COSIB

CRM FOR OUTLOOK

GREAT RELATIONSHIPS OUTSTANDING RESULTS WITH CRM FOR OUTLOOK

- SELL MORE
- INCREASE PRODUCTIVITY
- ORGANIZE YOUR WORK
- FIND THE RIGHT INFORMATION
- ENHANCE TEAM COLLABORATION

Grow your business by building strong connections with people that matter

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.

"CRM FOR OUTLOOK IS THE PERFECT CRM INTEGRATION TOOL."

"You can access the right data in just a few seconds directly in Outlook."

Benny Brand, Consultant

Connect your business to people

Successful companies excel at establishing meaningful relationships with their business partners, whether they're leads, customers or suppliers.

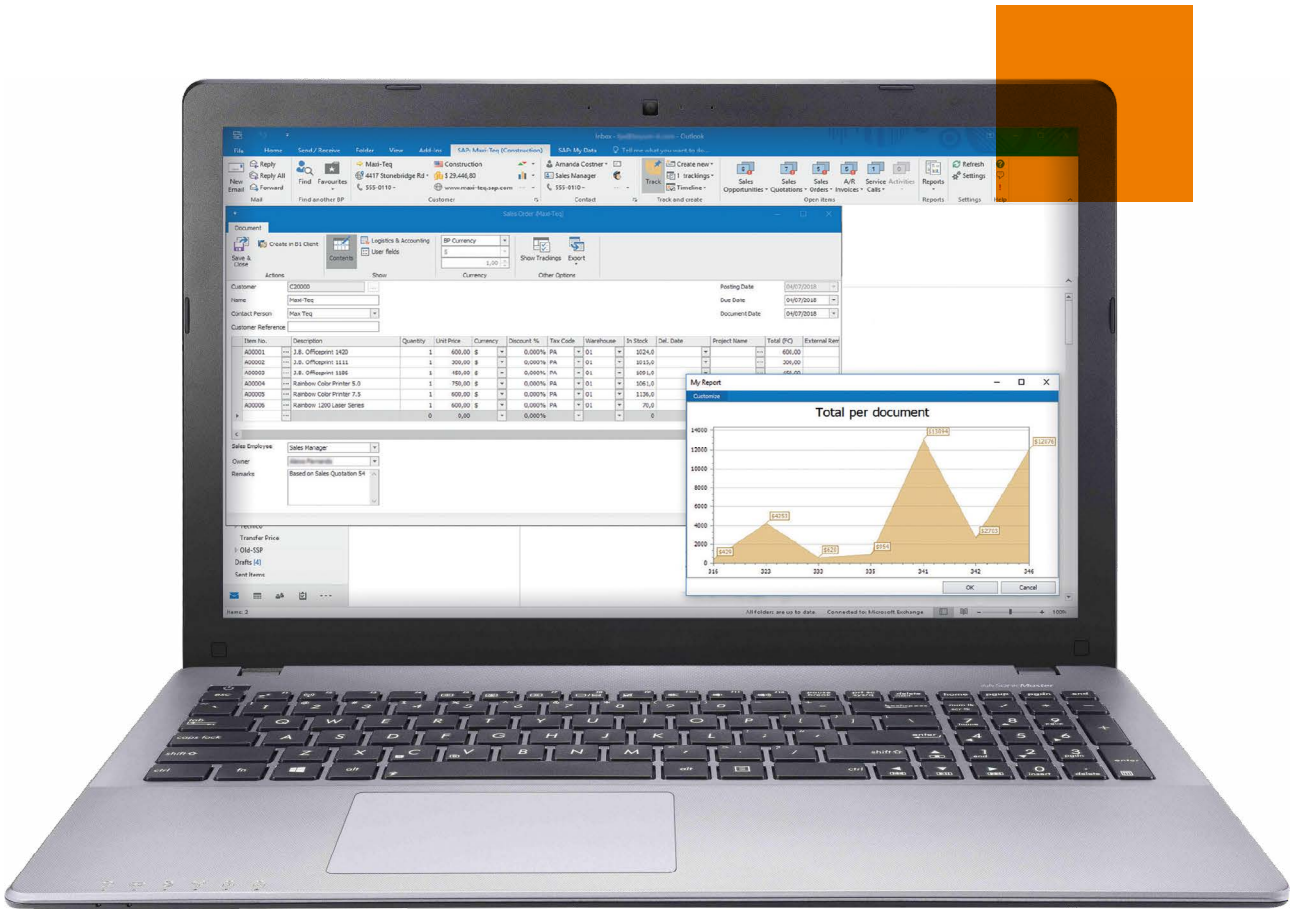
Even companies with irresistible products and services can fail if they don't make and maintain the right connections. After all, deals are closed by people interacting with each other and forging trusted working relationships.

