Microsoft® Navision Axapta®

Sales Representative Role – Microsoft Navision Axapta Enterprise Portal

With the sales representative role your sales personnel can access and update critical business information online anytime, anywhere.

Key Benefits:

- Broadens the reach of your sales reps
- Opens your back office to your front line sales team
- Easy to use
- Helps you anticipate your customers' needs
- Turns raw sales data into useful information through analysis

Key Features:

- Available anywhere, anytime
- One system for back office and front office
- Intuitive web Interface based on Internet standards
- Complete customer overview
- Extensive report generation including statistical tools

The sales representative role in Microsoft Navision Axapta Enterprise Portal connects your sales team to your business information regardless of time or location. Sitting at their desk, in an airport departure lounge or on the road, your sales reps can easily access, view and update customer and company information stored in Microsoft Navision Axapta. Thanks to the Internet, your sales office is open 24 hours a day, 7 days a week, at low cost.

Liberating your sales reps from the constraints of time and location and extending their reach in terms of the information they can access and where they can access it from, results in a more efficient and more knowledgeable sales team. Ultimately, however, your customers benefit most from accurate, up-to-date information and better service.

Role-based website

Using personalized role-based web sites, sales reps across a business can access all the company information they are entitled to view. Each rep can personalize their own homepage via a button, which allows them to turn elements on and off, re-position items on the page and select from a number of columns, colors and text preferences. For example, a sales rep can select a list of 'favorite' customers whose information will be displayed first in his or her home page.

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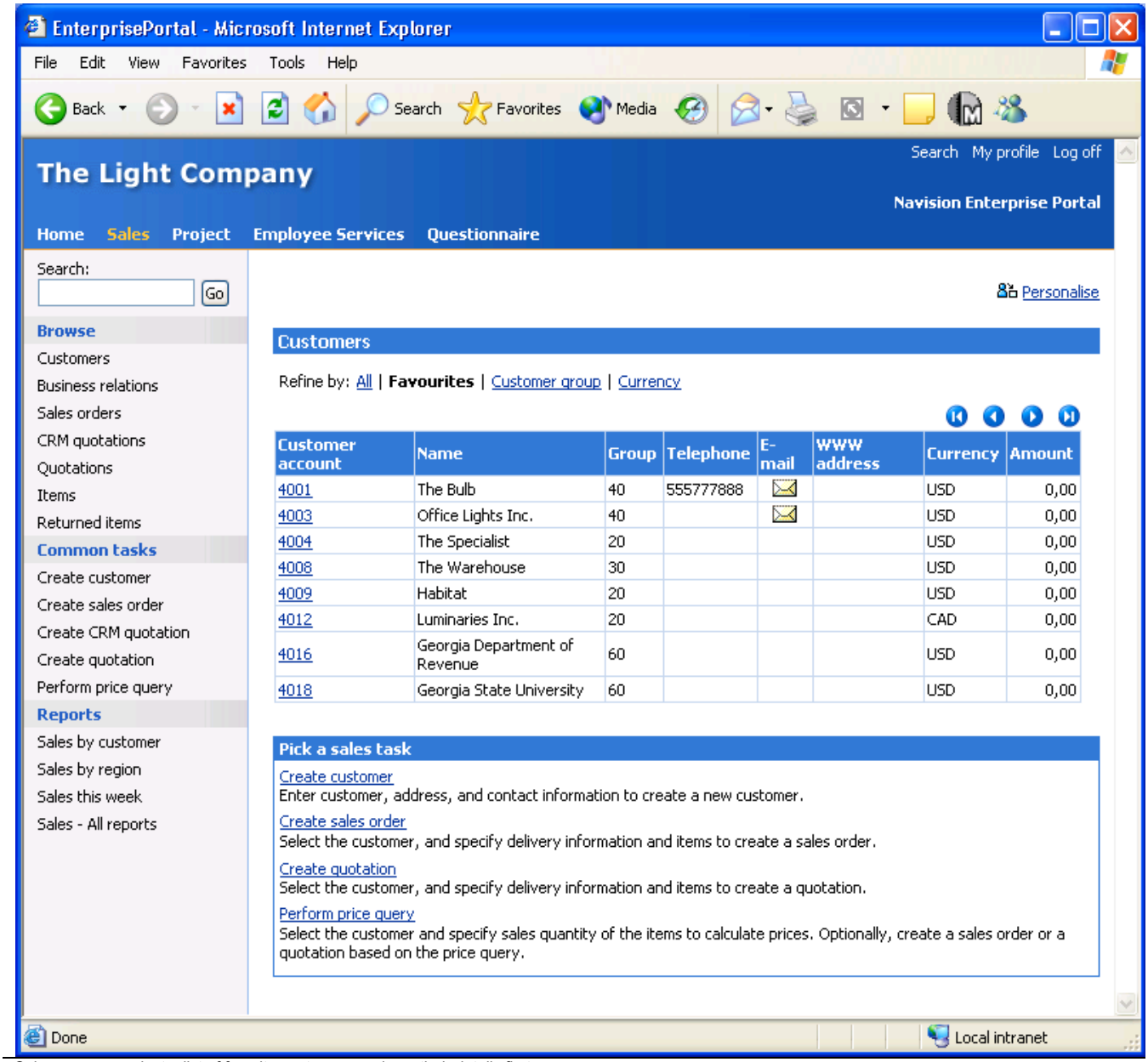


