

SDN Contribution

## Beginners guide to CRM Interaction Center (IC) Winclient setup

## Applies to:

SAP CRM 4.0 and higher

## Summary

The Interaction Center forms the foundation for collaboration and Communication. This component of SAP CRM solution provides an integrated and scalable workplace for processing inbound and outbound contacts.

During the installation and configuration of the Interaction Center, you need to determine the layout of the agent, agent group, or entire call center.

In this tutorial we will discuss the steps to undertake necessary customization, configuration and tailoring tasks to implement the CRM Interaction center (WinClient). SAP provides many standard profiles which can be customized. In this tutorial we will copy and customize SAL\_TELE profile.

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## Author Bio



Jabeen Banu has been in the IT Industry since 1998, primarily working on SAP. Apart from the normal ABAP stuff, she has expertise in CRM. She has worked with Organizations such as SAP Labs, Digital and Compaq. Currently she is with Intelligroup Asia and has been working there since 2003.

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## 1 CRM Interaction Center

The Interaction Center forms the foundation for collaboration and Communication. This component of SAP CRM solution provides an integrated and scalable workplace for processing inbound and outbound contacts. It is also the central instrument for opening up all customer communication channels.

### 1.1 Features of CRM Interaction Center

#### Multi channel access

- Telephony capabilities: Phone, email, Chat, Voice over IP, web browsing, fax

#### Primary business scenarios

- Telemarketing
- Telesales
- Customer Service
- Analytics
- Supporting Processes

#### Integration with logistics and financials

Leverage existing legacy systems (SAP & non-SAP) to check availability to promise and customer invoices

## 1.2 Business Scenarios

### Customer Service

- Handle complaints
- Schedule service calls
- Answer technical questions
- Assist with returns

### Telesales

- Provide product information
- Provide quotes
- Close deals
- Selling of products & services
- Create product proposals

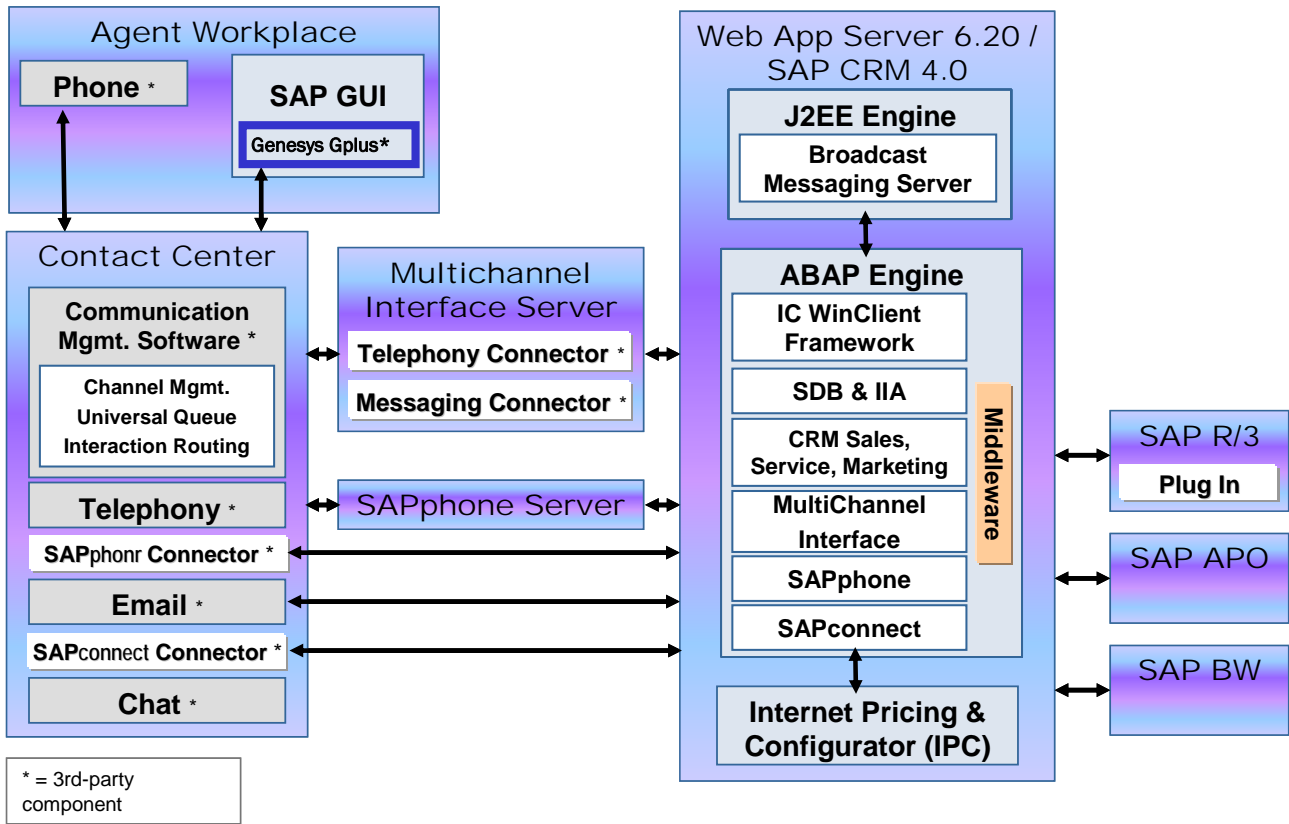
### Telemarketing

- Call list creation and assignment
- Campaign execution
- Lead qualification
- Outbound dialing integration
- Prospect contact management

