

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

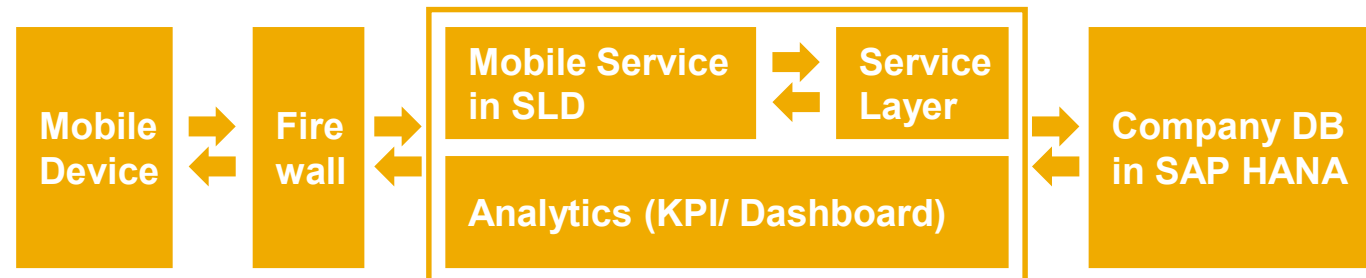
Supports: Service Layer, SAP Business One Analytics, and App Framework

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:



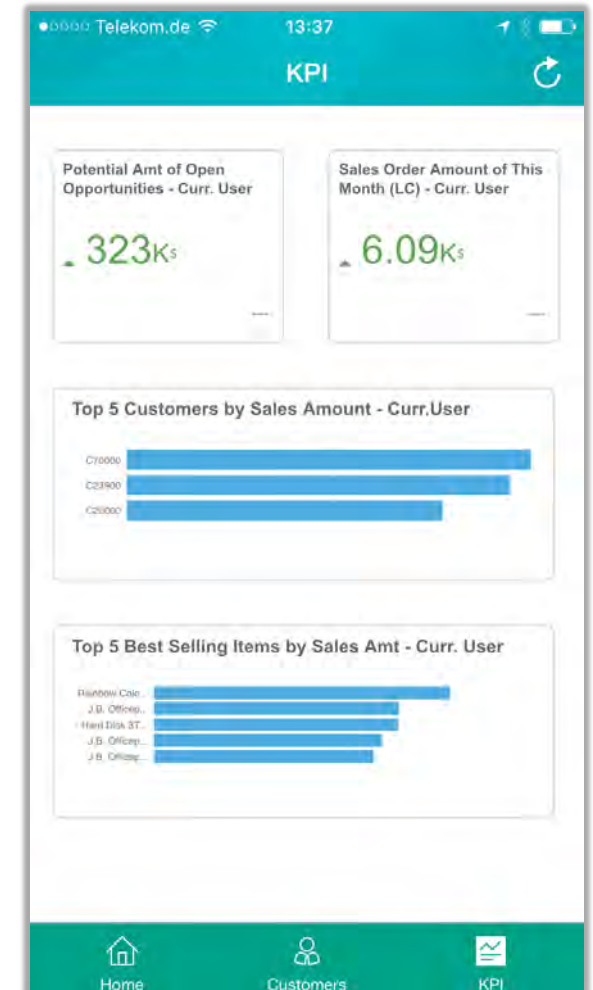
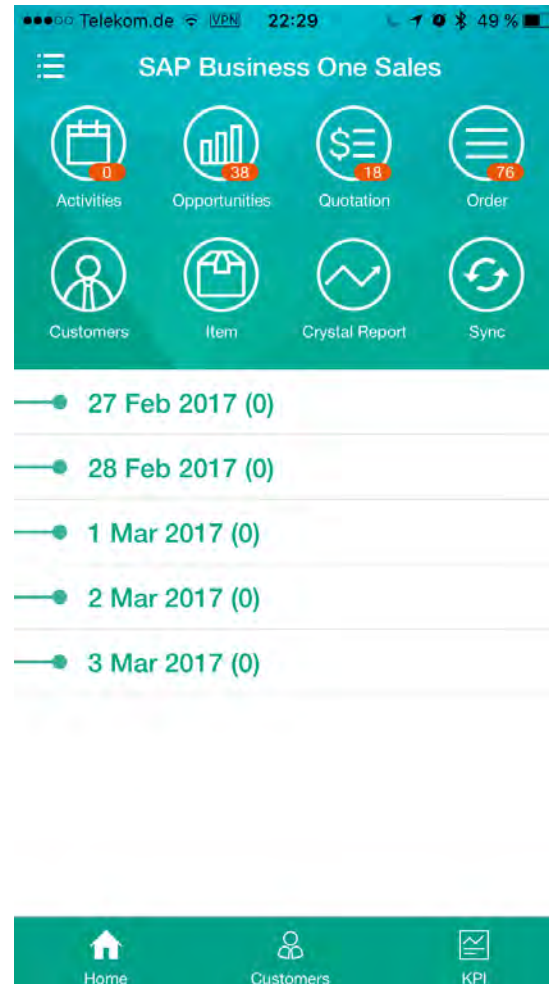
SAP Business One Sales - Getting Started

