

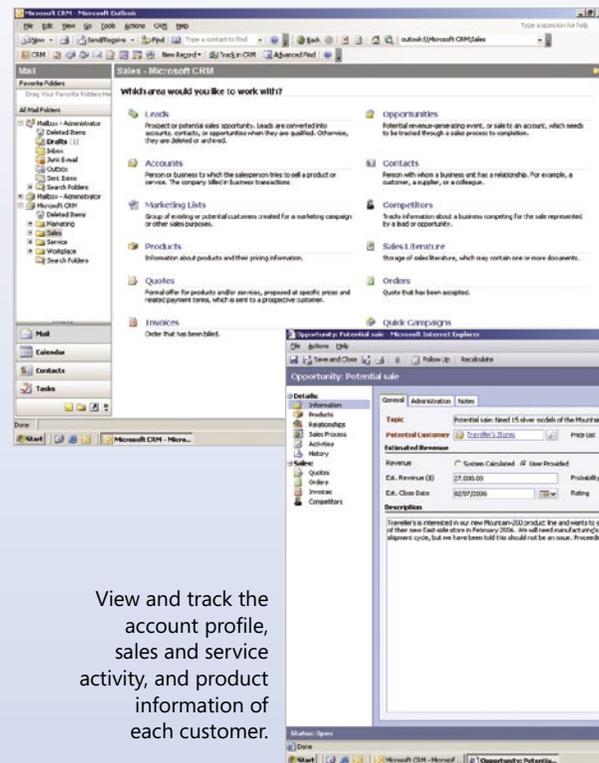
# Microsoft Dynamics™ CRM 3.0

## Sales Datasheet

Microsoft Dynamics™ CRM 3.0 Sales makes it easy to manage leads and opportunities, measure and forecast sales activity, track customer contacts, and automate the sales process — helping ensure a shorter sales cycle, higher close rates, and improved customer retention.

### CRM That Works the Way You Do

Microsoft® CRM fosters user adoption and drives sales effectiveness with its familiar and intuitive native Microsoft Office Outlook® interface and full Web/mobile access.



Manage all activities, e-mail, and sales-related information from within Outlook.

View and track the account profile, sales and service activity, and product information of each customer.

### MANAGE WORK MORE EASILY

Microsoft CRM delivers CRM functionality as a natural extension of Microsoft Office Outlook. Manage customer e-mail, appointments, tasks, and contacts from a single business application.

### BUILD BETTER RELATIONSHIPS

Use a centralized, customizable view of your customer's preferences, relationships, and activity history to better understand and meet their needs.

### IMPROVE SALES QUALIFICATION

Spend time with the right leads and prospects. Establish consistent follow-up processes and automate sales activities with powerful system workflow.

### INCREASE SALES SUCCESS

Shorten the sales cycle and improve win rates with lead and opportunity management, automated lead routing, sales process management, and competitor tracking.

### CULTIVATE NEW SALES

Use simple, wizard-driven sales and marketing tools to keep your sales prospects and customers informed of new product and service offerings.

### ANALYZE SALES PERFORMANCE

Comprehensive reports let you forecast sales, measure business activity and performance, track sales and service success, and identify trends, problems, and opportunities.

### WORK AWAY FROM THE OFFICE

Access full sales functionality online or offline through Microsoft Outlook, or work from any location using the Web client or Microsoft Windows Mobile®-based Pocket PC.

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### About Microsoft CRM

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**Native Microsoft Outlook experience:** Manage your sales, service and marketing relationships within a single business application. Automatically synchronize Outlook E-mail, Calendar, Tasks, and Contacts with your Microsoft CRM database.

**Complete customer view:** View and manage customer account activity and history, including contact information, detailed notes, document attachments, communications, open quotes, pending orders, invoices, and credit limits.

**Lead routing and management:** Track information on prospective customers, then qualify and assign inquiries. Leads can be automatically routed to the correct salespeople or teams.

**Opportunity management:** Easily convert qualified leads to opportunities without data re-entry and then track opportunities throughout the sales cycle.

**Sales process management:** Initiate, track, and close sales consistently and efficiently with workflow rules that automate stages in the selling process.

**Sales and marketing list management:** Import purchased sales and marketing lists to fuel your sales efforts. Measure list effectiveness and maintain marketing lists for annual sales campaigns.

**Quick campaigns and sales campaigns:** Use wizard-driven tools to keep your customers informed and aware of your new products and services.

**Opportunity roles and relationships:** Build and maintain sales relationships enabling your sales professionals to relate to decision makers, influencers, and financial stakeholders within sales opportunities.

**Product catalog:** Work with a full-featured product catalog that includes support for complex pricing levels, units of measure, discounts, and pricing options.

**Quote and order management:** Create and convert quotes to orders, then track and manage orders throughout their life cycle. If a financial application is integrated, invoices for orders are published automatically into Microsoft CRM from that system.

**Quotas:** Use quotas to measure employee sales performance against goals. As opportunities are closed in Microsoft CRM, they are credited against the assigned quota.

**Territory management:** Create territories for salespeople, enabling them to manage and evaluate territory-based sales processes with workflow rules and reports.

**Reports:** View, sort, and filter a wide range of reports to identify trends, measure and forecast sales activity, track sales processes, and evaluate business performance.

**Sales literature:** Create, manage, and distribute a searchable library of sales and marketing materials, including brochures, white papers, and competitor information.

**Competitor tracking:** Maintain detailed information on competitors in a library and associate that information with opportunities and sales literature. Track competitor activity by product, region, or other criteria.

**Workflow:** Automate leads routing, notifications, and escalations. Workflow rules also make it easy to generate and send auto-response e-mail to customer requests.

**Correspondence and mail merge:** Use customizable templates to create and send e-mail to targeted prospects and customers. Print communication materials can be created and sent using Microsoft Word Mail Merge.

Built on the scalable and security-enhanced Microsoft .NET platform and leveraging standard tools and technology, including Microsoft SQL Server™, Microsoft BizTalk® Server, and Microsoft Visual Studio®, Microsoft CRM 3.0 allows you to take advantage of your existing IT investments and in-house expertise to help minimize your total cost of ownership. The product is available on the latest Microsoft operating systems and servers, including Microsoft Windows® Small Business Server 2003 Premium Edition.

Microsoft CRM is available in 22 languages. For more information on Microsoft CRM visit [www.microsoft.com/dynamics/crm](http://www.microsoft.com/dynamics/crm).

A global network of Microsoft CRM partners offers consulting and assistance with product installation, customization, support, and training.

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