

# WEB-BASED CUSTOMER RELATIONSHIP MANAGEMENT

## BUILD NEW, LONG-TERM CUSTOMER RELATIONSHIPS VIA THE INTERNET

The SAP® Business One application offers Web-based customer relationship management functionality that lets you instantly access complete sales and customer information over the Internet. This enables you to respond to customer inquiries and sales requests wherever you may be – in the office or on the road.



### Web Access to Real-Time Customer Data and Sales Information

The ability to maintain close customer relationships is fundamental to business growth. Yet in today's competitive environment, customers are demanding more choices and faster turnaround than ever before. To meet these demands and build customer loyalty, small businesses need rapid access to complete, accurate, and up-to-date customer information.

The Web-based customer relationship management (CRM) functionality of the SAP® Business One application allows you to manage all customer records, along with the entire sales process from initial contact to final order. It provides a complete set of tools to record customer contacts, monitor sales opportunities, generate quotes, and process orders over the Internet. As a result, you can easily track leads as they move down the pipeline to become quotes and then sales.

All of your customer information stored in SAP Business One – such as contacts, order history, invoices, and payment records – is available to you via the Web. In addition to being able to manage sales activities, orders, and contacts from any remote location, you can also access customer management functions for prospecting, campaigning, and managing contact lists.

A full customer support system helps you manage customer questions and issues related to your business. You can receive support tickets through your customer-facing Web site and track them through to their resolution; create projects, tasks, and activities to accommodate customer needs; and gather frequently requested information into a solution knowledge base for use by customers and partners, thereby lowering your support staff's workload.

Sales Management	Partner Management and Campaigns	Service and Support
Give remote partners easy access to SAP Business One data.	Get a unique, centralized view of all customer data.	Create and manage support categories.
Use the pipeline graphic to get a quick look at the progression of leads into orders.	Import and manage prospects.	Receive customer issues through a ticketing system.
Note customer interests and competition.	Create promotional e-mail campaigns.	Create a knowledge base with support solutions.

Figure 1: Web-Based Customer Relationship Management Features of the SAP® Business One Application

## Customer Contacts and Transaction History

SAP Business One offers a unique and centralized view of associated customer data. You can connect to your customer management system through any remote Internet connection and access customer information, telephone numbers, appointment reminders, and order histories.

Through its Web-based CRM functionality, SAP Business One allows you to store and manage important campaign contacts through contact lists. You can easily generate these contact lists by automatically importing your current customer lists, or you can populate them with e-mail addresses from third parties. You can also store multiple contact lists for e-mail campaigns, telephone campaigns, and regular mail campaigns online and then access them via the Internet.

Salespeople and partners working in the field can now have access to their vital contact and customer information. With the Web-based interface, they can manage sales activities, generate orders, and record quotes with ease.

Because SAP Business One automatically synchronizes this information, you can assure remote partners that their information is stored in the central database.

## Sales and Promotions

The Web-based CRM functionality in SAP Business One provides a menu designed to help you quickly access your daily activities. Use the *My Focus* drop-down menu to immediately view and manage your appointment calendar. Use the *Sales View* menu to get a fast view of your customer list, pipeline, and activities, as well as numerous sales reports.

With its Web-based campaign management functionality, SAP Business One enables you to keep partners and customers up-to-date on important business information. You can advertise special

promotions; create discount codes and coupons to send out through e-mail or regular mail; keep your contacts up-to-date on new products or services; and send campaigns as HTML-formatted e-mails to distribution lists.

Innovative prospect management allows you to generate lists of potential customers. You can import prospect information from Microsoft Excel spreadsheets and easily manage relevant information, creating prospect reports directly from a Web browser. The pipeline graphic gives a quick view of opportunity progression from a lead to an order. You can track customer interests and record other companies that are competing for your business.

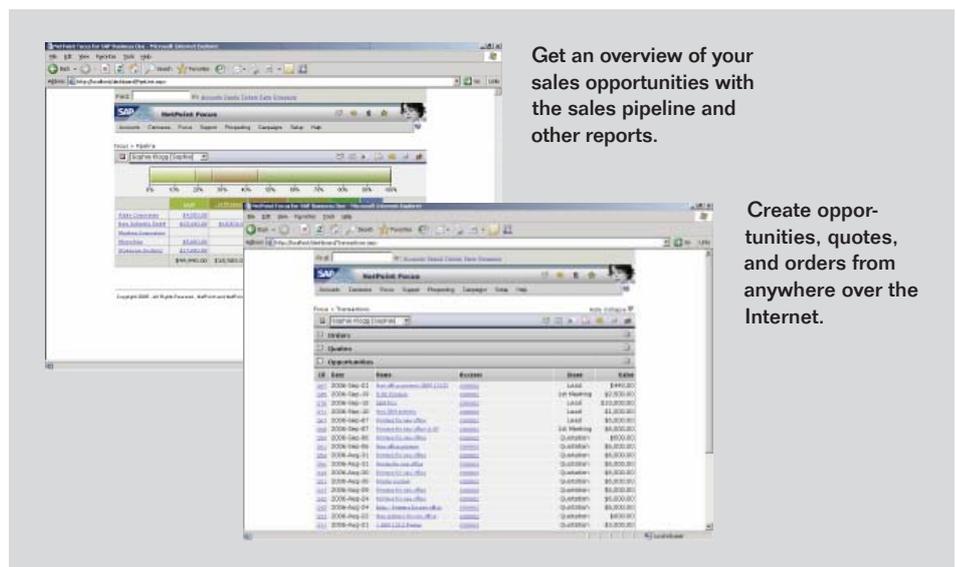
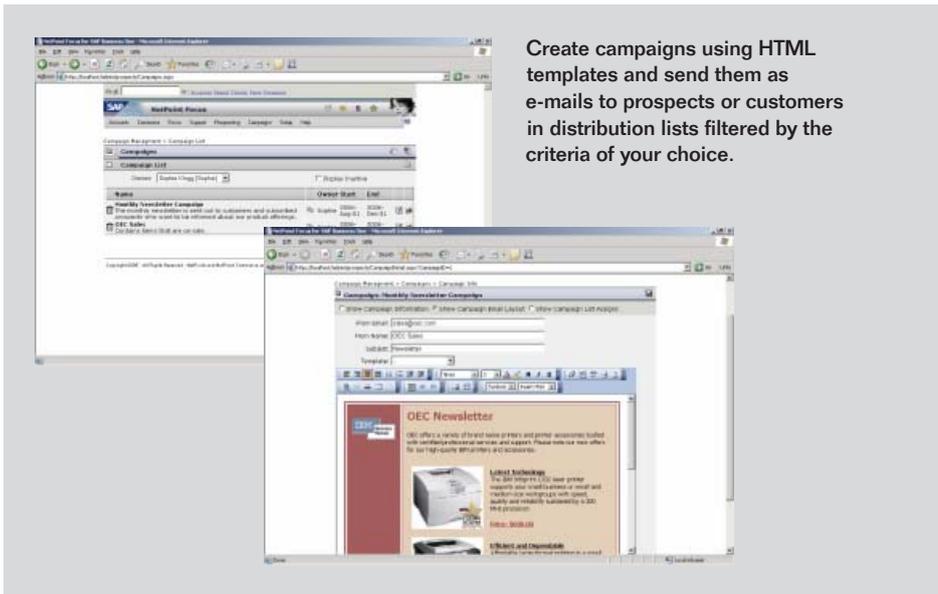


