

## Microsoft® Navision Attain®

### Benefits:

You need as much information as possible to get the best value from every business interaction. Microsoft Navision Attain CRM – Marketing & Sales delivers real-time information that helps you:

- Personalize your approach to your contacts
- Manage marketing campaigns
- Keep track of your sales pipeline
- Log customer interactions
- Increase customer satisfaction

## CRM – Marketing & Sales

You have the potential to increase your value in every business interaction whether you are working with customers, partners or prospects. Customer relationship management (CRM) is one strategy you can use to improve your relationships and stay one step ahead of the competition. CRM - Marketing & Sales is designed to help you streamline all facets of relationship management from sales force automation to campaign management.

The screenshot shows two overlapping windows from the Microsoft Navision Attain CRM - Marketing & Sales software. The top window, titled 'Estimated Value (LCY) - Opportunities', displays a summary table of sales opportunities by salesperson and month. The bottom window, titled 'Active Opportunity List', provides a detailed view of individual opportunities, including contact information, creation dates, descriptions, salesperson codes, and status.

No.	Name	Apr 2002	May 2002	Jun 2002	Jul 2002	Aug 2002
BD	Ben Davidson	156,000.00	45,000.00	50,000.00	5,500.00	
FC	Fergie Castle	10,000.00	7,200.00	1,100.00	10,000.00	5,000.00
JR	John Roberts	3,000.00	500.00	6,000.00		

  

Contact No.	Creation Date	Description	Salesp... Code	Status	Estimated Closing Date	Estimated Value (LCY)
CT100148	03/15/02	Changing office furniture	BD	In Progress	04/22/02	150,000.00
CT000011	03/20/02	Looking for three-piece suite	BD	In Progress	04/30/02	4,500.00
CT100163	03/20/02	12 green swivel chairs	BD	In Progress	04/30/02	1,500.00

Use Attain to manage your sales pipeline and analyze existing opportunities. Drill down to the details of each opportunity quickly.

When you have accurate information on all your contacts, you can make better decisions about them. CRM - Marketing & Sales makes it easy for you to see which accounts need your immediate attention. You have easy access to information about previous sales and future opportunities with each contact. Your contact and receivables information is always accurate, helping you to make strategic decisions promptly.

Once you have a clear overview of your contacts, you can analyze future demand and plan accordingly. CRM – Marketing & Sales enables you to segment your contact database, helping you to plan effective campaigns as well as one-to-one marketing. It also gives you the means to measure the results of your campaigns.

Conventional wisdom says that holding on to an existing customer is cheaper than attracting a new one. If you don't keep your customers 100% satisfied, you risk losing their business. CRM - Marketing & Sales helps you provide superior service during every customer interaction with easy access to real-time information. Everyone in your company can become a customer service expert. As a result, your customers enjoy a better level of service.

Contact your Navision Solution Center to learn more about Microsoft Navision Attain. The experts there will show you how you can improve your business processes with this remarkable software system.

**Microsoft®**

**NAVISION®**  
The Way to Grow



# CRM – Marketing & Sales Product Overview

## Campaign Management:

- Segment contacts based on specific criteria such as sales, contact profiles and interactions
- Organize campaigns based on segments
- Save and reuse segments
- Mail merge with Microsoft® Word® documents
- Integrate with Multiple Languages to target international contacts

## Contact Classification:

- Classify contacts into different categories
- Tailor marketing messages to suit individual customer needs
- Group contacts into different classes automatically
- Store crucial information for campaign planning and targeting contacts
- Rate contacts based on weights of two questions to identify the value of a third question

## Contact Management:

- Maintain an overview of contacts
- Categorize contacts based on profiling questions
- Personalize your approach to your contacts
- Automatic alerts notify you if you re-enter existing contact information

## Contact Search:

- Search for all information related to a contact, such as an opportunity, an address or a comment
- Fuzzy logic helps to retrieve information even if search term is misspelled

## Document Management & Interaction Log:

- Log interactions such as telephone calls, meetings, letters and e-mail
- Save documents used in interactions
- Maintain accurate records of all interactions with contacts
- Call contacts directly from the contact card using TAPI-compliant telecom devices

## E-Mail Logging for Microsoft Exchange:

- Log all e-mail correspondence sent through Microsoft Navision Attain and Microsoft Outlook
- Server-based solution keeps e-mails in their natural environment

## Opportunity Management:

- Keep track of sales opportunities
- Plan ahead using the pipeline overview tool
- Section the sales process into different stages

## Outlook Client Integration:

- Synchronize to-dos and contacts in Microsoft Navision Attain with meetings, tasks and contacts in Microsoft Outlook
- Create, update, cancel, and delete records in one program and the other program is automatically updated
- Access contact information even when working offline
- Update information through a batch job when working online again

## Task Management:

- Organize campaign, marketing and sales tasks
- Create to-do lists
- Assign tasks to other users or teams of users
- Create activities composed of to-dos

## Operating System Requirements:

Microsoft Navision Attain supports graphical 32-bit technology and a genuine client server, multitasking environment.

### Client:

- Microsoft® Windows® XP
- Microsoft® Windows® 2000
- Microsoft® Windows NT® (Intel) version 4.0, SP6a
- Microsoft® Windows® 98, Second Edition
- Microsoft® Exchange Server version 5.5 SP4 for E-mail Logging for Microsoft Exchange

### Server:

#### Microsoft Navision Attain Database Server:

- Microsoft® Windows® XP NT® (Intel) version 4.0 SP6a
- IBM AIX version 4.3.3 on IBM pSeries machines (RS/6000)

#### Microsoft SQL Server:

- Microsoft® SQL Server™ 2000, Service Pack 1 or later

## Microsoft Business Solutions

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