CUSTOMER RELATIONSHIP MANAGEMENT WITH SAP® BUSINESS ONE
WIN NEW CUSTOMERS AND MAINTAIN EXISTING RELATIONSHIPS

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.

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. 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.

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 XL Reporter tool, lets you analyze sales opportunities by territory, customer, or product and conduct sales forecasts using any desired time period.

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

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

and later drill down into these activities from the lead screen. The sales opportunities functionality in SAP Business One lets you manage the entire sales process as it progresses through different, custom-defined sales stages. This function 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. 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 inven-

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tory levels are immediately updated without the need for user interaction. The print layout designer (PLD) in SAP Business One provides templates for business documents such as quotations, order confirmations, and billing materials. You can use the PLD to create business documents to send to prospects and customers using standard PDF format.

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 feature 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.
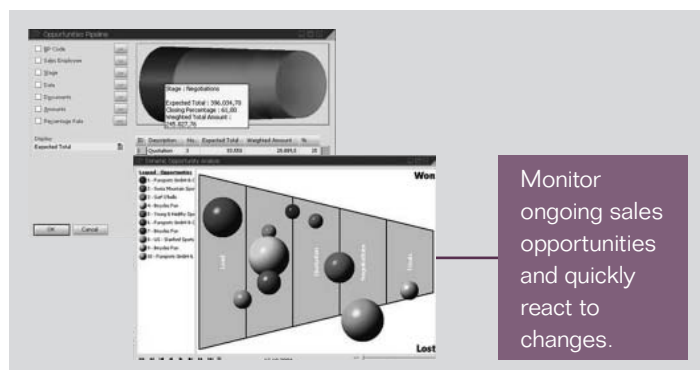
A dashboard in the customer master record gives you an overview of the account balance, outstanding orders, and deliveries, as well as opportunities in the pipeline. Data can be viewed in graphical format – for example, in a sales analysis report showing revenue and profit for a customer.

Figure 2: Sales Pipeline Monitor

Monitor ongoing sales opportunities and quickly react to changes.

Service

The service management functionality 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, such as service and response times, as well as other warranty information.

Serial number management and auto-creation 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, 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

Microsoft Outlook synchronization with SAP Business One allows you to access customer and sales information via Microsoft Outlook when you are either online and offline. You can synchronize calendars and tasks 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 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 "snapshot" feature available in SAP Business One, 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.

The service management tools in SAP Business One help you optimize your service operations and customer support.

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.

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/smallbusiness.

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 and opportunities to managing sales orders and customer data to administering aftersales support.

Challenges

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

Supported Business Processes and Software Functions

- **Powerful sales management capabilities** – Track sales opportunities and activities from first contact to closing the sale
- **Dedicated business partner master feature** – Store all critical customer and partner data in one easy place, with dashboard overviews of all relevant information
- **Optimized 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
- **Sales reports 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

- **More effective sales management**, converting more opportunities into sales and prospects into customers
- **Increased customer satisfaction** due to faster response to calls and better problem-resolving capabilities
- **Improved decision making** based on timely, accurate data on all aspects of the sales process

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