Microsoft® Navision Axapta®

Microsoft Navision Axapta Sales Management enables sales managers to manage and monitor the activities of individual sales people, sales teams and the entire sales organization.

Key Benefits:

- Manage and monitor sales activities
- Define sales targets for individuals and teams
- Manage the activities of your entire sales organization

Key Features:

- Sales target window
- Graphical displays show sales wins and sales quotations
- Sales statistics management window

Microsoft Navision Axapta Sales Management

Microsoft Navision Axapta Sales Management is tightly integrated with the Axapta Sales Force Automation module so that high levels of efficiency can be achieved between sales and marketing managers and their respective sales and marketing teams.

Establish and monitor sales targets

The sales target window is used to establish and monitor sales targets for each member of a sales unit. After you have assigned your sales staff members to the different sales units, you can browse the visual sales unit “tree” to inspect, define and modify the sales target for each salesperson. Sales targets are defined for each year. The yearly totals can be split into quarterly targets, which can be represented in graphical charts showing actual sales and quotations compared with sales targets for individuals or sales teams.

Establish and maintain a sales pipeline

An important capability provided by the Sales Management module is the ability to establish and maintain a sales pipeline. A visual tool is provided for this.

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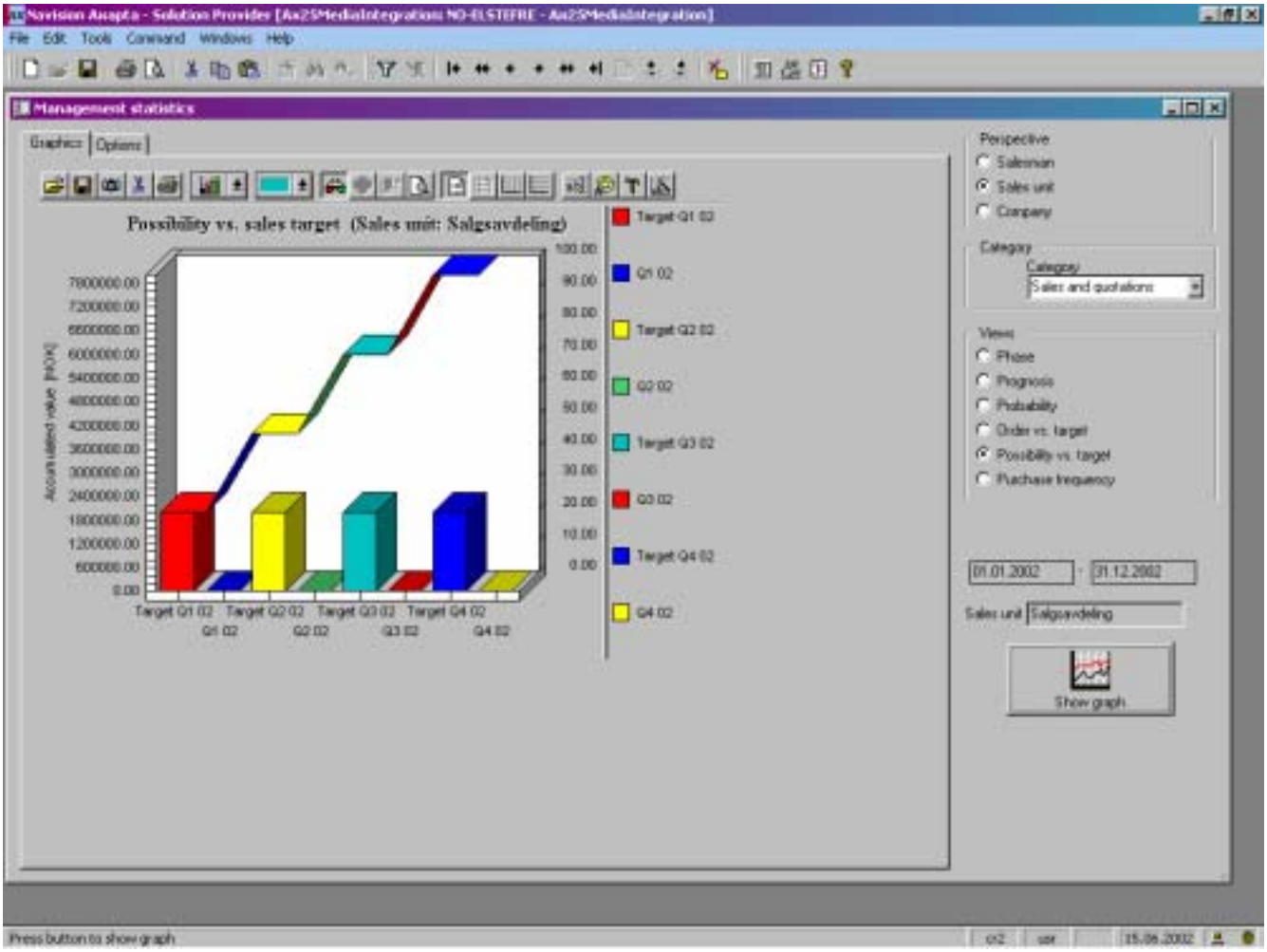

