MICROSOFT BUSINESS SOLUTIONS **CRM OVERVIEW**

Help increase sales success, deliver superior customer service, and make informed, agile business decisions with Microsoft® Business Solutions 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.

ACCESS MICROSOFT CRM ONLINE OR OFFLINE within Microsoft Outlook.

VIEW AND UPDATE CRITICAL INFORMATION about activities and internal news.

MANAGE TASKS, ACTIVITIES, AND COMMUNICATIONS from one location.

QUICKLY ACCESS E-MAIL, CALENDAR, sales and customer service functionality, and reports.

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.

BUILD SALES SUCCESS
Shorten the sales cycle and help 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 capabilities make it easy to view, update, and share information across teams and departments.

USE EASILY
Get started fast with an intuitive user interface and easy navigation—Microsoft CRM is designed to minimize training time and costs.
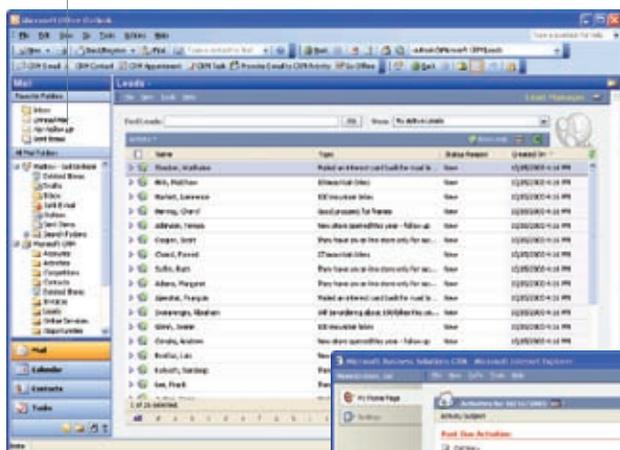
CUSTOMIZE AND SCALE EASILY
Modify the user interface and workflow processes, customize the solution to fit your business, and scale the installation to meet changing needs.
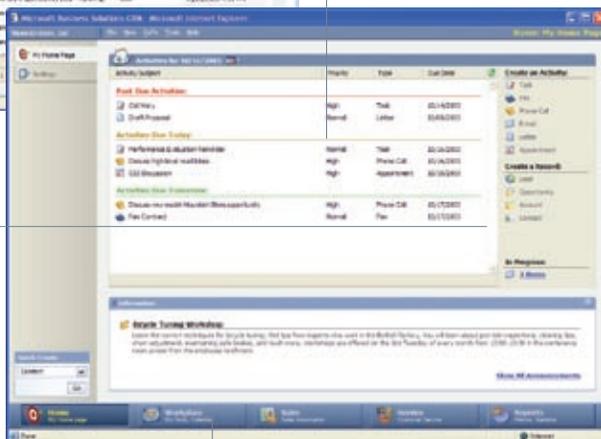
INTEGRATE WITH OTHER APPLICATIONS
Microsoft Business Solutions for Financial Management (North American versions only), and other business systems.

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 functionality 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: Customizable templates make it easy to create and send e-mail 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. 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. Automated tracking of e-mails that associates those mails with appropriate customer records.

Integration

Sales and Customer Service: Sales and customer service capabilities integrate tightly, making it easy to share information across the business.

Microsoft Outlook: 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 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.

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 Business Solutions CRM

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.

Microsoft
Business
Solutions