

# Microsoft Dynamics CRM 3.0

## Small Business Edition

### MICROSOFT CRM 3.0 SMALL BUSINESS EDITION MODULES

Sales	<b>Opportunity management</b>	Convert leads to opportunities and track throughout the sales cycle with customizable workflow rules
	<b>Sales process management</b>	Use customizable workflow rules and selling methodologies to ensure opportunities are tracked and closed consistently and efficiently.
	<b>Pipeline optimization</b>	Use analytical tools to provide sales people with qualified sales leads and opportunities.
	<b>Fax integration</b>	Increase productivity within your company by enabling your employees to create, send, and receive faxes right from their desktop.
	<b>Quotes</b>	Create accurate quotes using a full-featured product catalog that supports complex pricing levels, units of measure, and discounts.
	<b>Order management</b>	Convert quotes to orders that can be modified and saved until they are ready to be billed as invoices.
	<b>Sales force management</b>	Measure employee sales performance and credit opportunities against a salesperson's quota as they are closed.
	<b>Sales literature</b>	Create, manage, and distribute sales and marketing materials, including brochures, white papers, competitor information, and more.
	<b>Direct e-mail</b>	Increase sales productivity by selecting customers based on common characteristics, then use templates to send customized e-mails with special offers.
Customer Service	<b>Case management</b>	Create, assign, and manage customer service requests for each case from a central location.
	<b>Complete view of customer information</b>	View all customer information to better understand specific customer needs and answer account-related questions.
	<b>Service scheduling</b>	Manage and schedule even complex services with ease. Understand resource and equipment allocations, utilizations, and effectiveness.
	<b>Automated routing and queuing</b>	Use customizable workflow rules to automatically route service requests.
	<b>Auto-response e-mail:</b>	Use customizable templates and workflow rules to generate and send auto-response e-mails to customer requests.
	<b>E-mail management</b>	Maintain an accurate record of customer communications with automated tracking of customer e-mails that associates e-mails with appropriate customer records.
	<b>Searchable knowledge base</b>	Publish support articles and other relevant support information to a searchable knowledge base.
	<b>Service contracts</b>	Create and maintain service contracts and update contract information automatically when a support case is resolved.
Marketing	<b>Marketing campaigns</b>	Plan marketing campaign strategy based on budgets and expenses, promotion codes, target products, marketing collateral, and more.
	<b>Marketing lists</b>	Create and manage lists for specific campaigns or for future use by any campaign. Create lists using existing customer information or importing contact information from various sources into a single repository.
	<b>Qualify lists</b>	Query lists to locate accounts that meet specific criteria.
	<b>Campaign templates</b>	Create a campaign and re-use it as a template for future campaigns.
	<b>Campaign execution</b>	Track campaign activities, import leads, convert leads to opportunities, view cost and performance data, and more.
	<b>Track marketing information</b>	View campaign performance reports; assess campaign success based on opportunities, cost versus payoff, and other criteria; and analyze marketing results.

**SYSTEM REQUIREMENTS:** Microsoft Small Business Server 2003 Premium Edition

**LEARN MORE ABOUT HOW MICROSOFT CRM 3.0 SMALL BUSINESS EDITION CAN HELP YOU BUILD PROFITABLE RELATIONSHIPS WITH YOUR CUSTOMERS:** [www.microsoft.com/crm](http://www.microsoft.com/crm)