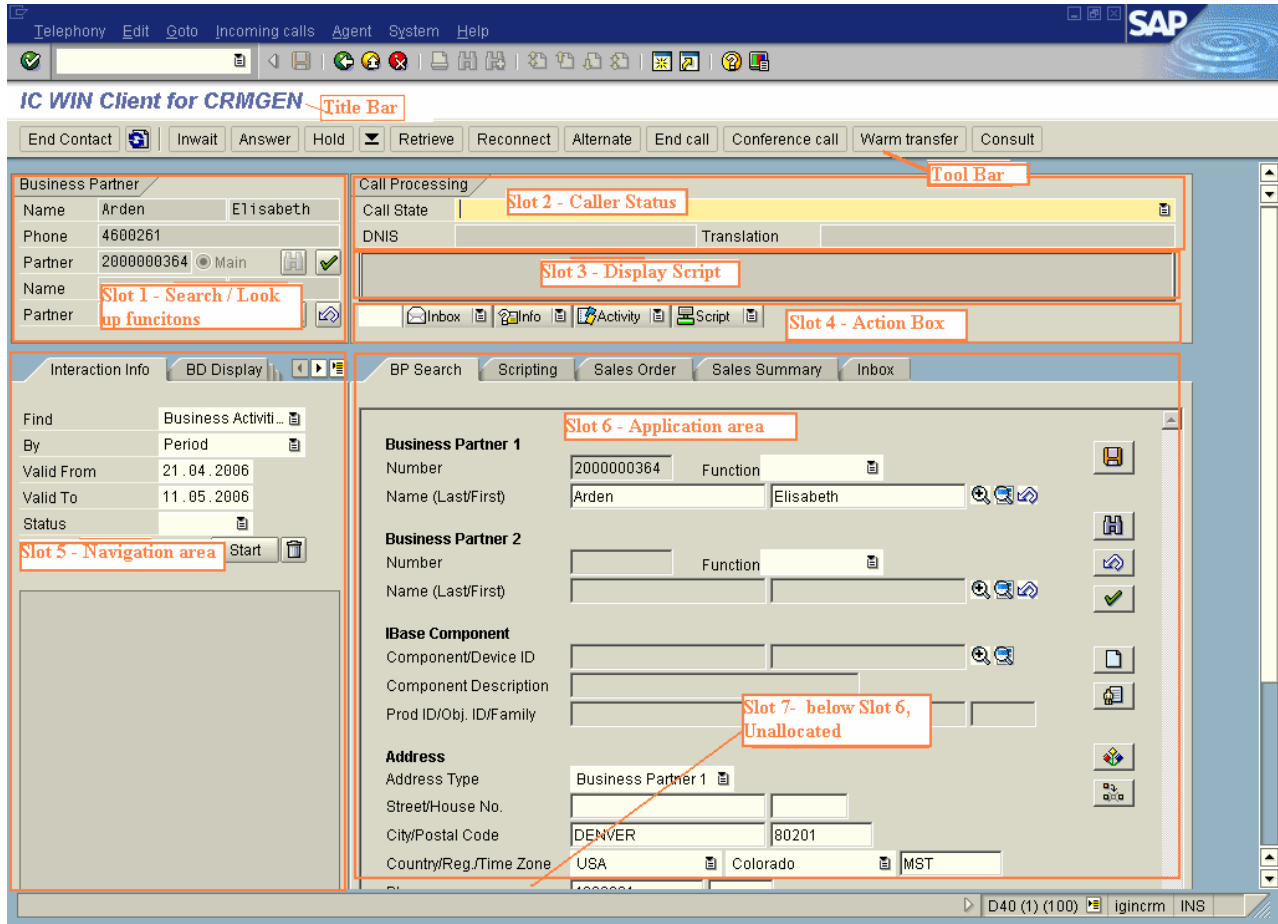
### Supporting Processes

- Workforce management
- Alerts and messages
- Workflow management
- Knowledge management
- Scripts and surveys
- CTI (Call Telephony Integration)

## 2 CRM IC Win client Architecture



### 3 Layout: IC WinClient Components



The layout of Win IC screen can contain up to 7 slots. These slots can be configured to place required components as shown above. You can rearrange these components amongst the slots, and add/remove the components.

There are 3 possible screen frameworks, in which you can arrange these slots,

- L-shaped with call state
- L-shaped without call state
- Vertical

The layout above is arranged in L-shaped with call state. L-shaped without call state is same as L-shaped with call state except that the 'Call State' component will be moved to bottom of the screen layout.

Incase of Vertical, all the slots are arranged one after the other in one column.

The entire layout is managed with 2 main components - **Framework** and the **Profile**.

Framework allows us to design the layout by placing the slots in required manner and assigning the components to these slots. Framework contains both Visible and Hidden Components.

