



WEB CRM ONE 2.0

INTELLIGENT & SOCIAL BUSINESS SYSTEM

SAP® Certified
SAP Business One Integration

Contact Management

- ✓ **Management of Business Partners and their contacts.**
 - ▶ Recording of new clients or prospects.
 - ▶ Research and modification of a Business Partner.
 - ▶ Management of contacts and addresses of Business Partners.
 - ▶ Synchronization of contacts between CRM and Outlook.
 - ▶ Visualization of Customers Open Balance.
 - ▶ Management of SAP® Business One authorizations, (management of credit limit).
- ✓ **Activities Management.**
 - ▶ Creation of a new activity (phone call, meeting, task, remarks etc.).
 - ▶ Research and modification of a new activity.
 - ▶ Scheduling of activities in the calendar.
 - ▶ Visualization of the agenda according to day/week/month.
 - ▶ Synchronization of appointments between CRM and Microsoft Outlook.

Sales Force Automation

- ✓ **Opportunity Management.**
 - ▶ Creation of a new sales opportunity.
 - ▶ Research and modification of an opportunity.
 - ▶ Creation of new stage according to the various phases of the opportunity.
 - ▶ Possibility to create documents, (quotations, sales orders) directly from the opportunity or to link them to it.
 - ▶ Possibility to generate activities from the opportunity itself.
- ✓ **Sales document Management.**
 - ▶ Creation of a new quotation or sales order.
 - ▶ Possibility to save document as drafts.
 - ▶ Documents research.
 - ▶ Total and partial transformation of one or more quotations into a customer order.
 - ▶ Verification of the warehouse availability in real time.
 - ▶ Generation of documents in PDF format.
 - ▶ Management of documents approval processes defined in SAP® Business One.
 - ▶ Sending of documents via email (send in one click).
- ✓ **Management of Sales Budget**
 - ▶ Creation of more budget scenarios according to various periods.
 - ▶ Management of budget per each sales person based on customers, Items, ordered or turnover.
 - ▶ Monitoring of general results or per each sales representative.

Social Media

- ▶ Personalized research of contacts registered in at least a Social Network.
- ▶ Visualization of Social Profiles, their conversations and followers.
- ▶ Advanced research of contacts on all Social Network where they are enrolled.
- ▶ Direct sending of messages to social profiles and creation of the relative activities.
- ▶ Sending of friendship request messages and creation of relative activities.
- ▶ Authorization request for the access to RTS Social Media Service.

Georeferencing (Google Maps)

- ▶ Georeferencing of Business Partners addresses.
- ▶ Georeferencing of Business Partner by address, area, typology, Product Sector.
- ▶ Road calculation to reach day appointments places.

Marketing

- ▶ Management of multichannel campaigns.
- ▶ Management of multichannel messages sending.
- ▶ Analysis of sent messages reports.
- ▶ Management of distribution list.
- ▶ Management of multichannel messages model.

Management of commercial organization

- ▶ Management of professional profiles.
- ▶ Management of user and user group.
- ▶ Assignment of user roles.
- ▶ Management of data visibility according to user roles.

Advanced research (superQuery)

- ▶ Creation of research filters per user or group of users.
- ▶ Creation of result views according to the user needs.
- ▶ Customizable Dashboard and Drill Down analysis.
- ▶ Customizing of application dictionaries and definition of analysis universes.

Other functionalities

- ▶ Research results exportation to Microsoft Excel.
- ▶ Multilanguage management (Italian, English, French, German, Spanish, Chinese).
- ▶ Customizable reports through Crystal Reports.
- ▶ Customized Template management.
- ▶ SAP® Business One messages management.
- ▶ Creation and management of user fields.
- ▶ Personalization of menu voices.



SAP Business One

PARTNERSHIP

RUN TIME Solutions si avvale di importanti partnership per la realizzazione di soluzioni di successo per l'impresa:

