

# SAP Business One Sales

August 2017



# SAP Business One Sales - Introduction



**SAP Business One Sales lets you effectively handle your sales activities anywhere, anytime.**

**Sales reps gain access to the most relevant business information and processes, for efficient and successful management of customers and sales.**

## **Dedicated:**

- Tailored for sales roles, holistic CRM management drives sales productivity
- Insight to customers, deals, predictability in sales operations

## **Intuitive:**

- User-oriented and easy to use

## **Interactive:**

- Access data in real time
- Respond directly and trigger processes
- All changes automatically update the SAP Business One backend



# SAP Business One Sales - Technical Information

## Requirements for iOS

- SAP Business One 9.2 PL1, version for SAP HANA, or higher
- Apple iPhone 5 or newer, iOS 8.0 or higher
- Download from Apple App Store

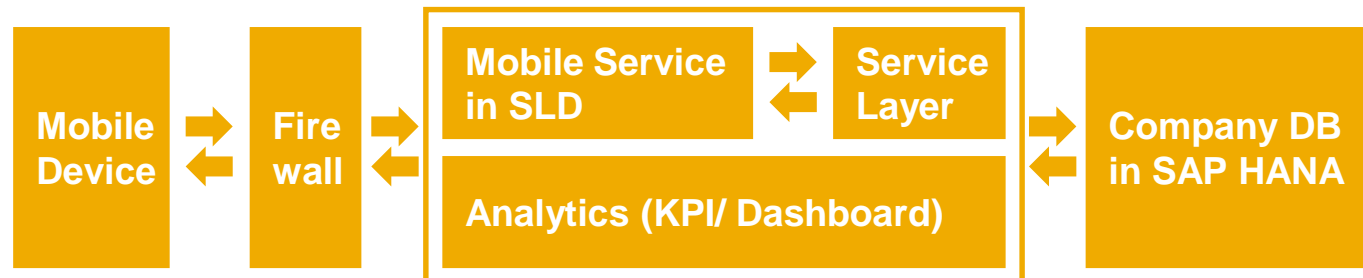
**Supports:** Service Layer, SAP Business One Analytics, and App Framework

**License:** Professional, Limited CRM, Starter Package, and Mobile Sales users (new)

**Security:** Basic access authentication at logon, license-based function-level and user-based data-level authorization (data ownership), valid SSL certificates enforced, Apple Touch ID

**Languages:** All 27 languages of SAP Business One

**Connection flow:**



## Requirements for Android

- SAP Business One 9.2 PL3, version for SAP HANA, or higher
- Android 7.0
- Download from Google Play Store

# SAP Business One Sales - Getting Started

## Home Page:

- Central access to all sales-relevant modules
- Shows number of open items
- Access to SAP Business One calendar and activities



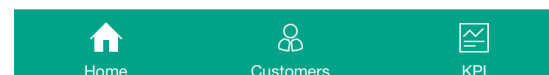
—● 27 Feb 2017 (0)

—● 28 Feb 2017 (0)

—● 1 Mar 2017 (0)

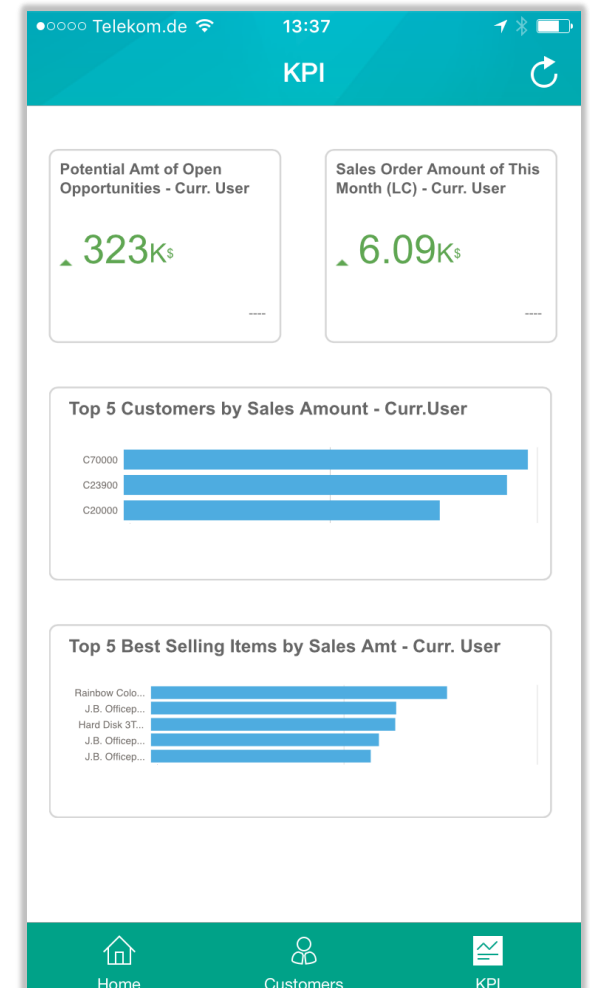
—● 2 Mar 2017 (0)

