



**PARTNER SOLUTIONS:CRM FOR OUTLOOK**

Run SAP Business One from Outlook

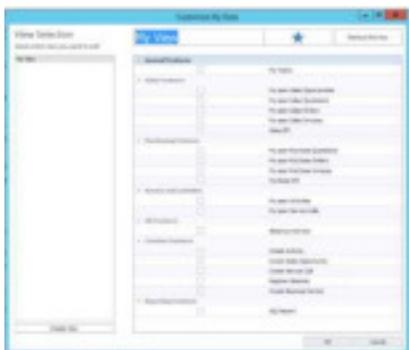
# Run SAP Business One from Outlook CRM for Outlook

With CRM for Outlook you have complete Outlook integration for SAP Business One.

CRM for Outlook provides instant access to essential information and makes it easy to perform SAP Business One tasks from within in Outlook, enabling employees from all departments to respond swiftly and accurately to leads, customers and suppliers.

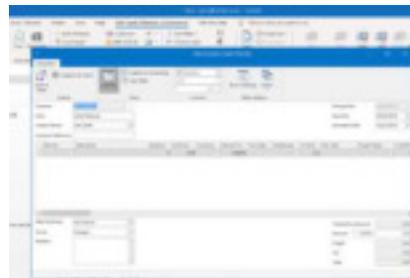
Successful companies excel at establishing meaningful relationships with their business partners, whether they're leads, customers and suppliers. Even companies with irresistible products and services can fail if they don't make and maintain the right connections. After all, deals are closed by people interacting with each other and forging trusted working relationships.

One-time customers won't make your company grow. Leading a business to success relies on gathering a base of loyal and satisfied customers and building solid relationships with suppliers is equally as important. CRM for Outlook is the ultimate solution for developing great relationships inside and outside your business, delivering the key benefits which will drive your company to achieve outstanding results.



## Sell More

Close your deals - *Create and track sales opportunities driving their progress through each sales cycle stage.*



Manage your activities - *Follow up on sales opportunities, never letting them get cold.*

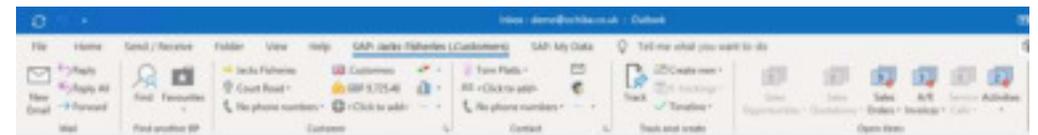
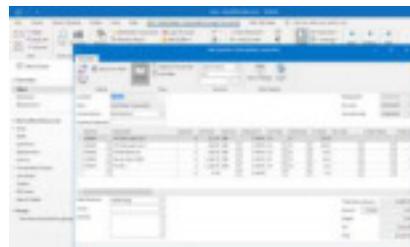
KPIS's & Charts - *Keep track of your progress with out-of-the box sales widgets.*

Mailchimp & Google Maps Integration - *Create email lists for marketing campaigns with B1 MailChimp. View the location of business partners' addresses & get directions.*

## Increase Productivity

Stay in Outlook - *Work from the familiar Outlook environment, saving time and enabling users to get up and running quickly.*

Create SAP documents - *Use Outlook to add or update sales documents, activities, service calls and business partners' records & to view purchase documents and invoices.*

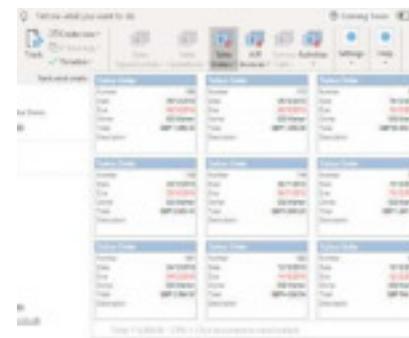


SAP context-sensitive tab & MyDATA tab - *Access all relevant information about business partners in one place. Quickly manage activities, documents & reports from your personal tab.*

Make calls - *Conveniently call to SAP Business One contacts using VoIP applications such as Skype.*

## Organise Your Work

Calendar synchronisation - *SAP Business One activities and Outlook calendar entries always in sync.*



To do list - *Work proactively by always knowing what to do next.*

Timeline - *Keep track of your progress with out-of-the box sales widgets.*

Work on the go - *Use Outlook to access SAP Business One data, just by having an internet connection.*

## Enhance Team Collaboration

Email tracking - *Link important emails to SAP Business One records, providing your team with a history of all communications.*

Report absences - *Let others know when you're not available or see all absentees in your organisation.*

Share files - *Attach files to SAP Business One using integrations with Dropbox, Amazon S3 or FTP.*

Teamwork - *Keep all employees up to date through company-wide access to CRM For Outlook.*

## Find The Right Information

Shortcuts to SAP - *Navigate to documents and reports in SAP Business one with a single click.*

Custom Reports - *Run your own reports and charts from B1 Usability Package.*

Clue-cards - *A handy summary of open SAP Business One items.*

Search tool - *Look up throughout SAP Business One for contacts, emails, phone numbers, addresses and more.*

Data sources - *Get data from multiple SQL or HANA databases.*

## Maximise your CRM Capabilities

Manage all of your sales and service processes - from lead to account management, through reporting, invoicing and service calls - from one easy to use and familiar place:

## Outlook

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