

## Microsoft® Navision Attain®

### CRM – Service

*Makes it profitable for you to deliver superior customer service.*

#### Key Benefits

- Increase your productivity by creating a highly-efficient work environment for your service employees and by gaining maximum efficiency from your service operations
- Sharpen your competitive edge by understanding your service operations better and by improving customer satisfaction



## Microsoft Navision Attain CRM – Service

### Great Service Made Profitable

When it comes to service, your customers have high expectations. Given the many service organizations out there, you know that you can't afford to disappoint them. Providing great service, however, can be costly. But what if extending the services you offer to meet increasing customer needs was profitable?

The CRM – Service application area in Microsoft Navision Attain helps you increase the productivity of your service operations and sharpen your competitive edge because you can:

- Place tighter controls on costs
- Organize your resources for maximum efficiency
- Profit from existing customers by providing better service levels.

### Control Costs

With CRM – Service, you maintain tighter controls on your inventory. Your operations are more cost-effective because you're always up-to-date and well-informed as to the current status of your inventory. And you're free to make more cost-effective decisions. For example, you can see if two differently priced spare parts in your inventory perform the same function and eliminate the more expensive one.

You are able to pinpoint out-of-date, defective, undependable and unnecessarily expensive spare parts and service items in your portfolio. More

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importantly, you can identify your most cost-effective spare parts and service items at a glance, as well as the hidden spare parts and service items that may be adding unnecessary costs to your operations.

### **Know What to Do and When**

If you want to be cost-effective, you have to plan ahead. With CRM – Service, you make good purchasing decisions because you know what orders need to be filled and when.

You can:

- See whether the spare parts and items you need are available when you need them.
- Gather your requisitions so you know what needs to be ordered and when for all your open service orders.

Your employees fulfill orders more efficiently because lengthy and often costly processes are automated.

And as your employees save time, you save money.

You gain immediate access to customer contracts and warranties, and service information. What's more, you spend less time tracking vital information and you can allocate zones, skills and service items to match the specific service order.

### **Organize Resources**

You become more efficient with an enhanced overview of your company's service resources and customer needs. You significantly improve the overall handling of your inventory, employees and response times.

You use CRM – Service as a planning tool for future resource allocation, and as a result make smarter business decisions faster.

### **Avoid the Surprise Factor**

You identify service requirements in advance, and your dispatchers and technicians have accurate and up-to-date information on future demand. This means you're better equipped to deal with customer needs.

What's more, you pinpoint problem areas. And, the faster you identify problems, the faster you resolve them. The overall efficiency of your organization increases because your employees have the tools they need to respond quickly to problems. More importantly, they have the power to prevent them from recurring.

### **Win Customer Loyalty**

With CRM – Service, you can profit from your existing customers because you respond to their needs effectively and consistently. You make each customer feel like a VIP because of the highly personalized service you offer. You satisfy customers and ensure their loyalty because you improve service levels, response times, and reliability.

### **Create Personal Customer Profiles**

You create a personal profile for every customer, so you're always up-to-date on the changing needs of each customer. For example, you offer your customers billing flexibility, personalized pricing and

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the opportunity to specify preferred technicians and service times.

### **Meet and Exceed Expectations**

CRM – Service helps you take customer satisfaction one step further and exceed customers' expectations.

You can:

- Quickly and easily access customer service history.
- Anticipate customer needs.
- Maintain real-time records, such as the date, time and Service Tasks.

Your employees have the tools they need to respond to customer needs effectively and consistently. And your customers are saved the frustration of having to repeat the same information over and over again. The reward? Loyal, satisfied customers.

