

**Benefits:**

- Integrates Microsoft Outlook with Navision Attain CRM.
- Maintain Contacts in Outlook or Navision Attain.
- Create Appointments and To-dos in One Place.
- Have all your opportunities with you in Outlook
- Save Emails from Outlook in Attain, or Send Emails Directly from Attain.
- Flexibility to Develop

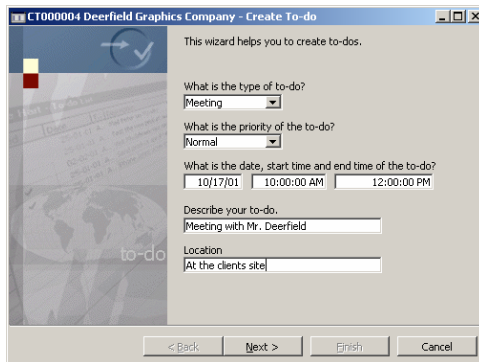
# Outlook Integration Suite for Navision Attain®

Version 2.10

This product suite integrates Navision Attain® Customer Relationship Management (CRM) with Microsoft Outlook®. Data is automatically retrieved and sent from Attain to Outlook, and visa versa. In other words, this is a true two-way integration. Changes can be made in either application and reflected in the other.

The suite integrates the following:

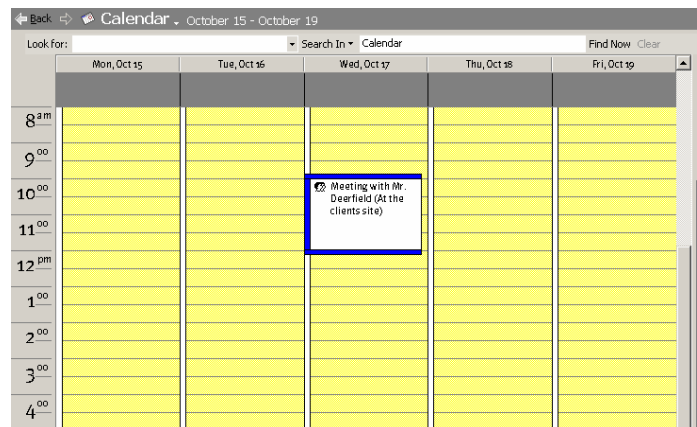
- Outlook Emails with Attain Interactions
- Outlook Calendar with Attain To-dos (Meetings)
- Outlook Tasks with Attain To-dos
- Outlook Contacts with Attain Contacts
- Outlook Tasks with Attain Opportunities



## Here's How it Works

For example, a salesperson enters a to-do in a contact card in Attain. Information like the date, time, and duration of the to-do is entered into a wizard. The salesperson also enters his or her personal identifier. After finalizing the to-do wizard in Attain, the appointment is automatically entered into both Attain and the relevant Outlook calendar.

If the to-do is a Meeting, it will go into the Outlook calendar, as was just described. If the to-do is a Phone Call it will go into Outlook Tasks. All information relating to the to-do (Meeting or Phone Call) is pushed into Outlook - the salesperson now need only go to one place to find the required information.



## Truly Two-Way

Continuing with the example: if the meeting is rescheduled in Outlook (dragged, etc.) it will automatically be changed in Attain. Similarly, if it is changed in Attain, the resulting change will be reflected in Outlook. Either place will have the correct information!



# Requirements

The Outlook Integration Suite has the following requirements:

- Navision Attain version 3.00 or later
- Microsoft Outlook version 2000 or later

The following Navision Attain granules are required:

- Contact Management
- Task Management
- Interaction/Document Management
- Opportunity Management (only if used)

No technical granules are required.

A Navision Financials version is also available.

---

**SIMCREST, INC.**  
12222 Merit Dr, Suite 1850  
Dallas, TX 75251  
Phone: 972-770-4650 · Fax: 972-770-4655 · [www.simcrest.com](http://www.simcrest.com)

**NAVISION**<sup>®</sup>  
*SolutionCenter*