Microsoft Dynamics CRM 3.0 overview

Increase Sales Support
Shorten the sales cycle and improve close rates with leads, opportunity management, automated sales processes, quote creation, and order management.

Deliver efficient, consistent customer service
A shared knowledge base and automated routing and queuing make it easy to serve customers efficiently.

Make informed, agile decisions
Comprehensive reports let you forecast sales, measure business activity and performance. Evaluate sales and service success, and identify trends, problems and opportunities.

Work from Outlook or the Web
Access full sales functionality online or offline through Microsoft Outlook, or work online from any location using a Web browser.

Share Information
Tightly integrated Sales and Customer Service functionality makes it easy to view, update, and share information across teams and departments.

Use easily
Designed for ease of use, Microsoft CRM ensures that sales teams get started fast.

Customize and Scale easily
Configure user interfaces and workflow processes, customize the solution to fit your business, and scale the installation to meet changing needs.

Integrate powerfully
Integrate with Microsoft Office, Microsoft Business Solutions for Financial Management, and other business systems.

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Maintain a detailed, complete view of each customer. Easily view and update account information and sales and service activity

Track the Data you need to close sales using customizable forms.

Easily add tabs. sections, and fields to any form.

Microsoft Dynamics CRM 3.0

Increase sales success, deliver superior customer service, and make informed, agile business decisions with Microsoft CRM. Accessible from Microsoft Outlook and the Web,

Microsoft CRM is easy to use, customize and maintain, integrates with other business systems, and scales to grow along with your business.

Microsoft GOLD CERTIFIED Partner

Microsoft Business Solutions

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The CRM System that grows alongside your business

Microsoft CRM 3.0 Overview

Features	Description

Sales

Features	Description
♦ Microsoft Outlook client	♦ Work online or offline through Mocrosoft Outlook, with synchronized access to full sales functionality.
♦ Complete customer view	♦ Veiw all contact and account information and history from a central location, including customer service records.
♦ Information Sharing	♦ Tighly integrated Sales an Customer Service modules make it easy to share information across departments.
♦ Lead and Opportunity management	♦ Automate leads routing and escalation, convert leads to opportunities, and track and manage opportunities through the sales cycle.
♦ Sales process management	♦ Automate stages in the selling process to track and close sales efficiently and consistently.
♦ Product catalog	♦ Create a full-featured product catalog that includes complex pricing levels, units of measure , discounts, and pricing options.
♦ Order Management	♦ Easily convert quotes to orders, and then modify and save orders until they are ready to be submitted and invoiced.
♦ Quotes	♦ Measure employee sales performance against individual goals.
♦ Reports	♦ Forecast sales, identify top opportunities and customers, and evaluate trends with robust reporting tools.
♦ Sales Literature	♦ Maintain a searchable library of sales literature that can be used online or offline.
♦ Territory Management	♦ Create sales territories and manage territory-based processes with workflow rules and reports.
♦ Competitor tracking	♦ Analyze competitor performance and maintain a library of articles on competitor activity.
♦ Correspondence and mail merge	♦ Create and send e-mail, using customized templates, to targeted prospects and customers groups. Create and send print communications using Microsoft Word Mail Merge.

Customer Service

Features	Description
♦ Case Management	♦ Create, assign, and easily manage cases for customer service requests. Manage actions and communications for each case from a central location.
♦ Complete view of accounts	♦ View all accounts, including sales and order information, to identify top customers and better understand specific customer needs.
♦ Automated routing and queuing	♦ Workflow rules let you automatically route service requests and cases to the appropriate representative or to queues for resolution, escalation, or reassignment.
♦ Searchable knowledge base	♦ Publish support articles and other relevant support information to a searchable knowledge base.
♦ Service Contracts	♦ Easily create and maintain service contracts within Microsoft CRM. When a support case is resolved, relevant contract information is updated automatically.
♦ Auto-response e-mail	♦ Generate auto-response e-mail to customer requests.
♦ E-Mail management	♦ Maintain an accurate record of customer-related communications, with automated tracking of customer e-mails that associate those mails with appropriate customer records.

Integration

Features	Description
♦ Sales and Customer Service Functionality	♦ Sales and Customer Service functionality integrates tightly, making it easy to share information across the business.
♦ Microsoft Outlook Client	♦ Salespeople can use Microsoft Outlook to work online and offline with access to full sales functionality.
♦ Microsoft Office	♦ Integration with Microsoft Office lets users create print communications using Microsoft Word Mail Merge, as well as export data to Microsoft Excel.
♦ Microsoft Business Solutions	♦ Microsoft CRM integrates easily with Microsoft Business Solutions for Financial Management. Key data mapping includes accounts, contacts, product catalog, orders, and price lists.
♦ Third Party applications and Web services	♦ Microsoft CRM functionality can be exposed through platform APIs for integration with third-party applications and Web services.

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