Microsoft® Navision Axapta®

Microsoft Navision Axapta Sales Force Automation enables you to establish effective sales processes that help increase sales results and optimize sales costs.

Key Benefits:

- Manage and strengthen business relationships
- Streamline contact management for customers, prospects, partners and other business relationships
- Exchange information with Microsoft Outlook

Key Features:

- An integral part of Axapta with advanced reporting functionality
- Business relations and Contacts windows
- Drag and drop functionality from Microsoft Explorer and Microsoft Outlook

Microsoft Navision Axapta Sales Force Automation

Microsoft Navision Axapta Sales Force Automation gives sales and marketing personnel the tools to track any type of activity targeted at customers, prospects, suppliers and other business contacts. Not only can you log information for general sales support and for automated marketing purposes, but you can also give all employees access to updated information in Axapta.

The Sales Force Automation module is tightly integrated with other Axapta modules used in the sales cycle. As a result, Sales Force Automation is designed to play a pivotal role in your company's customer relationship management strategy.

Manage and strengthen business relationships

Axapta Sales Force Automation enables users to manage business relationships, contact persons, activity planning, sales quotations and opportunities, as well as key financial data for both customers and sales staff. In addition, it provides advanced reporting options that utilize the financial information found in Axapta. You can analyze actual sales against budgets or a given activity with a customer against the profitability of that customer.

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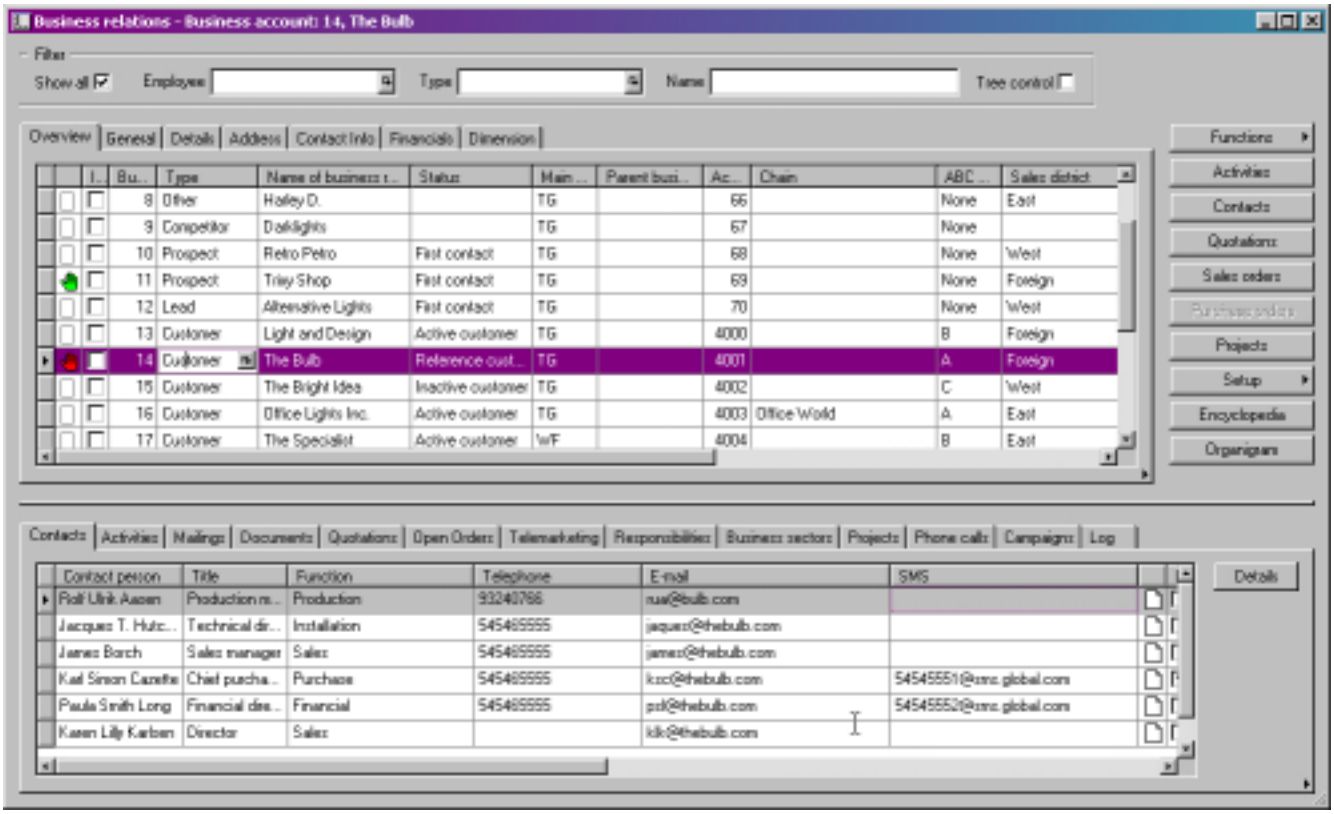