—● 3 Mar 2017 (0)



## Key Performance Indicator (KPI) Screen shows user-specific dashboards:

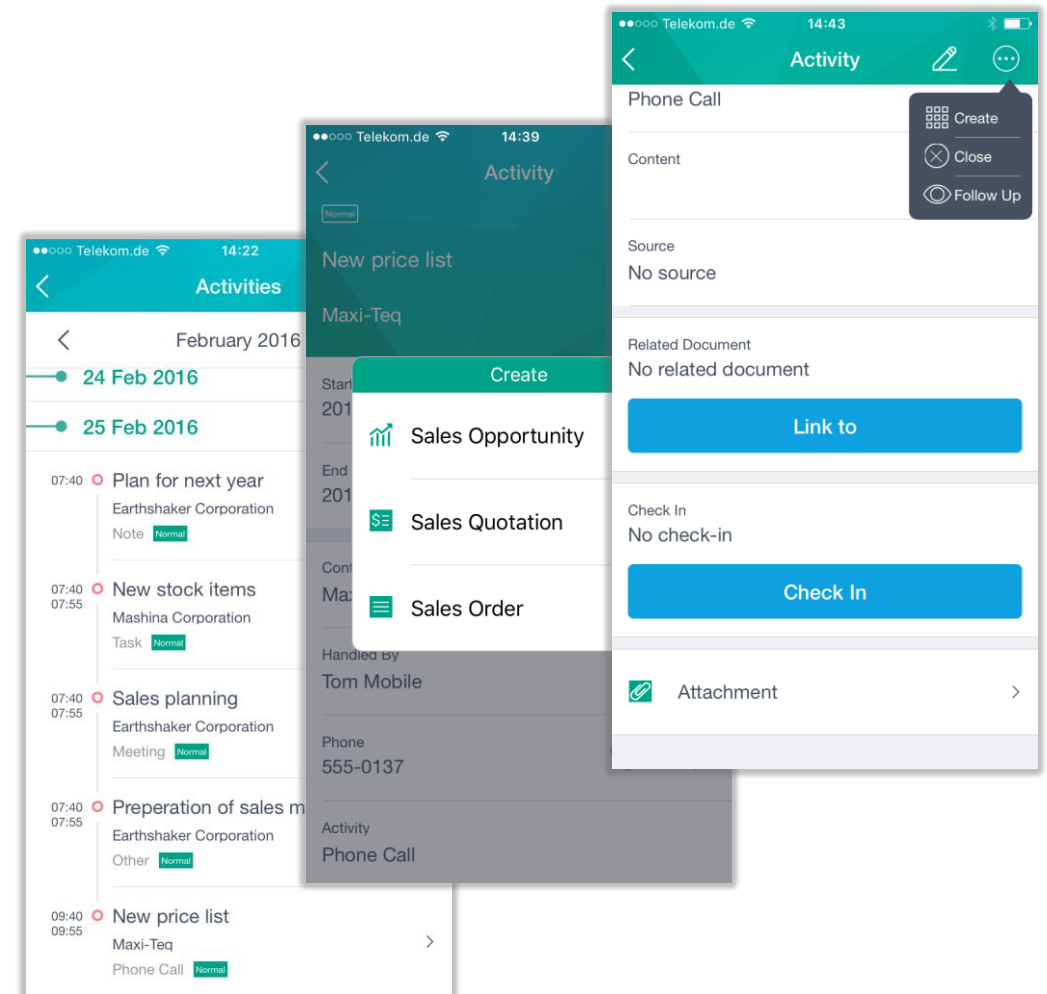
- Potential amounts of open opportunities
- Sales Order amount of the current month
- Top 5 customers
- Top 5 best-selling items