The Sales Management module contains a graphical tool for establishing and maintaining a sales pipeline

Sales and quotations

For better and faster visibility of sales wins and sales quotations, the Sales Management module allows users to display five different types of graphs:

- Phase - the accumulated total amount of sales opportunities for each phase group.
- Prognosis - the accumulated total amount and the weighted amount (amount multiplied by probability) of sales opportunities for each prognosis group.
- Probability - the accumulated total amount of sales opportunities in each probability group.
- Order Versus Target - the accumulated quarterly amount of invoiced sales orders and yet-to-be invoiced sales orders compared to the sales target.
- Possibility Versus Target - the accumulated quarterly amount of invoiced sales orders, not-yet

invoiced sales orders and quotations compared to sales target.

Monitoring responsibility for specific actions

The transaction log contains information about specific changes made to selected tables in the system. It provides four different graphs showing information regarding changes to documents, including:

- New transactions in the selected tables. From this graph, it is possible to get statistics of all new customers, prospects, quotations and sales orders within a given time frame.
- Statistics regarding updates on the selected tables.
- Statistics for all transactions made.
- Activity types: an activity-level report displaying all sales activities for the selected salesperson, the selected sales unit and the company in the selected time period.

Analyze sales data

The Management statistics window in the Sales Management module enables sales managers to monitor and analyze sales data. This window provides assistance to executives and salespeople when monitoring the sales process.

The Management statistics window presents sales statistics in a graphical format that shows forecasts, actual sales and sales activities. This forms the basis for pipeline and opportunity management. The Management statistics window provides a number of different ways to view sales management graphs.

Two different parameters are provided: Perspective and Category. Perspective defines whether the graph shows data for a given salesperson, sales unit or company. Category defines what type of data to present. There are two categories: Sales and Quotations and Transaction log. You select the perspective, category and view to display the desired graph. Active fields change depending on which graph you choose.

Generate sales reports

The Sales Management module makes it easy to generate reports representing sales activities. You get the tools to analyze and report on sales, quotations and sales force activities. This allows you to perform opportunity management and pipeline analysis and to measure sales forecasts against sales targets. It also provides activity level analysis.

The Sales Management reporting tools in Axapta are based on information about sales activities, sales orders, quotations and modifications made on selected tables. You can define sales targets for each salesperson and sales unit, and view graphs of sales and forecasts versus targets.

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.

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

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 Target	• Define sales targets for individuals and teams • Build and maintain a sales pipeline • Generate sales forecasts
Management Statistics	• Manage and monitor activities for sales teams • Track status of sales activities, including pending sales quotations • Track progress and activities of specific sales people • Display sales data graphically • Generate reports for sales quotations as well as activities for salespeople and sales units and at company level • Full range of reports included

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
- Microsoft Navision Axapta Sales Management

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