



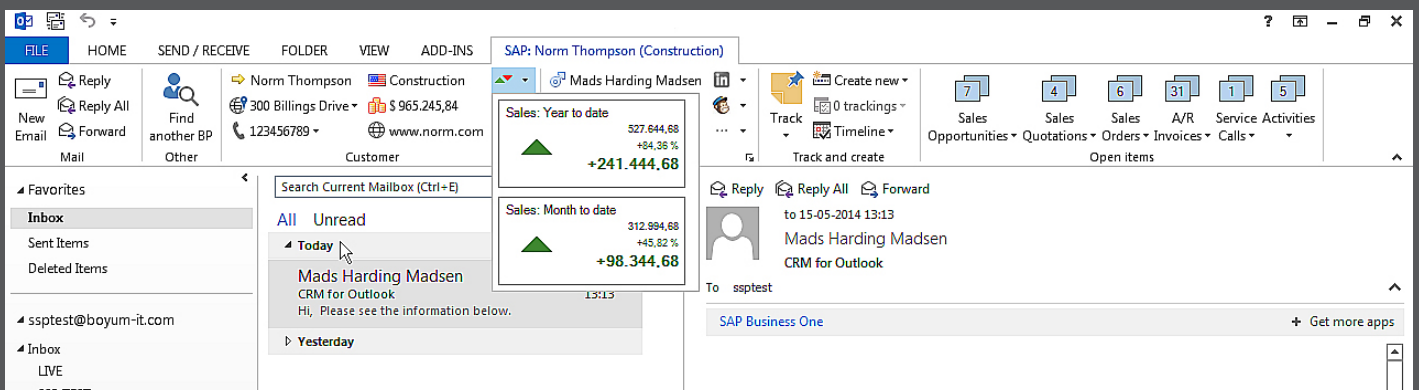
Improve your CRM capabilities

CRM for Outlook integrates SAP Business One with Microsoft Outlook and enables sales, support and management to perform and update important SAP Business One tasks directly in Outlook, saving time and increasing user adoption of your SAP Business One.

Whether you need to see the most recent sales to a customer or update a business opportunity on a lead you can now do this in Outlook. You no longer need to spend hours looking for vital information in different areas of SAP Business One. We offer you a CRM cockpit in Outlook that gives you all the info and power you need to handle CRM effectively directly from Outlook.

With CRM for Outlook, the users who prefer to work from the familiar Outlook environment can continue to do so without neglecting documentation in SAP Business One.

Outlook CRM software can eliminate the redundancy of opening separate applications for e-mails, sales activity tracking, and lead generation, making a user's life easier and reducing clutter. By working directly in Outlook, your employees can perform all of their key tasks and have them captured and organized within your SAP Business One system. Not only does this get employees to accept your SAP system, it ensures customer profiles stay up-to-date and accurate company-wide.



Features and benefits:

Create and manage business partners, contacts, opportunities and activities directly in Outlook, saving time and making updates easier.

Create and send emails in Outlook as you always do and link them to SAP Business One records (sales orders, contracts, activities etc.) directly in Outlook, making it easier to maintain a history of communications with customers.

On a timeline all employees can share and see recent activities connected to the relevant business partner.

Jump directly to information in SAP Business One with a single click, saving you a lot of time looking up data in SAP Business One.

Remote access gives you the information you need, whenever you need it.

The rollout of CRM for Outlook is very easy. The familiarity with Outlook allows user to get up and running quickly.

Customize for your own needs. Choose relevant UDF information from SAP Business One that you want to display on your Outlook ribbon when you receive an email.