# SAP Business One Sales - Managing Activities

## Features:

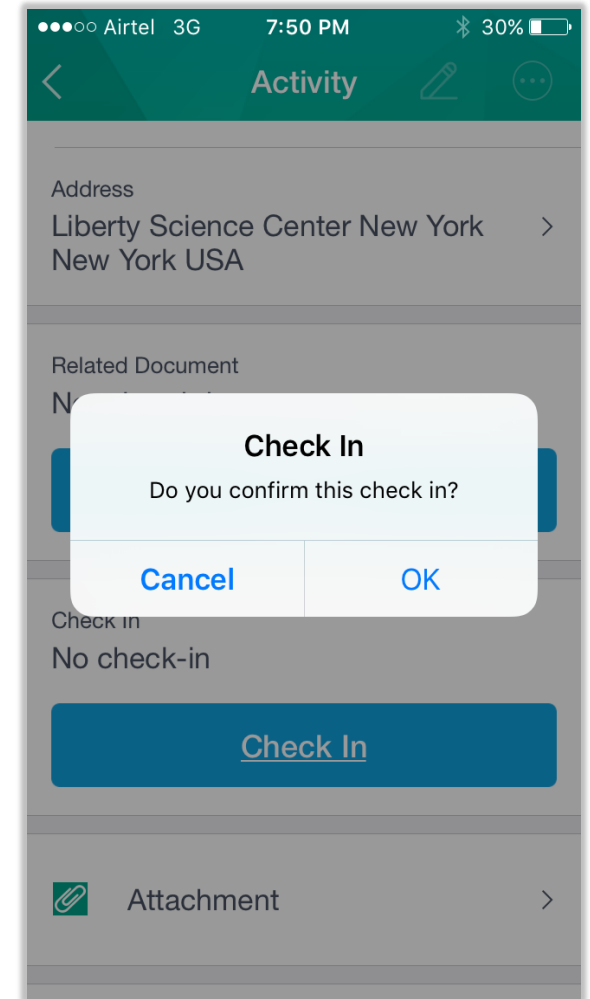
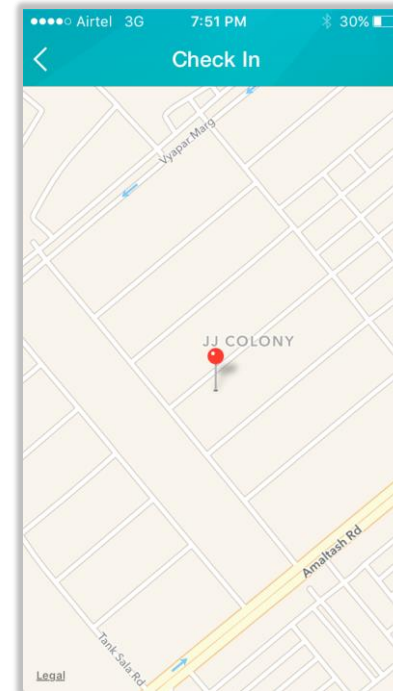
- View activities assigned to you in a calendar format
- Edit and close existing activities or create new activities
- Create follow-up activities
- Create sales opportunities, quotations, or orders based on activities
- Link related documents such as sales quotations or orders
- Upload attachments to activities



# SAP Business One Sales - Location based check-in

## Powerful and convenient scenario to check-in location of sales activities

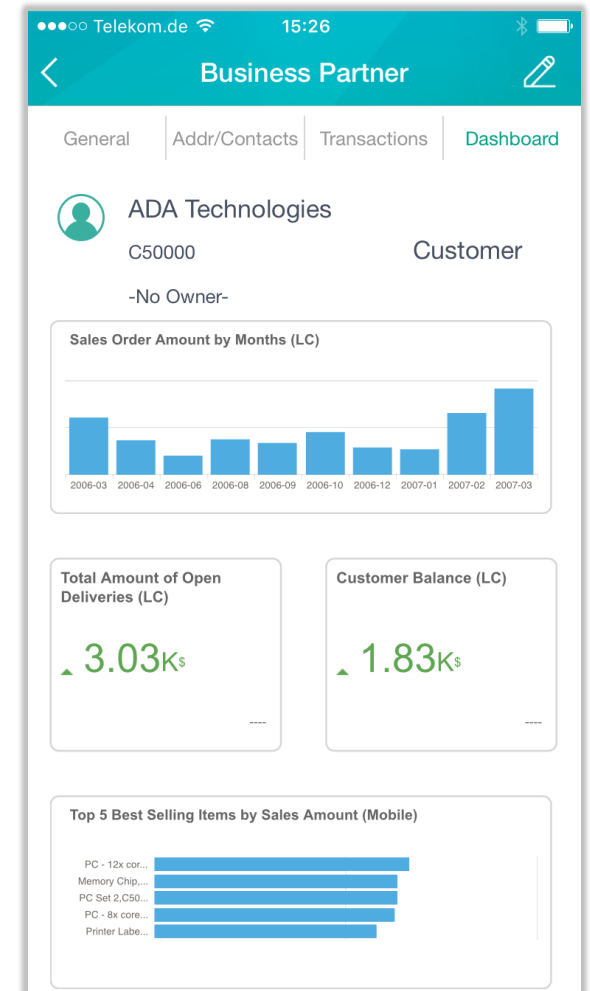
- Reports the location of an activity for every stage of the sales process
- Check-in data can be used for effective monitoring of activities by sales managers using a dedicated activity report within the SAP Business One client
- Embedded in iOS/Google geographic services



