Microsoft® Navision Axapta®

Microsoft Navision Axapta CRM empowers you to maximize benefits from all of your business relationships and generate profit.

Key Benefits:

- Achieve greater efficiency and lower costs
- Centralize the storage of data
- Gain maximum value from customers by better understanding their needs
- Optimize sales force knowledge with more thorough analysis and greater efficiency

Key Features:

- Single database, single source code, single set of business logic - modified using the same tool box
- Unites ERP and CRM systems
- Marketing Automation
- Sales Force Automation

Microsoft Navision Axapta CRM

A more efficient organization overall

Microsoft Navision Axapta CRM (Customer Relationship Management) saves data in one centralized database. This means that individuals and departments can share information effortlessly. For example, the sales manager can access projects, invoices, order history and current revenue immediately without the sales team having to generate special reports. The result is better pipeline management, improved control and co-ordination of sales force activities and an over all view of contact with customers.

Know your customers

With Axapta CRM, you have an ongoing dialogue with your customers. By knowing your customers and their needs, you can deliver the exact products and services they seek. By servicing their needs effectively, you gain their loyalty.

Optimize sales force efficiency

With all your business information gathered in one database your sales force will be able to manage business relationships more effectively. They will be able to analyze and evaluate activities and easily spot new opportunities because the information is structured and readily available.

Microsoft

Navision became part of Microsoft Business Solutions as of July 11, 2002.

NAVISION®
The Way to Grow

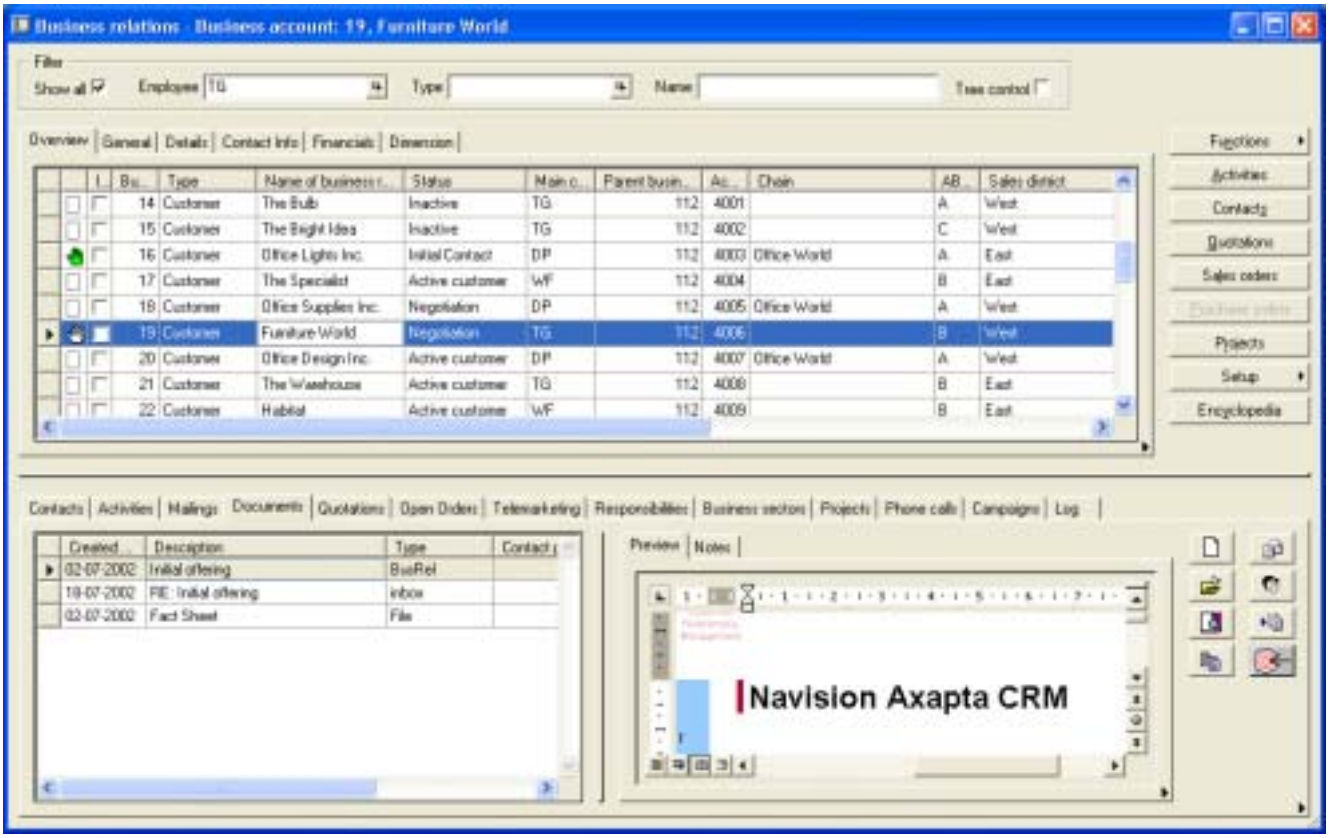
Even on the road, a sales person is not cut off from vital information. By using a mobile phone, a hand-held PC or a browser, they can access customer-related information such as projects, invoices, order history and current total revenue. Closing a deal is also easier with Axapta CRM because the sales representative can do it on location, online. That way a customer can't decide to buy from someone else while the sales representative is on the way back to the office to register the order.

