



CRM FOR  
OUTLOOK

# GREAT RELATIONSHIPS OUTSTANDING RESULTS WITH CRM FOR OUTLOOK



**SELL MORE**



**INCREASE PRODUCTIVITY**



**ORGANIZE YOUR WORK**



**FIND THE RIGHT INFORMATION**

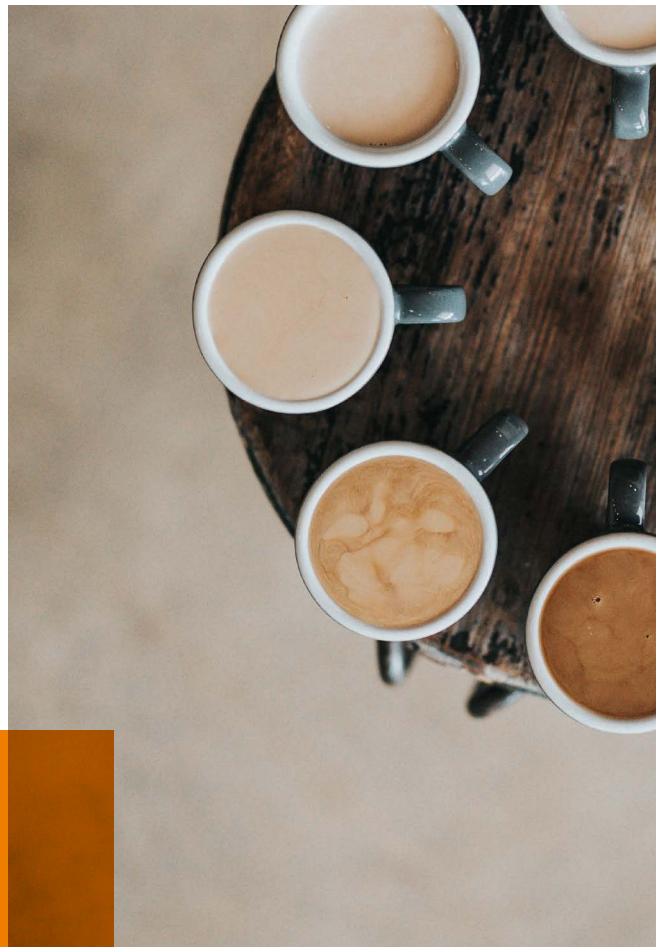


**ENHANCE TEAM COLLABORATION**

# Grow your business by building strong connections with people that matter

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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.

