



## Telemarketing Overview

- Manage and execute telemarketing activities
- Create call lists based contacts in business relation and contacts table
- Distribute and administrate calls lists among callers
- Telemarketing window with all relevant information at your fingertips.
- Integration with call list and questionnaire module
- Computer-Telephony Integration (CTI) via TAPI
- Full call logging that includes time, date, duration, caller, and so on
- Range of telemarketing reports

## | Telemarketing

### Presenting Telemarketing

The Telemarketing module is ideal for sales and marketing organizations that want to leverage customer data in Navision Axapta. The Telemarketing module can be used for a variety of activities including sales-lead generation, customer surveys, inside sales, direct marketing campaigns, customer support, and much more.

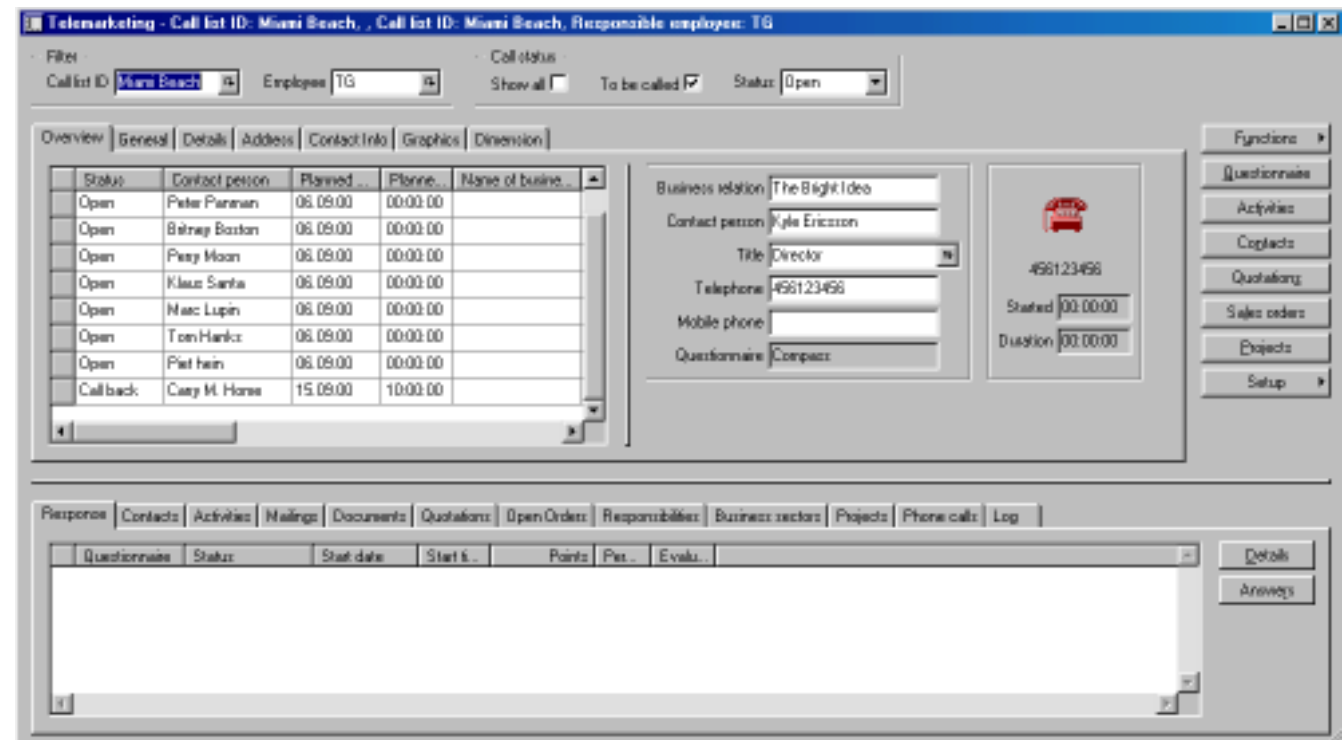
Designed for either sales teams or professional telemarketing groups, the Telemarketing module provides the tools you need to make effective telemarketing activities. Key capabilities provided by the Telemarketing module include:

- Create call list from contacts in Navision Axapta
- Distribute and manage calls among a group of callers
- Execute calls efficiently using the Telemarketing window
- Integrate with your phone system using computer-telephony integration (CTI) and TAPI technology





## Customer Relationship Management



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

### Create call lists from contacts in Navision Axapta

The Telemarketing module makes it possible to define a calling list using customer and prospect contacts from the business relation and contact table in Navision Axapta. This is achieved using the “create call list” feature.

When creating a list, different field types can be selected 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, segment, and so on. Callers can use such information to engage the target in a dialog, when appropriate.

### Distribute and manage calls among a group of callers

Once a call list is created, the Telemarketing module makes it easy to distribute the list among a group of callers. Call distribution can be done in different ways. Select calls can be distributed to the caller or sales person that has been previously assigned to a set of contacts. Or select calls can be distributed to callers that may have previously been in contact with certain targets. In all cases, when an employee gets the responsibility to call a list of contacts, a task can be automatically set up in the caller’s activity calendar.

### Execute calls efficiently using the Telemarketing window

To simplify and expedite the task of making calls, the

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Customer  
Relationship  
Management

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. This includes activities, open orders, projects, products purchased, etc.

By clicking on the menu buttons in the telemarketing window, callers can quickly 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 callers to instantly create a sales order or sales quotation.

### ***Log and call status***

Every call made via the Telemarketing module is logged. Recorded information includes time, duration, who placed the call, and so on. After a call has been made, it will get a new status in the system. The different statuses are Open, Closed, Call back and Cancelled. If a call is cancelled, the reason for cancellation may be added to the call information. The call log makes it possible to generate reports that summarize the result of telemarketing campaigns and to generate new call lists for following up on specific call types such as Call Back.

### **CTI integration**

The Telemarketing module is equipped with a CTI solution using TAPI. This means that when the CTI feature is available for the user, the 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 questionnaire***

It is possible to connect a questionnaire to your call list if you prefer to use telemarketing for electronic survey purposes. All questions and answers are assigned to the business relation and can be displayed later as needed.

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