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- System R3
- Release 3.00 Customer Relationship Management
- December 2001
- Materialnumber: 50052951

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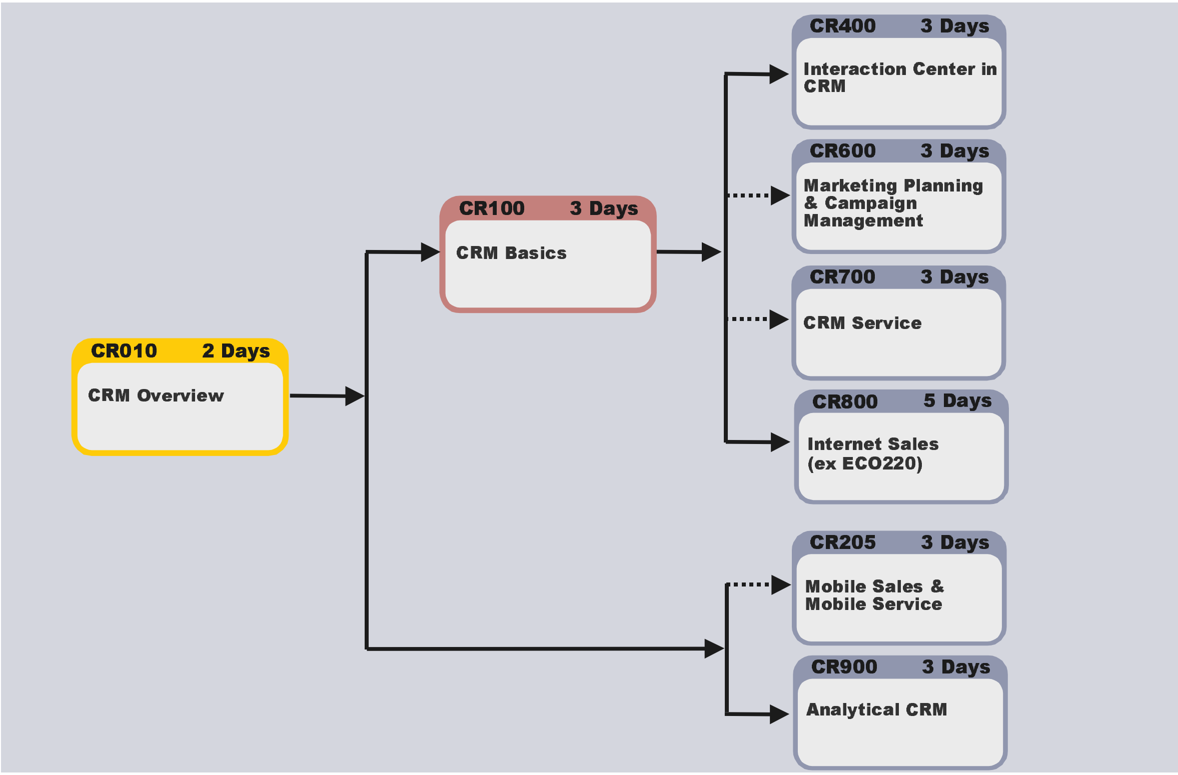
mySAP CRM 1 Col22



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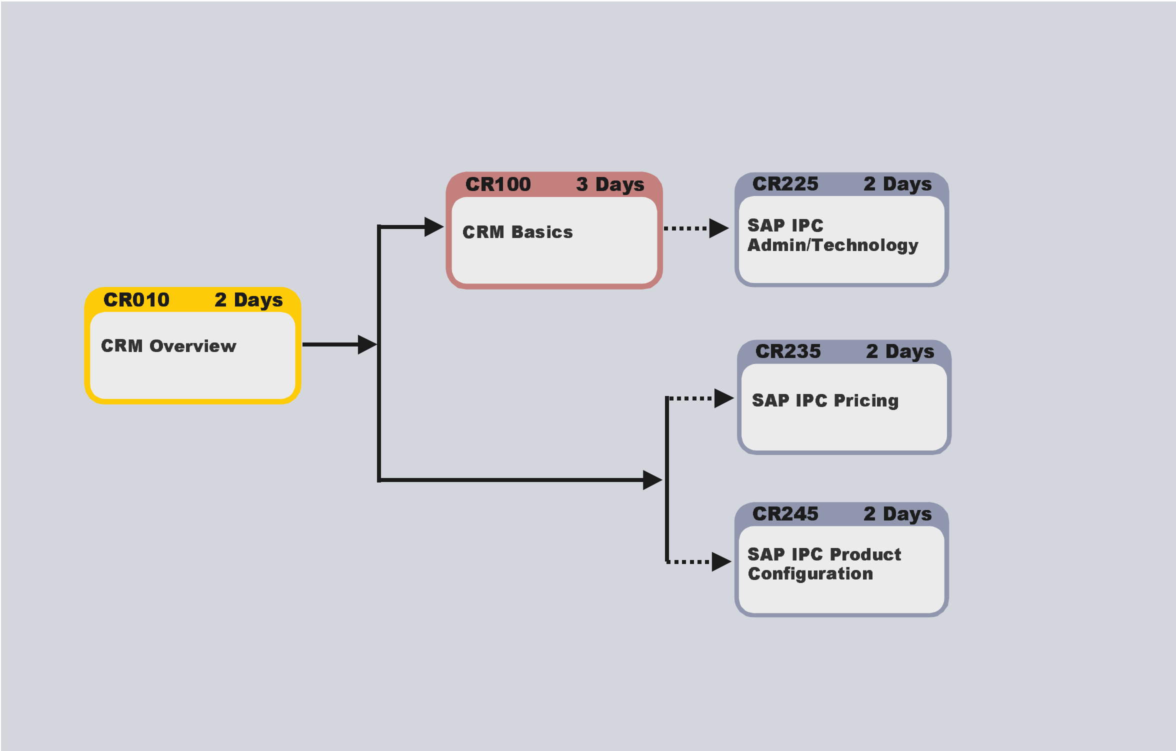
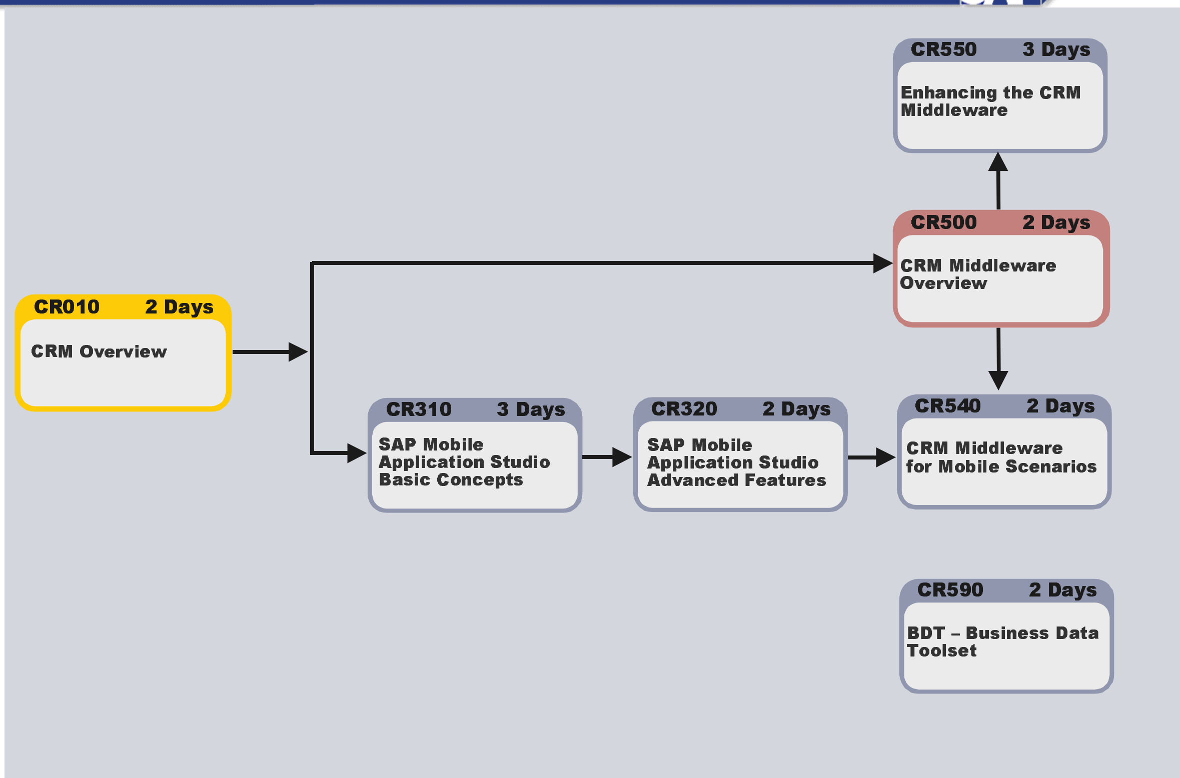
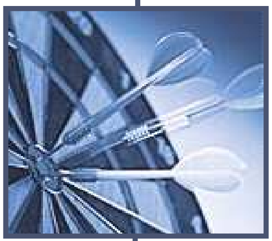
mySAP CRM 2 Col22



mySAP CRM 3 Col22



Course Prerequisites



Required:

- **MS Windows**
- **MS Internet Explorer**

Recommended:

- **SAP20, LO150, LO110**
- **Familiarity with CRM business processes**

- SAP20 R/3 Overview Level 1
- LO150 Sales Order Processing Level 2
- LO110 Customer Service Level 2

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Target Group

Audience:

- Customers interested in gaining an understanding of SAP Customer Relationship Management and it’s related processes
- SAP Consultants and Partners working with CRM Customers

Duration: 2 days

Course Overview

Contents:

- Course Goals
- Course Objectives
- Course Content
- Course Overview Diagram
- Main Business Scenario

Course Goals

This course will:

- Enable you to describe SAP CRM products, roles, and processes
- Provide a fundamental understanding of SAP CRM concepts and products

Course Objectives (1)

At the conclusion of this course, you will be able to:

- Describe the SAP CRM product range
- Describe SAP CRM architecture
- Define basic CRM concepts
- Describe Marketing Planning and Campaign Management functionalities and create a basic marketing plan and campaign

Course Objectives (2)

At the conclusion of this course, you will be able to:

- Define and execute a process within Internet Sales
- Explain different Telesales and Teleservice processes and execute them in the Interaction Center
- Explain Mobile Sales and Mobile Service applications

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Course Content

Preface

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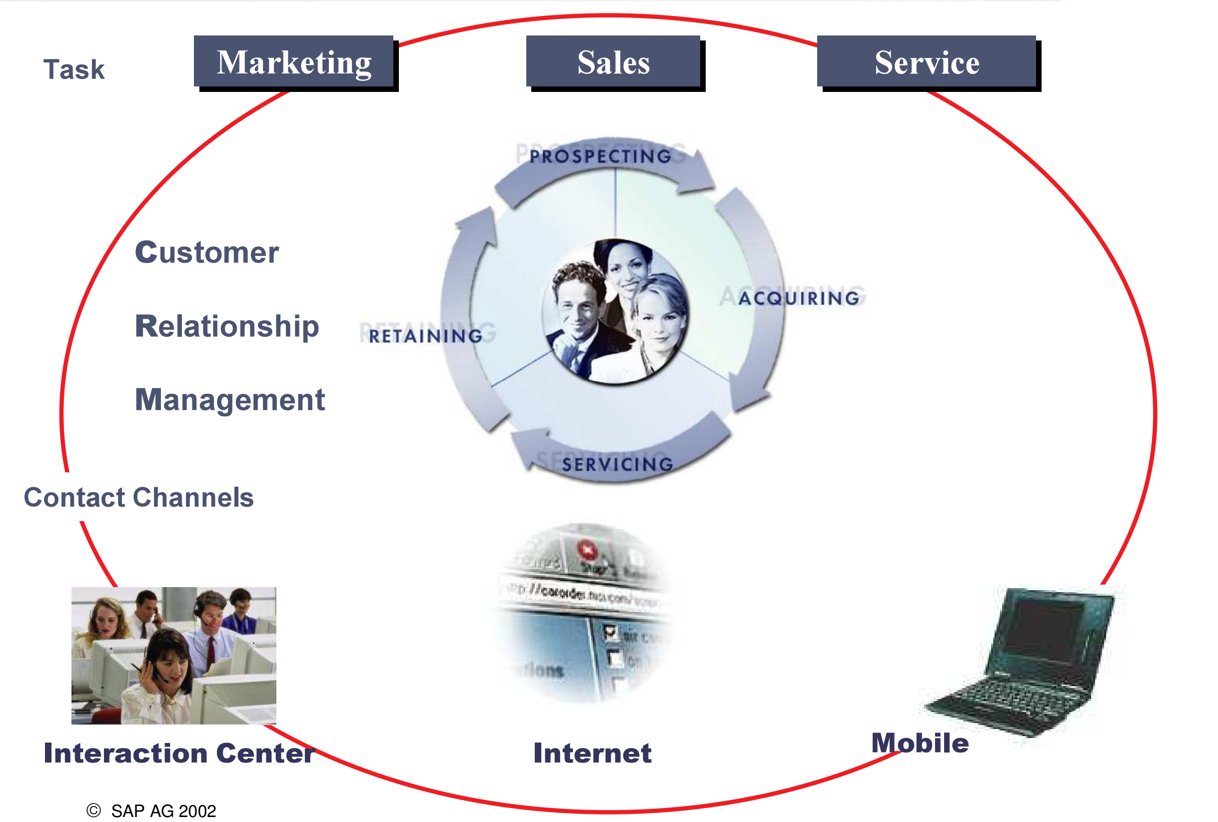
Course Overview Diagram



Main Business Scenario

- Example company IDES Inc. wants to implement the different components in mySAP CRM. One of the project team responsible for implementation would like to gain an overview of the mySAP CRM solution and its functions.

Introduction

Contents:

- Integrated Business Processes Using mySAP CRM
- Contact Channels to the Customer - Traditional Sales vs. CRM CRM
- CRM Performance Analysis
- PC4U mySAP CRM Process Scenario

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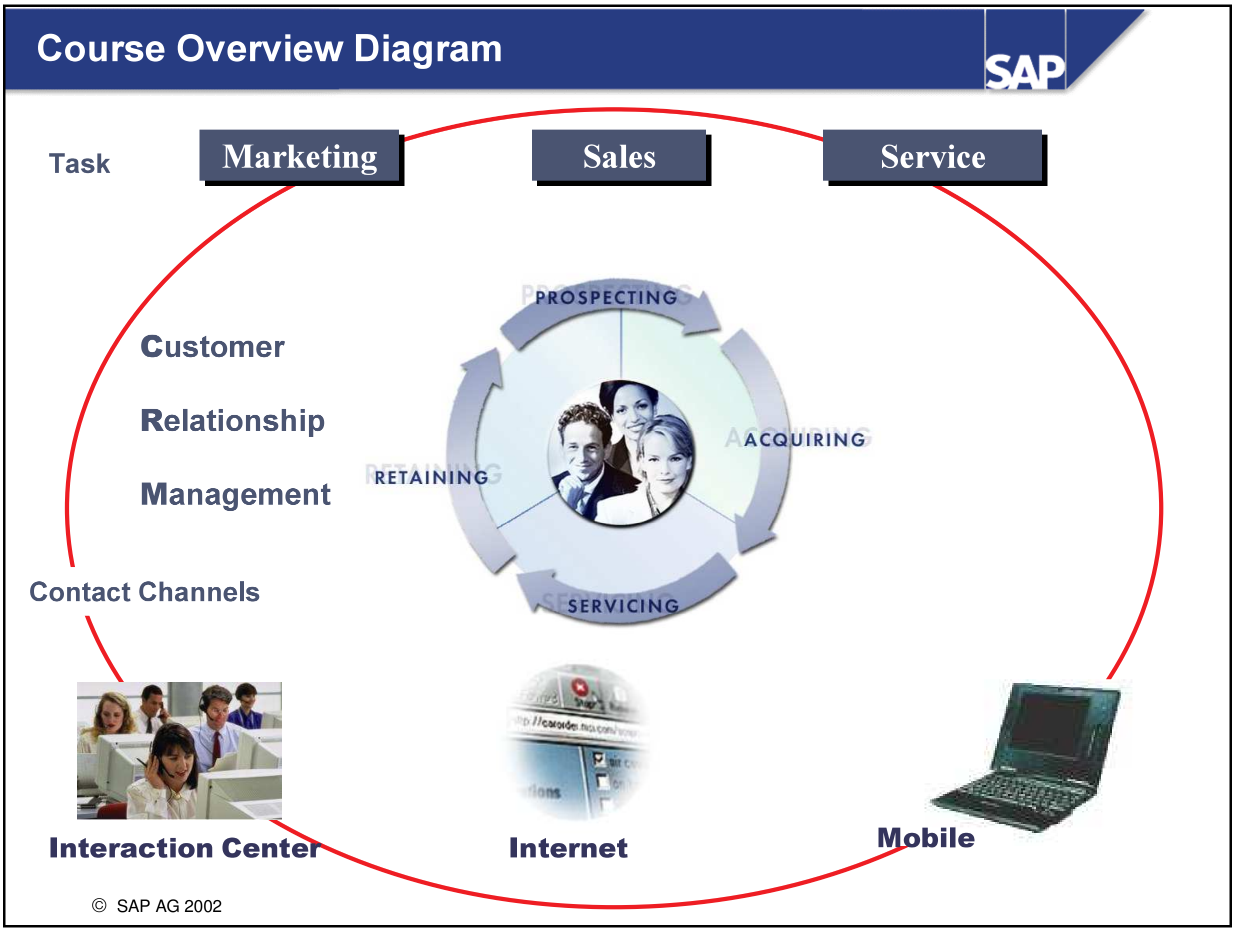
Introduction: Unit Objectives

At the conclusion of this unit, you will be able to:

- **Describe the idea of CRM as a business concept compared to traditional sales, by means of different contact channels to the customer.**
- **Describe the mySAP CRM method of resolution by means of a selected business scenario.**


Course Overview Diagram
SAP
Task
Marketing
Sales
Service
Customer
Relationship
Management
PROSPECTING
ACQUIRING
RETAINING
SERVICING
Contact Channels
Interaction Center
Internet
Mobile
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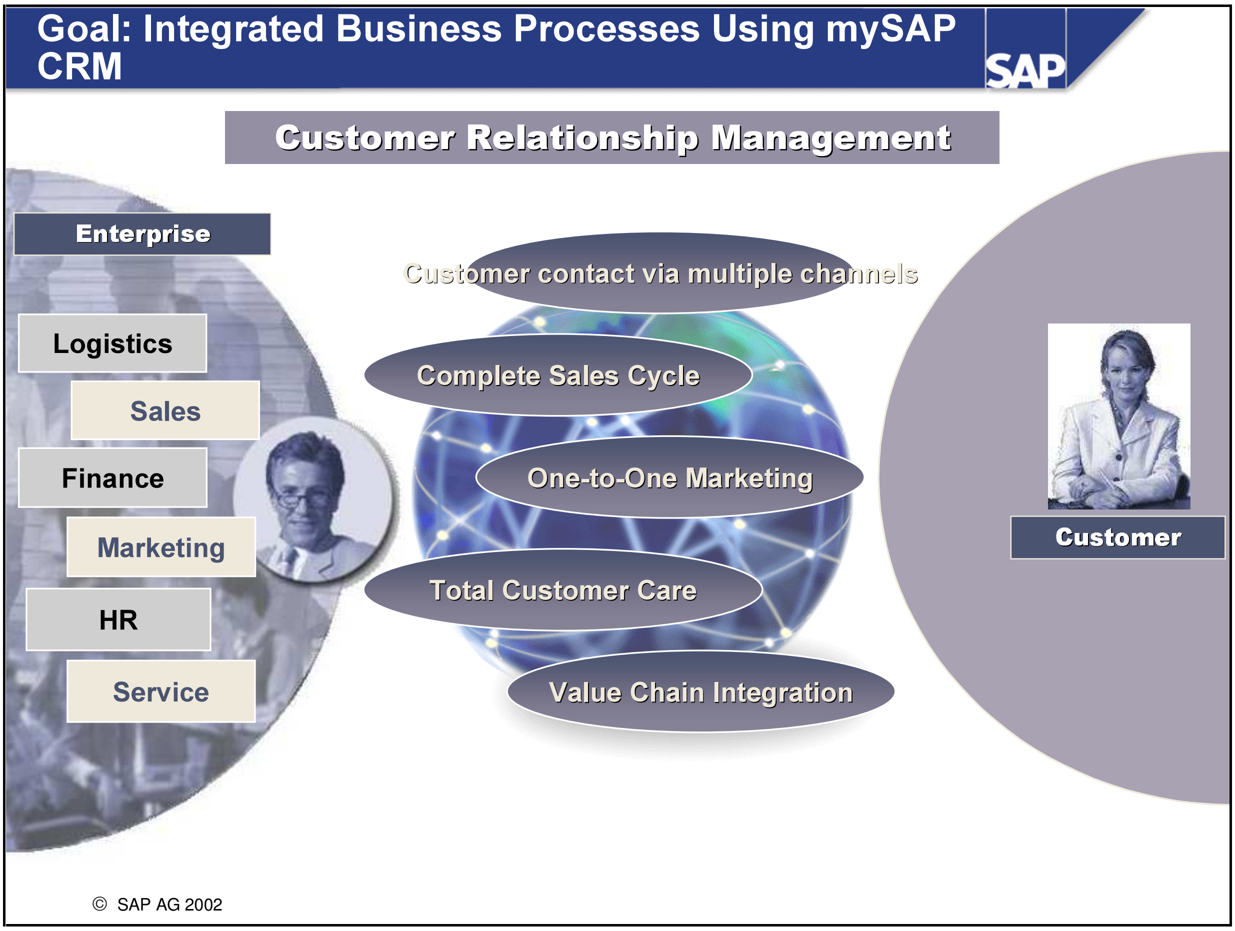
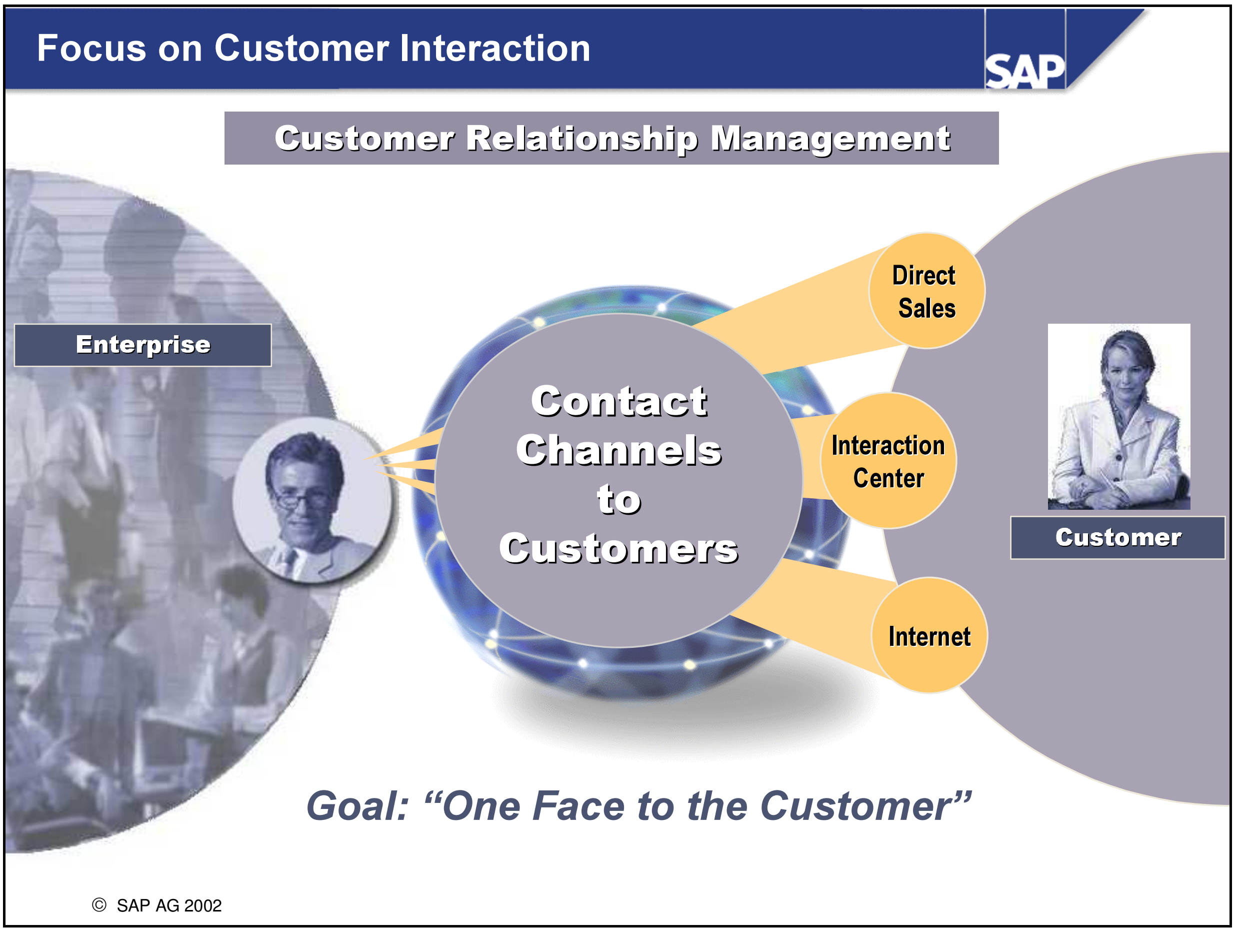
Introduction: Business Scenario

- You have just joined IDES, Inc., a global company. You want to outline the CRM idea as a business concept, and the mySAP CRM Solution planned by IDES Inc.

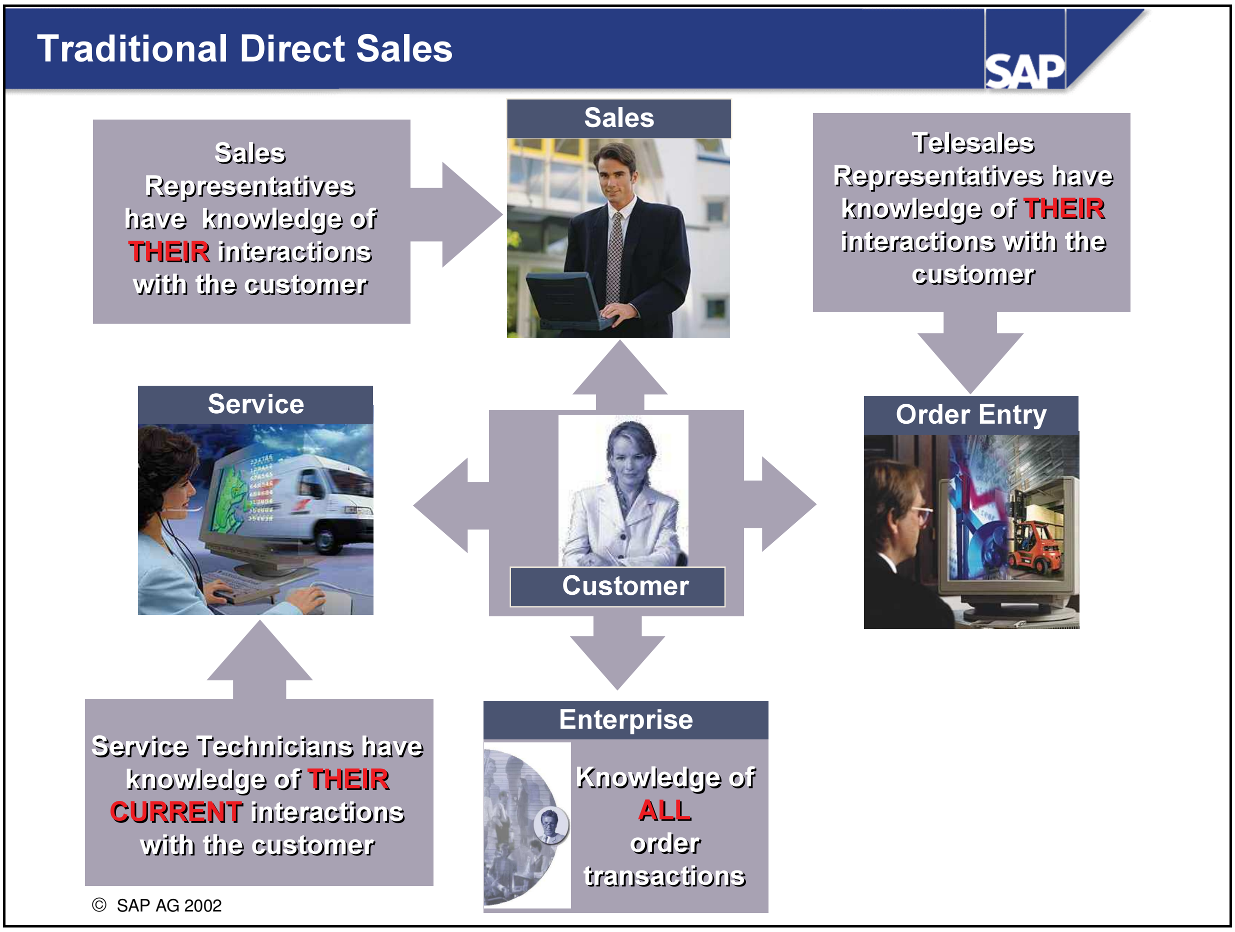
IDES inc.



- my SAP Customer Relationship Management (mySAP CRM) is a comprehensive sales and marketing approach that supports you in building long-term customer relationships and improving business performance.
- Explosion of customer choice and disaggregation of traditional value chains requires new models of value creation.
- Customers increasingly expect solution-based offers with benefits beyond traditional dimensions of price, quality, and performance.
- Winning models are driven by 3 core elements, labeled Customer Value Optimization (CVO):
  - Personalization*:* Customer-driven solutions supercede product selling.
  - Integration*:* End-to-end sense and respond information flow which caters for the entire business process and supercedes make and sell silo flows.
  - Collaboration*:* Multi-enterprise value networks sharing information supersedes vertically integrated value chains.
- The impending wave of Web-based transformation offers substantial value-creating opportunities to those able to execute these three dimensions.

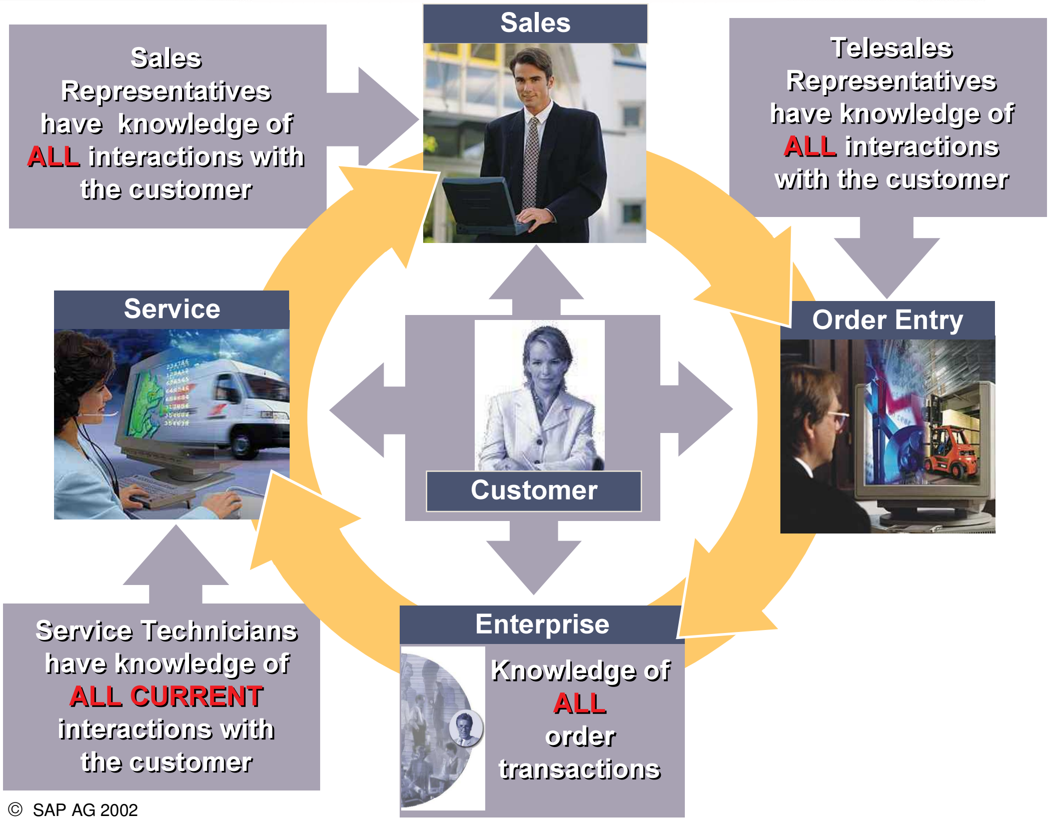


- Three essential contact channels are currently available to the customer in Sales. Up till now, these were used in the traditional Sales with CRM as a new business concept.
- **Direct Sales** traditionally involves a sales persons and/or service representatives meeting with the customer directly.
- The **Interaction Center** is defined as a central point where all calls and phone interaction with the customer takes place. Like in a traditional Call Center, employees in different departments can take calls, process customer inquiries and enter orders. Another use for the Interaction Center is the Help Desk environment. The result is a central point of knowledge about customer issues.
- **Internet** interactions consists of using the internet to buy and sell. There are two distinct methods of using the internet to buy and sell:
  - Business-to-Consumer (B2C)
  - B2B - Business-to-Business
- The goal of CRM as a business concept is to "show one face to the customer." All employees in contact with customers should be informed about all past interactions with the customer from all contact channels.



- Traditional direct sales deals with decentralized information about customers. In some cases, only one employee is informed about customer and interaction information.
- Information is typically not shared within the company.
- If passed on to other agents, information is often limited and inaccurate. Valuable customer information is lost due to employee fluctuation.

Direct Sales Today with CRM



- Today, with CRM, all interaction information is readily available to anyone needing access.
- Mobile Sales and Mobile Service allow representatives in the field to have hands-on knowledge of ALL customer interactions via laptops and other portable devices.
- Information analysis can make businesses more knowledgeable about the customer. This improves service and, solves problems more quickly, thus improving relationships and increasing customer retention.

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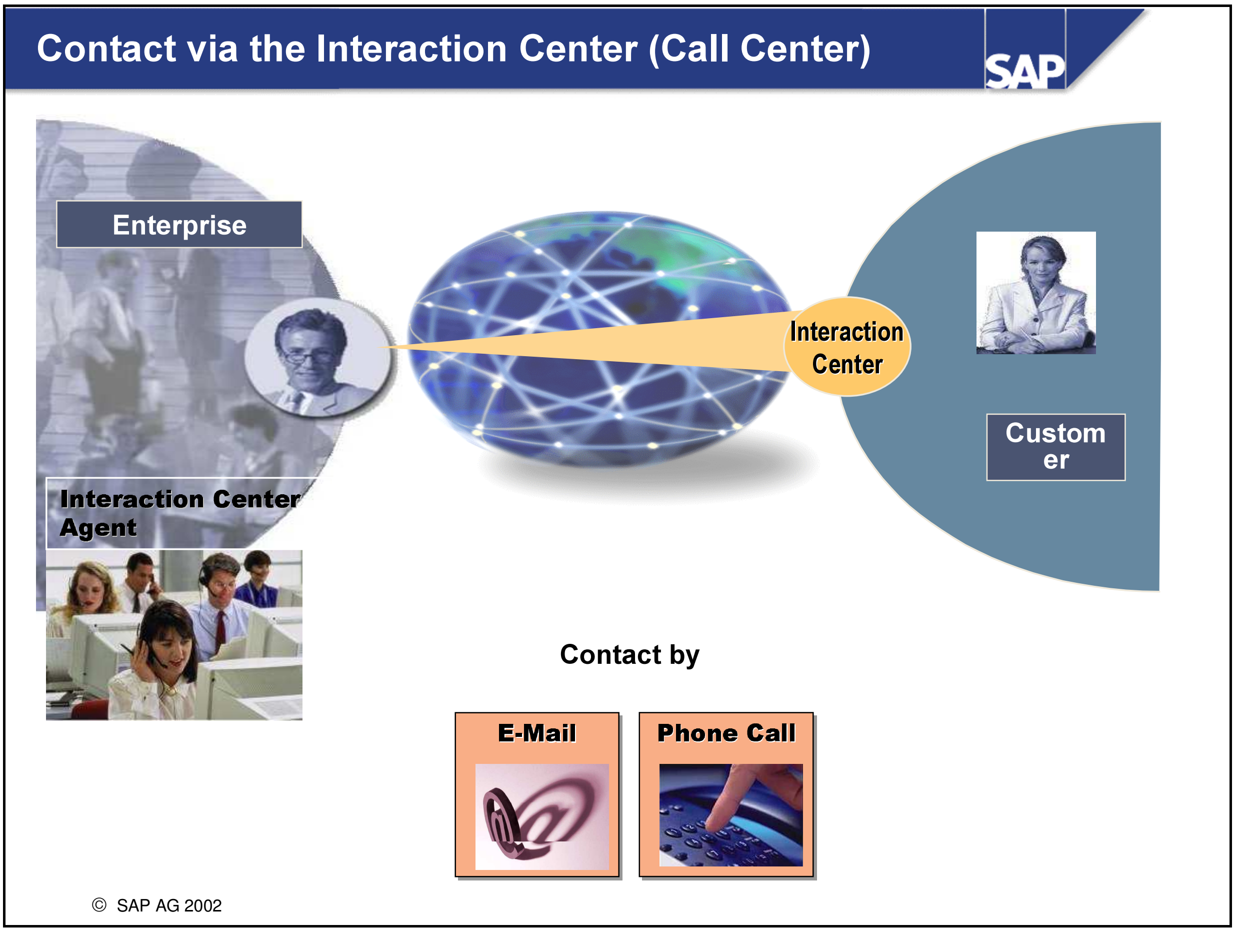
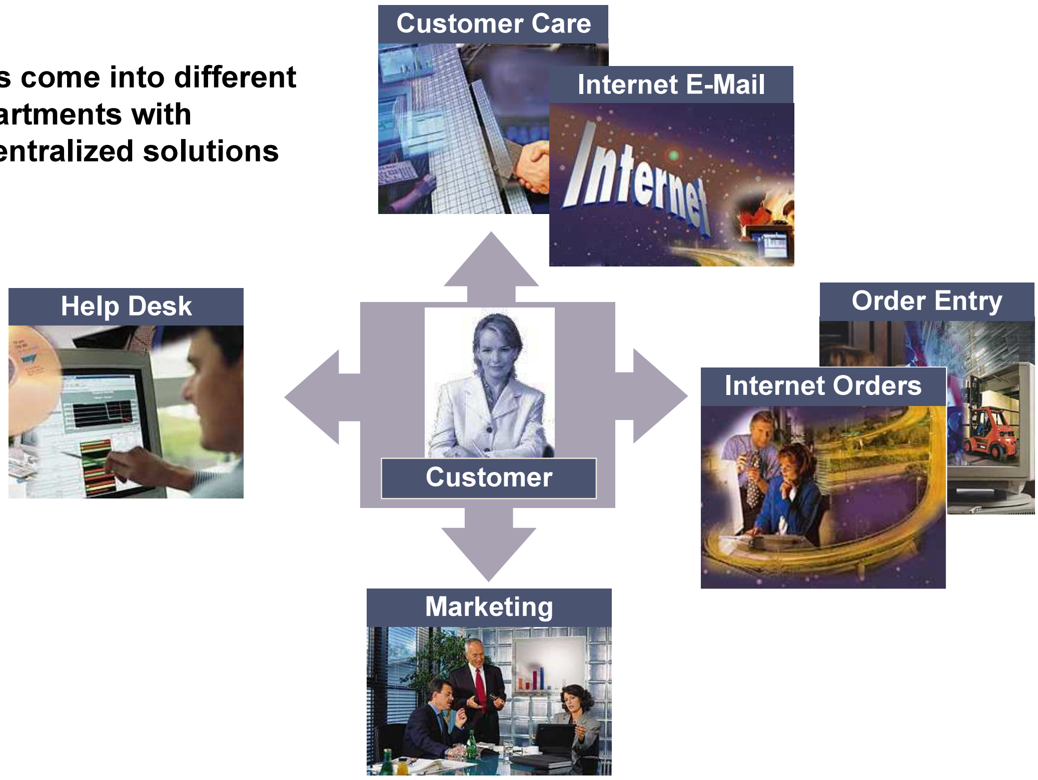


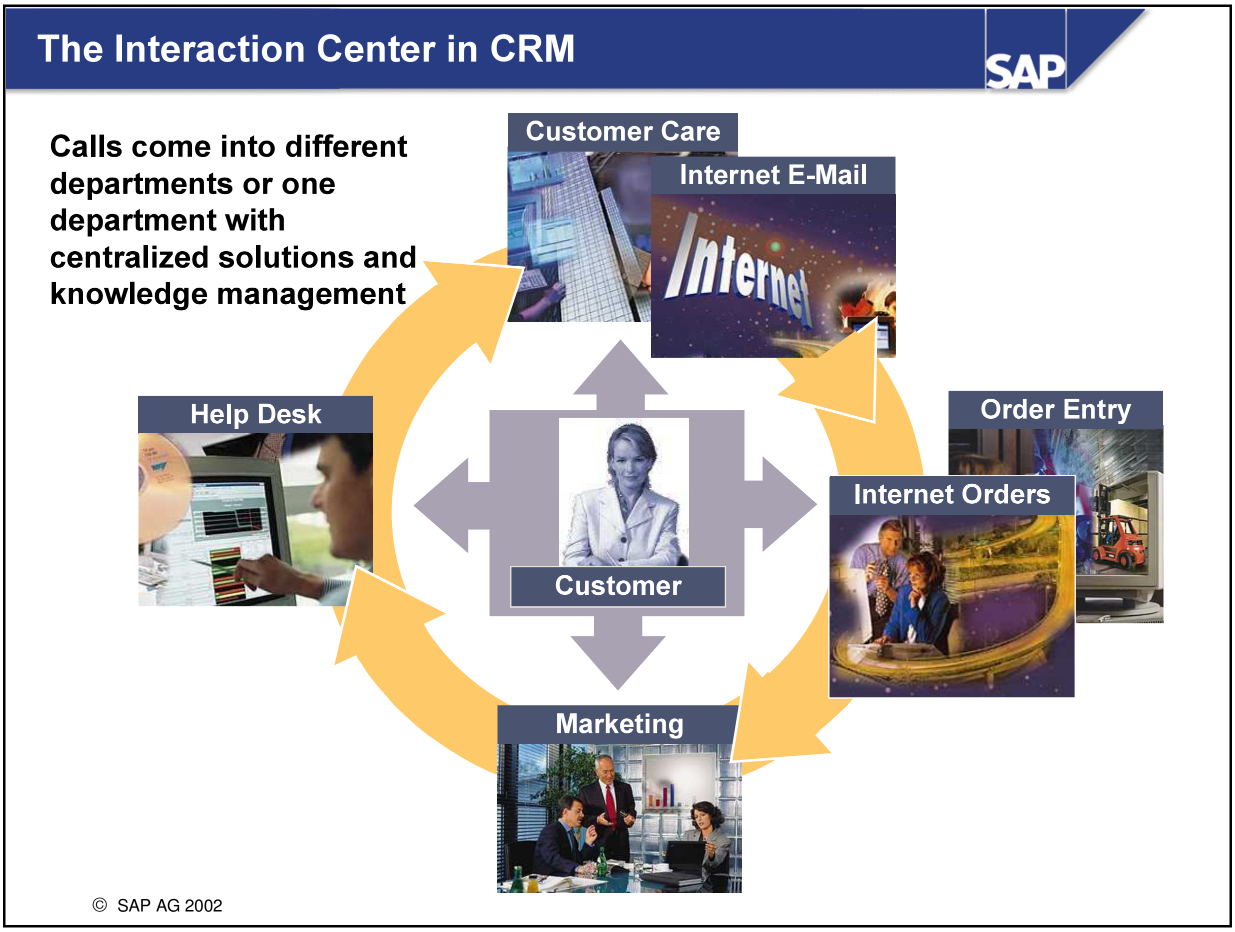
- The contact with the customer is supported via the telephone or e-mail in the Interaction Center (Call Center).
- Individual employees, that is, agents, receive sales orders and requests.
- Depending on the area, these are grouped into departments or agent groups.

Traditional Call Center / Interaction Center

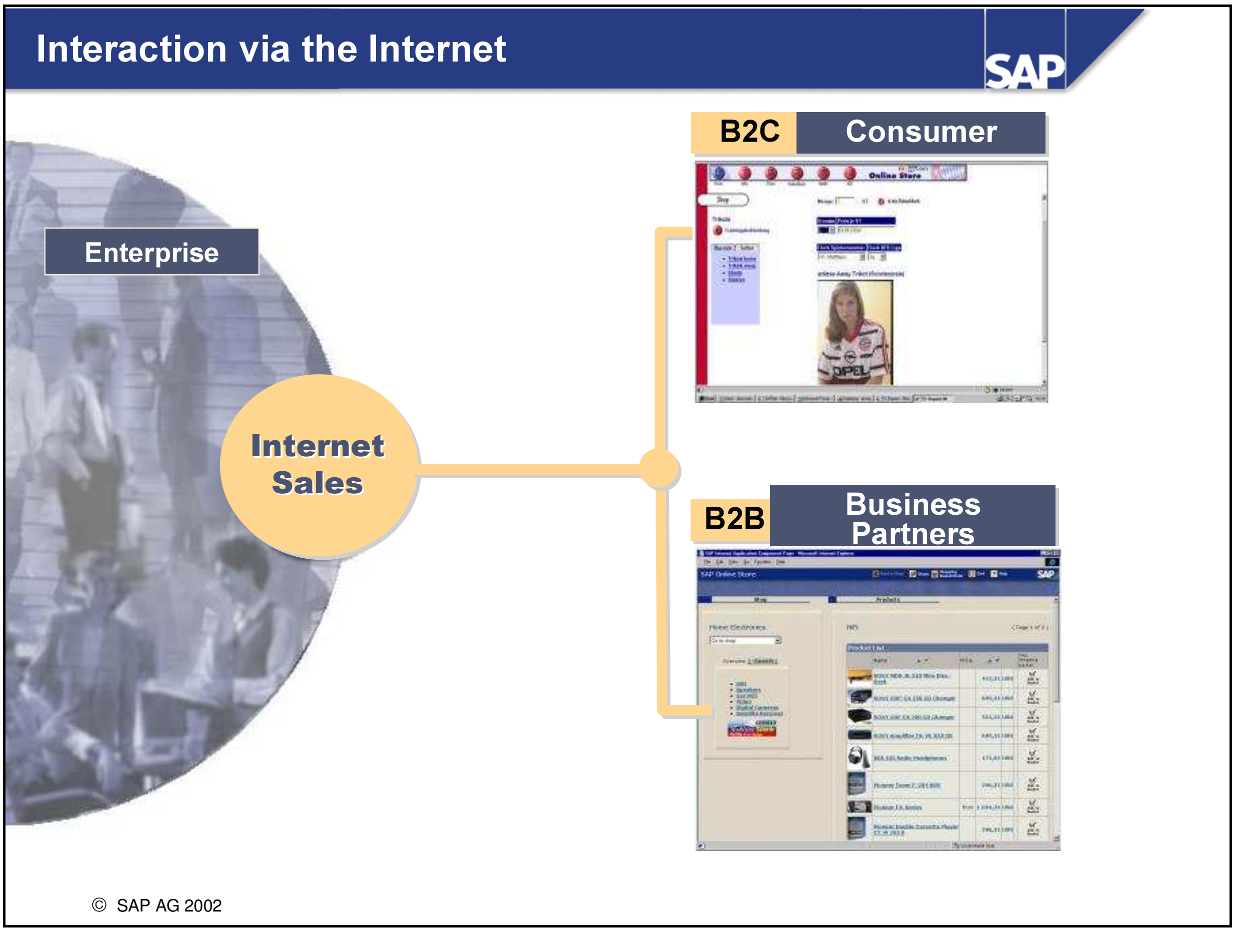
Calls come into different departments with decentralized solutions



- In the traditional Call Center, individual departments within a company deal with incoming messages in varying ways. No exchange takes place between departments or distribution channels. This means that information is lost between departments within a company.

