More Than Just Software
We Take Your Business To The Next Level
Softengine News

Newsletter Vol. 24 - Introduction

Softengine News is dedicated to keeping you up to date with the latest information regarding SAP Business One systems, Softengine solutions and Best Business Practices.

What's New?

Spotlight on Product - CRM with SAP Business One; Win New Customers and Maintain Existing Relationships

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 sales opportunities by territory, customer, or product; conduct sales forecasts; and assess sales and service departments' performance.
And now you can use the **iPhone or iPad** to stay in touch with your business and customer data while away from the office. It enables you to instantly connect with your SAP Business One application via to check on inventory and customers, access reports, receive alerts, and process approvals. See: http://www.youtube.com/watch?v=RMK3rAWgodY.

Opportunities and Sales Management

With SAP Business One, you can efficiently manage your tasks and information throughout different stages in 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. Also, all activities can be linked to customers, vendors, and leads. For example, you can link activities to a sales lead and later drill down into these activities from the lead screen with one click. The sales opportunities functionality in SAP Business One lets you manage the entire sales process as it progresses 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 stages. The application immediately calculates projected gross profit and revenue. As the opportunity progresses through the various sales stages sand new data is entered, the expected profit and revenue calculations are dynamically updated to accurately reflect the current situation.

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Customer Relationship Management in SAP® Business One		
Opportunities and Sales	**Customer Contacts**	**Service**
Track and manage opportunities throughout the sales cycle	Manage lead and customer data in a simple user interface	Administer warranty and service information
Create instant price quotes, convert them to orders, and perform real-time product availability checks	Access customer balances, credit lines, opportunities, and open orders from a single screen	Respond to customer service requests from a central location
Generate sales documents more easily with a variety of templates	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	Automatically transfer data from master records to relevant transactions	Monitor service levels with alerts and reports

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.
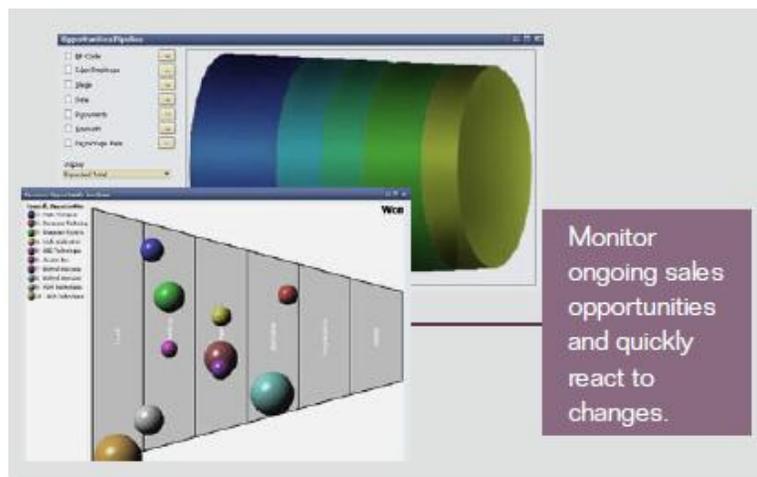
Sales Pipeline Monitor

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 relevant 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.

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.

Spotlight on Partner – AUTHORIZE.NET Payment Gateway Account

We are proud to offer online payments through our partner, Authorize.Net®, a leading provider of payment gateway services since 1996. Authorize.Net manages the complex routing of transaction data from your business to the credit card and electronic check payment processing networks, ensuring secure and reliable deposit of funds into your merchant account. Features include **Online and Manual Payments**; Accept online payments via your website and your SAP Business One with Softengine's Credit Card Module. **Payment Types** include Visa®, MasterCard®, American Express®, Discover® and electronic checks. **Security** is assured by being Payment Card Industry (PCI) Data Security Standard compliant. **Risk Management** is provided; you never need to store sensitive data on your computer – Authorize.Net safeguards it in their secure data center. **Fraud Prevention** includes standard features, as well as optional Advanced Fraud Detection Suite™ (AFDS), help you recognize suspicious transactions. You can open an account from our Softengine website Partner page or from http://reseller.authorize.net/application/?id=5554387

For more information about how SAP can help your business close more sales and serve existing customers, please contact Barry Lederman: 818.704.7000, blederman@softengineusa.com