There will one main Profile to which the Framework is attached. This main Profile will in turn contain Profile Attributes/Profile Categories. All the Profile Categories in this list will appear as components (defined in the Framework) in the IC WinClient with the profiles listed. So these Profile Categories gives us more customization options to select various profiles for each of the components defined in the Framework.

## 4 Launching IC Winclient

The logged in user can launch the Interaction center from transaction /nCIC0 from easy access menu Interaction Center → Interaction Center WinClient →CIC0 - Interaction Center WinClient

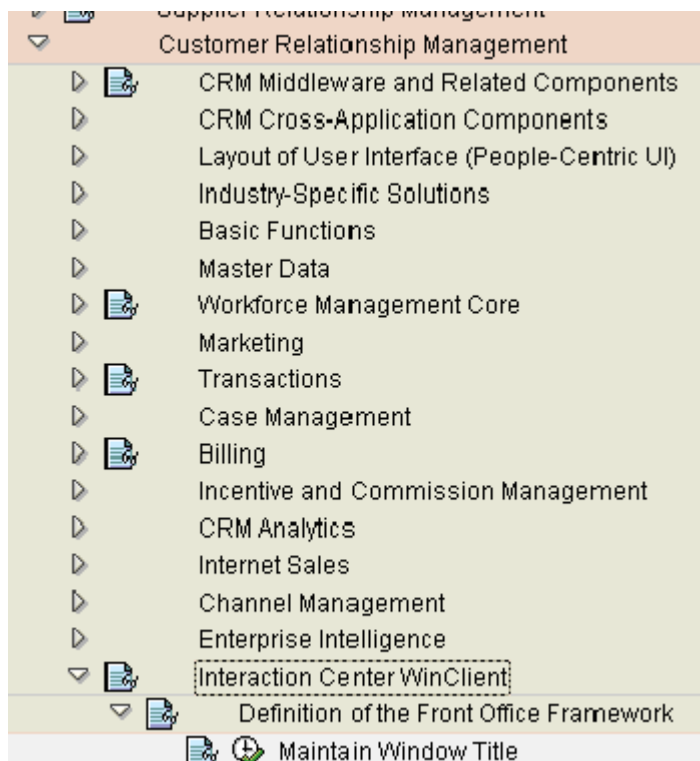
In call center from Menu Agent → Frame Status, you can see all the visible and hidden components. It also displays the Customer Interaction Center Profile attached to the Frame Work.

## 5 CIC front office Framework configuration

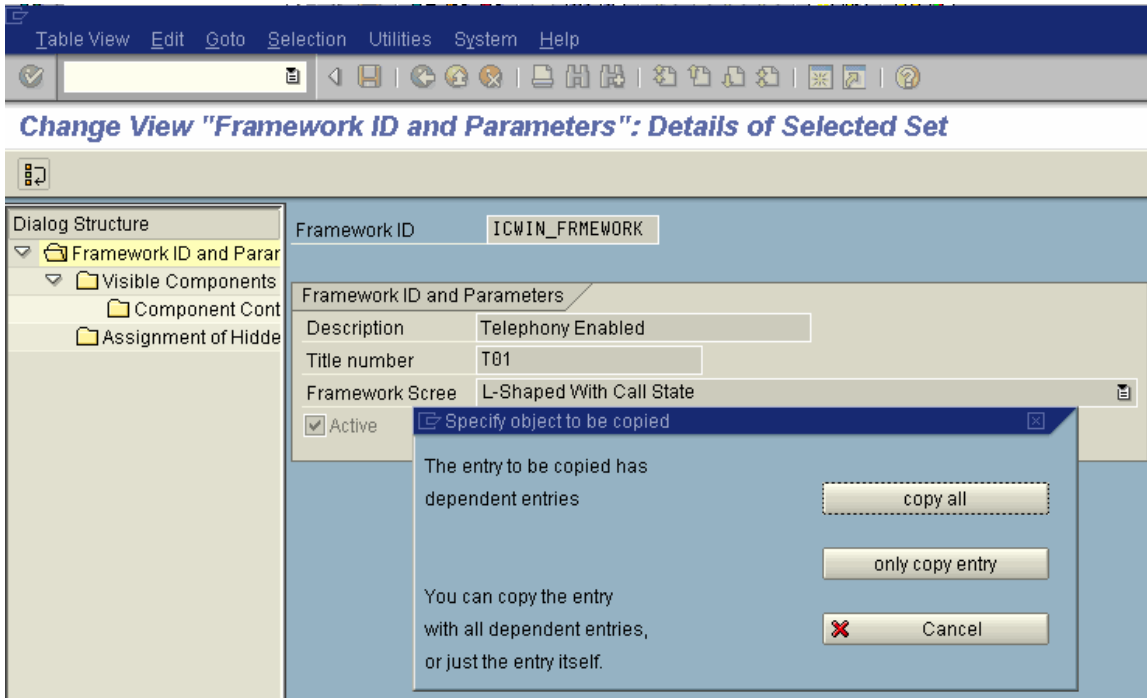
The Framework ID is the identifier of a Framework, the set of hidden and visible components to execute in the Interaction Center (IC) WinClient Front Office.