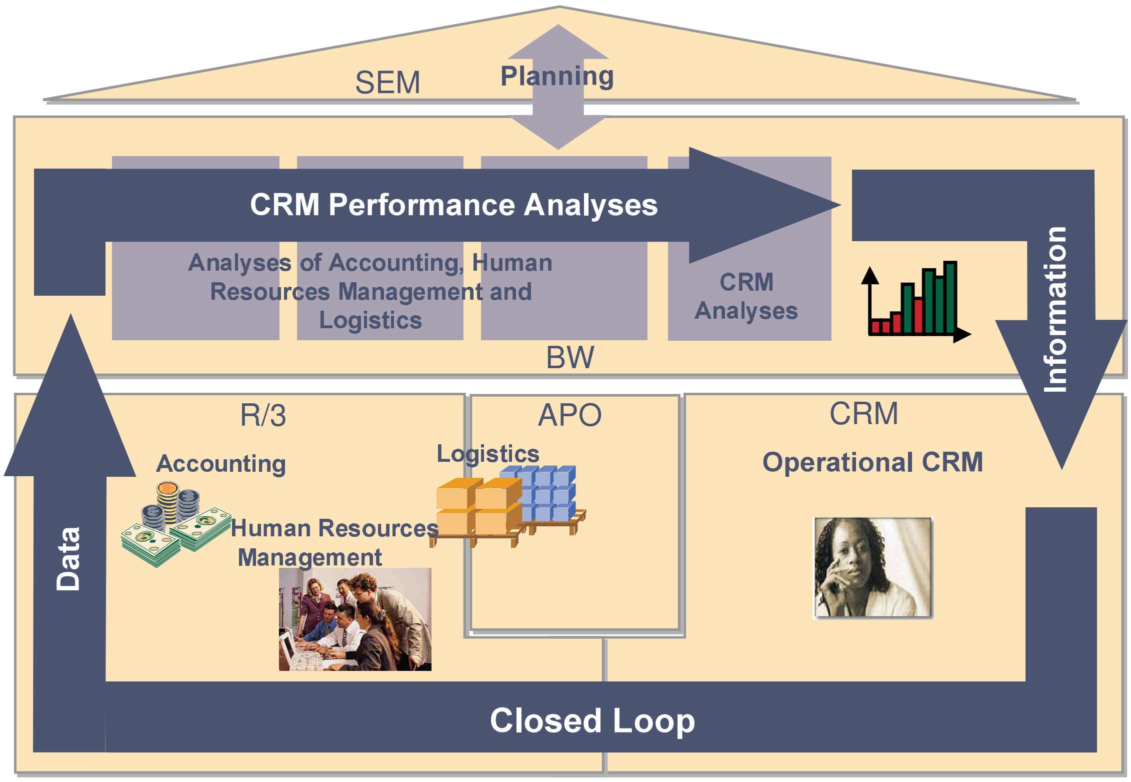


- The CRM Customer Interaction Center (CIC) saves all incoming messages centrally in the corresponding customer data.
- Integration of e-mail, automated response systems, and customer self-service provides the customer with information in a consistent and efficient manner.
- All agents are informed about customer history, for example, activities and sales orders with the customer.

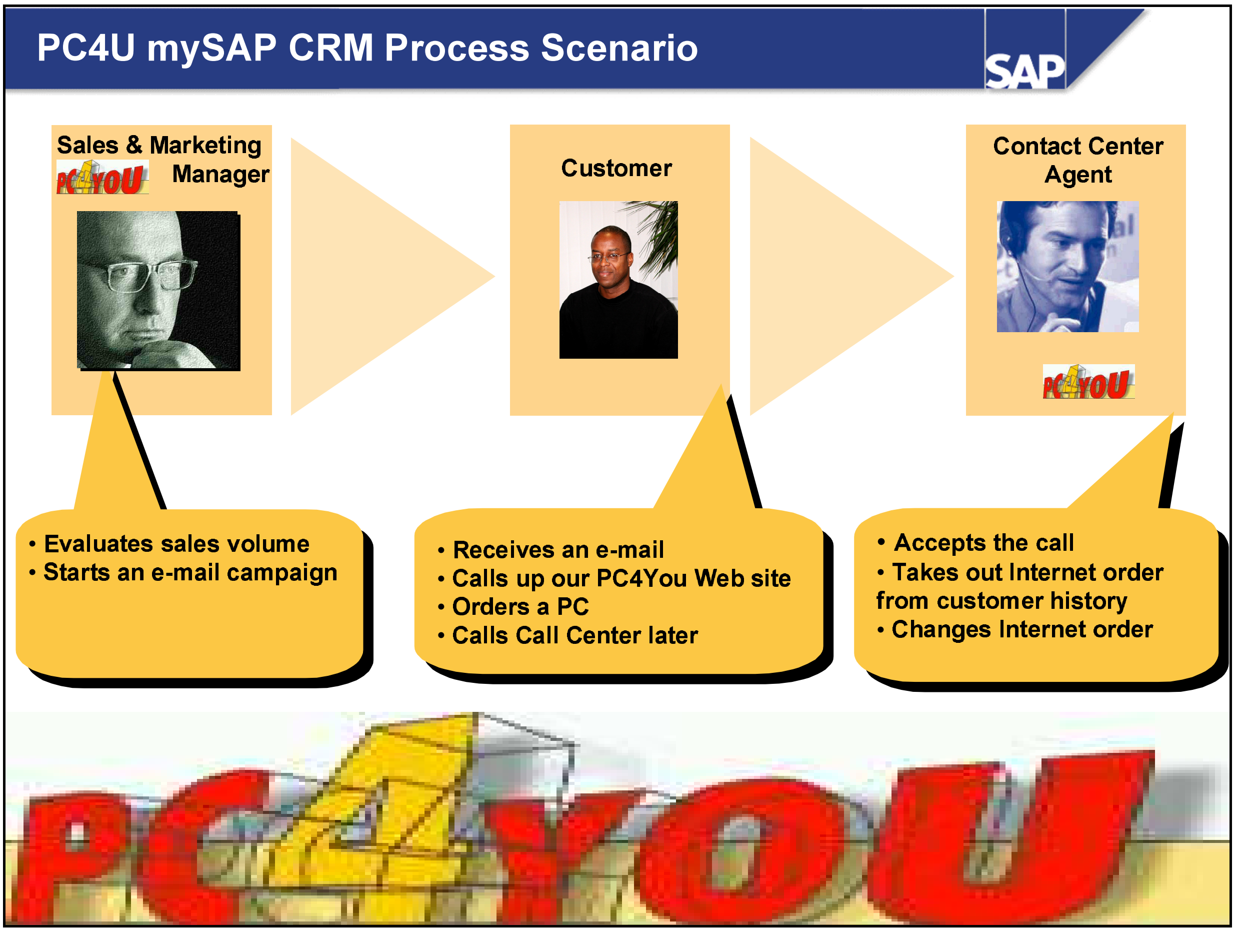


- Today, with the advent of the Internet and Internet technologies, customers and businesses can find businesses that offer and the products and services they want for a good price.
- Nowadays, the sales and purchasing of products is based on two basic scenarios:
  - B2C – Business-to-Consumer:
    Direct sales to end customer as an additional channel for a company with personalized product offers
  - B2B – Business-to-Business:
    Companies use the Internet to buy from and sell to other companies using the Internet.

Analytical Part of mySAP CRM



- The CRM performance analyses form the analytical part of the mySAP CRM Solution. Data from the operative CRM processes and from Accounting, Human Resources Management, and Logistics is copied from SAP Business Warehouse (BW) and processed. The connection to SAP Strategic Enterprise Management (SEM) enables you to include planning data in the evaluations alongside operative data. The CRM performance analyses convert this data to a balanced relationship, depending on the vantage point of the selected evaluation. The gathered information flows back into the optimization of the processes on the operative level (closed loop).
- The evaluations are all structured so that the four perspectives - finances, customer, internal processes and learning and growth - have a balanced relationship with one another. This means that cross-module cause-and-effects chains are visible and measurable. For example, you could investigate whether qualification measures for employees in Telesales lead to higher sales volumes and higher customer satisfaction in this area.
- The CRM performance analyses have two different organizational levels: role-based and topic-based evaluations.
  - Role-based: from the viewpoint of a sales manager, service manager or marketing manager, for example
  - Topic-based: within the CRM application: Sales Analytics, Service Analytics, Marketing Analytics, Channel Analytics, for example



- PC4you is a large computer manufacturer and has just installed mySAP CRM.
- The performance analysis in CRM shows the sales and marketing manager that it is necessary to start an e-mail publicity campaign to penetrate the market more successfully. He sends personalized e-mails to selected customers.
- The customer receives an e-mail and immediately logs onto the PC4you Web site. He is impressed at the products and immediately orders a PC.
- Later, he wants to enhance his Internet order via the telephone.
- The agent uses the customer history in the Interaction Center to quickly find the order and change the customer's requirements accordingly.

Introduction: Unit Summary

You are now able to:

- **Describe the idea of CRM as a business concept compared to traditional sales, by means of different contact channels to the customer**
- **Describe the mySAP CRM method of resolution by means of a selected business scenario**

Exercises

Unit: Introduction

Topic: Navigation

At the conclusion of this exercise, you will be able to:

- Navigate mySAP CRM and locate various pieces of information about CRM

You need to be able to review business partner and other information in mySAP CRM

1-1 Log on to mySAP CRM.

User ID: CRM-## (Group number assigned by instructor)

Password: Provided by instructor

1-2 View your Business Workplace and view an incoming mail.

1-2-1 View your incoming mail and display the first document in your mailbox. Record the mail description.

____

1-2-2 Optional settings: Add the transaction for the Business Workplace (Transaction code: SBWP) to your Favorites menu.

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Solutions

Unit: Introduction

Topic: Navigation

1-1 Log on to mySAP CRM.

User ID: **CRM-##** (Group number assigned by instructor)

Password: Provided by instructor

1-2 View your Business Workplace and view an incoming mail.

1-2-1 View your incoming mail and display the first document in your mailbox. Record the mail description.

From the application toolbar, select the ***SAP Business Workplace*** **icon** (or from the menu bar: ***Menu → Business Workplace)***
and then select ***Inbox→ Unread Documents.***

The title of the e-mail will vary for each class.

1-2-2 Optional settings: Add the transaction for the Business Workplace (Transaction code: SBWP) to your *Favorites* menu.

Menu bar: ***Favorites → Insert Transaction***

Transaction code: Enter **SBWP** and confirm with ***Enter***

The entry for the SAP Business Workplace should now appear in your Favorites menu.

CRM Architecture

Contents:

- CRM Architecture Overview

CRM Architecture: Unit Objectives

At the conclusion of this unit, you will be able to:

- **Describe the various components of the CRM architecture**
- **List the various systems used within the CRM landscape**

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Course Overview Diagram

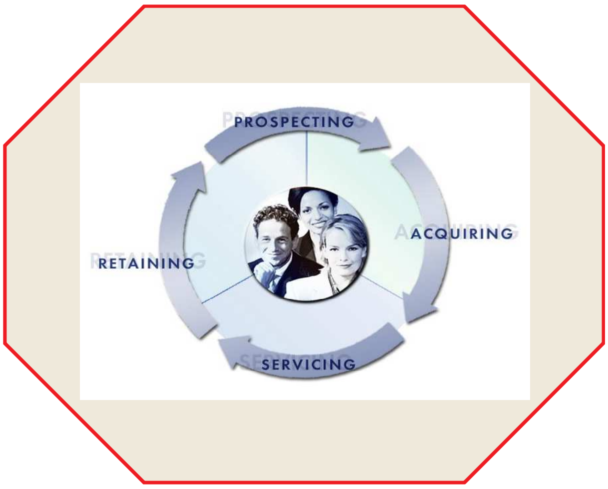
Marketing | Sales | Service

Task

Customer

Relationship

Management



Contact Channels

Interaction Center

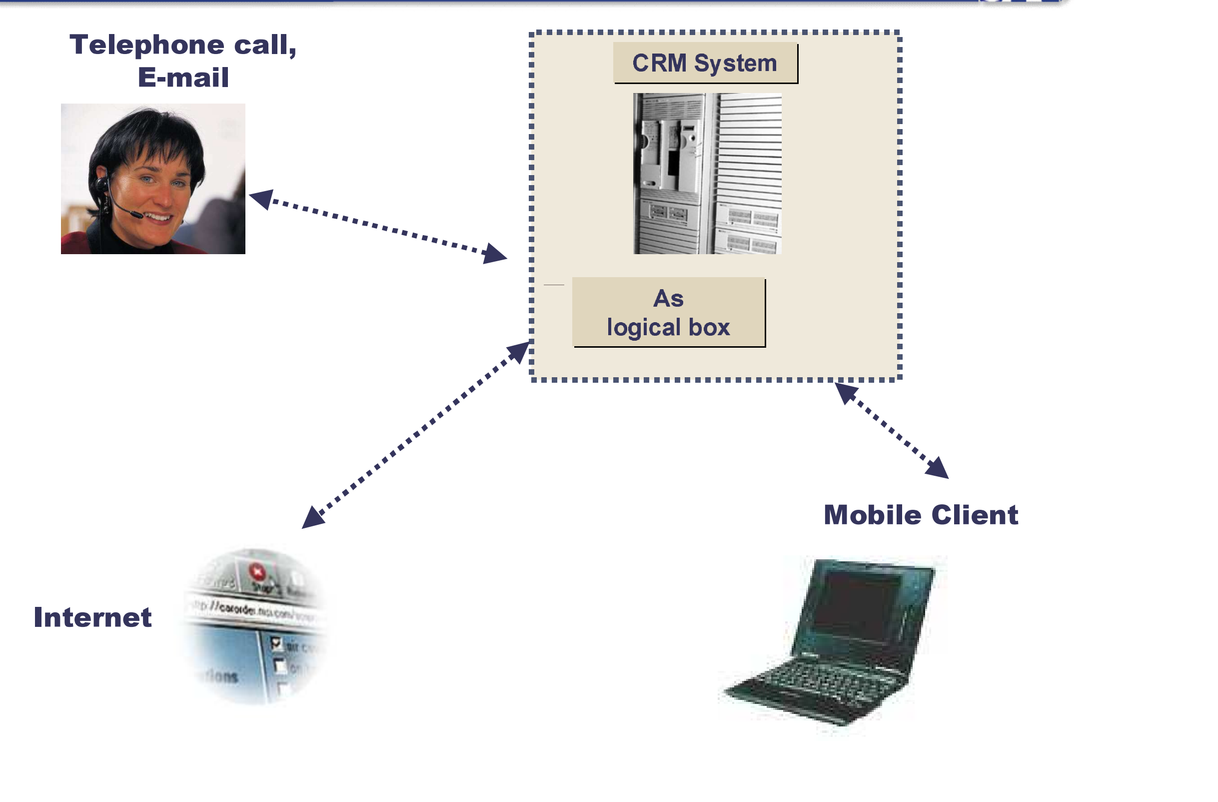
Internet

Mobile

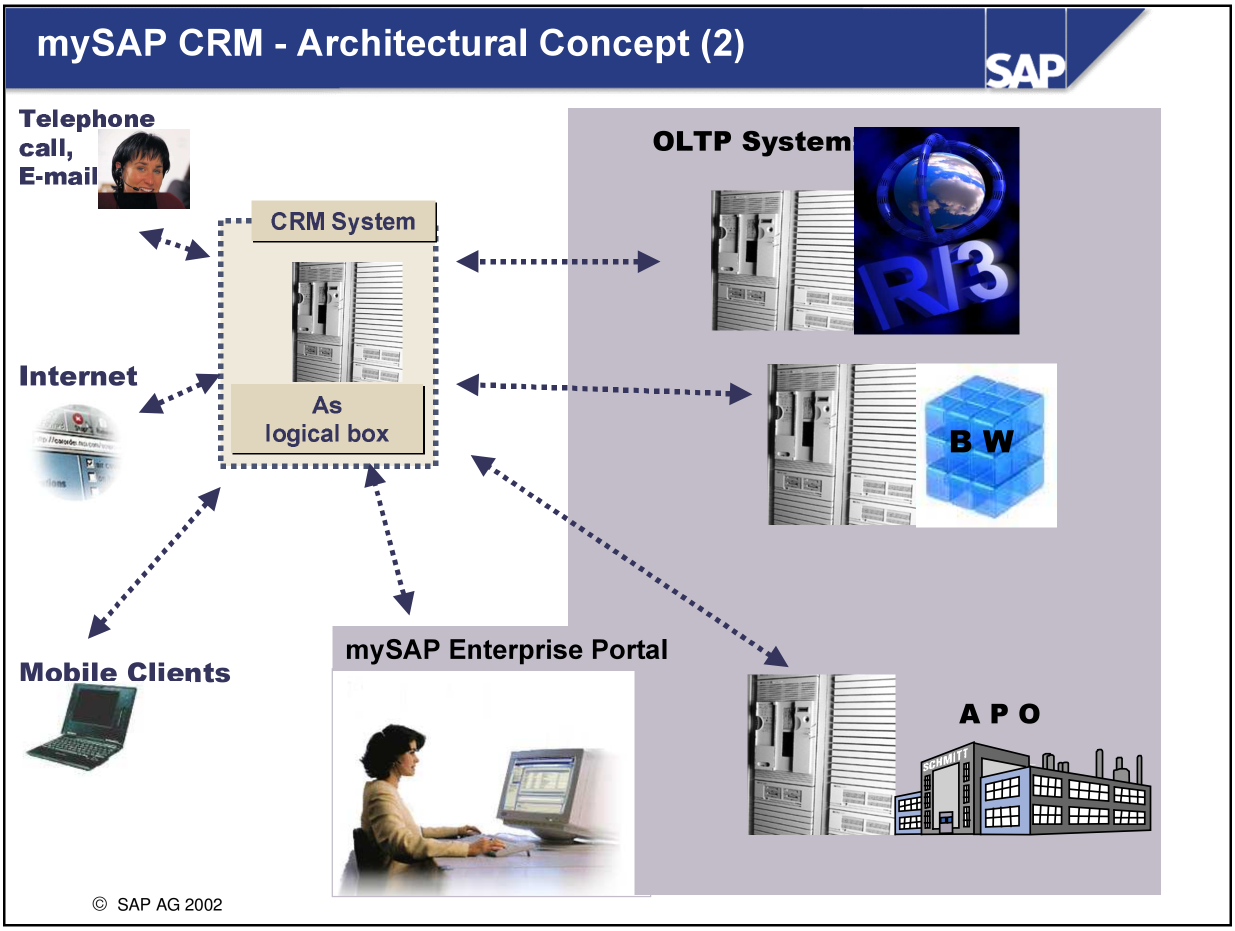
CRM Architecture: Business Scenario

- At IDES, Inc. you will be implementing various roles within the CRM environment and you need to understand the system landscape for CRM.

mySAP CRM - Architectural Concept (1)

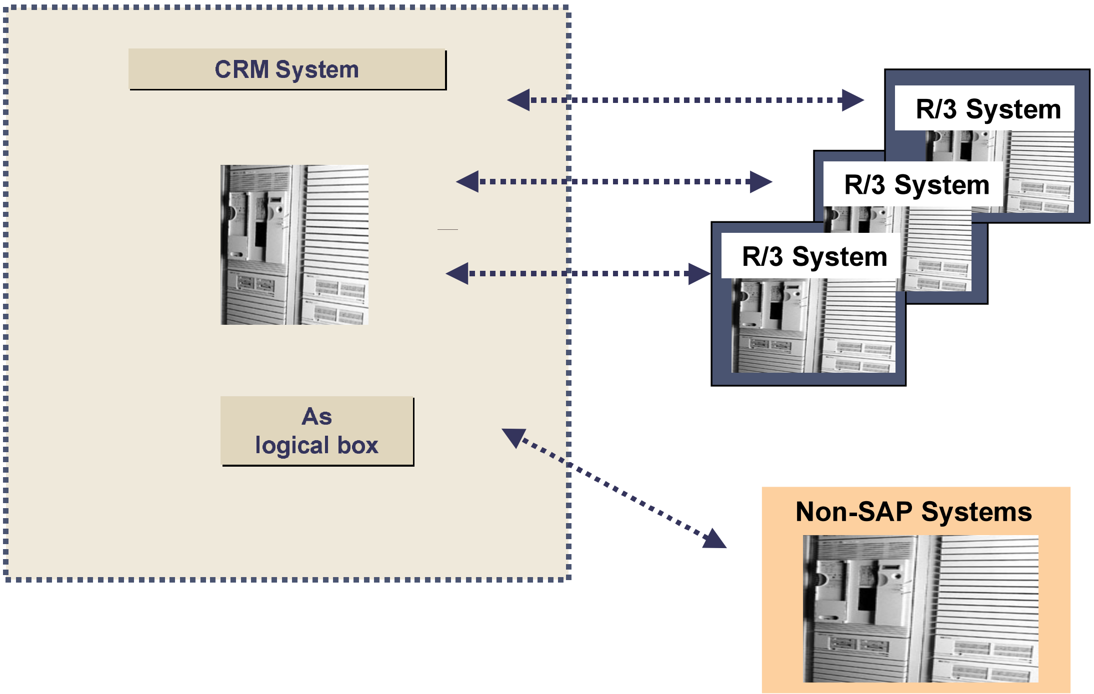


- mySAP.com application component Customer Relationship Management (CRM) incorporates a central CRM server and a series of extensions. They enable access to the system via various channels and connections to other systems. You must, of course install the extensions you require.
- The following application components are supported in the CRM:
  - Interaction Center: The integrated Interaction Center permits customers to use phone, fax, or e-mail to contact sales or service representatives.
  - Internet: Internet users may configure and order products or services using the Internet components of mySAP CRM.
  - Mobile Clients: The mobile sales force or mobile service engineers can connect to the system from their laptops or other mobile terminals to exchange the latest information with mySAP CRM.



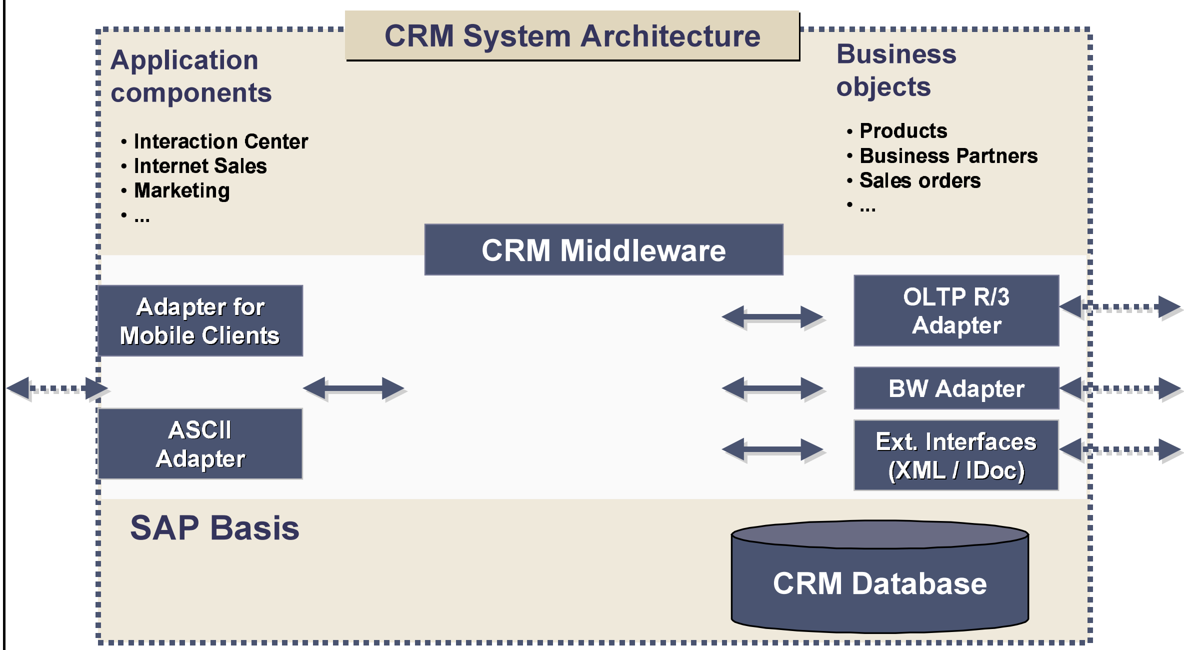
- mySAP CRM is the sum of all CRM functions and incorporates not only CRM components but also the Business Information Warehouse (SAP BW), Advances Planner and Optimizer (SAP APO) and SAP R/3. The mySAP CRM Solution offers you the following fully-integrated connections:
  - SAP R/3 as a back-end system with proven ERP functions
  - The Business Information Warehouse (SAP BW) as a data warehouse solution that offers you substantial possibilities for statistics and analysis
  - Advanced Planner and Optimizer (SAP APO) as a global Available-to-Promise (ATP) check and sales planning solution
  - mySAP Enterprise Portal as a tool that gives you integrated access to all CRM and non-CRM components

mySAP CRM - Flexible Architectural Concept



- As of Release 3.0, mySAP CRM gives you a flexible CRM landscape.
- Multiple back-end systems are supported. It is possible to connect multiple R/3 back-end systems as well as non-SAP systems.

CRM System Architecture



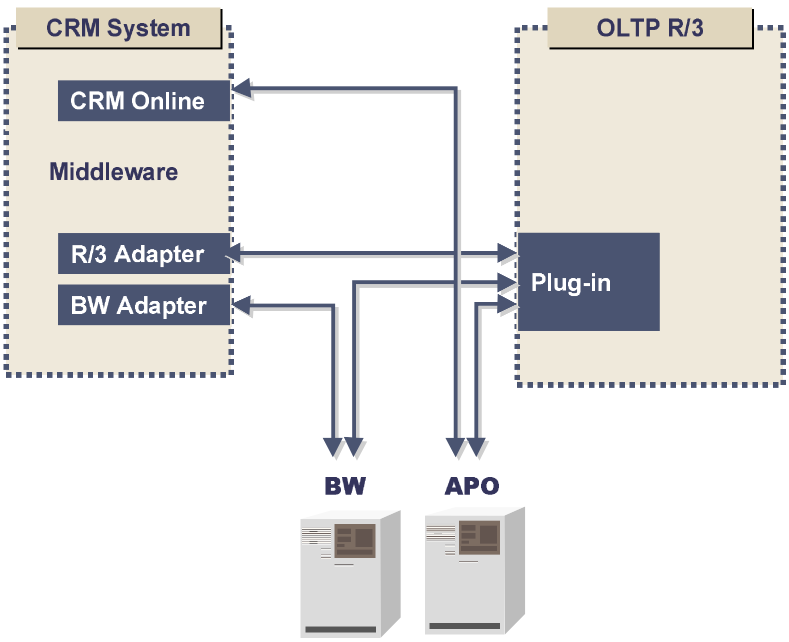
- The CRM component supports the handling of CRM business objects, like customers and prospects, activities and opportunities, products and product catalogs in a variety of application components like Internet sales, service interaction center, telesales, campaign management, and various others. Some of these components need external extensions for communication or integration purposes. These will be described in more detail in later sections.

- A middleware layer supports the controlled data exchange with other systems – mobile clients, back-end systems, and data warehouses. Especially for mobile clients, a replication mechanism ensures a consistent and up-to-date data set on the distributed local databases. Message queuing ensures delivery and processing of data.

- Software adapters are used to connect to external systems. These adapters assign data and convert it into various formats. The ASCII Adapter and external interfaces are provided for this purpose. The CRM application components also exchange data with the middleware layer via a CRM adapter.

- The CRM component is built on the SAP Basis System, which provides a proven development platform, scalability, platform independence, and various other SAP R/3 tools. Therefore, a CRM System can be configured in the same flexible way as SAP R/3.

CRM and Other SAP Systems

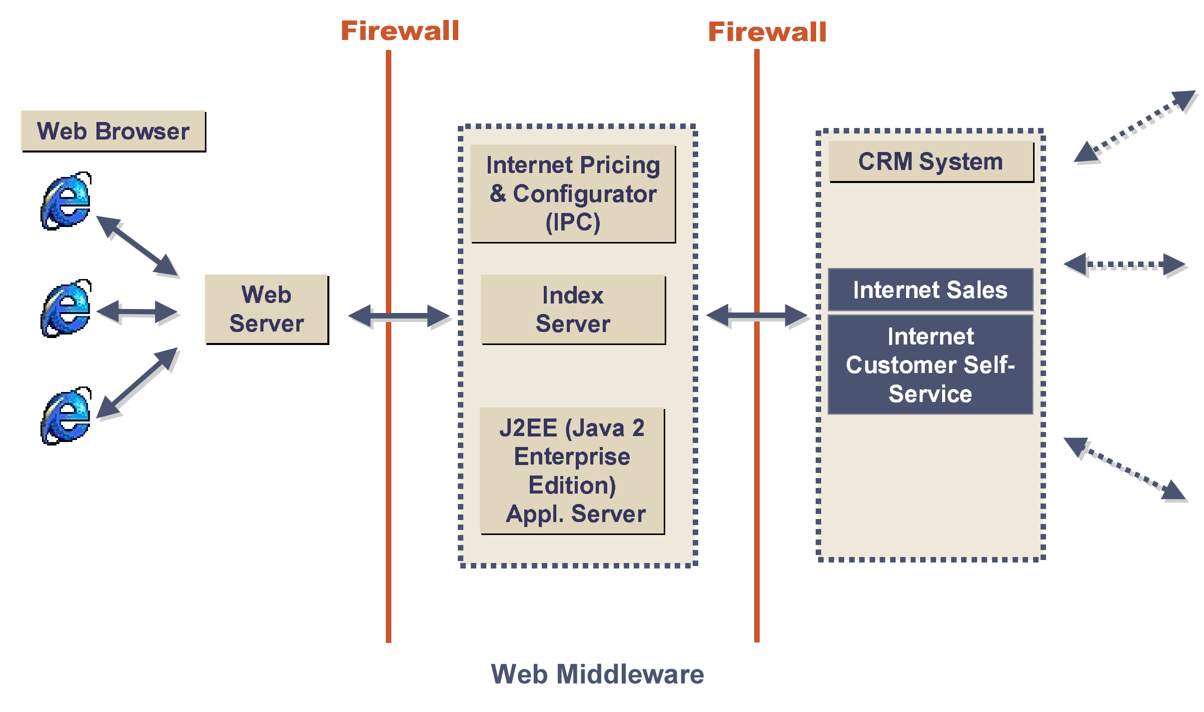


- Data is exchanged between the CRM system and a connected OLTP R/3 **(minimum release 3.1I)** system primarily via the CRM Middleware. A plug-in installed on the OLTP R/3 System acts as a counterpart to the R/3 adapter, supporting the communication of data between the two systems. The data exchange includes an initial transfer of customizing, master, and transactional data to the CRM System, as well as delta data in both directions.

- Sales orders are entered either in the *Internet Sales* application component or the *CRM Online* component. To confirm whether the requested items can be delivered on time, you need to carry out the Available-to-Promise (ATP) check. The SAP Advanced Planner and Optimizer (SAP APO) performs these functions. APO is used in Supply Chain Management and can be integrated seamlessly with the CRM component.

- The SAP Business Information Warehouse (SAP BW) is used as a data source for part of the CRM Solution, but also contains data for consolidation and analysis.

CRM and Internet Users



- The *Internet Sales* and *Internet Customer Self-Service* application components offer access to the CRM component for Internet users connecting to configure and purchase products from published catalogs, or to request a particular service. The shipped-standard templates provide a ready-to-run solution, but can also be adjusted to individual requirements.
- The Internet application components are available via a Web server and are made possible by J2EE (Java 2 Enterprise Edition) technology. This technology represents an open, non-SAP proprietary platform.
- Product catalogs are exported from the CRM System to an external index server for faster access to product data.
- The Internet & Pricing Configurator (IPC) component provides configuration and pricing data for Web applications. This design as a separate component ensures the high performance needed in an Internet environment.

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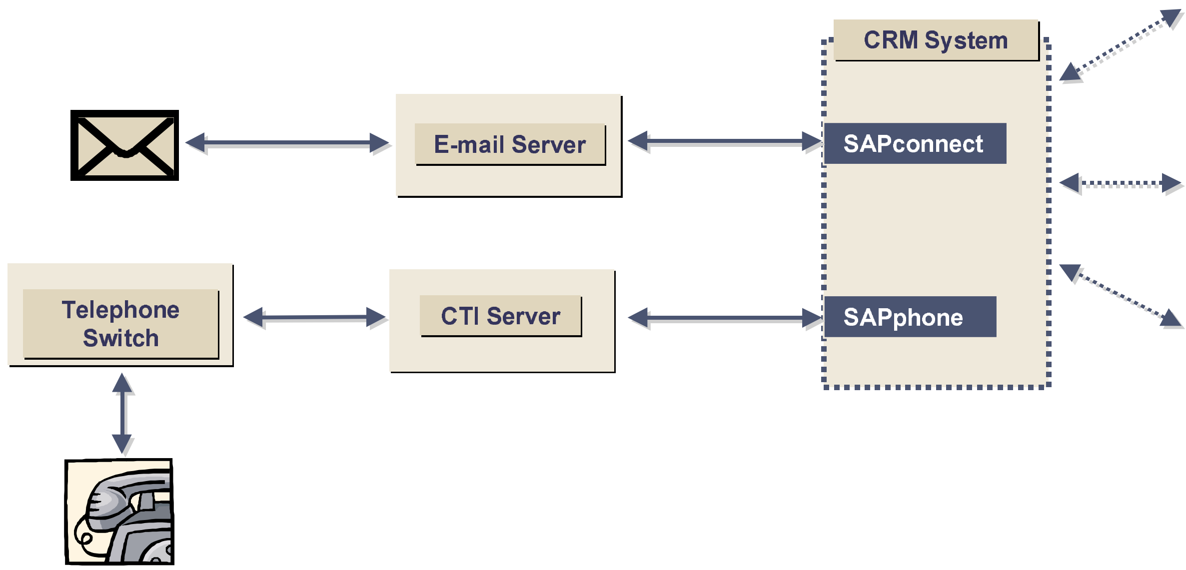
Interaction Center Architecture



- The Interaction Center supports various communication channels, such as telephones, e-mail, fax and Internet applications such as Call me back, Co-Browsing, and Voice over Internet Protocol (VoIP).
- You can make telephone and e-mail connections using the SAP standard interfaces (APIs) SAPphone and SAPconnect (see graphic).
  - As part of mySAP CRM, SAPphone forms an interface between the CRM application components and Computer Telephony Integration (CTI). CTI, in turn, creates the connection to telephone switching. CTI vendors must be certified through the SAP Complementary Software Program (CSP). The provision of a standard interface guarantees flexible scalability of the CTI components.
  - The SAPconnect interface in connection with the SAP workflow is utilized to support the complete e-mail process cycle from and to business partners. Receiving mail from the mail server, SAPconnect routes the mail to SAPoffice as an integral part of the CRM component. Depending on the receiver address and workflow definition, the mail is routed to the pre-defined queue(s) and the sender may automatically receive an acknowledgement reply.
- SAP, together with various external software partners, offers you the possibility to integrate different contact channels. This enables you to optimize processes in the Interaction Center permanently according to the following parameters:
  - Contact type: telephone, e-mail, fax, Internet application
  - Business activity direction: inbound, outbound
  - Different agent qualifications and responsibilities
  - Different customer status or requirements profiles

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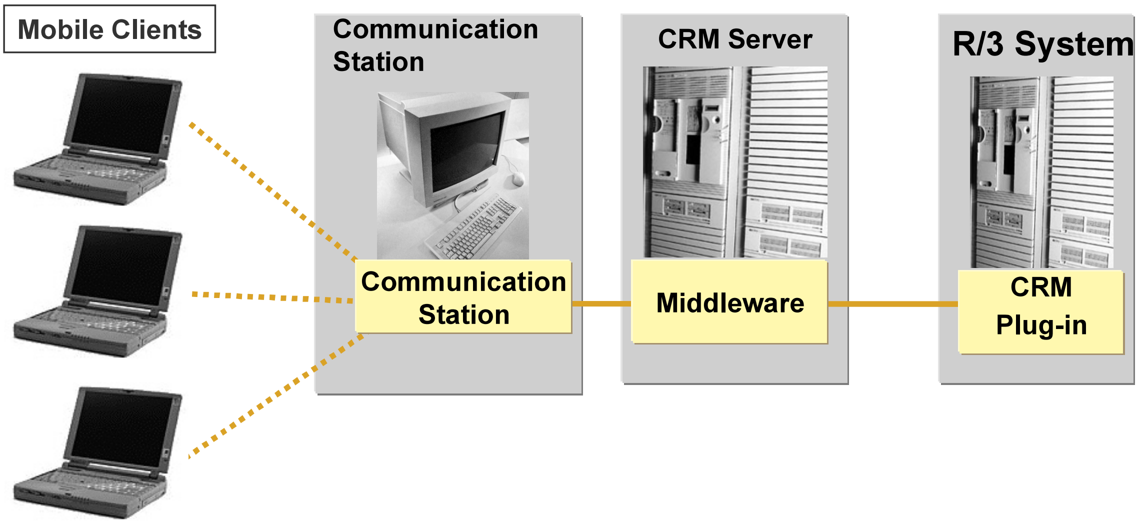
Connecting the Mobile Client



- mySAP CRM Mobile Sales and Mobile Service support a company's mobile field sales and service employees.
- Users have complete access to all relevant information on their laptops; however, each user only has access to data in his area of responsibility (for example, all customers of one postal code).
- This data is updated by regular data exchanges between laptops and the central server. The communication station serves as a translation instrument between various data environments.

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CRM Architecture: Unit Summary

You are now able to:

- Describe the various components of CRM architecture
- List the various systems used within the CRM landscape

CRM Master Data

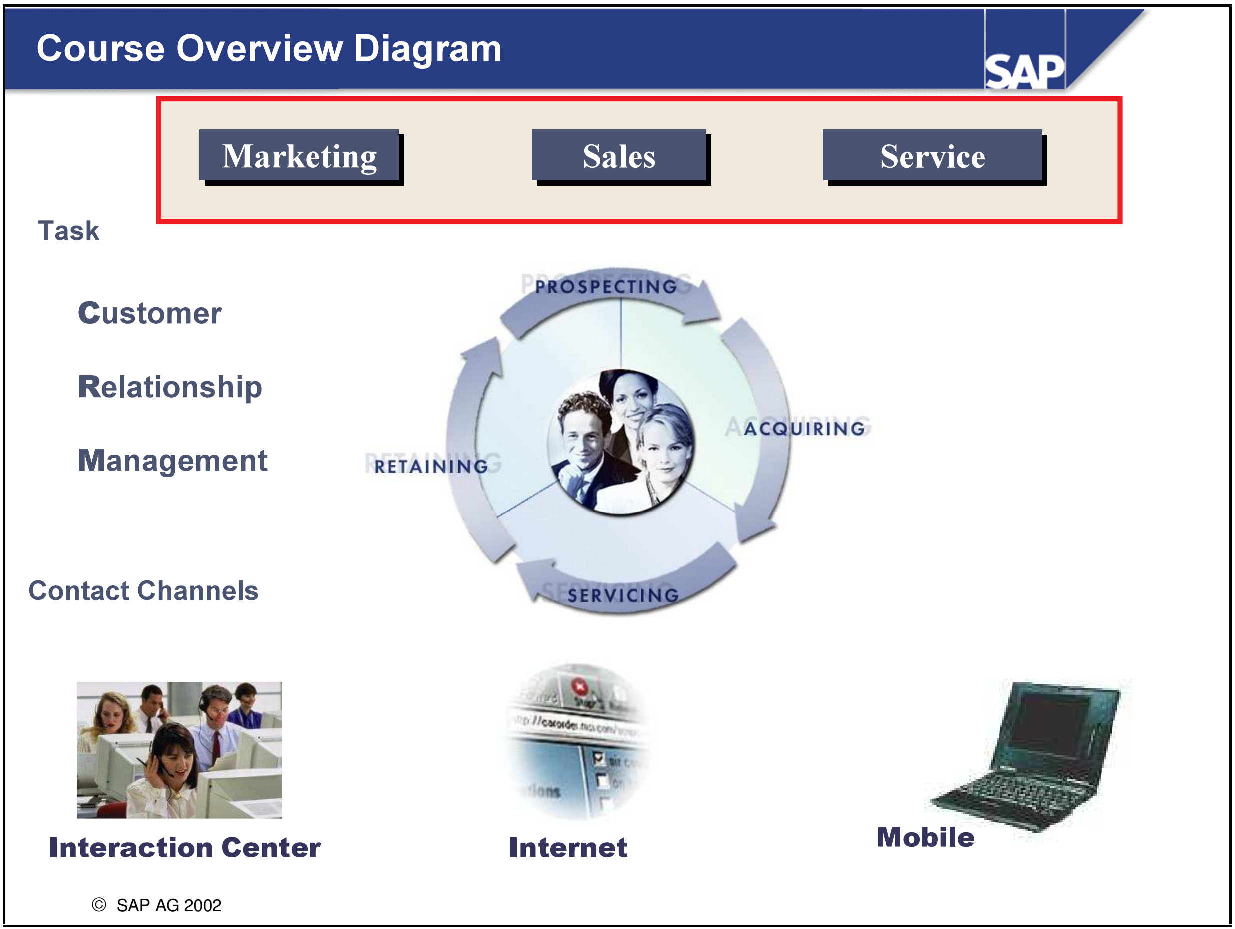
Contents:

- **Business Partners**
- **Products and Product Catalogs**

CRM Master Data: Unit Objectives

At the conclusion of this unit, you will be able to:

