

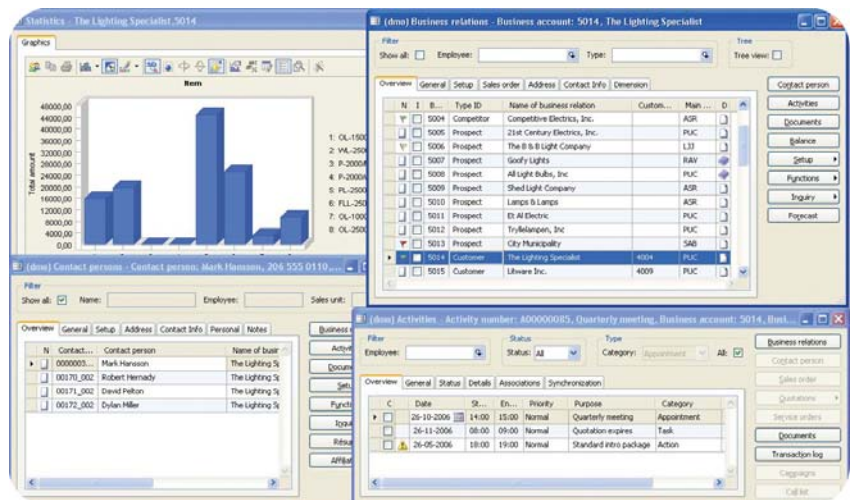
# Sales Force Automation

## Sales Force Automation in Microsoft Dynamics AX

### BENEFITS:

- Customer and prospect related data repository helps increase sales force productivity and effectiveness
- Easily identify and seize sales opportunities
- Company-wide overview of all customer and prospect-related interactions; including correspondence, phone log, auto-generated activities, etc.

Sales Force Automation in Microsoft Dynamics™ AX helps you manage your customer relations more effectively; giving you the insight to help identify your customers' needs and make optimal sales and marketing decisions.



### Increase sales force productivity and effectiveness

Sales Force Automation in Microsoft Dynamics AX is your sales organization's toolbox, containing the tools to organize contact information, track opportunities, manage accounts and establish and monitor the sales pipeline. Time previously wasted on manual, repetitive administrative tasks can be spent more productively by taking care of customers and making sales.

By giving your sales teams insight into each of your customer's needs and purchasing habits, Sales Force Automation helps manage customer relationships more effectively. All customer, prospect and vendor information can be accessed and updated through the business relations window. This presents all information related to the sales flow, including outstanding sales orders, current offers, activities, forecast data and related documents. Using this real-time information, your sales staff can quickly identify up-selling and cross-selling opportunities and predict future behavior, so you can attract and retain customers with the highest lifetime value for your company.

A workbook containing day, week and month planners gives your sales staff an instant overview of all sales activities with "to do" lists and activity details, and helps them work more efficiently. You can view sales quotations and open orders, or check the calendar for your colleagues. You can also synchronize appointments, tasks and contact persons with Microsoft® Outlook® manually or automatically.

Make document handling easier with a document list containing all documents organized by contact person, sales order, quotation or activity assigned to that business relation. E-mails sent from the contact window of Sales Force Automation are automatically stored in the document management system of Microsoft Dynamics AX. Documents can be dragged and dropped from Microsoft Dynamics AX to a Microsoft Outlook e-mail.

## **Identify and act on sales opportunities**

You can quickly view and manage the sales pipeline, from opportunity management to win/loss and SWOT analyses, helping you identify new opportunities, meet customer demands and make confident and accurate decisions based on real-time information.

The quotation functionality lets you make instant quotations based on customer buying history, price simulations, stock availability and delivery dates. If the contact receiving the quotation is not already a customer, the system will automatically create a customer profile, making the information available to the supply chain when the quotation is converted to a sales order. You can assign a different status to each quotation, which helps you maintain a complete overview, and use win/loss and SWOT analysis to help focus future sales efforts. Sales Force Automation can also analyze all sales against a budget, or a specific activity with a customer against the revenue of that customer.

With integration to Enterprise Portal, your remote employees and salespeople on the road can use Sales Force Automation to get contact data, produce quotations and update company sales information from wherever they are, over the Internet. You can even import sales-prospect contact information from third party database vendors, to help identify opportunities and proactively initiate contact with customers and prospects. The mailing feature helps you generate and manage mailings of newsletters, product catalogs and other material, using a selection in the database.

## **Company-wide insight into customers and prospects**

Sales Force Automation is integrated with other modules in Microsoft Dynamics AX, giving customer-facing employees and back office staff real-time information from other relevant parts of the business, so every employee can become a customer expert. For example, using Sales Force Automation, employees can quickly and easily retrieve relevant customer information to help solve customer issues. However, management can decide how much access each department or individual should have to company business information. Also, the system can track every contact with the customer and trace all transactions.

Back office staff can use information from the sales process to keep up with demand and limit excess stocks. You can assign percentage probability values to sales quotations to help make more accurate and timely sales forecasts. Data from other parts of the system can also be used to alert colleagues to crucial customer-specific information, such as customers with poor payment records. Use the Note-It function to insert short notes for other users regarding a business relation, contact person or quotation.

## FEATURES:

### Easy to use

- Intuitive layout and structure
- User-adjustable menus, forms and reports
- User-adjustable layout of main tables and journals
- Windows commands including 'copy and paste' to and from Microsoft Dynamics AX
- Advanced sorting and filter options
- Built-in user Help, including an integrated manual
- Option to e-mail, phone and fax directly from Microsoft Dynamics AX
- Application can be run in different languages
- Microsoft Office integration

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### Sales Force Automation overview

- One window containing information about all your business relationships, current and existing customers, competitors, vendors, etc
- Easy access to related information such as sales orders, quotations, projects, activities, mailings and documents for a given business relation/contact person
- Overview of financial key figures for each business relationship
- Quotations closely integrated to sales orders and master planning
- Automated processes
- Generate mass mailing campaigns and personalized communication, including e-mail and documents based on database selections
- Detailed sales process for easy tracking and follow-up of opportunities and results

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### Contact Management overview

- Contact management for customers, vendors, prospects and other business relationships
  - Activity management, appointments and tasks synchronization with Microsoft Outlook
  - Drag and drop files, documents and e-mails from Microsoft Windows® Explorer and Microsoft Outlook into the Microsoft Dynamics AX document system
  - Transaction logging on selected records
  - Import prospects with business and contact details
  - Computer Telephone Integration using TAPI
  - Send e-mail and SMS messages to individuals or groups
  - Generate mailings based on database selections
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For more information about Sales Force Automation for Microsoft Dynamics AX, visit [www.microsoft.com/dynamics/ax](http://www.microsoft.com/dynamics/ax).

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