Harvest knowledge from customers and campaigns

The functionality in Axapta CRM lets you generate and manage statistical feedback and measure the success of marketing campaigns by assisting in the creation of market segmentation profiles, which in turn allow for tracking responses and accurate follow-up. Additionally, expenses related to campaigns are tracked for instant cost benefit analysis by analyzing revenue based on campaigns executed.

A more efficient organization overall

Using Axapta CRM, sales managers have access to all relevant sales information without having to ask sales staff to make special reports. This allows for easier pipeline management, better control of sales force and a closer eye on the customer. With the efficiency gained in Axapta CRM, you



Axapta CRM stores all your customer-related information centrally and makes it available throughout your business

will be able to target more customers with a higher win-ratio.

What's more, your entire organization can gain from sales knowledge. Information that is usually only accessible by staff in accounting or sales can now be made available to staff anywhere in the organization – depending on their roles within the business. There are no more walls separating front office and back-office activities.

It is also much easier to plan for the future when you know your customers' needs and preferences. With quality information on their purchasing patterns, you can predict future behavior with greater confidence and accuracy. With detailed, up-to-date information on customers, forecasting production becomes easier and inventory costs fall.

With Axapta CRM, you can also drastically cut administrative costs because the software automates many of your customer-related transactions. This also reduces costs such as telephone calls and sales visits while freeing your staff to attend to other jobs or handle more customers.

CRM and the Web – a perfect fit

With the Internet, it is possible to automate many of the data collection and customer handling routines that previously were so time-consuming and expensive. What's more, with streamlined front office processes, you, your employees, your customers and your vendors can exchange information faster and less-expensively than before.

And because the front-end and back-end systems are joined as one, your entire organization can effectively capture the customer information it needs – anytime, anywhere – over the Internet. For example, contacts, tasks and appointments can be synchronized from Axapta to Outlook and vice versa. It is also possible to synchronize with hand-held devices

All in one

With Axapta CRM, the entire front office and back office are integrated so that they function as a single, powerful tool. Extend and strengthen your customer reach with a seamless flow of information connecting all of your vital business processes including CRM, e-commerce, supply chain management and sales. Work from almost any device – your laptop, mobile phone or hand-held PC. United by a single business logic, database and application, your business is better equipped for success.

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.

Microsoft

Navision became part of Microsoft Business Solutions as of July 11, 2002.

NAVISION®
The Way to Grow

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

© 2002 Navision a/s, Denmark. All rights reserved.