The following steps will assist you in customizing the agents or agent groups Call center layout.

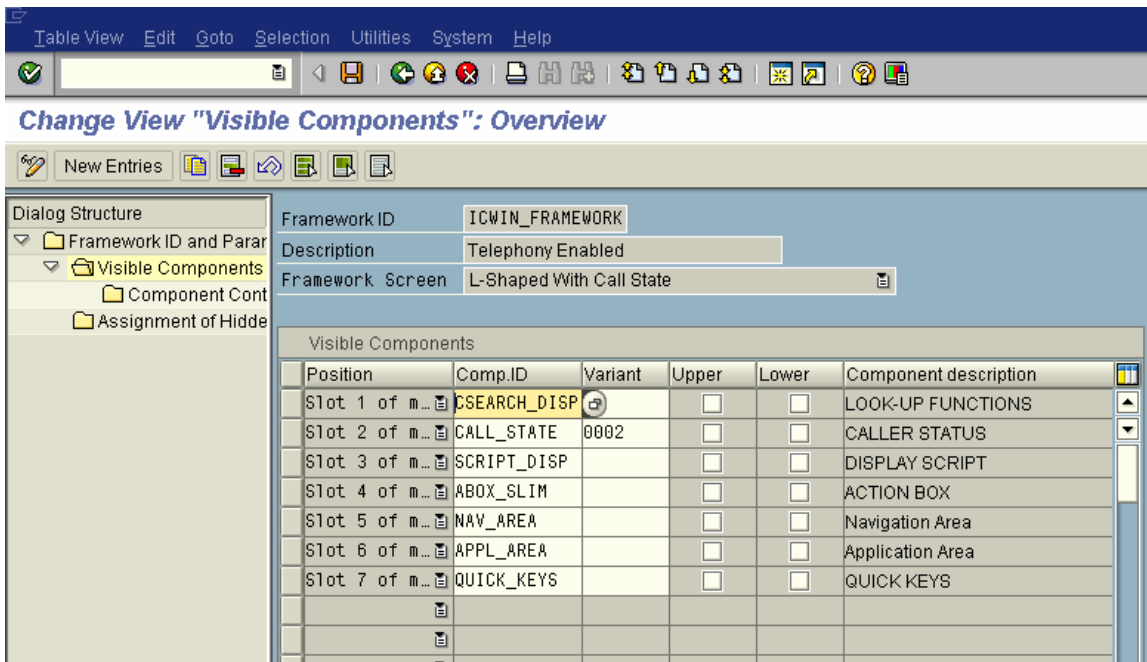
- This configuration is done from SPRO → Customer Relationship Management→ Interaction Center Winclient→ Definition of Front Office Framework → Define Framework ID and Parameters



- Select suitable SAP delivered profile (Eg, 'TELEPHONY' ) and copy all the Visible and Hidden Components to 'ICWIN\_Frmework'



- You can go through the details of Visible and Hidden Components, the Column 'Variant' describes how many lines each slot occupies on the screen (eg: 1line, 2 lines or 3 lines). Column 'Comp. ID' allows you to position the components on the screen.



- Save the Framework to a change request



## 5.1 CIC Profile Definition

The IC WinClient profile is collective profiles where you group all the hidden and visible components you want to use in the IC WinClient. For each of these components you can again select a profile.

This configuration is done from SPRO → Customer Relationship Management → Interaction Center Winclient → Define IC Win client Profile



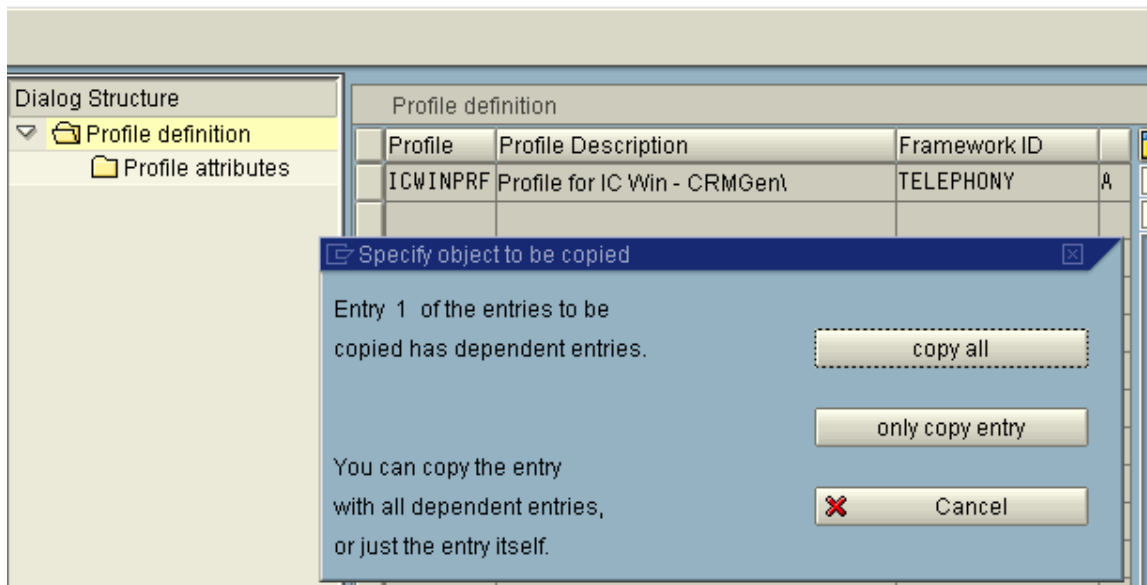
- Select Sales Telephony Profile – SAL\_TEL rename it to 'ICWINPRO', change the profile description as needed and copy all the components.

