Managing Customer Relationships with SAP Business One®

SAP Solution Brief
SAP Solutions for Small Businesses and
Midsize Companies
SAP Business One

Objectives

Solution

Benefits

Quick Facts

Managing Customer Relationships with SAP Business One®

SAP

The Best-Run Businesses Run SAP®

Win new customers and forge better relationships

Acquiring new customers is important for business success, but maximizing customer loyalty is just as crucial. With integrated customer relationship management (CRM) software, the SAP Business One® application helps you turn prospects into customers, grow sales and profitability, and achieve high levels of customer satisfaction.

CRM tools are essential for engaging new prospects and driving opportunities to make sales. The tools are just as critical for managing service operations, service contracts, and customer support. Beyond optimizing sales, marketing, and support processes, you can use them to analyze customers and prospects, understand their needs, and better meet those needs.

By integrating your sales, marketing, and support processes with the rest of your business, the tools let you deliver orders as promised, correctly invoice your customers, and accurately forecast your revenue. And with mobile access, your team can tap into information they need from wherever they may be.

The SAP Business One application and its version powered by SAP HANA® provide a reliable, integrated CRM solution to help optimize your customer interactions and support processes across your entire business (see table). The software is available on premise or in the cloud – the choice is yours.

Win new customers and forge better relationships

CUSTOMER RELATIONSHIP MANAGEMENT FEATURES OF SAP BUSINESS ONE®

Campaigns, Opportunities, and Sales	Customer Contacts	Service
Create, maintain, execute, and analyze marketing campaigns	Manage lead and customer data using a simple user interface	Administer warranty and service information
Track and manage sales opportunities throughout the sales cycle; generate sales documents using a variety of templates	Access customer balances, credit lines, opportunities, and open orders from a single screen	Perform purchase planning using the material requirements planning wizard
Create instant price quotes, convert them to orders, and perform real-time product availability checks	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	Transfer data from master records to relevant transactions automatically	Monitor service levels with alerts and reports

Manage marketing campaigns

Manage marketing campaigns

Manage opportunities and sales activities

Go straight from a closed deal to the sales order

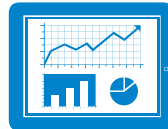Gain insight from customer master data

Manage services

Integrate Microsoft Outlook and mobile technology

Perform efficient reporting and analytics

SAP Business One helps you run marketing campaigns with greater ease from start to finish, including analyzing the results. To plan your campaign, you can use the application to segment your contacts into target groups, for example, prospects by geography or industry and current customers by purchased product. An easy-to-use wizard then guides you through the steps to create and execute your marketing campaign. These include importing contact lists from Microsoft Excel and executing the campaign through e-mail and other methods. With integrated reports, you can analyze your campaign performance, including response rates and overall success of the campaign.

With help from the software, you can readily convert a qualified lead from the campaign into a sales opportunity and follow up with a sales quotation. Again, integrated reports let you optimize your campaign follow-up process. For example, you can see the various opportunities created and sales quotes sent as a result of the campaign.

Create, execute, and analyze marketing campaigns with ease using SAP Business One.

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With SAP Business One, you can efficiently manage your activities through different stages in the sales cycle. Schedule and receive reminders for phone calls, meetings, and assigned tasks. Record any activity along with detailed notes and link it to customers, vendors, and leads from your desktop or mobile device. Link activities to a lead, and drill down into the details with one click. Synchronize your activities in SAP Business One with your personal schedule in Microsoft Outlook to manage your tasks with clarity.

The sales opportunity functionality lets you manage the entire sales process, as well as forecast revenue potential, and analyze sales outcomes. When you enter new opportunities with information about potential sales volumes, customers, specific competitors, expected closing dates, and sales stages, the application immediately calculates projected gross profit and revenue. As the opportunity progresses through sales stages and new data is entered, the expected profit and revenue calculations are updated dynamically.

Integrating Microsoft Outlook with the CRM functionality of SAP Business One makes it easy to manage your busy day.

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Once a sales opportunity has been won, you can create a sales order from it directly without having to reenter data. You can see the movement of goods into and out of your business and check the availability of ordered products in real time, because the software updates accounting data and inventory levels automatically. When necessary, the version of the application powered by SAP HANA provides the flexibility to reschedule orders dynamically. This enables you to deliver goods to your customers as promised and maintain high customer satisfaction.

The application provides a variety of templates for business documents, such as quotations, order confirmations, and billings. This means you can create business documents and send them to your prospects and customers using standard PDF or other commonly used formats.

SAP Business One provides tight integration between CRM and inventory so you deliver what you promise when it's promised.

Gain insight from customer master data

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SAP Business One eases the management of master data for sales leads and customers.