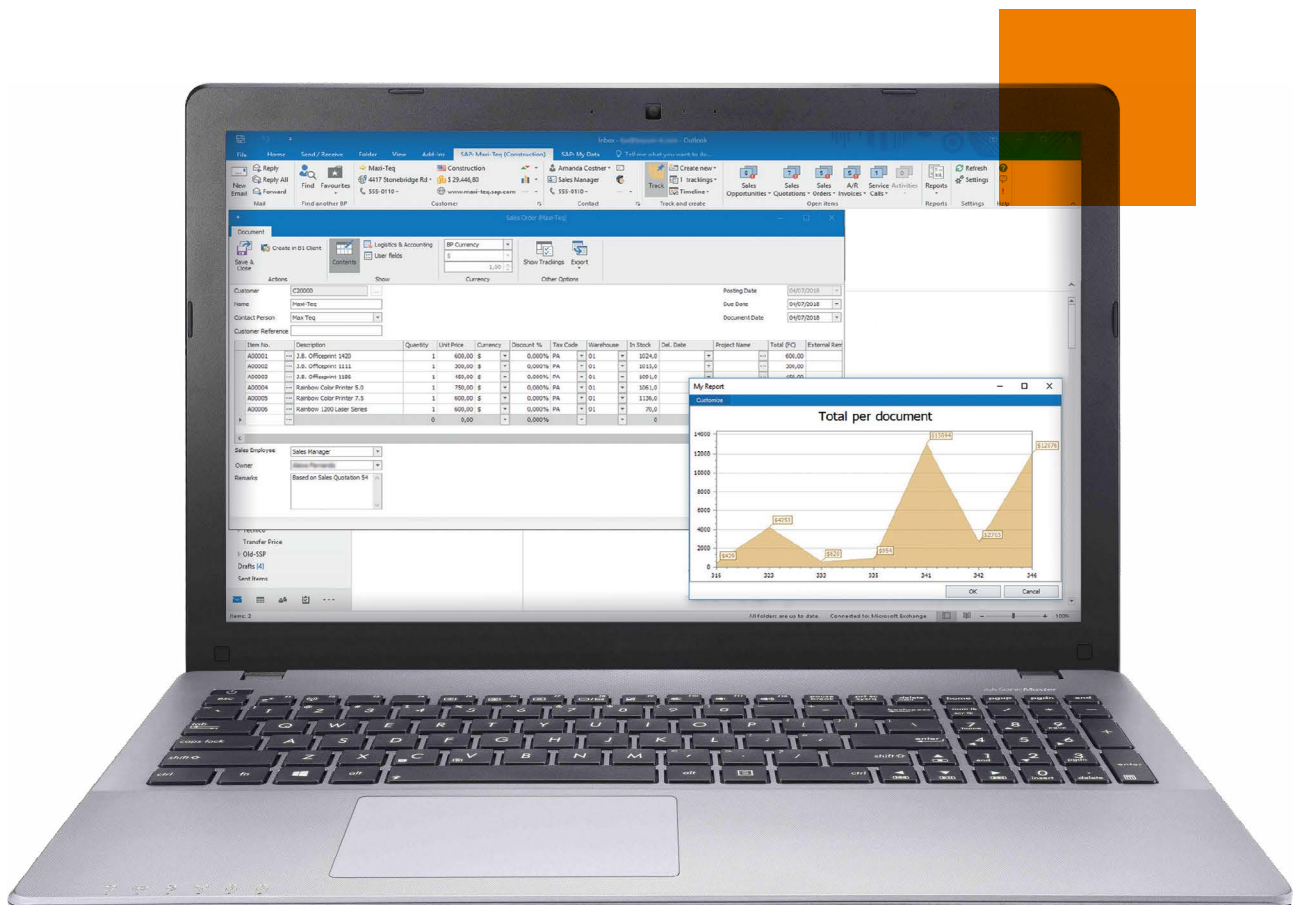
Even companies with irresistible products and services can fail if they don't make and maintain the right connections. After all, deals are closed by people interacting with each other and forging trusted working relationships.

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**

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## **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.



## **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 databases.



## **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.



## **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**

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**B1** USABILITY  
PACKAGE







**B1**  
MAILCHIMP



# Next steps...

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<b>1</b> GET MORE INFO	<b>2</b> TAKE A LOOK	<b>3</b> TRY IT OUT	<b>4</b> MAKE IT HAPPEN
Browse to the product page	Watch a demo video	Get your free 20-day trial license	Grow your business
			

[boyum-solutions.com/crm-for-outlook](https://boyum-solutions.com/crm-for-outlook)

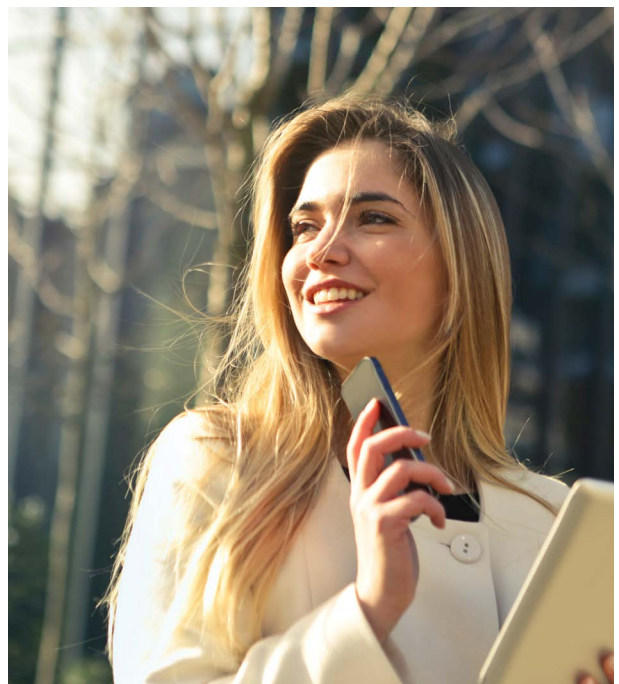
## Your **voice** matters

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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](https://boyum-solutions.com/community)





# Industry **leading** solution provider

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Boyum IT Solutions is today the global leading software solution provider in the SAP Business One ecosystem and 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 4 years.

We have the largest partner and customer ecosystems, with a presence in 115 countries and just over 9,000 customers and 200,000 users.



+39 051 622 9711



marketing@macro-one.com



www.macro-one.com



Via Enrico Mattei, 102 - 40138 Bologna