



XFT. Experten für Information.

XFT GmbH · SAP Partner-Port
Altrottstr. 31 · 69190 Walldorf

☎ +49 6227 54555-0

✉ +49 6227 54555-44

hello@xft.com

www.xft.com

Factsheet

XFT Sales Manager

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



SAP Certified
Integration with RISE with SAP S/4HANA Cloud



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 for a live demo!



 +49 6227 54 555 0

 sales@xft.com

© Copyright XFT GmbH, all rights reserved.

No parts of this publication may be reproduced or transmitted without the express permission of XFT GmbH, regardless of the intended purpose. Information contained in this publication may be subject to change without prior notice.

The concepts, graphic designs, and texts contained in this presentation are the intellectual property of XFT GmbH or the companies involved and are protected by copyright as well as the right of use. All rights are reserved by XFT GmbH as well as the companies involved.

Legal Disclaimer

It is impossible to guarantee that a publication is entirely free of errors. XFT therefore reserves the right to change the publication and the information it contains without prior notice. XFT accepts no liability for the correctness, completeness, or current relevance of the information provided. The information in this presentation is confidential and proprietary to XFT and may not be disclosed without the permission of XFT. XFT has no obligation to pursue any course of business outlined in this presentation or any related document, or to develop or release any functionality mentioned therein. The information in this presentation is not a commitment, promise or legal obligation to deliver any material, code or functionality. This presentation is for informational purposes and may not be incorporated into a contract.

Registered trademarks

SAP, ABAP, SAPHIRE, SAP ArchiveLink, SAP NetWeaver, SAP Business Suite, SAP ERP, SAP ERP Corporate Services, SAP Fiori, SAP HANA, SAP S/4HANA, SAP SuccessFactors, SAP Solution Manager, SAP NetWeaver Portal are registered trademarks of SAP SE & Co. KG in Germany and various other countries.

Microsoft, Windows, Outlook, Excel, Word, PowerPoint, and SQL Server are registered trademarks of Microsoft Corporation. Adobe, the Adobe logo, Acrobat, PostScript, and Reader are trademarks or registered trademarks of Adobe Systems Inc. in the USA and/or other countries.

XFT Task Manager 4S4, XFT Task Manager, XFT Compliance Cycle 4S4, XFT Compliance Cycle, XFT Queue Manager 4S4, XFT Queue Manager, XFT Document Composer 4S4, XFT Document Composer, XFT Document Connector 4S4, XFT Document Connector, XFT Personnel File 4S4, XFT Personnel File, XFT Personnel Manager 4S4, XFT Personnel Manager, XFT Zeugnismanager 4S4, XFT Zeugnismanager, XFT Contract Manager 4S4, XFT Contract Manager, XFT Purchase Manager 4S4, XFT Purchase Manager, XFT Confirmation Manager 4S4, XFT Confirmation Manager, XFT Invoice Manager 4S4, XFT Invoice Manager, XFT Billing Manager 4S4, XFT Billing Manager, XFT Sales Manager 4S4, XFT Sales Manager, XFT Project File 4S4, XFT Project File, XFT PPAP File 4S4, XFT PPAP File, XFT Change Manager 4S4, XFT Change Manager, XFT Machine File 4S4, XFT Machine File, XFT Sales Document Cycle 4S4, XFT Sales Document Cycle, XFT Material Creation 4S4, XFT Material Creation are trademarks and product names of XFT GmbH in Germany and/or in other countries.

Unless indicated otherwise, all trademarks used in this publication are protected. This also applies to the company logos and other product names.

© Copyright XFT GmbH, Version 05/2024-2026