

Mobile Sales



Microsoft Dynamics™ AX Mobile Sales

Order taking made intuitive and easy

BENEFITS:

- Leverage the power of Windows Mobile-based devices and help mobile users to become more effective and efficient in their daily tasks.
- Reduce time spent on manual and paper-based processes, and help eliminate non-productive downtime between sales calls.
- Provide onsite product pricing, fulfillment, and delivery information.
- Enable sales representatives to look up customer and product information virtually anywhere and transmit sales information back to head quarters in real time.
- Get information on customers and promotions before sales calls to profit from up-sell and cross-sell opportunities.
- Use mobile technology to plan the most efficient route for sales visits; make adjustments on the fly when needed.
- Leverage existing investments in enterprise systems.
- Easily modify the application to meet the needs of different roles and to add company specific functionality and processes.

Microsoft Dynamics™ AX Mobile Sales is the first mobile application for Microsoft Dynamics AX. Mobile Sales is RoleTailored and task-oriented and an ideal solution for field sales representatives and other mobile employees who need to work in remote locations. Using Mobile Sales, field sales representatives can plan visits, review relevant sales information, and create orders. Mobile employees can use the calendar and task functionality of Microsoft Pocket Outlook® directly from the application to get a full view of their daily activities.

Mobile Sales consists of small task components, tasklets, which can be combined in numerous ways to cater to individual needs. The RoleTailored application leverages the power of Windows Mobile®-based devices and helps mobile users become more effective and efficient in their daily tasks.

Mobile Sales is easily modified to meet the needs of different roles and to ensure that users receive key information and processes in an easy-to-understand way.



Mobile Sales can work offline as well as online and takes advantage of a local database to enable offline operation during periods of limited or no network connectivity.

Mobile Sales supports barcode scanning and works with Microsoft Office Mobile to provide access to tasks and appointments via Microsoft Exchange Server 2007 on a Windows Mobile powered device.

FEATURES:

Home Page	<ul style="list-style-type: none">• This is the entry screen for the application. It includes a series of shortcut icons to help you easily navigate to your main tasks.• You can configure and design the Home Page for different roles.
Mobile Order Taking	<ul style="list-style-type: none">• Enable flexible order taking using the workflow wizard, which is accessed from the customer overview. The standard steps in the wizard include: Campaign Overview, Campaign Products, Assortment, Order Overview and Signature.• View campaign products for a specific customer, time horizon, or other criteria. They can select the products to order, review the details on the Order Overview screen, and make any changes before the order is submitted to the server. Bar code scanning is supported for specific devices when ordering through the Assortment. Digital signature screens and order comments are also supported.• Configure the order wizard to include the necessary steps for capturing an order. Steps that are not required can be excluded and additional steps can be added.• Other features include: Order history on customers, copying orders, and activity history on customers.
Activity Planning	<ul style="list-style-type: none">• View an Activity Plan showing planned customer visits for a specific day and appointments from their Outlook calendar. Outlook appointments can be created, changed, and deleted directly from the Activity Plan. Professional and private appointments are stored separately.• View additional information about a visit or an appointment in the details section. Furthermore, customer visits can be categorized, the purpose of the visit can be added, and finally the visit can be marked as completed.• Edit and change route plans, as needed.
Customer Overview & Search	<ul style="list-style-type: none">• Open the customer search screen from the Home Page. Here, they can filter by and search through all customers in the local database on the device.• Access a master detail screen and view additional details. E.g. customer basic information, addresses, customer comments, and primary contact person.• Both search and master detail screens are configurable — search fields can be added to the search screen, and the detail section can show additional customer master data.

Pocket Outlook Task Integration	<ul style="list-style-type: none"> The Microsoft Pocket Outlook task integration enables users to create, update, and delete tasks, as well as open a full list of tasks.
Product Assortment	<ul style="list-style-type: none"> Access information on the customers' Product Assortment, which can be used in relation to order creation, for example. From Product Assortment, select a product and enter quantity or view additional information in a details section. Assortment is configurable to enable customization of the Assortment list view such as adding additional data, changing the sort order, and modifying the standard width of the columns.
Campaign Information	<ul style="list-style-type: none"> The Campaign Overview screen displays a list of all active campaigns in the local database. Filter campaigns and see additional information about the campaign in the details section. For example, view customer specific or time specific campaigns. Each campaign displays the products related to a particular campaign.
Image Viewer	<ul style="list-style-type: none"> Mobile Sales includes an image viewer. The image viewer is utilized both for Product Assortment and Mobile Order Taking.
User Interface (UI)	<ul style="list-style-type: none"> UI with advanced controls with a Microsoft Dynamics and Windows Vista® look and feel The UI supports both portrait and landscape
Configuration	<ul style="list-style-type: none"> Orchestrate the features of Mobile Sales in alternative ways and to add company specific functionality and processes. Change the flow of the application and the ordering wizard to suit your needs. Configure the entire application to suit individual needs and preferences.

SYSTEM REQUIREMENTS:

TO OBTAIN ALL THE FEATURES MENTIONED IN THIS FACT SHEET, THE FOLLOWING TECHNOLOGIES ARE REQUIRED:

Microsoft Dynamics™ Mobile Development Tools

- Mobile Framework (including all the requirements listed in the Mobile Development Tools Fact Sheet)
- Mobile Server (including all the requirements listed in the Mobile Development Tools Fact Sheet)

Mobile Client

- Windows Mobile Pocket PC 5 or 6 Classic/Professional Edition Devices (QVGA only)
- .NET Compact Framework 2.0 SP1
- SQL Server™ 2005 Mobile Compact Edition 3.0

Development Toolkit

- Microsoft Visual Studio® 2005

TO OBTAIN THE FEATURES MENTIONED IN THIS FACT SHEET, THE FOLLOWING MICROSOFT DYNAMICSTM AX MODULES ARE REQUIRED:

Microsoft Dynamics™ AX

- Business Ready Licensing – Advanced Management Foundation Pack

Connectivity and synchronization may require separately purchased equipment and/or wireless products (e.g., WiFi card, network software, server hardware, and/or redirector software). Service plans are required for Internet, WiFi and phone access. Features and performance may vary by service provider and are subject to network limitations. See device manufacturer, service provider and/or corporate IT department for details.

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