Analyze all aspects of your business relations

Make the data work for you and your team

Sales Force Automation functionality, together with the other modules in Axapta, not only enables the sales department to easily monitor customer accounts, but it also allows every part of your organization to monitor the ongoing activities related to the customer or prospect.

Information that is usually only available to the staff in accounting, sales or production can now be made available to staff in all departments. This helps everyone work together as a holistic team, rather than independently. For example, using Sales Force Automation, any employee answering the telephone can quickly and easily retrieve relevant customer information to help solve a customer's problem.

Business relations window

The business relations window gives you one place to find customers, prospects or partners, and from there you can easily navigate to and track related information including: contacts, activity history, mailings, documents, quotations, open orders, telemarketing call lists, projects and inbound/outbound phone calls. Standard data like phone numbers, addresses and key financial information is also available from this window giving you a quick status report on your company's

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involvement with each customer.

Easy to use

To facilitate ease of use, the Sales Force Automation module uses the standard configuration options in Axapta. This allows you to hide fields and functionality that are not important for a particular user.

Flexible

The module supports work processes for almost any kind of sales organization. Most features can be set up to match your business processes, making the software conform to your company practices and not the other way around. Axapta Sales Force Automation lets your entire business work with the same user-friendly application from accounting, production and logistics to the sales force.

Streamline contact management

Axapta Sales Force Automation enables users to streamline contact management for customers, prospects, partners, suppliers and other business relationships.

The Contacts window is where you maintain all detailed information for each person and business that you deal with. Using this single window, you can plan activities, link documents and mailings to the specific contact, and display the telemarketing call lists the contact has participated in.

Using computer telephone integration, you can also call a contact by simply pressing the phone icon next to the phone number. All phone calls made and received are available in the phone log for historical information.

Drag and drop

Drag and drop functionality from Microsoft Explorer and Microsoft Outlook is available in Axapta Sales Force Automation. Drag and drop means that you can click on an object in one application and drag it over to a target in another application. The object will then be archived in Axapta's standard document management system. When dropped onto the document icon for a given contact person, the document will be attached to the contact person and the business relation on the fly. It will be stored as a document type that reflects whether the drop was from a file, the e-mail inbox or the e-mail outbox.

Import prospects

The Sales Force Automation module allows you to import sales-prospect contact information from database vendors like Dun & Bradstreet. The module lets you import new relations into a journal for quality control before permanent storage in the Axapta database. The solution has a flexible setup for defining the format of the input ASCII file. Different formats may be defined and stored for later reuse. Here, you can register and keep track of interests, loyalty and personal information.

Send messages via SMS

To communicate messages to either your colleagues or contact persons, you can send SMS (Short Message Service) messages from Axapta. This functionality is also made available if you want to send an SMS (using the e-mail group functionality) to a group of people.

Manage sales and marketing activities

The workbook in the Sales Force Automation module is typically the starting point for the sales personnel. The workbook contains day, week and month planners for each employee, “to do” lists and activity details. You can also see your own sales quotations and open orders. And you can check the calendar for your colleagues.

Manage sales quotations

The quotation functionality lets you make quotations for customers, vendors and prospects alike. If the contact receiving the quotation is not already a customer, the system will automatically change the relation type to customer when you convert the quotation to a sales order. You also have the ability to do opportunity and pipeline management, won/lost and SWOT analyses, including quotations and price simulations. The quotation can be printed as a document based on a Microsoft Word template. You can also do a setup where quotations with a probability higher than a certain percentage are included in the master planning.

Quotation status

A quotation can have four different statuses. When you create a quotation, it will get the status *In process*. If the prospect accepts your quotation, you will convert it to a sales order and the status will automatically be changed to *Sales order*. If the prospect does not accept a quotation, and you thereby lose the order, you will set the quotation to status *Lost* (where you can add a reason for losing the order). The last status for your quotation is *Canceled*. These statuses help you to maintain a complete history for every quotation.