### Change View "Profile definition": Overview

The screenshot shows the 'Profile definition' table in the SAP SPRO system. The table has four columns: 'Profile', 'Profile Description', 'Framework ID', and a small icon column. The 'SAL\_TEL' profile is highlighted in orange. The table contains the following data:

Profile	Profile Description	Framework ID	
ISAM_P02	IS-Automotive Wide Veh. Loc.	ISAM_FRM01	A
ISHT_P01	IS-High Tech Entitlement Loc.	NON-TELEPHONY	A
ISM0001	IS-Media	NON-TELEPHONY	A
PR_NIBX	Default Profile with Ext.Inbox	NON-TELEPHONY	A
SAL_NTEL	Default Sales Non-Telephony	NON-TELEPHONY	A
<b>SAL_TEL</b>	<b>Default Sales Telephony</b>	<b>TELEPHONY</b>	<b>A</b>
SBLN_TEL	Survey Blended Telephony	TELEPHONY	A

## Change View "Profile definition": Overview of Selected Set

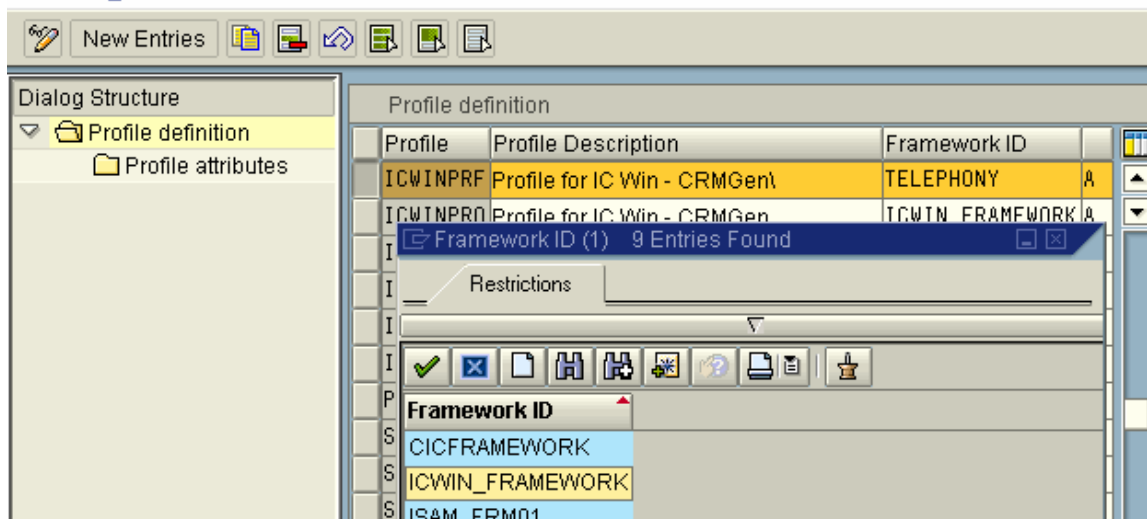


- Save the Profile to a change request.

### 5.2 Linking CIC Profile to Framework

- Change the Profile you just copied in the above step.
- Link the CIC Framework you created earlier to this profile by replacing the 'Framework ID' to 'ICWIN\_FRMEWORK'.

## Change View "Profile definition": Overview

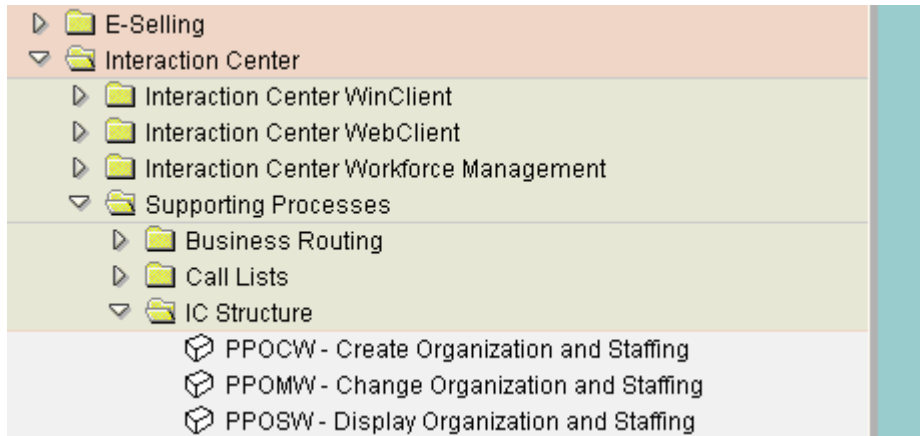


- Save the Profile changes.

