



Microsoft Customer Relationship Management Sales

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—ensuring 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.

Complete customer view

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

Work from Outlook or the Web

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

Share information

Integrated modules let employees view, update, and share information across teams and departments.

Integrate powerfully

Integrate with Microsoft Office, Microsoft Business Solutions ERM applications, 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' for 'Microsoft CRM' containing folders like Accounts, Activities, Competitors, Deleted Items, Leads, Opportunities, Products, Orders, Reports, Sales Literature, Outlook Today, Calendar, Contacts, Deleted Items, Drafts, Inbox, Journal, Notes, Outlook, Sent Items, and Tasks. The main window shows a table of accounts with columns for Account, Primary Contact, Telephone, and Billing City. Below the table, a detailed view for 'A. Datum Corporation' is shown, including fields for Account Name, Account Number, Parent Account, Primary Contact, Relationship Type, Address (Street 1-3, City, State/Province), Zip/Postal Code, Country, Phone, Other Phone, Fax, Web Site, Email, Address Type, and Shipping Method. The status is '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

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Designed to help your sales team work without limits, Microsoft CRM Sales can be used online or offline with Microsoft Outlook, or from any location with a Web browser. A familiar, intuitive UI and simple work tools make it easy for users to get started fast, with little training.

Microsoft CRM-Sales Features List

- **Microsoft Outlook or Web access** ✓ Work online or offline through Microsoft Outlook with access to full sales functionality, including contacts, opportunities, accounts, product catalog, quotes and orders, sales literature, activities, e-mail, and more. Work from any location using a Web browser.
- **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.
- **Opportunity management** ✓ Easily convert leads to opportunities without data re-entry, and then track opportunities throughout the sales cycle. Use customizable workflow rules to automate leads routing, notifications and escalations, and opportunity and pipeline activity management.
- **Sales process management** ✓ Ensure sales opportunities are tracked and closed consistently and efficiently, with customizable workflow rules that automate stages in the selling process.
- **Information sharing** ✓ Share information about contacts, accounts, opportunities, orders, and more by granting share access on an ad hoc basis. Tightly integrated Sales and Customer Service modules let salespeople view accurate, updated information about customer support incidents, contracts, and other data relevant to customer needs and satisfaction.
- **Quotes** ✓ Create and modify accurate quotes for prospects and existing customers, using a full-featured product catalog that supports complex pricing levels, units of measure, and discounts.
- **Order management** ✓ Convert quotes to orders, and then modify and save orders until they are ready to be submitted.
- **Sales force management (quotas)** ✓ Measure employee sales performance against goals. As opportunities are closed in Microsoft CRM, they are credited against the assigned salesperson's quota.
- **Territory management** ✓ 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, competitor information, and more.
- **Competitor tracking** ✓ Maintain a library of detailed competitor information and associate that information with opportunities and sales literature. Run reports that track competitor activity by product, region, or other criteria.
- **Direct e-mail; print communications** ✓ Using customizable templates, create and send e-mail to targeted prospects and customer groups. Create and send print communications using Microsoft Word Mail Merge.
- **Integration with Microsoft Business Solutions** ✓ Microsoft CRM integrates easily with Microsoft Business Solutions ERM applications. Key data mapping includes accounts, contacts, product catalog, pricing lists, orders, and invoices.

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 the setup and maintenance process, as well as 24-hour access to Microsoft Technical Support Services.

For more information about Microsoft Customer Relationship Management, go to:

www.microsoft.com/crm