

**CRMFlow**

CRM FOR SAP BUSINESS ONE

A full CRM, with **SAP Business One** as the master.

CRMFlow gives sales and marketing the CRM they expect — leads, lifecycle stages, a pipeline board, quotes, activities, sequences and email campaigns — built on SAP Business One instead of beside it. Business partners, contacts, opportunities, quotations, activities and campaigns are the B1 records themselves, so nothing is retyped and B1 stays master. It is in development: the sales and marketing core runs in the current build against a simulated SAP Business One, and has not yet been verified on a live Service Layer.

THE PROBLEM

Sound familiar?

SAP Business One has no place for a prospect that is not a business partner yet.

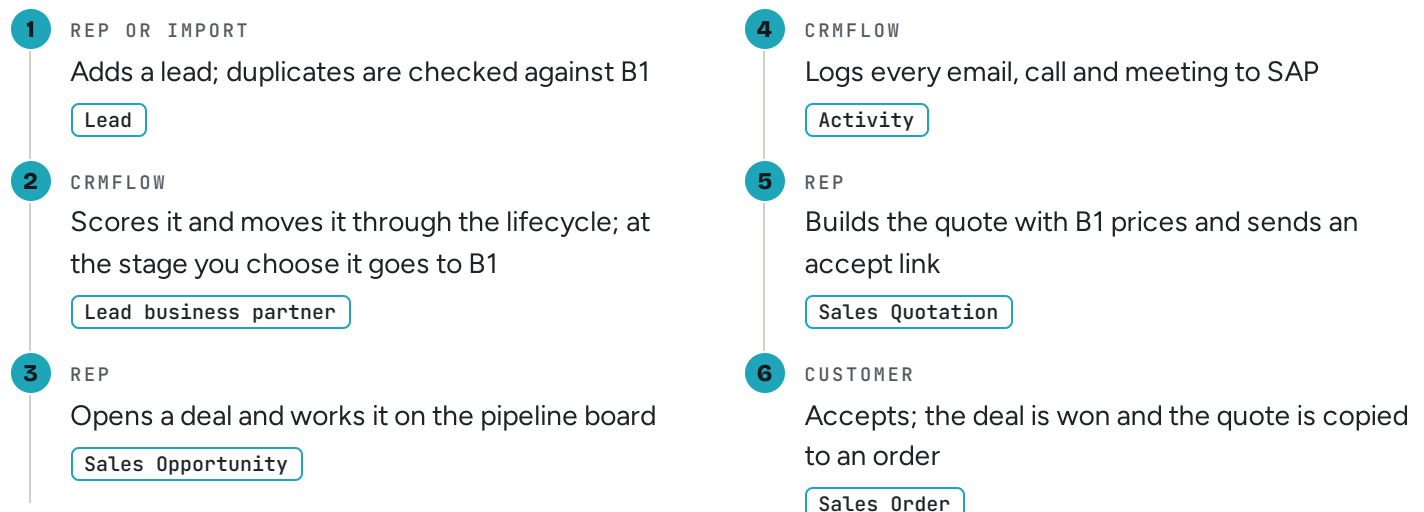
Emails and meetings stay in each rep's mailbox, so nobody sees the last conversation.

Reps keep deals in a separate CRM, then retype the customer and the quote into B1.

Campaign results never reach B1, so no one can tie a campaign to the revenue it brought.

HOW IT WORKS

Step by step, inside SAP Business One



Everything CRMFlow does

Accounts & contacts

- ✓ Customers, leads, contacts, addresses and sales employees synced from every B1 company database; one install spans several companies
- ✓ Business partners linked across company databases by tax ID, web domain or name, into one customer 360
- ✓ Ownership from the B1 sales employee: reps see their own and their team's accounts, managers their team's
- ✓ Every change to a B1 field kept in the record history

Pipeline & quotes

- ✓ Deals are B1 Sales Opportunities, on a pipeline board per company built from its B1 sales stages
- ✓ Stage gates, rotting alerts, and won and lost reasons from B1
- ✓ Forecast per owner and month: open, weighted, commit and won, split by currency
- ✓ Quotes priced from B1 and created as native B1 Sales Quotations, with a PDF, an accept link and copy to Sales Order

Marketing

- ✓ Email campaigns through Postmark or SendGrid, with templates, lists and rule-based segments
- ✓ Consent enforced per contact for CAN-SPAM, CASL, GDPR and Mexico's LFPDPPP, with unsubscribe and a consent log
- ✓ Each campaign mirrored to a B1 Campaign, with every business partner's response
- Next release: embeddable forms, landing pages, website tracking with UTM attribution, and company enrichment

Leads & lifecycle

- ✓ Leads and prospect contacts that live in CRMFlow until they are qualified, with owner, source and score
- ✓ Lifecycle stages from Subscriber to Customer, each explained on screen: what it means, how it is reached, what it does in SAP
- ✓ You choose the stage that creates the B1 Lead business partner; the first quotation makes it a Customer
- ✓ Duplicate checks against CRMFlow and B1 before anything is created, a merge tool, CSV/Excel import and rule-based scoring