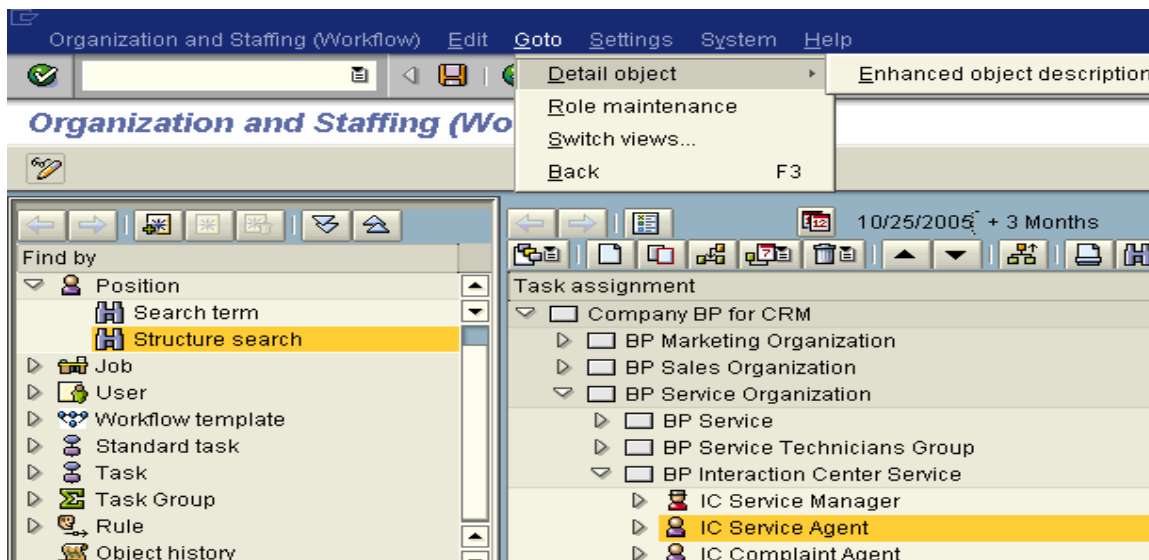
## 6 Organizational Management set up

The IC profile should be assigned to an agent, agent groups or organizations in the Organization Structure at Organization Unit or Position level. By this you can group the agents by roles, skills or work area. Specifying an IC profile on a higher organizational level is recommended as it saves you from assigning an IC profile to each and every agent

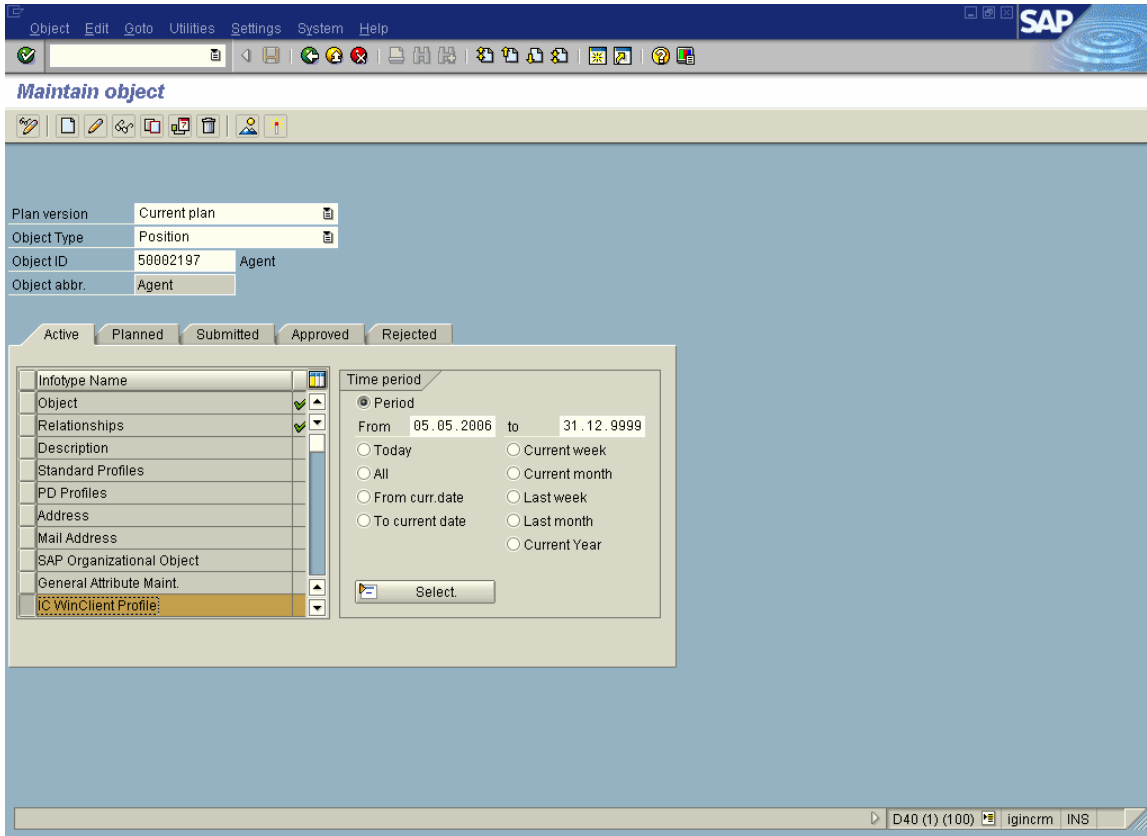
- Change an Org unit/Position from transaction PPOMW or from Easy Access Path – Interaction Center → Supporting Processes → IC Structure → Change Organization and Staffing



