

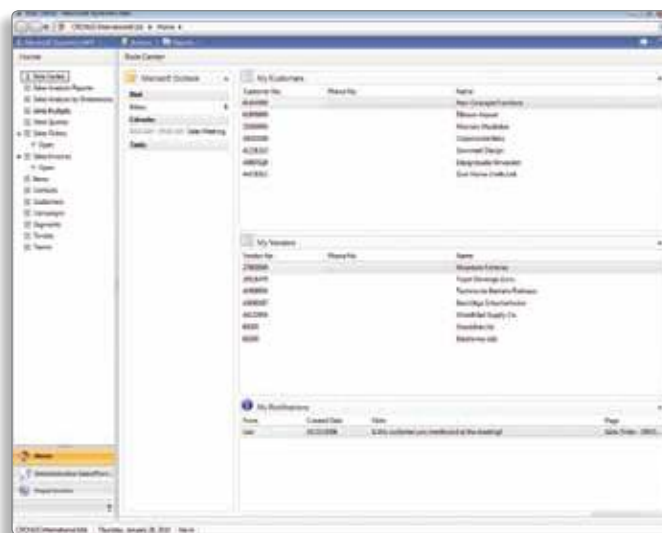


## Sales and Marketing in Microsoft Dynamics NAV 2009

### 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—all from your Role Center.
- **Transform information into opportunity.** Use powerful business intelligence tools to 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 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. Sales and Marketing in Microsoft Dynamics® NAV 2009 equips people in your organization to efficiently manage contacts, opportunities, and campaigns by giving them access to connected information and processes and rich integration with Microsoft® Office system programs.



*Track detailed customer and vendor data with the ability to view open orders and invoices.*

With Role Centers in Microsoft Dynamics NAV, you can access the data, reports, alerts, and common tasks you need to build customer relationships, pursue new opportunities, and help drive sales. You can personalize your Role Center to accommodate your business needs and take advantage of powerful business intelligence capabilities. For instance, you can view key performance indicators (KPIs) based on projected and actual sales figures, or create ad-hoc reports to measure campaign effectiveness and improve market strategy. You can also easily export data to Microsoft Office Excel® to share with coworkers.

## FEATURES

BUSINESS ESSENTIALS	<b>Role Centers</b>	<ul style="list-style-type: none"><li>• Sales Manager</li><li>• Order Processor</li></ul>
	<b>Business intelligence</b>	<ul style="list-style-type: none"><li>• View and analyze sales and profitability trends and customizable sales reports, and share the information using Excel.</li><li>• Access relevant information and KPIs, including inventory quantities, order status, and financial information.</li></ul>
	<b>Outlook integration</b>	<ul style="list-style-type: none"><li>• Work productively when you can manage contacts, tasks, and team information directly within Outlook.</li><li>• Take advantage of one-time data entry to create, update, cancel, or delete records and custom forms in Outlook or Microsoft Dynamics NAV.</li><li>• Automate bi-directional or uni-directional data synchronization across Microsoft Dynamics NAV and Outlook based on user preferences.</li></ul>
	<b>Contact management</b>	<ul style="list-style-type: none"><li>• Maintain overviews and classifications for contact companies and individual contacts from within Outlook or Microsoft Dynamics NAV.</li><li>• Easily retrieve information related to a contact—such as an opportunity, an address, or a comment—using fuzzy logic search capabilities.</li></ul>
	<b>Task management</b>	<ul style="list-style-type: none"><li>• Create and assign tasks in either Outlook or Microsoft Dynamics NAV.</li><li>• Use automated reminders and alerts to complete tasks on time.</li></ul>
ADVANCED MANAGEMENT	<b>Opportunity management</b>	<ul style="list-style-type: none"><li>• 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.</li></ul>
	<b>Contact classification</b>	<ul style="list-style-type: none"><li>• Define contact records and customer profiles based on specific criteria.</li></ul>
	<b>Campaign management</b>	<ul style="list-style-type: none"><li>• Identify specific segments or categories in your contact database, and then create targeted campaigns in the languages you choose.</li><li>• Use customizable templates and the Mail Merge feature in Microsoft Office Word to create and send personalized print or e-mail communications.</li><li>• Use contextualized reports to help measure campaign results.</li></ul>
	<b>Customer interaction log and document management</b>	<ul style="list-style-type: none"><li>• Log all customer-related interactions, including meetings, correspondence, or activities performed in other application areas, and log calls manually using a wizard.</li><li>• Attach documents and other files to relevant records and track all files.</li></ul>
	<b>E-mail logging in Microsoft Exchange Server</b>	<ul style="list-style-type: none"><li>• Log all e-mail correspondence sent through Microsoft Exchange Server and Outlook to share with team members.</li></ul>

Features are organized by Business Ready Licensing edition. Actual editions may vary at the time of licensing.

The Advanced Management edition includes all functionality of the Business Essentials edition and adds functionality to meet expanding business needs.

For more information about Sales and Marketing in Microsoft Dynamics NAV 2009, visit [www.microsoft.com/dynamics/nav](http://www.microsoft.com/dynamics/nav).