Home Page:

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

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

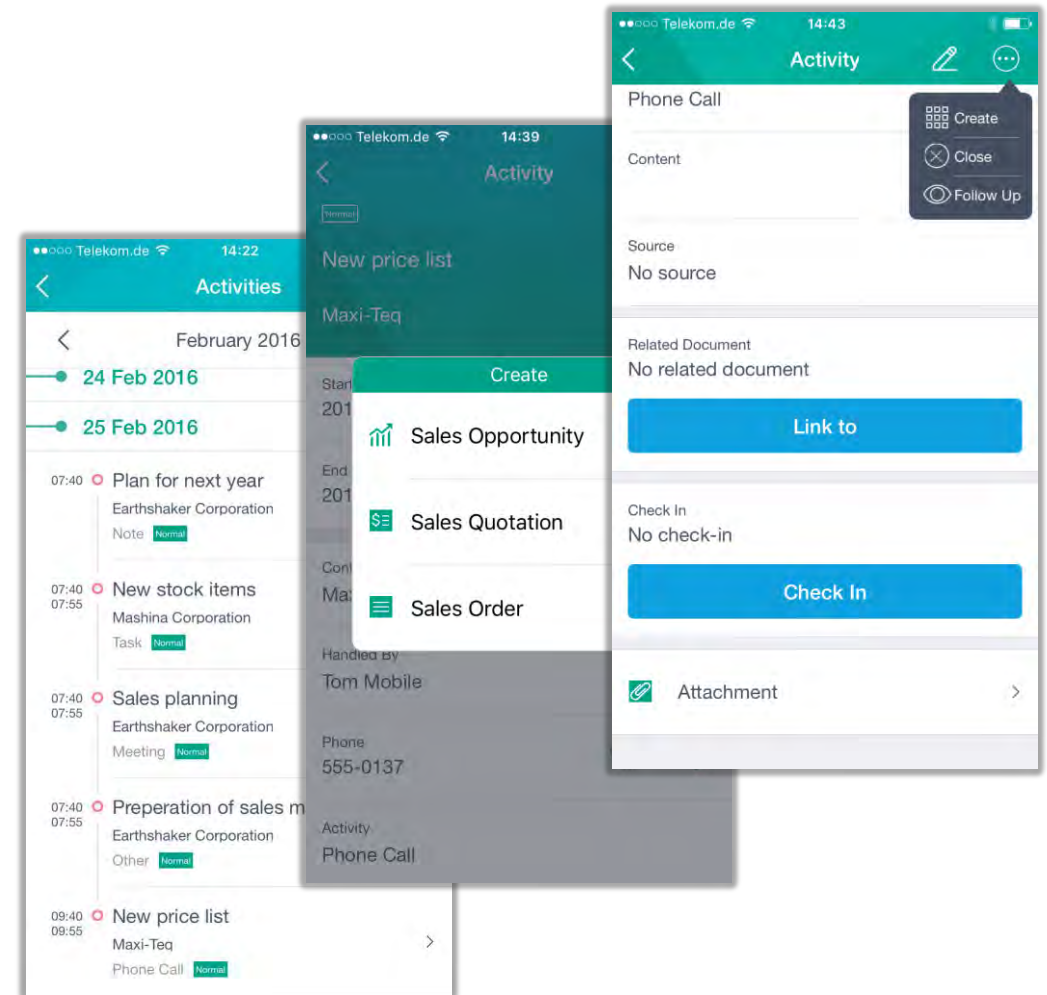
- Potential amounts of open opportunities
- Sales Order amount of the current month
- Top 5 customers
- Top 5 best-selling items



SAP Business One Sales - Managing Activities

Features:

