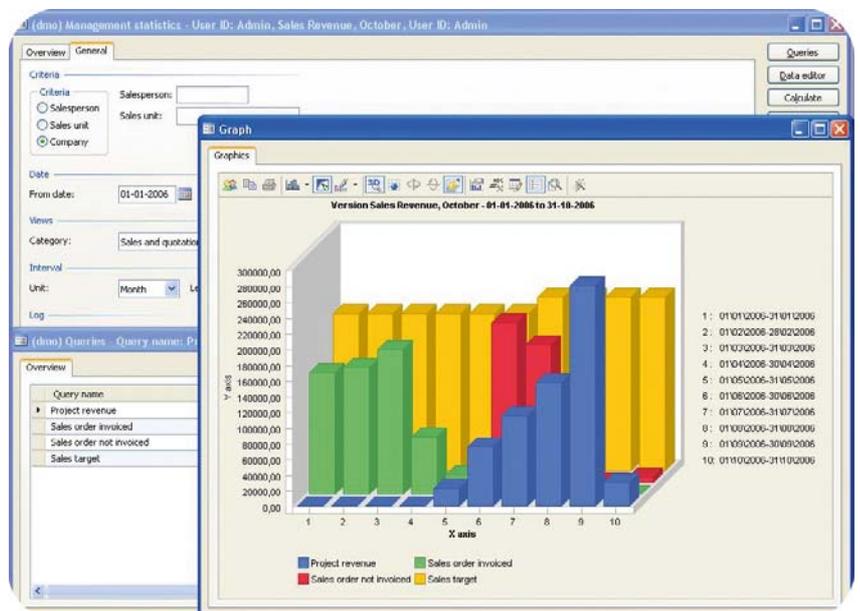# Sales Management

Sales Management in Microsoft Dynamics AX

BENEFITS:

- Advanced tool for detailed sales activity analytics

- Possible to better understand the sales pipeline..

- Graphical views for representing large amounts of data in both an easy and understandable way

Sales Management in Microsoft Dynamics™ AX is a window into the heart of your sales operations, providing a detailed view of your sales pipeline. With this solution you can view and analyze the activities and performance of individuals, teams and your entire sales organization, broken down by your choice of registered values.

Are your sales teams going to reach their quotas? Why is one region out-performing another? Which accounts are doing well? Sales Management in Microsoft Dynamics AX offers you a set of easy-to-use tools that provide graphical views of key sales-related information. Opportunity and pipeline management are made easier because you can achieve an instant overview of your sales and marketing efforts.

Sales Management in Microsoft Dynamics AX is closely integrated with the Sales and Marketing in Microsoft Dynamics AX module, in order to provide efficient collaboration between sales and marketing managers and their teams.

Microsoft Dynamics™ AX

Set up sales targets and view performance

Establish and monitor sales targets for each member of a sales unit in the Sales Target window. Once a target has been assigned to an individual, you can browse and modify the targets quickly and simply. A couple of clicks can give you an instant overview of your sales targets. Graphical charts can be set up to give the user a versatile tool to show, for example, your actual sales and quotations compared with sales targets for individuals.

Manage your views of Microsoft Dynamics AX Data

To gain a greater insight into large amount of sales data, Sales Management can be set up to give a user greater control of the data. The user will have a panoramic view of values stored on your database and will thus be able to provide the exact views required by your company's needs For example: If you wish to see your sales data sorted by a specified value the administrator can open any field for the user to specify groups of data or values returned.

Managing Your Sales Data

In order to analyze your sales data, you need to see the data stored by the values you decide, and the values you choose to analyze should be the ones that are most important to you. You want to see margins on different types of customers, discounts given by individual sales representatives, or revenues sorted by types of items sold. You can easily track the average sales orders, the sales representatives with the least activities, the number of campaign participants, and more.

The transaction log records the changes users make to selected tables in the system. It provides four different graphs showing, for example, statistics of new customers, prospects, quotations and sales orders within a given time frame, or an activity-level report displaying all sales activities for an individual salesperson, sales unit or company within a selected time period. This helps you get real-time insight into all sales activities, so you can identify opportunities and act on them faster than the competition.

Establish and maintain sales pipelines

The management statistics window shows the status of your entire sales pipeline with a variety of default graphs. Viewing options include the sales phases, probabilities, and actual and possible sales versus target, as well as purchase frequency. To better understand where your business is going you can analyze and compare data from any time period of your sales history.

View your data from multiple angles including costs, revenue, margin, discounts, number of records, highest and lowest values. You can break the sales process into components to see where profits are being won and lost. You can also view your company's performance by the contributions of individuals and groups of employees or by existing and potential customers, to get a detailed, actionable understanding of your sales activities.

FEATURES:

Sales target	Define sales targets for individuals and teams
	Build and maintain a sales pipeline
	Generate sales forecasts
Sales management administration	Open any table in Microsoft Dynamics AX for analysis
	Pick fields and methods to be applied by the user
Management statistics	Define groups of data by values or period intervals
	Sum values from the table fields or methods chosen
	Find your highest, lowest average and count in any data set
	Display sales data graphically

For more information about Sales Management for Microsoft Dynamics AX, visit www.microsoft.com/dynamics/ax.

Microsoft