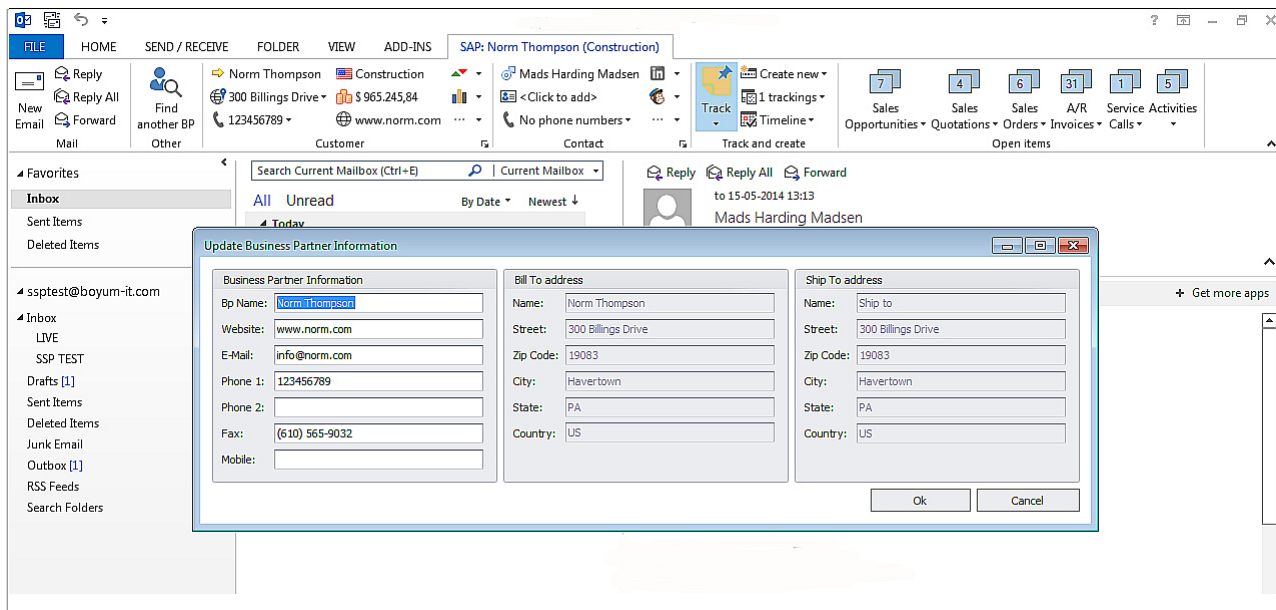
Create activities and service calls on the fly directly from Outlook. Your activities will appear in your Outlook Calendar.

Create new sales opportunities

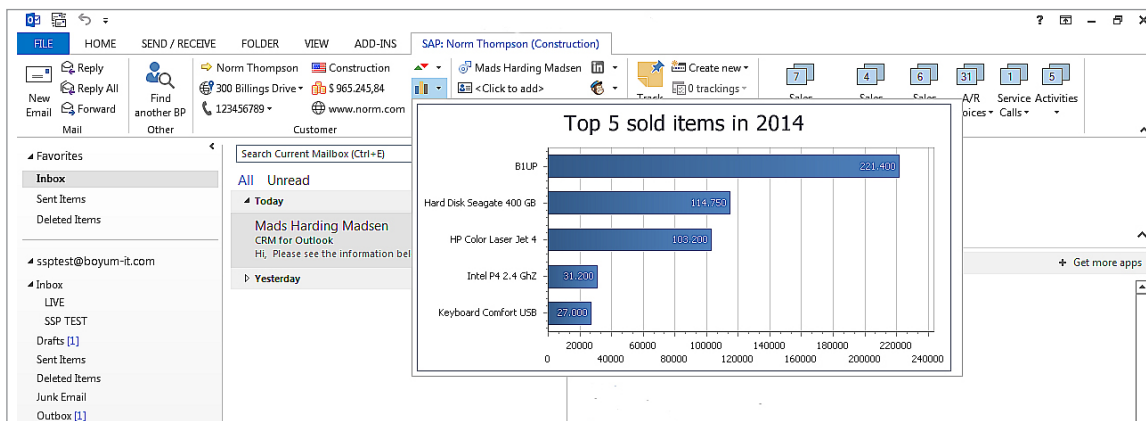
Improve your daily work routines further through integrations:

- Call your contacts from Skype or Lync
- Look up directions on Google Maps
- Go directly to the BP's web site in your favorite browser
- Manage campaigns in MailChimp and add contacts to your existing list
- See LinkedIn profile in ribbon and lookup in browser*

