CRM WITH SAP® BUSINESS ONE
WIN NEW CUSTOMERS AND MAINTAIN EXISTING RELATIONSHIPS

Acquiring new customers is important for business success, but maximizing customer relationships is just as crucial. The SAP® Business One application provides the tools to turn prospects into customers, grow customer sales and profitability, and increase customer satisfaction.

Use the customer relationship management (CRM) tools in the SAP® Business One application to close sales faster and better serve your customers. These tools let you automate processes and efficiently manage activities throughout the entire sales cycle, including initial contact, proposal, closing of sales, and after-sales service and support. Tightly integrated features across marketing, sales, and service provide a 360-degree view of your prospects and customers so you can better understand and meet their needs.

With the sales and opportunity management tools, you can create quotes, enter orders, perform real-time availability checks across all your warehouses, and process deliveries. Record new sales opportunities with relevant information such as lead source, potential competition, deal size, and sales stage. You can synchronize your tasks, contacts, and opportunities between SAP Business One and Microsoft Outlook while gaining instant access to snapshots of customer data from your e-mail.

Help guarantee ongoing customer satisfaction with quick response to service and support calls. The service management tools in SAP Business One let you optimize the potential of your service operations, service contract management, and customer support.

The powerful reporting functionality of SAP Business One, including the Crystal Reports® software, lets you analyze sales opportunities by territory, customer, or product; conduct sales forecasts; and assess sales and service departments' performance.

Opportunities and Sales Management

With SAP Business One, you can efficiently manage your tasks and information throughout different stages in the sales cycle. Schedule and receive reminders for phone calls, meetings, and assigned tasks. You can record any activity along with detailed notes, and activities entered into your calendar in SAP Business One can be synchronized with your schedule in Microsoft Outlook. Also, all activities can be linked to customers, vendors, and leads. For example, you can link activities to a sales lead and later drill down into these activities from the lead screen with one click.

The sales opportunities functionality in SAP Business One lets you manage the entire sales process as it progresses through sales stages, as well as forecast revenue potential and analyze sales outcomes. For a complete sales framework, SAP Business One allows you to enter new opportunities with information about potential sales volumes, customers, specific competitors or partners, expected closing dates, and sales stages. The application immediately calculates projected gross profit and revenue. As the opportunity progresses through the various sales stages and new data is entered, the expected profit and revenue calculations are dynamically updated to accurately reflect the current situation.
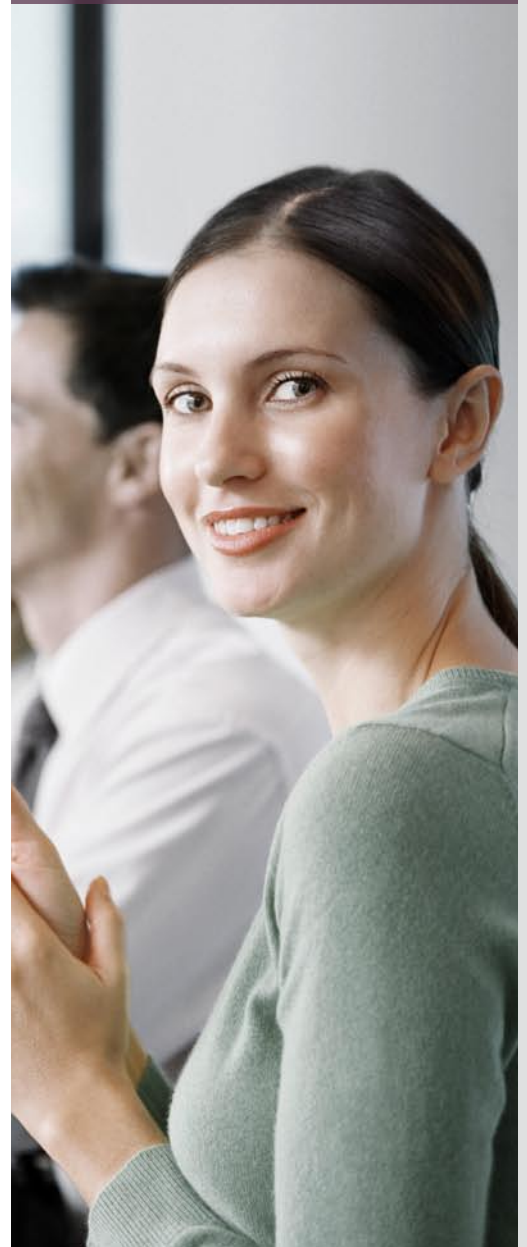
Customer Relationship Management in SAP® Business One		
Opportunities and Sales	**Customer Contacts**	**Service**
Track and manage opportunities throughout the sales cycle	Manage lead and customer data in a simple user interface	Administer warranty and service information
Create instant price quotes, convert them to orders, and perform real-time product availability checks	Access customer balances, credit lines, opportunities, and open orders from a single screen	Respond to customer service requests from a central location
Generate sales documents more easily with a variety of templates	View and synchronize contacts with Microsoft Outlook	Search for solutions to customer problems in a solutions knowledge database
Create dashboards and interactive reports for forecasting and sales analysis	Automatically transfer data from master records to relevant transactions	Monitor service levels with alerts and reports

