

# AvePoint Sales Management Solution for Microsoft Dynamics CRM

## Step 1



Jeff, a sales manager, receives a call from a customer regarding a recent proposal while offsite.

## Step 2



Jeff logs into AvePoint Timeline from his mobile device to log the activity under the associated opportunity, and sets a task to schedule a follow-up meeting.



From Timeline, Jeff can also refresh his knowledge of the customer by browsing activity history for the account.

## Step 3



Jeff then receives a call from his sales executive, requesting that Jeff provides an updated team forecast for the coming quarter.

## Step 4



With AvePoint Pipeline, Jeff locates the customer opportunity and updates the expected close date. Now, Jeff can view his team's pipeline and update his sales executive.

## Step 5



Jeff views "My Team's Opportunities" and adjusts the forecasting box to get the latest weighted and actual forecast for the coming quarter.



With just a few clicks, Jeff can also view a summary report of his team's opportunities to ensure they are on target for the coming year.

## End Result



### End-user Productivity

Quickly view, log, and manage CRM information on the go.



### Optimize Account Management

Improve activity tracking, insight, and opportunity management.



### Enhanced Insight

Enhance management insight and reporting.