** Coming soon*

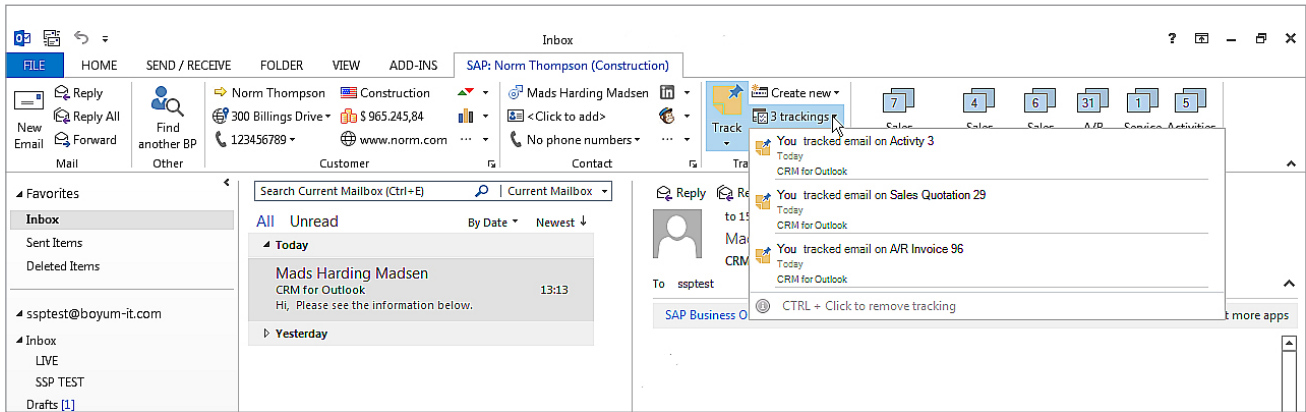


Any time you update a contact in Outlook, the contact will be updated in SAP Business One. If you are using our CRM for Outlook, you no longer need to copy and paste notes from one application to another.



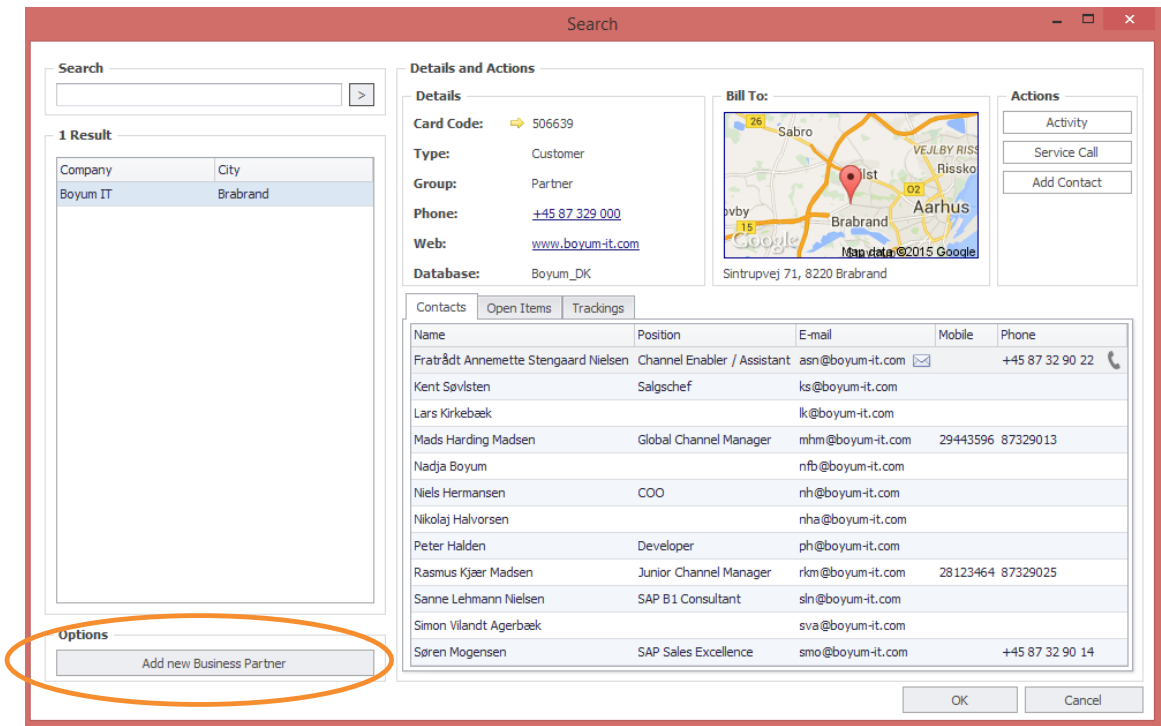
Get a clear overview over the top 5 sold products without ever leaving Outlook. It's presented to you right in the Outlook ribbon.

Business Partner



You can quickly review a business partner's recent activities, in addition to tracking your sales team's interaction with that customer.