Activities & mailboxes

- ✓ Calls, meetings, tasks, notes and emails written to B1 Activities, on a timeline and in My day
- ✓ Microsoft 365 or Google mailboxes and calendars, or a BCC address, log email with known contacts
- ✓ Sequences of emails, calls and tasks that stop on a reply or a booking, and a booking link per rep

Service, AI & more

- Planned: help desk tickets on B1 Service Calls, with SLAs, a knowledge base, a customer portal and site visits handed to FieldFlow
- Planned: workflow builder and AI drafting, summaries, scoring and next-best-action, reusing InboxFlow's email reading
- Planned: click-to-call, VoIP, Teams and Zoom, SMS and WhatsApp, logged to B1 Activities
- Planned: reports joined with B1 invoiced revenue and margin, a SAP B1 Web Client tile, a mobile app and Outlook and Gmail add-ins

WHAT YOU GET

Built for B1, not bolted on

- ✓ Accounts and contacts from every B1 company, B1 as master (current build)
- ✓ Leads, lifecycle stages, scoring and push to a B1 Lead (current build)
- ✓ Pipeline on B1 opportunities, forecast and B1 quotations (current build)
- ✓ Activities in B1, mailbox logging and sequences (current build)
- ✓ Campaigns with consent rules, mirrored to B1 Campaigns (current build)
- ✓ Forms and web tracking (next release); service and AI (planned)

WHO USES IT

Sales reps

Sales managers

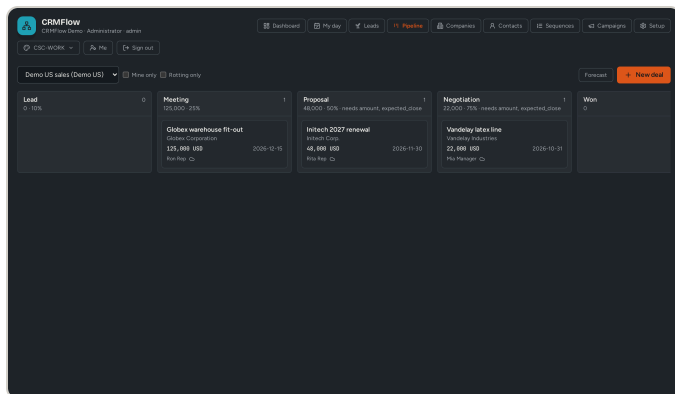
Marketing

Sales operations

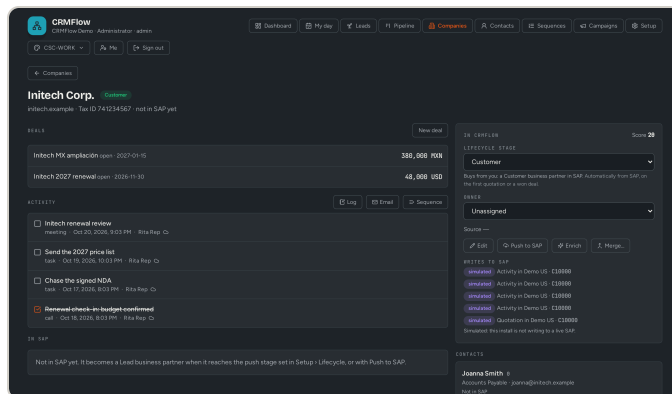
WHO IT FITS

Distributors, wholesalers, manufacturers and service companies on SAP Business One (HANA or SQL Server, 10.0 FP2108 or later) that sell through a sales team — in one company or several.

INSIDE CRMFLOW



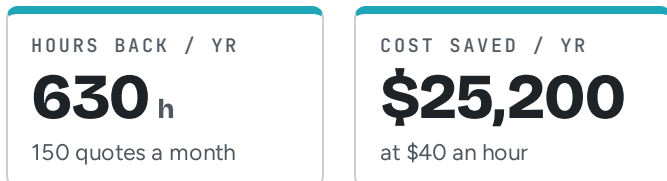
In development: the pipeline board by B1 sales stage (demo data)



In development: a customer 360 with deals and activities (demo data)

Screens shown with demo data from fictional companies. Some screens show features still in development.

THE BUSINESS CASE



Illustrative example from the calculator on the product page, with its default inputs. Put in your own numbers there.

WHY CSC-WORK

Consultancy work that kept repeating became product. Every Flow product runs on the same foundation — shared licensing, the same SAP Business One Service Layer client, the same design system — so they install alongside each other and share data instead of fighting over it.

Built and supported by SAP Business One developers and consultants, on HANA and SQL Server.

Shape it with us — join the pilot

We are building it with a small group of early customers.

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csc-work.com/products/crmflow/