- **Define business partners and how they are used in CRM**
- **Define products and product catalogs and how they are used in CRM**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PROSPECTING
ACQUIRING
RETAINING
SERVICING
Contact Channels
Interaction Center
Internet
Mobile
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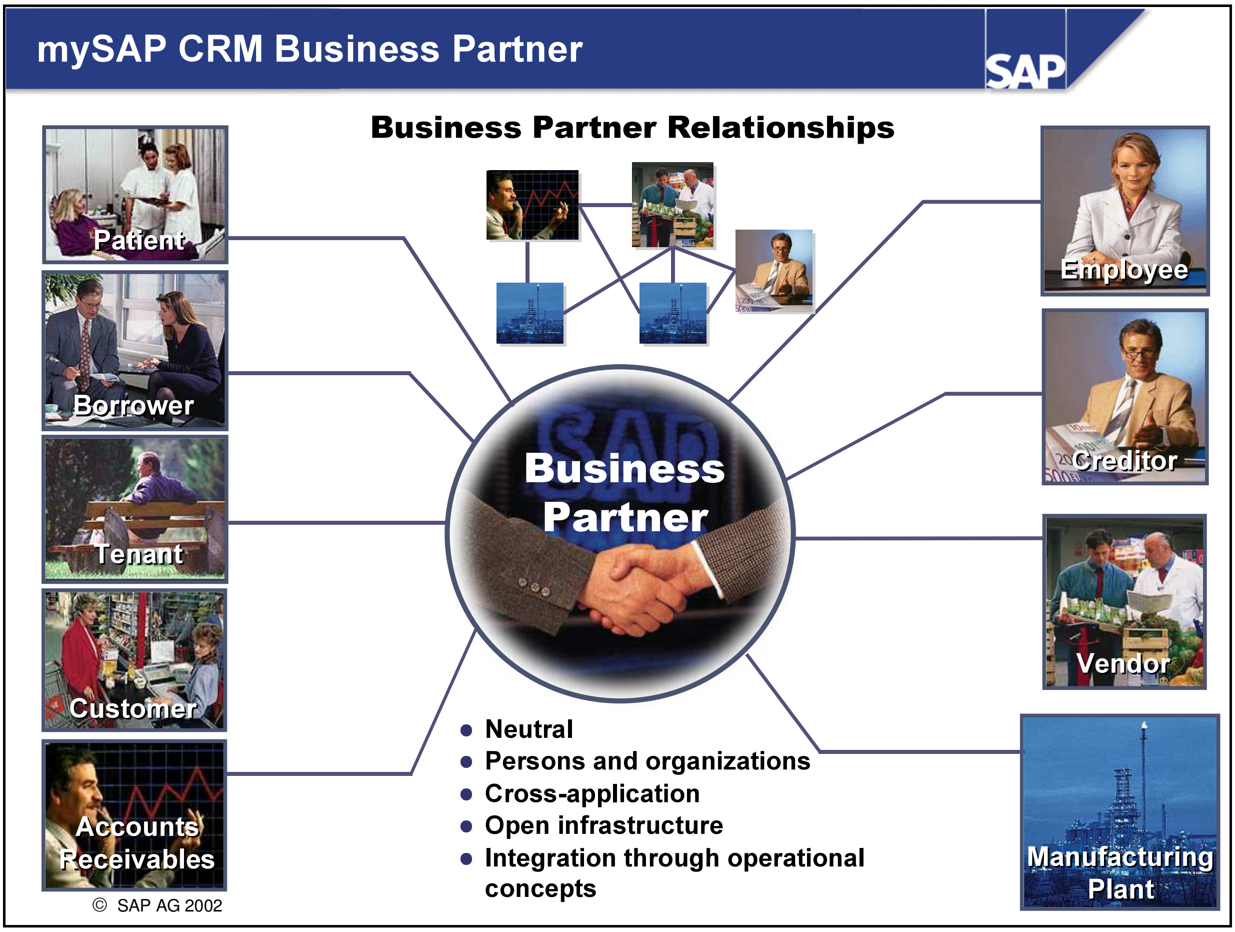
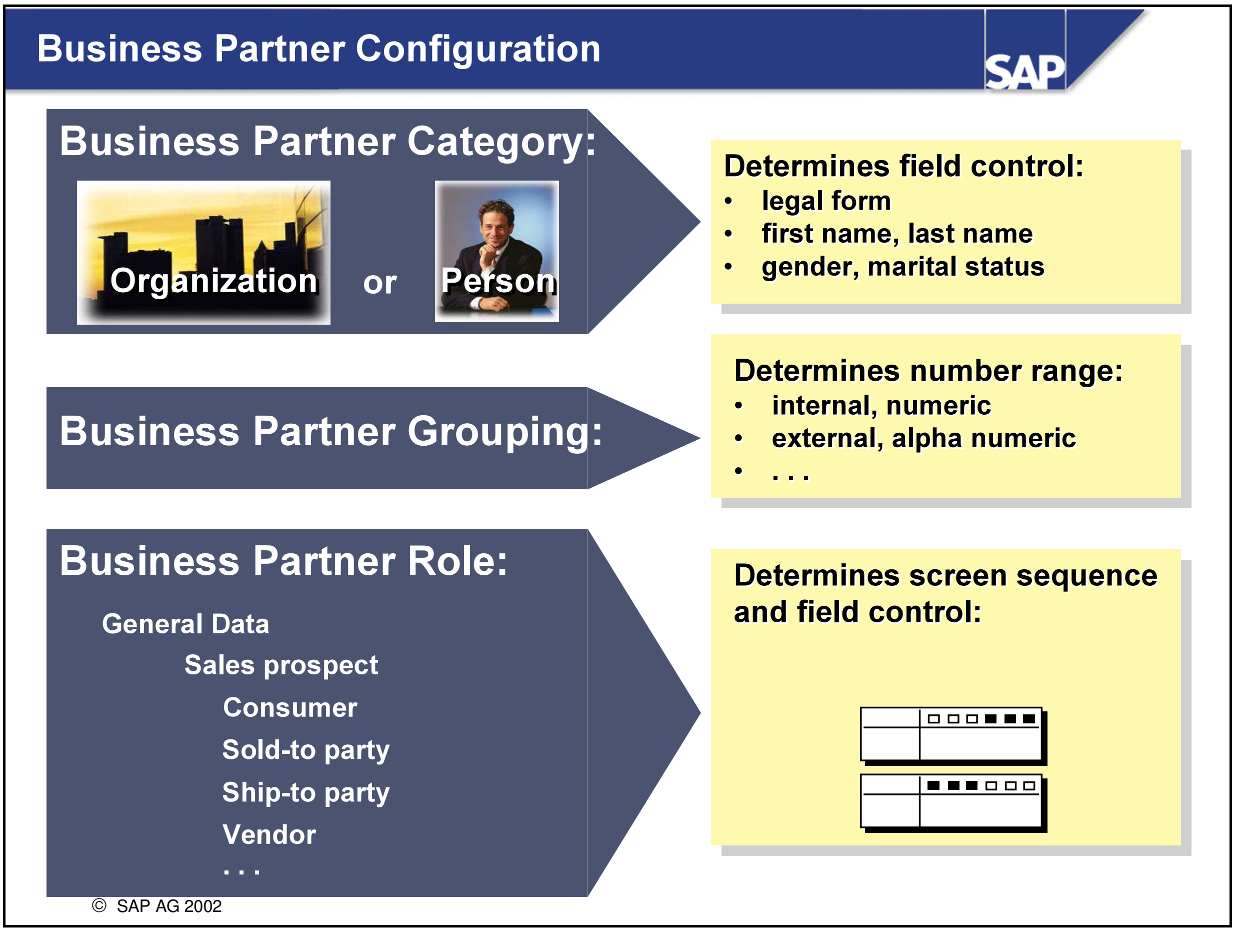
CRM Master Data: Business Scenario

- Since you are implementing various CRM scenarios at IDES, Inc., you need to become familiar with the basic elements involved in CRM processes.
- First, we will focus on:
  - Business Partners
  - Products

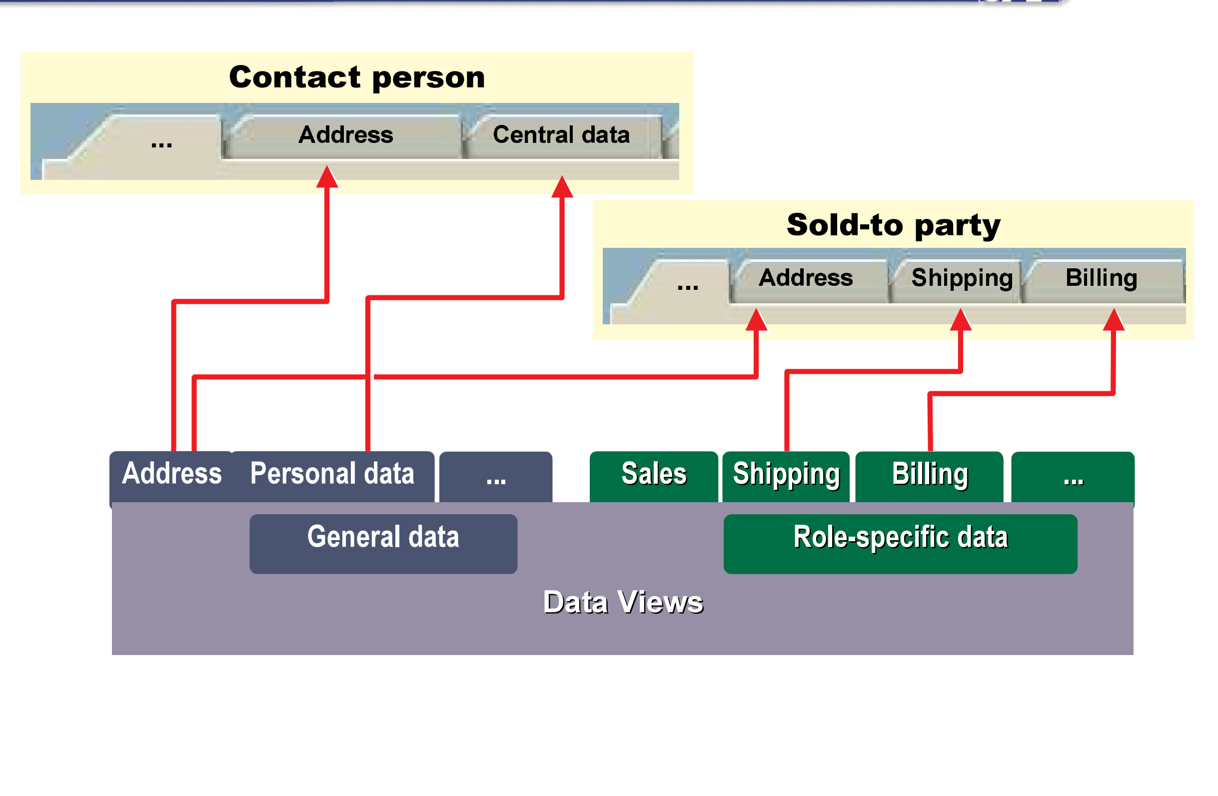


- Business partners are at the center of business transactions, and thus the center of business interest. All relevant information about a business partner must therefore be available quickly in consolidated form. The customer therefore needs to have a central and comprehensive view of the business partner.
- A business partner can only be created once, regardless of the business transactions in which they participate. For example, if a company is both a customer and a vendor, it is still one and the same business partner.
- However, a business partner can figure in a company in other ways. Depending on the specific business processes in which a business partner participates, the information required about the business partner may vary considerably. For example, for the goods delivery process, information on Incoterms and delivery conditions is required, whereas for the sales order processing, information on delivery dates and payment conditions is relevant.
- A business partner can be in contact with other business partners. These relationships can be very different in nature (for example, a marriage, contact person, company relationships).
- The *SAP Business Partner* provides functions that fulfil these business processes. A business partner is created only once in the system, but can take on several different roles. The different relationships between business partners can also be defined.



- A business partner category classifies a business partner as a person (e.g., private individual), or organization (legal entity or part of a legal entity, such as a department). When a business partner is created, a business partner category must be selected (required entry). Only one business partner category can be created, and this cannot be changed at a later date.
- The business partner category determines in which fields the user can enter data. For example, when you want to create a business partner as an organization, one of the fields requires you to enter the legal form, whereas when creating a business partner as a person, you have to enter first name, other name components, gender, and so on.
- The information in the grouping field determines whether and how the business partner number must be entered in the business partner field. When you first create a business partner (BP), you must state the BP category and the grouping. If you use a grouping to which a number range with external number assignment has been assigned, you must enter a number in the BP field. In the event of internal number assignment, you leave this field empty.
- The basis for the definition of a BP role is a business process. The attributes of the BP role depend on the particular business process involved. BP roles are used to determine screen sequence and field control of the BP master records.
- You can create a business partner with one or more BP roles. Personal data, such as name, address, and bank details, only has to be created once.

Data Views for Business Partner (BP) Roles



- According to the role selected for the business partner, varying data and data views are available.
- In CRM, the following data views are available:
  - General views: Address, Address Overview, Central Data
  - Specific views: Classification, Business Hours, Partner Functions, Excluded Partner Functions, Sales Area Data (Sales, Shipping, Billing)
  - Relationships
  - Fact sheets
- For business processes that refer to a business partner, the system accesses different areas of the business partner master data. You can maintain different sets of data in various sales areas for the different BP roles that a business partner can take on.
- Extract from data view - sold-to party role:

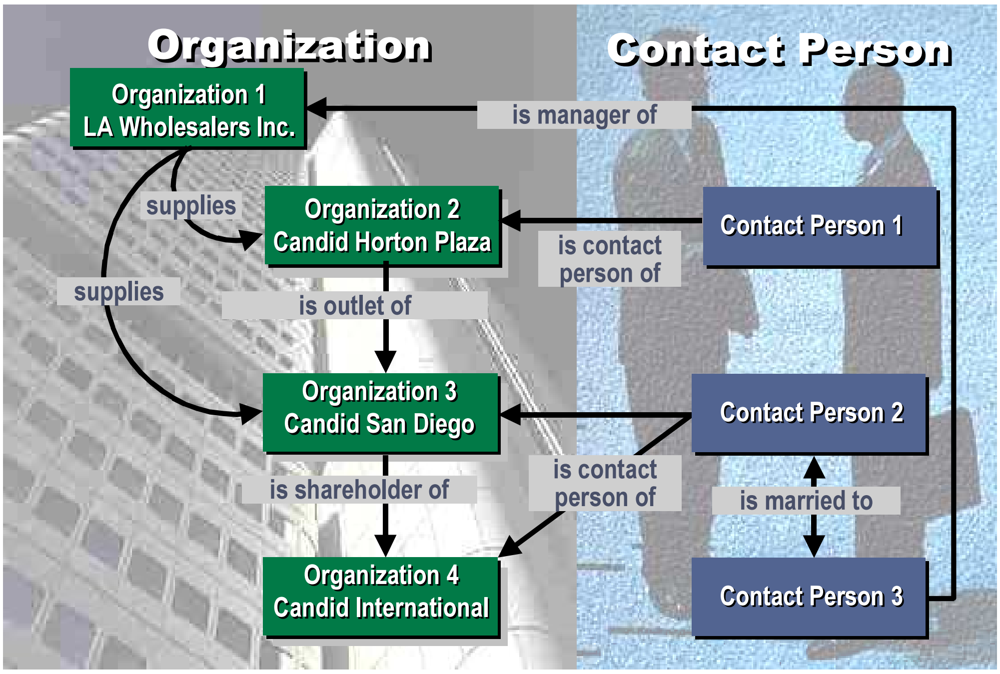
  Address, Address Overview, Central Data: Organizational Data, Sales Area Data

  Classification / Business Hours, Partner Functions, Excluded Partner Functions
- Extract from data view - contact person role:

  Address, Address Overview, Central Data: Personal Data, Status
- Extract for data view - employee role:

  Address, Address Overview, Central Data: User, Status

Business Partner Relationships



- You can assign a relationship to various **business partner relationship types**, such as *is contact person for, is department of, is married to, is vendor for, is customer of, is competitor of,* and so on.
- Each relationship can have particular attributes and directions assigned to it.
- Relationships are not transferred to R/3.

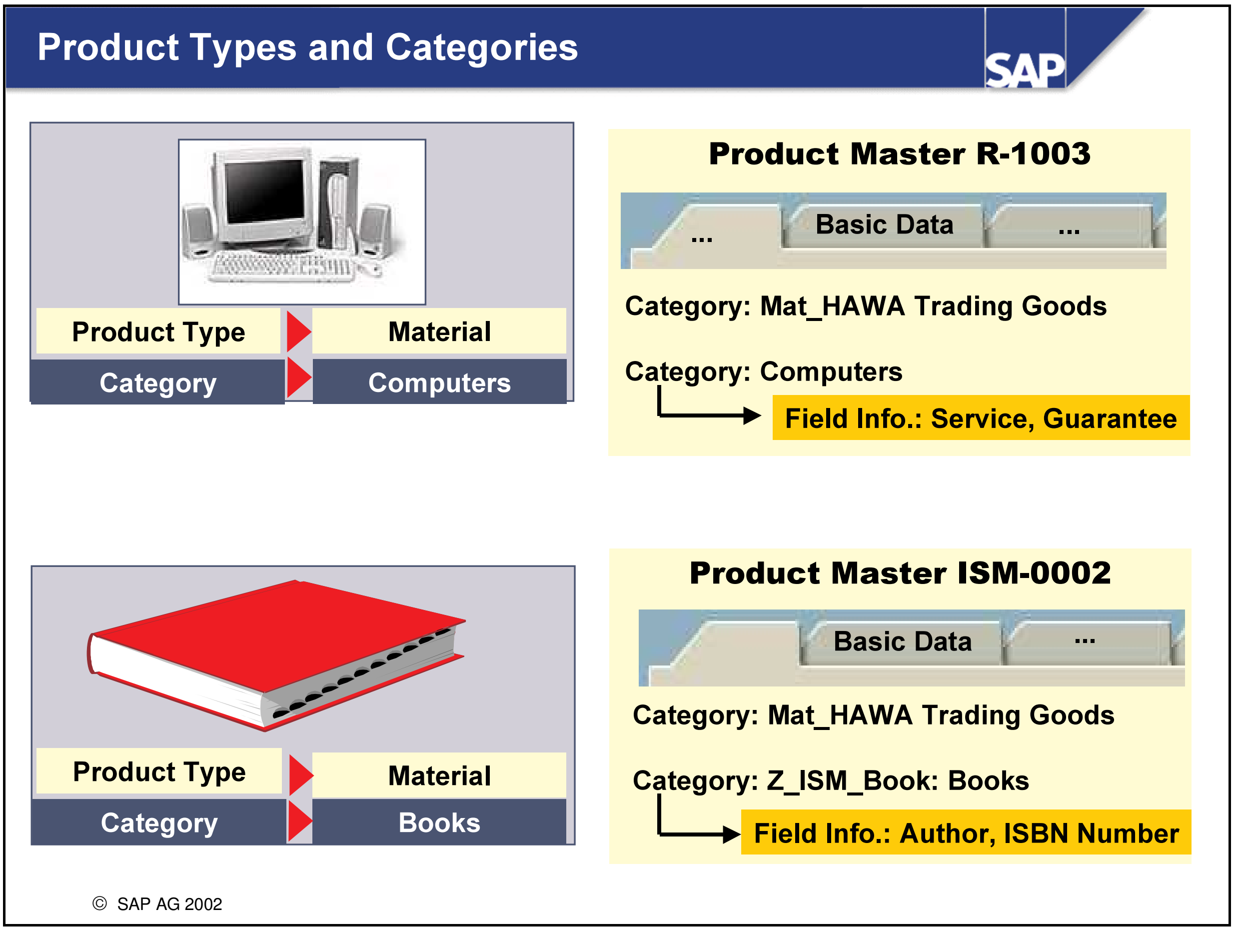
CRM Product Master

In CRM, products are differentiated according to product categories:

Material	Service	Financing
		

- The product master delivers information about all the products a business buys and sells. Products can be material goods (for example, a PC) or non-material goods (such as services like PC maintenance).
- The product master is the central source of product-specific data. This data is stored in individual product master records. A product master record contains the data needed for product management. This data can be sub-divided as follows:
  - Data that describes the product (such as size and weight)
  - Data with control functions (such as item category group which determines the item category of items in a CRM sales order)
- In order to contro product-specific data, product master data is split up in to the following groups (product categories):
  - Material: All products in the conventional sense, for example, PCs, tables, lamps, software
  - Service: All services, such as maintenance, preventative maintenance
  - Financing: Financial products, such as leasing

  Different product-specific data is obtained according to the selected product category.



- Products can be summarized into hierarchically structured groups, or **product categories.** Product categories make it possible to group together products according to different criteria (**set types**). You can maintain freely definable CRM-specific information (attributes) via these criteria (set types).

- In product maintenance, the set types assigned to a product appear as sub screens with respective attributes in the various views (on the tab pages such as *Basic Data*). This additional CRM-specific information can be used, for example, for grouping your products in product catalogs.

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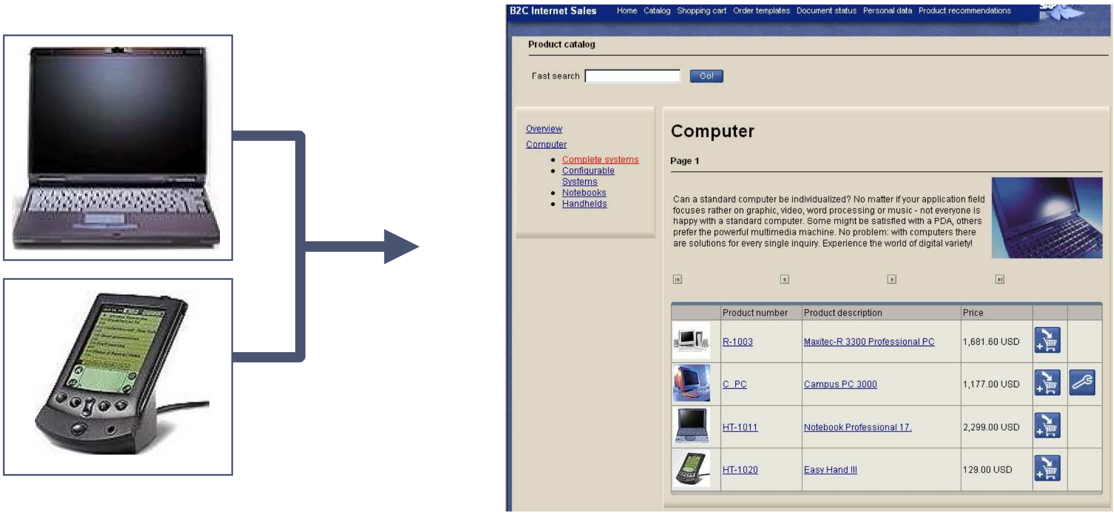
What is a Product Catalog?

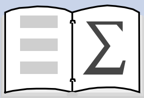
Product Catalog



- **Used for presenting products on the Internet (products are based on CRM product master data)**
- **Can be flexibly defined and maintained in the CRM System**

- Product catalogs are used in SAP Internet Sales.
- Product catalogs can be freely defined and configured. CRM-specific information and attributes can be used here to help you organize and structure your products.
- The general structure of a product catalog is characterized by:
  - Validity period: Period during which the product catalog is valid
  - Basic characteristics list:
    Lists the characteristics of all products contained in the catalog; it is used to search for products on the Internet
  - Administration data:
    Specifies the date of creation and the name of the user who created the object
  - Sie können einen Katalog in mehreren Sprachen und Varianten erzeugen.
  - Product catalogs are used in a variety of different business scenarios, such as Business-to-Business or Business-to-Customer Internet Sales (see Internet Sales Unit)

CRM Master Data: Unit Summary



You are now able to:

- Define business partners and how they are used in CRM
- Define products and product catalogs and how they are used in CRM

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Exercises

Unit: Master Data

Topic: Business Partners and Relationships

At the conclusion of this exercise, you will be able to:

- Create a business partner in CRM
- Create a relationship for the business partner
-

You want to create a new business partner, Sandra Copley, in CRM. You want to store the information that this business partner is a shareholder in another business partner, Computer & More Inc. (BP 3961).

1-1 Create the new business partner Sandra Copley with the following information.

1-1-1 Navigate to the *Maintain Business Partner* transaction.

1-1-2 Create the business partner as *Partner Category* **Person** with the following details:

Address Tab

Business Partner:	**(number will be automatically generated)**
Create in Role:	**Business Partner (general) new**
Grouping:	**Internal number assignment**
First Name:	**Sandra**
Last Name:	**Copley ##**
Search Term 1:	**Copley ##**
Street/House Number:	**Westlake Court / 8333**
Postal Code/City:	**83432 / Aurora**
Country:	**US**
Region:	**CO**

Central Data tab

Sex:	**Female**
Marital status:	**1 (Married)**

Save your data and note the business partner number given by the system.

1-2 Sandra Copley ## is a 2% shareholder of Computer & More, Denver CO (Business Partner 3961). Define this relationship with your new business partner.

1-2-1 Navigate to the business partner you created in 1-1-2 and view this in the change mode. In which role was your business partner created or maintained?

1-2-2 Create for your business partner, Sarah Copley ##, a relationship with Business Partner 3961 - *Relationship Category*: **Is shareholder of**.

Relationship Category: ***Is shareholder of***
Relationship to BP: **3961**
Shareholding Data **-** *percentage***: 2**

1-2-3 Call the business partner Computer & More, Denver CO (No. **3961**). View the relationship defined there.
You can call up the business partner using the *Open* icon.
Which relationship is displayed there? How was it maintained?

You can call up the business partner using the *Open* icon and BP No. 3961, or by selecting the F4 Help tab page *Partner, general,* and entering **Computer*** in *Name 1/Last Name*.

1-3 Display all relationships for Data Livestream (search term: MSA).

1-3-1 Call the business partner Data Livestream (3031) as in Exercise 1-2-3, or use the search locator (search term: **MSA**) and select Data Livestream (3031).

1-3-2 View the relationship for Data Livestream (3031) and list it.

Relationship Category	**Business Partners**	**Name**
______________________	______________________	______________________
______________________	______________________	______________________
______________________	______________________	______________________
______________________	______________________	______________________
______________________	______________________	______________________

1-3-3 View the *Relationship* ***Has contact person*** in Hierarchy and Network format.

Exercises

Unit: Master Data

Topic: Products

At the conclusion of this exercise, you will be able to:

- Display and navigate the product master
-

Each course participant should be able to review information in CRM product master files.

2-1 Review information about a product in CRM.

2-1-1 Call the product **R-1003** Maxitec-R 3300 Professional PC in CRM and list the following product information:

How many *Product Categories* are maintained for this product? Which ones?

____

____

Usage Area: ______________________________________

Warranty: ____

Base Unit: _______________________________________

Division: ____

Gross Weight: ____________________________________

From the locator in the product master, select the ***Search*** tab.

Select **Material** in the *Search* field and enter **R-1003** or **R-100*** in the *ID/Description* field.

Choose ***Start***, and then select the material and the magnifying glass for details.

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CRM Master Data - Exercises

Optional Exercises

Unit: Master Data

Topic: Product Catalog

At the conclusion of this exercise, you will be able to:

- View a product catalog and view various types of information pertaining to the catalog.
-

You want to know which products are in your PC Shop product catalog.

3-1 Navigate to the PC Shop catalog.

3-1-1 Select *Product Catalog* **PCSHOP** using F4 Help, then *Catalog type:* **Both**.

3-2 List the Notebooks in the PC Shop catalog that are listed in the Computer section.

Stay on this screen to complete the next exercise.

3-3 Display a picture of Material HT-1000 in the PC Shop product catalog.

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Solutions

Unit: Master Data

Topic: Business Partners and Relationships

1-1 Create the new business partner, Sandra Copley, with the following information.

1-1-1 Navigate to the *Maintain Business Partner* transaction.

SAP Menu → Master Data → Business Partner → Maintain Business Partner

1-1-2 Create the business partner as *Business Partner Category* **Person** with the following details:

Select *Person* to create the business partner as partner category **Person**.

Address tab

Business Partner:	**(number will be automatically generated)**
Create in Role:	**Business Partner (general) new**
Grouping:	**Internal number assignment**
First Name:	**Sandra**
Last Name:	**Copley ##**
Search Term 1:	**Copley ##**
Street/House Number:	**Westlake Court / 8333**
Postal Code/City:	**83432 / Aurora**
Country:	**US**
Region:	**CO**

Central Data tab

Sex:	**Female**
Marital status:	**1 (Married)**

Enter the above information and select ***Save***. The business partner number is assigned automatically by the system.

1-2 Sandra Copley ## is a 2% shareholder of Computer & More, Denver CO (Business Partner 3961). Define this relationship with your new business partner.

1-2-1 Navigate to the business partner you created in 1-1-2 and display this in the change mode. In which role was your business partner created or maintained?

SAP Menu → Master Data → Business Partner → Maintain Business Partner

Your last entry is displayed. This should be the business partner you just created. If not, use the locator (business partner, search term: **Copley ##**). Make sure you are in the change mode. If not, you can change from the display to change mode by clicking on the icon.

In which role was your business partner created or maintained?

You can only see which business partners were maintained, if you are in the change mode. In this case, it is only the role **Business Partner General**.

1-2-2 Create for your business partner, Sandra Copley ## a relationship with Business Partner 3961 - *Relationship Category:* **Is Shareholder Of**.

Select ***Relationships*** from the application toolbar:

Relationship Category: ***Is Shareholder Of***
Relationship to BP: **3961 -** select ***Create*** or ***Enter***
Enter the Shareholding Data - percentage: **2**

Select ***Enter*** and **save** your data.

1-2-3 Call the business partner Computer & More, Denver CO (No. **3961**) and view the relationship defined there.
You can call up the business partner using the *Open* icon.
Which relationship is displayed there? How is it maintained?

You can call up the business partner using the *Open* icon and BP No. 3961, or by selecting the F4 Help tab page *Partner, general,* and entering **Computer*** in *Name 1/Last Name*.

The relationship you just created for business partner 3961 is mirrored automatically in the relationship type "***Has shareholder***."

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1-3 Display all relationships for the business partner Data Livestream.

1-3-1 Call the business partner Data Livestream (3031), as in Exercise 1-2-3, or use the search locator (search term: **MSA**) and select Data Livestream (3031).

SAP Menu → Master Data → Business Partner → Maintain Business Partner

You can call the business partner using the *Open* icon and BP No. 3031, or by selecting the F4 Help tab page and entering **Computer*** under *Partner general name1.*

or

Search for the business partner using the locator as *Business Partner* and by *search term*. Enter Search Term 1: **MSA** and *Start* to execute the search. Select Data Livestream 3031 in the list and choose the ***Select*** icon (Magnifying glass).

1-3-2 Display the relationship for Data Livestream (3031) and make a note of this.

Select ***Relationships***.

To view all relationships select the ***Overview*** tab, and *Relationship* category: **ALL.**

Relationship Category	Business Partners	Name
Has contact person	101	Dr. Andrew Welsh
Has contact person	102	Dr. Mary Twain
Has contact person	103	Dr. Evelyn Englert
Has the employee responsible	292	Mike Smith

1-3-3 Display the *Relationship* ***Has contact person*** in Hierarchy and Network format.

Select the *Has contact person* tab. Select the Hierarchy *View*, and then switch to the Network *View*.

Solutions

Unit: Master Data
Topic: Products

2-1 Review information about a product in CRM.

2-1-1 Call the product **R-1003** Maxitec-R 3300 Professional PC in CRM and list the following product information:

From the locator in the *Product master*, select the **Search** tab.

Select ***Material*** in the *Search* field and enter **R-1003** or **R-100*** in the *ID/Description* field.

Choose ***Start***, and then select the material and magnifying glass for details.

SAP Menu → Master Data → Business Partner → Maintain Products

Follow the instructions above and select *Search* **Material**, *ID/Description*: **R-100*** or **R-1003**, then ***Start***.

Select Material **R-1003** from the list by clicking on it, or select the *Magnifying glass* icon.

SAP Basic Data tab page.

How many *Product Categories* are maintained for this product? Which ones?

There are 5 product categories: PC Ensemble, Electronics/Hardware, Complete Systems, Finished Products, and Computers

Area of Usage:	C (Industry)
Warranty	LIFELONG
Base Unit:	Units
Division:	07 High Tech
Gross Weight:	33 kg

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Solutions

Optional Exercises

Unit: Master Data

Topic: Product Catalog

3-1 Navigate to the PC shop catalog.

SAP Menu → Master Data → Business Partner → Maintain Product Catalog

3-1-1 Select *product catalog* PCSHOP using F4 Help, then *Catalog Type: Both.* Select *Display*.

3-2 List the Notebooks in the PC Shop catalog that are listed in the Computer section.

Go to the navigation area on the left side of the screen and select:

PCSHOP → 1Computer→ 1.3 Notebooks, *and then click on* ***Notebooks.***

Products listed are:

HT-1000 Notebook Basic 15

HT-1001 Notebook Basic 17

HT-1010 Notebook Professional 15

HT-1011 Notebook Professional 17

3-3 View a picture of Material HT-1000 in the PC Shop product catalog.

Double-click **HT-1000**.

Select Document Type **CRM_IMAGE** from the *Item Documents* tab page, and click on the *Page* symbol. A picture of the notebook should appear.

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Business Transactions in CRM

Contents:

- Business transactions in CRM and their structure
- Activities
- Leads
- Opportunities
- Sales transactions
- Contracts
- Service processes
- Complaints

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Business Transactions in CRM: Unit Objectives

At the conclusion of this unit, you will be able to:

- **List various CRM business transactions**
- **Describe the structure of business transactions**
- **Describe the document flow between business transactions**

Course Overview Diagram

Marketing | Sales | Service

Task

Customer

Relationship

Management

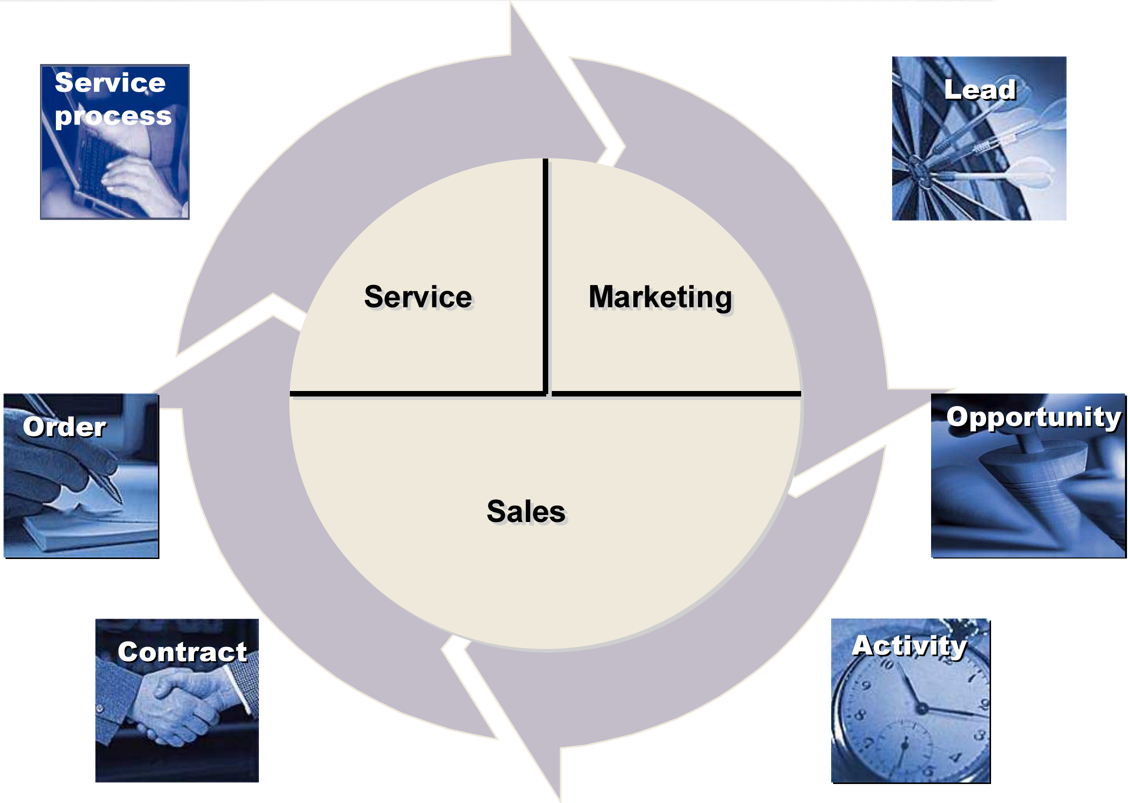
Contact Channel

Interaction Center

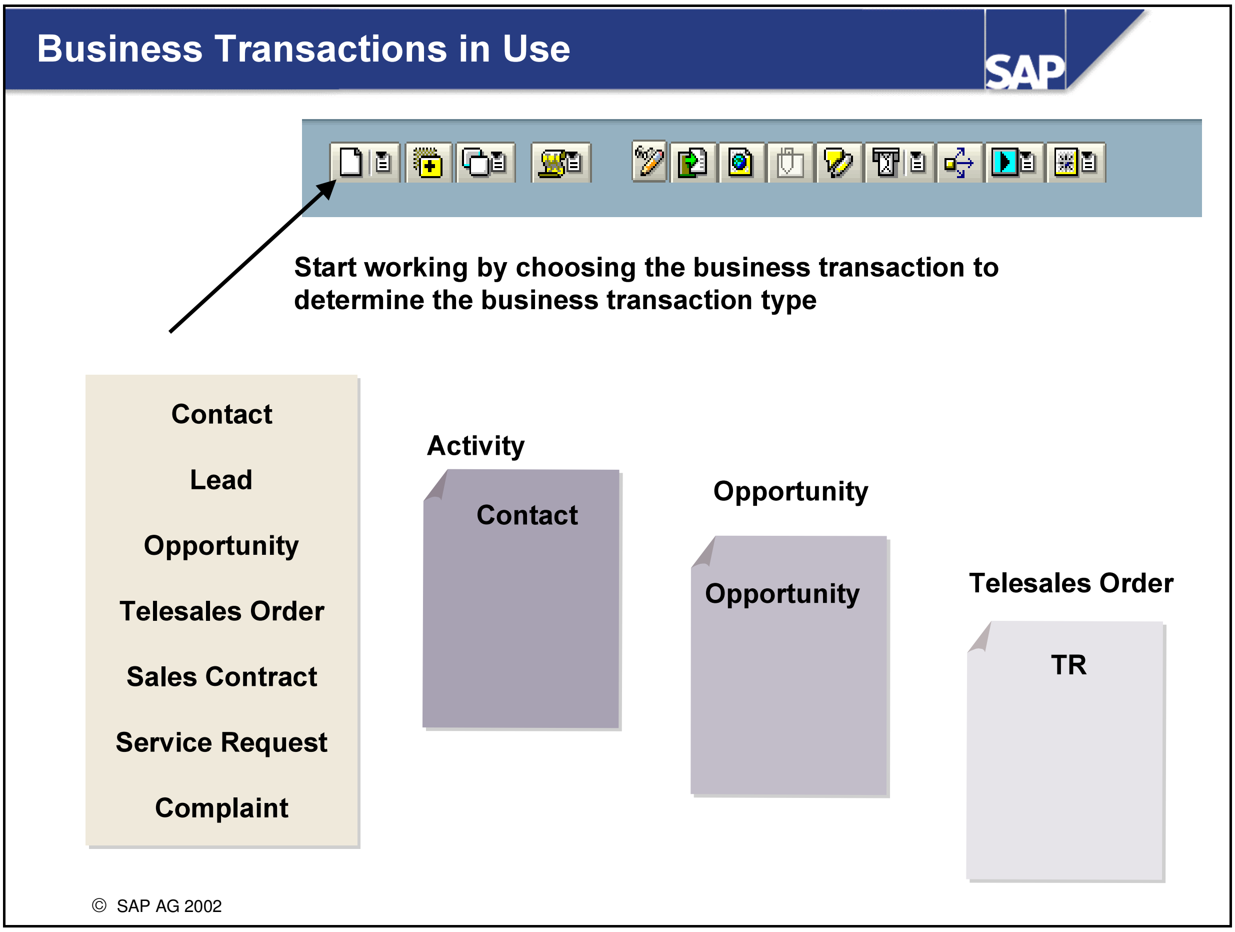
Internet

Mobile

Business Transactions in CRM: Closed Loop



- A business transaction in CRM portrays a business event, such as a sales order, service order, activity (for example, a telephone call), or an opportunity.
- A special transaction type determines the qualities and characteristics of a business transaction (for example, sales order, service request, or sales call).
- For individual tasks such as marketing, sales, and service, there are various task-relevant business transactions for each phase. Leads may be used in the marketing phase, for example; and opportunities, contracts and sales orders may be appointed in the sales and distribution processing phase. Activities, such as telephone calls and customer sales calls can be appointed in all phases.
- Contracts in CRM are also based on the concept of business transactions. Presently, contract types have been implemented for Sales (quantity and value contracts) and service contracts.
- If you receive customer complaints concerning products delivered or services rendered, you can also employ special business transactions for complaint processing (for example, for returns).



■ All business transactions available in CRM Online are based on a common interface and processing concept.

■ The transaction processing interface serves to create, change, and display business transactions in CRM.

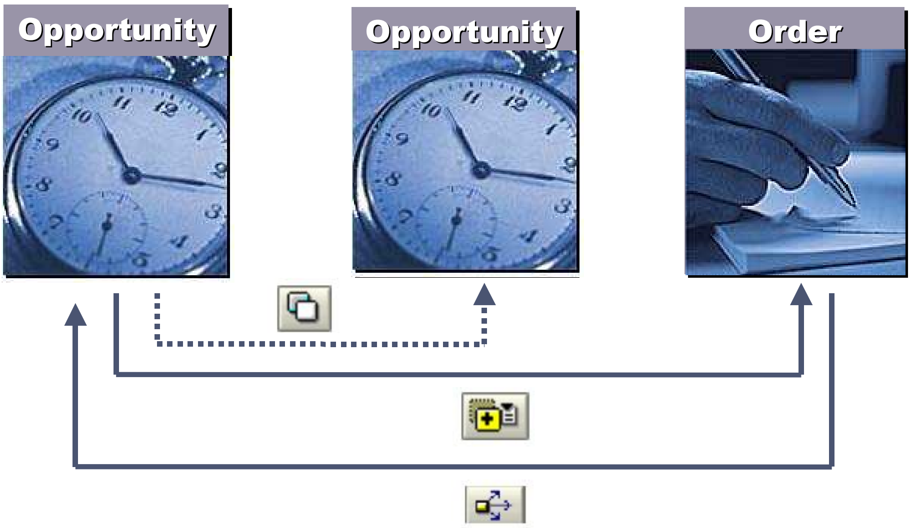
■ This interface is used for all CRM business transactions, such as Leads, Activities, Opportunities, Service Processes, Sales Transactions, or Contracts. They are always displayed in the same format. Only individual fields may change, according to the transaction type being processed at the time.

■ The following elements are used in the screen for transaction processing:

- Locator:
  This enables you to find any transaction or business partner you want to process.

- Work Area:
  Here you can create, change, or display transactions. It is divided into the areas Header, Standard Toolbar, Application Log, Tab Pages, Item Lists, and Item Details.

Copying Business Transactions and Their Document Flow



Copy

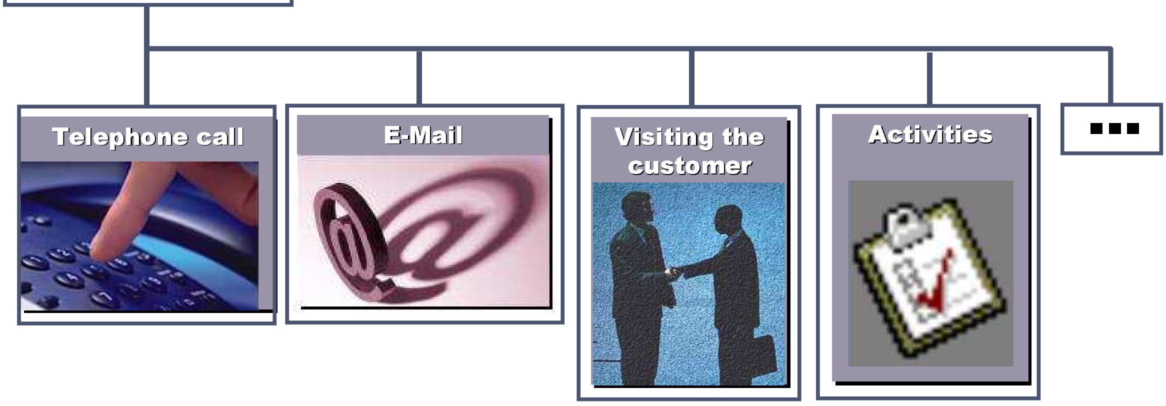
Create Follow-Up Document

Document Flow Display

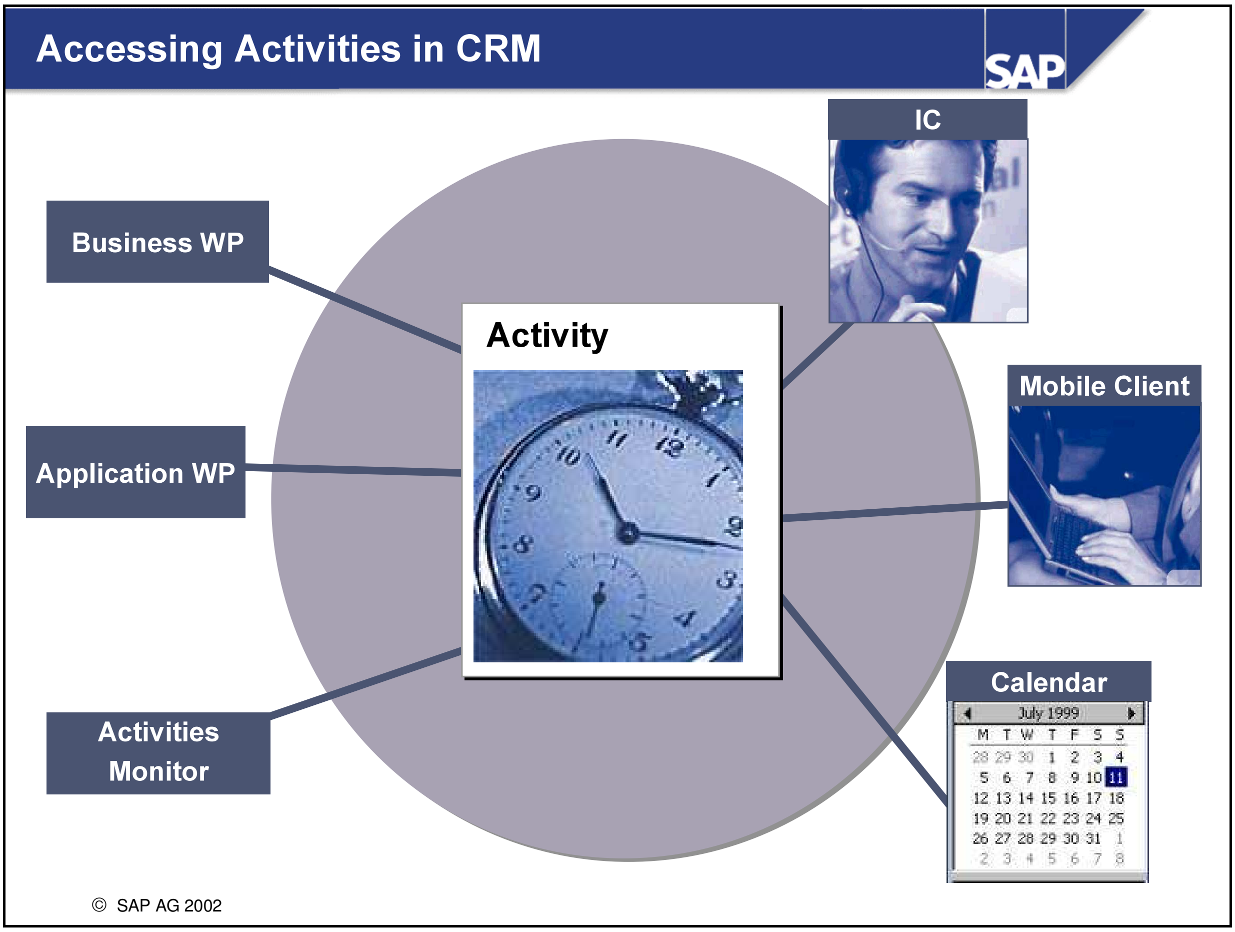
- Business transactions created in CRM can be used as a source document when creating documents with reference. This allows the user to not only copy relevant information from the source document, but to also track the documents that reference each other.
- **Copy**: only copies current transaction
  - Same transaction type
  - Header and item data copied
  - Document flow is not updated, i.e., no reference to original document
- **Create Follow-Up Document**
  - You can choose the transaction type for the follow-up document, e.g. opportunity to order
  - Header data is copied and you can select items
  - Document flow is updated
- **Document Flow Display**
  - Shows document flow with documents created as follow-up documents

What is an Activity in CRM?