- Select the desired position within the Organizational Model and then navigate to, Menu Goto → Detail object → Enhanced object description

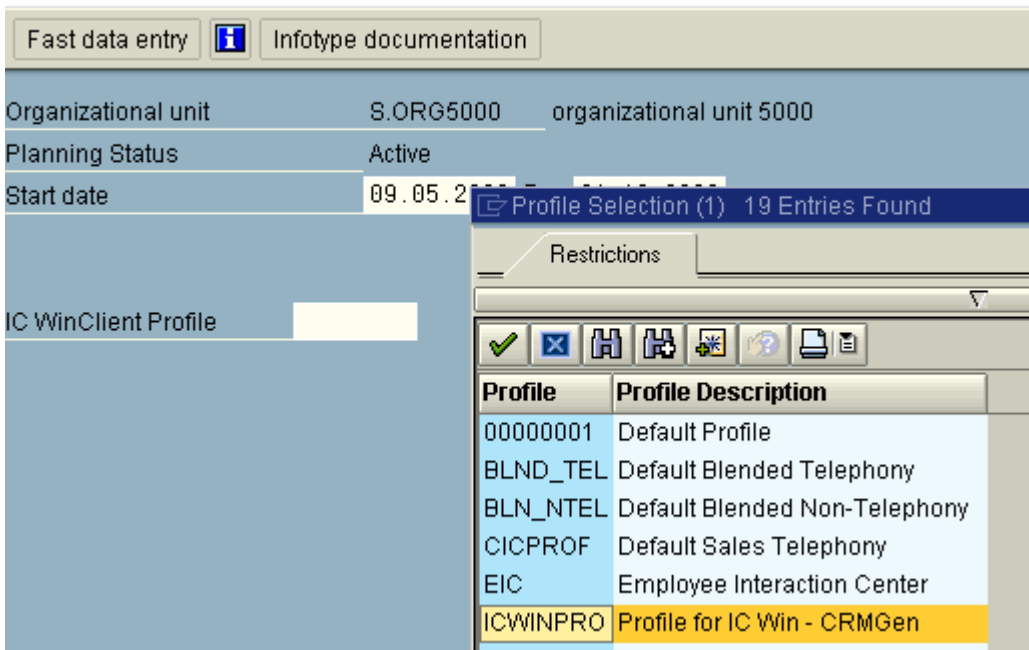


- Select the infotype corresponding to the WinClient Profile and then use the button to create the infotype



- Select the WinClient Profile 'ICWINPRO' you had created from the drop down list and then Save

