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MICROSOFT DYNAMICS CRM 4.0

Combine Sales Automation, Marketing Campaigns and Customer Records into One

OVERVIEW

Microsoft Dynamics CRM 4.0 is a server-based account management system intended to store and process information about customers, partners, vendors and leads. CRM automates many time-consuming business tasks, like keeping customer records up to date and generating reports from sales/marketing data.

FEATURES OF CRM 4.0

- Uses an Account-based structure to store customer information
- Sales Force Automation system manages the process of converting a lead into a client
- Marketing Automation system maintains Mailing Lists and runs targeted marketing campaigns
- Keep track of customer responses to your campaigns with Account/Contact Notes
- Outlook plug-in for full CRM access in Outlook
- Store Sales Literature in CRM, in case off-site access is needed
- Service Schedules track client appointments and employee activities

BENEFITS

Consolidate customer information into one place. CRM 4.0 is divided into 5 sections: Workplace, Sales, Marketing, Service and Settings. Each section has a specific business function, but works with the same customer data. So employees have everything they need to speak with customers from any angle.

Keep a full history of all contacts with specific clients with minimal effort. Every time an employee has a phone call or email from a customer, they make a quick note of it in CRM. CRM records the time, date, and person who input the information. Anyone referring to that account later on knows exactly what the company has done for that customer recently.

Share CRM information with SharePoint and other Microsoft server applications. Microsoft Dynamics applications can share data through Web Services. Administrators can customize Dynamics CRM to work with other systems, such as ERP and SharePoint. More ways for employees to input information, and use the resulting data in their work.

Customize forms to fit your business processes. CRM 4.0 includes a variety of standard business forms – for entering information, displaying reports, tallying sales totals, etc. Customize any of them with dozens of ready-made fields to collect what kinds of information you want about customers (e.g., business size, which department handles the account).

Track what services you provide, and when. With CRM Service Scheduling, employees record when an appointment is made and what services they provided to the customer. This way, if a pattern of problems is starting with the customer, other employees know about it beforehand. Service tracking helps you move past Band-Aids and onto permanent solutions.

More information: sales@planetmagpie.com