# SAP Business One Sales - Managing Customer Data (1/2)

## Features:

- Create new customers or leads, view Business Partner details, including related activities, sales documents (sales quotations, sales orders, sales opportunities), special prices and account information
- Modify contact details, log new activities, initiate a phone call, email, or text messages directly
- Locate your contact on a map and plan a route
- Download/upload attachments to business partners
- Support of Business Partner data ownership function



# SAP Business One Sales - Managing Customer Data (2/2)

## Features (continued):

- Filter by business partner type - Customer or Lead
- Sort by Name, Code or Intelligent Sort such as monetary value, frequency, account balance, churn probability and more
- Customer is rated with 1-5 stars, based on frequency of orders and monetary values
- The churn field displays the customer attrition risk as well as the churn probability
- Average amount per sales order displayed next to the proposed re-order date
- Leads get displayed by industry, activity days

**Maxi-Teq**  
C20000

★★★★★

R: 5 days ago      F: 4.3 SOs/Yr      M: 542.9 K

Account Balance: 16.5 K      Credit Limit Used: N/A      Churn: M (67%)

Proposed Reorder Date: 2016-09-05      12.1 K / SO

Business Partners

Name      Code      Intelligent Sort

Recency

Frequency

Monetary

Account Balance

Business Partners

Customer      Lead

**Earthshaker Corporat...**  
C40000

★★★★★

R: 3 days ago      F: 5.2 SOs/Yr      M: 456.0 K

Account Balance: 9.5 K      Credit Limit Used: N/A      Churn: H (92%)

Proposed Reorder Date: 2016-08-24      8.4 K / SO

**Maxi-Teq**  
C20000

★★★★★

R: 5 days ago      F: 4.3 SOs/Yr      M: 542.9 K

Account Balance: 16.5 K      Credit Limit Used: N/A      Churn: M (67%)

Proposed Reorder Date: 2016-09-05      12.1 K / SO

**Web Customer**  
C99998

☆☆☆☆☆

R: 0 days ago      F: 0.0 SOs/Yr      M: 0.0

Account Balance: 0.0      Credit Limit Used: N/A      Churn: M (42%)

Proposed Reorder Date: 2016-06-17      0.0 / SO

Home      Customers      KPI



# SAP Business One Sales - Viewing Items in Items Module

## Features:

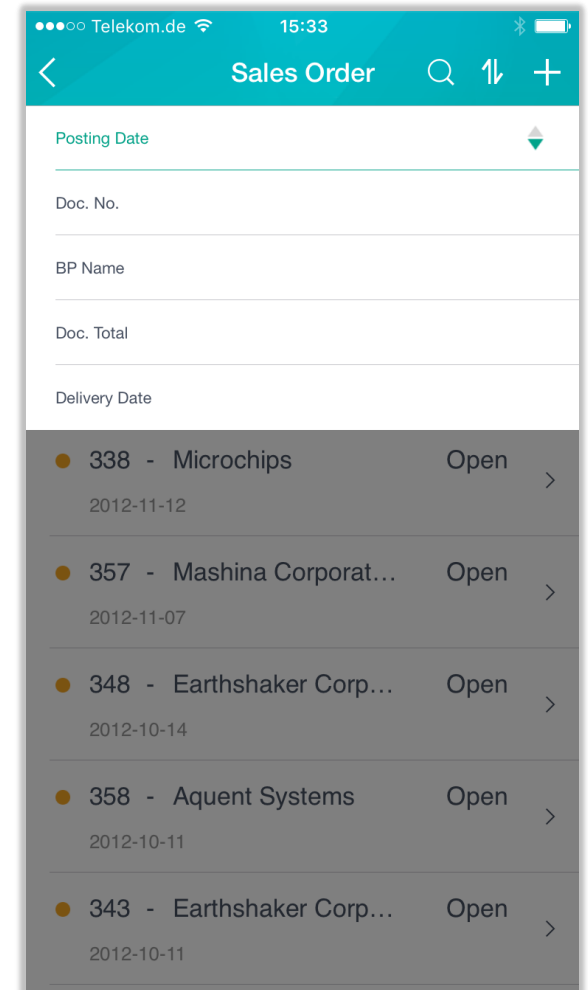
- View information about items in inventory, including unit price or in-stock quantity
- View the quantity of an item by warehouse location
- Search for items in inventory
- Check item in assigned price lists

Inventory by Warehouse			
<b>All</b>			
Available:	1.055	In Stock:	1.061
Ordered:	8	Committ...	14
<b>01 - General Warehouse</b>			
Available:	1.025	In Stock:	978
Ordered:	10	Committ...	5
<b>02 - West Cost Warehouse</b>			
Available:	30	In Stock:	978
Ordered:	10	Committ...	5
<b>03 - Dropship Warehouse</b>			
Available:	0	In Stock:	978
Ordered:	10	Committ...	5
<b>04 - Consignment Warehouse</b>			
Available:	0	In Stock:	978
Ordered:	10	Committ...	5
<b>05 - Bin Warehouse</b>			
Available:	0	In Stock:	978
Ordered:	10	Committ...	5

