

MICROSOFT BUSINESS SOLUTIONS CRM INTEGRATION

Maintain consistent, accurate data across teams and departments, streamline business processes, and empower employees with a complete view of customer information. Microsoft® Business Solutions CRM offers powerful, customizable integration functionality that helps ensure low total cost of ownership and rapid time to benefit.

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 help increase efficiency for sales and customer service processes.

INTEGRATE BUSINESS SYSTEMS

Connect customer information and business processes across the organization by integrating with Microsoft Business Solutions for Financial Management (North American versions only).

WORK FROM ANY LOCATION

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

CREATE CUSTOMIZED INTEGRATIONS

Working with Microsoft .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.

This screenshot shows the 'Order: Product Order' form in Microsoft CRM. The 'Totals' section is highlighted, showing the following values:

| | |
|-------------------------|----------|
| Detail Amount (\$) | 3,317.43 |
| Order Discount (%) | |
| Order Discount (\$) | |
| Pre-Freight Amount (\$) | 3,317.43 |
| Freight Amount (\$) | |
| Total Tax (\$) | 0.00 |
| Total Amount (\$) | 3,317.43 |

TAXES, FREIGHT, AND MISCELLANEOUS CHARGES are calculated in the financials application and then reflected in Microsoft CRM.

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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 the Microsoft .NET Framework, delivering tremendous business value through easy integration with third party applications and Web services.

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Sales and Customer Service

Sales and customer service capabilities are completely integrated, empowering employees to work collaboratively. Customer information is updated 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 teams and 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 Microsoft CRM 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 for Financial Management

Microsoft CRM integrates with Microsoft Financial Management (North American versions only).

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 Financial Management applications.

Third-Party Applications and Web Services

Built on the .NET Framework, Microsoft CRM can be integrated with business and financial systems regardless of platform or programming language.

Microsoft CRM ships with 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 functionality into custom solutions developed with Microsoft Visual Studio® .NET.

Microsoft CRM is available in U.S. English, International English, French, German, Spanish, Italian, Dutch, Brazilian Portuguese, and Danish.

Microsoft CRM works with the latest Microsoft operating systems and servers, including Microsoft Windows® Small Business Server 2003 Premium Edition.

A global network of Microsoft Partners can offer hands-on assistance with setup and maintenance processes for Microsoft CRM, along with comprehensive support and training resources.