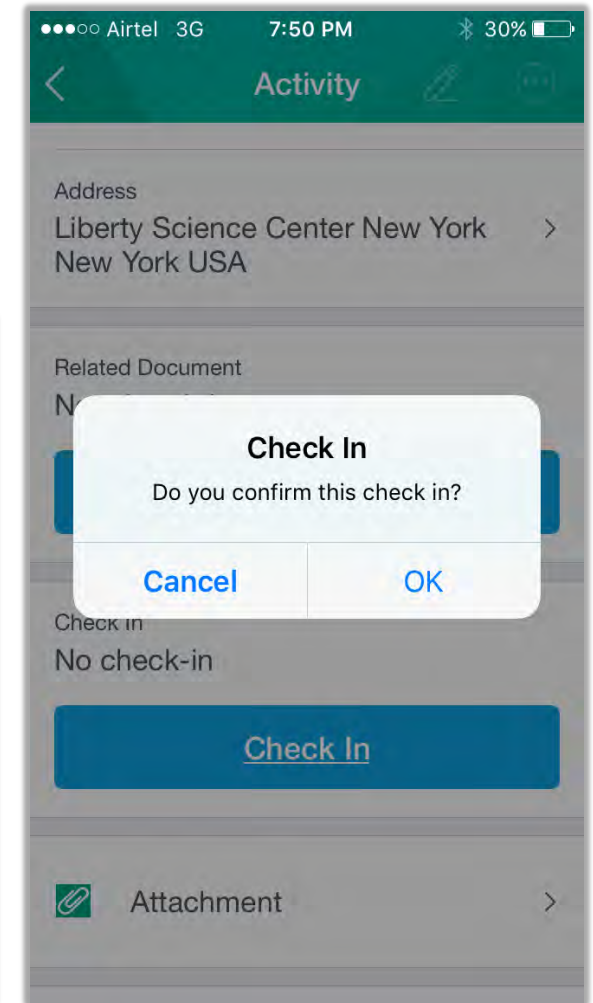
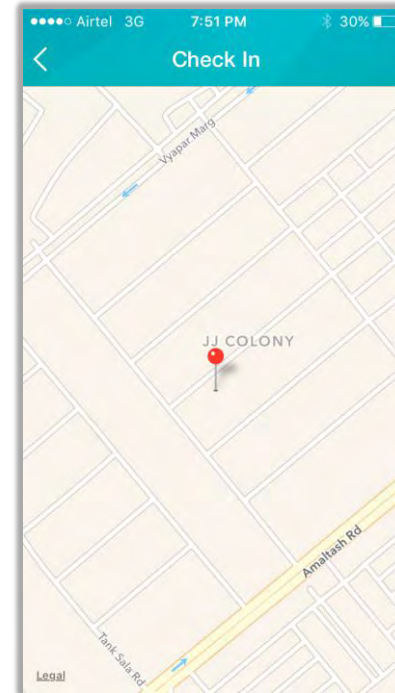
- View activities assigned to you in a calendar format
- Edit and close existing activities or create new activities
- Create follow-up activities
- Create sales opportunities, quotations, or orders based on activities
- Link related documents such as sales quotations or orders
- Upload attachments to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



SAP Business One Sales - Location based check-in

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

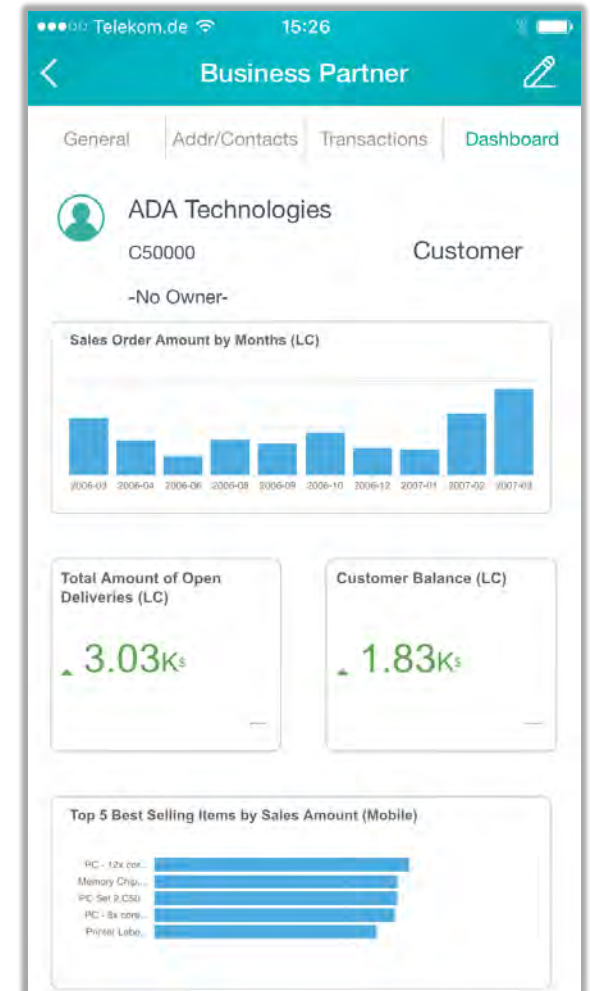
- Reports the location of an activity for every stage of the sales process
- Check-in data can be used for effective monitoring of activities by sales managers using a dedicated activity report within the SAP Business One client
- Embedded in iOS/Google geographic services



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

Features:

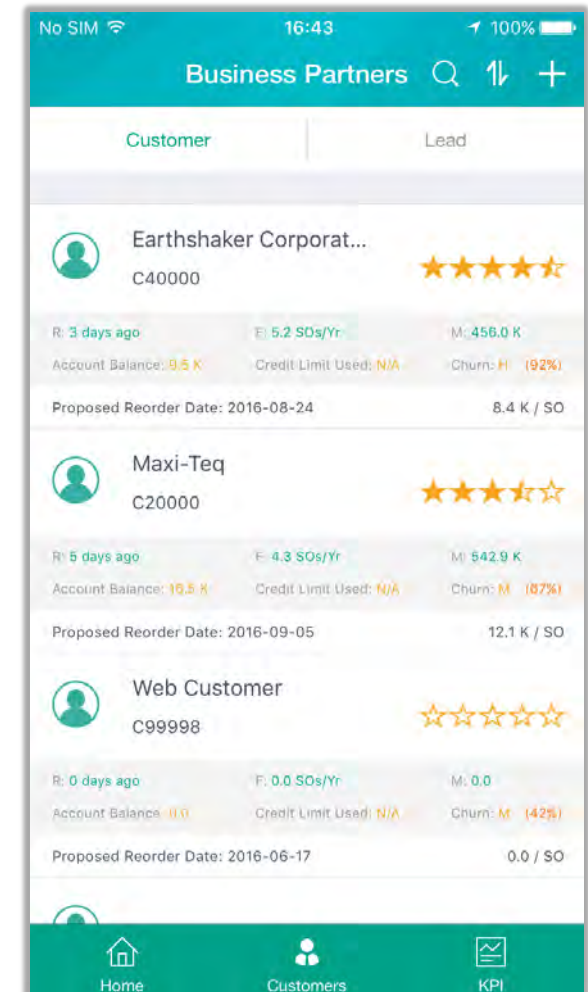
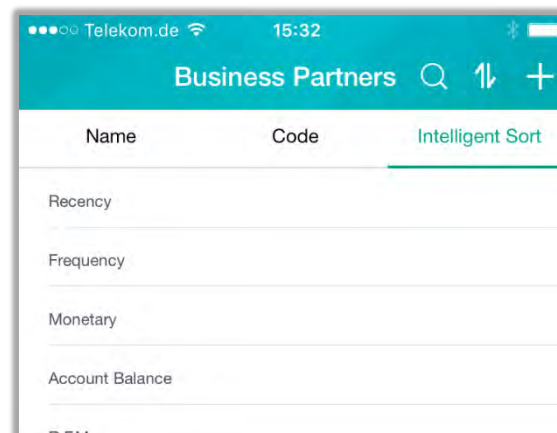
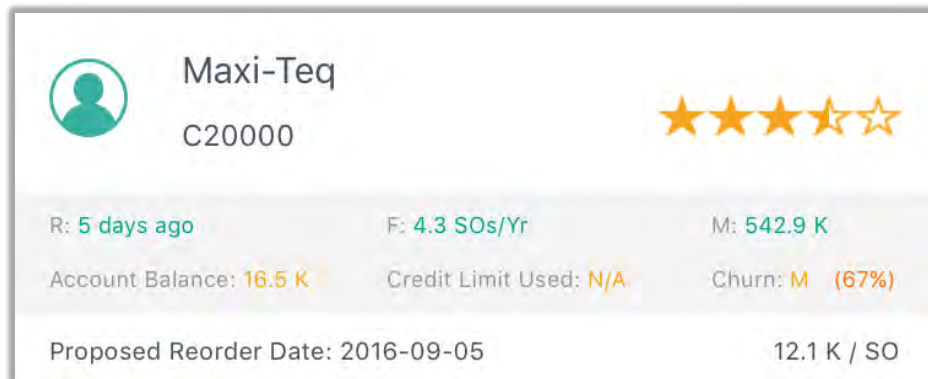
- Create new customers or leads, view Business Partner details, including related activities, sales documents (sales quotations, sales orders, sales opportunities), special prices and account information
- Modify contact details, log new activities, initiate a phone call, email, or text messages directly
- 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):

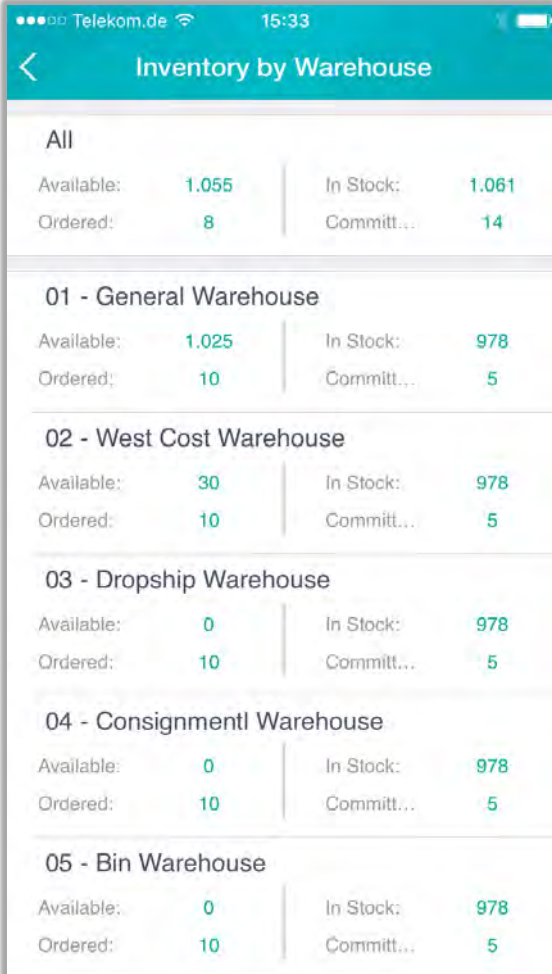
- Filter by business partner type - Customer or Lead
- Sort by Name, Code or Intelligent Sort such as monetary value, frequency, account balance, churn probability and more
- Customer is rated with 1-5 stars, based on frequency of orders and monetary values
- The churn field displays the customer attrition 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



