



# SFA – Sales Force Automation

for Microsoft Dynamics CRM

Manage your sales force

## SFA solution provides a complete Sales Force Automation From contact to contract.

SFA solution allows you to streamline and automate your sales and marketing processes to enable your marketing team to generate more leads that are better qualified and enable your sales team to work more efficiently and spend more time selling.

Ensuring that your sales force has a consistent and proven sales methodology supported by innovative productivity tools will help your team achieve measurable sales results.

## Know your customer better!

- > Use the extended **Relationship Charts** to map your relationship with your customers and contacts and partners. When your sales team uses relationships to identify key decision makers, they close more and discount less. They qualify opportunities better and increase sales performance. When you use CRM relationships information, you can profile customers better, define different segmentations and execute targeted campaigns to those specific customers and prospects with the difference that you know and understand them and receive high response rates.
- > Using **Social CRM** capabilities you can easily retrieve information from social networks (such as Facebook, twitter, LinkedIn and more) inside your CRM records.
- > Using **Google Search** extension Get the latest news about your customers using Google Search to find information, News, or view their location before going to a meeting with Google Maps
- > Use the extended **Visit Module**, with the visit module you can easily schedule multiple and recurrent appointments with your existing customers and strengthen your relationships with them. You can control the frequency of visits, when was the last visit date and easily summarize and document your visit and plan the next action items.

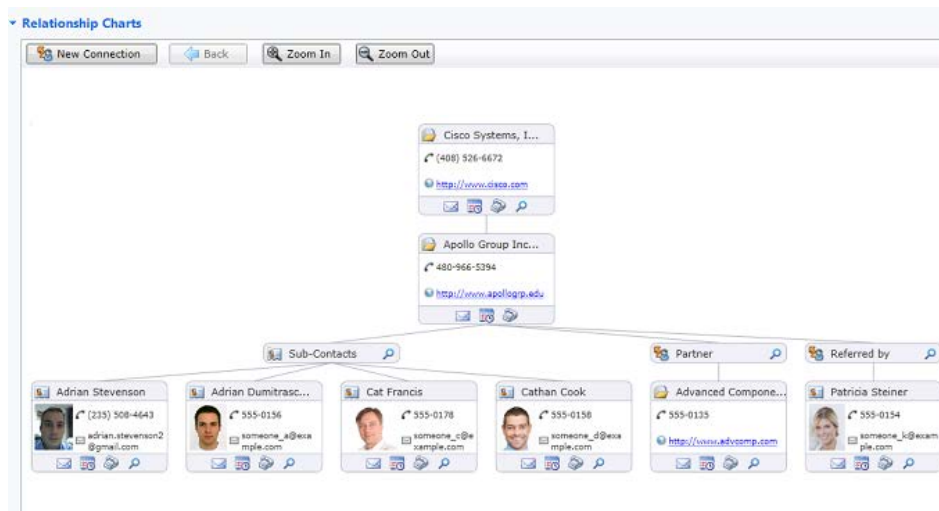
## Key Features:

### KNOW YOUR CUSTOMER BETTER

- > Relationship Charts – view and create diff relationship between customers
- > Social CRM – connect Dynamics CRM with Facebook, twitter, LinkedIn, Google+ and more
- > Google Search– view customer information using Google Maps, Search and News
- > Visits Module – plan periodically visits with your customers and maintain your relationship

### ACCELERATE SALES PERFORMANCE

- > Preconfigured Sales Processes – use preconfigured sales process and automate your pipeline reporting
- > Extended Dashboards – use extended dashboards to view your sales team performance, forecast and user adoption
- > Advanced Assignments – balance your team and utilization based on analyzing their workload before you assign them activities





## Accelerate Sales Performance!

- > **Preconfigured sales processes** - automatic Opportunity probability and revenues calculations according to sales stages
- > **Extended Dashboard** – with extended sales performance and adoption dashboards you can easily control your pipeline, activities and your sales team, top customers and opportunities
- > **Advanced Assignment** - Assign leads and opportunities to sales people based on their overload and capacity

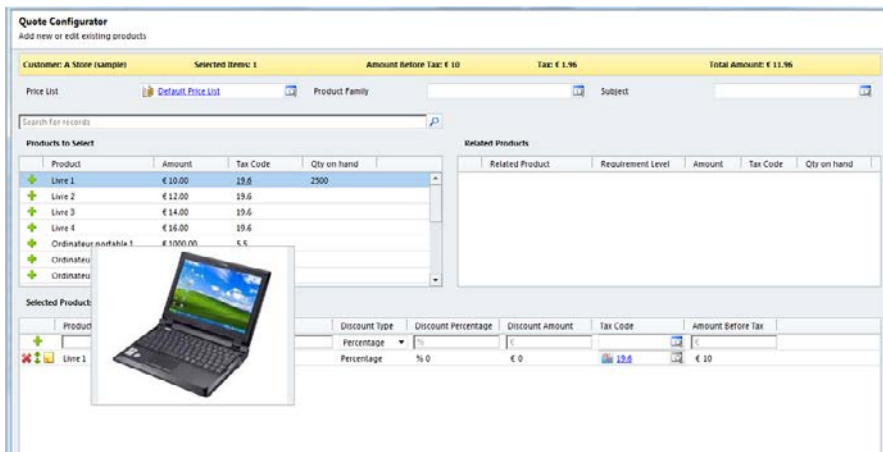
## Quickly create quotes and orders

SFA solution adds enhanced tools which make your sales process more efficient and quicker.