Figure 1: How SAP Business One Simplifies Customer Relationship Management

Once a sales opportunity is won, you can create a sales order directly without having to reenter data. SAP Business One integration features allow you to perform instant online availability checks for ordered products. In addition, accounting data and inventory levels are immediately updated without the need for user interaction. The application provides a variety of templates for business documents, such as quotations, order confirmations, and billing materials, so you can create business documents and send them to your prospects and customers using standard PDF or other commonly used formats.

Numerous reporting functions in SAP Business One allow you to monitor sales activities and analyze sales opportunities based on customer, sales stage, expected volume, closing probability, closing date, and sales employee.

Customer Contact Management

SAP Business One makes it easier to manage master data for sales leads and customers. A dedicated master

record feature is used to create and maintain data in user-friendly screens – such as name, address, phone and fax numbers, e-mail addresses, contact persons, and tax information. In addition, you can manage important payment data such as terms, credit limits, and special discounts, as well as bank and credit card information. Data stored in a customer master record is automatically transferred into the relevant transactions, such as sales quotations, orders, or deliveries. You are notified if credit limits have been exceeded or if a customer is "on hold"

due to delivery or payment issues. A dashboard in the customer master record gives you an overview of the account balance, outstanding orders, and deliveries, as well as opportunities in the pipeline. Also, because SAP Business One provides visibility into the complete purchase history, it enables you to expose trends and anticipate customers' needs based on historical customer information. Therefore, you can offer the right products and services and effectively align your production activities and inventory with your sales.
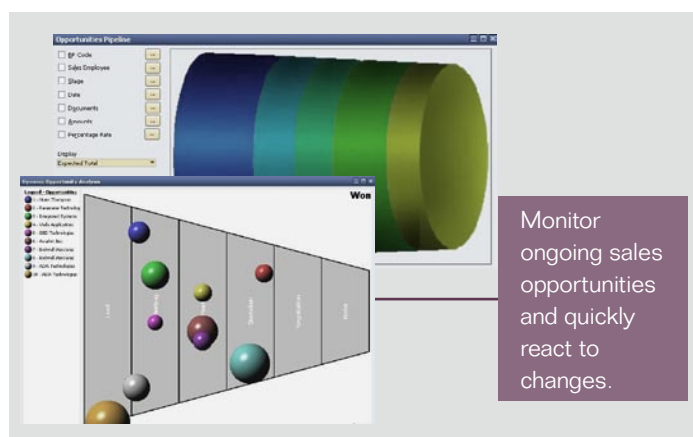

Figure 2: Sales Pipeline Monitor

Monitor ongoing sales opportunities and quickly react to changes.