Copyright © 2002 Navision a/s, CBR No. 76 24 72 18. The trademarks referenced herein and marked with either TM or ® belong to Navision a/s. Microsoft, Great Plains and bCentral are either registered trademarks or trademarks of Microsoft Corporation or Great Plains Software, Inc. in the United States and/or other countries. Great Plains Software, Inc. is a wholly-owned subsidiary of Microsoft Corporation. Navision a/s is a subsidiary of Microsoft Corporation. The names of actual companies and products mentioned herein may be the trademarks of their respective owners. No part of this document may be reproduced or transmitted in any form or by any means, whole or in part, without the prior written permission of Navision a/s. Information in this document is based on Microsoft Navision Axapta version 3.0 and subject to change without notice. All rights reserved.

Microsoft

Navision became part of Microsoft Business Solutions as of July 11, 2002.

NAVISION®

The Way to Grow

Data Summary Sheet

Key Features	Description
Easy to use	• Intuitive layout and structure • User-adjustable menu • User-adjustable layout of master files and journals • Windows commands incl. 'copy and paste' from and to Axapta • Direct access to master files 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
CRM and ERP in One	• One business logic, one database, one set of tools and one source code • Front office and back office function as a single, unified system • Entire organization has access to detailed customer information when and where they need it
Sales Force Automation	• Manage business relationships, contact persons, activity planning, sales quotations and opportunities, as well as key financial data for both customers and sales staff • Provides advanced reporting options that utilize the financial information found in Axapta • Analyze actual sales against budgets • Evaluate a given activity with a customer against the profitability of that customer • Allows entire organization to access customer information • Forecast and plan future revenue • Forecast and plan future production based on anticipated sales
Sales Management	• Enables managers to monitor and manage the activities of individual sales people, sales teams, and the entire sales organization, along with providing detailed pipeline analysis of sales in the channel • Easy to generate graphs or reports from sales activities • Analyze and report on sales, quotations and all other sales activities • Perform opportunity management, pipeline analysis, and measure sales forecasts against sales targets • Budget future activities based on up-to-the-minute information
Marketing Automation	• Create campaigns based on selection of table fields in various tables • Campaign administration and distribution • Campaign window with all relevant information at your fingertips. • Connection between campaigns and questionnaire, projects and web response • Automatic creation of follow-up activities with synchronization to MS Outlook • Monitor you ROI by linking the campaign to a project • Broadcast the campaign via e-mail, WEB, fax, letter, call lists • All common campaign reports available
Business Analysis (OLAP)	• Offers decision makers improved reaction time, allowing them to make split-second decisions • Make business evaluations showing the efficiencies (or lack of) of campaigns, resource allocation, and the performance of your sales force and front office staff • Analyze the purchase patterns of customers and the delivery patterns of suppliers

Microsoft

Navision became part of Microsoft Business Solutions as of July 11, 2002.

NAVISION®
The Way to Grow

Document Management

- A common document repository where documents are stored and linked
- All business relationships show a complete view of contacts, sales orders and quotations
- Track and log documents – including e-mails, SMS messages and phone calls
- Marketing encyclopedia for storing all collateral in one place, organized how you need it

Telemarketing / Telesales

- Daily activities automatically mapped out
- Calls lists are generated, telephones dial automatically and call details are logged
- Identifies calls that were not initially successful so a second attempt can be made
- Generate call scripts using the Questionnaire functionality
- Analyze results from questionnaires

E-mail and SMS Integration

- Send e-mails or notes to employees in the field from within Axapta
- Urgent messages reach sales force instantly
- Save time and money in the communication process within the front office

Questionnaires

- Design and generate questionnaires for use in telemarketing / telesales activities for mass mailings
- Allows organization to map responses to knowledge about customers for future planning
- Web-based functionality simplifies execution
- Respondents to a questionnaire are automatically created as users
- When answering a questionnaire from within Axapta, the respondent's user ID is automatically logged so there is no need to login to respond
- Questionnaires grouped by type, with the user defining the groups
- Identify dependencies between questions in questionnaire

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
- Microsoft Navision Axapta Sales Force Automation
- Microsoft Navision Axapta Sales Management
- Microsoft Navision Axapta Marketing Automation
- Microsoft Navision Axapta Telemarketing
- Microsoft Navision Axapta Questionnaire I
- Microsoft Navision Axapta Business Analysis
- Microsoft Analysis Server 2000