



## MICROSOFT BUSINESS SOLUTIONS CRM SALES

**Microsoft Outlook integration:** Work online or offline with access to accounts, opportunities, products, quotes, orders, sales literature, and more. Microsoft CRM contacts, appointments, tasks and e-mail capabilities also are integrated with Outlook.

**Complete customer view:** View and manage customer account activity and history, including: contact information, communications, open quotes, pending orders, invoices, credit limits, and payment history.

**Lead routing and management:** Track information on prospective customers, then qualify and assign inquiries. Leads can be automatically routed to the correct salespeople or teams.

**Opportunity management:** Convert qualified leads easily to opportunities without data re-entry and then track opportunities throughout the sales cycle.

**Sales process management:** Initiate, track, and close sales consistently and efficiently with workflow rules that automate stages in the selling process.

**Product catalog:** Work with a full-featured product catalog that includes support for complex pricing levels, units of measure, discounts, and pricing options.

**Order management:** Create and convert quotes to orders, then modify and save orders until they are ready to be quotes, orders, and invoices submitted. If a financial application is integrated, invoices for orders are published automatically into Microsoft CRM from that system.

**Quotas:** Use quotas to measure employee sales performance against goals. As opportunities are closed in Microsoft CRM, they are credited against the assigned quota.

**Territory management:** Create territories for salespeople, enabling them to manage and evaluate territory-based sales processes with workflow rules and reports.

**Reports:** View, sort, and filter a wide range of reports to identify trends, measure and forecast sales activity, track sales processes, and evaluate business performance.

**Sales literature:** Create, manage, and distribute a searchable library of sales and marketing materials, including brochures, white papers, and competitor information.

**Competitor tracking:** 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.

**Workflow:** Automate leads routing, notifications, and escalations. Workflow rules also make it easy to generate and send auto-response e-mail to customer requests.

**Correspondence and mail merge:** 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.

**Integration with Microsoft Financial Management:** Microsoft CRM integrates easily with Microsoft Financial Management (North American versions only). Key data mapping includes accounts, contacts, product catalog, orders, and price lists.

**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.**