Sales reps can select a list of favorite customers and see their details first

Collaboration

Collaboration is central to the Axapta Enterprise Portal. Because documents are stored in and accessed via a central repository - new and updated documents are immediately available to all. For example, when you change a price list, a sales rep, visiting, customers can immediately see the new prices via his or her personalized portal and begin to work with them.

Complete customer overview

A complete customer overview for each stage of the sales process is on hand for your entire sales team. They can view the customer's key contacts, purchases, payment history and outstanding service requests. Based on this information, your sales team can identify new opportunities for additional sales and new campaign strategies. The sales representative role also makes it easier to share leads, contacts and competitor insights with colleagues.

Communicate with customers via the portal

Campaign material, product collateral and special offers can be sent to customers and prospects by email, directly from the portal. Polls can be conducted on customer websites to gain market knowledge with next to no cost involved. For deeper and more structured information gathering, Axapta Questionnaire can be used.

Sales reps can also create, edit and send quotations, sales orders and credit notes. With Axapta Product Builder and Axapta Logistics, Axapta Enterprise Portal can be used to configure products on the Internet. The sales rep can generate an item based on a customer's specific needs and supply accurate quotations and delivery dates at the bargaining table.

Generate a variety of sales reports

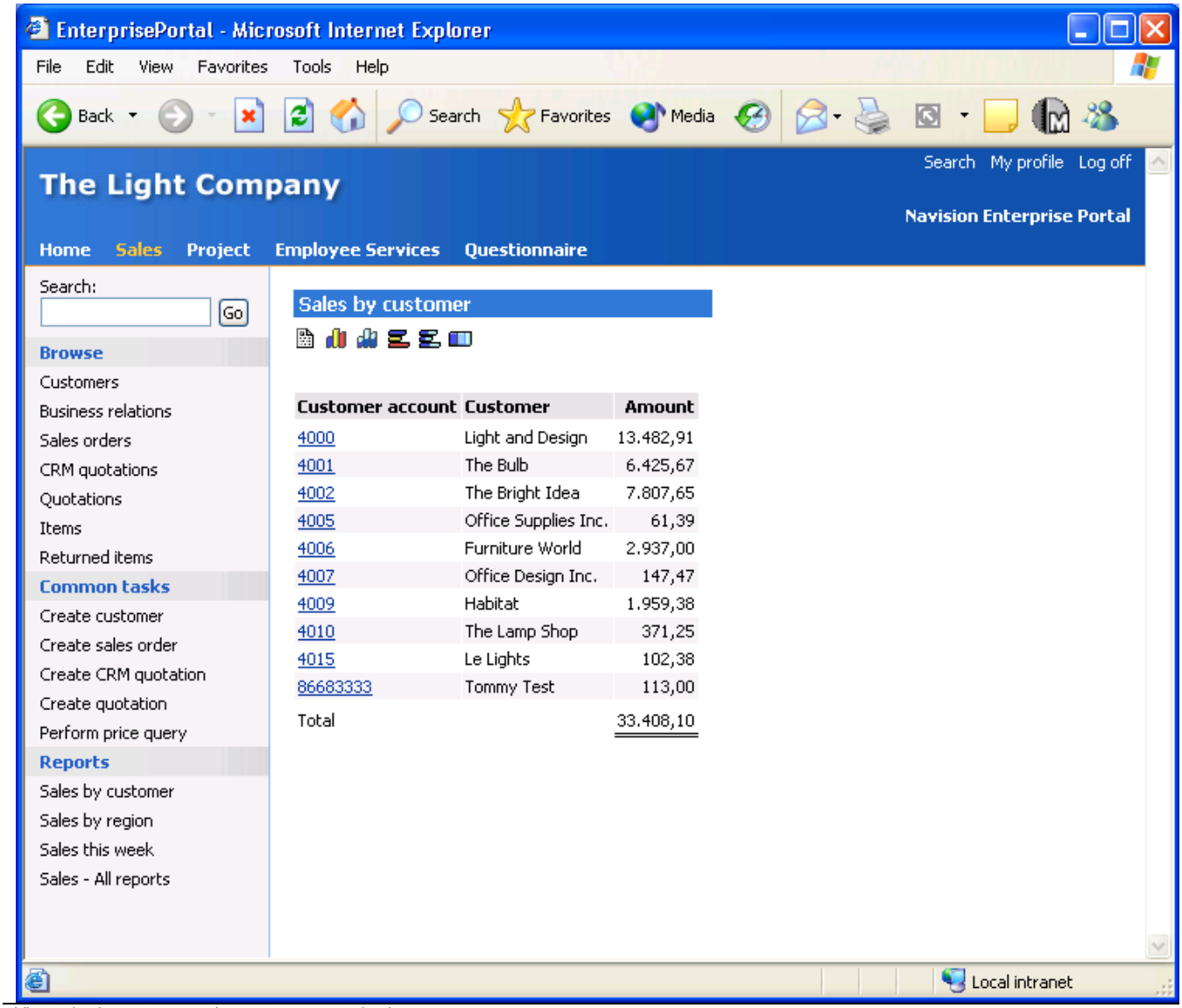
Sales reps can also create and view a range of reports, which can be generated in text format as well as five different graphical formats. The reporting feature also includes extensive statistical analysis, allowing a sales rep to turn raw sales-related data into useful information. Sales can be broken down by week, month, quarter and current and previous year. This information can be viewed by region or by customer.

