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.
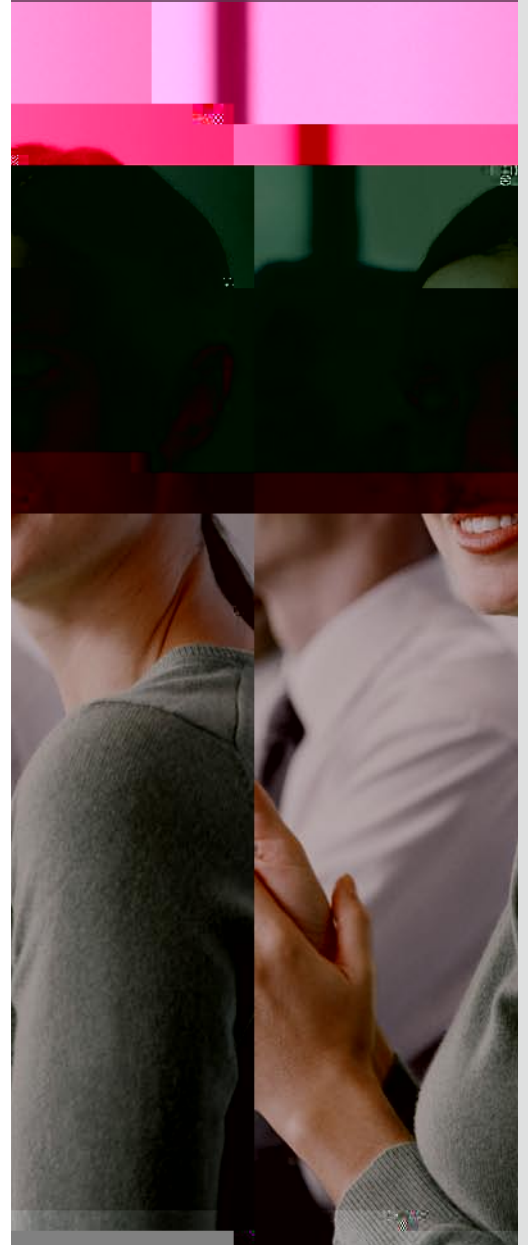
Use the customer relationship management (CRM) tools in the SAP® Business One application to close sales faster and better serve your customers. These tools let you automate processes and efficiently manage activities throughout the entire sales cycle, including initial contact, proposal, closing of 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 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

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.

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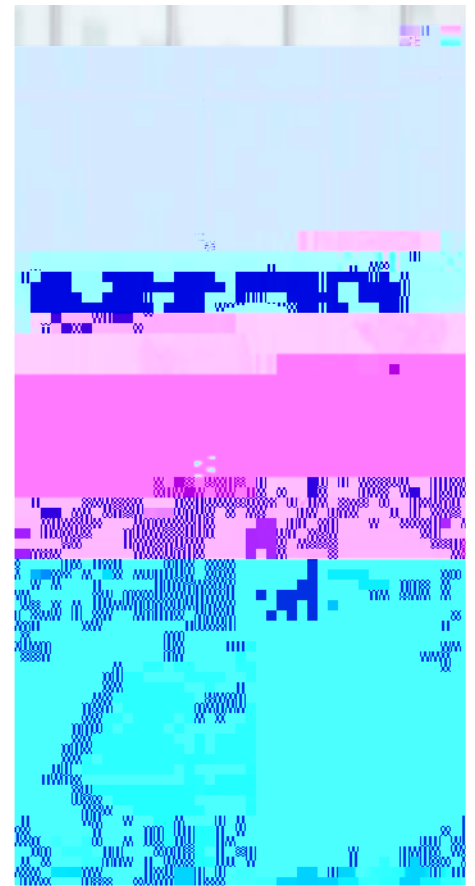
them as an e-mail to your prospect or customer. E-mails sent and received in Microsoft Outlook can then be saved and retrieved as activities in SAP Business One.

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.

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