across multiple spreadsheets can be avoided, providing more accurate information in a more-timely fashion.

We are providing an e-book on X-Author to help you get any more out of X-Author and build your own X-Author Apps for your organization and experience the quick adoption and see the great results even faster. Purchase the full version of this e-book from Amazon.

Please feel free to contact us with your specific questions or schedule an appointment for further discussions about your specific situation and our countless case studies.   Schedule an appointment to learn more.

Lucid Infosystems delivers professional end-to-end solutions and personalized services with our suite of tailored applications. We help you solve your critical and complex Salesforce & Apttus QTC implementations

Our End to End Services

Salesforce APTTUS Solutions

E2E Implementations Business Process Re-Engineering Product Selection

Portfolio | Program | Product Management

Apps Development Integrations

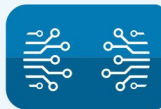**Quality Assurance Assessments**

Change Management Training & Comms

SWAT Team Support Services

Domain Specific Solutions

Hi-Tech

Non-Profit

Education

Bio-Tech

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