



Increase sales success

Shorten the sales cycle and improve close rates with leads and 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 Financials, and other business systems.

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.

Microsoft Business Solutions Customer Relationship Management

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.

The screenshot shows the Microsoft CRM interface. On the left is a navigation pane with folders like CRM, Accounts, Leads, and Opportunities. The main window displays 'Accounts' with a search bar and a list of accounts. Below this is a 'Microsoft Customer Relationship Management' window showing a list of activities for a specific date (5/20/2002). The activities are categorized into 'Past Due Activities', 'Activities Due Today', and 'Activities Due Tomorrow'. A 'Sales Training on New Products' announcement is visible at the bottom.

Callout boxes provide additional information:

- View and update critical information about activities and internal news.** (Points to the activities list)
- Access Microsoft CRM online or offline within Microsoft Outlook.** (Points to the Outlook interface)
- Manage tasks, activities, and communications from one location.** (Points to the activities list)
- Quickly access e-mail, calendar, Sales and Customer Service functionality, and reports.** (Points to the bottom navigation bar)

The CRM solution that grows alongside your business

Microsoft Customer Relationship Management

Features	Description
Sales	
• Microsoft Outlook client	✓ Work online or offline through Microsoft Outlook, with synchronized access to full sales functionality.
• Complete customer view	✓ View all contact and account information and history from a central location, including customer service records.
• Information sharing	✓ Tightly integrated Sales and Customer Service modules make it easy to share information across departments.
• Leads 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.
• Quotas	✓ 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 customer groups. Create and send print communications using Microsoft Word Mail Merge.
Customer Service	
• 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 associates those mails with appropriate customer records.
Integration	
• Sales and Customer Services 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 Financials. 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.

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.

For more information about Microsoft Customer Relationship Management, go to:

www.microsoft.com/crm