



## Microsoft Business Solutions Customer Relationship Management

Accessible from Microsoft Outlook® and the Web, Microsoft CRM Sales helps sales people manage leads and opportunities, measure and forecast sales activity, efficiently track customer communications, and automate stages in the sales process—helping ensure a shorter cycle, higher close rates, and improved customer retention.

### Increase sales success

Shorten the sales cycle and improve close rates with leads and opportunity management, customizable workflow rules for automated sales processes, quote creation, and order management.

### Understand customer needs

Comprehensive reports let you forecast sales, measure business activity and performance, track sales and service success, and identify trends, problems, and opportunities.

### View complete customer information

Microsoft CRM offers a centralized, customizable view of sales and support activity and customer history.

### Work from Microsoft Outlook or the Web

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

### Share information

View, update, and share sales and customer service information across teams and departments.

### Integrate powerfully

Integrate with Microsoft Office, Microsoft Business Solutions Financials, and other business systems.

Access Microsoft CRM quickly and easily through Microsoft Outlook. Manage all activities, e-mail, and sales-related information from within Outlook.

Maintain a complete, detailed view for every customer, including account information, sales and service activity, and product information.

The screenshot displays the Microsoft CRM interface. On the left, the Outlook interface is visible with a 'Folder List' pane showing 'Microsoft CRM' and various sub-folders like 'Accounts', 'Leads', and 'Opportunities'. The main Outlook window shows a list of accounts with columns for 'Account', 'Primary Contact', 'Telephone', and 'Billing City'. One account, 'A. Datum Corporation', is selected. To the right, a detailed view of this account is shown in a web browser window. This view includes a 'General' tab with fields for 'Account Name', 'Account Number', 'Main Phone', 'Other Phone', 'Parent Account', 'Primary Contact', 'Relationship Type', 'Address', 'Zip/Postal Code', 'Country', 'Phone', 'Address Type', 'City', 'State/Province', 'Web Site', 'Email', and 'Shipping Method'. The 'Status' is shown as 'Active'.

Work online or offline using Outlook, with easy access to full sales functionality.

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

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.

## Increase customer acquisition and retention

### Microsoft Customer Relationship Management Sales

• <b>Microsoft Outlook integration</b>	Work online or offline using Microsoft Outlook, with access to accounts, opportunities, products, quotes, orders, sales literature, and more. Microsoft CRM contacts, appointments, tasks and e-mail capabilities are integrated with Outlook.
• <b>Complete customer view</b>	View and manage customer account activity and history, including: contact information, communications, open quotes, pending orders, invoices, credit limits, and payment history.
• <b>Lead routing and management</b>	Track information on prospective customers, then qualify and assign inquiries. Leads can be automatically routed to the correct salespeople or teams.
• <b>Opportunity management</b>	Convert qualified leads easily to opportunities without data re-entry and then track opportunities throughout the sales cycle.
• <b>Sales process management</b>	Initiate, track, and close sales consistently and efficiently with workflow rules that automate stages in the selling process.
• <b>Product catalog</b>	Work with a full-featured product catalog that includes support for complex pricing levels, units of measure, discounts, and pricing options.
• <b>Order management: quotes, orders, and invoices</b>	Create and convert quotes to orders, then modify and save orders until they are ready to be submitted. If a financial application is integrated, invoices for orders are published automatically into Microsoft CRM from that system.
• <b>Quotas</b>	Use customizable quotas to measure employee sales performance against goals. As opportunities are closed in Microsoft CRM, they are credited against the assigned quota.
• <b>Territory management</b>	Create territories for salespeople, enabling them to manage and evaluate territory-based sales processes with workflow rules and reports.
• <b>Reports</b>	View, sort, and filter a wide range of reports to identify trends, measure and forecast sales activity, track sales processes, and evaluate business performance.
• <b>Sales literature</b>	Create, manage, and distribute a searchable library of sales and marketing materials, including brochures, white papers, and competitor information.
• <b>Competitor tracking</b>	Maintain detailed information on competitors in a library and associate that information with opportunities and sales literature. Reporting functionality tracks competitor activity by product, region, or other criteria.
• <b>Workflow</b>	Automate leads routing, notifications, and escalations. Workflow rules also make it easy to generate and send auto-response e-mail to customer requests.
• <b>Correspondence and mail merge</b>	Use customizable templates to create and send e-mail to targeted prospects and customers. Print communication materials can be created and sent using Microsoft Word Mail Merge.
• <b>Integration with Microsoft Business Solutions</b>	Microsoft CRM integrates easily with Microsoft Business Solutions Financials, including key data mapping for accounts, contacts, product catalog, orders, and price lists.

*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 includes 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](http://www.microsoft.com/crm)