A dedicated customer master record feature is used to create and maintain data in user-friendly screens or from a mobile device – such as name, address, phone and fax numbers, e-mail addresses, contacts, and tax informa-tion. 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 to 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 for the customer master record gives you an overview of account balances, outstanding orders, and deliveries, as well as opportunities in the pipeline. Also, because SAP Business One provides visibility into a customer's complete purchase history and open purchase orders, you can expose trends and anticipate needs based on historical infor-mation. That means you can offer both the right products and services to customers and align your production activities and inventory with sales.

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The service management functionality in SAP Business One simplifies the management of customer warranties, service contracts, and service calls. You can create service contracts based on warrantied products you are selling or create them separately for support services rendered for third-party products. The service contract contains information about items covered under the agreement, such as service, contact, and response time. With a variety of predefined templates, you can use an automated and standardized approach to crafting all types of contracts.

SAP Business One helps 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. Service reps can use mobile devices to view service contracts and manage the service call lifecycle – from viewing and picking up their service calls to closing a service call and tracking solution details.

The application also maintains a solutions knowledge base, where frequently requested information and solutions to common issues are recorded. This knowledge base helps service representatives respond more quickly and effectively to customer calls and reported problems.

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By taking advantage of the synchronization between Microsoft Outlook and SAP Business One, you can access customer and sales information through Microsoft Outlook even when you're offline. This also lets you synchronize calendars and activities and import customer data from SAP Business One into your Microsoft Outlook contacts list.

Another advantage is that you can sync e-mails and meetings from Microsoft Outlook to SAP Business One. For example, if SAP Business One sees an e-mail in Microsoft Outlook from George at ABC Company, it will record it in the SAP Business One application as an activity.

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 e-mails to your prospect or customer. E-mails sent and received in Microsoft Outlook can be saved and retrieved as activities in SAP Business One. And, when using the SAP Business One mobile app, you can synchronize this information on your device.

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The reporting functionality of SAP Business One, including SAP® Crystal Reports® software, lets you create powerful sales reports and dashboards to stay on top of sales opportunities, conduct sales forecasts, and assess sales and service performance.

You can monitor sales across multiple dimensions, such as customer and sales stage, and create dashboards showing the information you need to see most in a single location. With report templates, you can create detailed sales reports, such as pipeline tracking.

A real-time overview of your service department lets you analyze call volumes, durations, and response times. The service call monitor creates alerts when preset limits for call duration or volumes are exceeded, helping to guarantee timely response and resolution.

When powered by the SAP HANA platform, SAP Business One can take your business reporting to the next level, enabling employees to create and run ad hoc reports without requiring assistance from a consultant or IT expert. Visual and contextual reports can be embedded in familiar screens of the SAP Business One application. For example, when a customer's name is entered into a sales order screen, a side panel on the screen can open showing the products most often purchased by that customer. This enables your reps to make informed recommendations at the point of sale.

Profit from integrated CRM functionality

Profit from integrated CRM functionality

SAP Business One includes CRM software that streamlines your sales, marketing, and support processes and integrates them with finance and inventory activities. The resulting comprehensive view of your customers and prospects helps you understand their needs and better meet them.

The application helps you create effective marketing campaigns. You can target your prospects and customers to identify highly qualified opportunities. You can increase revenue by managing your activities and opportunities through different stages in the sales cycle. As soon as the opportunity data is entered, the application gives you visibility into projected gross profit and revenue from a deal, so you can make better business decisions. Postsale, the solution helps you increase customer satisfaction by responding faster to service calls, increasing the efficiency of customer warranty and service contract administration, and resolving problems better. Rich analytics functionality supports improved decision making based on timely, accurate data on all aspects of the campaign, sales, and service processes.

Optimize and integrate your CRM processes to get a 360-degree view of your customers, so you can understand and meet their needs better.

Summary

Acquiring new customers is crucial for business success, but maintaining customer relationships is just as important. The SAP Business One® application provides the tools to turn prospects into customers and grow customer profitability and customer satisfaction. Discover how SAP Business One – whether as an on-premise or cloud deployment – can help your business streamline the sales process, from tracking leads to administering aftersales support – from your desktop, tablet, or mobile device.

Objectives

- Execute effective marketing campaigns
- Convert more opportunities to sales
- Manage sales-related contacts
- Boost customer satisfaction
- Access specific sales data and reports when and where you need the

Solution

- Creation and execution of marketing campaigns
- Tracking of sales opportunities and activities from first contact to deal close
- Single repository for all critical customer data
- Efficient management of warranty and service contracts
- Synchronization with Microsoft Outlook
- Comprehensive reporting and analytics
- Support for mobile access

Benefits

- Increased sales revenue
- Greater profits from faster sales conversion
- Increased customer satisfaction from faster response to service calls and better problem resolution

Learn more

Contact your SAP partner, or visit us online at www.sap.com/businessone.

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