- **Transaction type**, in which information on partner sales activity in the customer engagement lifecycle is entered.
- **Activities are subdivided into** business activities **and** tasks**.**

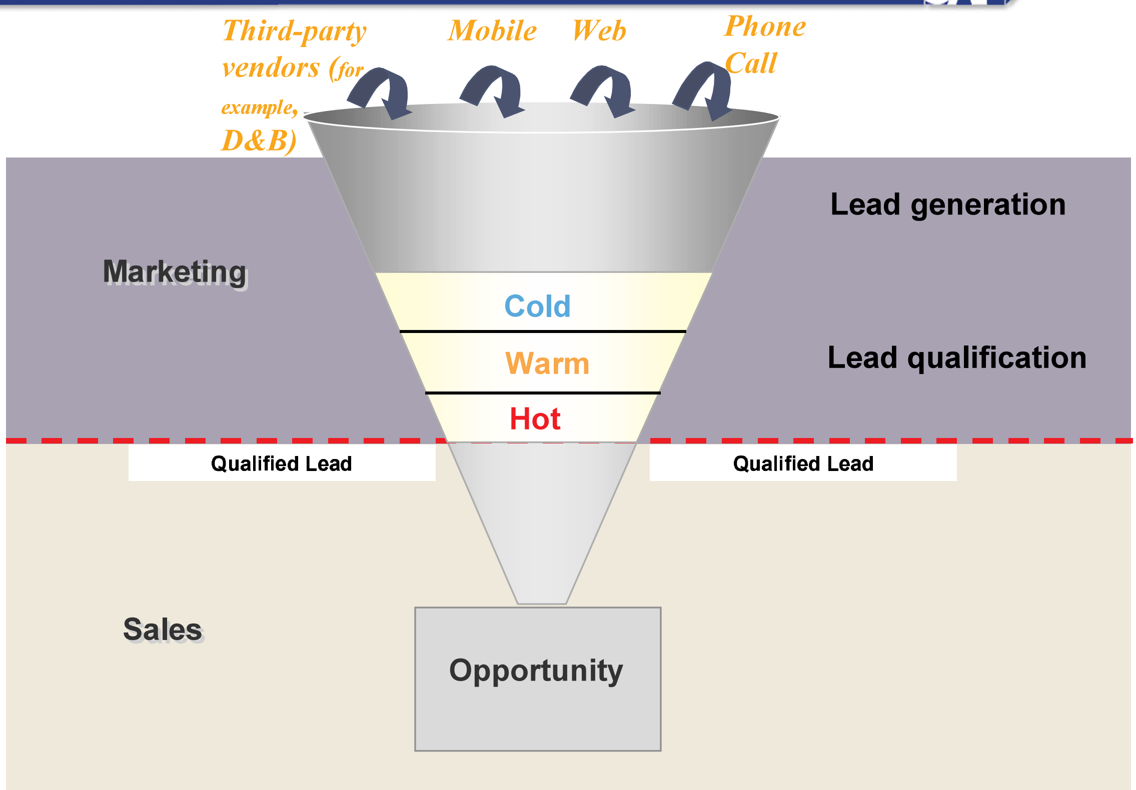


- The Activity Manager is an important component of CRM and manages all activities to which your company employees may have contributed. All data stored in an activity is an important source of information that all relevant employees must have access to.
- An activity is a transaction type used to record information resulting from interaction between business partners, undertaken at any time during the customer relationship life cycle.
- Activities can be planned, tracked, documented, or administered by user or user group.
- Activities are subdivided into business activities and tasks.
  - A business activity is an activity type that contains data on an interaction with a business partner at a specific time.
  - A task is an activity type that contains information on which activities have to be carried out by one or more employees by a specific date.
- Activities can be linked to the SAP Business Information Warehouse (SAP BW) for management reporting needs.
- Examples of activities are telephone calls, customer visits, preparatory tasks, or private reminders.



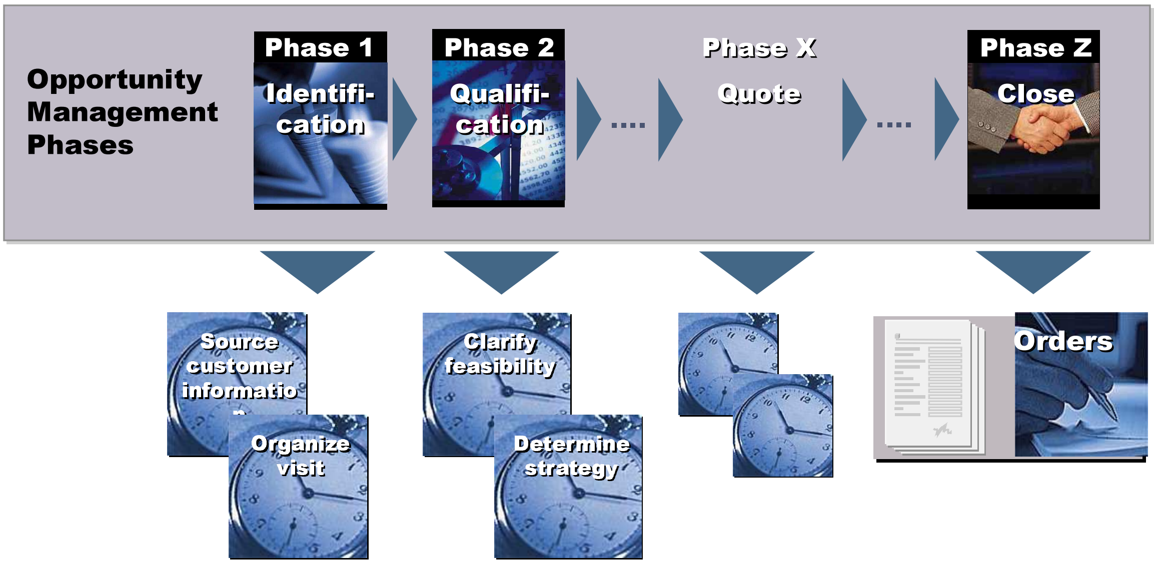
- You can access activities in different ways in CRM:
  - Directly in the business or application workplace
  - From a CRM scenario, e.g., in call center or mobil client
- The Activity Monitor enables you to call a list of all activities created in the system according to various criteria. The Activity Monitor contains three selection variants:
  - My unfinished activities
  - Unfinished activities in my department
  - Unfinished activities by my colleagues
- Within the activity you can define information such as category (visit, telephone call, e-mail), priority, status (open, in process, finished), or the objective (arouse interest, customer service).
- Activities can be created and changed in the calendar. The calendar can be synchronized with MS-Outlook.
- Activities can be created in CRM Online as well as in the mobile sales application. Activities are exchanged between systems via Middleware so you always have the latest information on your activities.

Business Transactions: Leads

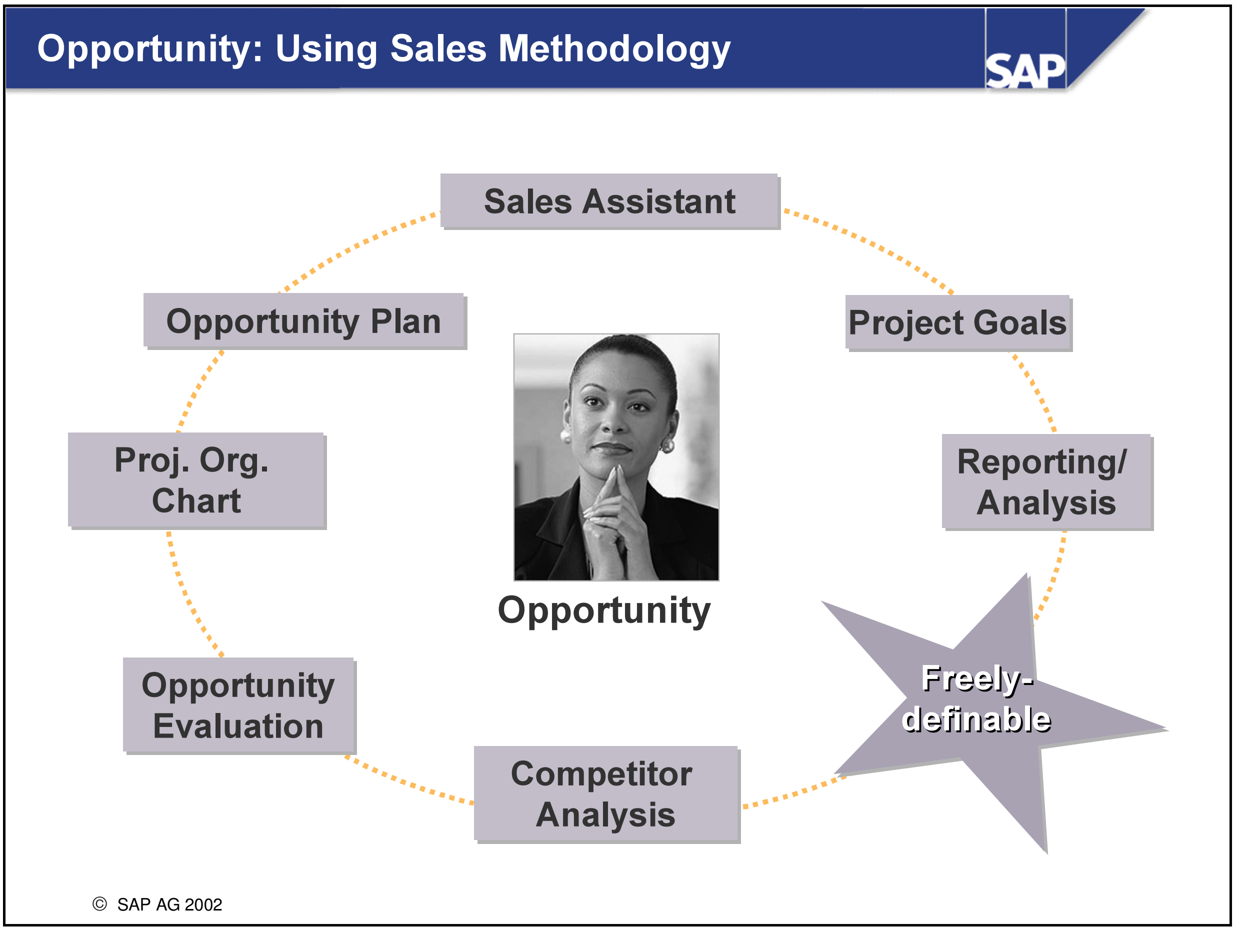


- Lead Management serves to automate advance sales activities, thereby creating freedom for Sales to concentrate on promising prospects and opportunities.
- Leads are business transactions created and managed in Marketing.
- The Lead Management process consists of the following phases:
  - **Lead generation:**
    Lead generation can take place on the basis of inbound or outbound business activities with business partners.
  - **Lead qualification:**
    Lead qualification is an iterative and interactive process that can be processed a number of times in a lead during a specific period of time. So long as the lead has reached a specific qualification level (for example, Hot), it can be changed into an opportunity and be transferred to Sales for further processing.
  - **Lead reporting:**
    Strategic reporting functions are available to Lead Management and upper management levels to enable the lead degree of success to be measured.
- Note:
  Use of Lead Management is optional.

Opportunity Management in CRM



- Opportunity Management is the editing process for opportunities. The aim of this is to generate as many orders as possible within an optimized sales process. Sales processes become more transparent through using Opportunity Management, and can be monitored and evaluated more efficiently.
- It is particularly worthwhile using Opportunity Management when:
  - A large number of sales employees are active
  - High-value sales orders are placed
  - Sales cycles stretch over a long period of time
- An opportunity passes through a sales cycle that is marked by different phases. A **phase** is a section of the sales cycle (for example, identification, qualification) in which specific activities are executed.
- Sales cycles and the phases in a sales cycle can be defined according to company-specific requirements (for example, different sales cycles and phases for new customer business, as opposed to existing customer business).
- Opportunities can serve as a central shell for the entire sales process, from which activities, quotations, contracts, and tasks can result.



- The quality of the sales process has a large influence on success. A structured sales methodology enables sales projects to be controlled optimally, thereby increasing the quality of the sales process substantially.
- From Release 3.0 a sales methodology geared towards company-specific sales processes can be displayed and employed within Opportunity Management. Employees are led through an optimal sales process - from identifying a sales lead to concluding a sale.
- The sales methodology consists of the following modules:
  - Sales assistant
  - Project goals
  - Project organization chart (Buying Center)
  - Competitor analysis
  - Opportunity evaluation
  - Opportunity plan
- Note:
  Sales methodology functions in Release 3.0 are only available in CRM Online. These functions will also become available for CRM Mobile at a later time.

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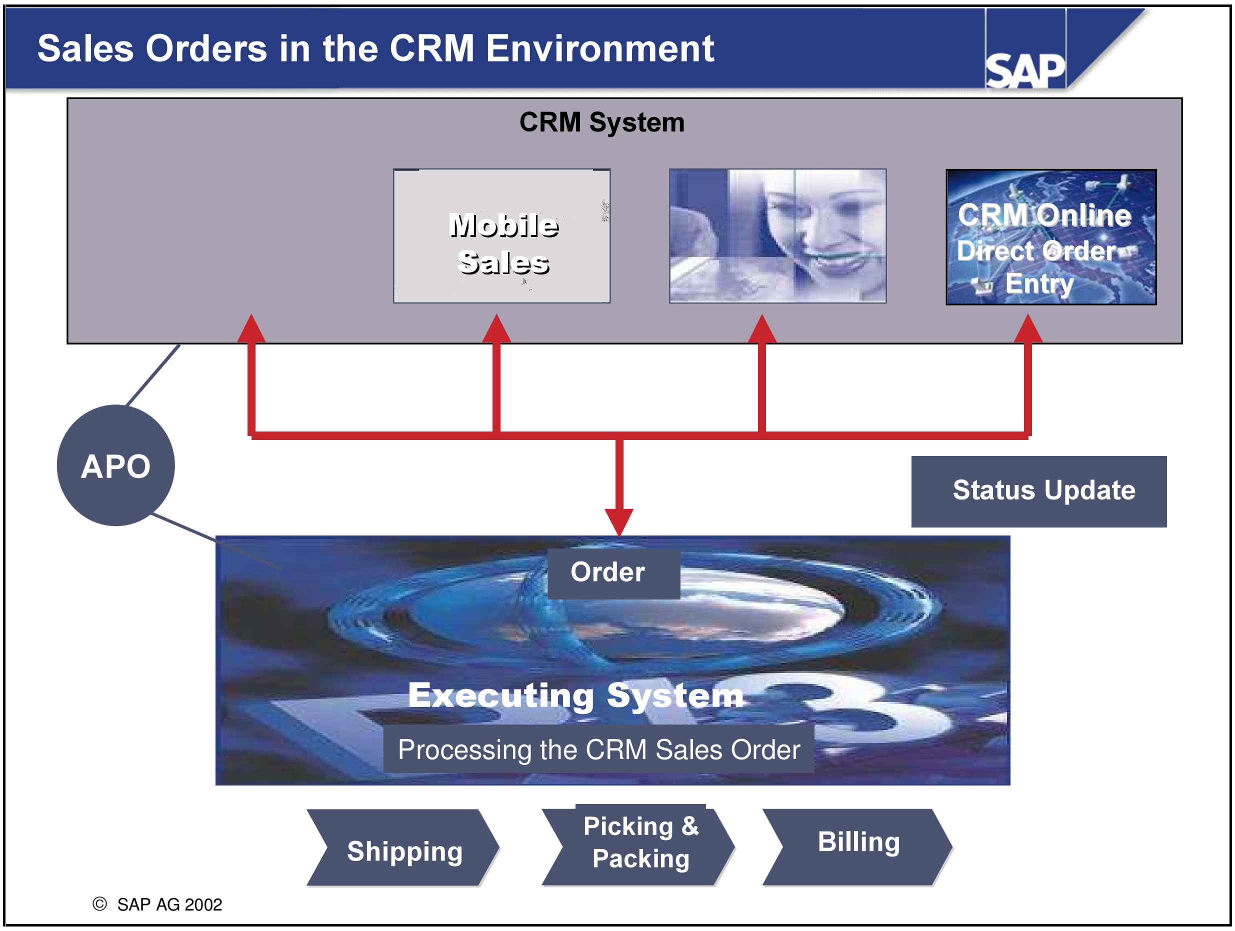
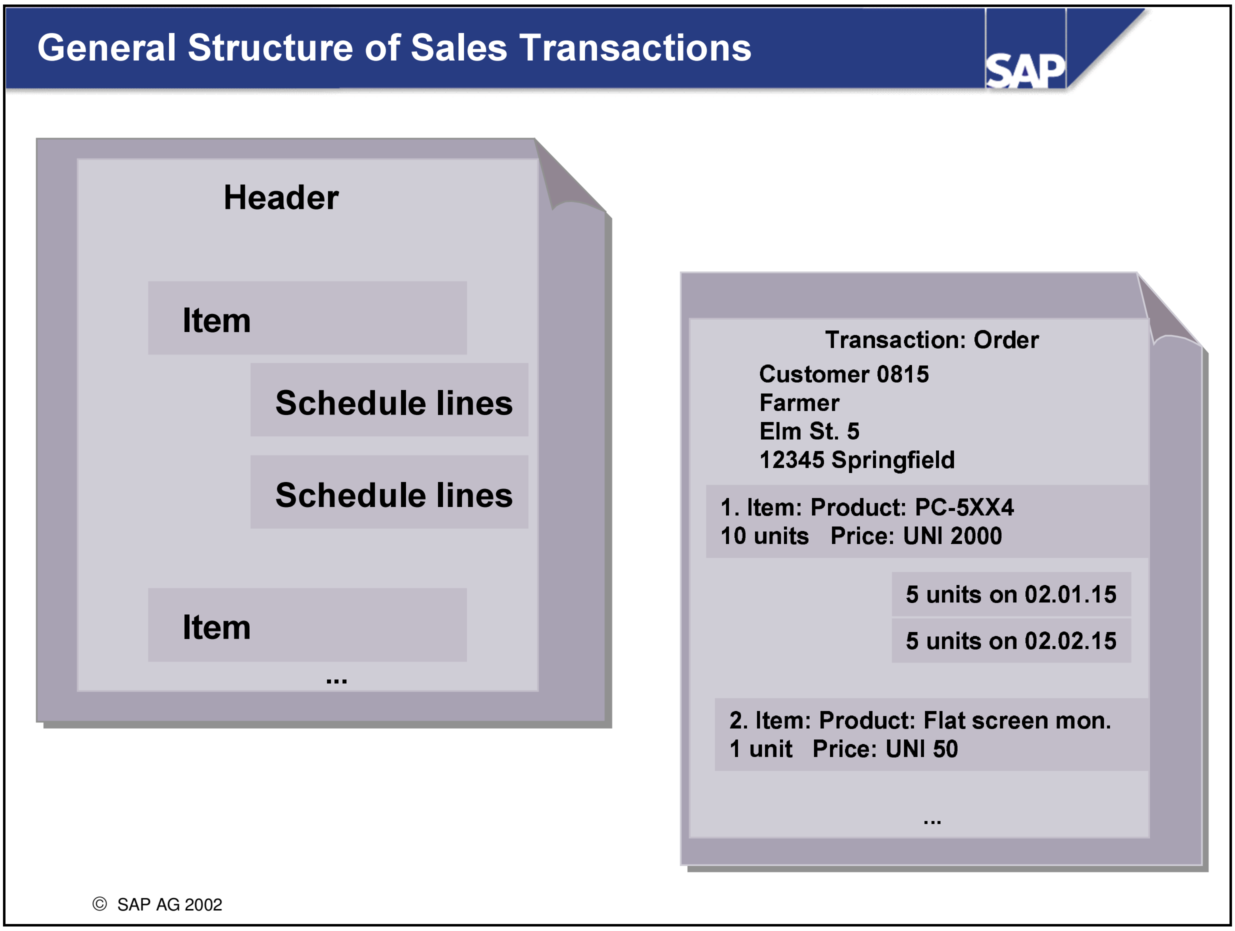


- Sources for CRM sales orders are:
  - **Telesales:** Through the CIC, the agent can create a sales order directly in CRM.
  - **Mobile Sales:** The mobile sales representative can enter an order in their laptop or PDA and have the order transferred to CRM via Middleware.
  - **Internet:** Orders can be created in SAP Internet Sales in CRM and transferred to R/3 for execution.
  - **CRM direct entry:** Orders can be entered directly in CRM regardless of channel via the function Process Sales Transaction.
- Orders come from various sources, but ultimately they are executed in R/3 and get a status update from there.
- When creating a CRM sales order, the following functions are supported:
  - Product pricing and product configuration via the Internet Pricing and Configurator (IPC). R/3 conditions from the pricing viewpoint are downloaded into CRM. Knowledge base information on the R/3 variant configuration from the variant configuration viewpoint is downloaded into CRM.
  - Real-time Available-to-Promise (ATP) checks by using SAP Advanced Planner and Optimizer (APO).



- The uniform structure of the business transaction makes it possible for different transaction types to have essentially the same structure. Business transactions that serve to process sales processes (for example, quotations and sales orders) have the following structure:
- Header data:
  - Header data is general data that applies to the whole document,
    for example: sold-to party, purchase order number, transaction type
- Item data:
  - Item data consists of entries that are valid for these items only, for example, product number, quantity and price (item value)
- Schedule lines
  - Subdivides an item according to quantity and delivery date; an item can contain any number of schedule lines
- Other business transactions may use only subareas of the structure described above according to their application. In this way, header data and optional item data can be maintained for opportunities, but no schedule lines are used.

Mixed Business Transactions

The business function is displayed and controlled at item level

→ **A sales transaction that combines order, request for quotation, and quotation**

Sales transaction

Header

Sold-to Party: Megastore

Items

		Status
10	X-100	Request for quotation
20	Y-200	Quotation
30	Z-300	Order

- The actual business function or selection takes place at item level in a business transaction.
- It is possible, for example, to combine quotation and order items in a sales transaction. This is controlled by the status of the item.
- For example, you can very quickly and efficiently convert the quotation item originally requested by the customer into an order item in the Interaction Center.

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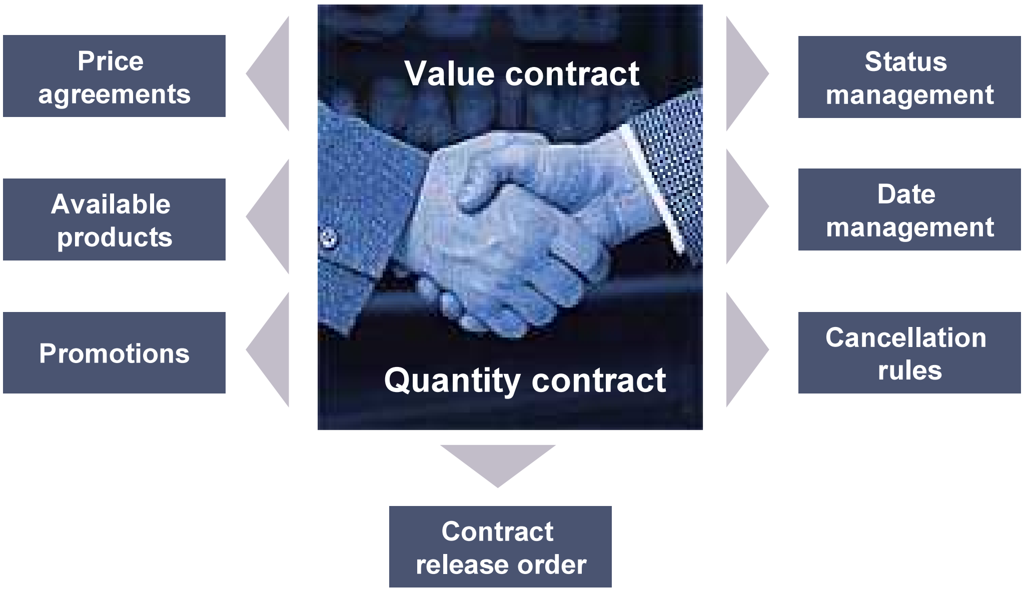
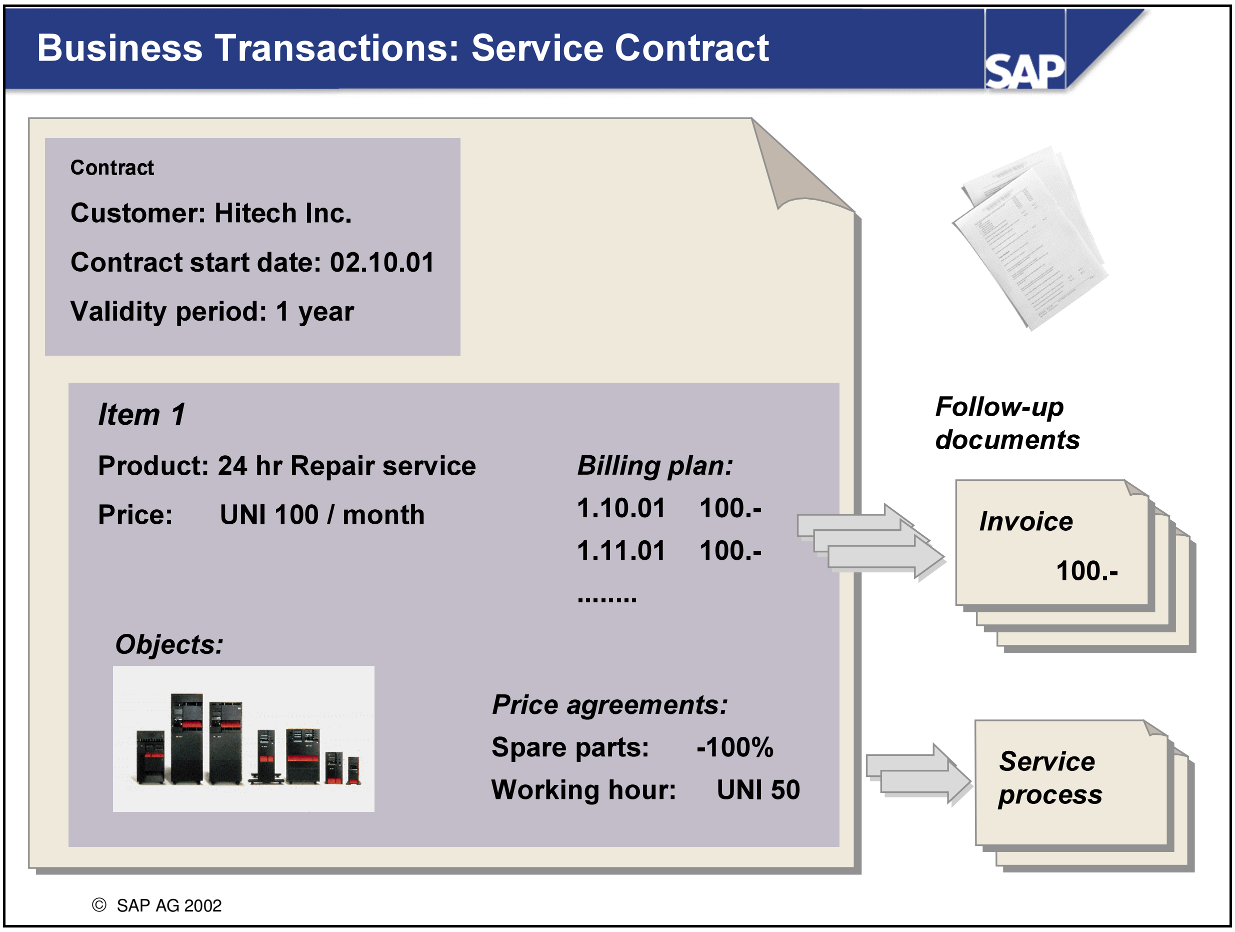
Business Transactions: Contracts

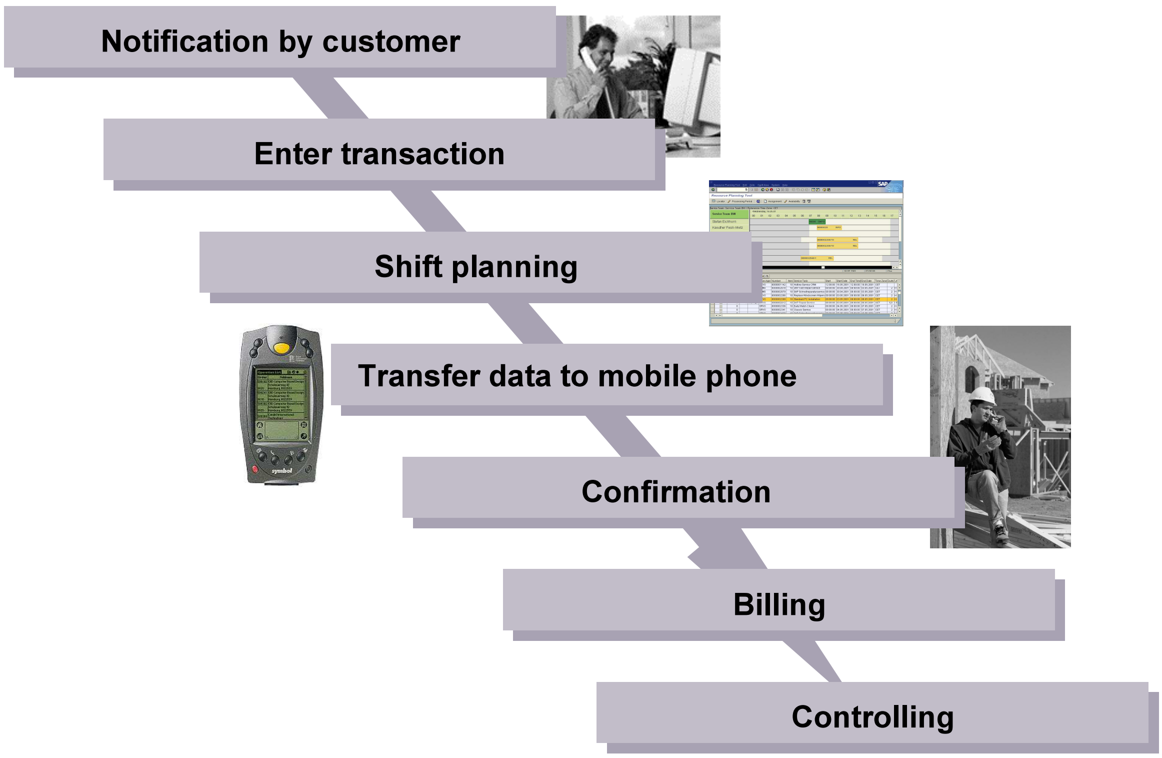


- Contracts are used to increase customer loyalty.
- A contract is an outline agreement that permits the customer to access products or services under specific conditions agreed upon in advance, such as lower prices.
- The following contract types are currently supported in CRM:
  - Sales contracts (quantity, or value contracts)
  - Service contracts
  - Leasing contracts (available for test purposes only)
- Functions such as date management, promotions, terms of payment, and cancellation rules are used within the framework of working with contracts.
- Products in a contract can be called per sales order via CRM Online and Internet Sales.
- A callable product can be defined as an individual callable product, a product selection, or a product category for a contract item.
- Start and end dates, as well as contract terms, can be controlled via data profiles.



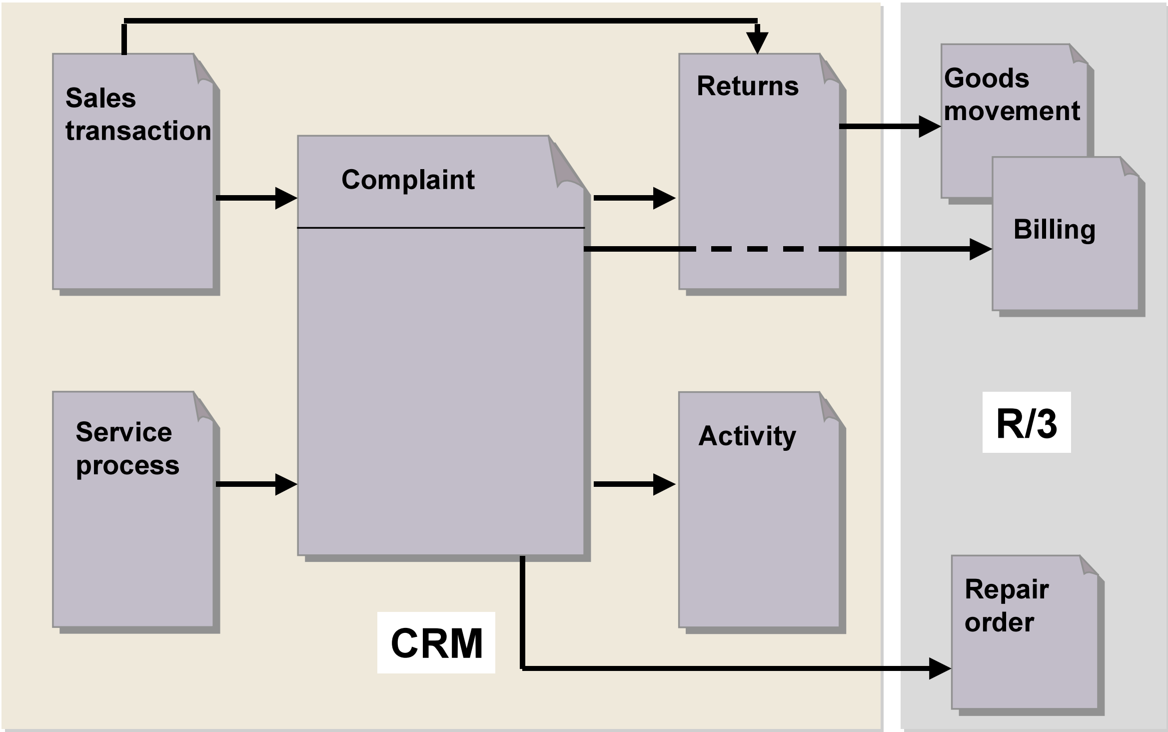
- Long-term customer agreements are made with service contracts. Service contracts ensure that specific services are rendered for the customer in a predefined period of time. For example, in the event of a technical fault in a machine, the customer is assured that a technician will be on site within four hours to repair the defect.
- During the validity period of the service contract, you can use the service contract to:
  - Send out automatic billing for contract charges at regular intervals
  - Determine whether a service request from the customer is covered by the service contract
  - Determine which contractual price agreements are valid for services
  - Determine whether the customer's request for cancellation is valid
  - Trigger follow-up activities before the service contract expires
- In the service contract, assured services are represented by service products that are entered in the contract items. Service product properties are defined in Service Level Agreements (SLA), which are ascertained by various parameters such as reaction time and readiness. If the services agreed upon in the SLA cannot be rendered in time, a predefined escalation process can be started automatically.
- Installations and equipment that the contract items refer to can be assigned by you as installations or installation components in the contract items.

Business Transactions: Service Process



- A service transaction serves to display services in the system. From the business point of view, a service transaction can either have the character of a task, or can serve to enter an inquiry. Service transaction items include service products (services), spare parts, or delivery-relevant sales items.
- Service transactions can be entered in a number of ways:
  - By an employee in CRM
  - By an employee in the Interaction Center
  - By a customer via the Internet
  - By a field service employee using a laptop
- Service employees can be assigned and planned using the resource planning tool. The workforce management core is used to do this. An APO System is required.
- The service employee receives transaction data on his or her mobile device (handheld or laptop) with which he or she can confirm working hours and material consumption. Service confirmations are stored as follow-up documents to the service transactions.
- Billing can take place on a fixed-price basis or according to the amount of work involved.
- Controlling for the services takes place in mySAP Financials.

Business Transactions: Complaints



- Complaints and returns can be entered in CRM for goods or services rejected by the customer as part of complaints processing.
- Complaints processing is integrated with the service and sales transactions. It is possible to store complaint or returns documents as follow-up documents and thereby transfer data from the relevant previous document.
- A variety of follow-up processes can be triggered using actions as part of the complaints process. These can be credit or debit memo request items, or documents such as activities or documents in R/3 (for example, repair contracts).
- A complaint can lead to a return. Only items with the product type **Material** can contain returns. Credit memo items, return items, and replacement delivery items can be created within the return. For credit memo items within a return, a data transfer takes place in R/3 so long as external billing was selected (you can decide whether the credit memo should be generated using CRM Billing or be created in R/3). For substitute delivery items, the goods issue document is created in R/3.
- You have the possibility to create statistics for evaluation purposes by means of integration with the SAP Business Information Warehouse (SAP BW).

Business Transactions in CRM: Unit Objectives

You are now able to:

- List various CRM business transactions
- Describe the structure of business transactions
- Describe the document flow between business transactions

Exercises

Unit: Business Transactions in CRM

Topic: Activities, Opportunities and Sales Transactions

At the conclusion of this exercise, you will be able to:

- Create activities, opportunities and sales orders in CRM
- Analyze the document flow between individual business transactions

You want to call your customer, ##Turner, in a week's time to inform him about your new PC product range. During the call, you find out the customer is possibly interested in buying a large number of units of a particular model. The customer will place an order with you at a later time.

1-1 You want to store the information in the system that you want to speak to your customer, ##Turner, on a specific date to advertise your new PC product range.

1-1-1 So that the locator and work area always appear in one screen during future business transaction processing, you should first convert your personal settings. To do so, in the personal settings for your locator, select the *General* tab, field display type **Min. Loc**.

1-1-2 Create the activity contact and select the following data:

Description:	**Call customer ##Turner**
Category:	**Acquisiton call**
Activity partner:	**##Turner (Select appropriate customer number using F4 Help)**
Priority:	**High**
Reason:	**Sales Promotion**

The contact should be planned for a week from today.
Save your activity and note the business transaction number given by the system.

1-1-3 When can you check, in the activity just created, that this contact appears as an activity in your calendar?

1-2 Imagine it is the date of the appointment planned above. Accordingly you want to phone customer ##Turner to offer him suitable products.

1-2-1 In your Business Workplace, go to your activities and select the contact you created in Exercise 1-1-2.

1-2-2 During your call, you note that customer **##Turner** might possibly be interested in a larger number of **HT-1000** Notebooks. Create an opportunity relating to your activity. Enter the following:

Description:	**Opportunity Customer ##Turner**
Planned completion time:	**The end of the year**

Go to the tab page *Products* and define the quantity **50** for Product **HT-1000**, in which the customer is interested.

Save your opportunity and note the business transaction number given by the system.

____

1-2-3 How can you check which activity the opportunity just created refers to? Carry out this check on the opportunity.

____

1-3 Several days later, your customer, **##Turner,** contacts you to say he would like to order **3** pieces of product **HT-1000**.

1-3-1 Create this Telesales order as a follow-up transaction to your opportunity.

In the *Item selection* screen, select 3 units of product **HT-1000** and add this item to the ordered products.

Save your Telesales order and note the business transaction number given by the system.

____

1-3-2 Go to the order you just created. Which price (gross value) was calculated for the ordered products?

____

1-3-3 How can you see if the Telesales order saved in CRM has already been sent to the OLTP R/3 System? Carry out this check.

____

1-3-4 Look again at the document flow for the whole transaction (starting with your Telesales order). Which two links are obvious?

____

____

From the document flow, go directly to the order replicated in the OLTP R/3 System.

Solutions

Unit: Business Transactions in CRM

Topic: Activities, Opportunities and Sales Transactions

1-1 You want to store the information in the system that you want to speak to your customer, ##Turner, on a specific date to advertise your new PC product range.

1-1-1 So that the locator and work area always appear in one screen during future business transaction processing, you should first convert your personal settings. To do so, in the personal settings for your locator, select the *General* tab, field display type **Min. Loc**.

SAP Menu → Activities → Maintain Activities

Select the *Settings* icon.
Go to the *General* tab page and select in the information block *Locator*, field display type: **Min. Loc**.

To activate the new settings, call the transaction again (***SAP Menu → Activities → Maintain Activities).***

1-1-2 Create the activity contact. Select the following data:

If you have left this transaction, call it up again:

SAP Menu → Activities → Maintain Activities
Icon *Create Business Transaction: Contact → Contact*

Description:	**Call customer ##Turner**
Category:	**Acquisiton call**
Activity partner:	**##Turner (Select customer number using F4 Help tab page: Partner General)**
Priority:	**High**
Reason:	**Sales Promotion**

The contact should be planned for a week from today.
Enter the appropriate dates in the fields ***From*** and ***To*** in the block ***Dates***, as well as a suitable time.

Save your activity and note the business transaction number given by the system.
Select ***Save***. The business transaction number is displayed in the status line.

1-1-3 When can you check, in the activity just created, that this contact appears as an activity in your calendar?

Call up your activity again, if you have already left the transaction.

Go to the ***Partner*** tab page.
Calendar maintenance is activated for the partner function Person responsible.
You should also find yourself entered as *Person responsible* in the calendar (select the tab page *Calendar* in the locator).

1-2 Imagine it is the date of the appointment planned above. Accordingly, you want to phone customer ##Turner to offer him suitable products.

1-2-1 In your Business Workplace, go to your activities and select the contact you created in Exercise 1-1-2.

Menu → Business Workplace:
Inbox → Activities
Call up the appropriate activity by double-clicking on it.

1-2-2 During your call, you note that customer **##Turner** might possibly be interested in a larger number of **HT-1000** Notebooks. Create an opportunity relating to your activity. Enter the following:

From your contact, select the ***Create Follow-up transaction*** icon, and transaction type ***Opportunity***.

Description:	**Opportunity Customer ##Turner**
Planned completion time:	**The end of the year**

Go to the *Products* tab page and the product **HT-1000**, and quantity **50**.

Save your opportunity and note the business transaction number given by the system.

1-2-3 How can you check which activity the opportunity just created refers to? Carry out this check on the opportunity.

Select the ***Document flow*** icon from the opportunity you created. You can analyze the history of this transaction here.

1-3 Several days later, your customer, **##Turner,** contacts you to say he would like to order 3 pieces of product **HT-1000**.

1-3-1 Create this Telesales order as a follow-up transaction to your opportunity.

SAP Menu → Sales → Maintain Opportunities

Go to the ***Search*** tab page and enter the business partner number of ##Turner as sales prospect. Then select ***Start***.

You can now call up the last transaction from the customer history. Alternatively, you can call up your opportunity via ***Open Transaction*** by entering the transaction document number.

Select the ***Follow-up Activities*** icon, transaction type ***Telesales***.

In the *Item selection* screen, select **3** pieces of product **HT-1000** and add this item to the ordered products.

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Mark the item in the *Item selection* screen, change the quantity to the three units wanted, then select ***Copy***.

Save your Telesales order and note the business transaction number given by the system.

1-3-2 Go to the order you just created. Which price (gross value) was calculated for the ordered products?

SAP Menu → Sales → Maintain Sales Orders

Call up the order you just created via ***Open Transaction***, mark your order item, and go to the ***Prices*** tab page.

1-3-3 How can you see if the Telesales order saved in CRM has already been sent to the OLTP R/3 System? Carry out this check.

In your order, go to the ***Status*** tab page to header or item level. There you can see the distribution status is set to **Successfully distributed**.

1-3-4 Look again at the document flow for the whole transaction (starting with your Telesales order). Which two links are obvious?

SAP Menu → Sales → Maintain Sales Transactions

Select ***Document flow.*** You can see the opportunity just created as a preceding document. The order replicated in R/3 is displayed too.

From the document flow, go directly to the order replicated in the OLTP R/3 System.

In the document flow, select the entry **Replicated document** by double-clicking. Go directly to the order replicated in the R/3 System.

CRM Marketing

Contents:

- **Creation of a Marketing Plan**
- **Target Group Selection**
- **Campaign Execution**
- **Marketing Analysis**

CRM Organizational Model: Unit Objectives

At the conclusion of this unit, you will be able to:

- Describe planning, targeting, and analysis functionality in CRM Marketing Planning and Campaign Management
- Create a marketing plan
- Generate a target list of customers
- List different channels of campaign execution

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Course Overview Diagram

Marketing | **Sales** | **Service**

Task

Customer

Relationship

Management

Contact Channel

Interaction Center

Internet

Mobile

Marketing: Business Scenario

- **The head office at IDES, Inc. needs to develop a marketing plan including two campaigns to increase its monitor sales in North America.**

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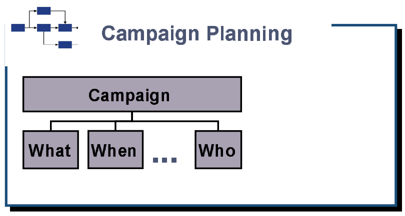
Marketing and Campaign Management

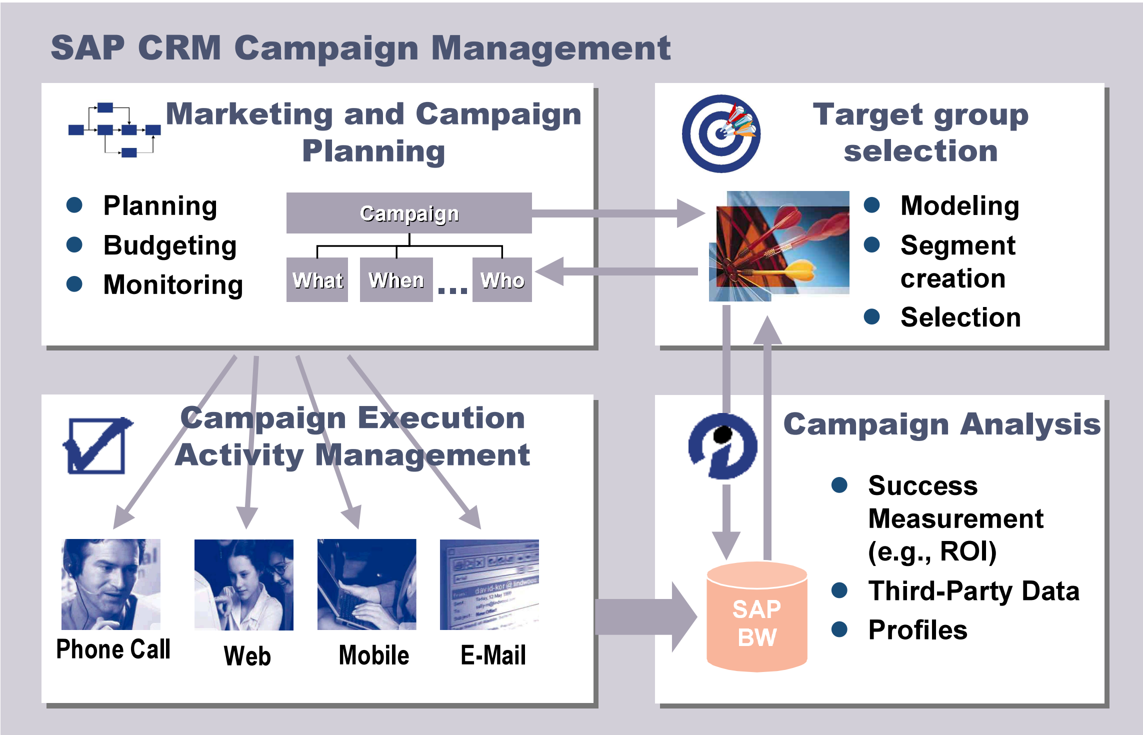
Marketing plan
- Strategic level
- Focused on planning



Campaign
- Operative level
- Focused on doing

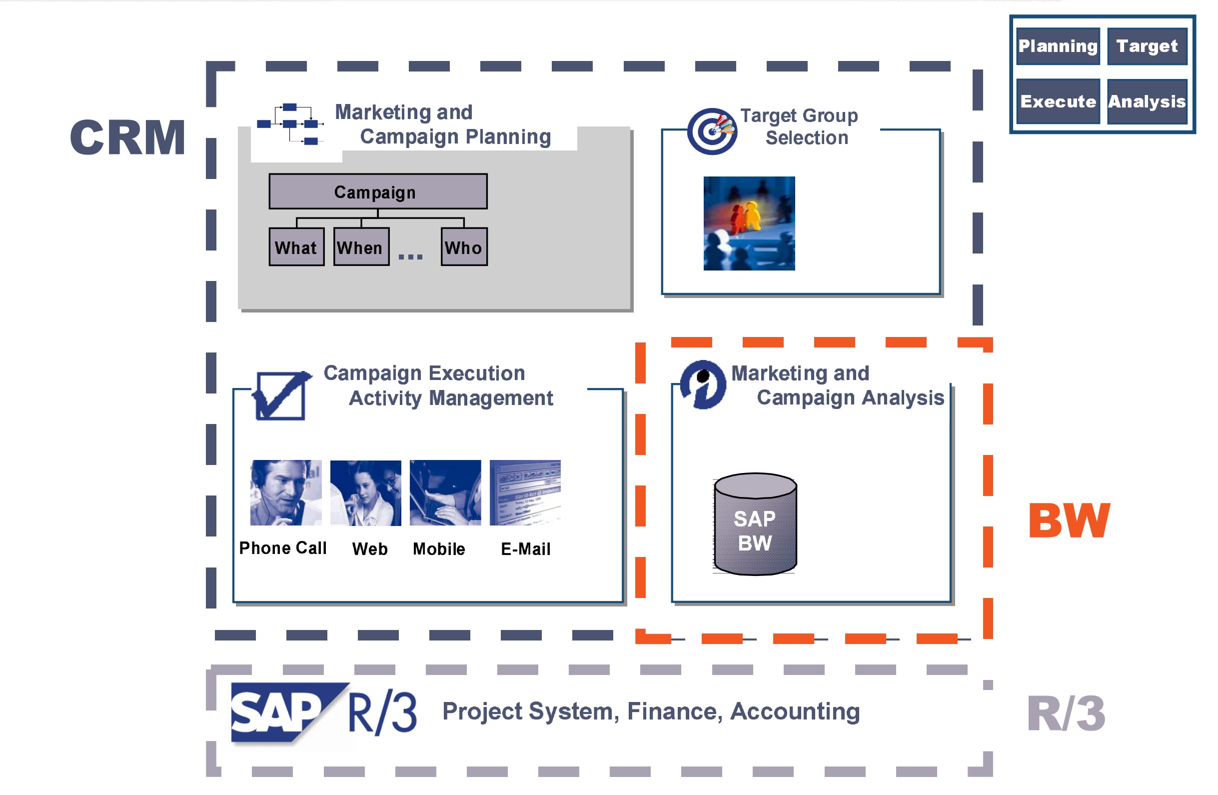
- A marketing plan is used by Marketing Management to determine and execute the marketing policy of your company.
- A marketing plan is set up in agreement with the programs of finance and product and includes sales and cost planning.
- A campaign is an instrument of Marketing Management to determine and execute marketing activities using marketing instruments.
- Campaigns may be assigned to the marketing plans and thereby form the operative structure.
- A campaign defines actions that are carried out, for example, mailing actions, television spots, and telemarketing.
- A campaign also defines target and product groups, persons responsible, and the budget.

