

Summary

Powertrak Core out-of-the-box features extend and enhance Microsoft Dynamics CRM 3.0

Across the board, Powertrak Core delivers capabilities like Enterprise Views and Relationship Tracking, and time-saving features like Pipeline Manager, Mass Updates and De-Duplication management, that bring Dynamics CRM 3.0 to an even higher level of productivity. Together Dynamics CRM 3.0 and Powertrak bring tremendous value at a competitive price.

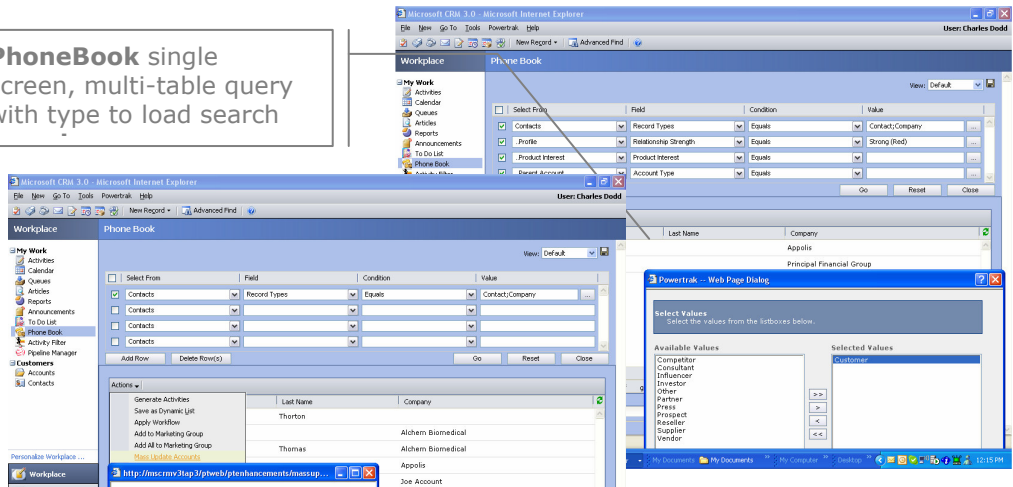
Powertrak v8.0 CORE Overview for Microsoft Dynamics CRM 3.0

Microsoft Dynamics CRM 3.0 adds great enhancements over version 1.2. However, the specific baseline features contained in Powertrak Core are not in 3.0 and can't be added without extensive custom development efforts outside the Dynamics CRM 3.0 tools. All Powertrak Core features continue to provide great value at far less cost than a custom build out. Because Powertrak Core and the Powertrak Application Builder are certified, our customers and partners can rely on continuing warranty coverage and support. Upgrades are seamless, and there is no need to worry about internal IT costs, turnover and change issues that always result from custom development.

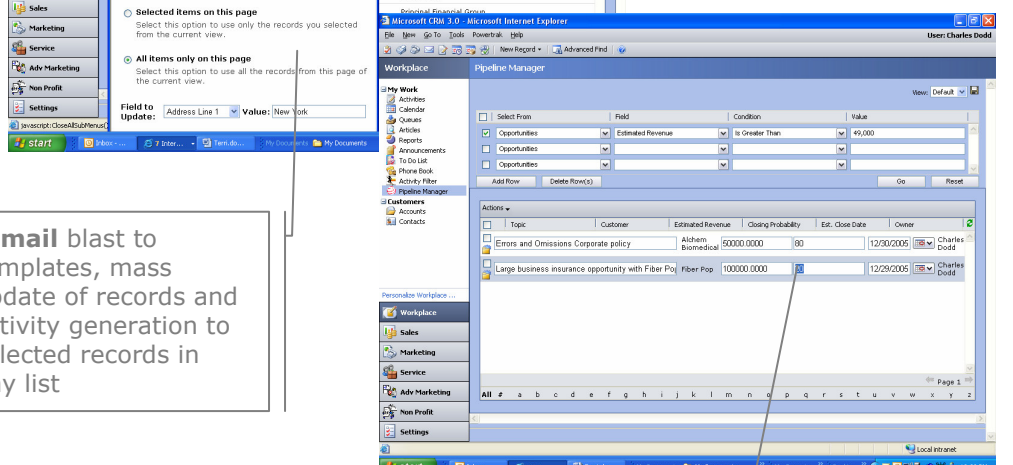
As we continue to add new features into Core, customers benefit automatically from the 9 years of award-winning functionality and industry-specific enhancements that come from serving a vertical customer base.

Please review the points that follow for an overview and benefits of Powertrak Core when added to Dynamic CRM 3.0.

PhoneBook single screen, multi-table query with type to load search



E-mail blast to templates, mass update of records and activity generation to selected records in any list



Pipeline Manager allows in-line editing of opportunity data saving time for the end user

Key Features

Browser-based Email Blaster with Templates	<ul style="list-style-type: none">• Powertrak PhoneBook enhances the e-mail functionality of Dynamics CRM 3.0• In PhoneBook you can build a list and blast emails to selected targets using Dynamics CRM 3.0 templates, Powertrak templates, HTML or Microsoft Word• Supports rich HTML format and savable public and personal lists
In-line De-duplication Manager (PT V8)	<ul style="list-style-type: none">• Powertrak supports definable multiple match keys, operates in real time, and extends to objects outside of name/address records
Pipeline Manager	<ul style="list-style-type: none">• Pipeline Manager saves time by allowing in-line edit functionality thus eliminating the need to open each record.• Pipeline Manager is completely configurable with no coding• You can build similar editable grids against virtually any data items
Mass Update	<ul style="list-style-type: none">• Powertrak supports configuration of unlimited, definable mass updates across any table and data item using Application Builder
Enterprise Views	<ul style="list-style-type: none">• Powertrak Enterprise Views enhance the activity view functionality of Dynamics CRM 3.0.• CRM 3.0 activity views consolidate activities of direct contacts at the account level• With Powertrak Enterprise views, CRM users working with accounts that have sub accounts, can view consolidated activities, contacts, opportunities and channel/partner opportunities for all sub accounts associated with the enterprise
PhoneBook	<ul style="list-style-type: none">• PhoneBook provides single screen advanced search across multiple tables and linked parent-child views. For example, finding customers who are interested in one or more products within a given date range is built-in• PhoneBook is a type to load search tool, saving end-user's time, particularly in service and call center environments.• PhoneBook and all advanced Powertrak searches execute as you type eliminating keyboard to mouse movement.• PhoneBook includes advanced interaction functions to enable email blasts from templates, record activities, and add selected records to queues.
PowerRelate threaded Multi-Channel activity discussions with Process Tracking	<ul style="list-style-type: none">• The PowerRelate capabilities in CRM 3.0 activities track all responses in a visually intuitive navigation tree.• With Powertrak, all CRM activities can be cross-associated to both a business partner and the prospect/customer.• Process definitions tag and group Activities by business process, activity type and next action, which are logical tiered combo boxes.
PowerRelate – Enhanced Relationship tracking	<ul style="list-style-type: none">• PowerRelate capabilities present many-to-many, hierarchically branched trees of relationships between accounts, contacts, activities and opportunities.• PowerRelate saves time by eliminating the need to open individual forms by displaying call notes, account and contact information, at any tree level, in a split-screen view. Furthermore PowerRelate allows for simple, end-user configuration.
Dashboards for Real-time Analytics	<ul style="list-style-type: none">• Powertrak includes a configurable dashboard, with built in analyzers for all department functions such as marketing, service, portals, channel, pipeline management and call center operations.

Powertrak is designed to meet the needs of specialized industries and Microsoft centric mid-size organizations.
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