Customer Relationship Management

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Sales Force Automation

Sales Force Automation Overview

- **Contact management for customers, vendors, prospects and other business relationships**
- **One window containing business relationships of multiple types**
- **Easy access to related information like sales orders, quotations, projects, activities, mailings and documents for a given business relation/contact person**
- **Overview of financial key figures for each business relationship**
- **Activity management, appointments and tasks synchronization with Microsoft Outlook**
- **Quotations closely integrated to sales orders and master planning**
- **Drag-and-drop files, documents and e-mails from Windows Explorer and Microsoft Outlook into Navision Axapta's document system**
- **Transaction logging on selected tables**
- **Import business relationships with contact persons**
- **Wizards**
- **Computer-telephony integration using TAPI**
- **Note-it!**
- **Send e-mail and SMS messages to contact persons, employees, e-mail groups or sms-groups**
- **Generate mailings based on database selections**

Presenting Sales Force Automation

The Sales Force Automation module provides a wide range of powerful capabilities for managing customers and activities throughout the entire sales cycle. Used by sales and marketing personnel as well as management, the Sales Force Automation module enables companies to establish "best practice" sales processes that help increase sales results and optimize sales costs.

The Sales Force Automation module is designed for speed and ease of use. It gives sales and marketing people the tools to keep track of any type of activity targeted at customers, prospects, suppliers and other business contacts. Not only can you can log information for general sales support and for automated marketing purposes, but you can also give all employees access to updated information in Navision Axapta.

The Sales Force Automation module provides the following primary capabilities:

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

Each of the above capabilities is described in this fact sheet.

The Sales Force Automation module is tightly

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integrated with other Navision Axapta modules used in the sales cycle. As a result, Sales Force Automation is designed to play a pivot roll in your company's customer relationship management strategy.

Manage and strengthen business relationships

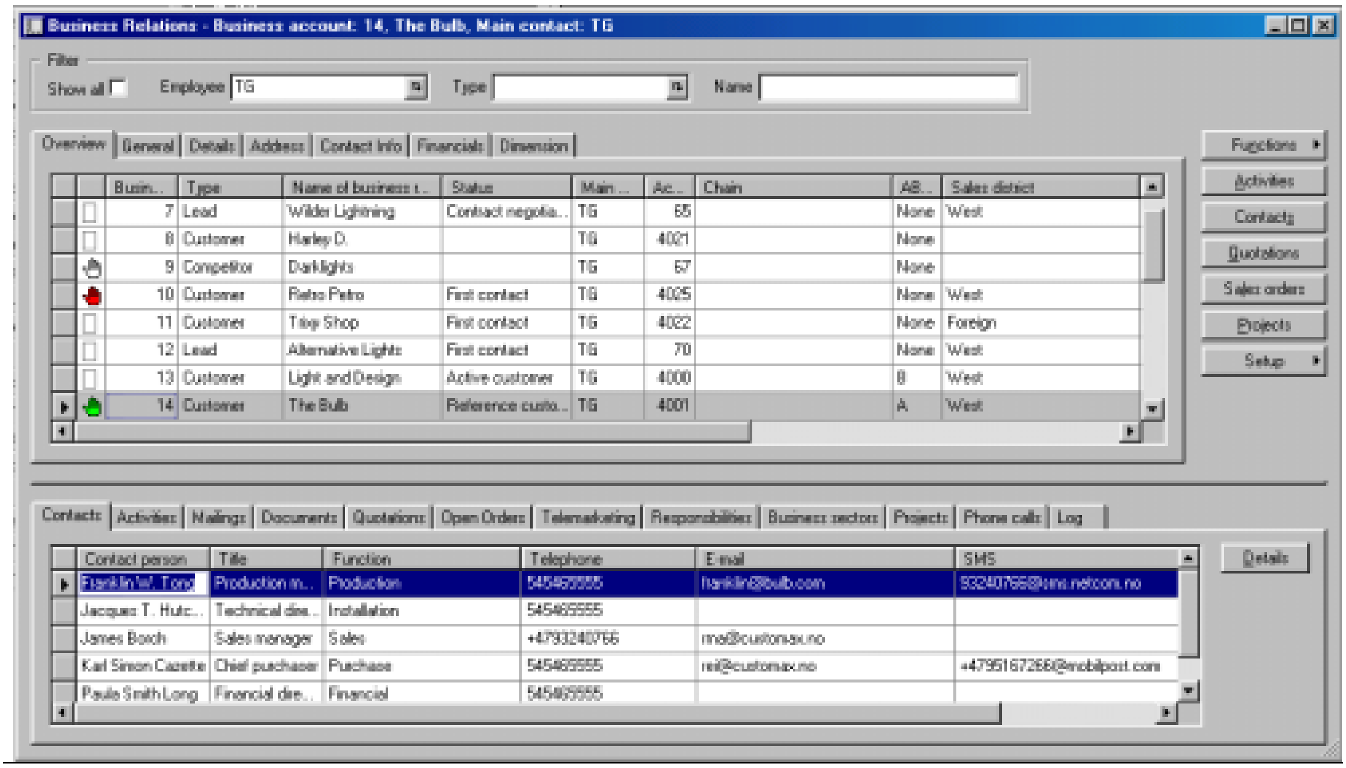
The relationships between you and your customers, partners or vendors are key elements in the success or failure of your company. Navision Axapta Sales Force Automation gives you the tools to manage these important relationships enterprise-wide.

