Customer Relationship Management

NAVISION AXAPTA®

Sales Management

Sales Management overview

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

Presenting Sales Management

The Sales Management module provides sales and marketing managers with an extremely powerful tool for managing a wide range of sales activities.

The Sales Management module is tightly integrated with the 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.

Key capabilities provided by the Sales Management module include:

- Manage the activities of individual sales people, sales teams, and the sales organization as a whole
- Establish and maintain a sales pipeline
- Analyze sales data
- Generate sales reports

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

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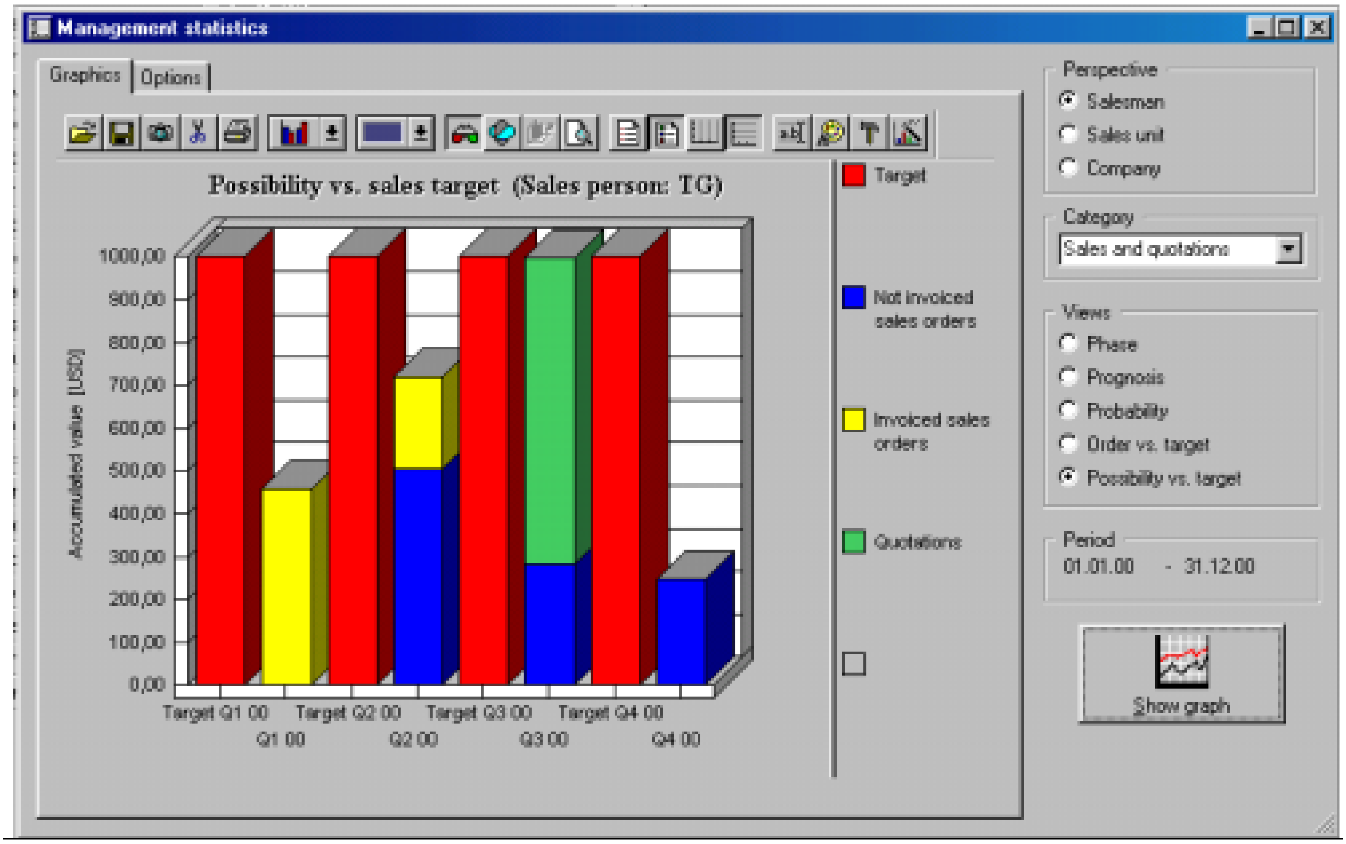
Fact sheet, June 2001, V.2.5

Manage the sales activities for individuals and teams

The Sales Management module enables sales managers to manage and monitor the activities of individual sales people, sales teams, and the entire sales organization.

Sales targets are defined for each year, with the possibility to split the yearly total into quarterly targets. This forms the basis for graphic charts and reporting of actual sales and quotations compared with sales targets for individuals or sales teams.



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

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 of salesperson.

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. As described below, a visual tool is provided for this.

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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.

- The first graph displays Phase. This graph shows the accumulated total amount of sales opportunities for each phase group.
- The second graph displays Prognosis. This graph shows both the accumulated total amount and the weighted amount (amount multiplied with probability) of sales opportunities for each prognosis group.
- The third graph displays Probability. This graph shows the accumulated total amount of sales opportunities in each probability group.
- The fourth graph displays Order Versus Target. This graph shows the accumulated quarterly amount of invoiced sales orders and yet-to-be invoiced sales orders compared to the sales target.
- The fifth graph displays Possibility Versus Target. This graph shows the accumulated quarterly amount of invoiced sales orders, not-yet invoiced sales orders, and quotations compared to sales target.

Monitoring who is responsible for specific actions

The transaction log contains information about specific changes made to selected tables in the system. Who made a modification to which tables, and when were the changes made? To more easily view this information, the Transaction log provides four different graphs.

- The first graph displays 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.
- The second graph displays statistics regarding updates on the selected tables.
- The third graph displays statistics for all transactions made.
- The fourth graph displays Activity types. It is an activity-level report displaying all sales activities for the selected salesman, 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 analyse sales data. This window provides assistance to executives and salespeople when monitoring the sales process.

The Management statistics window presents sales statistics in graphical format that show 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. You select the perspective, category and view to display the desired graph. Active fields change depending on which graph you choose.

Two different parameters are provided: Perspective and Category. Perspective defines whether the graph

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shows data for a given salesman, sales unit or company. Category defines what type of data to present. There are two categories: Sales and Quotations and Transaction log.

Generate sales reports

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

The Sales Management reporting tools in Navision 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.

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