# SAP Business One Sales – Managing Sales Documents (Orders and Quotations)

## Features:

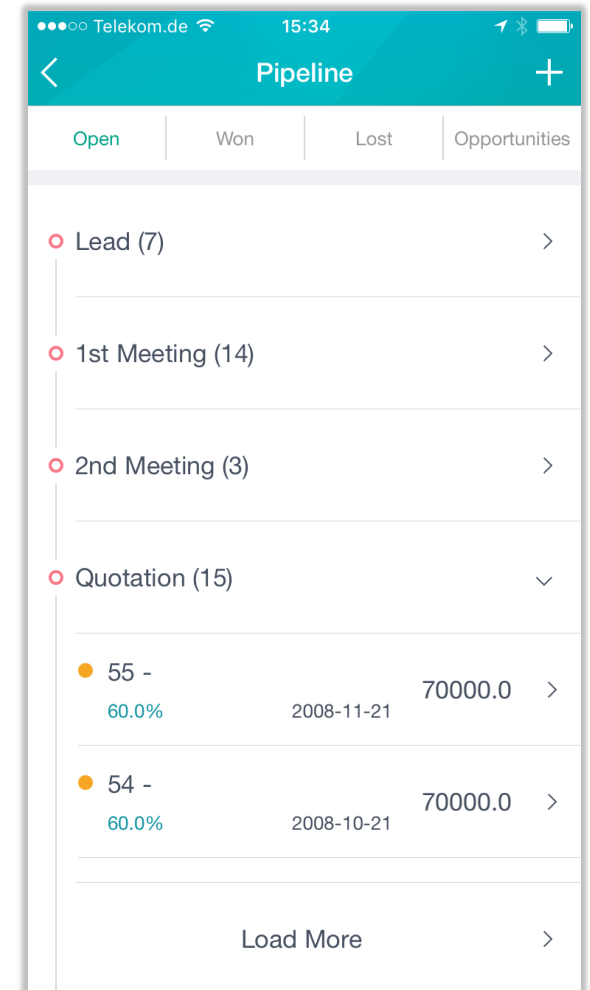
- Search, create and cancel sales quotations, and sales orders
- Update existing sales quotations and sales orders and manage activities related to these documents
- Sort documents by document number, BP name, document total or delivery date
- Copy sales quotations to sales orders
- View, add, edit and close activities related to sales quotations and sales orders
- Data ownership for documents



# SAP Business One Sales - Managing Sales Opportunities

## Features:

- Create, view, and search for sales opportunities
- View, edit, and create stages for sales opportunities
- Display all the sales opportunities in pipeline mode