Campaign Management in CRM



- SAP CRM Campaign Management consists of four areas:
  1. Marketing and campaign planning - includes planning, budgeting, and monitoring of the campaign.
  2. Target group selection - includes modeling, profiling, and selecting.
  3. Campaign execution/ activity management: Integration of activities. You can trace the activities concerned with the campaign to gauge its success.
  4. Campaign analysis - uses Business Information Warehouse
- CRM Marketing Management encompasses functionality for planning, targeting, executing, and analyzing marketing plans and campaigns.
- The main points to remember during this unit are: plan, target, execute, and analyze.

CRM Marketing Integrated System Landscape



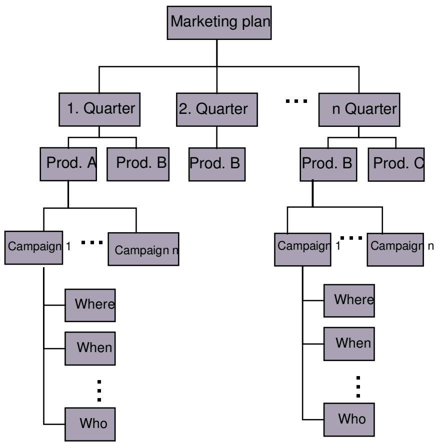
- The Marketing Planner is the central tool in CRM for editing marketing plans and campaigns. The planner is highly integrated with other functions, not only in CRM, but also with SAP R/3, SAP BW, SAP SEM, and external applications like MS Project.
- Integration with the R/3 System: You can create a connection to the R/3 system by assigning a marketing plan complete with marketing elements, campaigns and campaign elements to an existing work breakdown structure (WBS) element, or to a new WBS element in R/3.
- In Marketing and Campaign Planning there are a number of predefined key figures that can be divided into three major blocks:

  1. Marketing monitoring key figures (number of activities, number of responses, etc....)

  2. Marketing performance key figures (response rate, success rate, etc....)

  3. Marketing monetary key figures (marketing-induced revenues, costs of marketing element, etc....)
- All key figures are transferred as master data to the SAP BW Key Figure Info Object and can be used by the InfoCubes and queries for carrying out specific analyses.

Marketing Planning in CRM



- Marketing planning structure (e.g., long-term planning, campaign hierarchy, activities)
- Scheduling
- Milestones
- Resource allocation
- Budget and revenue planning
- Monitoring

- Marketing plans can be structured in any fashion required by the organization (e.g., product, chronological, customer, geographical, etc.)
- Marketing plans can be structured to any level of detail required by the organization, and zero-to-*n* campaigns can be assigned to any given marketing plan.
- Campaigns can be planned either as a part of a marketing plan or as a stand-alone campaign.
- The main difference between a campaign and a marketing plan is that a campaign is the operative instrument for managing interactions with customers.

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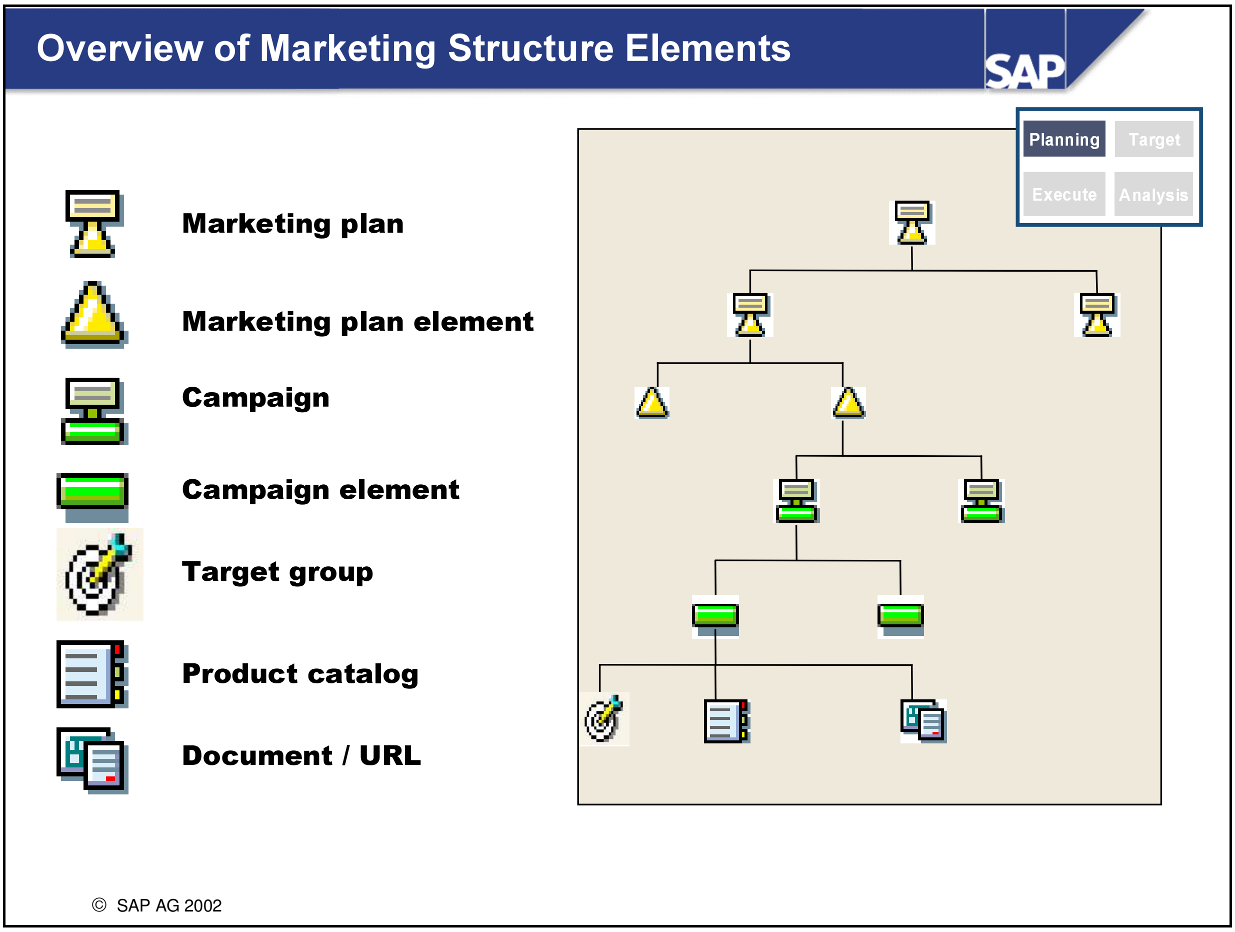
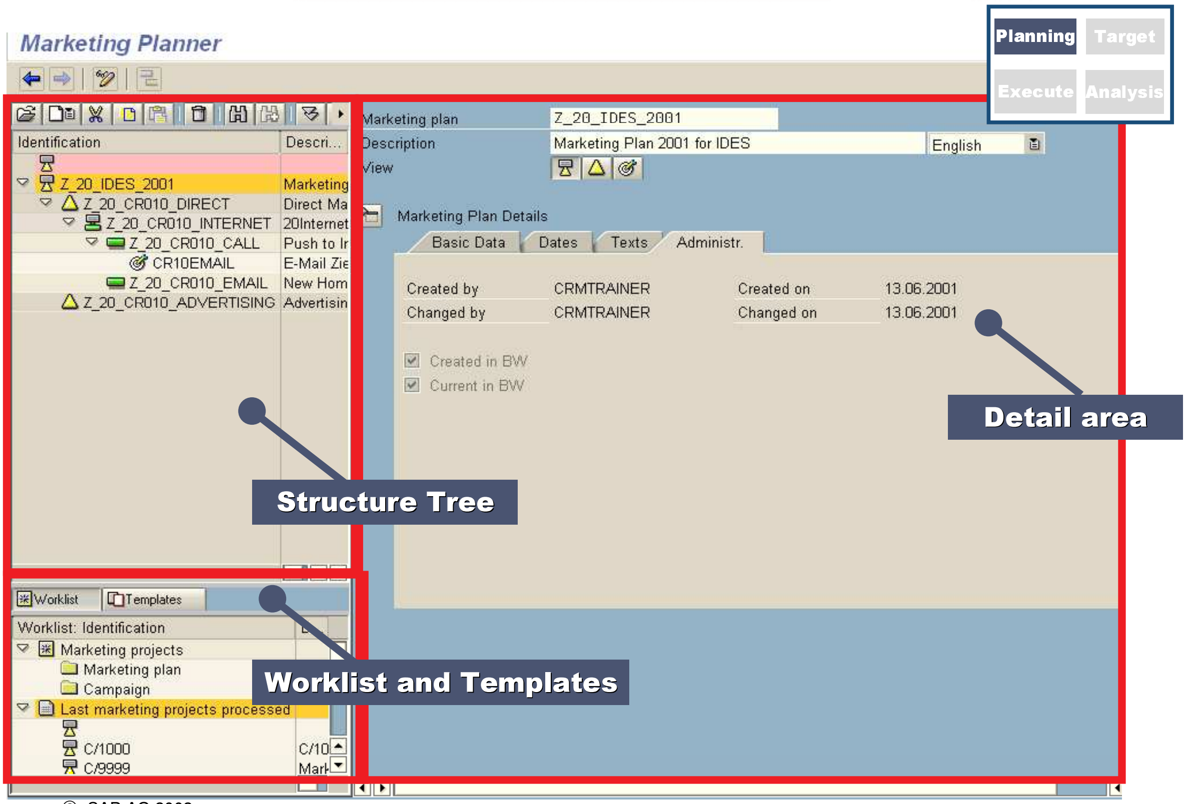


- Using SAP CRM Marketing and Campaign Planning, marketing departments can plan their activities in a project plan structure (analogous to work break down structures in SAP R/3). The marketing planning structure and the way in which the related marketing elements are ordered is completely flexible and can be created according to organizational needs.
- Underneath the marketing plan, other marketing plans or marketing plan elements can be assigned. You can use any number of marketing plan elements to structure a marketing plan.
- The marketing plan elements are then followed by campaigns and campaign elements.
- The bottom of the hierarchical marketing structure may consists of target groups, product catalogs, and documents/ URLs.
- Marketing and campaign plans (not the elements) serve as logical units by which authorization can be set.

Structure of the Marketing Planner



- The structure tree shows the selected marketing projects (marketing plan and/or campaigns) and their hierarchical dependencies. You can manually change the dependencies and assignments of the individual marketing elements (using drag & drop). In addition, you can create or delete marketing elements here.
- In the worklist, you store marketing projects that are often required by specific users (marketing plans and/or campaigns). In addition to this, a list of the last five marketing projects that you have processed are always displayed in the worklist. They can be transferred from the worklist and templates area to the structure tree area by drag & drop.
- The templates are used during editing as a proposal pool from which you can include other operational marketing projects or campaigns in your marketing project. On the initial screen in the Marketing Planner, the worklist is displayed first. After opening your marketing project data, the system automatically switches to the *Templates* screen area.
- The work area shows you the detail view for the selected object in the structure tree. Depending on the selected object, you can see in the work area the marketing elements (icons under the description field) which can be assigned in the level underneath.
- In each tab of the work area, additional information about the selected object in the structure tree can be stored. The field values can be chosen by selecting a value from the drop-down list. You can set up user-specific field values.

Target Group Determination

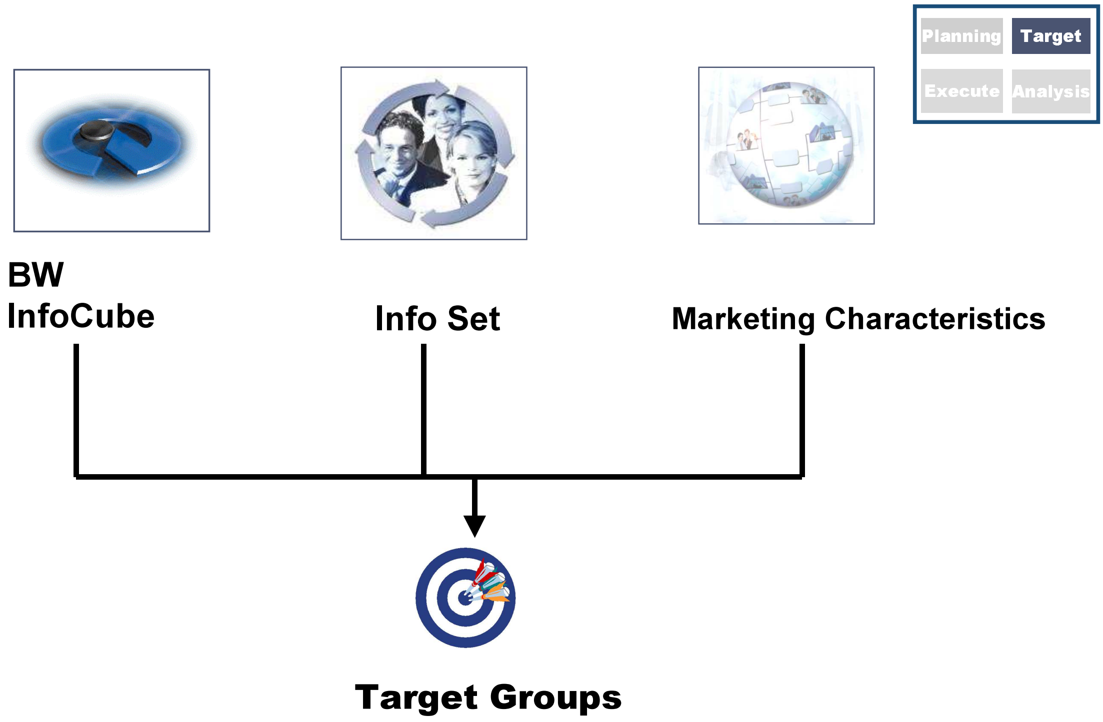
Planning	Target
Execute	Analysis

Target group selection

- Modeling
- Segment creation
- Selection

The Business Partners in a Target Group of a Campaign are based on the Business Partner Profiles.

Data Source for Target Group Creation



- Three data sources are available for target group selection as of Release 3.0:
  - BWs reports (Business Warehouse Info-Cube)
  - InfoSet consisting of own ABAP/4 queries
  - Marketing characteristics from the characteristics groups in the business partner master data
- By using InfoCubes and reports, you can select the business partners for a target group in SAP BW from master data, profiles, or transaction data
- By using the Info Set from your own ABAP/4 queries, which evaluate the general data from the business partner master record, you can select target groups according to address, postal code, etc.
- You can maintain your own marketing characteristics directly in the business partner master record. Characteristics are grouped together and created in characteristic groups. After being assigned to a business partner, you can maintain these accordingly and use them for target group selection.

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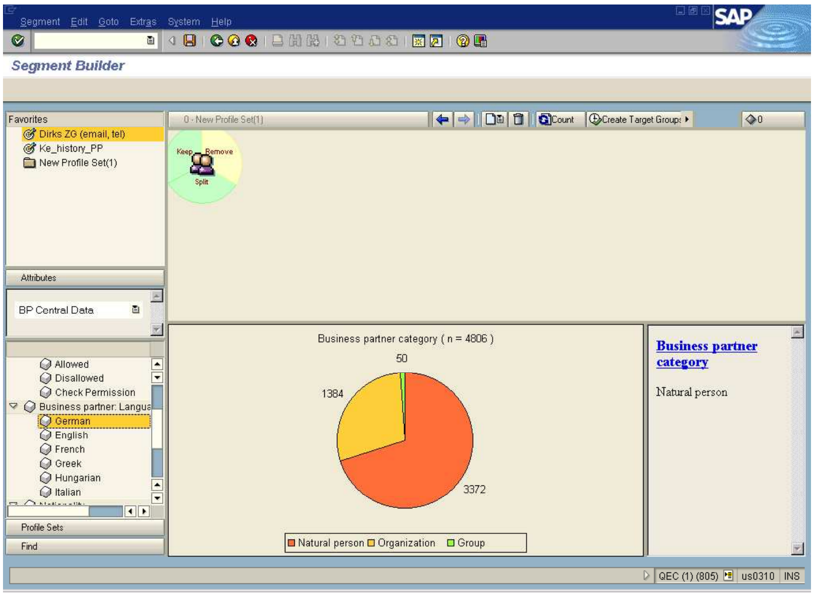
Business Partner Segmentation

Profile:
Contains specific values for a particular customer

Beispiel: Geschäftspartner
GP Kategorie: Person
GP Sprache: Deutsch
Messebesucher: JA

Target group
German-speaking trade fair visitors

Determined by the Segment Builder

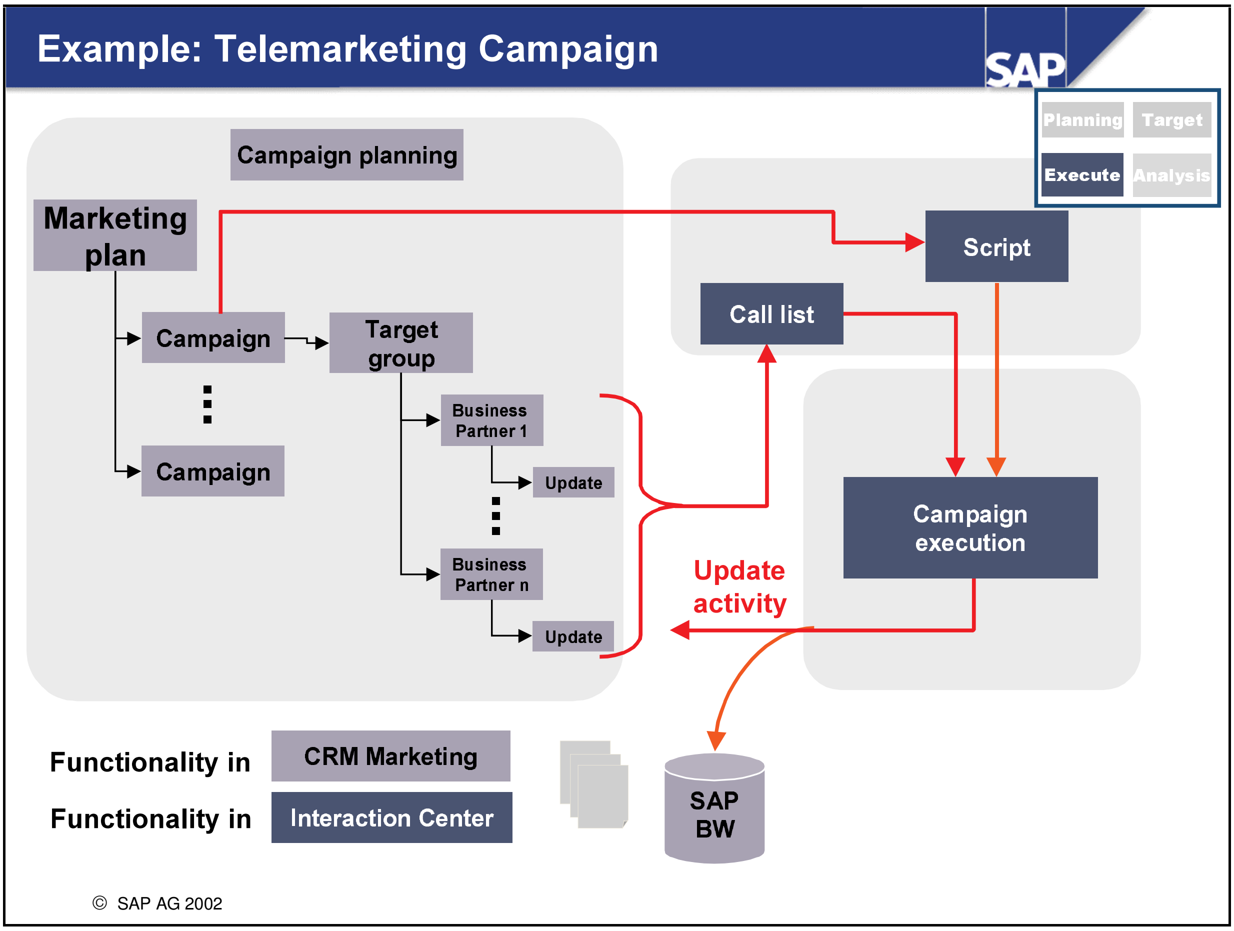


- Business Partner segmentation offers a wide spectrum of functions that enable you to group your customer master in various groups by marketing activity. By segmenting your markets, you can offer more individual and therefore more attractive, product ranges and service quotations.
- The Segment Builder offers you a user-friendly tool for modeling target groups.
- Business partner segmentation process flow:
  - Create profiles. These are a list of characteristics and characteristic values that describe a business partner on the basis of source data for target group selection (BW InfoCubes, Info Sets, or characteristic groups)
  - To be able to model the data in the Segment Builder, you must assign the respective selection data sources and selection attribute lists
  - You can combine various characteristics and model target groups in the Segment Builder

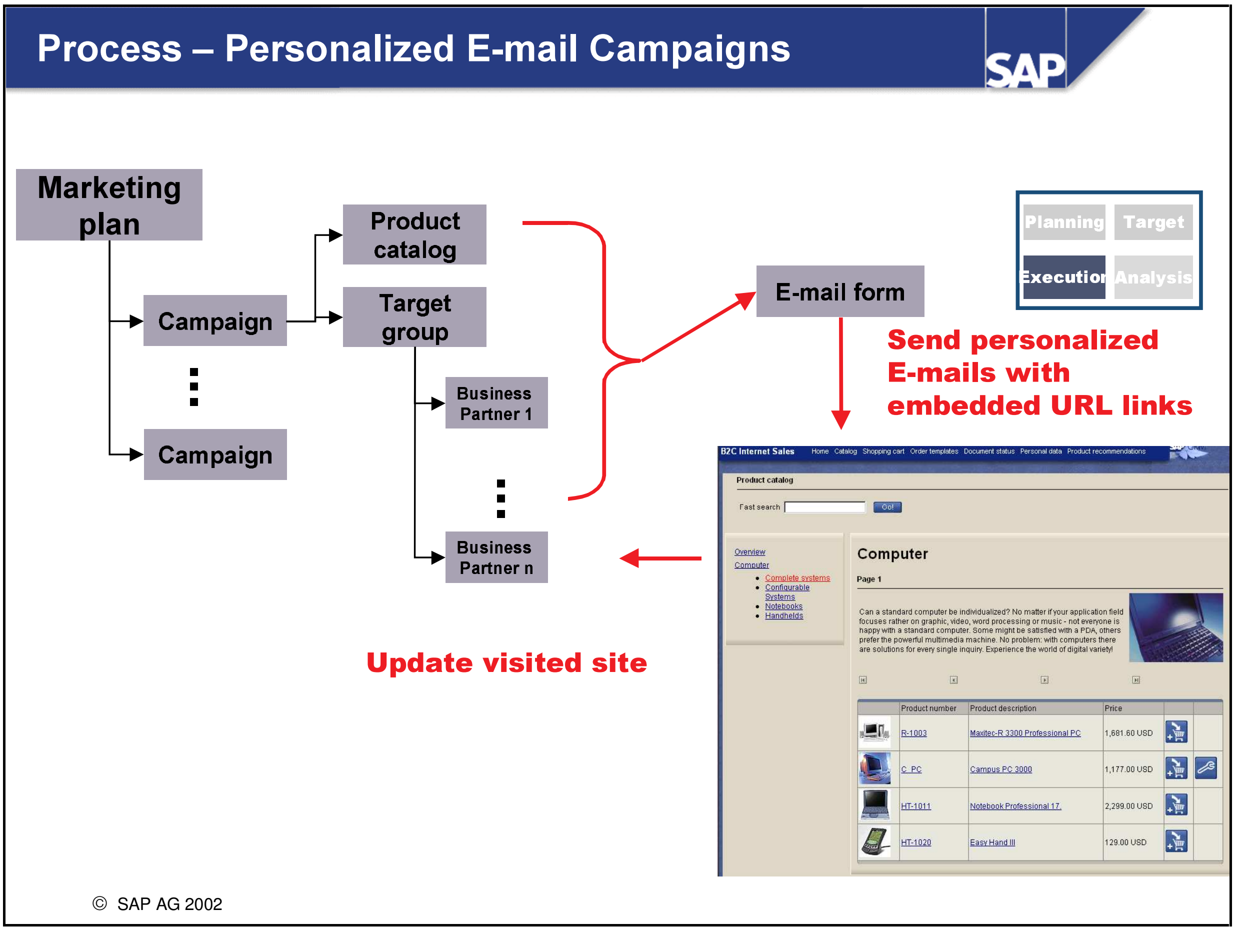
Campaign Execution

- **Executing campaigns across all customer touch points**
  - **Web**
  - **Phone call**
  - **Mobile/ face-to-face**
  - **E-Mail**
  - **Direct mail**
  - **SMS**
  - **...**
- **Activity generation from target group**
- **Campaign-specific conditions**
- **Multichannel/ multiwave (multiple channels/ waves)**

- Activity management is the basis for tracking interactions with customers in CRM.
- Activities are generated per business partner for a given tele-campaign. These activities can be updated during the execution of the campaign (an update could be, for example: Status: open; Reason: customer did not answer phone). The activities for a campaign can be monitored to track the progress of the campaign.



- This slide details an example of the telemarketing campaign process.
- A campaign (this example is related to a marketing plan) is created. Linked to this campaign is a target group (a finite list of business partners selected for the campaign) and a script. A call list is generated from the target group. The call list includes the business partner information as well as relevant information required for the call center.
- Using the script and the call list, the agent calls the customers represented in the call list. When a call is completed, the agent updates the activity with the results of the call. This information is also written to SAP BW for reporting / monitoring purposes.



Process:

- The user sets up an e-mail marketing campaign, with a related target group.
- The e-mail form is customized to match desired marketing message.
- E-Mails with parametrized (checked by the user - for tracking purposes) URL links are sent to all campaign participants.
- The receiver clicks on a URL link and is guided to a personalized Web page (i.e., Internet Sales). Activity related to the business partners is either created or updated (e.g., user visited Web page).

Flexible and Personalized E-Mail Form

Planning Target
Execute Analysis

To: Chris Fastabend
From: info@sap.com
Subject: Special Offer!

Dear Chris,
We would like to draw your attention to the new offers posted on our Web site. Go on, take a look...

Computer Bestseller
- PC: *Campus PC 3000*
- Notebook: *HT-1011*

@ www.PC4You.com/bestsellers

Special offers for your Dog
- Dog Bed "Cosy"

@ www.PC4You.com/bestsellers

Substitution of variables
(e.g., from BP master data)

Named Link
w/ parameterization

Named Link
w/ parameterization

Personalized text blocks based on Profiles

Conditions :

If Target group = Yuppies or age > "25" and gender = "male" then show this text block

Conditions :

If Target group = DOG_LOVER then show this text block

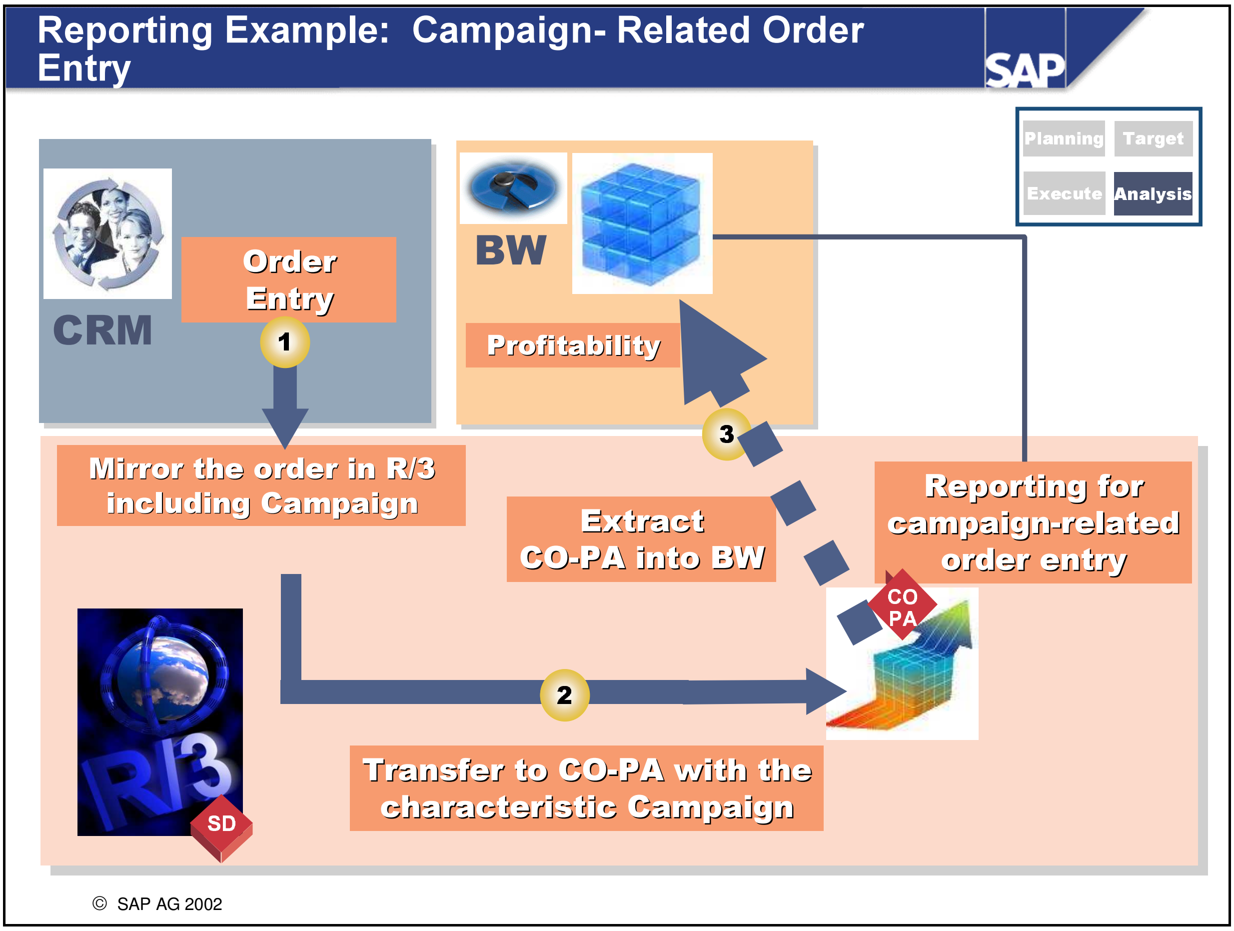
Analysis Through the Campaign Phases

Planning | Target
Execute | Analysis

- Planning/ Targeting
  - Marketing Analysis
    - Market Potential Analysis
    - Portfolio Analysis
    - Competitor Analysis
    - Sales Analysis
    - Target Group Modeling
    - Planned Costs/ Revenues
    - ...
- Execution
  - Monitoring
    - Key Performance Indicators
    - Actual Costs / Revenues
    - Alerts / Thresholds
    - ...
- Analysis
  - Success Measurement
    - Lead generation
    - Response rate
    - Cost benefit
    - Channel efficiency
    - ...

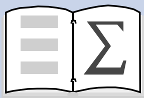
Analysis - Key to all Campaign Phases

- Analysis takes place not only in the control of a campaign, but during the entire process.
- During the planning and targeting phases, marketing opportunities are sought based on existing data on customers and products, as well as through the use of third-party data that can be stored in SAP BW.
- During the execution of campaigns, monitoring becomes a key form of analysis. By monitoring the progress of campaigns during the execution, campaign managers can determine how well a campaign is running and make adjustments to improve performance.
- Success measurement of campaigns allows organizations to determine what types of campaigns work best for certain customers, thereby enabling the organization to improve its performance.



- When transferring a sales order that you created in CRM to R/3, the value for the marketing element characteristic is automatically entered in the profitability segment. In this way, the revenues achieved by a campaign display in Profitability Analysis (CO-PA).
- The actual costs are posted directly to WBS-Elements and transferred to SAP BW by extracting data from the Project System (PS). Automatic derivation of revenues for each campaign is not possible with this method.
- The actual costs are not displayed in SAP BW until settlement to Profitability Analysis has been carried out and the transfer to SAP BW has taken place.

Marketing: Unit Summary



You are now able to:

- Describe planning, targeting, and analysis functionality in CRM Marketing Planning and Campaign Management
- Create a marketing plan
- Generate a target list of customers
- List different channels of campaign execution

Exercises

Unit: Marketing

Theme: Creating marketing plans and campaigns

At the conclusion of this exercise, you will be able to:

- Create a marketing plan
- Create two campaigns

As the marketing manager at PC4You, you have to set up a marketing plan for this year with different marketing elements and several campaigns for different target groups.

1-1 Create a marketing plan for the year that will contain several campaigns for different target groups.

1-1-1 Create the marketing plan **Z_##_CR010** with the description **Marketing Plan Group ##**. (## being your group number).

Maintain Marketing Plan Details.

Basic Data tab page.

Priority:	High
Person Respons.	**CRM-##**

Dates Block:

Start:	Today
End:	**This day next year**

Save your data

1-2 Add two marketing campaigns to your marketing plan. Your marketing plan incorporates an Internet campaign and a telephone campaign.

1-2-1 Create the campaign **Z_##_CR010_INTERNET** description: **Group ##Internet** in your marketing plan **Z_##_CR010**.

Basic Data tab page.

Campaign Type: **Customer Retention**

Priority: High

Person Respons. **CRM-##**

Dates Block:

Start: **Today**

***End*:** **In two months' time**

Channels tab page:

Communication Medium: **e-mail**

Form for e-Mail: **Z_CR010_MAIL**

e-mail Address: *e-mail address*: **NELSON**
(Chris Nelson, your Campaign Manager should appear as the e-mail sender)

Script: no script; this is relevant to telemarketing campaigns only

Save your data

1-2-2 Create the second campaign **Z_##_CR010_CALL,** description: **Group ##Telephone,** in your marketing plan **Z_##_CR010**.

Basic Data tab page.

Campaign Type: **Customer Retention**

Priority: High

Person Respons. **CRM-##**

Dates Block:

Start: **Today**

***End*:** **In one month's time**

Channels tab page:

Communication Medium: **Telephone**

Script **Call center EN**

Save your data

Exercises

Unit: Marketing

Theme: Assigning target groups to the campaign and executing the campaign

At the conclusion of this exercise, you will be able to:

- Assign a target group to a marketing plan and campaign
- Release and execute the campaign, thereby generating a call list in the Interaction Center

A certain target group of your campaign should be addressed via phone. Therefore, as the Contact Center Manager, you have the task of generating a call list for the specific target group.

2-1 As a Marketing Manager, you want to create a call list for your campaign, **Z_##_CR010_CALL,** via the Marketing Planner.

2-1-1 Assign the target group **CR010 Phone** to campaign **Z_##_CR010_CALL** in your marketing plan **Z_##_CR010**.

Call up campaign **Z_##_CR010_CALL** by double-clicking on it.

Select the ***Assignment Overview*** button.

Assign the target group **CR010 Phone**.

2-1-2 Before you create the call list you have to release your marketing plan, **Z_##_CR010,** and campaign, **Z_##_CR010_CALL**.

Menu path ***Edit*** → ***Release***

2-1-3 Now you want to transfer the target group to the Interaction Center. Create a call list based on your target group data and release the target group data as a job to the Interaction Center. You must select the campaign Z_##_CR010_CALL on the left-hand side and via the *Assignment Overview* button, call up target group CR010 Phone again on the right-hand side and select it. Follow *Extras* → *Target group to channe*

2-1-4 A Job Wizard window appears and asks you when the job should be done. You want the system to finish the job **immediately** with **high priority**.

2-2 In the next step, you would like to check whether the call list you created was successfully transferred to the Interaction Center.

You can reach the Interaction Center via:

SAP Menu → Customer Interaction Center → Administration → Call Lists → Assign Call List

Your call list from campaign **Z_##_CR010_CALL** should appear in the call list management. You will find this in the central screen area under *Call list management*.

To initiate processing of the call list in the Interaction Center, you could assign a contact center agent or agent group to the call list.

Internal Use SAP Partner Only

Solutions

Unit: Marketing

Theme: Creating marketing plans and campaigns

1-1 Create a marketing plan for the year that will contain several campaigns for different target groups.

SAP Menu → Marketing → Marketing Planning and Campaign Management → Marketing Planner

1-1-1 Create the marketing plan **Z_##_CR010** with the description **Marketing Plan Group ##**. (## being your group number).

Select *Create* (or ***Marketing project→ New → Marketing Plan).*** Enter the relevant information.

Basic Data tab page.

Priority:	High
Person Respons.	**CRM-##**

Dates Block:

Start:	Today
End:	**This day next year**

Save your data

1-2 Add two marketing campaigns to your marketing plan. Your marketing plan incorporates an Internet campaign and a telephone campaign.

1-2-1 Create the campaign **Z_##_CR010_INTERNET** description: **Group ##Internet** in your marketing plan **Z_##_CR010**.

Place the cursor on the marketing plan you created, *right* click, and select ***Create → Campaign.***
Enter the following data

Internal Use SAP Partner Only

Basic Data tab page.

Campaign Type:	**Customer Retention**
Priority:	High
Person Respons.	CRM-##

Dates Block:

Start:	**Today**
End:	**In two months' time**

Channels tab page:

Communication Medium: **e-mail**

Form for e-Mail:	**Z_CR010_MAIL**
e-mail Address:	*e-mail address*: **NELSON**

(Chris Nelson, your Campaign Manager should appear as the e-mail sender)

***Script*: no script; this is relevant to telemarketing campaigns only**

Save your data

1-2-2 Create the second campaign **Z_##_CR010_CALL,** description: **Group ##Telephone,** in your marketing plan, **Z_##_CR010**.

Place the cursor on the marketing plan you created, *right* click, and select ***Create → Campaign.***
Enter the following data
Basic Data tab page.

Campaign Type:	**Customer Retention**
Priority:	High
Person Respons.	**CRM-##**

Dates Block:

Start:	**Today**
End:	**In one month's time**

Channels tab page:

Communication Medium:	**Telephone**
Script	**Call center EN**

Save your data

Lösungen

Unit: Marketing

Theme: Assigning target groups to the campaign and executing the campaign

2-1 As a Marketing Manager, you want to create a call list for your campaign, **Z_##_CR010_CALL,** via the Marketing Planner.

SAP Menu → Marketing → Marketing Planning and Campaign Management → Marketing Planner
You can call up your marketing plan again via ***Worklist → Description → Last marketing projects processed***

2-1-1 Assign the target group **CR010 Phone** to campaign **Z_##_CR010_CALL** in your marketing plan **Z_##_CR010**.

Call up campaign **Z_##_CR010_CALL** by double-clicking on it.

Select the ***Assignment Overview*** button.

Assign the target group **CR010 Phone**.

Select the target group **CR010 Ph*** in the ***Description*** field using F4 Help and the ***Start search*** button. Select the target group and confirm with *Enter*.

Save your data

2-1-2 Before you create the call list, you have to release your marketing plan, **Z_##_CR010,** and campaign element **Z_##_CR010_CALL**.

Select your marketing plan, **Z_##_CR010,** and choose ***Edit → Release***. Release your campaign **Z_##_CR010_CALL** in the same way.

The system status on the ***Status*** tab page will change to **Released**.

2-1-3 Now you want to transfer the target group to the Interaction Center. Create a call list based on your target group data and release the target group data as a job to the Interaction Center. You must select the campaign element **Z_##_CR010_CALL** on the left-hand side and, via the *Assignment Overview* button, call up target group **CR010 Phone** again on the right-hand side and select it. Follow ***Extras → Target group to channel***

Select the target group **CR10 Phone,** which is assigned to the campaign element **Z_##_CR010_CALL,** and choose ***Extras → Target group to channels*** (if asked to save data, choose **Yes**).

2-1-4 A Job Wizard window appears and asks you when the job should be done. You want the system to finish the job **immediately** with **high priority**.

On the screen ***Job Wizard: Transfer campaign / target group for subsequent processing,*** choose :
Job class: **A – Priority high**
Start Date: **Immediate**
and select the *Schedule job* button..

2-2 In the next step, you would like to check whether the call list you created was successfully transferred to the Interaction Center.

You can reach the Interaction Center via:

SAP Menu → Customer Interaction Center → Administration → Call Lists → Assign Call List

Your call list from campaign **Z_##_CR010_CALL** should appear in the call list management. You will find this in the central screen area under *Call list management*.

To initiate processing of the call list in the Interaction Center, you could assign a contact center agent or agent group to the call list.

CRM Internet

Contents:

- Selling over the Internet
- Internet Sales Integration
- Features of Internet Sales
- Internet Sales Processes
- Internet Customer Self-Service

Internet Sales: Unit Objectives

At the conclusion of this unit, you will be able to:

- Describe the differences between the R/3 Online Store and SAP Internet Sales
- Discuss the interaction between various systems
- Discuss the features of Internet Sales
- Create and display a customer order using the Internet
- Display the Internet order in the R/3 OLTP System

Course Overview Diagram

Marketing | Sales | Service

Task

Customer

Relationship

Management

Contact Channel

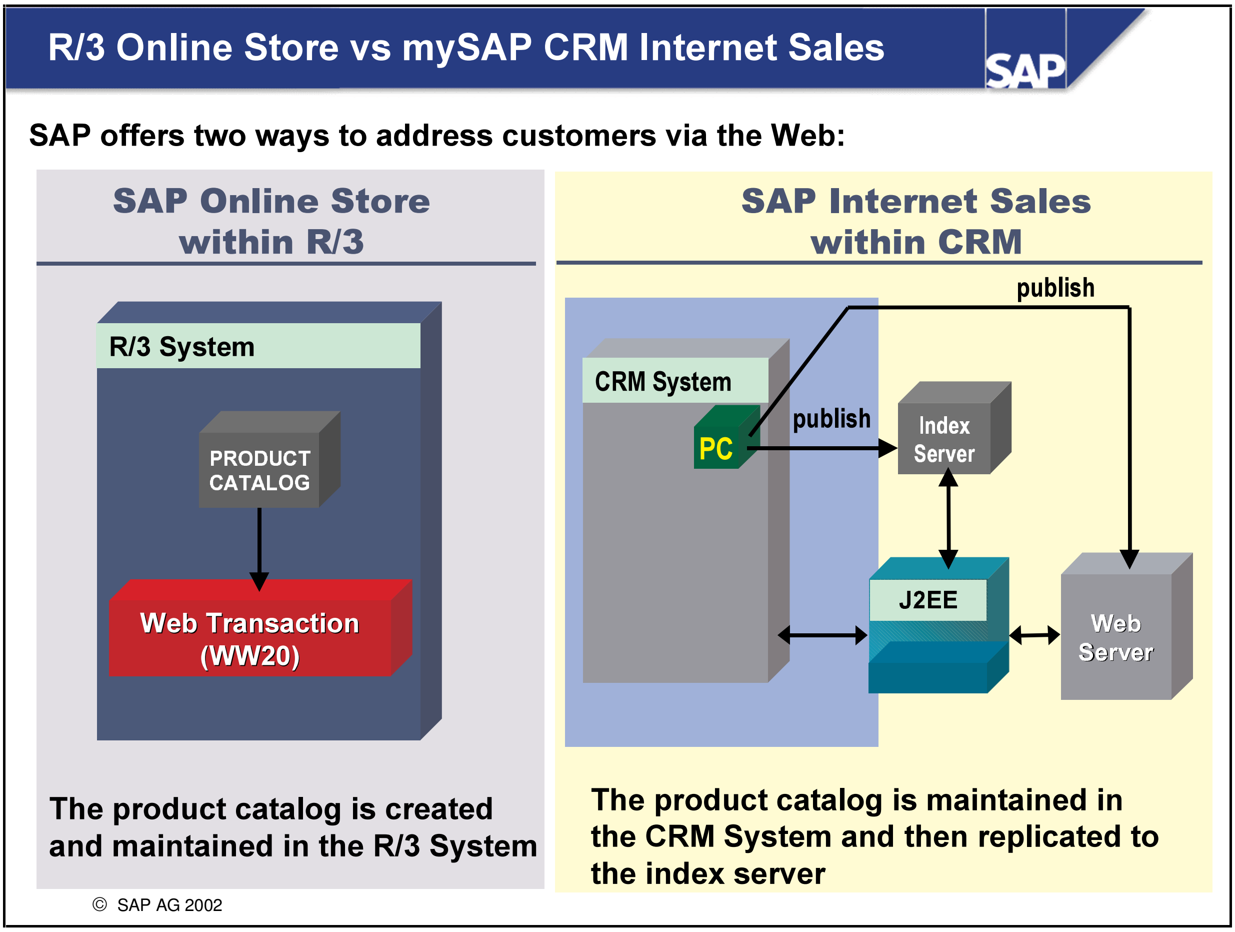
Interaction Center

Internet

Mobile

Internet Sales: Business Scenario

- IDES, Inc. is implementing an Internet solution for its customers and resellers
- You need to become familiar with the various types of interactions associated with Internet sales
- Your customer logs onto the IDES Web site and orders a product. Afterwards, you want to be able to view the information created by the online user



■ SAP Online Store is an R/3-based System and has been delivered with every SAP R/3 since 3.1H.