- > **Quote/Order Configurator** – With the extended quote/order configurator you can create quotes quicker and easier and sale more with online cross sale with product recommendation. Save costs by eliminate quote errors when one product required another product. With inline editing you can quickly alter your quote/order products. Find products quickly using extended search capabilities of product families and product trees. Control quote profit by modifying discounts and viewing calculated margins percentages.
- > View products pictures using embedded **Picture Upload** add-on when quoting with the extended.

## QUICKLY CREATE QUOTES AND ORDERS

- > Quote/Order Configurator – configure quotes and orders quickly with improved product search, cross sale functionality and inline editable grids
- > Picture Upload – view product photos while preparing a quote/order
- > Document Publisher – publish any word template or CRM report into PDF document and attach it automatically to emails
- > Discount Management – control discounts and margins either as percentage or fixed amounts
- > Quote approval process – enforce internal quote approval process to reduce mistakes and losses
- > Tax/VAT management – use multiple calculated Tax/VAT per different products or different customers and countries and
- > Copy Quote/Order – save time by quickly coping one quote/order to another and altering only the changes.



- > By using the embedded **Document Publisher** in SFA you can publish and send quotes/orders as PDF in one click! You can publish any customizable word template documents (with/without mail merge) or any CRM Report as a PDF document and attach it automatically to your emails, eventually your sales people only choose which quote/order template they prefer and click "Send!", simple as that!
- > **Discount Management** – you can define discounts in percentage or in amount per the whole quote or per specific product. View the list price of each product next and your actual margin percentage per product or per the whole quote which in the end gives you flexibility in product pricing. Define hierarchic levels of discount approval and maintain your discount policy.



- > **Quote approval process** – Significantly reduce sales people mistakes using quote approval process. SFA comes with prebuilt approval mechanism to approve quotes before they are published and sent to the customer, you can define custom rules using the Workflow Manager and easily approve quotes with role based security.
- > **Tax/VAT management** – Dynamics CRM comes with basic tax functionality in quotation and orders, SFA extends it in different ways. For example you can choose VAT percentage from predefined list of values (instead of manual entry), each product line I quote or order can have different VAT percentage depending on the product, you can define default VAT per customer so all your quotes for this customer will inherit this value.
- > **Copy Quote/Order** – easily copy entire quote/order to a new customer in one click and alter only what is needed.

## Enhance your product catalog

Work with full-featured product catalogs that give you the ability to manage packaged products and single products. SFA adds multiple extensions and tools to Dynamics CRM such as:

- > Ability to defined **relationships between products** such as required dependency between 2 products (one requires the other), cross sale – when selling one product recommending another product
- > Define **product families** and **product hierarchy** and use a product tree to search and find products more easily.
- > **Copy pricelist** – easily copy entire pricelist in one click when you need to prepare new set of pricing for specific customers or segmentations.
- > **Copy product** – easily copy entire product information in one click and alter only what is needed.
- > Use **Bulk update** features when you need to make changes in your pricelists like raising or reducing product pricing based on percentage or costs
- > **Default VAT** - define default VAT per product or customer so when you create a new quote the system will automatically add the right VAT.

## ENHANCE YOUR PRODUCT CATALOG

- > Extended relationships between products – manage relationship and dependencies between to drive cross sales.
- > Product families and product hierarchies – enhance your product catalog by adding new dimensions to your products and then easily search them using a product tree when preparing new quotations
- > Duplicate Pricelists and Products – easily manage your product catalog by duplicating existing product catalog (products and pricelists)
- > Pricelist and products bulk updates make sure your pricelists are up to date by using bulk edit tools on pricing and product records
- > VAT per product/customer Make accurate proposals and eliminate mistakes by adding automatically VAT percentage and value to your quotes depending on your product or customer

### ABOUT US

Founded in 1989, Prodware Group is an international leader in creating and deploying IT solutions for business.

As the largest Microsoft Dynamics partner in the EMEA region, Prodware has 1,700 employees and 20,000 clients across 14 countries.

Supported by significant investment in R&D, worldwide strategic alliances and a wealth of experience in delivering international IT solutions, the group aims to deploy its Prodware Adjust offering globally.

