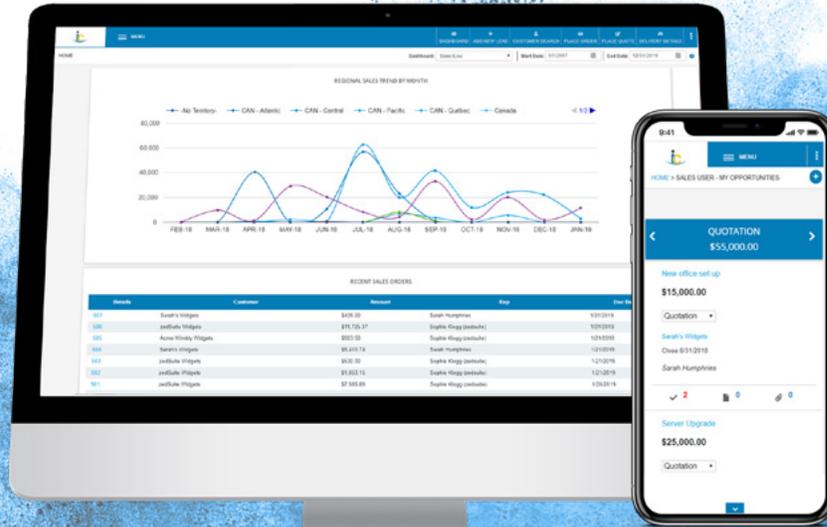


CRM Made Simple

# SALES USER FOR EMPLOYEE PORTAL



Without visibility into your sales pipeline, it's difficult to forecast revenues and make strategic business decisions. Your salespeople are a crucial link between your customers and your business, providing that visibility into your sales pipeline. At their best, they're selling, closing deals, placing orders, and servicing your customers in the field. What if you could empower them to communicate crucial details in real-time?

Sales User for Employee Portal allows your sales representatives to work from their mobile devices. With immediate access to SAP Business One data, they can be informed about business opportunities, prepare quotes, enter sales orders, view reports, and manage contacts and leads while on the go.

Empower your sales team to move opportunities through the pipeline, change the sales values, manage their daily tasks, and drill down for more detail – directly from their mobile device.



# Features

## **Create, Edit, and Cancel Sales Orders and Quotes in Real-Time**

Salespeople can use any internet-connected device to submit sales orders and quotes to SAP Business One in real-time, with advanced features like adding text and subtotal lines, configurable price overrides, and discount options.



Add text and subtotal lines to sales orders and quotes and breakdown products versus service pricing for easier quote comprehension. Add activities and attachments to sales orders and quotes and edit/cancel open sales orders and quotes.



## **Manage the Sales Opportunity Pipeline**

Monitor your sales pipeline's health on the fly via the opportunities board. Update high-level information such as activities and attachments or drill into the details to give special attention to each opportunity.

## **Display Key Data Points with Configurable Fields for Business Partners, Contacts, and Opportunities**

Customize key data fields to show details relevant to you and hide details that don't add value to your business.



## **Manager-Level Controls**

Managers can add sales orders and quotes on behalf of a salesperson's report, allowing for seamless sales coverage if team members are absent.

# Benefits Provided to Customers



## Increase Data Security

Secure data by providing targeted access to sales representatives and management and showing people only the data they need.

## Support for Multiple Mobile Devices

Responsive design offers sales users an optimal viewing and navigation experience across a range of mobile devices.

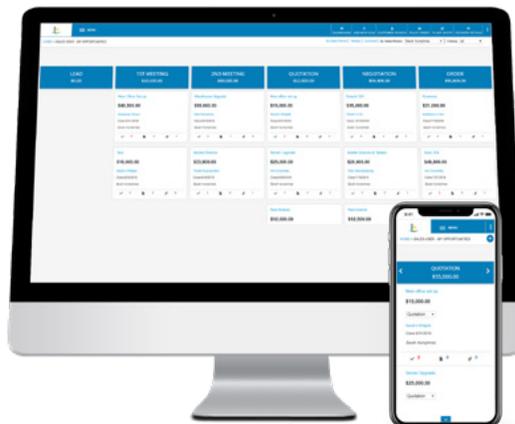


## Up-to-the-Minute Data Access

Get secure access to real-time SAP Business One sales-related query reports anytime, anywhere, so your salespeople and head office are in sync.

## Subscription Bundle

Includes hosting and software for a rapid, straightforward software deployment that gets you up and running quickly, with no additional software required.





Vision33 Inc. is a global IT professional services consultancy that solves customer business challenges through the promise of technology and the value it delivers. We partner with growing and large organizations in both the public and private sectors to understand their vision and help them reach it with the right blend of strategy, consulting, and technology. Vision33 global team of results-driven resources provides world-class experience through our office locations in North America and Europe. For more information about Vision33, visit [www.vision33.com](http://www.vision33.com).

## Take the Next Step and Learn More

Learn how Sales User for Employee Portal can enable your sales team to take advantage of opportunities whenever and wherever they happen. Visit [www.vision33.com/products/employee-portal](http://www.vision33.com/products/employee-portal) for more information or contact a qualified Vision33 consultant by email at [contact@vision33.com](mailto:contact@vision33.com) or by phone at one of the numbers listed below.

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