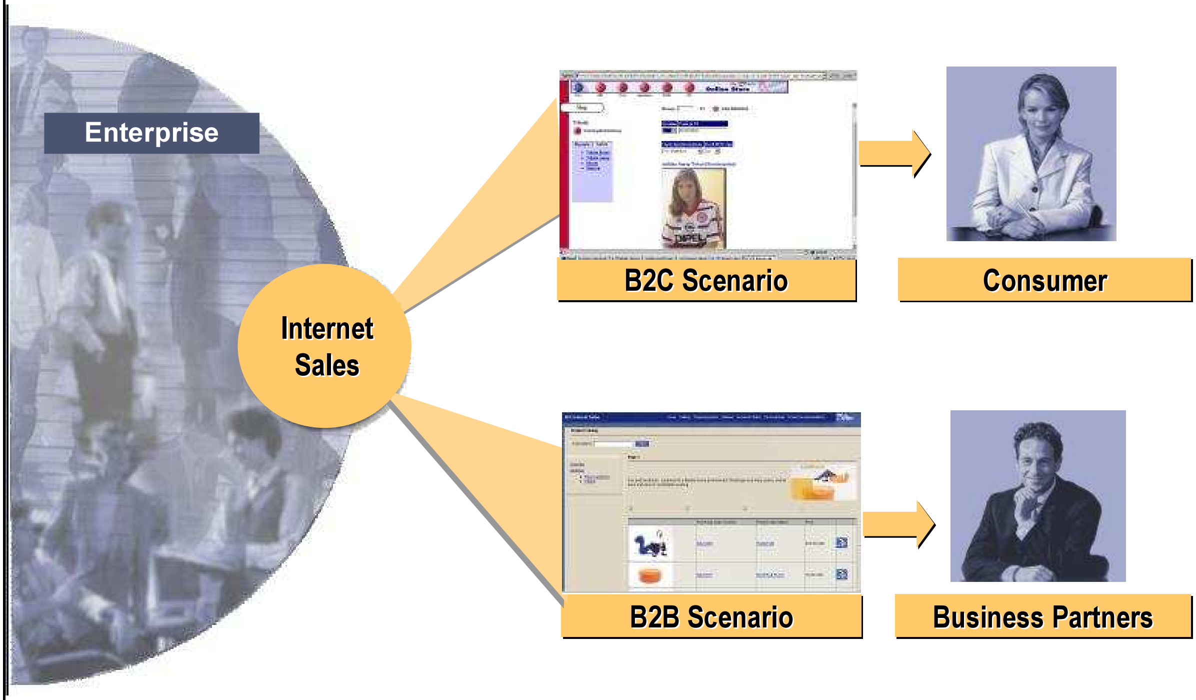
- Central point of data maintenance (**all data maintained in SAP R/3)**
- Easy-to-change store templates included
- Product catalog in the SAP Online Store must be maintained and saved in SAP R/3. A new user is created in R/3 for every Internet user who visits the Web shop and navigates through the product catalog.

■ SAP Internet Sales is CRM-based and is delivered with every CRM System.

- Accesses data processes and functionality of the new CRM System
- Interaction methods can be freely defined and there are no limitations to visual design
- Browsing, pricing, and search processes do not run in the CRM back-end system (**all non-business relevant processing occurs in the Web)**

- An important advantage of SAP Internet Sales is that it pulls transactions such as searching, browsing, or opening multimedia files from the back office to the new CRM System. This avoids overloading the back office and prevents bottlenecks.

Selling over the Internet



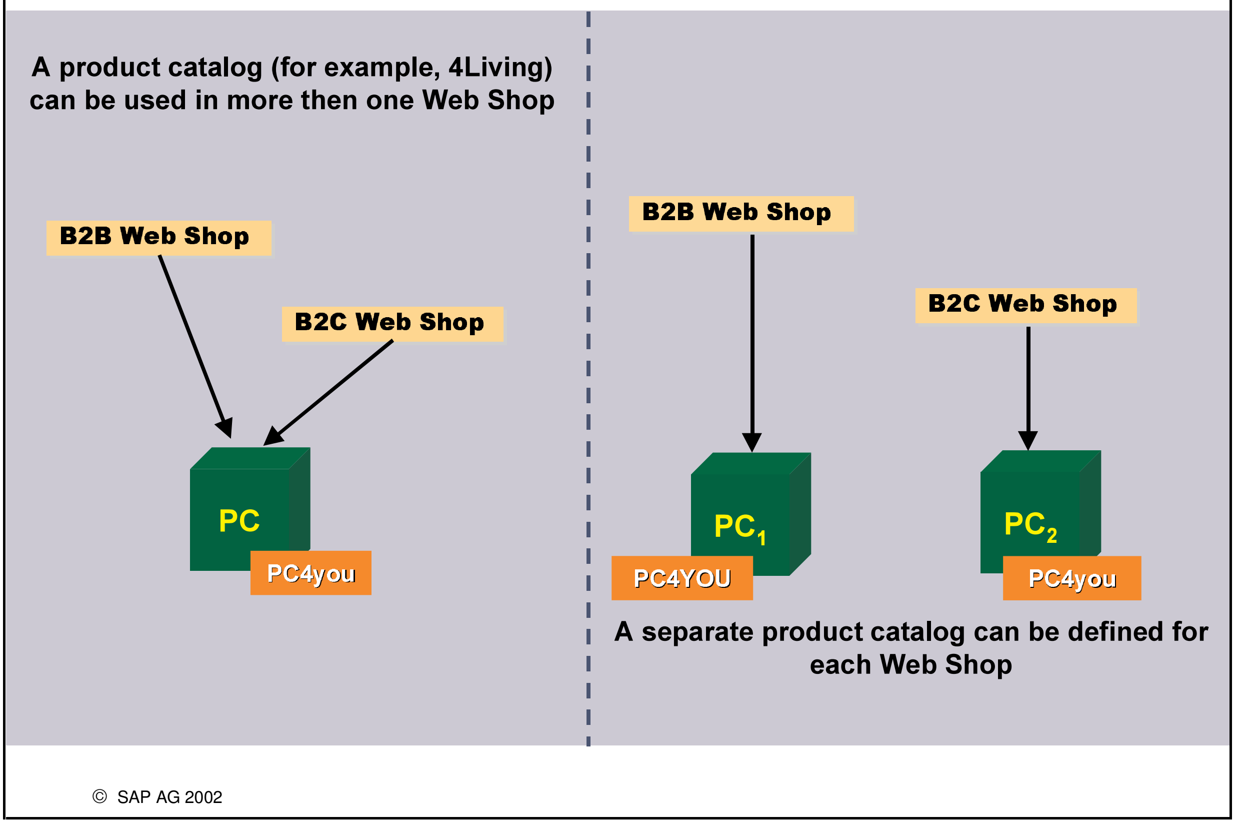
- Depending on the Internet Sales scenario you are using, you have two ways to address Internet customers:

  1. Business-to-Customer scenario (B2C)
     - Focus on anonymous market
     - Focus on the Internet user who may browse in the product catalog and who may visit the Web shop
     - Customer may not yet be known to the enterprise
     - Customer is already a registered customer

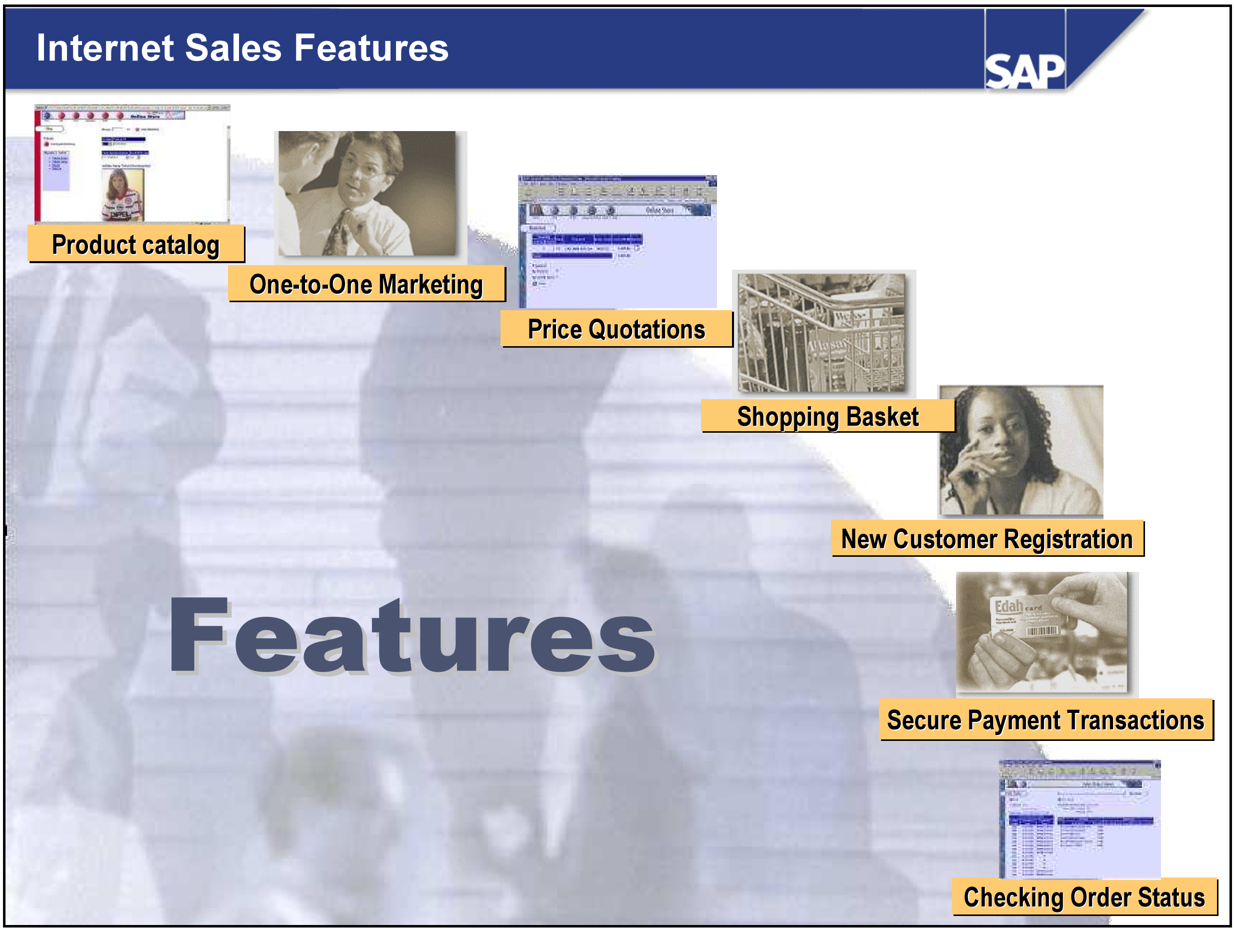
  2. Business-to-Business scenario (B2B)
     - Focus on the business market
     - The customer is known to the enterprise
     - You make special offers and product catalog views for your B2B customers.

Internal Use SAP Partner Only

Using Product Catalogs



- You can define your own views for your B2B customers.
- The view can be copied from an existing Web shop or you can create a new product catalog for each Web shop.



- Product catalog: Enables you to offer your products in the Internet using various media; at the same time, it can also be used as a search tool by customers
- One-to-one marketing: Enables you to personalize product ranges, to create profiles when defining target groups, and to address your customers specifically by analyzing purchasing trends using CRM Marketing
- Price quotations: Pricing, B2C scenario list price, and B2B scenario customer-specific prices, as well as marketing campaigns with "special prices"
- Shopping basket: Selection for the shopping basket can be filled by simply clicking on and then saving products prior to final ordering and purchasing
- Registering new customers: You can register new customers in B2B, define a contact person in B2B, and perform self-service address changes
- Payment processing is possible per invoice, for cash-on-delivery and credit card
- Order status

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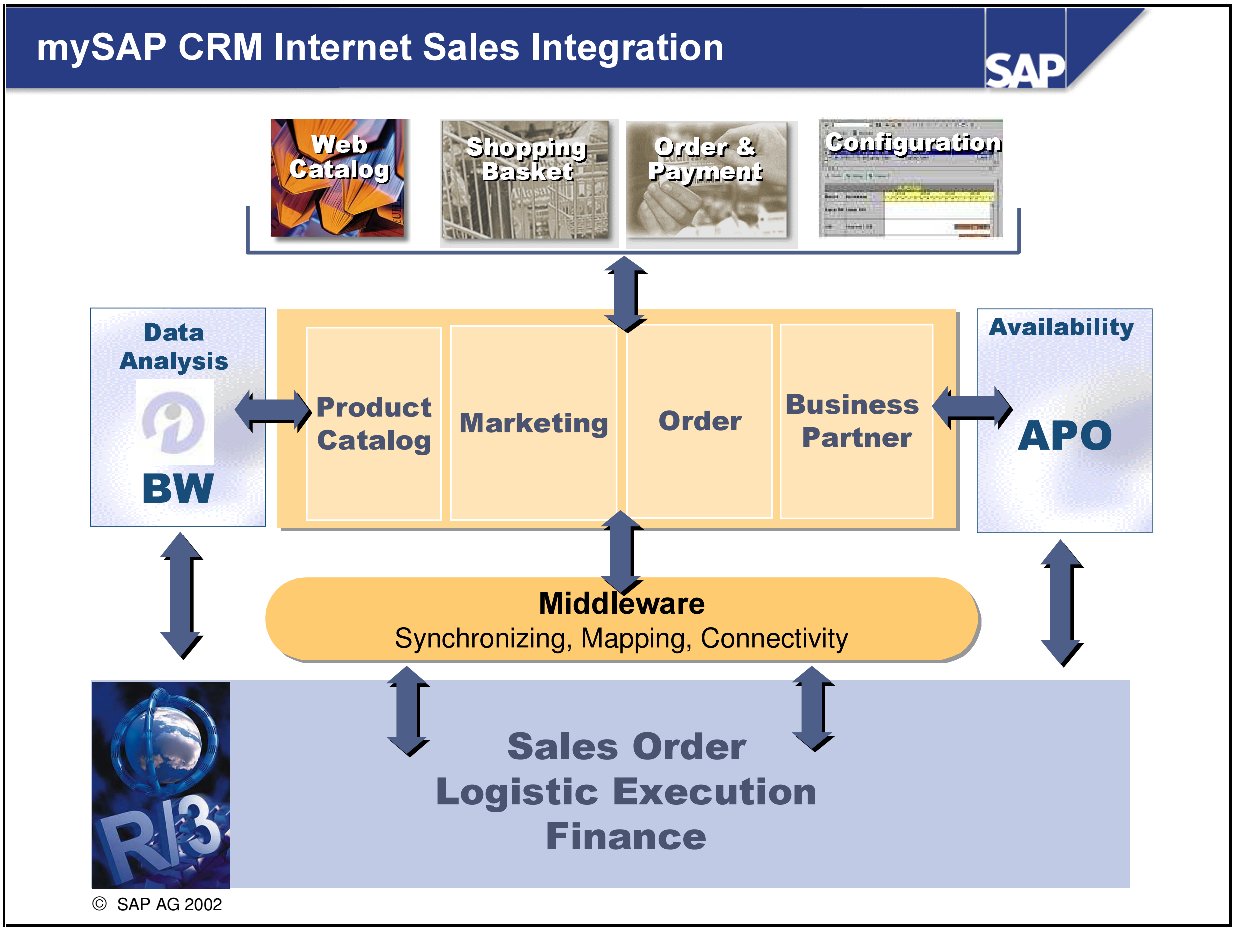
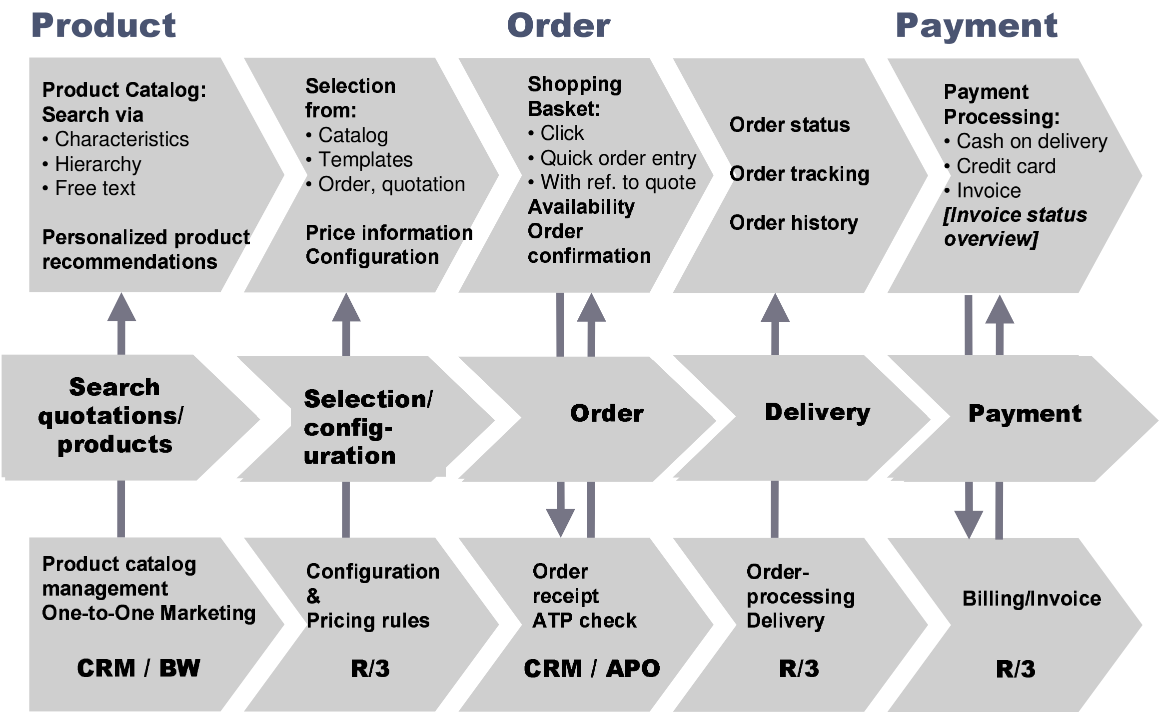


- SAP Internet Sales is a solution for companies using the Internet as their strategic sales channel. The following are possible with Internet Sales: 1:1 marketing, sales analysis, product promotions, individual and effective Web design, product configuration, user-friendly entries, price guarantees, various interaction possibilities, and so on. Companies that have implemented Internet Sales generally also use the other processes that are supported by SAP Internet Sales.
- Completely integrated in the Customer Relationship Management processes:
  - Other sales channels
  - Marketing functionality
  - Interaction Center
  - Execution logic in SAP R/3

Internet Sales Processes

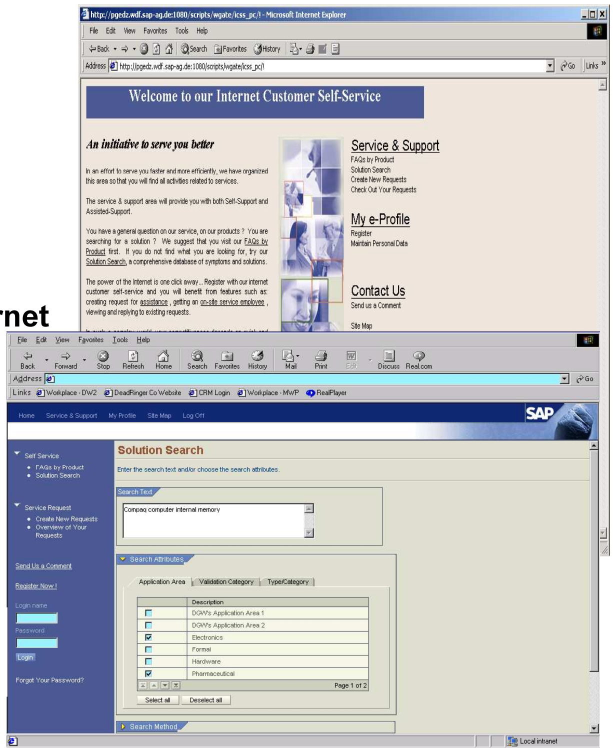


Internet Customer Self-Service

Features:

- **Questions on Products**
  - **FAQs on products**
- **Customer Service Support**
  - **Service questions via the Internet**
  - **Call-me-back button**
  - **Interactive solution search**

Example of search using the Internet Customer Self-Service



- The Internet Customer Self-Service uses the Internet for the service area.
- Customers can access information themselves here, for example, questions on products. They can search for answers and solutions themselves in an FAQ database.
- Service queries can be sent via the Internet. Customers can track the processing status and progress of their query directly in the Web.
- In case customers would like to contact the enterprise directly, there is also a "*call-me-back*" button that transfers the query to an agent.
- Searching independently for information on products or problems via the Customer Self-Service has advantages for everyone.
- Advantages for your customers:
  - They have access to information at any time
  - They can contact your company to send you queries and requests at any time
- Advantages for your company:
  - Reduction of interaction costs via the Internet Service offer as an alternative to queries in the Interaction Center
  - Reduction in work load for your help desk and hotline

CRM Internet Sales: Unit Summary

You are now able to:

- Describe the differences between the R/3 Online Store and SAP Internet Sales
- Discuss the interaction between various systems
- Discuss the features of Internet Sales
- Create and display a customer order using the Internet
- Display the Internet order in the R/3 OLTP System

Internal Use SAP Partner Only

Exercises

Unit: Internet Sales
Topic: Ordering from the Internet

At the conclusion of this exercise, you will be able to:

- Register on PC4You's Web page as a new customer
- Create an order through the Internet

You need some new computer hardware. You would like to log onto the PC4You Web shop to create an order for a laptop and some additional hardware.

1-1 Display the PC4You Web Shop using the Internet Explorer.

You'll find a mail in your inbox of the Business Workplace with a link to B2C Internet Sales Web shops. Select the PC4You Web shop in your own language.

1-2 First-time customers must first register with PC4You to purchase goods.

1-2-1 Register as a new customer in the PC4You Web shop.

Form of Address:	**Mr.**
***First Name*:**	**James**
***Last Name*:**	**Jones ## (## = your group number)**
Street:	**S. Havana St**
House Number:	**1255**
Postal Code:	**80013**
***City*:**	**Aurora**
***Country*:**	**United States**
***Region*:**	**Colorado**
***E-mail Address*:**	**James.Jones##@sap.com**
Password:	**enjoy**
***Repeat Password*:**	**enjoy**

Select the ***Store*** button to save your customer data.

Internal Use SAP Partner Only

1-3 You would like to order a laptop. Look through the product catalog and submit an order to PC4You.

1-3-1 Add the following product to your shopping basket:

Products → Computers → Notebooks

Description:	**Notebook Professional 15**
Material Number:	**HT-1010**

optional: configurable products

In the product catalog, select:

Products → Computers → Configurable Systems

Description:	**Campus PC**
***Material Number*:**	**SCE_PC**

Configure the product (using the Spanner icon)

1-3-2 Now navigate to your shopping basket and from there go to *Check Out*.

Check your order for products, quantities and prices, choose ***Invoice*** for the payment type and then select ***Order***. Don't forget to accept the general terms and conditions. Make a note of the order number.

Order number: ____

Internal Use SAP Partner Only

Exercises

Unit: Internet Sales

Topic: Viewing Internet Orders in CRM

At the conclusion of this exercise, you will be able to:

- Display a business partner that was created in Internet Sales
- Display a sales order that was created in Internet Sales

You would like to call up information from orders that were created in CRM using the Internet.

2-1 Display your new business partners who registered in the Web shop in CRM.

2-1-1 Select ***Master Data*** → ***Business Partner*** → ***Maintain Business Partner*** and display your business partner. Use the search help to search for your customer by last name.

Use the last name **Jones ##** for the search.

2-1-2 What is the business partner number that was created?

2-1-3 What is the e-mail address for this business partner?

2-2 View the order created in CRM.

2-2-1 Navigate to the ***Maintain Sales Orders*** function and display the order you created in exercise 1-3-2.

2-2-2 What is the transaction type used for creating the order?

2-2-3 Which sales organization is assigned to the order?

Exercises

Unit: Internet Sales

Topic: Viewing Internet Orders in R/3

At the conclusion of this exercise, you will be able to:

- Display a business partner that was created in Internet Sales
- Display a sales order that was created in Internet Sales

You would like to call up information from orders that were created in SAP R/3 using the Internet.

3-1 View your business partner in SAP R/3.

3-1-1 Select ***Logistics*** → ***Sales and Distribution*** → ***Master Data*** → ***Business Partners*** → ***Customer*** → ***Change*** → ***Sales and Distribution*** and display your customer using the search help to search for your customer, **Jones ##.**

Use the search term **Jones ##.**

3-1-2 What is the business partner number created in R/3?

____

3-2 View the order created in R/3.

3-2-1 Display the order you created in exercise 1-3-2 in R/3.

3-2-2 What type of customer order has been created in R/3?

____

Solutions

Unit: Internet Sales

Topic: Ordering from the Internet

1-1 Display the B2C Internet Sales Web shops. Select the **PC4You** Web shop in your language.

You'll find a mail in the Business Workplace inbox with a link to the B2C Internet Sales Web shops. Select the **PC4You** Web shop in your language.

1-2 First time customers must first register with PC4You to purchase goods.

1-2-1 Register as a new customer in the PC4You Web shop.

Form of Address:	**Mr.**
***First Name*:**	**James**
***Last Name*:**	**Jones ## (## = your group number)**
***Street*:**	**S. Havana St**
Street Number:	**1255**
Postal Code:	**80013**
***City*:**	**Aurora**
***Country*:**	**United States**
***Region*:**	**Colorado**
***E-mail Address*:**	**James.Jones##@sap.com**
Password:	**enjoy**
***Repeat Password*:**	**enjoy**

In the Web shop, select ***Logon*** and then ***New User: Registration***. Enter the above information and then ***Save*** to save your data.

You should now get a personal welcome on the initial screen after logging on.

Internal Use SAP Partner Only

1-3 You would like to order a laptop. Look through the product catalog and submit an order to PC4You.

1-3-1 Add the following product to your shopping basket:

Products → Computers → Notebooks

Description:	**Notebook Professional 15**
Material Number:	**HT-1010**

optional: configurable products

In the product catalog, select:

Products → Computers → Configurable Systems

Description:	**Campus PC**
Material Number:	**SCE_PC**

Configure the product (using the Spanner icon)

Configuration takes place in three steps: First, configure the ***Hardware Basics***, then the ***Hardware Options,*** and finally the ***Software***.

You have to select ***Copy*** afterwards in order to return to the product range. From here, you can place the configured product in the shopping basket.

1-3-2 Now navigate to your shopping basket and, from there, on to the cash desk.

Check your order for products, quantities and prices, choose ***Invoice*** for the payment type and then select ***Order***. Don't forget to accept the general terms and conditions. Make a note of the order number.

Internal Use SAP Partner Only

Solutions

Unit: Internet Sales

Topic: Viewing Internet Orders in CRM

2-1 Display your new business partners who registered in the Web shop in CRM.

2-1-1 Select ***Master Data → Business Partner → Maintain Business Partner*** and search for your business partner by using the last name as a search help.

SAP Menu → Master Data → Business Partner → Maintain Business Partner

Select F4 (Search help).

In the Name 1/ Last Name field, enter Jones ## and then select Enter.

Select the appropriate business partner.

2-1-2 What is the business partner number that was created?

Make a note of the business partner number.

2-1-3 What is the e-mail address for this business partner?

The e-mail address is on the ***Address*** tab page in the ***E-mail*** field.

2-2 View the order created in the CRM System.

2-2-1 Navigate to the ***Sales Order Maintenance*** function and display the order you created in exercise 1-3-2.

SAP Menu → Sales → Maintain Sales Orders

Transaction → Other Transaction

In the Transaction Number field, enter the order number that was created in Internet Sales and select Enter.

2-2-2 What is the transaction type?
Go to the ***Header Overview*** tab page, and select the
Transaction Type : **ZIS Internet Sales** field

2-2-3 Which sales organization is assigned to the order?
Select ***Organization*** on the tab page and then select the
Sales Organization: ***Sales US*** field

Solutions

Unit: Internet Sales

Topic: Viewing Internet Orders in R/3

3-1 View your business partner in SAP R/3.

3-1-1 Select *Logistics → Sales and Distribution → Master Data → Business Partners → Customer → Change → Sales and Distribution* and display your customer using the search help to search for your customer Jones ##.

Use the search term **Jones ##.**

During the search using the F4 Help, choose ***General Debtors*** on the tab page and enter **Jones ##** in the search help field.

3-1-2 What is the business partner number that was created?

The number assigned by the system assigned will be the same as the CRM business partner number.

3-2 View the order created in R/3.

3-2-1 Display the order you created in exercise 1-3-2 in R/3.

Logistics → Sales and Distribution → Sales → Order → Change

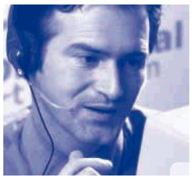
Enter the order number from the CRM System from exercise 1-3-2 and choose ***Enter***.

3-2-2 What type of customer order has been created in R/3?

Select *Goto→ Header → Sales:*

Field *Order type*: **ZIS Internet Sales CRM**

CRM Interaction Center



Contents:

- **The Interaction Center (IC) Basics**
- **Telesales and Teleservice**
  - **Functions and Scope of Functions (Inbound and Outbound Processes)**

CRM Interaction Center

At the conclusion of this unit, you will be able to:

- **List the CRM Telesales and Teleservice features**
- **Describe the integrated IC technology**
- **Describe the Inbound and Outbound Telesales processes**
- **Use the functions for the product proposal, interactive scripting and the Interactive Intelligent Agent**

Course Overview Diagram

Marketing | **Sales** | **Service**

Task

Customer

Relationship

Management

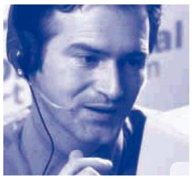
Contact Channel

Interaction Center

Internet

Mobile

CRM Interaction Center: Business Scenario



- IDES, Inc. would like to incorporate Telesales business processes into its own business process.
- IDES, Inc. is implementing the IC component of SAP CRM.
- To familiarize yourself with the Telesales functionality, you want to simulate an Inbound Telesales process including order entry.

IDES inc.

CRM Contact Center: Work Center

IC Work Centers: Functions

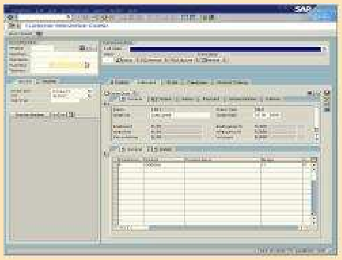
- Sales, Service, Marketing
- Telephone Integration
- E-mail integration
- Internet integration

Configuration of the Work Center

IC Work Center:

Individual Configuration for:

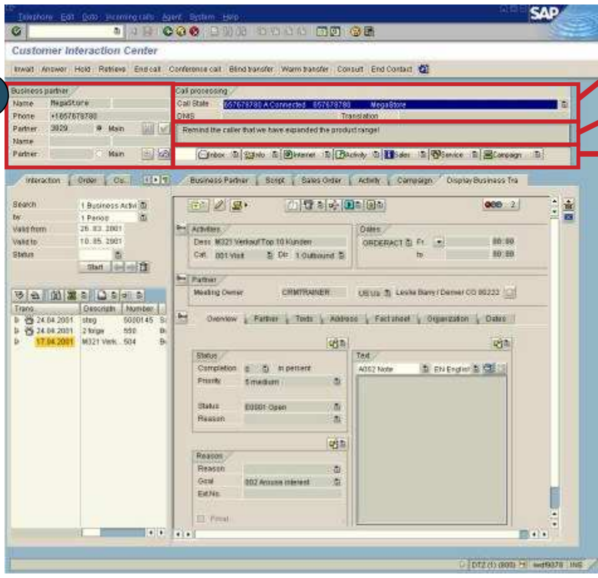
- Entire Call Center
- Groups of Agents
- Individual Positions



- The Interaction Center supports the three central CRM strategies:
  - Sales: processing of sales transactions, opportunities, product proposals
  - Service: e-mail processing and workflow, solution database, service transactions
  - Marketing: campaigns / call lists; product proposals
- The Interaction Center supports various media:
  - Telephone: incoming / outgoing calls, routing, call lists, CTI (Computer Telephony Integration) connection
  - E-Mail Handling
  - Internet: inclusion of Internet and intranet pages, co-browsing, call-me-back, Web chat, Web telephony
- You can control which of these functions are used by individual agents, agent groups or entire call centers by assigning individually configured profiles.

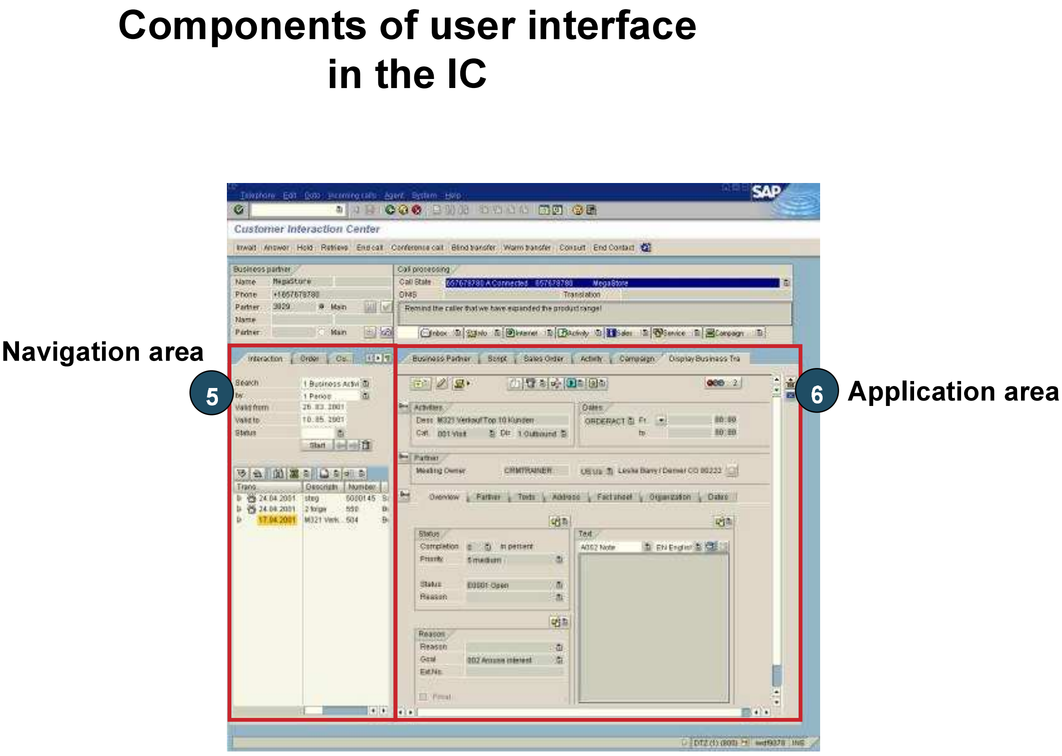
Interaction Center: Components (1)

Components of user interface in the IC



- The components can be used on the user interface for the Interaction Center, if need be. Components provided by SAP are:
  - Business partner: Here, the business partner and contact person are identified automatically (ANI: automated number identification) or entered manually. You can use various data to search for business partners on the *Business Partner* tab page in the application area. You can also maintain the corresponding data fields for the master record here.
  - Call status: Here, the system displays which telephone number the agent is connected to, and which business partner matches this number. The status displays, for example, whether the conversation was accepted, interrupted or, ended. A further status interprets the number selected by the customer (DNIS: dialed number identification system). This enables you to recognize, for example, whether it is the sales or the service hotline.
  - Reminder scripting: Here, you can display short information based on events or system activities.
  - Action box: You can call up various functions via pushbuttons or menus in the action box: call up hidden tab pages in the applicationa area; transactions in other SAP systems (R/3, APO), Internet and intranet pages. Variables can be copied to each of these transactions (for example, business partner data).

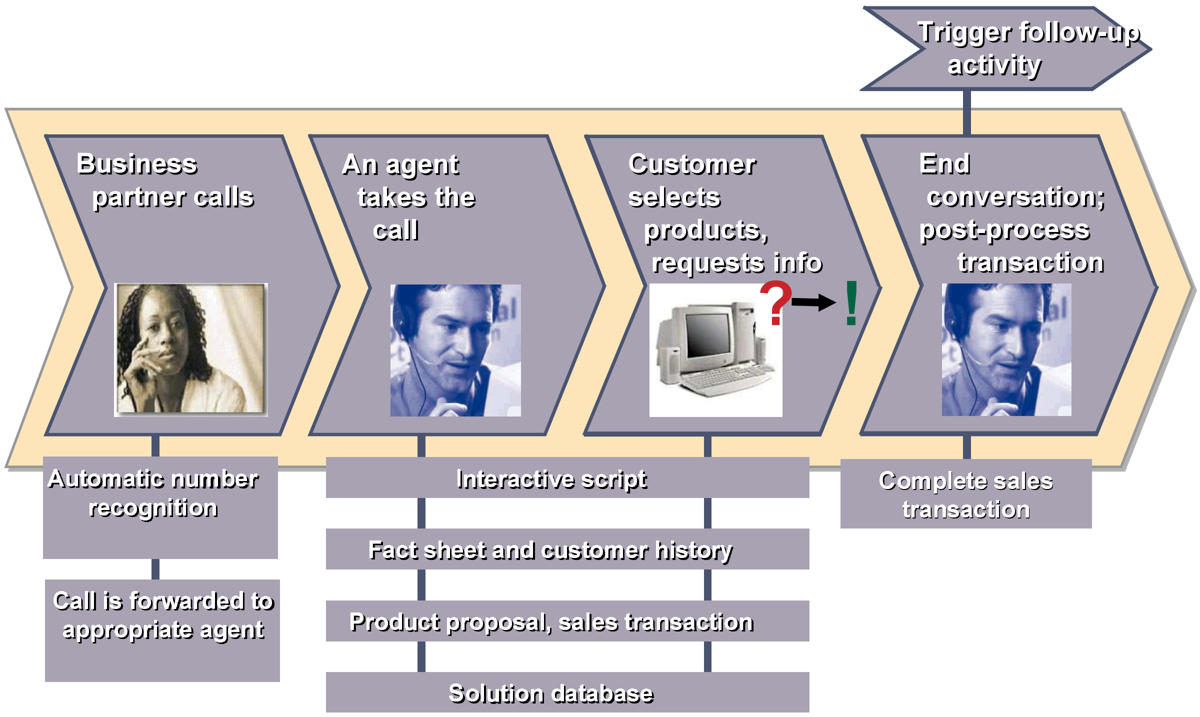
Interaction Center: Components (2)



- Navigation area: The interaction history for the business partner is displayed here. Product proposals are also offered for selection, on the basis of various strategies. You can select relevant transactions from the interaction or products from the transaction list by double-clicking on them, and then copy them to the application area. Customer service is supported by a list of the customer's IBase (installed base).
- Application area: The tab pages of the application area can also described as workspaces. Various tab pages can be used, such as:
  - Business partner search and maintenance, customer fact sheet
  - Transaction processing: create, change, and display opportunities, activities, sales and service transactions
  - Incoming and outgoing e-mail workflow
  - Solution database
  - Internet and intranet pages
- A bar is available with buttons for telephony functions.
- Customer-specific components can be programmed and integrated into the interface.

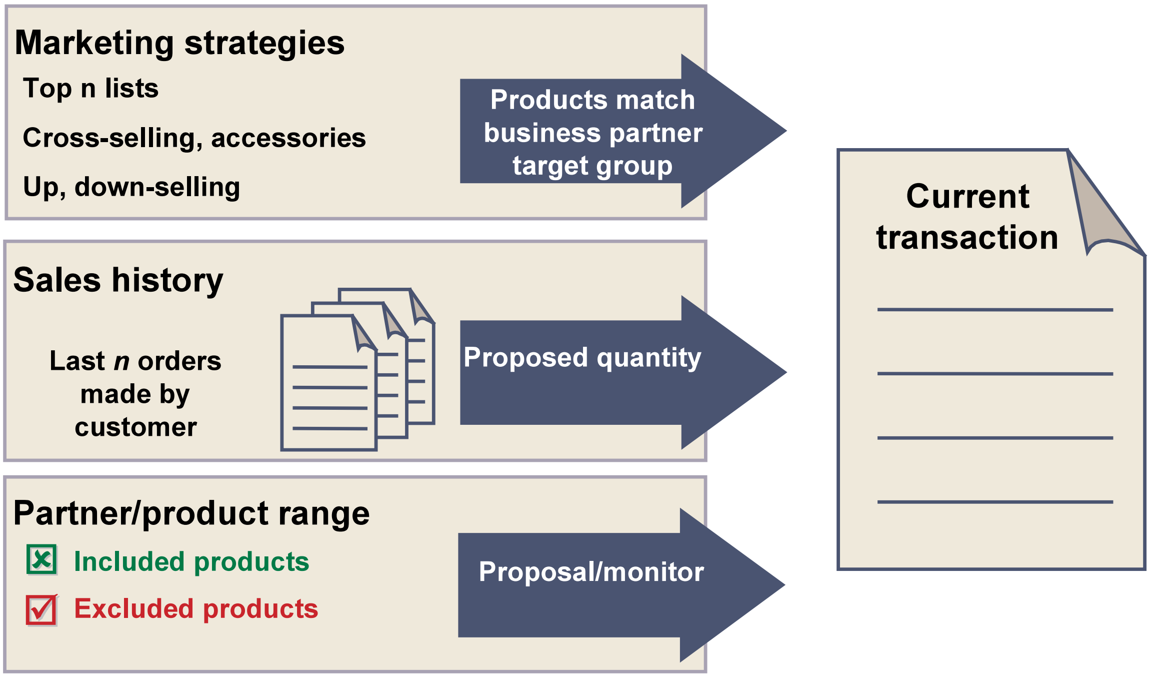
Internal Use SAP Partner Only

Telesales: Incoming Call



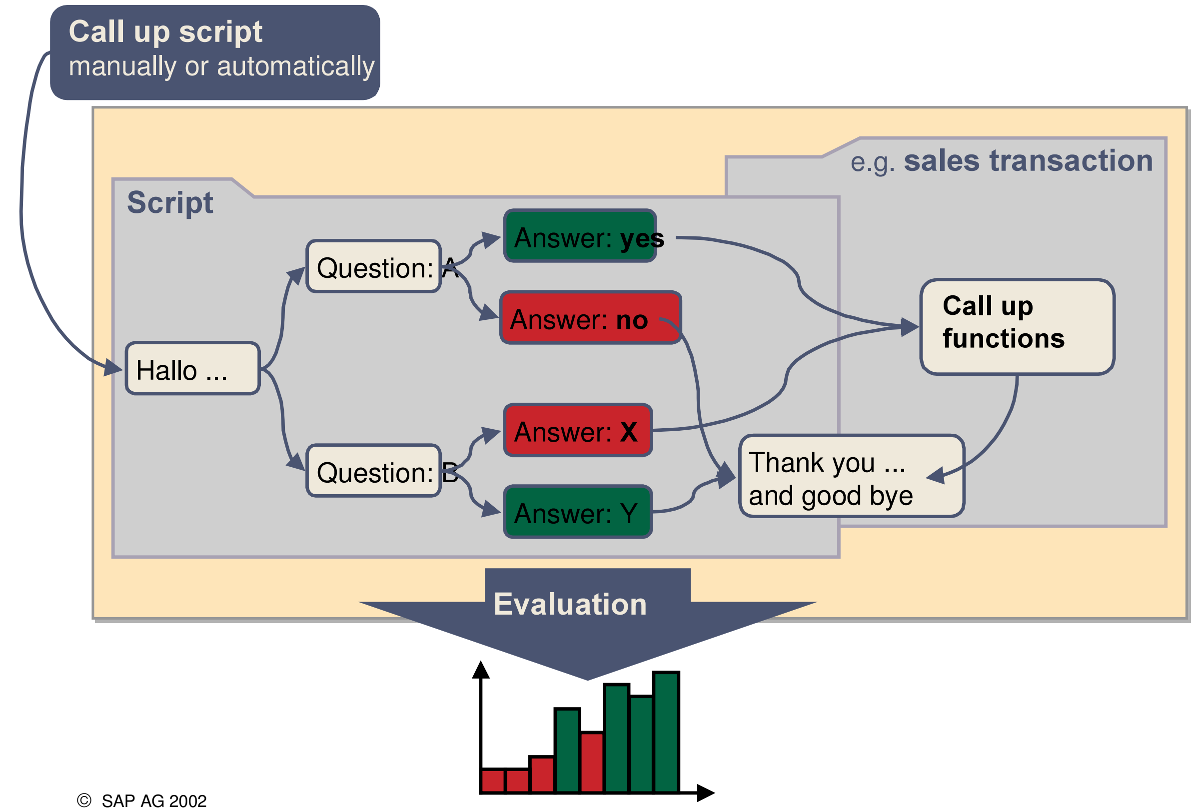
- The customer calls and is identified by his telephone number (ANI: automatic number identification) and forwarded to an appropriate agent (business routing in the CTI). The agent's telephone rings and the identified customer is displayed on the screen (number, name, address data).
- The agent accepts the conversation and can use an interactive script to support the dialog with the customer. He has access to customer information in the fact sheet (application area) and in the interaction history (navigation area).
- Sales transactions are supported by product proposals. Product information (screen, product master, and document management is found in the product info (application area). The transactions can be monitored by credit management. The customer has the option of paying via credit card, cash on delivery, or invoice. In the solution database, the agent can search for solutions to problems or appropriate answers to customer questions.
- Along with sales transactions, the agent can also maintain other transactions such as activities, opportunities, and service transactions.

