

SMB SUITE AND MICROSOFT DYNAMICS 365 FOR FINANCIALS

Financials Management | Purchasing | Inventory Management
Sales | Project Accounting | [Opportunity Management](#)

Sales Contact Management

Create contacts and groups to support your business relationships with prospects, customers and vendors.

- Manage your contacts within Outlook or integrate with Microsoft Dynamics 365 for Sales for deeper contact management capabilities
- Automatically synchronize contacts within Outlook for faster customer communication
- Combine sales and CRM data in one system to target products to specific customers

Sales Opportunity Management

Prioritize leads based upon revenue potential and opportunities to close throughout the entire sales cycle.

- Drive leads through the sales funnel using your predefined steps
- Generate sales documents within Outlook and respond to prospects faster
- Integrate with Dynamics 365 for Sales for advanced sales management capabilities

Sales Interaction Management

Set up templates to record, view and manage customer interactions to improve sales, order fulfillment, marketing and service calls.

- Get a complete overview of interactions and know current customer status, from email to order to invoice
- Easily set up interactions tracking by entering your credentials into Outlook
- Track interaction costs and determine the most cost-effective way to convert prospects into sales

Thank you!

Learn more at www.smbsuite.com