CUSTOMER RELATIONSHIP MANAGEMENT WITH SAP® BUSINESS ONE

Win New Customers and Maintain Existing Relationships with Customer Relationship Management Tools

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 and opportunities to managing sales orders and customer data to administering after-sales support.

Use the powerful sales management tools of the SAP® Business One application to create quotes, enter customer orders, and perform real-time availability checks across all your warehouses. Record new sales opportunities with relevant information, such as lead source, potential competition, and closing date. Track relevant activities from the first contact to the successful close of the transaction. The integration of SAP Business One with Microsoft Outlook allows you to synchronize contacts and opportunities, while gaining instant access to customer data from your e-mail using snapshot templates. The print layout designer tool in SAP Business One provides templates for any document you may need during the sales process, such as quotations, order confirmations, and billing documents.

Ongoing customer satisfaction is guaranteed with quick response to service and support calls. The service management tools in SAP Business One allow you to optimize the potential of your service operations, service contract management, and customer support. Enter service calls quickly and efficiently and use the SAP Business One solutions knowledge base to instantly find resolutions to customer support requests. Measure and track the usage rate and response time of your service department with tools such as the service monitor, which gives you a real-time overview of the volume and duration of incoming service calls.

The powerful reporting functionality of SAP Business One, including the XL Reporter tool, lets you analyze sales opportunities by territory, customer, or product, and conduct sales forecasts using any desired time period. Numerous standard sales reports are available to provide a comprehensive picture of the success of your sales organization.

Customer Relationship Management in SAP® Business One		
Opportunities and Sales	**Business Partners**	**Service**
Convert prospects into customers by tracking activities and using workflow management	Manage lead and customer data in simple user interface	Administer warranty and service information with contracts and customer equipment cards
Create instant price quotes and perform product availability checks online	Access customer balances, credit lines, and open orders from master data screen	Respond to customer service requests from central location
Generate sales documents with print layout designer	View contacts with Microsoft Outlook	Search for solutions to customer problems in online knowledge database
Create dashboards with XL Reporter tool for forecasting and sales analysis	Use Drag&Relate™ feature to generate business partner reports	Monitor service levels with alerts and reports

Figure 1: Customer Relationship Management Features of SAP Business One

Opportunities and Sales Management

No matter which sales channel you use or how complex the prospecting process, you can record and track sales opportunities in SAP Business One.

With SAP Business One, you can efficiently manage your tasks and information throughout 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.

All activities can be linked to business partners and documents. For example, you can link activities to a sales lead and later drill down into these activities from the lead screen. Reporting functions in SAP Business One give you an overview of both your ongoing and future activities, as well as those of your sales employees. The sales opportunities module in SAP Business One lets you manage the entire sales process as it progresses through different, custom-defined sales stages. This module tracks sales opportunities and sales activities, analyzes their outcome, and forecasts revenue potential.

For a complete sales framework, SAP Business One allows you to define sales stages, partners, competitors, and relationships that apply to sales opportunities. Enter new opportunities in SAP Business One with information about potential sales volumes, customers, specific competitors or partners, expected closing dates, and sales stages. SAP Business One enables you to classify sales opportunities according to custom-defined criteria for accurate processing. The application immediately calculates a 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 continuously updated to accurately reflect the current situation.

Once a sales opportunity is won, you can directly create a sales order 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. Using the SAP print layout designer, you can define templates for all your sales documents. Templates can automatically be applied when you generate outbound documents, such as quotations, order confirmations, and change confirmations.

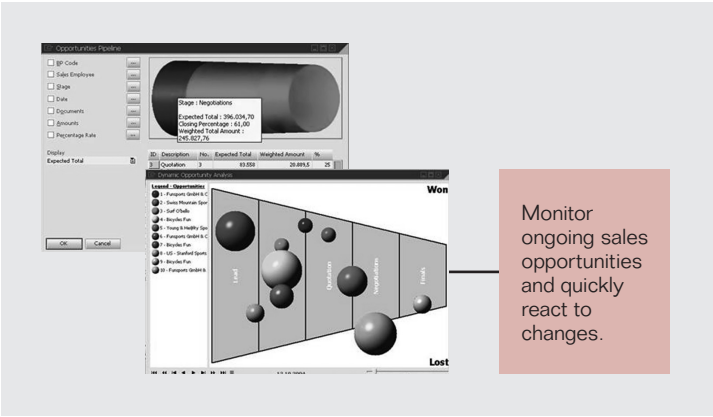Monitor ongoing sales opportunities and quickly react to changes.