### **Ask Your Partner**

To learn more about Microsoft Navision Attain, contact your local Navision Solution Center. They have the expertise to design a solution that fits your specific business needs. Or, visit our Web site at:

<http://www.microsoft.com/BusinessSolutions>

### **About Microsoft Business Solutions**

Microsoft Business Solutions, which includes the businesses of Great Plains®, Microsoft bCentral™ and Navision a/s, offers a wide range of business applications designed to help small and midmarket businesses become more connected with customers,

employees, partners and suppliers. Microsoft Business Solutions' applications automate end-to-end business processes across financials, distribution, project accounting, electronic commerce, human resources and payroll, manufacturing, supply chain management, business intelligence, sales and marketing management, and customer service and support. More information about Microsoft Business Solutions can be found at:

<http://www.microsoft.com/BusinessSolutions>

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# Data Summary Sheet

Key Features	Description
Service Item Management	<ul style="list-style-type: none"> <li>• Register all your service items and parts, including serial numbers, contract information, component management and BOM references</li> <li>• Access the service level agreement information concerning, for example, response times and warranty information</li> <li>• Track all components of a service item and view their status, for example, find out if a component has been replaced, when it was replaced, and how many times</li> <li>• Access key business indicators on service items, for example, view the cost, income or profit of the service associated with a given service item in any chosen time frame</li> <li>• Improve your troubleshooting capabilities by providing guidelines and procedures for solving service issues</li> </ul>
Service Price Management	<ul style="list-style-type: none"> <li>• Set up, maintain and keep track of your service prices</li> <li>• Assign fixed, minimum or maximum prices</li> <li>• Set up service price groups to take into consideration the service item or service item group that the service task involves or the type of fault, for a limited period of time or for a specific customer or currency.</li> <li>• Define price calculation templates to adjust the different service parameters involved, for example, the parts used, the work types and the service charges.</li> <li>• Have the program automatically assign the correct price structure according to the related service price group when you create a service order,</li> <li>• Generate reports about the profitability of your service price groups and identify irrelevant, non-profitable service price groups</li> </ul>
Service Order Management	<ul style="list-style-type: none"> <li>• Register after-sales issues including service and repair requests, and service orders</li> <li>• Automatically generate service orders, according to the terms stipulated in the service contract</li> <li>• Enter critical information from call center or repair shop</li> <li>• Register ad hoc or one-off service orders</li> <li>• Create customers and service items on-the-fly</li> <li>• Manage equipment lent out to customers</li> <li>• Access complete history on service quotes and service orders through the Service Order Log</li> </ul>
Service Contract Management	<ul style="list-style-type: none"> <li>• Set up an agreement with the customer concerning the service level to be delivered</li> <li>• Create contract quotes and contracts using standard or predefined templates</li> <li>• Have the program automatically create contract renewals and contract invoices</li> <li>• Record details on service levels, response times, and discount levels for each contract</li> <li>• Enable flexible invoicing of contracts</li> <li>• Instant access to contract profitability measurement</li> <li>• Access history of each contract, including associated service items, used parts and man hours</li> </ul>
Planning and Dispatching	<ul style="list-style-type: none"> <li>• Assign personnel to work orders</li> <li>• Assign service personnel and field technicians according to availability and skills</li> <li>• Gain an overview of service load levels and service task prioritizations</li> <li>• Handle task escalations efficiently</li> </ul>
Job Scheduling	<ul style="list-style-type: none"> <li>• Automatically perform service-oriented tasks, for example, send out e-mails to customers upon completion of service of their service items</li> <li>• Perform automatic periodic checks on how many open service orders you have, and print them as a report</li> </ul>

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## System Requirements

Microsoft Exchange Server (min. version 5.5 with service pack 4) for E-Mail Logging for Microsoft Exchange.

Microsoft Navision Attain supports graphical 32-bit technology and genuine client server, multitasking environment. The following operating systems are supported:

Client 32-bit: Windows XP, Windows 2000, Windows NT, and Windows 98

Server: Microsoft Navision Attain Database Server: Windows 2000, Windows NT, IBM AIX, IBM OS/400

Microsoft SQL Server Option for Microsoft Navision Attain: Any operating system supported by MS SQL Server 2000.

Please refer to the detailed system requirements document for more information.



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