



## Microsoft Business Solutions Customer Relationship Management

Ensure consistency of data across teams and departments, streamline processes, and empower employees with a complete, accurate view of customer information. Built using Microsoft® .NET technologies, Microsoft CRM ensures low total cost of ownership and high return on investment through powerful, customizable integration functionality.

### View complete customer information

Integrated Sales and Customer Service functionality lets employees view, update and share information across teams and departments.

### Streamline processes

Free employees from time-consuming data entry and increase efficiency for sales and customer service processes.

### Integrate business systems

Connect customer information and streamline business processes across the organization: Microsoft CRM integrates easily with Microsoft Business Solutions Financials.

### Work from any location

Powerful Microsoft Outlook® integration lets salespeople work with sales functionality both online and offline.

### Create customized integrations

Working with flexible .NET technologies and powerful integration tools, developers can integrate Microsoft CRM functionality with third-party applications and Web services.

*Multiple pricing lists can be created in the Financials application and used when creating orders in Microsoft CRM.*

*Taxes, freight, and miscellaneous charges are calculated in the Financials application and then reflected in Microsoft CRM as part of the total cost for an order.*

Item Number	U of M	Quantity Ordered	Unit Price	Extended Price
TABLET PC-100K	Each	15	\$2,499.95	\$37,499.25
MEMORY-EXPANSION	Each	15	\$199.95	\$2,999.25
DOCKINGSTATION	Each	15	\$299.95	\$4,499.25
ACCESSORYPACK	Each	15	\$49.95	\$749.25
STORAGECASE	Each	15	\$99.95	\$1,499.25
POWERSUPPLY	Each	15	\$39.95	\$599.25

  

	Amount
Subtotal	\$47,845.50
Trade Discount	\$5,000.00
Freight	\$200.00
Miscellaneous	\$0.00
Tax	\$6,026.36
Total	\$49,071.86

*New orders created in Microsoft CRM can be fulfilled in the Financials application, increasing efficiency and accuracy.*

Microsoft CRM is built from the ground up on Microsoft .NET architecture, delivering tremendous business value through easy integration with third-party applications and Web services.

## Increasing productivity, reducing cost of ownership

### Microsoft Customer Relationship Management Integration

---

#### Sales and Customer Service Functionality

- Sales and Customer Service functionality are completely integrated, empowering employees to work collaboratively, and ensuring that customer information updates automatically across sales and service departments.
  - Salespeople can view customer service information that might affect sales processes for an opportunity or customer.
  - Customer service representatives can view complete account information, including sales and orders, to help them identify top customers and evaluate specific customer needs.
  - Sales and service employees can view, share, and update information with individuals and across team departments.
- 

#### Microsoft Outlook

- Salespeople can access Microsoft CRM from Microsoft Outlook, and work online or offline with access to sales functionality.
  - Microsoft CRM e-mail, contacts, appointments, and tasks are integrated with Outlook.
  - With offline access to sales functionality, salespeople can work on the road with up-to-date information for accounts, contacts, opportunities, leads, sales literature, competitors, quotes, products, and more.
  - If a salesperson makes changes to data while working offline in Outlook—for example, updating a quote for a customer—the new information will synchronize with the Microsoft CRM server the next time they go online.
- 

#### Other Microsoft Office Integration

- Integration with Microsoft Word Mail Merge lets users import Microsoft CRM data into Word and easily create and print communications to prospects, customers, employees, and partners.
  - Microsoft CRM data and reports can be exported to Microsoft Excel for sorting and analysis.
- 

#### Microsoft Business Solutions Financials

- Microsoft CRM integrates easily with Microsoft Business Solutions Financials.
  - Integration functionality includes key data mapping for accounts, contacts, product catalog, orders, and prices.
  - Customer information integrates bi-directionally, with account and contact information in Microsoft CRM mapping to customer fields in Microsoft Business Solutions applications.
- 

#### Third-Party Applications and Web Services

- The first business solution built from the ground up using Microsoft .NET technologies, Microsoft CRM can be integrated with business and financial systems regardless of platform or programming language.
  - Microsoft CRM ships with Microsoft BizTalk® Server 2002 Partner Edition, including tools and documentation for creating customized integrations with third-party applications and Web services.
  - Working with open application programming interfaces (APIs) and a comprehensive Software Developer Kit (SDK), developers can incorporate Microsoft CRM functionality into custom solutions developed in Microsoft Visual Studio® .NET.
- 

*Microsoft Customer Relationship Management is designed to meet budget and support needs for mid-market businesses. Delivery and implementation through certified Microsoft Business Solutions partners include hands-on assistance with setup and maintenance processes, along with comprehensive training and support resources.*