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

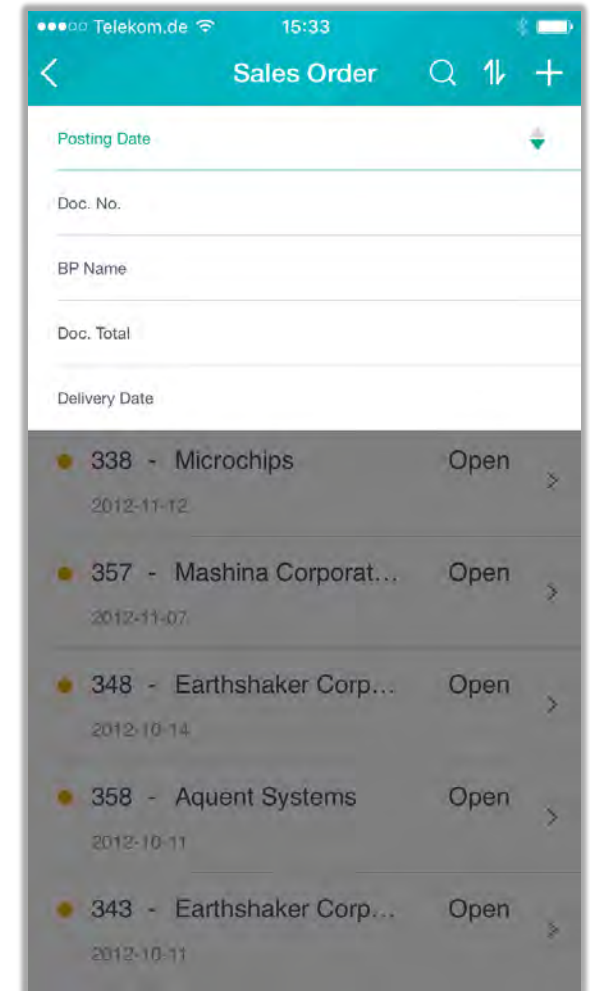


Inventory by Warehouse			
All			
Available:	1.055	In Stock:	1.061
Ordered:	8	Committ...	14
01 - General Warehouse			
Available:	1.025	In Stock:	978
Ordered:	10	Committ...	5
02 - West Cost Warehouse			
Available:	30	In Stock:	978
Ordered:	10	Committ...	5
03 - Dropship Warehouse			
Available:	0	In Stock: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

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

Features:

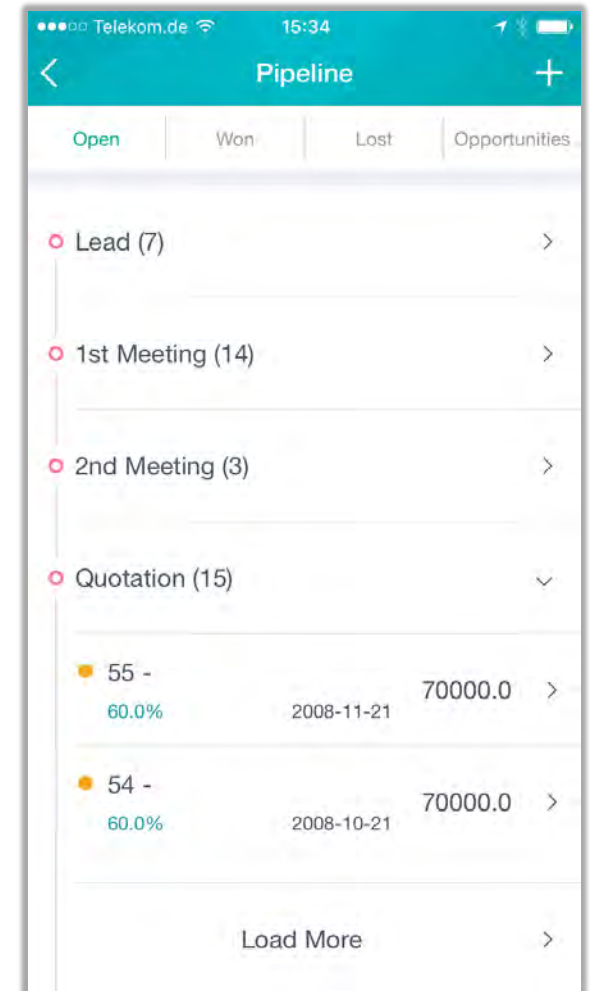
- Search, create and cancel sales quotations, and sales orders
- Update existing sales quotations and sales orders and manage activities related to these documents
- Sort documents by document number, BP name, document total or delivery date
- Copy sales quotations to sales orders
- View, add, edit and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