# SAP Business One Sales - Managing Attachments

## Features:

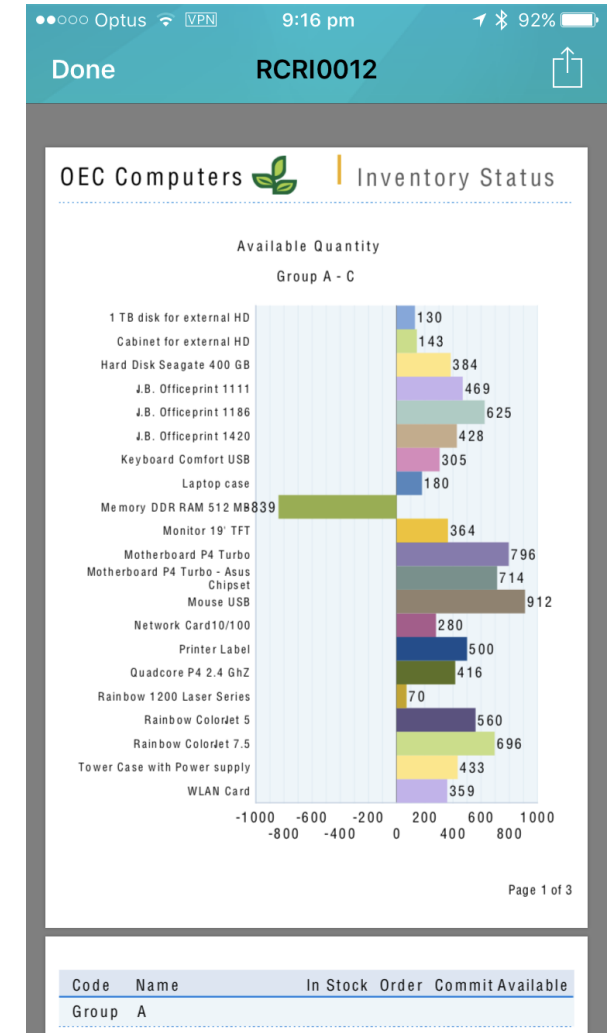
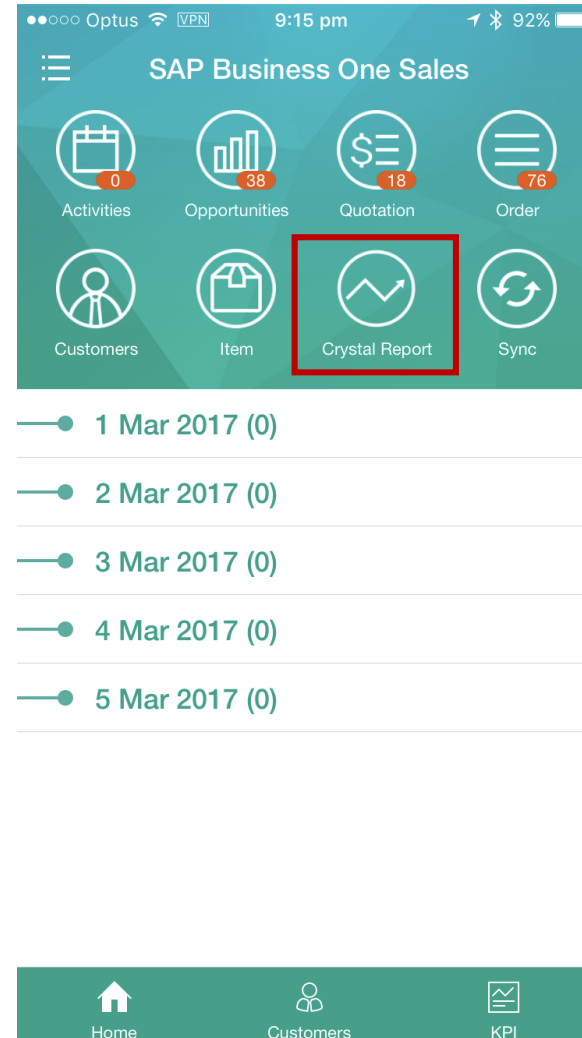
- View, download, and upload attachments from and to business partners, items, activities, sales opportunities, sales documents, and service calls
- Files of image types are displayed directly. For other file types, a system message asking which program to use for opening the file appears
- Upload attachments of image file types only, by either browsing to the required image file, or by taking a picture using your mobile device



# SAP Business One Sales - Crystal Reports

## Features:

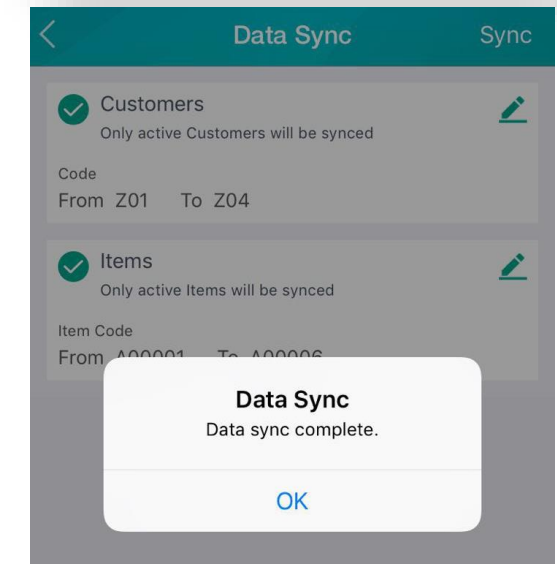
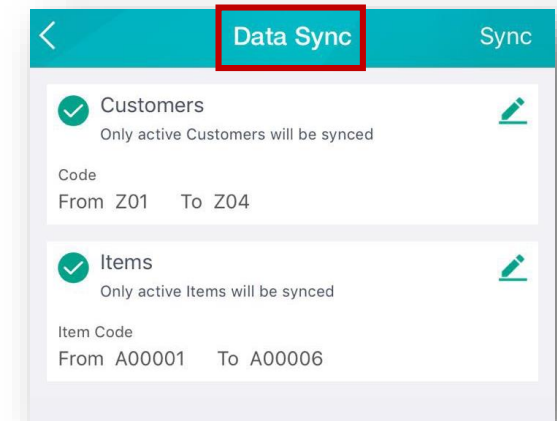
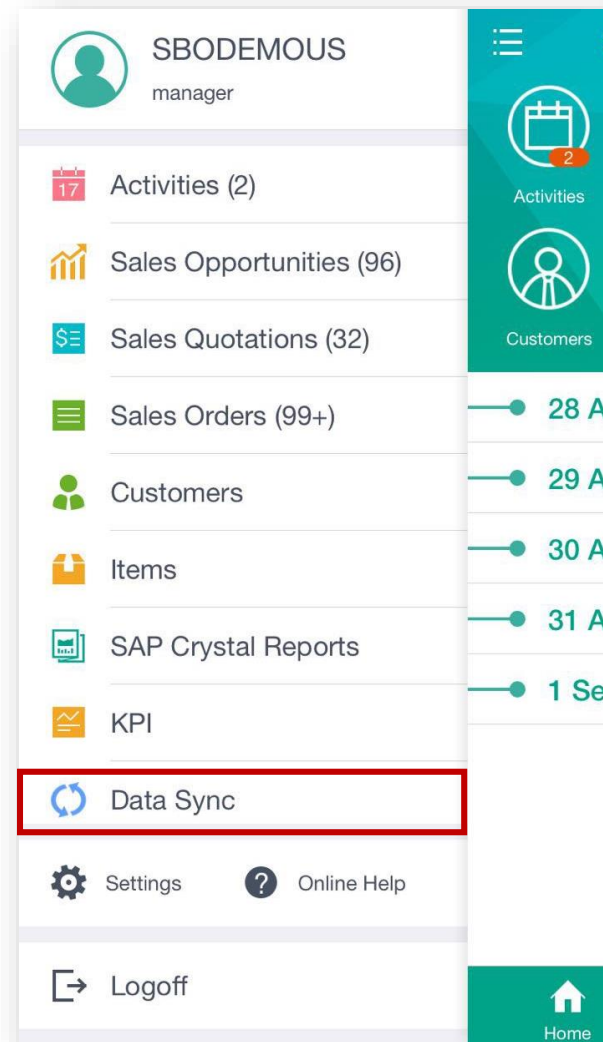
- New Crystal Report menu option for SAP Business One Sales.
- Easily view your SAP Business One crystal reports to make informed decisions on the run.
- Download and/or share your crystal reports easily with others.



