Factsheet

XFT Sales Manager

www.xft.com/en/product/xft-sales-manager

About XFT Sales Manager

Digitize Sales and Increase Revenue

How effective is your sales department? Within many companies, it is not as effective as it could be. Important sales information is often left unrecorded, lost inside the heads of individuals. This makes teamwork difficult, if not impossible.

XFT Sales Manager gives you full control of all SAP sales processes. Every activity – from customer meetings and ordering, to delivery and invoicing – is recorded within the digital file solution and can be reviewed at any time. Your sales experts can view information about every customer's wants and needs – turning one-time buyers into long-term customers.

Overview of Features

Sales Transaction

- Create sales transactions in the SAP system with reference to a customer, even without a formal quotation or order. Record important information, documents, and correspondence early on.
- Classify documents with separate document types to make it easier to find them later on. Document types may include specifications, agreements on special conditions, agreed deadlines, quality certificates, requirement and technical specifications, to name but a few.
- Store important dates, meetings, or milestones, for instance, meetings with the customer or the presentation of a quotation.
- Store notes and comments on the sales transaction, documents, deadlines, and so on.
- Assign an existing SAP quotation or order, and/or create a new document directly from the transaction.
- Track the process status, from the acquisition phase, to the quotation and ordering phase, to delivery and invoicing.
- Link to other files related to the sales transaction: customer files, order files, quotation files, and so on.

Customer File

- Store documents and correspondence that are relevant for all sales transactions for a customer centrally, such as cross-order contracts and conditions.
- Branch to the customer master and the customer fact sheet.
- Branch to the customer's current sales transactions.

Quotation and Order File

- Store larger quantities of written documents for a single quotation or order.
- Central location, for example, for precise specifications or requirements or for technical and commercial reviews of the quotation prior to submission.
- Link to the sales transaction.

Cockpit for Sales Transactions

- Search for sales transactions, customer files, quotation and order files, and branch into view or edit mode.
- Maintain favorites (transactions that are being processed intensively).
- Branch to the files last edited via the access history.

Approval Processes

- Use automatic agent determination when starting an approval cycle using the relevant document data (sales area, document type, net value, etc.).
- Display the approval status and the entire cycle from the files.
- Approvals update the status of the SAP sales documents.
- Approval decision can be made on an SAPUI5 interface.

Integration in XFT Product Landscape

- Automatically create quotations from SAP-Data using the XFT Document Composer.
- Display approvals of the Sales Documents, that have been started with the XFT Compliance Cycle.
- The cockpit can be enhanced to integrate the XFT Machine File.

Integration in SAP ERP

- Branch to the SAP document quotation or order or display the details from the file view.
- Display the document items synchronized in the files.
- Store the document-related documents synchronized in the files.
- Update and visualize the document flow in the files automatically, including attachments.
- Upload documents asynchronously into the SAP system using the Upload Manager to document activities once a week and store documents centrally, for example.
- Connect to upstream CRM systems to integrate further information.

Would you like to learn more about our products or see what XFT Sales Manager can do for your business? Contact us today for a live demo!

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