



Dynamics NAV Addons

CRM Dashboard

Get a 360 degree view of customers and prospects all from one screen.

- Increase Sales People Effectiveness
- Provide Better Customer Service
- Gain Improvements In Quoting, Ordering, Order Tracking, and Shipment Tracking
- Complete Visibility of Each Interaction and Conversion with Prospects, Customers, and Vendors

The Microsoft Dynamics NAV CRM Dashboard allows Salespeople and Customer Service to have all the information about a customer just one mouse click away:

Date	Time	Comment	User ID
10/23/08	6:43:14 PM	Had a phone call	ALL
10/23/08	6:43:14 PM	Had a phone call	ALL
10/23/08	6:43:14 PM	Talked about different issues...	ALL
04/28/08	12:46:45 PM	Call from David	ALL
04/28/08	12:46:45 PM	Call from David	ALL
04/28/08	12:46:45 PM	Per our discussion attached are NDA and Referral Partner Agreement. I ...	ALL
04/28/08	12:46:45 PM		ALL
04/28/08	12:46:45 PM	We also need to come up with an Appendix to the Partner Agreement tha...	ALL
04/28/08	12:46:45 PM	of a hosted model. In this case you mentioned a mark-up on the SPLA lic...	ALL
04/23/08	2:54:43 PM	E-mail from Bill	ALL
04/23/08	2:54:43 PM	From: Bill Gates [mailto:the_man@microsoft.com]	ALL

CRM Dashboard With Notes

- Users can view how many unpaid invoices, open orders and quotes are in the system for this customer and have the ability to drill down and see the actual documents.



Versions: 3.7x, 4.x, 5.x

Languages: English

Countries: Any

Customer Related Documents With Drill-downs for Easy Navigation

Contact your local provider to order now. For more information call, e-mail or visit our website:

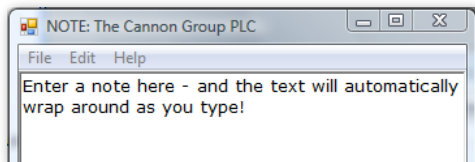
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Dynamics NAV Addons

- Notes can be viewed in summary or detail by using a notepad like feature to capture or copy / paste notes. Users can view all notes from all the contacts from a particular company at any time. The notes also hold the date, time and User ID of the author.



Free Text Notes

- View a complete Sales History by Item, complete with Quantity, Price and Ship Date.

Notes Interactions Sales History To-dos							
No.	Shipment Date	Description	Quantity	Unit Price Excl. Tax	Amount	Document No.	
1968-S	01/01/09	MEXICO Swivel Chair, black	5	190.10	902.97	103005	
1996-S	01/01/09	ATLANTA Whiteboard, base	7	1,397.30	9,292.05	103005	
1964-W	01/14/09	INNSBRUCK Storage Unit/G.Door	10	450.00	4,500.00	103018	
70011	01/14/09	Glass Door	5	111.40	557.00	103018	
1000	03/25/08	Bicycle	10	4,000.00	34,000.00	103028	
10019	03/25/08	Touring Bicycle	20	4,000.00	80,000.00	103028	
1100	03/25/08	Front Wheel	100	1,000.00	100,000.00	103028	
1110	03/25/08	Rim	5	0.00	0.00	103028	
1120	03/25/08	Spokes	2	0.00	0.00	103028	
70100	03/25/08	Paint, black	13	4.10	53.30	103028	

Item Sales History With Ship Date

- View any and all Interactions with a customer – this can include sales and purchase documents, e-mails, faxes, and any other interactions you are capturing through NAV.

Notes Interactions Sales History To-dos					
Date	Description	Document Type	Document No.	Delivery Status	E-Mail Logged
01/22/09	Order 101016	Sales Spt. Note	102028		
01/19/09	Sent E-mail to Customer				
01/19/09	Invoice 103001	Sales Spt. Note	102024		
01/14/09	Sent Fax to Customer				
01/14/09	Order 6005	Sales Spt. Note	102029		
01/11/09	Credit Memo 104001	Sales Cr. Memo	104001		
01/04/09	Order 101001	Sales Inv.	103005		
01/03/09	Order 101001	Sales Spt. Note	102003		
01/02/09	Order 101001	Sales Spt. Note	102002		
01/01/09	Order 101001	Sales Spt. Note	102001		

All Interactions With the Company

By taking advantage of the CRM Dashboard, you can give Salespeople and Customer Service Reps the information and tools they need to spend more time selling and helping customers!

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