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Client Relation Management with SAP B1 Implementation by Terry Littrell

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In Data Processing, SAP is an acronym for Systems Applications Products. SAP B1 ERP has integrated CRM (Client Relation Management) functionality for which you can purchase named user licenses at half of the normal user license rate. Client Relation Management business methodology stereotypically fits the your sales employees as any typical business office is engaged in working in Sales department, CRM licenses which may help budget in Software Purchasing and implementing. We may now review the functionality:

The key to CRM object is opportunity. The opportunity might be assigned to either Customer Business Partner or Lead Business Partner which includes activities such as phone calls, meetings, task, note or others. The opportunity can be associated with Partner Channel, or if you sell SAP products then you can associate them with SAP BO product line (SAP Business One can make a partner for opportunities). You may also associate the opportunity with a competitor, for instance, Microsoft Dynamics. For this opportunity you can choose existing or create a new quotation or sales now, and in such cases you can update opportunity budget from order or quote.

There are many Opportunity phases and stages. The open phase by default creates a new opportunity. Then as you go with your sales cycle you can move it won or lost phase. In CRM setup you define opportunity stages with estimated closing percentage at each stage. You enumerate stages or move back to the previous ones. Following the quotation stage and negotiation is a good example. It is also possible to move back from quotation to further additional negotiation.

Related Documents are quotes and sales orders. If you have multiple re-negotiation steps you may associate multiple sales documents to the same opportunity and every time you can update budgets and plus closing estimated percentages.

Reporting is sophisticated and at the same time very intuitive, is what you can normally expect from SAP BO. Besides standard reporting it is better to practice or establish to practice SAP B1 unique drag-and-relate technology which is a remarkable feature, resembling data mining and warehousing.

CRM being another aspect of SAP has companies eager to get their employees trained in the same. SAP CRM covers an overall over some specific areas. SAP CRM training can be completed in the shortest period of time. SAP Consultants will guide you through with the CRM training and learning process as much as possible.

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Terry Littrell - About Author:
The author writes about a SAP Integration with CRM. Discussing the various aspects that go into the process of CRM functionality. a SAP consultants are also available to guide you in the same.

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