



**InterAction®**  
advancing what's possible

# InterAction® for Office 365®

## Maximise the Value of CRM Data and Alleviate End-User Adoption Challenges

In legal and professional services, firms rely heavily on their carefully curated networks to drive growth. Further, high-quality client and relationship data can improve firm-wide collaboration and the client experience. As vital as this information is, getting practitioners to update and reference this data can be a challenge.

InterAction® for Office 365® has taken an embedded and intelligent approach to CRM data, allowing professionals to capture, update, and reference the information where they already work—Microsoft Office. Whether you are in Outlook, Excel, or Word, InterAction becomes part of the natural workflow, essentially eliminating end-user adoption challenges.

You will no longer have to switch between windows, shrink windows, or interrupt your work to access customer insights or update contact record details. The data is embedded exactly where you need it!

## Data Control and Choice with InterAction for Office 365

InterAction for Office 365 is delivered through a hybrid cloud model that is built on patented technology that allows a cloud-based application to securely access data (but not store it at rest), regardless of where it resides—on-premises behind a firewall or in a private or public cloud. This gives you the power to control where you store your data while gaining the benefits of a cloud-based application.

## About InterAction

LexisNexis® InterAction® is a leading client relationship management (CRM) solution purpose-built for legal and professional services that gives you a holistic view of customer interactions across the firm. With InterAction, your firm is empowered to analyse, manage, and strengthen relationships so you can win more opportunities more profitably. InterAction is based on the common-sense practice: the more you know about your clients and customers, the better you can tailor your responses and services to them, resulting in more business.

## InterAction for Office 365

InterAction for Office 365 is an advanced, high-performing application that embeds CRM data into existing workflows across Microsoft® Outlook, Excel, and Word. Available for both desktop and subscription versions of Office, this application harnesses the power of a firm's client relationship data, delivering it at the point of influence so professionals can update, access, and consume client relationship data within their natural workflow at their desk or on the go.

## InterAction® for Office 365® Key Functionality

Function	Featured with InterAction for Office 365
Embedded CRM data	<ul style="list-style-type: none"><li>• Simplified user interface developed with customer feedback showing contact data as well as Activities, Relationships, and Lists</li><li>• Available across Microsoft Outlook, Excel and Word</li></ul>
Simplified workflow	<ul style="list-style-type: none"><li>• Hyperlink to company information, email creation and VoIP phone calls</li><li>• One- and two-click operations for adding contacts, logging activities, and managing lists</li><li>• Options to automatically log emails and phone calls for a contact</li><li>• Display contact information directly from Excel spreadsheets, Word documents, and Outlook emails</li></ul>
Data where you need it	<ul style="list-style-type: none"><li>• Available for both desktop and subscription versions of Microsoft Office</li><li>• Functionality at the desk or on the go through mobile Outlook or browser</li></ul>
Hybrid Cloud delivery model	<ul style="list-style-type: none"><li>• Built from a LexisNexis® patented technology</li><li>• Control sensitive assets like contacts and relationships: Your data is never stored in the cloud unless you choose to place it there</li><li>• Increased flexibility to store your InterAction data where you prefer and the option to move it in the future</li><li>• Easier application maintenance</li></ul>

## InterAction Seamlessly Integrates into Your Microsoft Office Suite

### Microsoft® Outlook

Search and validate contact information; add new contact in two clicks; alerts for employment and job title changes; use embedded pane for daily tasks such as add/view activities, review relationship information or add/remove from a list; set options to automate activity tracking.

### Microsoft® Excel

Map columns to show and count matches; use embedded pane for daily tasks such as add or view activities, review relationship information, or add/remove from a list.

### Microsoft® Word

Highlight text to search for contact in database; use embedded pane for daily tasks such as add/view activities, review relationship information, or add/remove from a list.

Go to our website for more information or contact one of our friendly representatives to schedule a demo.



**LEARN MORE**

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