The module 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 Navision Axapta. You can analyze actual sales against budgets. And you can evaluate a given activity with a customer against the profitability of that customer.

Make the data work for you and your team

Sales Force Automation functionality, together with the other modules in Navision Axapta, not only means that the sales department can easily monitor customer accounts, but it also means that every part of your organization can 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



The relationships between you and your customers, partners or vendors are key elements in the success or failure of your company.

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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 relation window gives you one place to find customers, prospects or partners, and from here you can easily navigate to and track any kind of related information; contact persons, activity history, mailings, documents, quotations, open orders, telemarketing call lists, projects and inbound/outbound phone calls. Generic data like phone numbers, addresses and key financial information are of course also available from this window. This information gives you a quick status on your company's involvement with this business relation, and a clear indication as to which way the activities are heading.

Better ease of use in and flexibility

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

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.

Using Navision Axapta Sales Force Automation gives you the unique advantage of allowing the entire enterprise, from accounting, production and logistics to the sales force, to work with the same user-friendly application.

Streamline contact management

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

A singe window for contacts

The Contacts window maintains all detailed information for each person and business entity you interact with. Using this single window, you can perform actions such as activity planning; link documents and mailings to the specific contact, and display the telemarketing call lists the contact has participated in.

Using computer-telephony integration, you can also directly call the 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. 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 Navision Axapta's standard document management system. When dropped onto the document icon for a given contact person, the document will on the fly be attached to the contact person and the business relation and stored as a document type reflecting 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 easily to import sales-prospect contact information from database vendors like Dun & Bradstreet. The module allows importing new relations into a journal for quality control before permanent storage in the Navision 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 that give you that little extra advantage of knowing your customers' needs and preferences.

Send messages via SMS

To send short important messages to either your colleagues or contact persons, it is possible to send SMS (Short Message Service) messages from Navision Axapta. This functionality is also made available if you want to send 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 monthly 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 one or more of your colleagues.

Manage sales quotations

The quotation module allows you to make quotations for customers, vendors and prospects alike. If the business relation 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. In the quotation module, you get the ability to do opportunity and pipeline management, won/ lost and SWOT analyses, excluding quotations and price simulations. The quotation can be printed as a document based on a Microsoft Word template. You can also do a set up 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 receiver accepts your quotation, you will convert it to a sales order and the status will automatically be changed to *Sales order*. If the business relation does not accept a quotation, and you thereby loose the order, you will set the quotation to status *lost* (where you can add a reason for loosing the order). The last status for your quotation is *Cancelled*. These statuses give you the possibility to maintain a complete history for every quotation and every business relation.

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Document management

Document handling is greatly enhanced with the document view directly under each contact person and business relation. The document list (for a business relation) 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 very easily 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 gives you unique possibilities when you are planning marketing activities. All mailings are saved in the mailing history with relevant information on addressees and sent date. You can see both the list of addressees and the template letter text.

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 relations window, and the contact persons window. Together with the tools for creating mail merge files and distribution of e-mails to groups, this forms an easy way to reach all your business relations.

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 colour code that indicates the severity of the message.

Transaction log

The transaction log gives you information about what, 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, deletions and modifications of activities, business relations, contact persons, documents, mailings etc. There are features for monitoring activity levels and tracking the source for missing data.

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Synchronize information with Microsoft Outlook

Microsoft Outlook integration in the latest version of Navision Axapta is greatly improved. Now, when sending e-mail from the contact person window, the e-mail will automatically be stored as a document in Navision Axapta's document management system. The user may even use drag and drop from Navision Axapta's document system 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, the Navision Axapta's Sales Force Automation module 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 a SMS message.

Computer-telephony integration using TAPI

The CTI (computer-telephony integration) solution uses TAPI to integrate Navision Axapta with your telephone. The CTI solution makes it possible to directly call the contact 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, by simply pressing a button, jump to other parts of the system where relevant information is found – like activities, quotations or sales orders.

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