# SAP Business One Sales - Data Synchronization for Offline Mode

## Features:

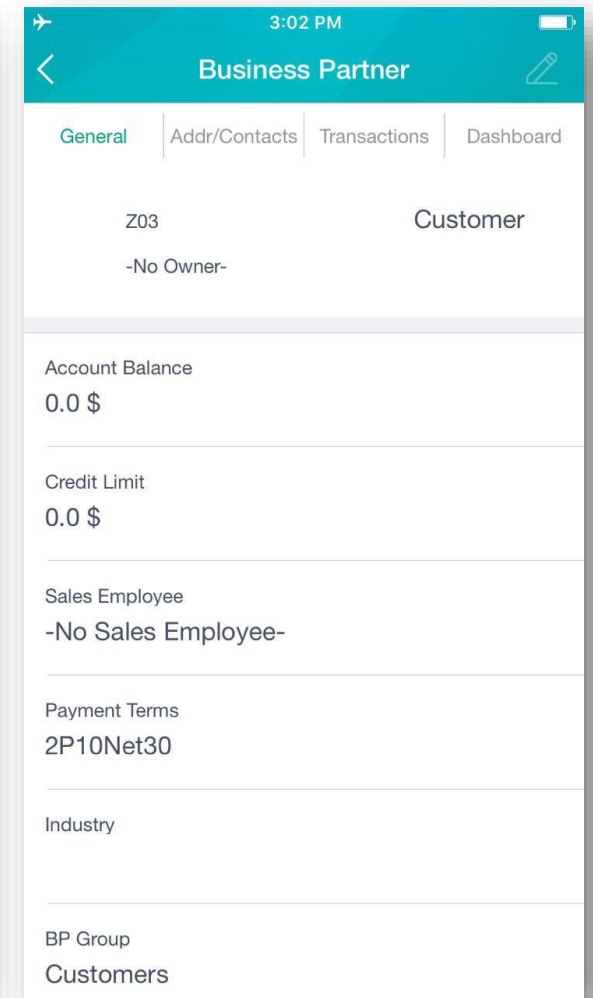
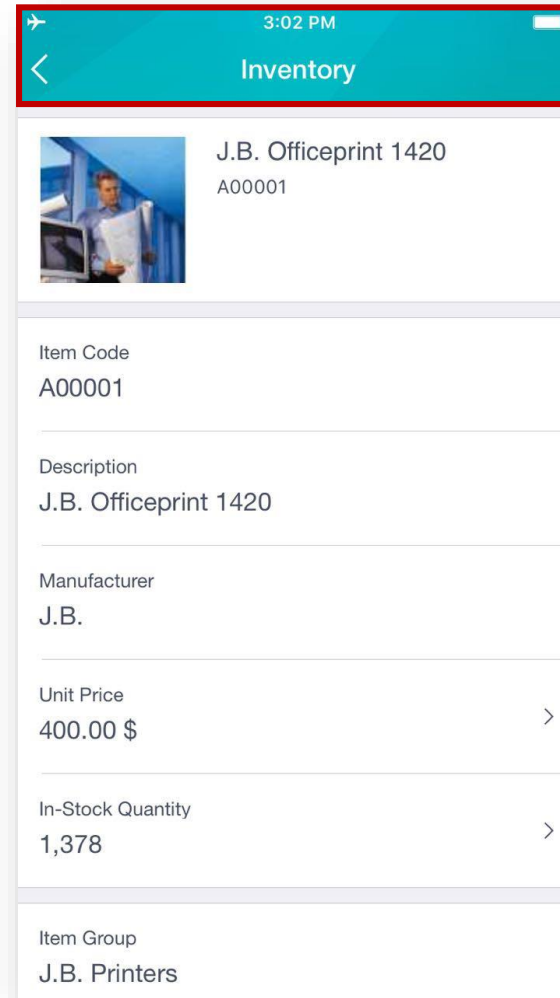
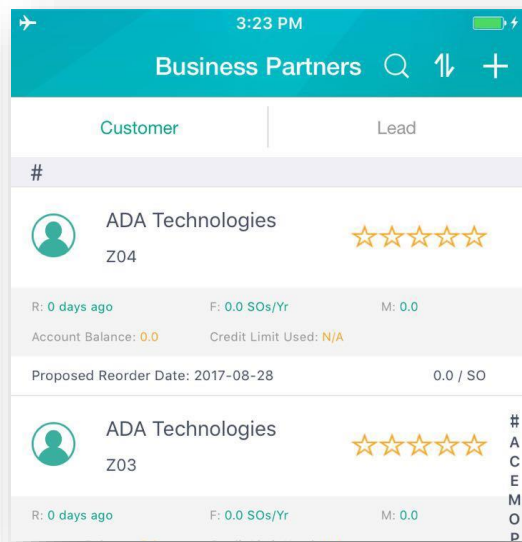
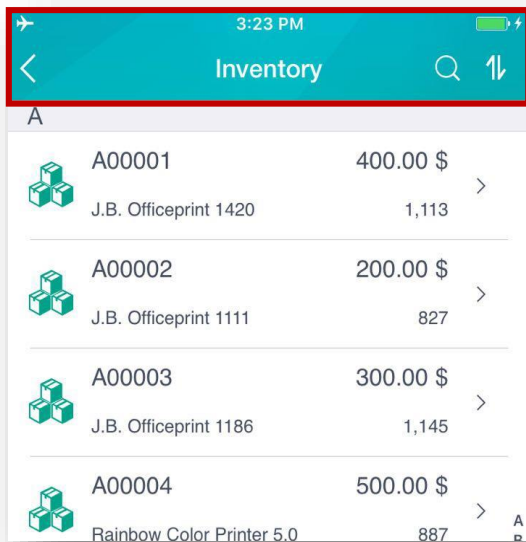
- Business Partner & Items details can be downloaded in batches and viewed in offline mode.
- Large numbers of business partner data and items are able to be synchronized to your local mobile device easily.