Figure 2: Sales Pipeline Monitor

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

Business Partner Management

SAP Business One makes it easy to manage master data for sales leads and customers. A dedicated business partner master module is used to create and maintain lead and customer data in user-friendly screens.

SAP Business One stores general business partner data, 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 business partner 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. Data can be viewed in graphical format – for example, in a sales analysis report showing revenue and profit for a customer.

Service

The service management module in SAP Business One allows you to efficiently administer customer warranty and service contracts and manage service calls. Service contracts can be based on warranted products you are selling but can also be created separately for support services rendered for a third-party product. SAP Business One integration functionality automatically generates a service contract for relevant products upon creation of a delivery or an AR invoice. The service contract is based on a predefined template and contains information about items covered under the agreement, service, and response times, as well as other warranty information.

Serial number management and autocreation of customer equipment cards can be activated. A customer equipment card is issued upon delivery or invoice posting of a serial number item and contains information about the item, customer, and service contracts. It also provides direct access to sales data, service calls, and other recorded transactions.

SAP Business One enables you to 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. SAP Business One maintains a solutions knowledge base where known issues are stored. This knowledge base provides service representatives with possible solutions to reported problems, allowing them to respond faster 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, call durations, and response times. The service call monitor records limits for call durations and volumes and creates alerts when those limits are exceeded.

Microsoft Outlook Integration

The Microsoft Outlook add-on for SAP Business One allows you to synchronize calendars and tasks and lets you import customer data from SAP Business One into your Microsoft Outlook contacts list. The quotation function included in this add-on enables you to display and edit existing quotations directly in Microsoft Outlook. You can 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 be saved and retrieved as activities in SAP Business One. Using the SAP "snapshot" feature, you can define a set of data about a customer or lead and export it into Microsoft Excel. That data can then be associated with a record in your Microsoft Outlook contact list.

To learn more about how SAP Business One can empower your sales and service organization to grow your business and effectively service your customers, call your SAP representative today or visit us on the Web at www.sap.com/smallbusiness.

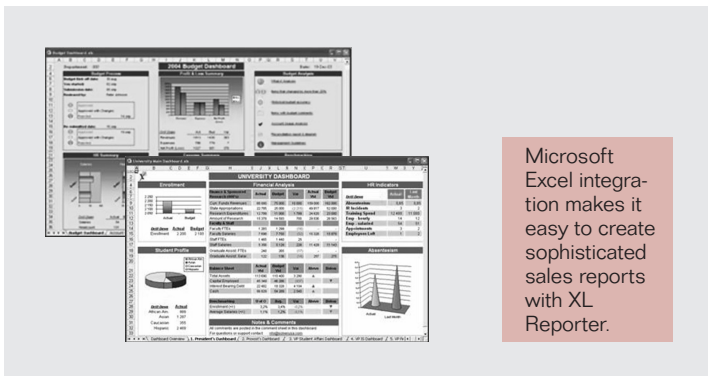Microsoft Excel integration makes it easy to create sophisticated sales reports with XL Reporter.

Figure 3: XL Reporter Sales Report Samples

Sales Reports and Analysis with XL Reporter

XL Reporter in SAP Business One enables you to create powerful sales reports using Microsoft Excel templates. With the report designer and the report composer, you can create dashboards showing top-customer and deal overviews, year-to-date revenue, open orders, and open receivables. The same tools let you create detailed sales reports, such as opportunities forecasting, pipeline tracking, win/loss analysis, and sales order analysis. SAP provides a large number of templates to give you a head start on your sales reporting. The report organizer in SAP Business One helps you manage and execute your reports and allows for easy distribution to sales employees and business partners.

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