Figure 2: Sales Opportunity Management



Create campaigns using HTML templates and send them as e-mails to prospects or customers in distribution lists filtered by the criteria of your choice.

Figure 3: Campaign Management

## Services and Support

Set up your unique support system to accommodate multiple departments, from technical support to administrative support. Each branch of your support team can have its own request queue, and all support representatives can

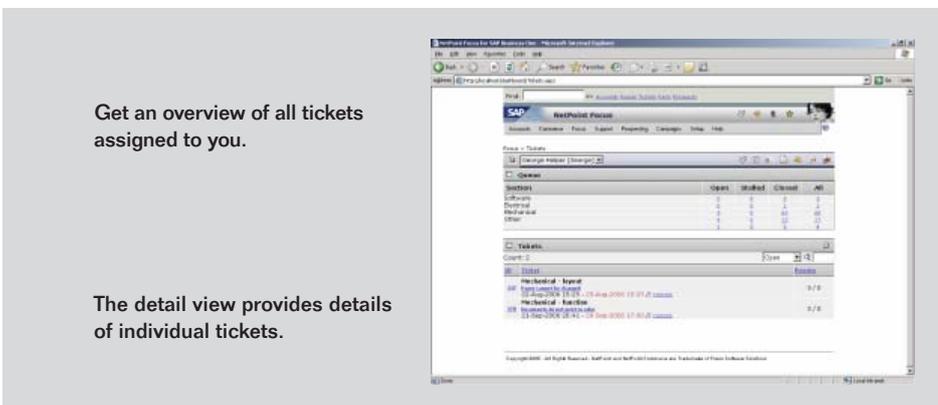
create, open, close, and modify their assigned support tickets.

Through its Web-based CRM functionality, SAP Business One offers a ticketing system that can track support issues all the way through to their resolution. You can receive support requests

through e-mail or via the form you create through the Web-based customer management interface and give your support team the ability to log in to the system locally and remotely. Team members can assign and reassign tickets, create activities associated with the tickets, and contact customers directly through the Web-based interface.

You can generate projects that provide an all-in-one overview of associated tasks, contracts, activities, and solutions. You can create and manage work orders for repairs and services and have SAP Business One synchronize these work orders with service calls. You can also build a searchable online knowledge base documenting issue resolutions for your customers and business partners, thus lightening the burden on your support department.

You can create customer service contracts, which record the types of services that are agreed upon, how much time the assigned support person has to respond to the customer, and the best time to contact the customer regarding the issue. You can also record which items the contract covers.



Get an overview of all tickets assigned to you.

The detail view provides details of individual tickets.

Figure 4: Service Management

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## Summary

Using the Web-based customer relationship management (CRM) functionality of the SAP® Business One application, you can remotely access customer information and sales records on demand. You can also use the powerful Web-based CRM tools to manage sales processes, promotional campaigns, and customer service via the Internet.

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## Challenges

- Difficulty in cultivating long-term customer relationships with limited resources
- Poor or incomplete information about customer contacts, history, and preferences
- Inability to quickly and remotely access customer data while on the road

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## Supported Business Processes and Software Functions

- **Web-based access to complete customer information** – Remotely access and update all customer records, such as contacts, sales records, order history, invoices, and payments
- **Campaign management** – Create effective marketing promotions and campaigns
- **Sales tracking** – Monitor sales opportunities as they progress from leads to orders
- **Post-sales customer service** – Provide online customer self-service to quickly respond to customer needs and issues

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## Business Benefits

- **Faster response to customer needs** – Instantly access customer and sales data from any location over the Web, enabling you to quickly address customer needs
- **Higher customer loyalty** – Provide customers with the valuable product-related information they need on a self-service basis via the Web
- **Increased revenue and sales** – Grow your business by creating effective promotions and campaigns that are aligned with accurate sales tracking and management

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## For More Information

Call your SAP representative or visit us at [www.sap.com/smallbusiness](http://www.sap.com/smallbusiness).

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