

Sales and Marketing

Sales and Marketing in Microsoft Dynamics NAV

BENEFITS:

- **Stay connected and gain mobility.** Create and manage detailed contact information and relevant activities directly within Microsoft Office Outlook®—in the office, on the road, or while working offline—and then synchronize information with Microsoft Dynamics NAV.
- **Keep customer information at your fingertips.** Maintain an overview of your contacts, define individual customer profiles, and easily access specific contact information.
- **Transform information into opportunity.** Identify opportunities and structure and track sales cycles with rich customer information management and reporting capabilities.
- **Analyze performance using powerful reporting tools.** Take advantage of Microsoft Office Excel® and Microsoft SQL Server™ Reporting Services to run contextualized sales reports.
- **Help unify sales efforts.** Share calendar information and activities, to-do lists, relevant documents, and task assignments with team members with Microsoft Windows® SharePoint® Services integration.

Drive successful sales and marketing activities with familiar, innovative tools.

The screenshot displays two overlapping windows from Microsoft Dynamics NAV. The top window is titled 'CP1001 Increase sale - Campaign Card' and shows fields for 'No.' (CP1001), 'Salesperson Code' (DC), and 'Description' (Increase sale). The bottom window is titled 'SM10001 Increase sale - Segment' and shows fields for 'No.' (SM10001), 'Date' (24-01-08), 'Description' (Increase sale), 'Salesperson Code' (DC), 'No. of Lines' (79), and 'No. of Criteria Actions' (2). Below these fields is a table listing contacts:

Contact ...	C..	Contact Company Name	Contact Name	Description
▶ CT100202	H..	A. Datum Corporation	Erin M. Hagens	Increase sale
CT000025	H..	Adventure Works		Increase sale
CT000062	H..	Alpine Ski House		Increase sale
CT000061	H..	Baldwin Museum of Science		Increase sale
CT100189	H..	Coho Vineyard	Michael Alexander	Increase sale

Create targeted campaigns by identifying specific segments based on your contact data.

Equip people in your organization to efficiently manage contacts, opportunities, and campaigns while building customer relationships that help drive sales and encourage loyalty. Sales and Marketing in Microsoft Dynamics™ NAV can help you focus your energy on profitable prospects and customers by taking advantage of connected information and processes and rich integration with Microsoft® Office system programs.

FEATURES:

Outlook integration

Work more productively when you can manage contacts, tasks, and team information directly within Outlook. One-time data entry enables users to create, update, cancel, or delete records and custom forms in Outlook or Microsoft Dynamics NAV and then synchronize information for real-time accuracy.

Contact management

Maintain overviews and classifications for contact companies and individual contacts from within Microsoft Dynamics NAV or Outlook. Define contact records and customer profiles based on specific criteria. Easily retrieve information related to a contact—such as an opportunity, an address, or a comment—using fuzzy logic search capabilities.

Task management

Create and assign tasks in either Sales and Marketing or Outlook. Automated reminders and alerts help ensure tasks are completed on time.

Opportunity management

Define and analyze specific customer and contact information to help take advantage of sales opportunities, monitor the sales pipeline, and track and structure the sales cycle.

Data synchronization

Automate bi-directional or uni-directional data synchronization across Microsoft Dynamics NAV and Outlook based on user preferences.

Offline capabilities

Work offline in Outlook with a selected subset of Microsoft Dynamics NAV data and then perform batch synchronization at the next login.

Campaign management

Identify specific segments or categories in your contact database, and then create targeted campaigns in the languages you choose. Customizable templates and the Microsoft Office Word Mail Merge feature make it easy to create and send personalized print or e-mail communications, while contextualized reports help you measure campaign results.

Sales analysis

View and analyze sales and profitability trends with drill-down and inquiry capabilities, customizable sales reports, Excel-based analysis, and advanced reporting via SQL Server Reporting Services.

Real-time information

Access relevant information from across Microsoft Dynamics NAV, including inventory quantities, order status, and financial information.

Customer interaction log and document management

Log all customer-related interactions, including calls, meetings, correspondence, or activities performed in other application areas. Attach documents and other files to relevant records and track all files.

E-mail logging in Microsoft Exchange Server

Log all e-mail correspondence sent through Microsoft Exchange Server and Outlook to share with team members.

For more information about Sales and Marketing in Microsoft Dynamics NAV, visit www.microsoft.com/dynamics/nav.

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