

Microsoft® Business Solutions CRM

integration



View complete customer information

Integrated Sales and Customer Service functionality let employees view, update and share information across teams and departments.

Streamline processes

Free employees from time-consuming data entry and increase efficiency for sales and customer service processes.

Integrate business systems

Connect customer information and streamline business processes across the organization: Microsoft CRM integrates easily with Microsoft Business Solutions for Financial Management.

Work from any location

Powerful Microsoft Outlook® integration lets salespeople work with sales functionality both online and offline.

Create customized integrations

Working with Microsoft .NET technologies and powerful integration tools, developers can integrate Microsoft CRM functionality with third-party applications and Web services.

Microsoft CRM is **built from the ground up on the Microsoft .NET Framework**, delivering tremendous business value through easy integration with third-party applications and Web services.

Microsoft Business Solutions CRM

Ensure consistency of data across teams and departments, streamline processes, and empower employees with a complete, accurate view of customer information. Built on the Microsoft® .NET Framework, Microsoft CRM ensures low total cost of ownership and high return on investment through powerful, customizable integration functionality.

Multiple pricing lists can be created in the Financials application and used when creating orders in Microsoft CRM.

Taxes, freight, and miscellaneous charges are calculated in the Financials application and then reflected in Microsoft CRM as part of the total cost for an order.

| Item | Unit | Quantity Ordered | List Price | Extended Price |
|-------------------|------|------------------|------------|----------------|
| TABLET PC 1301 | Each | 10 | \$2,400.00 | \$24,000.00 |
| MINI-PC-PROCESSOR | Each | 70 | \$180.00 | \$12,600.00 |
| OPERATING SYSTEM | Each | 70 | \$270.00 | \$18,900.00 |
| ADDRESS SPACE | Each | 70 | \$270.00 | \$18,900.00 |
| STORAGE CASE | Each | 70 | \$270.00 | \$18,900.00 |
| POWER SUPPLY | Each | 70 | \$135.00 | \$9,450.00 |

| Subtotal | Trade Discount | Freight | Miscellaneous | Tax | Total |
|-------------|----------------|----------|---------------|------------|-------------|
| \$67,800.00 | \$5,000.00 | \$200.00 | \$0.00 | \$6,025.00 | \$79,025.00 |

| Field | Value |
|---------------------|------------------|
| Order ID | ORD03004-SUBVTR |
| Name | ORD13007 |
| Customer | A. Dattin-Garcia |
| Price List | RETAIL |
| Detail Amount (E) | 47,845.00 |
| Detail Discount (E) | 5,000.00 |
| Order Discount (E) | 5,000.00 |
| Freight Amount (E) | 200.00 |
| Total Tax (E) | 6,025.00 |
| Total Amount (E) | 47,871.00 |

New orders created in Microsoft CRM can be fulfilled in the Financials application, increasing efficiency and accuracy.

Increasing productivity, reducing cost of ownership

Microsoft CRM Integration

Sales and Customer Service Functionality

- Sales and Customer Service functionality are completely integrated, empowering employees to work collaboratively, and ensuring that customer information updates automatically across sales and service departments.
 - Salespeople can view customer service information that might affect sales processes for an opportunity or customer.
 - Customer service representatives can view complete account information, including sales and orders, to help them identify top customers and evaluate specific customer needs.
 - Sales and service employees can view, share, and update information with individuals and across team departments.
-

Microsoft Outlook

- Salespeople can access Microsoft CRM from Microsoft Outlook, and work online or offline with access to sales functionality.
 - Microsoft CRM e-mail, contacts, appointments, and tasks are integrated with Outlook.
 - With offline access to sales functionality, salespeople can work on the road with up-to-date information for accounts, contacts, opportunities, leads, sales literature, competitors, quotes, products, and more.
 - If a salesperson makes changes to data while working offline in Outlook—for example, updating a quote for a customer—the new information will synchronize with the Microsoft CRM server the next time they go online.
-

Other Microsoft Office Integration

- Integration with Microsoft Word Mail Merge lets users import Microsoft CRM data into Word and easily create and print communications to prospects, customers, employees, and partners.
 - Microsoft CRM data and reports can be exported to Microsoft Excel for sorting and analysis.
-

Microsoft Business Solutions

- Microsoft CRM integrates easily with Microsoft Business Solutions for Financial Management.
 - Integration functionality includes key data mapping for accounts, contacts, product catalog, orders, and prices.
 - Customer information integrates bi-directionally, with account and contact information in Microsoft CRM mapping to customer fields in Microsoft Business Solutions for Financial Management applications.
-

Third-Party Applications and Web Services

- The first business solution built on the Microsoft .NET Framework, Microsoft CRM can be integrated with business and financial systems regardless of platform or programming language.
 - Microsoft CRM ships with Microsoft BizTalk® Server 2002 Partner Edition, including tools and documentation for creating customized integrations with third-party applications and Web services.
 - Working with open application programming interfaces (APIs) and a comprehensive Software Developer Kit (SDK), developers can incorporate Microsoft CRM functionality into custom solutions developed in Microsoft Visual Studio® .NET.
-

Microsoft CRM is designed to meet budget and support needs for businesses. Delivery and implementation through certified Microsoft Business Solutions partners include hands-on assistance with setup and maintenance processes, along with comprehensive training and support resources.