Service Management

The service management functionality in SAP Business One allows you to efficiently administer customer warranty and service contracts and manage service calls. You can create service contracts based on warranted products you are selling or create them separately for support services rendered for third-party products. Integrated functionality of the software automatically generates a service contract for rele-

"SAP Business One makes every-day customer service processes straightforward – processes that are very complicated with other software."

Sam Sinai, President, Deco Lighting

vant products upon creation of a delivery or an accounts receivable invoice. The service contracts contain information about items covered under the agreement, such as service, contact, response time, and coverage time, as well as specific item details and information regarding relevant expenses. And with a variety of predefined templates, you can employ an automated and standardized approach to crafting all types of contracts.

SAP Business One lets you document all customer service calls. A service call record includes information about the customer, the service item, the issue reported, and activities performed in response to the call. The application also maintains a solutions knowledge base where frequently requested information and solutions to common issues are recorded. This knowledge base provides service representatives with possible solutions to reported problems, allowing them to respond more quickly and more effectively to customer calls.

The reporting features of SAP Business One give you a real-time overview of your service department, letting you analyze call volumes, durations, and response times. The service call monitor records limits for call durations and volumes and creates alerts when preset limits are exceeded, helping to guarantee timely response or resolution times.

Microsoft Outlook Integration

Using Microsoft Outlook synchronization with SAP Business One, you can access customer and sales information via Microsoft Outlook when you are either online or offline. You can synchronize calendars to activities and import customer data from SAP Business One into your Microsoft Outlook contacts list. The quotation function enables you to display and edit existing quotations directly in Microsoft Outlook. You can also create new quotations in Microsoft Outlook, store them in SAP Business One, and send

them as an e-mail to your prospect or customer. E-mails sent and received in Microsoft Outlook can then be saved and retrieved as activities in SAP Business One.

Sales Reports and Analysis

Reporting features in SAP Business One enable you to create powerful sales reports to help manage sales opportunities and perform forecasting and analysis. You can create insightful dashboards showing overviews of top customers and deals, year-to-date revenue, open orders, and open receivables. Taking advantage of a large number of standard report templates, you can also create detailed sales reports, such as opportunities forecasting, pipeline tracking, win and loss analysis, and sales order analysis.

For More Information

To learn more about how SAP Business One can help you grow your business and effectively service your customers, call your SAP representative today or visit www.sap.com/sme/solutions /businessone.

Summary

Acquiring new customers is important for business success, but maintaining customer relationships is just as crucial. The SAP® Business One application provides the tools to turn prospects into customers, grow customer profitability and sales, and increase customer satisfaction. Discover how SAP Business One helps your business optimize and streamline the entire sales process – from tracking leads to managing sales orders and customer data to administering after-sales support.

Business Challenges

- Convert more opportunities to sales
- Manage all sales-related contacts
- Maintain ongoing customer satisfaction
- Access specific sales data and reports when you need them

Key Features

- **Sales and opportunity management** – Track sales opportunities and activities from first contact to closing the sale
- **Customer contacts** – Store all critical customer data in one place, with dashboard overviews of all relevant information
- **Service management** – Efficiently manage warranty and service contracts; enter and respond to service calls quickly
- **Integration with Microsoft Outlook** – Manage and maintain customer contacts with full Microsoft Outlook synchronization
- **Reporting and analysis** – Create detailed reports on every aspect of the sales process, including sales forecasting and pipeline tracking, using time-saving report templates

Business Benefits

- **Higher sales revenue** by providing the right products and services, armed with a 360-degree view of your customers and their needs
- **Faster, more profitable sales conversion** with effective sales and opportunity management
- **Increased customer satisfaction** due to faster response to service calls and better problem-resolving capabilities
- **Improved decision making** based on timely, accurate data on all aspects of the sales process

For More Information

Visit us online at www.sap.com/sme/solutions/businessone.