Sales reps can also view turnover by customer, the company's top 100 customers by revenue and margin, sales forecast per item, blanket orders, sales by person as well as overall pricelists, sales prices and discount lists.

The information in these reports can be sent via email, fax and letter directly from Microsoft Navision Axapta Enterprise Portal.

View documents over the Internet

Axapta Enterprise Portal has a comprehensive search feature, which means that a sales rep can search the entire back office system for documents using keywords. For example, a sales rep in the field can search for an old invoice or sales order for a customer simply by entering one or more key words into a search box on the portal.



View sales by customer and generate a report simply

View PDF files

Sales reps can even view files in PDF format so that the original versions of documents can be pulled up on screen. As a result, the sales rep can pull up an exact copy of a signed contract, for example, for the benefit of a customer.

Easy to use

The consistent and intuitive layout of the sales representative role is easy to navigate around and new users require little or no training in order to be able to understand and use the services. This cuts down on training costs.

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The interface and the navigation follow common Web browser standards including menu bars, click functionality and GUI interfaces. Searches are performed in the same manner as any search on the Internet. All hyperlinks are underlined in blue and employees can bookmark pages just like any Internet page. This means that most users are able to navigate and take advantage of the portal as soon as they log on.

Multilanguage and multi-currency support

Everyone logging on to Axapta Enterprise Portal has the ability to choose from 23 languages and local currencies. Employees around the globe can work comfortably in one system while customers and vendors can view item information, monitor shipping status and make requests in their native language. Also, managers, sales reps and accountants can choose to view reports and forecasts in a national currency as well as a secondary currency such as the euro.

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 mid-market 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:

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Data Summary Sheet

Key Features	Description
Ease of use	• Browser interface • Enterprise Portal can be run in different languages • Easy search function • Easy navigation in views and tasks • Personalization of portal views
Web Tools	• Customized designs to fit corporate profile and design • Layout themes to control fonts, colors, etc. • Web page editor to design and structure the website • MorphX development environment to add new functionality
Multi-language Solution	• Sales representative role available in all of the languages supported by Axapta • Select the preferred language to make the entire website appear in the language of your choice
Sales Tasks	• Guided (tunneled) tasks: - Quotations - Sales order - Perform price queries • Normal tasks - Customers - Customer contacts - Returns of items - Credit notes
Quotation Management	• View Quotations as favorites, by order status or summarized • Create-, edit and accept Quotations • Send quotations via e-mail as PDF documents
Sales Order Management	• View Sales orders as favorites, by order status or summarized • Create and edit Sales orders • Create credit notes • Sales order content: - Customer information & discounts - Delivery details - Items descriptions, dimensions and quantities

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Customer Management

- View Customers as favorites, by group, currency or overview
- Create and edit customers
- Create and edit customer contacts
- Customer history for quotes, confirmation, packing slips, invoices, collection letters and interest
- Customer interaction related to:
  - Quotations and Sales orders
  - Open sales order and backorder lines
  - Unpaid invoices
  - Returned items
  - Price agreements (create and modify)
  - Projects and documents

Item Overviews

- View Items as favorites, by group, type or overview
- Create Returns of items
- Get Item details
  - On-hand status
  - Sales and purchase prices
  - Item dimensions
  - Item presentation
  - Vendor descriptions of the items

See Sales Performance

- Show sales figures using several graphical presentation options:
  - Total sales with drill-down options
  - Sales figures by region
  - Weekly sales statuses
  - All available sales reports

See Item Performance

- Show item performance figures using several graphical presentation options:
  - Top item by quantity
  - Top item by sales
  - Top item by time
  - All available sales reports

Overview

- Customers
- Quotations
- Sales orders
- Items
- Returned items

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 Logistics Series
Microsoft Navision Axapta Trade Agreements
Microsoft Navision Axapta Enterprise Portal Framework
Microsoft Navision Axapta - Employee Role
Microsoft Navision Axapta - Sales Representative Role
Microsoft Internet Information Server

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