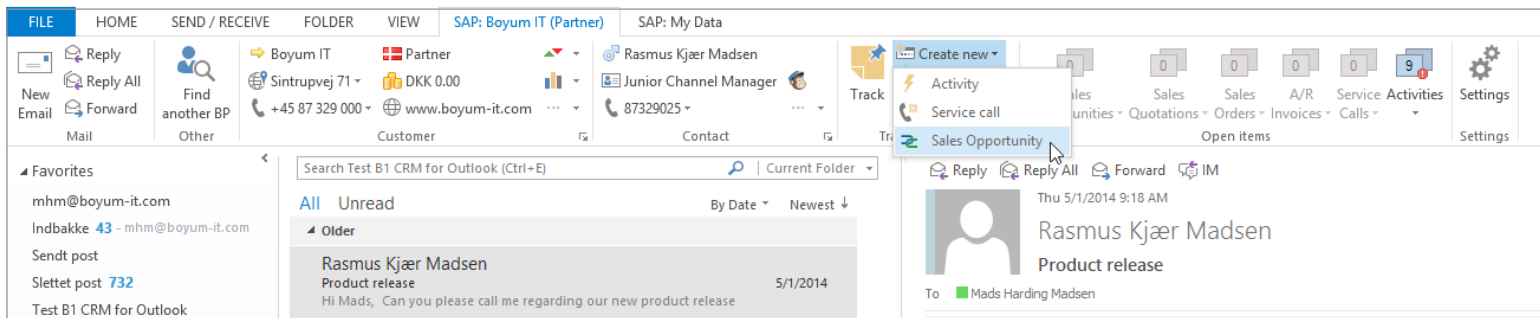
You can also grant access to everyone in your organization, keeping all employees up to date with the latest information regarding customer activity and contact information.



Under "Find another BP" you have the option to create new business partners as well as lockup existing business partners in your SAP Business One database. You have the option to select which database the new business partner should be created in.

Full search across your SAP Business One databases on contacts, emails, phone numbers, address etc.

Sales Opportunities



You have the option to create new sales opportunities, select the details and stages related to this specific sales opportunity.

Sales Opportunity

Business Partner:

506639

Boyum IT

Contact Person:

Rasmus Kjær Madsen

Sales Employee:

Mads Harding Madsen

Owner:

Madsen Mads

Opportunity Name:

Status:

Open

Start Date:

4/17/2015

Closing %:

20.00%

Potential

Stage

Udfs

Predicted Closing Date:

4/17/2015

Industry:

Ekstet. Kunde

Primary Interest:

Interests:

☒ SAP B1
☐ Konsulent
☐ Udvikling
☐ B1SN

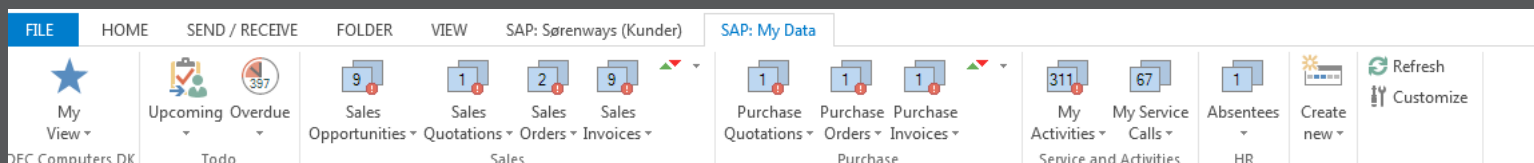
Comments:

Just signed up a new partner with a potential B1UP deal.

OK

Cancel

My Tab



On a separate ribbon you have your own customized tab with all information that is important and relevant for you.

- You can see all your open documents seven days before they are overdue and up to three days after the due date
- See all your open service and activities
- Under Absence you can see all absentees in your organization

Customize My Data

View Selection

Select which view you want to edit

My View

Create View

My View

General Features

☐ My Todo's

Sales Features

☐ My open Sales Opportunities
☒ My open Sales Quotations
☒ My open Sales Orders
☒ My open Sales Invoices
☐ Sales KPI

Purchasing Features

☐ My open Purchase Quotations
☐ My open Purchase Orders
☐ My open Purchase Invoices
☐ Purchase KPI

Service and activities

☒ My open Activities
☐ My open Service Calls

HR Features

☒ Absence overview

Creation Features

☒ Create Activity
☒ Create Sales Opportunity

OK

Cancel