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.

Your company needs to provide a flawless experience to its business partners at every step of the way, and the key principles for success are:

1. **Instant access to accurate information**
2. **Respond quickly to business partner requests**

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.



Key benefits and features

SELL MORE

CLOSE YOUR DEALS

Create and track sales opportunities, driving their progress through each sales cycle stage.

MANAGE ACTIVITIES

Follow up on your sales opportunities, never letting them get cold.

KPIs and CHARTS

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

MAILCHIMP INTEGRATION

Easily create email lists for your marketing campaigns using B1 MailChimp.

ORGANIZE YOUR WORK

CALENDAR SYNCHRONIZATION

SAP Business One activities and Outlook calendar entries always in sync.

TO DO LIST

Work proactively by always knowing what to do next.

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.

CUE-CARDS

A handy summary of open SAP Business One items.

TIMELINE

View recent interactions with customers and suppliers.

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 data-bases.

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 and to view purchase documents and invoices.

SAP CONTEXT-SENSITIVE TAB

Access all relevant information about business partners in one place.

MyDATA TAB

Quickly manage your activities, documents and reports from your own personal tab.

GOOGLE MAPS INTEGRATION

View the location of business partners' addresses and get driving directions on the fly.

MAKE CALLS

Conveniently call to SAP Business One contacts using VoIP applications such as Skype.

WORK ON THE GO

Use Outlook to access SAP Business One data, just by having an Internet connection.

ENHANCE TEAM COLLABORATION

TEAMWORK

Keep all employees up to date through company-wide access to CRM FOR OUTLOOK.

EMAIL TRACKING

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

SHARE FILES

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

REPORT ABSENCES

Let others know when you're not available or see all absentees in your organization.

Get more benefits by using our integrated solutions

B1 USABILITY PACKAGE

B1 MAILCHIMP

Next steps...

1 GET MORE INFO

Browse to the product page

2 TAKE A LOOK

Watch a demo video

3 TRY IT OUT

Get your free 20-day trial license

4 MAKE IT HAPPEN

Grow your business

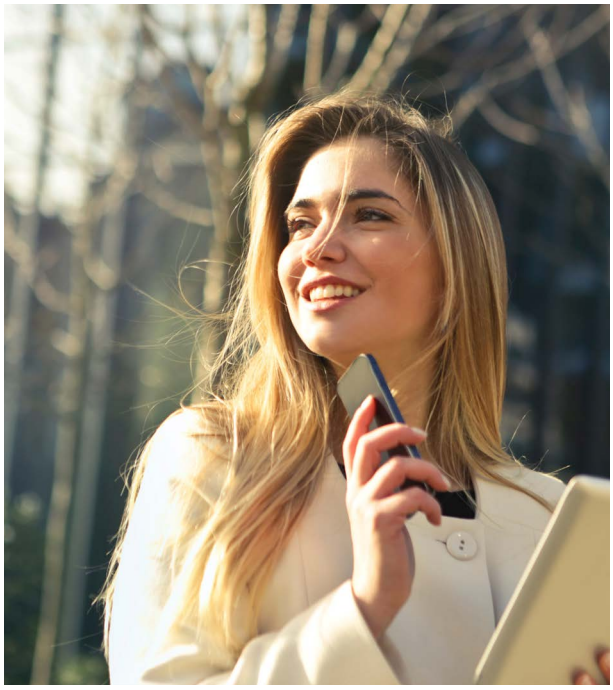
boyum-solutions.com/crm-for-outlook

Your voice matters

We design solutions for people. Join our community now!

Collaborate with product suggestions and vote for the feature requests you most like.

boyum-solutions.com/community



Industry leading solution provider

Boyum IT is the largest and best-known global software solution partner for SAP Business One. We are a member of the SAP Partner Solution Council and are honored to have received more than 20 SAP awards. Among these are the SAP Global Solution of the Year Award and People's Choice Award, which we received for the last 3 years.

We have the largest partner and customer ecosystems, with a presence in more than 110 countries and over 8,700 customers and 200,000 users.

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Company name

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