



Dynamics NAV Addons

a Vertical Leap company



Dynamics NAV Versions

3.7, 4.0, 5.0

Languages

English

Countries

Any

Price

Contact us for pricing information

CRM Dashboard

Addon for Microsoft Dynamics NAV / Navision

Get a complete view of customers and prospects from a single screen.

- ▶ Increase sales people effectiveness.
- ▶ Provide better customer service.
- ▶ Improve quoting, ordering, order tracking, and shipment tracking.
- ▶ Gain visibility of each interaction and conversion with prospects, customers, and vendors.

Tools for Effective Customer Interaction

The Dynamics NAV / Navision CRM Dashboard makes all the information salespeople and customer service needs just one mouse click away. Users can view how many unpaid invoices, open orders and quotes are in the system for this customer and have the ability to drill down and see the actual documents.

Keep Notes on Your Customer Interactions

Users can write and view notes in summary or detail by using a note-pad like feature to capture, copy, and paste notes for each company and customer they interact with. The notes also hold the date and time of the posting, as well as the user ID of the author.

See the Complete Sales History

Users can also view a complete sales history organized by item, complete with quantity, price and ship date.

See All the Interactions with a Company

The addon also creates a list of any and all interactions with each customer. This can include sales documents, purchase documents, e-mails, faxes, and any other interactions captured by Dynamics NAV / Navision.

By taking advantage of the CRM Dashboard, you can give salespeople and customer service representatives the information and tools they need to spend more time selling and helping customers.

Contact your local provider to order now. For more information call, e-mail or visit our website:

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