Microsoft® Navision Axapta®

# Microsoft Navision Axapta Telemarketing

Microsoft Navision Axapta Telemarketing lets you execute and manage sales and marketing functions from one place.

**Key Benefits:**

- Gather relevant background information about each contact
- Execute calls efficiently using the Telemarketing window
- Attach questionnaires to a call list to gather important information

**Key Features:**

- Access to key customer information from elsewhere in Axapta
- A single window for managing phone calls
- Computer Telephone Integration (CTI) using Telephony Application Programming Interface (TAPI) technology

Designed for sales teams or professional telemarketing groups, the Microsoft Navision Axapta Telemarketing module can be used for a variety of activities including sales-lead generation, customer surveys, direct marketing campaigns, customer support and much more.

### Create call lists from contacts in Axapta

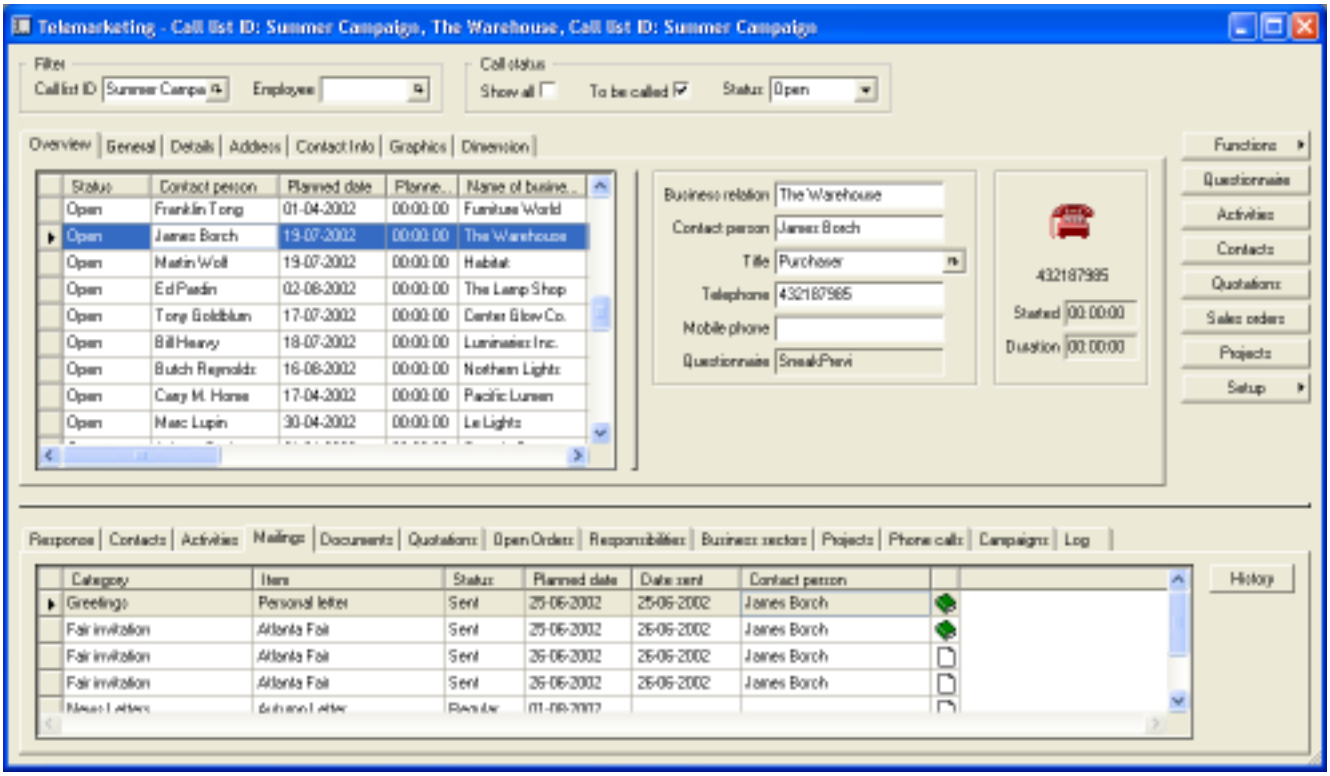
Using the Telemarketing module, you can define a call list using customer and prospect contacts from the business relation and contact table in Axapta. This is achieved using the “create call list” feature.

Different field types can be selected when you are creating a list, so that the final call list contains not only basic contact information, but also background and relationship-oriented information. Call lists can be generated by selecting fields such as sales district, revenue, relation types and segment. Callers can use this information to engage the customer in a dialog, when appropriate.

Microsoft

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

NAVISION®
The Way to Grow




*The Telemarketing window gives you access to all relevant information about your business relations*

## Distribute and manage calls among a group of callers

Once a call list has been created, the Telemarketing module makes it easy to distribute the list among a group of callers. Call distribution can be done in different ways. Selected calls can be distributed to each sales person who has previously been assigned to a set of contacts. Selected calls can also be distributed to callers that may previously have been in contact with certain targets. As soon as an employee has been given the responsibility to call a list of contacts, a task can be automatically set up in his or her activity calendar.

## Execute calls efficiently

To simplify the task of making calls, the Telemarketing module provides a single window for managing phone calls.

To give you a quick and complete overview, the Telemarketing window combines information for the business relation and contact person into one simple view. Callers can see additional information about the business relation including activities, open orders, projects, products purchased, and so on.

By clicking the menu buttons in the telemarketing window, callers can navigate directly to other windows of interest. For example, if a customer would like to place an order during a call, it is easy for the caller to create a sales order or sales quotation.

### Log call status

Every call made via the Telemarketing module is logged. The information that is recorded includes time, duration, who placed the call, and so on. After a call has been made, it gets a new status in the system. The different options are Open, Closed, Call Back and Canceled. If a call is canceled, the reason for cancellation may be added to the call information.

Using the call-log, reports can be generated that summarize the result of telemarketing campaigns. They can also be used to generate new call lists for following up on specific call types such as Call Back.

### CTI integration

The Telemarketing module is equipped with CTI technology, which means that calls can be made directly from the telemarketing window by simply clicking the call button. When the call is finished, the system automatically prepares for the next call in the list. All the caller has to do is to click the call button again.

### Electronic questionnaires

It is possible to connect a questionnaire to your call list if you prefer to use telemarketing for electronic survey purposes.

They can also be used to generate new call lists for following up on specific call types such as Call Back.

### 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

Microsoft

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

NAVISION®
The Way to Grow

© 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.

**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***

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

# Data Summary Sheet

| Key Features | Description |
|---|---|
| **Easy to Use** | • Intuitive layout and structure<br>• User-adjustable menus, forms and reports<br>• User-adjustable layout of main tables and journals<br>• Windows commands incl. 'copy and paste' from and to Axapta<br>• Direct access to main tables from journals<br>• Advanced sorting and filter options<br>• Built-in user help including an integrated manual<br>• Option to mail and fax directly from Axapta<br>• Application can be run in different languages |
| **Telemarketing overview** | • Manage and execute telemarketing activities<br>• Telemarketing window with all relevant information at your fingertips.<br>• Computer Telephone Integration (CTI) via TAPI<br>• Full call logging that includes time, date, duration, caller etc<br>• Range of telemarketing reports |
| **Call list overview** | • Create call lists based contacts in business relation and contacts table<br>• Distribute and administrate calls lists among callers<br>• Integration between call list and questionnaire module<br>• Integration between campaigns and call list<br>• Range of telemarketing reports |

## 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 Telemarketing

Microsoft

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

NAVISION®
The Way to Grow