Product Proposals in the IC: Strategies



- The agent has several options for calling up product proposals when entering sales transactions in the IC:
- Product proposal from Marketing: mySAP CRM Marketine enables the system to propose products appropriate to the business partner (compare unit: Marketing Planning and Campaign Management). Top n list, cross-selling, accessories, and up- and down-selling strategies can be used individually or in combination.
- The various product proposals can be supplemented with proposed quantities from the customer sales history, for example, from the last 5 orders.
- The partner/product range is also supported by the IC. Lists of products or product categories are available, which are excluded or included for specific business partners or groups of business partners. The partner/product range can be used to propose and select products as well as to monitor exclusion requirements.
- An availability check is carried out for the ordered products (ATP check via APO).
- Pricing, maintenance, and variant configuration are available in the Interaction Center.

Interactive Scripting



- Scripts provide interactive reminder scripting, that help the agent to communicate with business partners. The agent can select and call up scripts manually. Scripts can also be linked to a Marketing campaign. In this case, the script opens automatically, as soon as a call is carried out for the campaign. The agent also has the option of specifying events which enable a specific script to be called up.
- The script provides question and answer alternatives, which the agent can use during his conversation with the customer. The script can call up specific transactions, depending on the customer's answer. The script can branch to the order entry transaction, for example. The agent can branch back from the transaction at any time. In addition to transactions in CRM, the script can call up transactions in other SAP systems (R/3, APO), as well as Internet and intranet pages.
- The conversation is saved as a history. This enables the agent to access information on the customer's previous answers during the conversation. The conversations can also be evaluated statically and used by Marketing to distribute the business partners to target groups.

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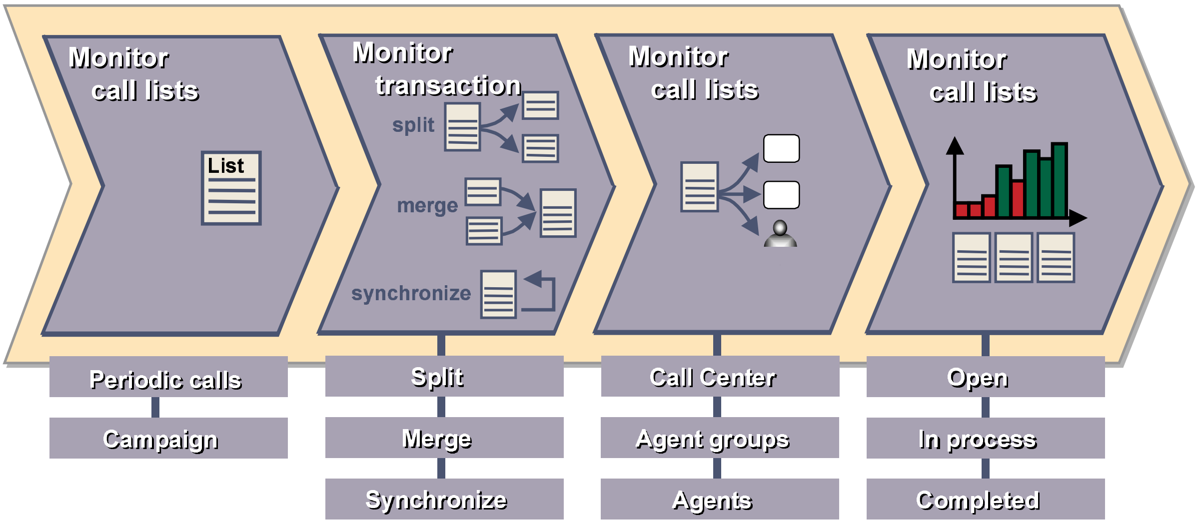
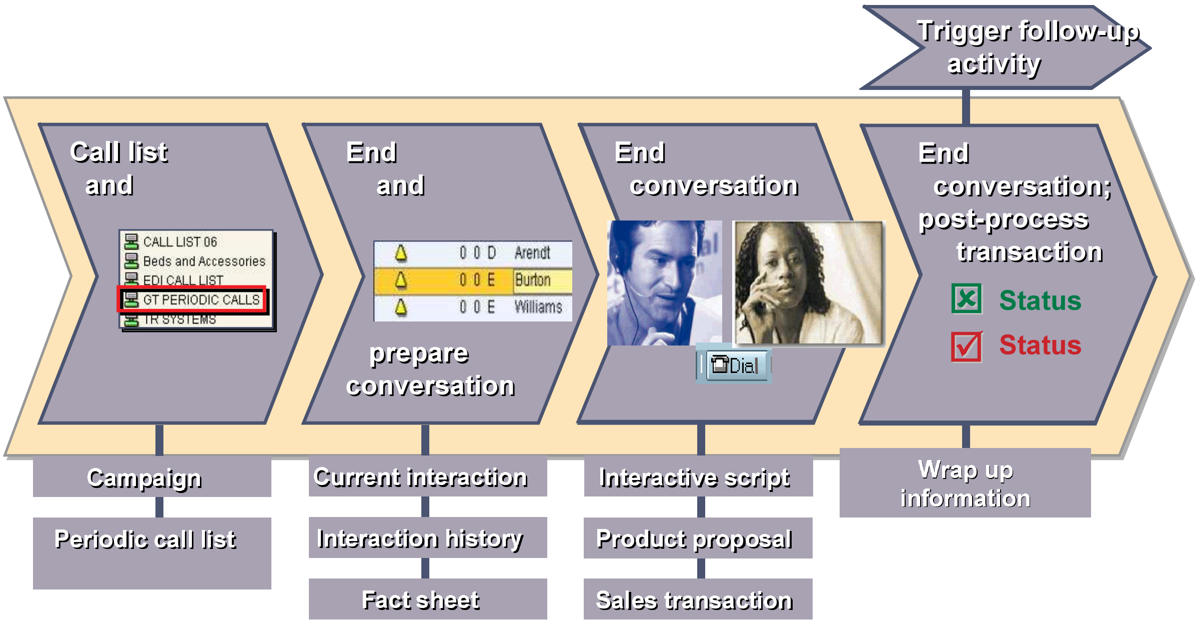
Managing Call Lists



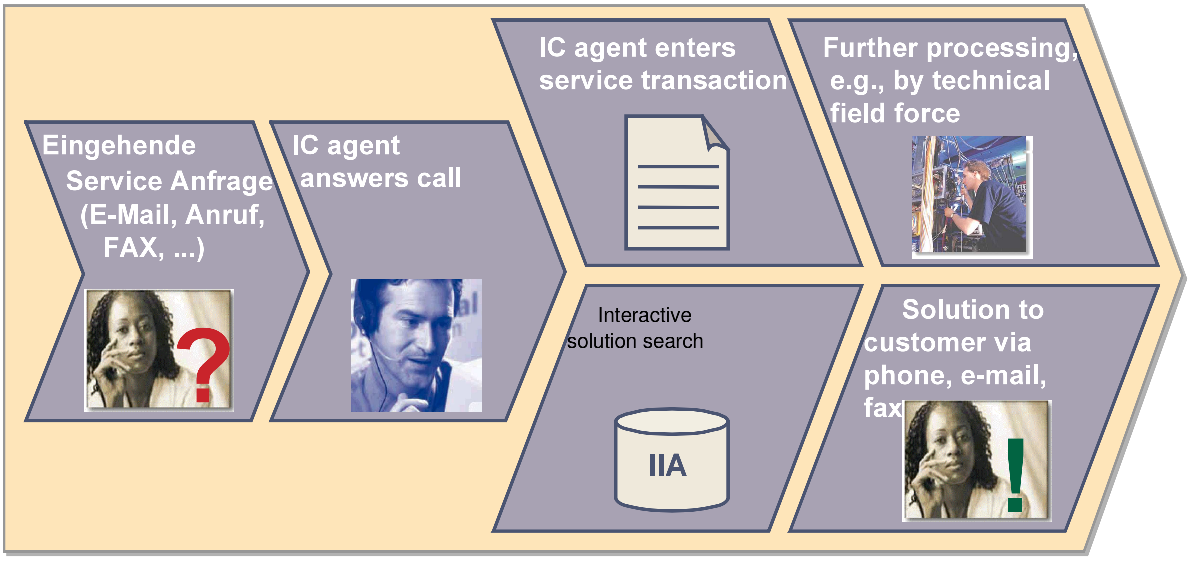
- Either the call list is based on the target group in a campaign, or it is created as a periodic call list, based on the business partners' preferred calling hours.
- Call lists can be split and merged. Individual calls can be removed from or added to the lists. The synchronization of call lists means that the agent can specify the time frame and, in addition to the main business partners, select the appropriate contact persons.
- The call lists are then assigned to the relevant organizational units, groups of agents, or individual positions for processing.
- Reports are available to monitor call list processing.

Telesales: Outgoing Call



- The call list (for campaign or periodic calls) is assigned to agents for processing.
- The agents selects a campaign for processing from a list.
- A list of business partners to be contacted is displayed.
- The agent selects a business partner and clicks on the *"Dial"* button.
- The agent connects to the customer.
- Depending on the campaign, the system either displays the planned activity or starts the script.
- The agent must flag the call as **Completed** or **Failed.** A completed call is selected correspondingly in the call list. A call with the status of **Failed** can be selected again at a later date.

IC Service Business Scenario



- The Interaction Center also supports business processes in Service. A service request comes into the IC as a call, e-mail, or fax, for example, and is forwarded to an appropriate agent. The SAP workflow is available for this. A rules-based selection of appropriate agents must also be carried out in the CTI (Computer Telephony Integration) via business routing. The agent takes the call and decides how to proceed further. Various scenarios are available, which can be used individually or in parallel:
  - The agent recognizes that the customer needs support from a technician, and enters a service process (compare unit on transaction processing). The service process is traced further by an employee in the field.
  - The agent starts the Interactive Intelligent Agent to find an appropriate answer to the customer's inquiry. The agent can inform the customer of the appropriate solution over the phone, by fax, or by e-mail.
- The Interaction Center offers support for Internet customers. A "*call-me-back*" button can be integrated into CRM Web shops. If the customer chooses this button in the Internet, the agent calls him back. An IC agent can give the customer additional information, or support the customer during navigation in the Internet via "co-browsing". The agent takes over navigation of the screen in the customer's Internet browser. "Web chat" and "Web telephony" are also supported; however, you need complementary software before you can use these products.

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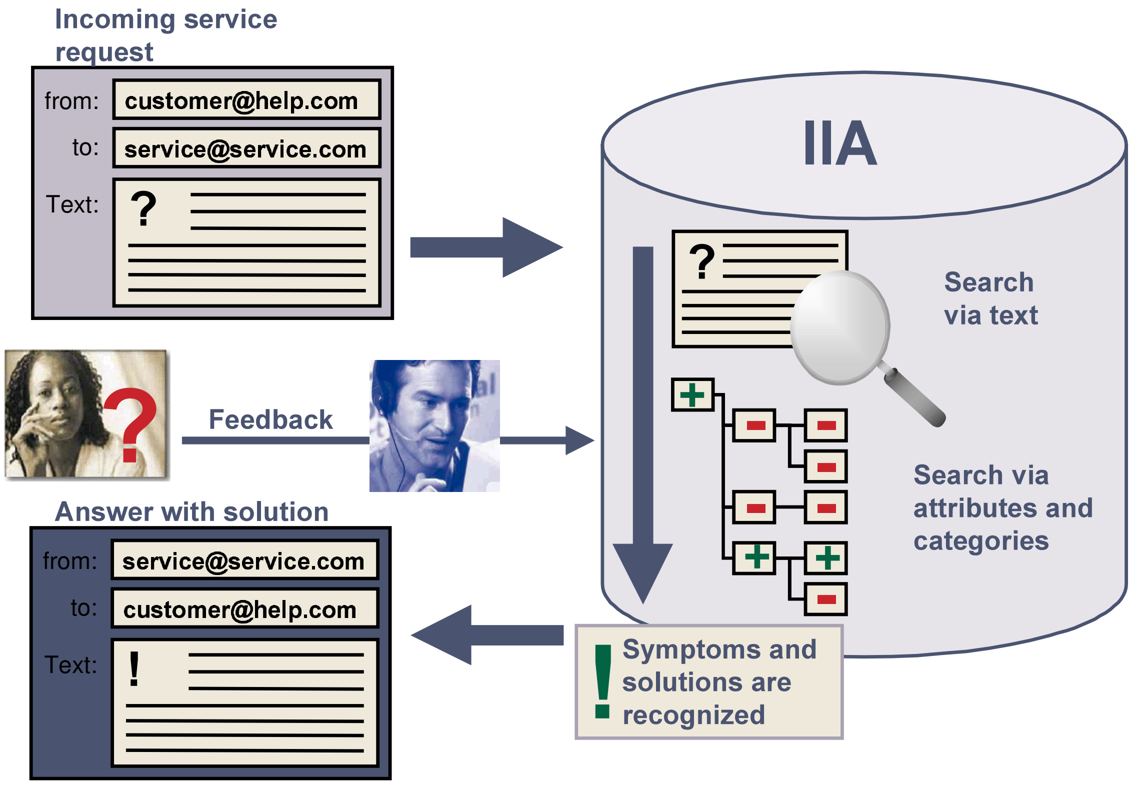
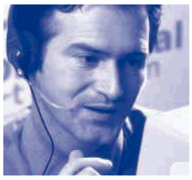
IC: Using the Interactive Intelligent Agent (IIA)



- The Interactive Intelligent Agent (IIA) uses the description to search for appropriate solutions for external and internal questions and problem messages. The IIA can also be used as an IC-independent work center. Customers and field sales representatives can also use it as an Internet self service. The IIA may, for example, be used for a customer inquiry that arrives in the Interaction Center by e-mail.
  - The IIA uses the entire e-mail text. The agent can optimize the search by reducing the text to the relevant parts. The text is automatically matched with the symptoms saved in the database. The text search also contains a phonetic search.
  - The agent can enhance or restrict the range of the text search by assigning the problem to predefined categories. The categories and attributes can be freely defined as a hierarchical system, and in an unrestricted number.
  - Solutions are assigned to the symptoms determined in the database. As a result, the agent receives a hit list in which the symptoms and solutions found are listed according to the extent to which they match the texts and attributes.
  - The agent selects one or several solution proposals and copies them into the e-mail reply to the customer.
  - Feedback from the customer and/or agent is used to continuously optimize the agent.

CRM Interaction Center: Conclusion



You are now able to:

- List the CRM Telesales and Teleservice features
- Describe the integrated IC technology
- Describe the Inbound and Outbound Telesales processes
- Use the functions for the product proposal, interactive scripting and the Interactive Intelligent Agent

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Exercises

Unit: Interaction Center - Sales

Topic: Simulate an Incoming Phone Call and Take an Order

At the conclusion of this exercise, you will be able to:

- Navigate in the Interaction Center
- Take orders in the Interaction Center
- Enter activities in the Interaction Center

You are an Interaction Center agent at PC4You, and you take incoming telephone calls. In this example, the customer Sandra ##Turner calls and wants to order some products.

PC4You has set up interactive scripting to guide their agents through sales calls.

Customers can be automatically identified (ANI: Automatic Number Identification) in CRM with a Computer Telephony Integration (CTI) connection. The identified business partner is then automatically displayed on the agent's screen. However, since nobody is calling us in the classroom, we have to simulate that the customer Sandra ## Turner calls the Interaction Center.

1-1 You log onto the Interaction Center to receive incoming calls.

1-1-1 Start the Interaction Center.
If the systems asks you to maintain your settings, enter phone extension **99##** (## being your group number), select For *ACD Functions and Server Simulation IDES* as telephony server (no). Save these settings and choose the pushbutton to go back.

1-1-2 A call comes in, but the ANI cannot automatically identify the business partner. The person on the telephone is called **Sandra ##Turner** (## stands for your group number; for example, if your group is **01**, enter **01 Turner** in the first name field of the business partner search).

Confirm Sandra ##Turner as a business partner for this call (without this confirmation, no business partner-specific information or functions would be available in the Interaction Center).

1-1-3 Start **Callcenter EN** interactive script.

What is the first question you are supposed to ask the customer?

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1-2 Sandra ##Turner is interested in buying some products from you.

1-2-1 Choose the pushbutton ***Sales order*** in the script mode. What is the next question you should ask the customer?

1-2-2 Sandra ##Turner wants to place the order via the phone. Select the corresponding action in the script.

1-2-3 On the ***Order*** tab page in the navigation area, the system automatically proposes a list of products that Sandra ##Turner often buys. You discuss these products with her and she wants to order **one piece** of product **HT-1010**. Double-click on the product to copy it to the ***Product Info*** tab page. Here, you receive further information on the selected product. Enter the required quantity and transfer the product to the sales order.

Choose the blue arrow to copy the product to the ordered list.

1-2-4 Which cross-selling product is proposed by the Interaction Center for the product HT 1010?

You ask the customer if he/she would like a product in addition to the notebook. Mrs ##Turner decides to buy a printer. Copy product HT 1051 to the ordered list within the sales order.

1-2-5 In order to prepare the sales order, you have to enter some additional information in the application area of the sales order:

Description:	**PC for ##Turner**
***Ext.* Reference:**	**CR010##**

1-2-6 Save the order and record the order number.

1-3 Go back to the script.

1-3-1 What are you supposed to tell the customer?

1-3-2 This call is now completed. End the script. End the contact.

Exercises

Unit: Interaction Center - Service

Topic: Creating an Activity and Resolving a Customer Problem

At the conclusion of this exercise, you will be able to:

- Navigate in the Interaction Center
- Resolve a customer problem using the solution database

You take a customer call as a customer service agent working in the PC4You Interaction Center. The customer has bought a computer mouse from PC4You and is missing a connection cable. You use the Interactive Intelligent Agent (IIA) to resolve the problem and e-mail the customer the results of the search.

1-1 A customer is calling the PC4You Interaction Center.

1-1-1 Sandra ##Turner calls to request information on a mouse bought at PC4You. Enter the call with the following information:

Name: **##Turner**

Make sure you confirm your business partner before you proceed.

Maintain Business Tr. tab page:

Choose ***Create Transaction*** and then choose ***Business Activity -> Incoming Phone Call*** from the drop-down list.

Description: **Inquiry for product information**

Note: **Missing mouse cable**

Save the activity and record the transaction number.

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1-2 You, as the customer service agent, use the Interactive Intelligent Agent (IIA) to solve the customer's problem.

1-2-1 Activate the Interactive Intelligent Agent (IIA).

1-2-2 Select the appropriate solution (in this case, a cordless mouse, as a cable is not necessary). Copy the solution to the results basket (***Add to Cart)***.

1-2-3 Transfer the results to the e-mail editor (***Send Cart choose in the drop-down list: To E-Mail Editor***) for the customer and change the last line of the e-mail to read:

Thank you for calling.

Your name

Send the results to the customer.

To transfer the results from your search when in the e-mail, select the ***Insert*** icon.

1-2-4 End the contact and answer the questionnaire about the usefulness of the IIA's solution to the customer's problem. This helps to optimize the quality of your solution database in the future.

1-2-5 Optional: View the just-sent e-mail in your Business Workplace inbox.

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Sales Solutions

Unit: Interaction Center - Sales

Topic: Simulate an Incoming Phone Call and Take an Order

1-1 You log onto the Interaction Center to receive incoming calls.

1-1-1 Start the Interaction Center.

SAP Menu → Customer Interaction Center → Customer Interaction Center

If the system asks you to maintain your settings, enter phone extension **99##** (## corresponds to your group number), select For *ACD Functions* and *Server Simulation IDES* as telephony server (no). Save your settings and choose the *Back* button to leave the settings.

The Interaction Center is then started.

1-1-2 A call comes in, but the ANI cannot automatically identify the business partner. The person on the telephone is called **Sandra ##Turner** (## stands for your group number; for example, if your group is **01**, enter **01 Turner** in the first name field of the business partner search).

Confirm Sandra ##Turner as a business partner for this call (without this confirmation, no business partner-specific information or functions would be available in the Interaction Center).

Choose the **green tick** to confirm this.

1-1-3 Start **Callcenter EN** interactive script.

What is the first question you are supposed to ask the customer?

The ***Script*** tab page is selected automatically in the work area. Choose **Callcenter EN**.

“Hello. Welcome to our call center. How can I help you?”

1-2 Sandra ##Turner is interested in buying some products from you.

1-2-1 Choose the **Sales order** button in the script mode. What is the next question you should ask the customer?

"Should I take your order now? Or would you prefer your personal sales representative to call you back?"

1-2-2 Sandra ##Turner wants to place the order via the phone. Select the corresponding action in the script.

Choose ***Take order*** in the script.

1-2-3 On the ***Order*** tab page in the navigation area, the system automatically proposes a list of products that Sandra ##Turner often buys. You discuss these products with her and she wants to order one piece of **product HT-1010**. Double-click on the product to copy it to the ***Product Info*** tab page. Here, you receive further information on the selected product. Enter the required quantity and transfer the product to the ordered list in your sales order. To do so, choose the **blue arrow key**.

1-2-4 Which cross-selling product is proposed by the Interaction Center for the product HT 1010?

The mobile printer **HT-1051** is proposed as a cross-selling product in addition to the notebook (***Order*** tab page in navigation area).

Ask the customer if he/she would like a product in addition to the notebook. Mrs ##Turner decides to buy a printer. Copy product HT-1051 to the sales order.

Select the product for this on the ***Order*** tab page and choose the **blue arrow key.**
As a result, the cross-selling product is copied to the ***Proposed Items*** tab page in the application area. Enter the required quantity here, and choose the **blue arrow key** to copy the products to ordered products.

1-2-5 In order to prepare the sales order, you have to enter some additional information in the application area of the sales order:

Description:	**PC for ##Turner**
Ext. Reference:	**CR010##**

1-2-6 Save the order and record the order number.

Choose ***Save order*** on the right-hand side of the work area.

The order number can be seen in the ***Telesales*** field on the ***General*** tab page of the *Maintain Business Transaction* workspace.

1-3 Go back to the script by selecting the ***Script*** tab page in the work area.

1-3-1 What are you supposed to tell the customer?

"Thank you for calling. Have a nice day. Goodbye."

1-3-2 This call is now completed. End the script. End the contact.

Choose ***End script*** to end the script. Choose ***End contact*** from the application toolbar.

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Service Solutions

Unit: Interaction Center - Service

Topic: Creating An activity and Resolving a Customer Problem

1-1 A customer is calling the PC4You Interaction Center.

SAP Menu → Customer Interaction Center → Customer Interaction Center

1-1-1 Sandra ##Turner calls to request information on a mouse bought at PC4You. Enter the call with the following information:

Name: **##Turner**

Make sure you confirm your business partner before you proceed.

Maintain Business Tr. tab page:

Choose ***Create Transaction*** and then choose ***Business Activity -> Incoming Phone Call***.

Description:	**Inquiry for product information**
Note:	**Missing mouse cable**

Enter the call with the information described and save your activity.

1-2 You, as the customer service agent, use the Interactive Intelligent Agent (IIA) to solve the customer's problem.

SAP Menu → Customer Interaction Center → Customer Interaction Center

1-2-1 Activate the Interactive Intelligent Agent (IIA).

Activate the IIA by choosing IIA from the *Info* drop-down list. In the call processing area. Select the ***IIA*** tab page.

1-2-2 Enter the term mouse for the search, and choose ***Search***. The results are then displayed. Select the appropriate solution (in this case, it is a cable-free mouse; a cable is not necessary).
Copy the solution to the results basket by choosing ***Add to Cart*** (this can be found to the right of the displayed results).

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1-2-3 Transfer the results to the e-mail editor (***Send Cart choose in the drop-down list: To E-Mail Editor***) for the customer and change the last line of the e-mail to read:

Thank you for calling.

Your name

Send the results to the customer.

Next, choose ***Send***.

To transfer the results from your search when in the e-mail, select the ***Insert*** icon.

1-2-4 End the contact and answer the questionnaire about the usefulness of the IIA's solution to the customer's problem. This helps to optimize the quality of your solution database in the future.

Select ***End Contact*** from the application toolbar and enter your feedback on the helpfulness of the solution.

1-2-5 Optional: View the just-sent e-mail in your Business Workplace inbox.

CRM Mobile

Contents:

- **Mobile Sales and Mobile Service**
- **Features of Mobile Sales**
- **Features of Mobile Service**
- **Mobile Sales Business Scenario**

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CRM Mobile Client: Unit Objectives

At the conclusion of this unit, you will be able to:

- List the functions of Mobile Sales and Mobile Service
- Discuss how data is distributed onto the mobile client
- Give an example for using Mobile Sales components

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Course Overview Diagram

Marketing | **Sales** | **Service**

Task

Customer

Relationship

Management

Contact Channel

Interaction Center

Internet

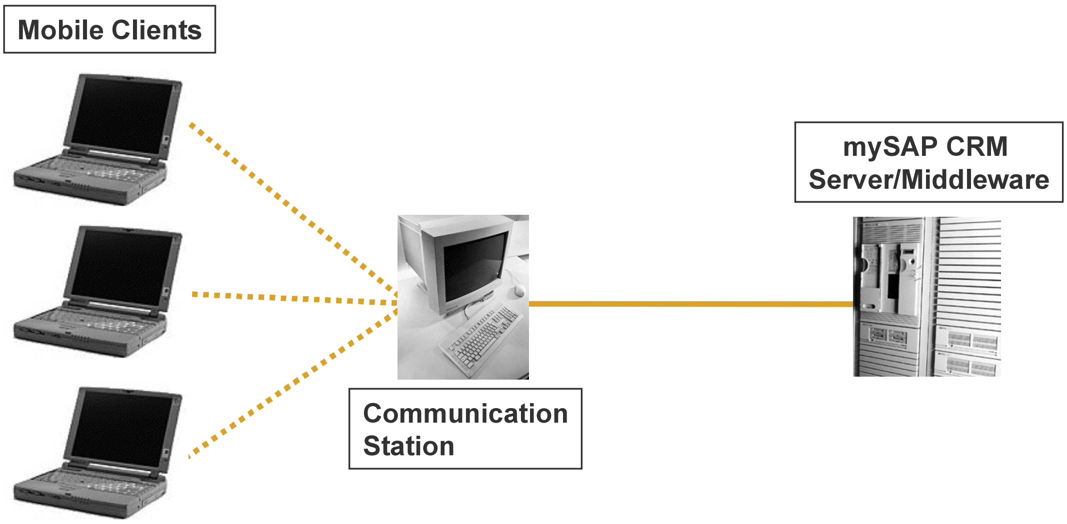
Mobile

CRM Mobile Client: Business Scenario

- Face-to-face contacts with the customer need to be recorded by field sales and service employees of IDES, Inc. This data should then be made available to the whole sales team
- The mobile sales client can be used for this
- IDES, Inc. needs to carefully review the Mobile Sales/ Service functionality to see if the solution meets their needs

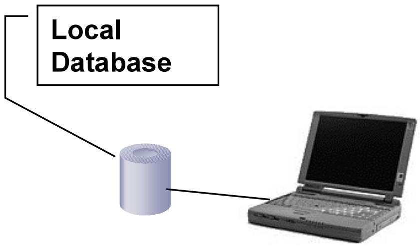
IDES inc.

Connecting the Mobile Client



- mySAP CRM Mobile Sales and Mobile Service support a company's mobile field sales and service employees.
- Users have complete access to all relevant information on their laptops; however, each user only has access to data in his area of responsibility (for example, all customers of one postal code).
- This data is updated by regular data exchanges between laptops and the central server. The communication station serves as a translation instrument between various data environments.

Features of the Mobile Client



- **Application Components**
  - **Mobile Sales**
  - **Mobile Service**
  - **Local Database in SQL Format**
  - **Components for Data Transfer**
- **E-Mail Service (MS Outlook or Lotus Notes)**
- **Office Package**

- The appropriate application (Mobile Sales/ Mobile Service) is installed on the laptop. It accesses a local database that provides the required information (business partner, products, sales documents, and so on). Necessary components are available in order to execute the exchange of data with the central server.
- Data exchange is possible between the mobile client and Microsoft Outlook / Lotus Notes (contact addresses, dates).
- Documents can be created and reports displayed using Microsoft Office Products, (for example order confirmation with Microsoft Word, or Microsoft Excel).

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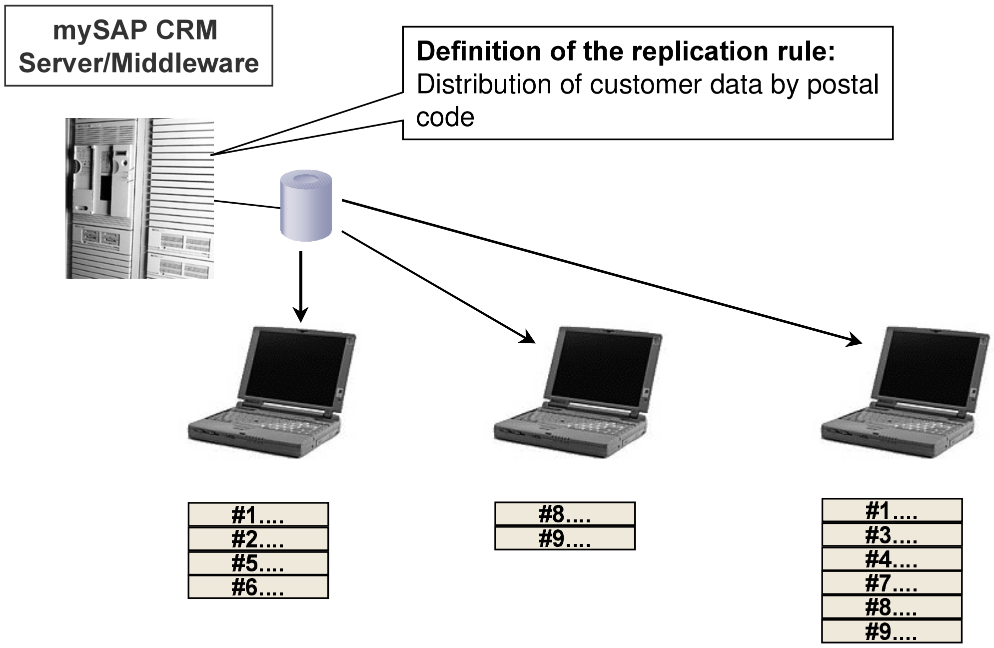
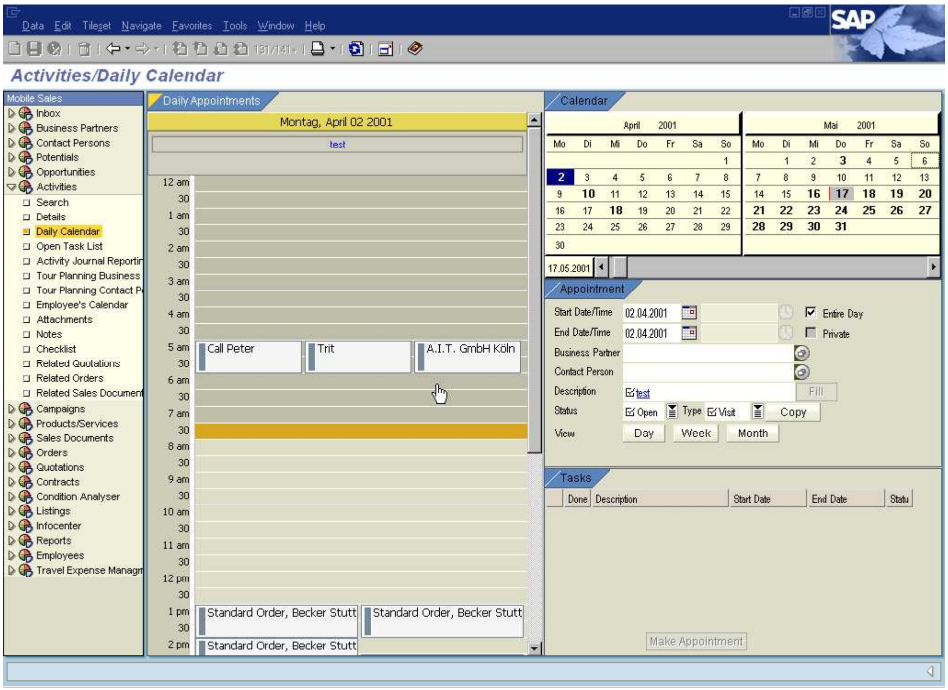
Data Distribution

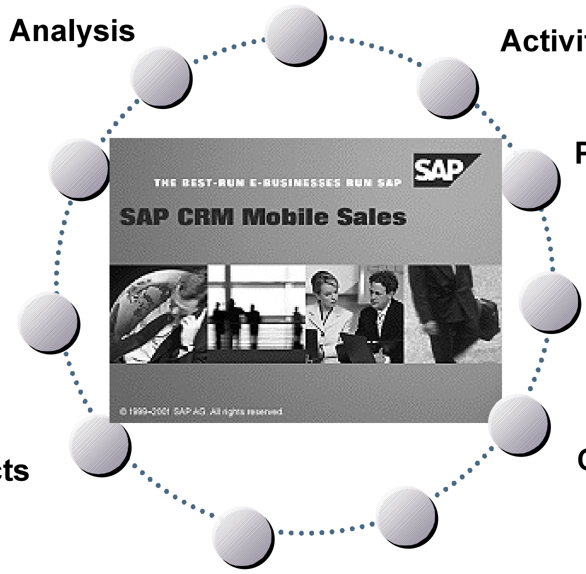


- Data can be distributed (replicated) onto individual laptops according to freely definable rules. These rules are defined on the level of the CRM server. Customer data could, for example, be distributed according to the postal code.
- When new data is created, it is automatically transferred during the next data exchange to the appropriate client according to these rules.

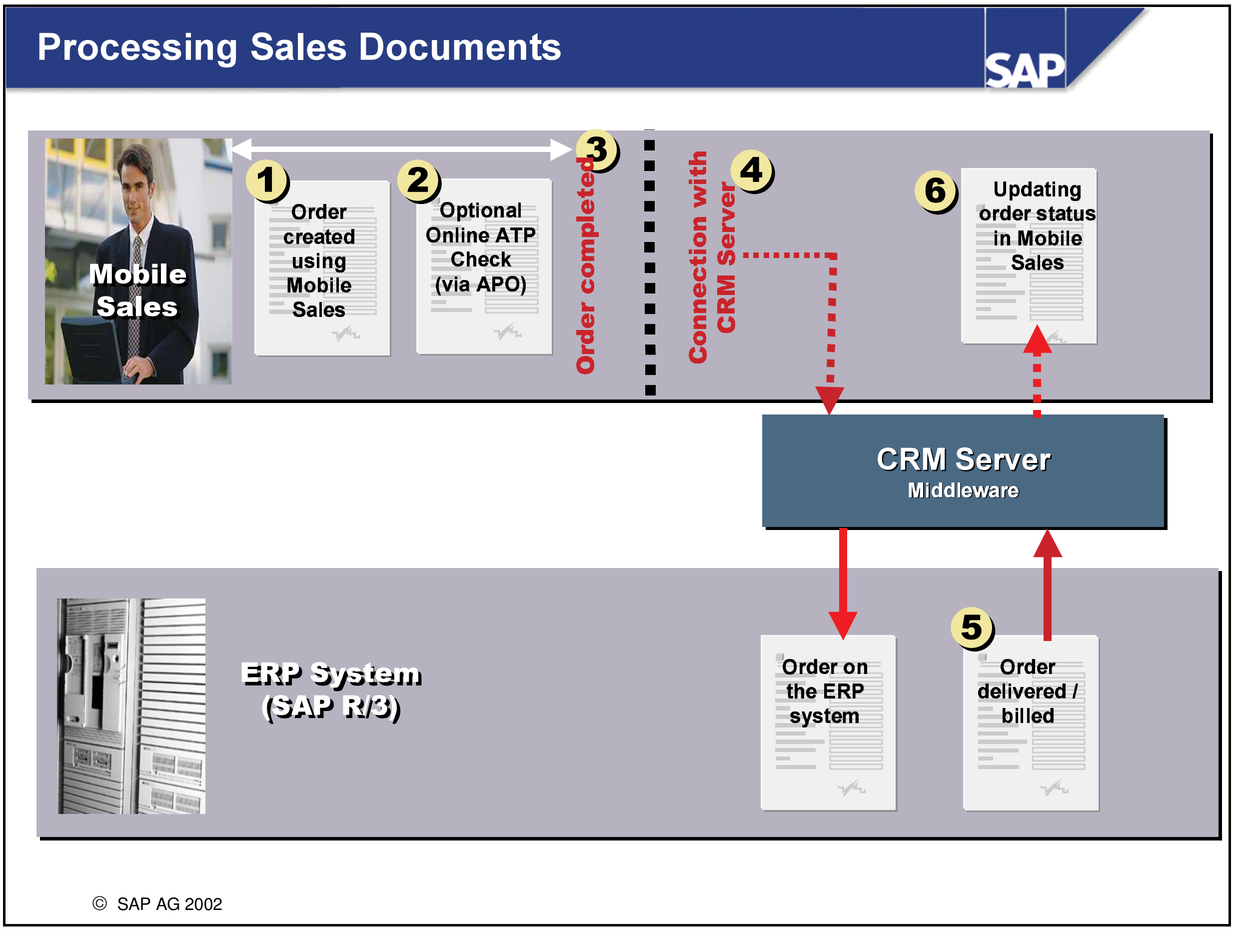
Application Interface



Features of Mobile Sales



- Activities & Calendar: Appointments and tasks can be viewed using an interactive calendar.
- Infocenter: Information that is distributed from a central point to field sales employees is accessible here (for example, internal company information).
- Campaigns: Sales campaigns can be triggered, executed, and tracked from here.
- Contracts: Monitoring and creating customer contracts.
- Pricing: Enables field sales employees to determine prices for products and services on the mobile client.
- Reports & Analyses: Data can be analyzed using Crystal Reports and SAP BW.

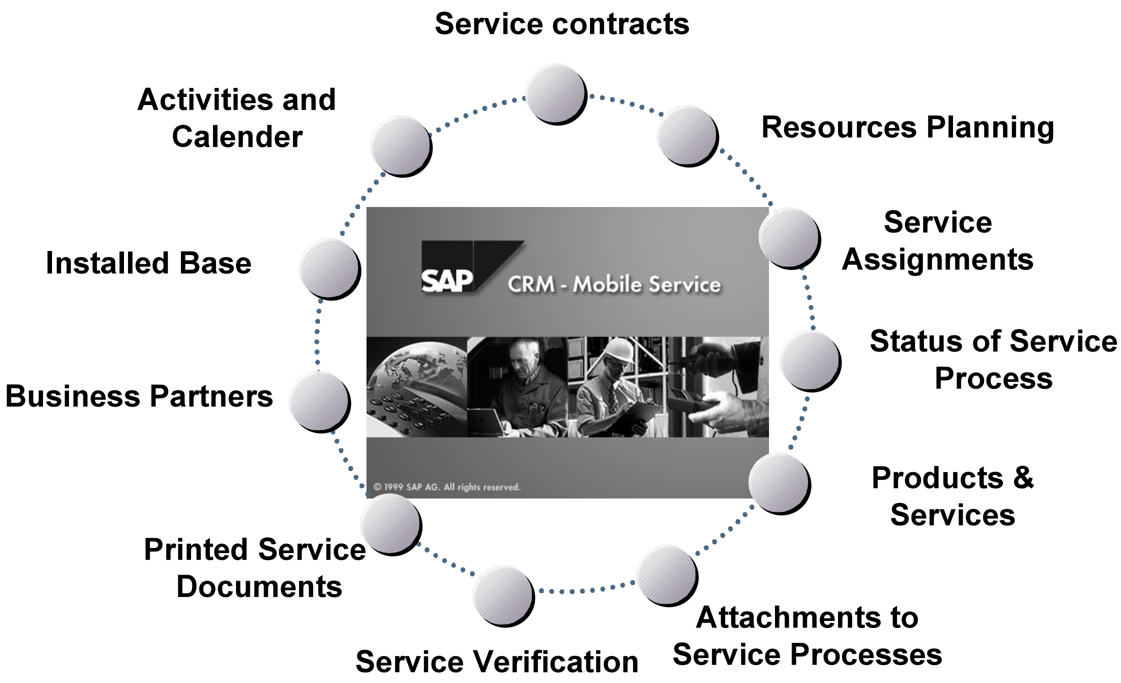


1. Order created using Mobile Sales
2. It is possible to run an online ATP check (availability check).

   The order can still be changed using Mobile Sales.
3. Order completion in Mobile Sales

   After this, the order can no longer be changed using Mobile Sales.
4. During the next exchange of data with the CRM server, the order is uploaded and transferred to an ERP system (for example, SAP R/3).
5. Further processing of the order within the sales process (delivery, billing) takes place on the level of the ERP system.
6. Changed order status is up-dated accordingly in Mobile Sales during data exchange. Thus, all information relating to the order is available to the field sales employee.

Features of Mobile Service



- Service Contracts: Provides a complete overview of all active service contracts with due emphasis on service profiles
- Resources Planning: Laptop entry of times when service employees are/ are not available enables detailed resources planning. This can be carried out using the resource planning tool on the mySAP CRM server
- Assigning Employees: Service employee assignments can be entered exactly
- Status of Service Process: Up-to-date progress status of service action
- Customer Equipment: Accommodates all field-service-relevant equipment information in electronic form

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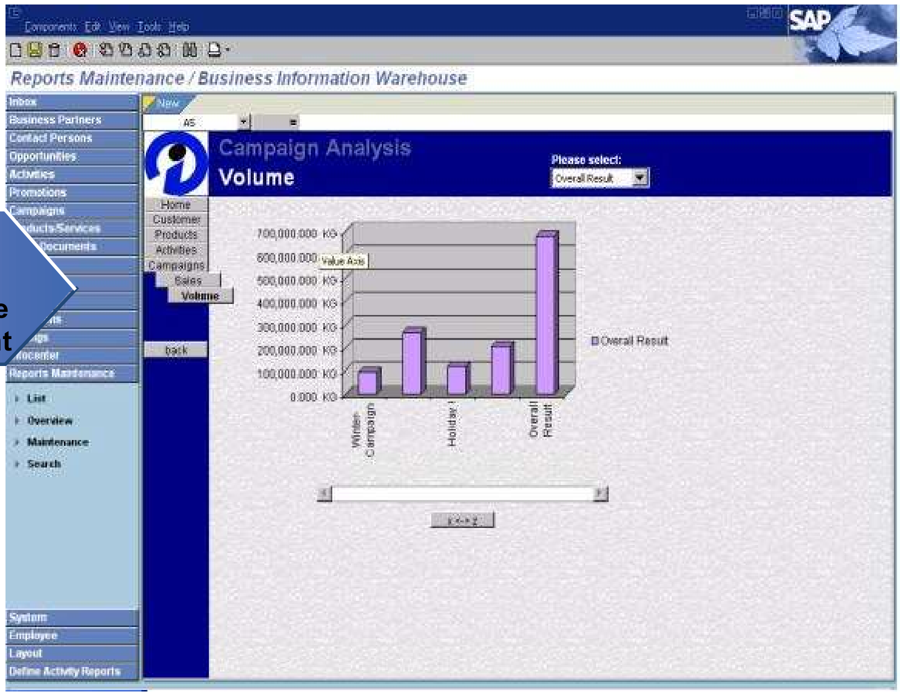
Information from BW Reports



Info. from BW reports available offline on mobile client

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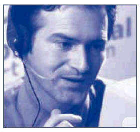
- Solution workbooks include reports generated in the SAP Business Information Warehouse (SAP BW) for offline use in Mobile Sales.
- The full scope of data in SAP BW is available for these reports, including Mobile Sales data as well as data from other sources (for example, R/3, external data providers, etc.) that might be important for sales analysis. Using SAP BW as a central reporting tool ensures that consistent statistical data is used for reporting across the entire sales force.
- The generation of solution workbooks is automated. This process is triggered and maintained in Mobile Sales middleware
- Solution workbooks are based on Microsoft Excel. They are fully integrated on the Mobile Sales interface.