# SAP Business One Sales – Caching for Offline Mode

## Features:

- All Business Partner and Item data is now cached.
- You can set filters to select the data you would like to cache.
- Allows you to view data in offline mode.



# SAP Business One Sales

## Summary:

1. Clear sales oriented functional scope
2. Using service layer and Fiori-style design
3. SAP HANA analytics elements
4. Easy setup, user-oriented, high usability
5. New, affordable license option
6. Comprehensive security

Detailed introduction and free trial:

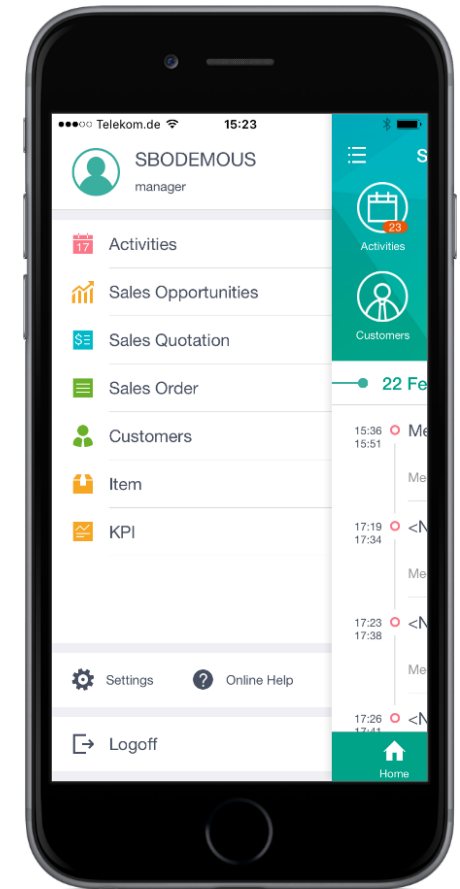
[SAP Business One sales app](#)



SAP Business One Sales for iOS



SAP Business One Sales for Android





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