Document management

Document handling is greatly enhanced with the document view directly under each contact person and business relation. The document list contains all documents assigned to contact persons, sales orders, quotations or activities assigned to that business relation. A separate window is also available where the user can find all his documents stored in the system. The document management module supports multiple template types.

Managing regular mailings

Using the mailing feature, you can manage mailings of newsletters, product catalogs, etc. The ability to use input from all departments to target your customers, prospects and commercial mailing lists increases your ability to plan effective marketing activities. All mailings are saved in the mailing history

with relevant information on addressees and sent date.

Generate mailings

The “Generate mailings” feature is used to generate a set of mailings using a selection in the database. The generated mailings will be displayed in the mailings window, in the business relation’s window and the contact window. Together with the tools for creating mail merge files and distribution of e-mails to groups, this is an easy way to reach your audience.

Note-it

Sometimes you may need to make short notes or messages regarding a business relation, contact person or quotation. In each of these windows there is a Note-it field in the overview grid for this purpose. When there is an urgent message for other users, the Note-it icon is highlighted with a color code that indicates the severity of the message.

Transaction log

The Transaction log tells you when and by whom a transaction was made in the system. Transactions may be logged on selected tables. This gives you an overview of who is in contact with the prospect or customer and what has been done. The Transaction log contains options for logging creations, deleting and modifying activities, business relations, contact persons, documents, mailings etc. There are features for monitoring activity levels and tracking the source for missing data.

Synchronize information with Microsoft Outlook

Microsoft Outlook integration in the latest version of Axapta is greatly improved. Now, e-mails sent from the contact window will automatically be stored as a document in the document management system in Axapta. The user may even use drag and drop from the document system in Axapta to a Microsoft Outlook e-mail.

Calendar synchronization

You can set up the application to synchronize your appointments and tasks automatically with Microsoft Outlook. Or, if you prefer, you can start the synchronization manually.

E-mail groups

To simplify your work, Axapta Sales Force Automation can now create e-mail groups from your contact persons, employees or sales units. The user may easily send e-mails directly to all members of a group, automatically storing the e-mail with possible attachments as a document. Alternatively, the user may select an e-mail group as a target for an SMS message.

Computer telephone integration using TAPI

The CTI (computer telephone integration) solution uses a telephony application-programming interface

(TAPI) to integrate Axapta with your telephone. The CTI solution makes it possible to call the contact directly from the application with an automatic update of the call, time of call, and call duration in the phone log. When a call is received, the system will automatically search in the database to find the contact calling from the phone number detected. A window will be displayed, with the name of the business relation, the contact person and the telephone number. From this window the user may easily jump to other parts of the system where relevant information is found such as activities, quotations or sales orders by simply clicking a button.

Contact your partner

To learn more about Microsoft Navision Axapta, contact your local Navision Solution Center. They have the expertise necessary to meet your specific business needs.

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Address:
Microsoft Business Solutions
Navision
Frydenlunds Allé 6
2950 Vedbaek
Denmark
Tel +45 45 67 80 00
Fax +45 45 67 80 01
www.navision.com

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Data Summary Sheet

Key Features	Description
Easy to Use	• Intuitive layout and structure • User-adjustable menus, forms and reports • User-adjustable layout of main tables and journals • Windows commands incl. 'copy and paste' from and to Axapta • Direct access to main tables from journals • Advanced sorting and filter options • Built-in user help including an integrated manual • Option to mail and fax directly from Axapta • Application can be run in different languages
Sales Force Automation Overview	• One window containing business relationships of multiple types • Easy access to related information such as sales orders, quotations, projects, activities, mailings and documents for a given business relation/contact person • Overview of financial key figures for each business relationship • Quotations closely integrated to sales orders and master planning • Automated Processes • Generate mailings based on database selections
Contact Management Overview	• Contact management for customers, vendors, prospects and other business relationships • Activity management, appointments and tasks synchronization with Microsoft Outlook • Drag and drop files, documents and e-mails from Windows Explorer and Microsoft Outlook into Axapta's document system • Transaction logging on selected tables • Import business relationships with contact persons • Computer telephone integration using TAPI • Send e-mail and SMS messages to individuals or groups • Generate mailings based on database selections

System Requirements

To obtain all of the features mentioned in this fact sheet, the following modules and technologies are required:

- Microsoft Navision Axapta 3.0
- Microsoft Navision Axapta Trade Series
- Microsoft Navision Axapta Sales Force Automation

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