Mobile Sales Business Scenario



Telesales

Customer: Electronic Media lease for monitors is up for renewal

Mail to Sales Employee

Receives notification of an activity that Electronic Media's Monitor lease is up

Sales Employee

Creates an opportunity in Mobile Sales

Update

Creates activity "Phone call" relating to opportunity

Update

Creates activity "Sales call" relating to opportunity

Order

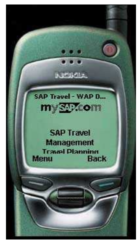
Creates an order relating to opportunity

Order

Order transferred to R/3 for processing

Mobile Business with Handhelds

- Sales Functionality
  - Business Partners
  - Activities
  - Opportunities
  - Order Management
- Service Functionality
  - Service Verification
  - Maintain Absence/ Attendance



- With CRM Handheld scenarios, sales employees always have up-to-date information on their sales cycle, their activities and business partners. Furthermore, they remain in touch with their contact partners and can make full use of sales chances that may materialize. This is made possible either through an online connection or in an offline modus using synchronization
- The CRM Handheld scenarios support two types of device:
  - Wireless Application Protocol (WAP) devices: WAP-compatible devices including mobile telephones that support WAP
  - Personal Digital Assistant (PDA) devices: for example, PocketPC and PalmPilot
- Due to the limited work area and the amount of data to be transferred, functionalities are limited (see slide)

CRM Mobile Client: Unit Summary

You are now able to:

- Describe the differences and uses of Mobile Sales and Mobile Service
- Describe the concept of opportunities in the CRM environment
- List the functions of Mobile Sales
- Describe the business process in Mobile Sales
- List the functions of Mobile Service
- Describe the business process in Mobile Service

Summary

Marketing | **Sales** | **Service**

Task

Customer

Relationship

Management

Contact Channels

Interaction Center

Internet

Mobile

Course Objectives (1)

You are now able to:

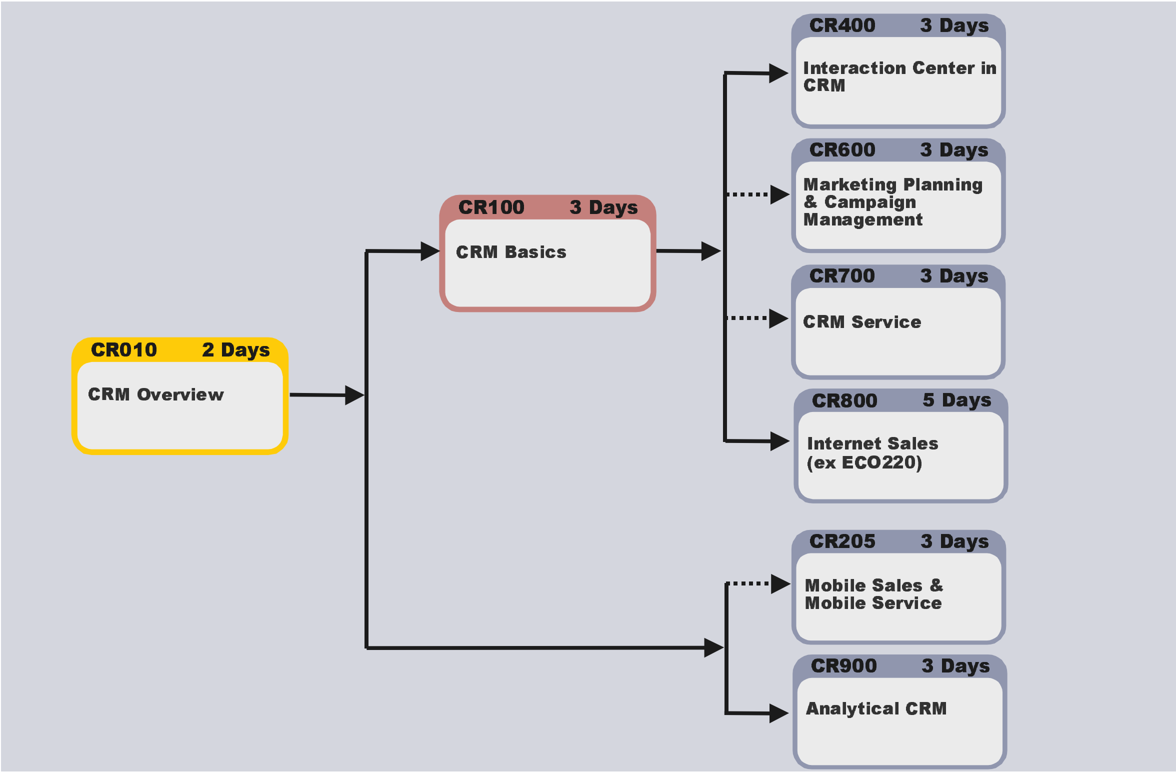
- Describe the SAP CRM product range
- Describe SAP CRM architecture
- Define basic CRM concepts
- Describe Marketing Planning and Campaign Management functionalities and create a basic marketing plan and campaign

Course Objectives (2)

You are now able to:

- Define and execute a process within Internet Sales
- Explain different Telesales and Teleservice processes and execute them in the Interaction Center
- Explain Mobile Sales and Mobile Service applications

mySAP CRM 1 Col22



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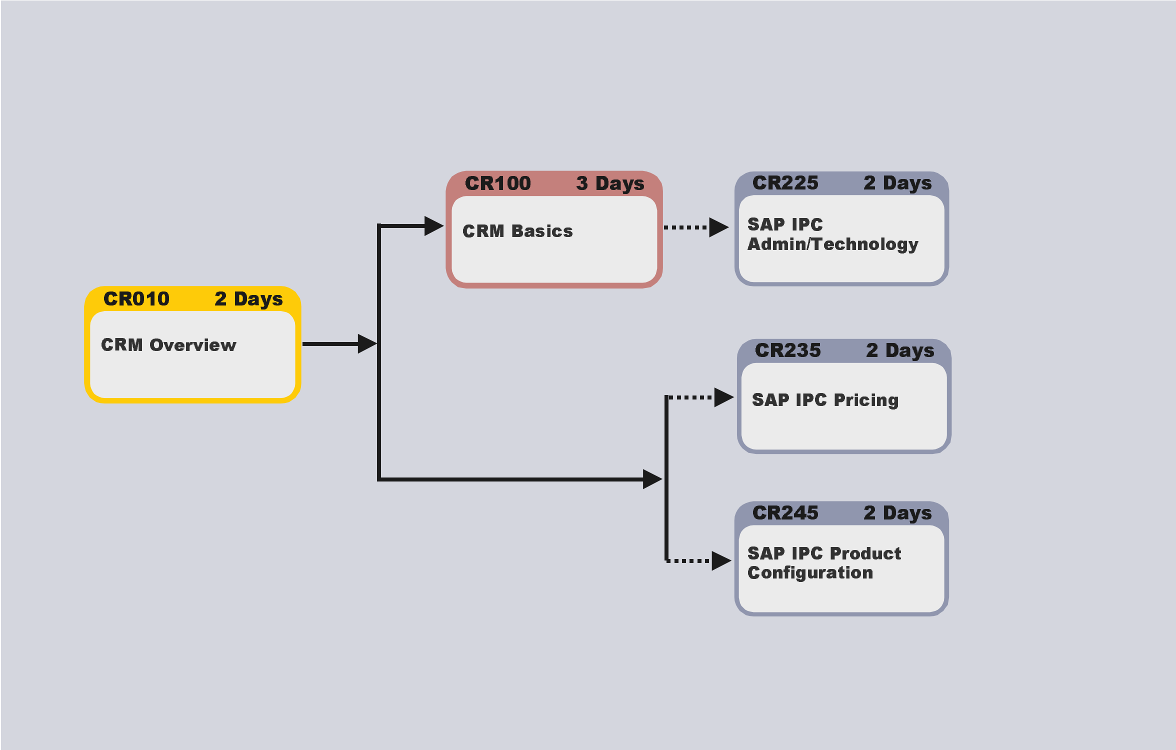

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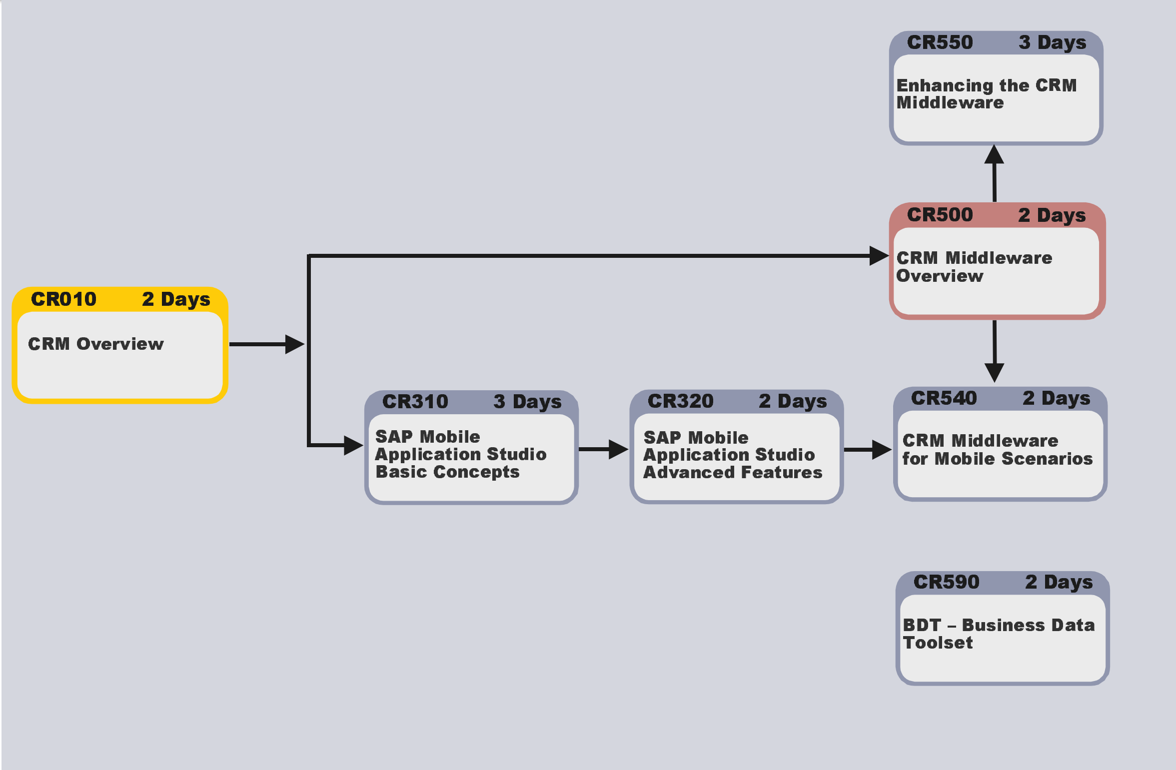


Appendix

Contents:

- Roles in mySAP CRM
- Best Practices
- CRM Organizational Model

Roles in CRM - Examples

Sales Roles

VP Sales
Sales Manager
Sales Representative
Field Sales Representative

Customer Service Roles

Customer Service Manager
Interaction Center Manager
Interaction Center Agent
Knowledge Engineer
Field Service Engineer

Marketing Roles

Marketing Manager
Marketing Analyst
Campaign Manager
Brand Manager

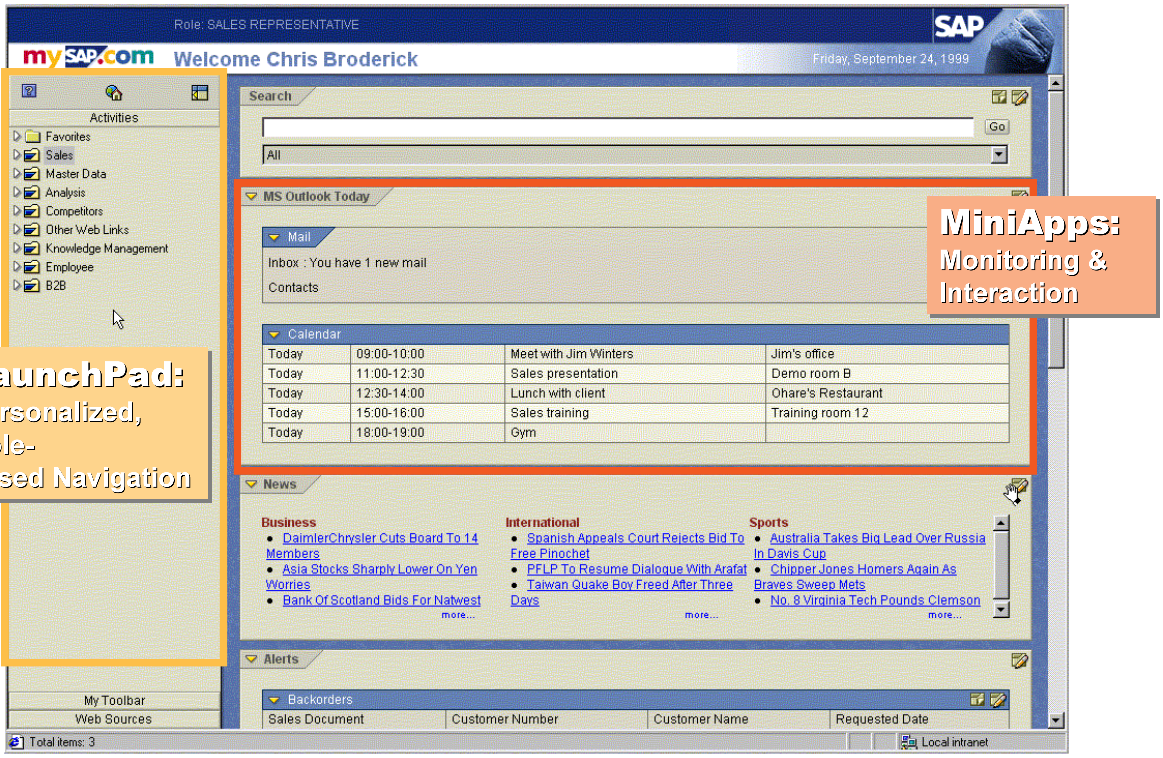
Internet Roles

Internet Customer (Service + Sales)
Web Shop Manager
Internet Sales Administrator

- CRM roles are examples of business content that is delivered with mySAP.com. This content can be used as a starting point, but can also be customized and adapted to individual business requirements

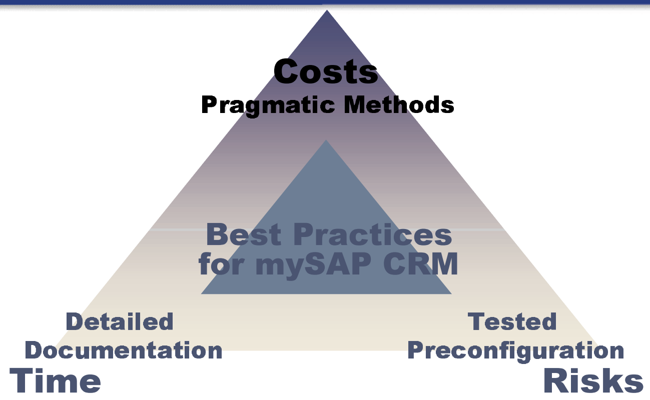
mySAP Enterprise Portal for Roles in CRM

Access to CRM and other applications in a browser environment



- Users perform certain roles in the company:
  - Interaction Center agent, sales rep., purchasing agent
  - One user can perform several roles
- Using standard Internet technology, the LaunchPad provides immediate, role-based access to:
  - mySAP business scenarios
  - Non-SAP components
  - The Internet
- SAP delivers 150+ role templates with the mySAP Enterprise Portal:
  - Easy to change and extend per role
  - Easy to extend per employee

Best Practices for mySAP CRM



Components

- Extensive **preconfiguration** for structuring a) the complete system landscape b) consistent business scenarios
- Detailed **documentation** of the preconfiguration and business processes
- Clear **methods** based on the principles of AccelaratedSAP

Scope

- Predefined business blueprints
- User documentation
- Predefined user roles
- Installation guide with automated steps
- Preconfiguration
- Training material
- Support for data migration
- Test catalog

- Three elements belong to the Best Practices for the mySAP CRM package:
- A clear method is based on the tested principles of AcceleratedSAP, that is, implementation in different phases. It includes many new accelerator documents that assist you when using ready-to-use packaged business know-how.
- Extensive, re-usable documentation for mySAP CRM solutions are available for self-training, and evaluation purposes, as well as for training project-employees and users.
- Complete preconfiguration puts everything you need for running "ready-to-use" integrated key processes at your disposal - with minimum installation effort. The complete preconfiguration is documented in detail, and adjustments to suit your requirements can be made quickly and easily.

Preconfigured CRM Business Scenarios

- Internet Sales
  - Order Process Business-to-Business
  - Order Process Business-to-Consumer
- Field Sales
  - Customer Visit and Order Entry
  - Campaign Execution
  - Mobile Opportunity
- Interaction Center
  - Information Help Desk
  - Service
  - Telesales Inbound
  - Telesales Outbound
- Marketing Management
  - Information Campaign
  - Media Campaign
  - Customer Acquisition with Lead Management
  - Customer Retention
- Integrated Sales Planning
  - Integrated Sales Planning for Key Accounts
- Service Provider

All system settings necessary for these scenarios are included as a reusable preconfiguration in Best Practices for mySAP CRM.

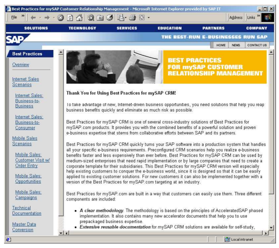
➔ This enables you to create a CRM prototype with minimum installation effort and in a short time

- Internet Sales: Best Practices offers you configuration data for the complete process chain of Internet-supported sales. The **Business-to-Business scenario** is aimed at sales to business partners. Customers log onto your Web shop using their user ID and password. Using this information, mySAP CRM can automatically determine the enterprise for which this customer works. Different business partners can be assigned different catalog views; it is possible to define which partners can view which products and at which price conditions. The **Business-to-Consumer scenario** includes everything you need to set up a Web shop, in which you can directly address end-consumers with your products. Customers can browse through your Web catalog and only need to log on with their user ID and password to buy a product. Customers buying for the first time can register online.
- **Mobile Sales:** Regardless where your field sales personnel may be, whether at the office or with a customer, they always have access to product and price information, configuration data, customer profiles, and order histories. The **Customer Visit with Order Entry** scenario covers all activities that your field sales personnel have to execute when taking an order during a customer visit. The **Mobile Campaigns** scenario supports your field sales personnel when organizing Web events, product launches and marketing campaigns. The **Mobile Opportunities** scenario helps your field sales employees to recognize sales possibilities at the earliest possible moment. Everything you require for organizing all necessary information (possible sales chance, who, when) is included in this scenario.
- In addition to these scenarios, Best Practices also includes preconfiguration for the following scenarios: Interaction Center, Marketing Management, and Integrated Sales Planning. Additionally, Best Practices still includes industry-specific scenarios for the area service provider.

Internal Use SAP Partner Only

Installation Procedure

- Prerequisites
  - Software for SAP CRM and SAP BW (if required for the mySAP.com solution) is installed
- Best Practices for the mySAP CRM complete package includes two components:
  - Documentation CD: This includes the documentation for business processes, complete technical documentation as well as all the documentation templates
  - Preconfiguration CD: This includes all elements (for example, Business Configuration Sets) that are required for the installation of Best Practices for mySAP CRM



GO **The Best Practices Add-on included on the preconfiguration CD is imported into the SAP CRM System**

- The prerequisite for using Best Practices for mySAP CRM is that the software for mySAP CRM is installed (as well as SAP BW and SAP APO, should this be required for the mySAP.com solution).
- Best Practices for the mySAP CRM complete package include two components:
  - Documentation CD: This includes the documentation for business processes, complete technical documentation, and all documentation templates.
  - Preconfiguration CD: This includes all elements (for example, business configuration sets) that are required for the installation of Best Practices for mySAP CRM.
- For the installation of Best Practices, it is first necessary to import the Best Practices Add-on into the mySAP CRM System.

CRM Organizational Model

Contents:

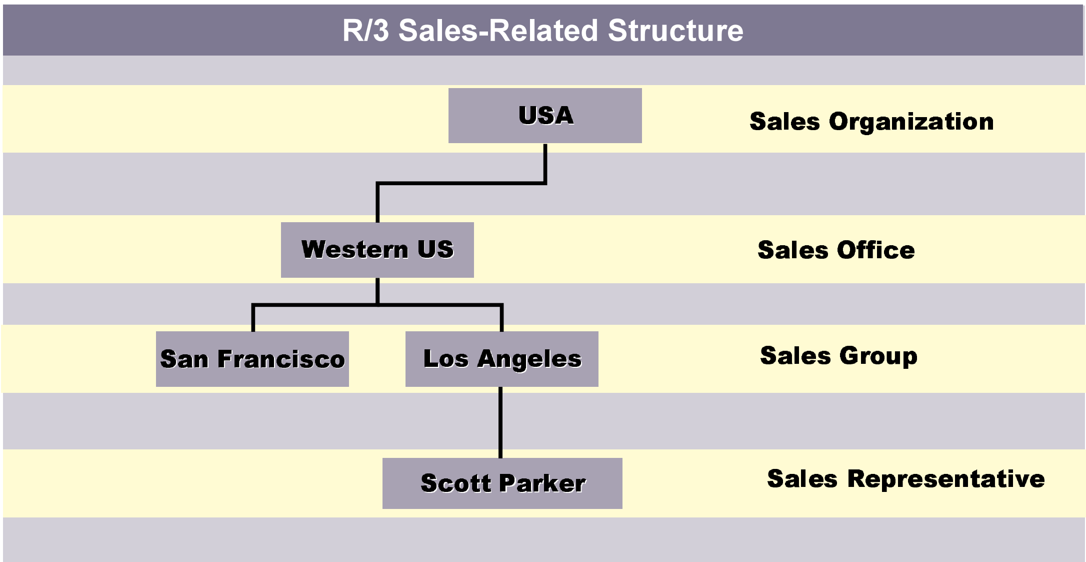
- CRM Organizational Model
- Differences between CRM and R/3
- Organizational Units, Positions, and Holders
- Business Attributes
- Organizational Data Determination

CRM Organizational Model: Unit Objectives

At the conclusion of this unit, you will be able to:

- **Describe the CRM organizational model**

Organization - R/3 Model



- In R/3, there are three traditional sales elements:
  1. Sales Office
  2. Sales Group
  3. Sales Representative
- These elements are limited in scope and structure and don't usually meet all the requirements of the sales organization.

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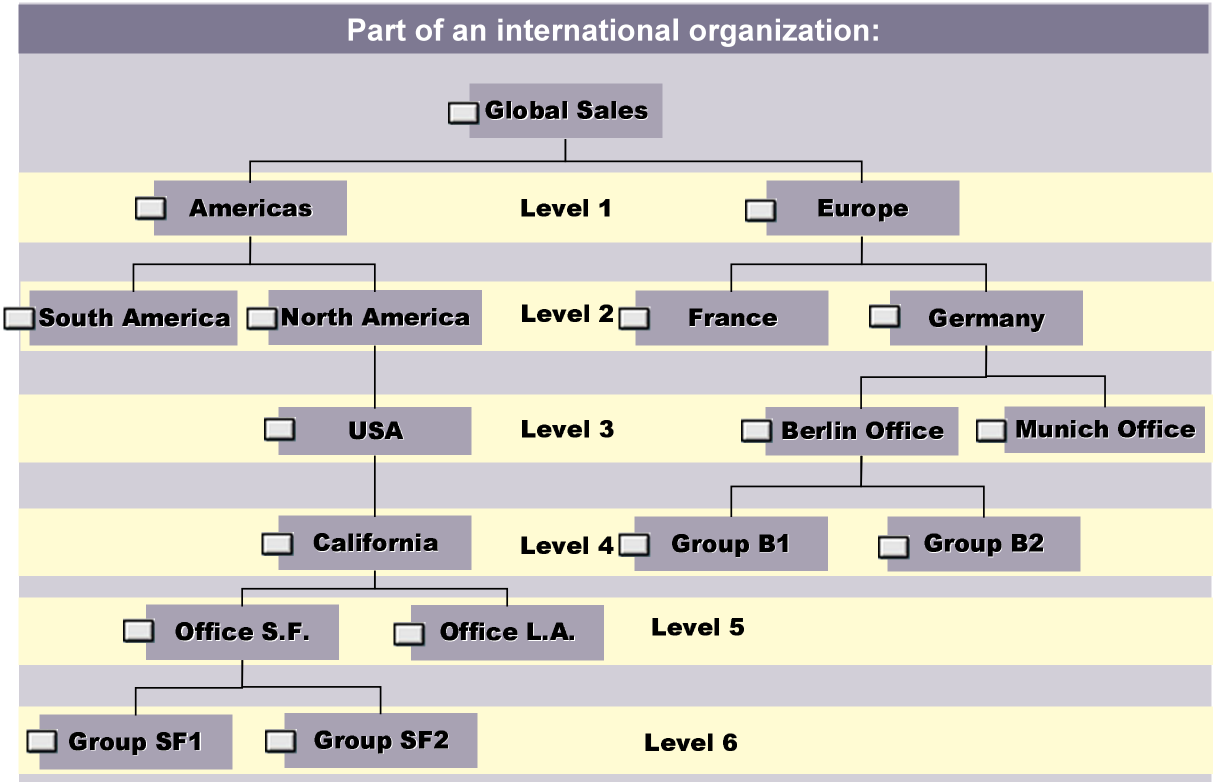
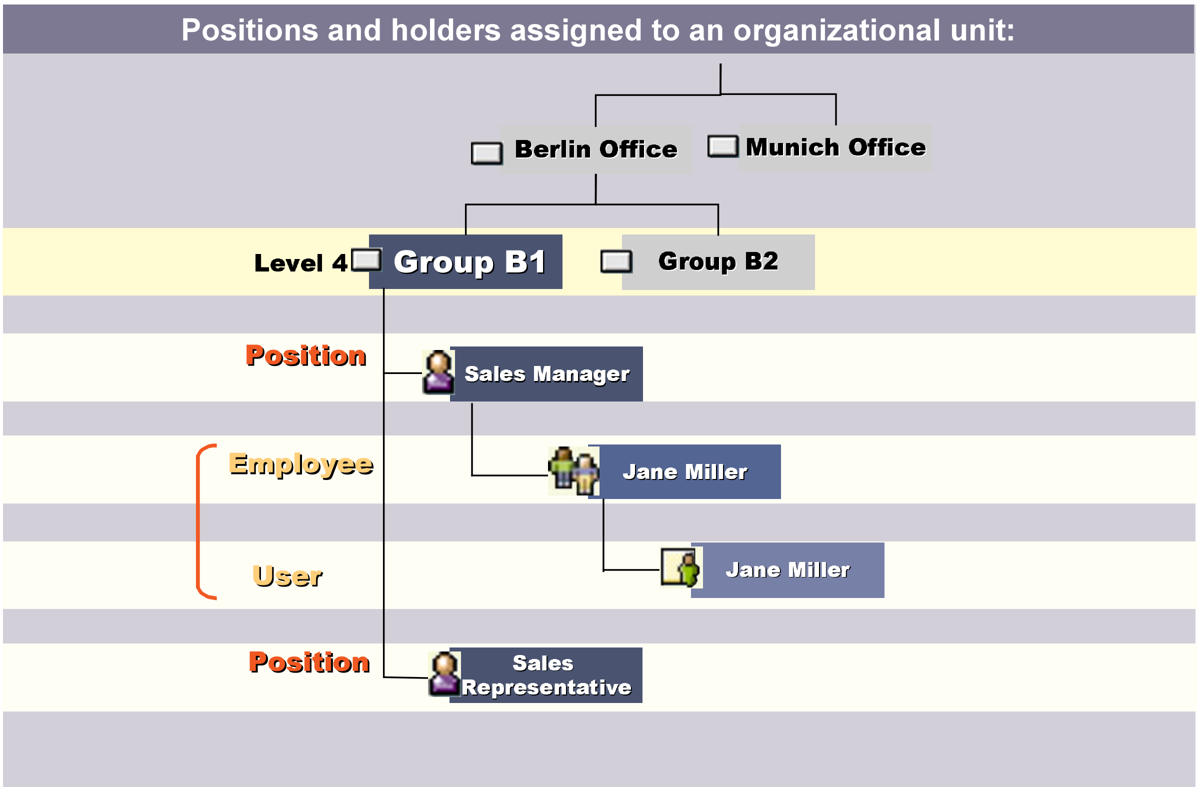
A Possible Organizational Structure in the CRM System



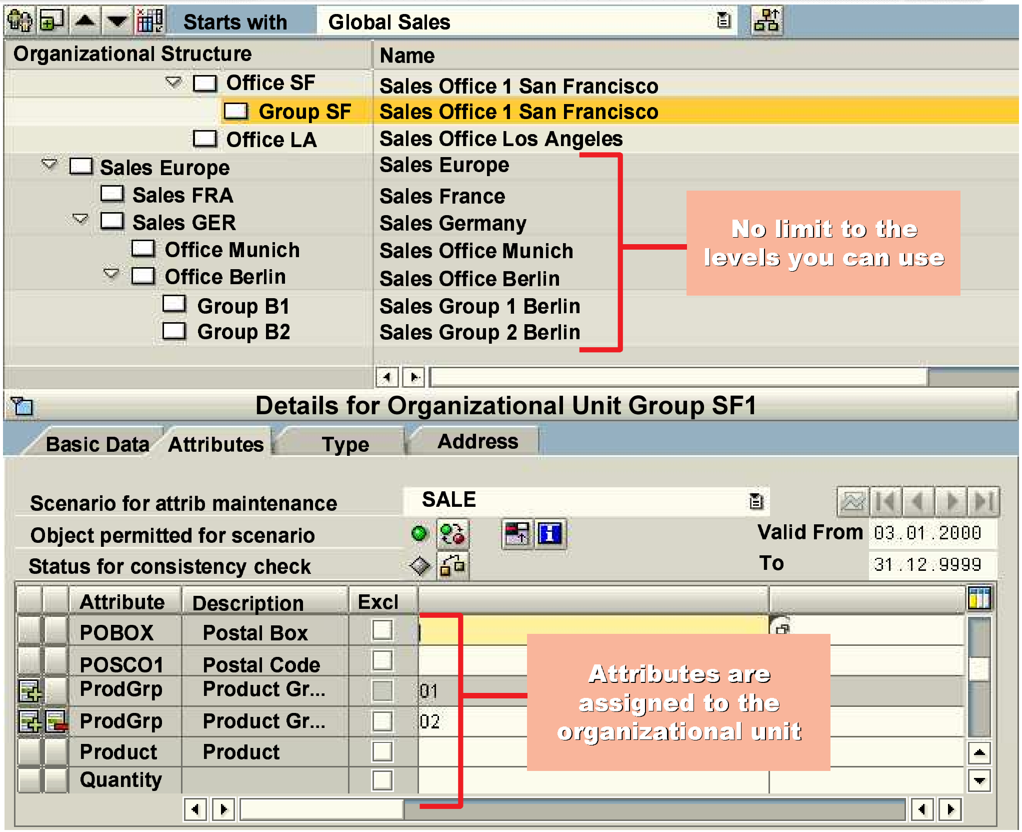
- The organizational structure has no limitations and can have as many levels as needed:
  - Americas: Six levels
  - Europe: Four levels
- Organizational units are easy to maintain, time-dependent, and adaptable to a variety of industries.
- The organizational structure can display both the sales and service areas of an organization.
- Organizational units can take the role of a business partner.
  - If a new organizational unit is created, the system automatically creates a business partner master record with the role organization unit.
  - The business partner number is displayed in the structure.
- **Validity of an organizational model**
  An enterprise's organizational plan is subject to continual change. For this reason, Organizational Management allows you to edit the organizational structure, staff assignments, and individual objects according to key dates and time periods.

Breaking Down an Organizational Unit

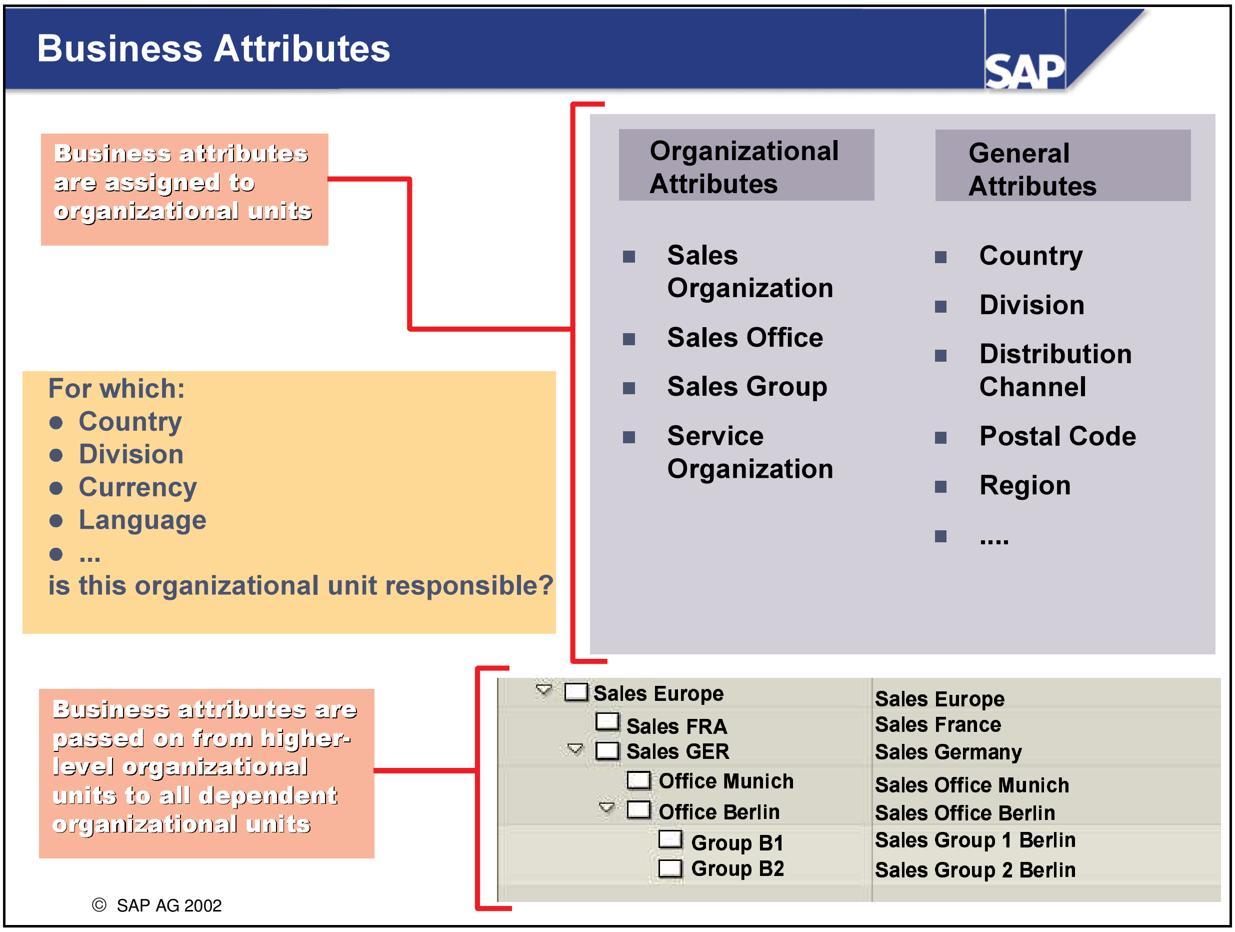


- **Organizational Unit**
  An organizational object (object type key O), which is used to form the basis of an organizational plan.
  Organizational units are functional units of an enterprise. Depending on how task distribution is organized in an enterprise, these can be, for example, departments, groups, or project teams.
- **Position**
  An organizational object (object type key S) which shows the functional task distribution of individual items and their reporting structure in the organizational plan. In CRM, positions could be, for example, sales manager, sales representative, Interaction Center manager or Interaction Center agent. Holders (employees or CRM users) can be assigned to one or more positions.
- **Employee / User**
  Employees and users are persons assigned to a position. A person can be a CRM business partner with the role **Employee** (object type key BP) or only a **CRM User** (object type key US) that is assigned to a position in an organizational plan. By assigning an employee or a user to a position, you can show where an employee is assigned organizationally in a company (what his function is). Assigning an employee is recommended because an employee master contains more business data than a user.

Organizational Structure and Attributes

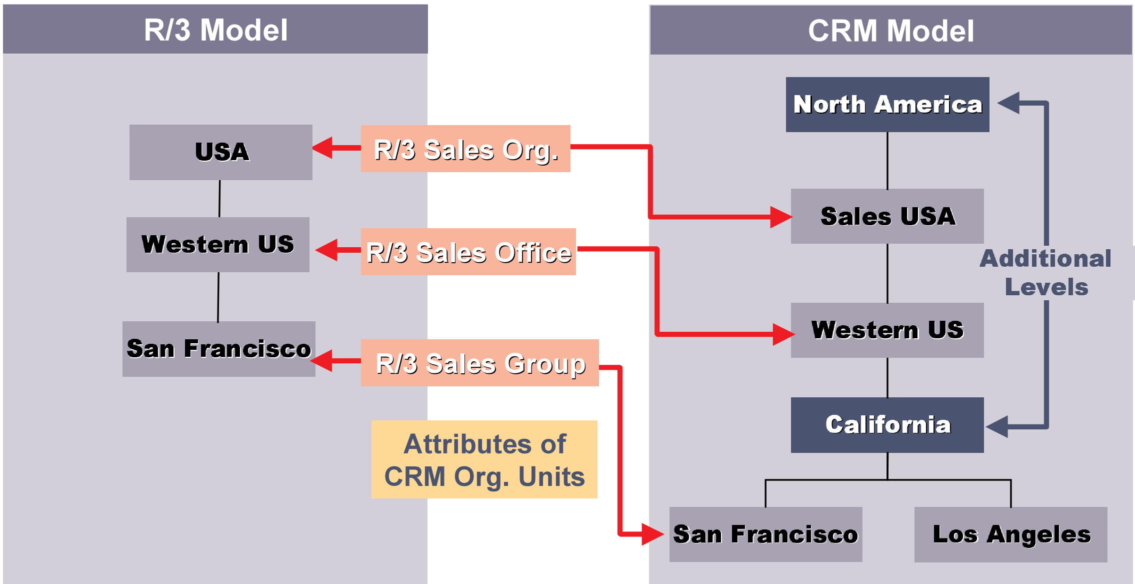


- Organizational units have general attributes that specify, for example, the responsibility of an organizational unit for a specific area.
- Attributes are used to determine the responsible organizational unit for processing a transaction.



- Attributes are specific data that you can assign to organizational units when creating your organizational structure.
- Attributes are always maintained for a specific scenario, which means you can maintain different attributes for each scenario.
- There are two kinds of attributes:
  - Organizational attributes indicate the **type** of an organizational unit.
  - General attributes define the **responsibilities** of an organizational unit.
- Business attributes are passed on from higher-level organizational units to all dependent organizational units.
- You cannot create attributes for positions and holders. Positions inherit the attributes of the higher-level organizational unit.

Mapping CRM Organizational Units to R/3 Sales Organization, Sales Office, Sales Group



- Organizational structure in CRM can be different from R/3
- Units used in R/3 can be displayed using attributes

- Organizational structures in CRM can be different from those in R/3.
- Units used in R/3 can be displayed.
- You can transfer organizational data, such as distribution channels, divisions, and sales areas, with the relevant text from R/3 into CRM.
- There is a report for automatically transferring the sales structure from R/3 into CRM. This function helps when installing the system. Using this report, you can select the R/3 sales areas (and offices and groups) that need to be transferred to CRM. After the download, the system creates a log that informs you of any errors.

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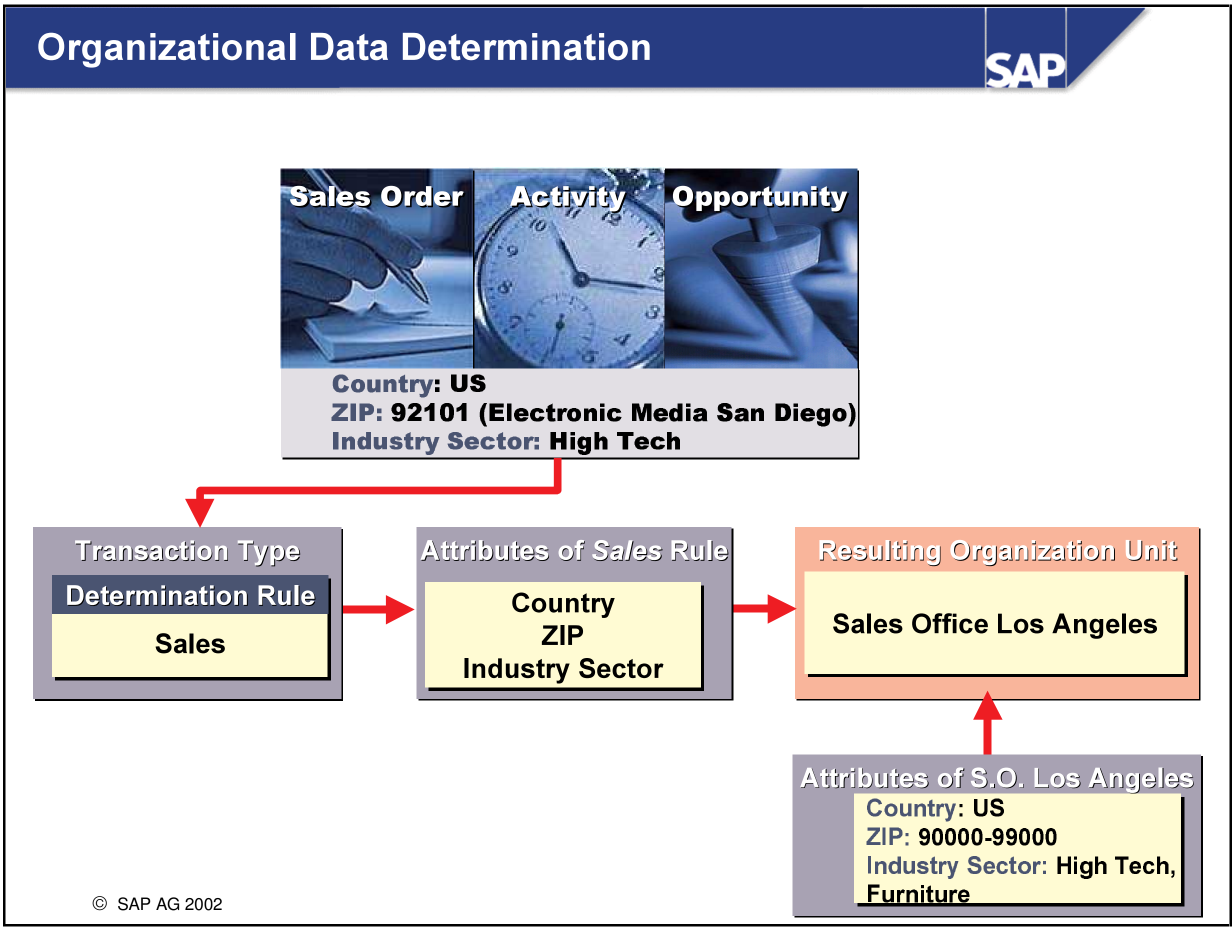

- Depending on the transaction type, certain organizational data is crucial for processing a business transaction. Thus the service organization responsible for processing a transaction is important for service orders. However, the distribution channel is just as important for customer orders as the responsible sales organization because pricing and delivery data can depend on it.
- The following options for determining organizational data in the document are available; these depend on the transaction type and can be set in Customizing:
  - **No determination:** In this case, enter the organizational data (for example, sales area) manually in the document.
  - **Automatic determination:** The system uses the data available in the document to determine relevant information, for example, the organizational data, postal code, country, or industry sector.
- Search criteria is defined using standard roles, for example, country, postal code, or product group.
- A standard role is assigned to a transaction type.
- Each transaction belongs to a transaction type.
- While responsibilities in R/3 are determined from the sales area-related data from the customer master, CRM responsibilities are defined independently from the business partner master and are determined, if required, from the organizational structure.
  The organizational model and determination rules should be customized to meet the requirements of the enterprise so that wherever possible, exactly ONE organizational unit is determined. In case of multiple matching organizational units, a pop-up with possible choices will appear.

CRM Organizational Model: Unit Summary

You are now able to:

- **Describe the CRM organizational model**

Exercises

Unit: CRM Organizational Model

At the conclusion of this exercise, you will be able to:

- Describe the object types and maintenance of an organizational structure in CRM
- Explain the purpose of attributes
- Describe the mapping of organizational objects in CRM to objects in R/3

Your organization has already created an organizational structure. As an employee in the Interaction Center, you should check some details of this structure.

1-1 Which advantages does the CRM organizational model have in fulfilling your requirements?

1-2 Which three object types exist in an organizational structure in CRM?

Internal Use SAP Partner Only

1-3 You work as an Interaction Center agent in the Interaction Center in Chicago, which belongs to the organizational unit **US Sales East**.

1-3-1 To which object type does the organizational unit **US Sales East** belong?

____

1-3-2 Does a business partner master record exist for the organizational unit **US Sales East**?

____

1-3-3 For which country and distribution channels is **US Sales East** responsible?

____

____

1-3-4 Are these attributes maintained directly at **US Sales East**?

____

1-3-5 **US Sales East** is permitted as an organizational unit for the sales scenario. Is it also permitted for the service scenario?

____

1-3-6 To which organizational unit is **US Office Chicago** assigned in R/3?

____

1-4 Which options are possible for determining the responsible organizational data in business transactions in CRM?

____

Solutions

Unit: CRM Organizational Model

1-1 Which advantages does the CRM organizational model have in fulfilling your requirements?

Advantages of the CRM organizational model:

- There is no limit to the number of levels you can use in the structure.
- You can use the organizational model in the CRM System to maintain your company structure for different scenarios (Sales, Service and Business-to-Business Procurement).
- Maintenance of organizational units can be time-dependent. In this way, you can schedule future organizational changes.
- You can adapt and extend the organizational model in CRM.
- Organizational units can take the role of a business partner.

1-2 Which three object types exist in an organizational structure in CRM?

Object types of an organizational structure in CRM:

- Organizational unit: object type key O
- Position: object type key S
- Holder: Employee (object type key CP) or user (object type key US)

1-3 You are working as an Interaction Center agent in the Interaction Center in Chicago, which belongs to **US Sales East**.

1-3-1 To which object type does the organizational unit **US Sales East** belong?

User Menu→ Master Data → Organizational Model → Maintain Organizational Model

Select *Search term* and enter **SALES US** in the *With name* field.
Select *Find* and then enter **US Sales & Service.**

US Sales East belongs to the organizational unit object type. You recognize this from the object type key O in column **Id**.

1-3-2 Does a business partner master record exist for the organizational unit **US Sales East**?

If a new organizational unit is entered, the system automatically creates a business partner master record.
In the business partner column, you can identify the number of the business partner master record of the corresponding organizational unit.
Business partner master record 232 exists for **US Sales East.**

1-3-3 For which country and distribution channels is **US Sales East** responsible?

Attribute for **US Sales East**: sales

Select **US Sales East** and go to the *Attributes* tab page in the detail screen for the organizational unit **US Sales East**.
In the *Attribute maintenance scenario* field, select: **Sales.**
Country key: **US**
Distribution channels: **10, 12, 14, 30**

1-3-4 Are these attributes maintained directly at **US Sales East**?

No, these attributes are inherited from the organizational unit **US Sales & Service.**

1-3-5 **US Sales East** is permitted as an organizational unit for the sales scenario. Is it also permitted for the service scenario?

To check this, go to the *Type* tab page in the detail screen for the organizational unit **US Sales East** and select *Service* in the *Attribute maintenance scenario* field.
The object **US Sales East** is not permitted for the **Service** scenario.

1-3-6 To which organizational unit is **US Office Chicago** assigned in R/3?

Select **US Office Chicago** and go to the *Type* tab page. Select **sales** in the *Attribute maintenance scenario* field.
You see that the US Office Chicago is flagged as a sales office in the CRM organizational model and assigned to sales office **3010** in R/3.

1-4 Which options are possible for determining the required organizational data in a business transaction in CRM?

The following options are available for determining organizational data in business transactions:

1. **Automatic determination**:
   The system uses data from activity documents in order, for example to determine the business partner number, region, product, or organizational data.
2. **No determination**:
   In this case, enter the organizational data (for example sales area) manually in the document.