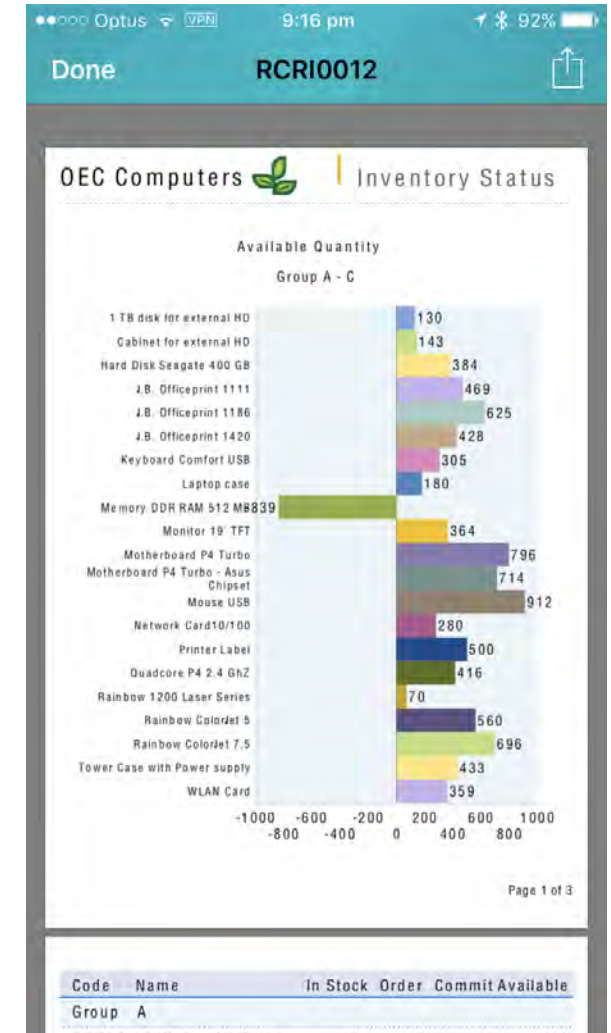
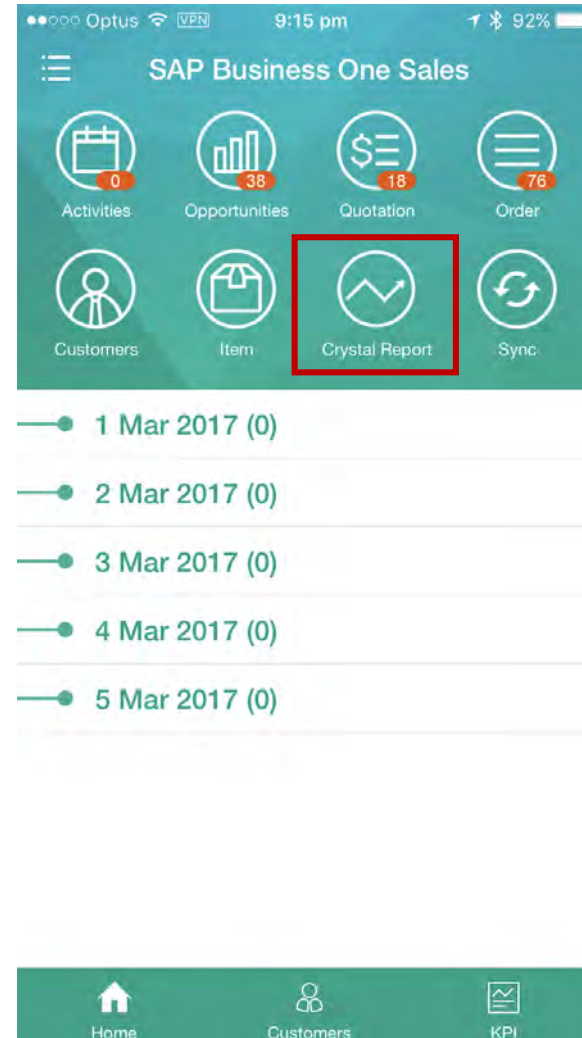
- View, download, and upload attachments from and to business partners, items, activities, sales opportunities, sales documents, and service calls
- Files of image types are displayed directly. For other file types, a system message asking which program to use for opening the file appears
- Upload attachments 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:

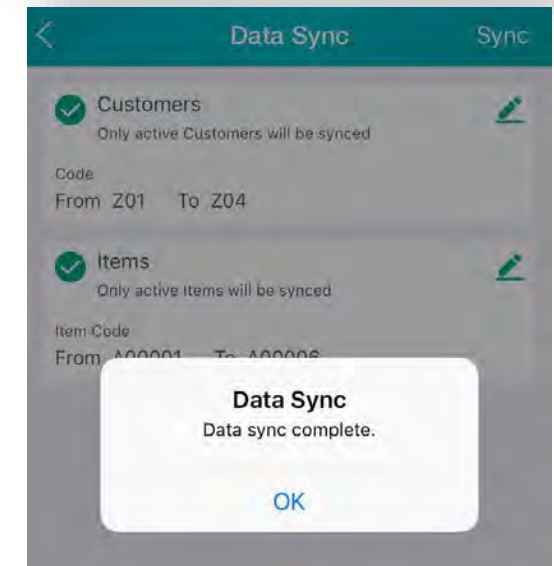
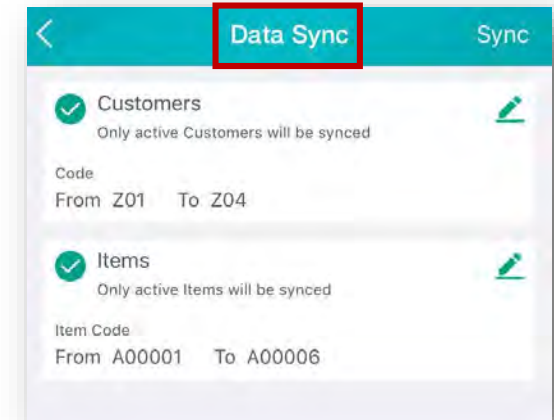
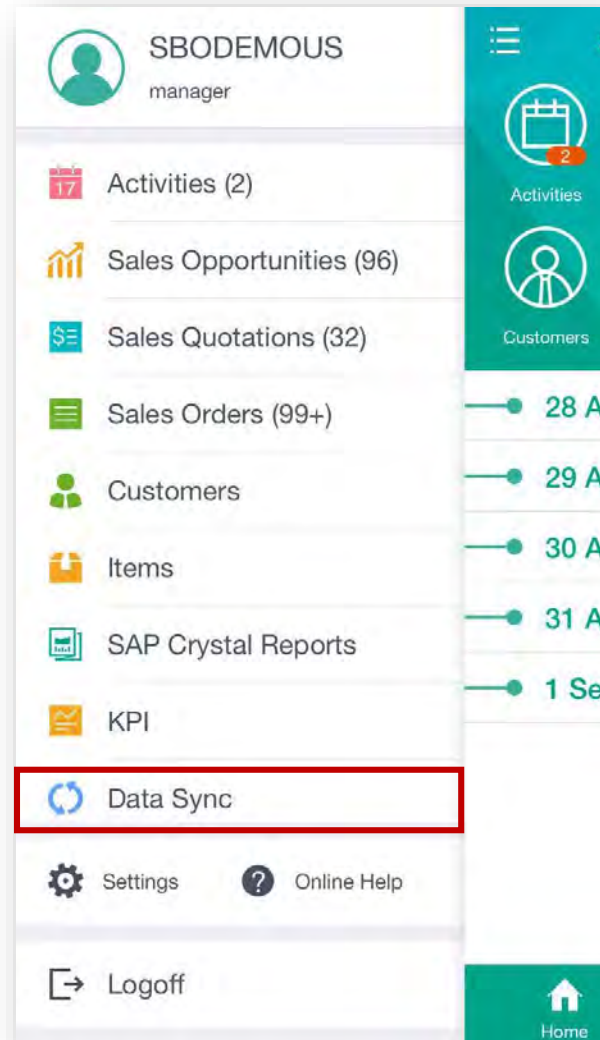
- New Crystal Report menu option for SAP Business One Sales.
- Easily view your SAP Business One crystal reports to make informed decisions on the run.
- Download and/or share your crystal reports easily with others.



SAP Business One Sales - Data Synchronization for Offline Mode

Features:

