

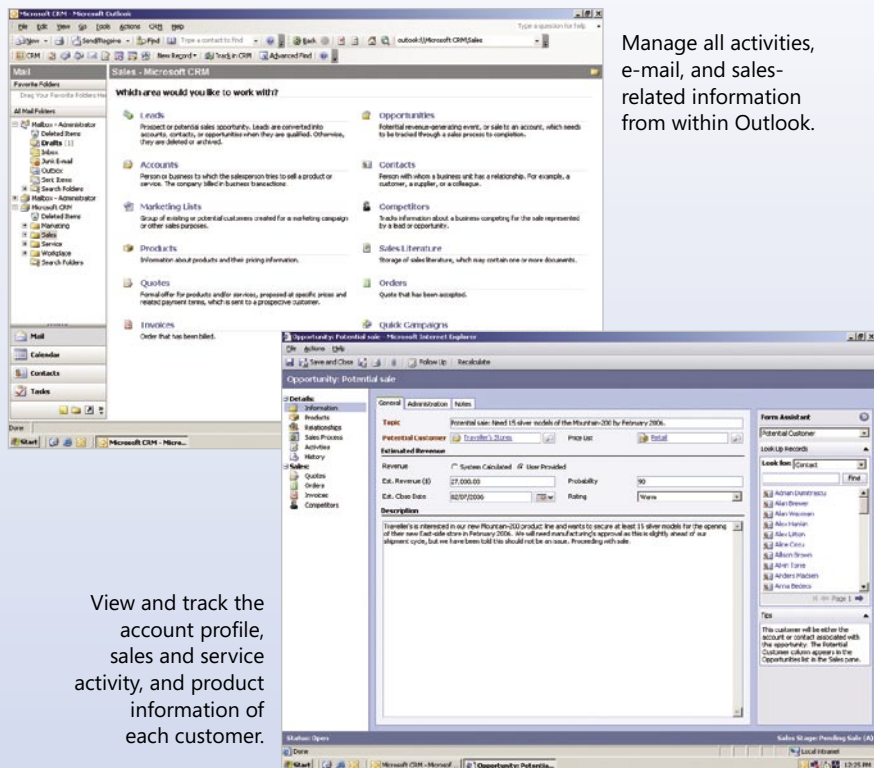
Microsoft Dynamics™ CRM 3.0

Sales Datasheet

Microsoft Dynamics™ CRM 3.0 Sales makes it easy to manage leads and opportunities, measure and forecast sales activity, track customer contacts, and automate the sales process — helping ensure a shorter sales cycle, higher close rates, and improved customer retention.

CRM That Works the Way You Do

Microsoft® CRM fosters user adoption and drives sales effectiveness with its familiar and intuitive native Microsoft Office Outlook® interface and full Web/mobile access.



The screenshot shows the Microsoft Dynamics CRM 3.0 interface within the Microsoft Office Outlook environment. The top pane displays a list of sales entities: Leads, Accounts, Marketing Lists, Products, Quotes, and Enquiries. The bottom pane shows a detailed view of an 'Opportunity: Potential sale' with fields for 'Potential Customer', 'Estimated Revenue', 'Revenue', 'Est. Revenue (\$)', 'Est. Close Date', 'Probability', and 'Rating'. A 'Form Assistant' pane on the right provides a 'Look Up Contacts' list.

Manage all activities, e-mail, and sales-related information from within Outlook.

View and track the account profile, sales and service activity, and product information of each customer.

MANAGE WORK MORE EASILY

Microsoft CRM delivers CRM functionality as a natural extension of Microsoft Office Outlook. Manage customer e-mail, appointments, tasks, and contacts from a single business application.

BUILD BETTER RELATIONSHIPS

Use a centralized, customizable view of your customer's preferences, relationships, and activity history to better understand and meet their needs.

IMPROVE SALES QUALIFICATION

Spend time with the right leads and prospects. Establish consistent follow-up processes and automate sales activities with powerful system workflow.

INCREASE SALES SUCCESS

Shorten the sales cycle and improve win rates with lead and opportunity management, automated lead routing, sales process management, and competitor tracking.

CULTIVATE NEW SALES

Use simple, wizard-driven sales and marketing tools to keep your sales prospects and customers informed of new product and service offerings.

ANALYZE SALES PERFORMANCE

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

WORK AWAY FROM THE OFFICE

Access full sales functionality online or offline through Microsoft Outlook, or work from any location using the Web client or Microsoft Windows Mobile®-based Pocket PC.

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About Microsoft CRM

Native Microsoft Outlook experience: Manage your sales, service and marketing relationships within a single business application. Automatically synchronize Outlook E-mail, Calendar, Tasks, and Contacts with your Microsoft CRM database.

Complete customer view: View and manage customer account activity and history, including contact information, detailed notes, document attachments, communications, open quotes, pending orders, invoices, and credit limits.

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: Easily convert qualified leads 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.

Sales and marketing list management: Import purchased sales and marketing lists to fuel your sales efforts. Measure list effectiveness and maintain marketing lists for annual sales campaigns.

Quick campaigns and sales campaigns: Use wizard-driven tools to keep your customers informed and aware of your new products and services.

Opportunity roles and relationships: Build and maintain sales relationships enabling your sales professionals to relate to decision makers, influencers, and financial stakeholders within sales opportunities.

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

Quote and order management: Create and convert quotes to orders, then track and manage orders throughout their life cycle. 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. Track 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.

Built on the scalable and security-enhanced Microsoft .NET platform and leveraging standard tools and technology, including Microsoft SQL Server®, Microsoft BizTalk Server, and Microsoft Visual Studio®, Microsoft CRM 3.0 allows you to take advantage of your existing IT investments and in-house expertise to help minimize your total cost of ownership. The product is available on the latest Microsoft operating systems and servers, including Microsoft Windows® Small Business Server 2003 Premium Edition.

Microsoft CRM is available in English, French, German, Spanish, Italian, Dutch, Brazilian Portuguese, Danish, Czech, Hungarian, Polish, Russian, Swedish, Portuguese, Turkish, Greek, Norwegian, Finnish, Chinese, and Japanese.

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.

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