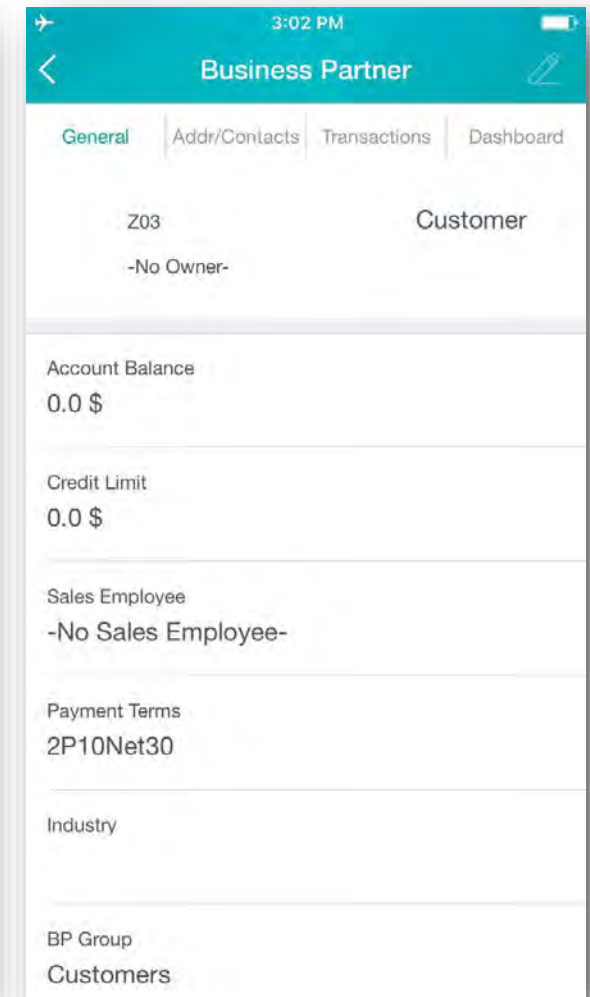
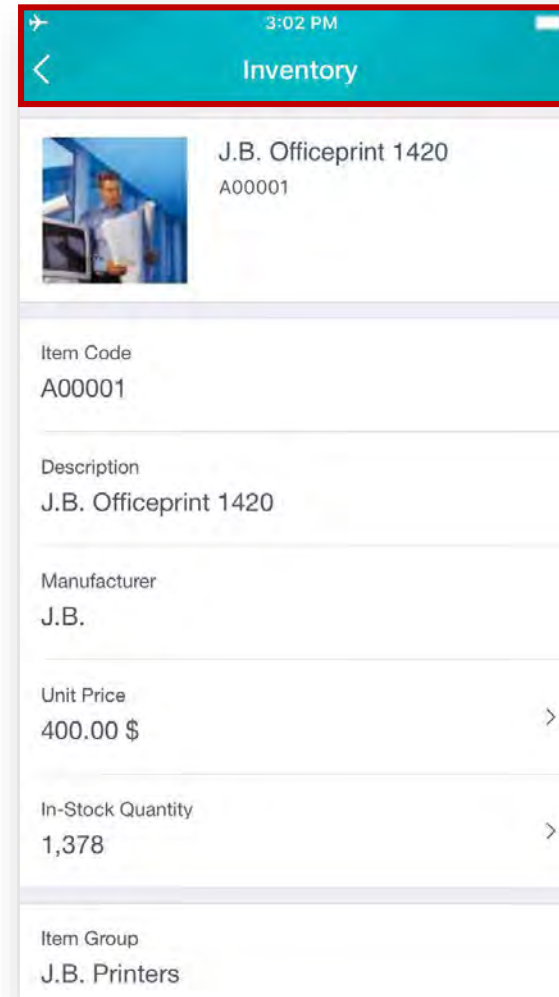
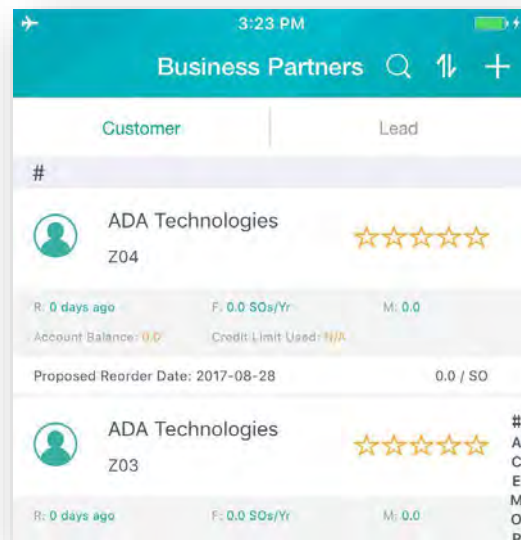
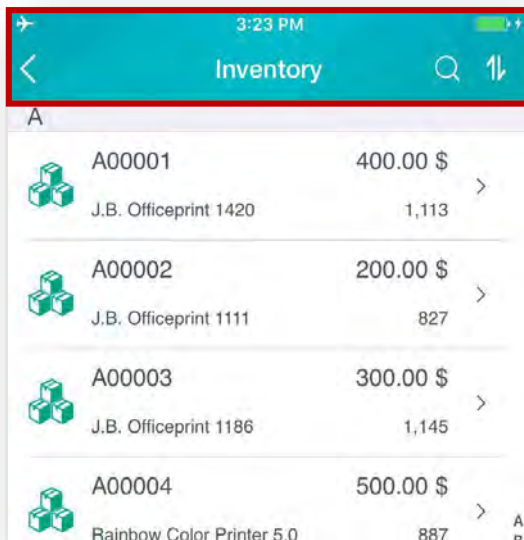
- Business Partner & Items details can be downloaded in batches and viewed in offline mode.
- Large numbers of business partner data and items are able to be synchronized to your local mobile device easily.



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:

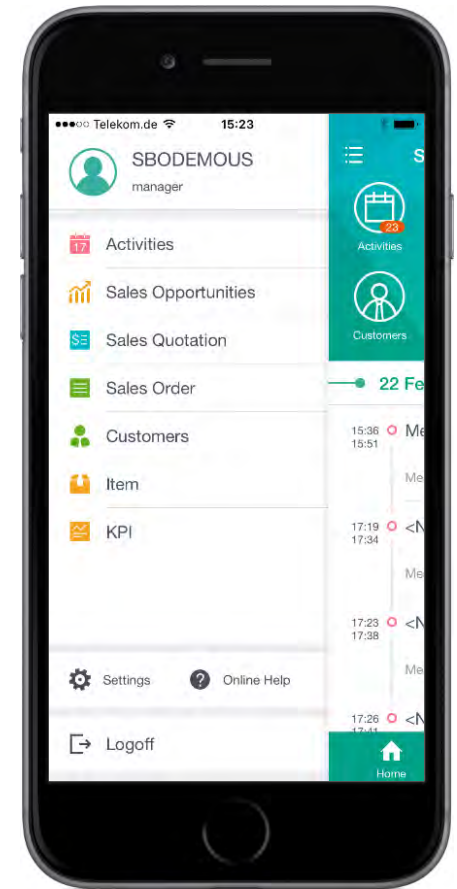
[SAP Business One sales app](#)



SAP Business One Sales for iOS



SAP Business One Sales for Android



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