### Create IC WinClient Profile

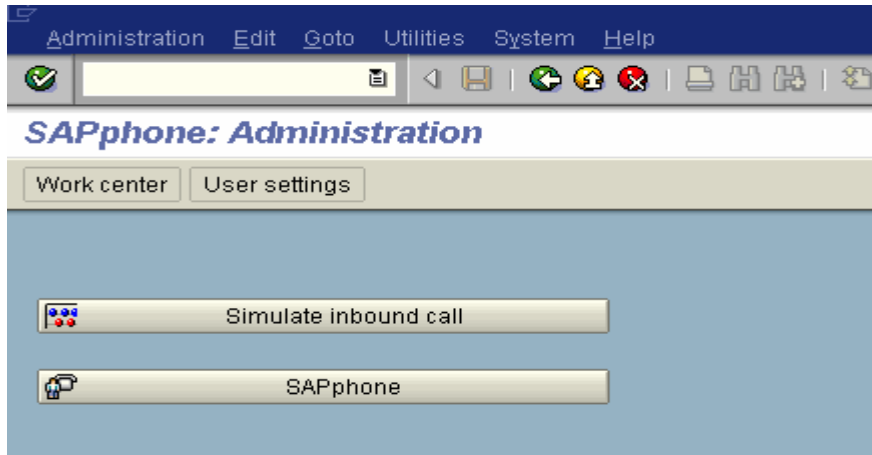




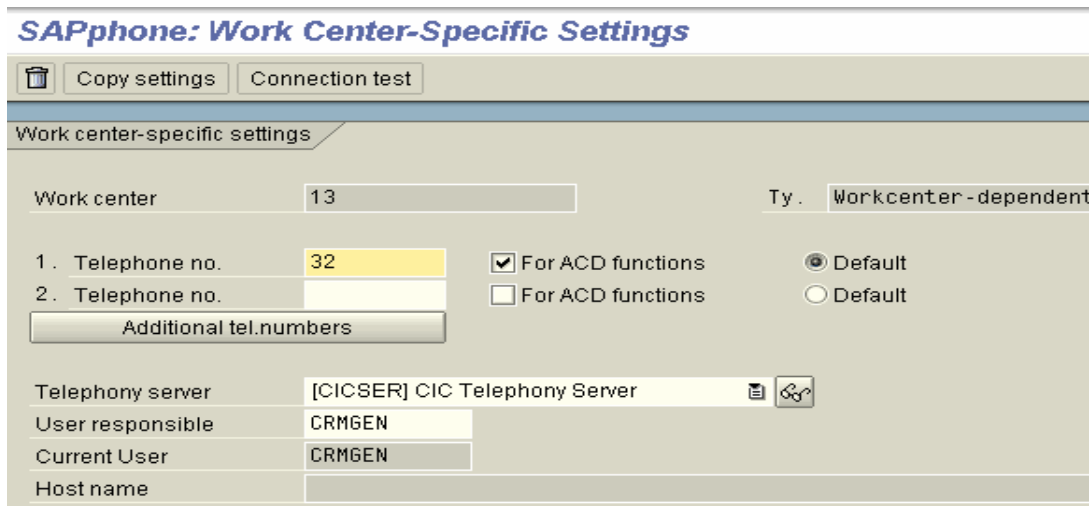
Check the CIC Profile assignment to agent from transaction CRMM\_CIC\_APDISPLAY

## 7 Telephony Settings

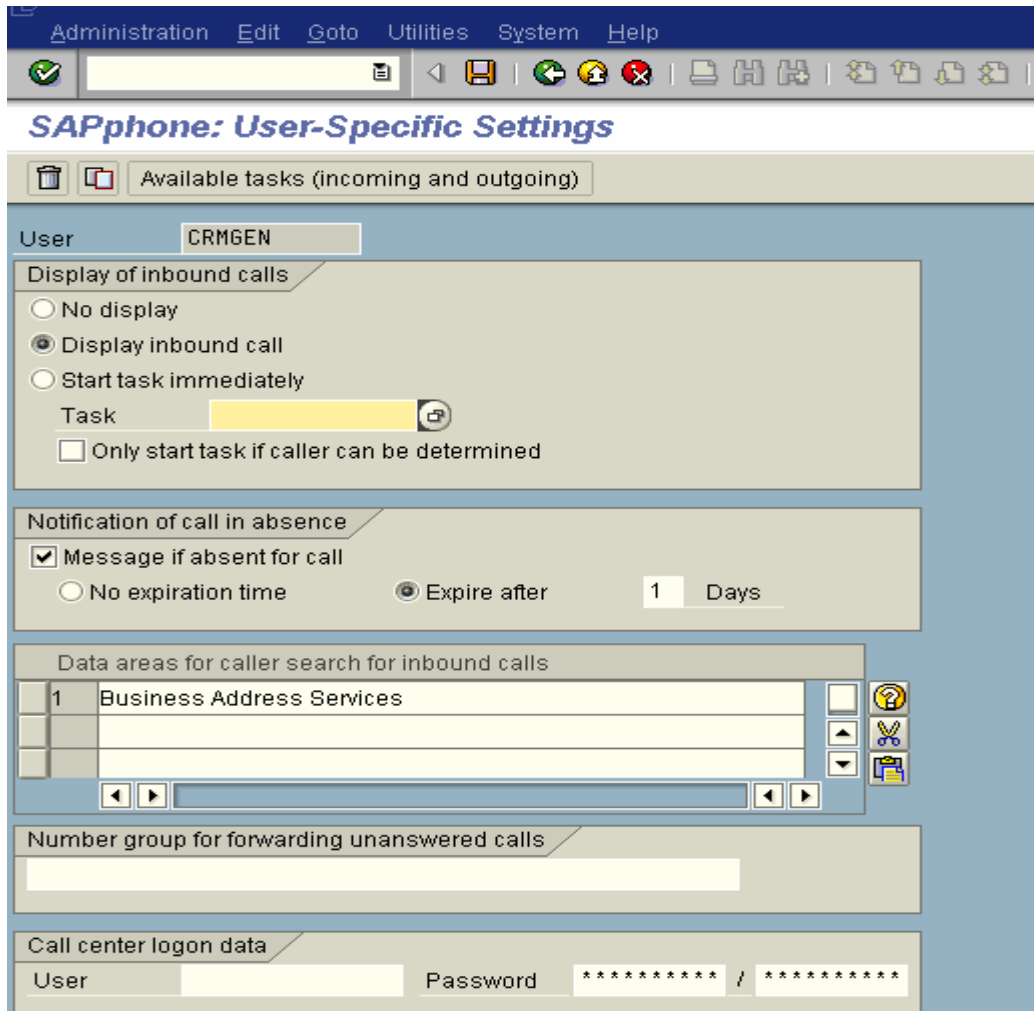
- Do the Telephony Server setting from transaction SPHB
- Maintain the Agent Settings for Telephony from transaction SPHA



- Assign agent to Telephone No., Telephone Server from 'Work Center' - Specific Settings



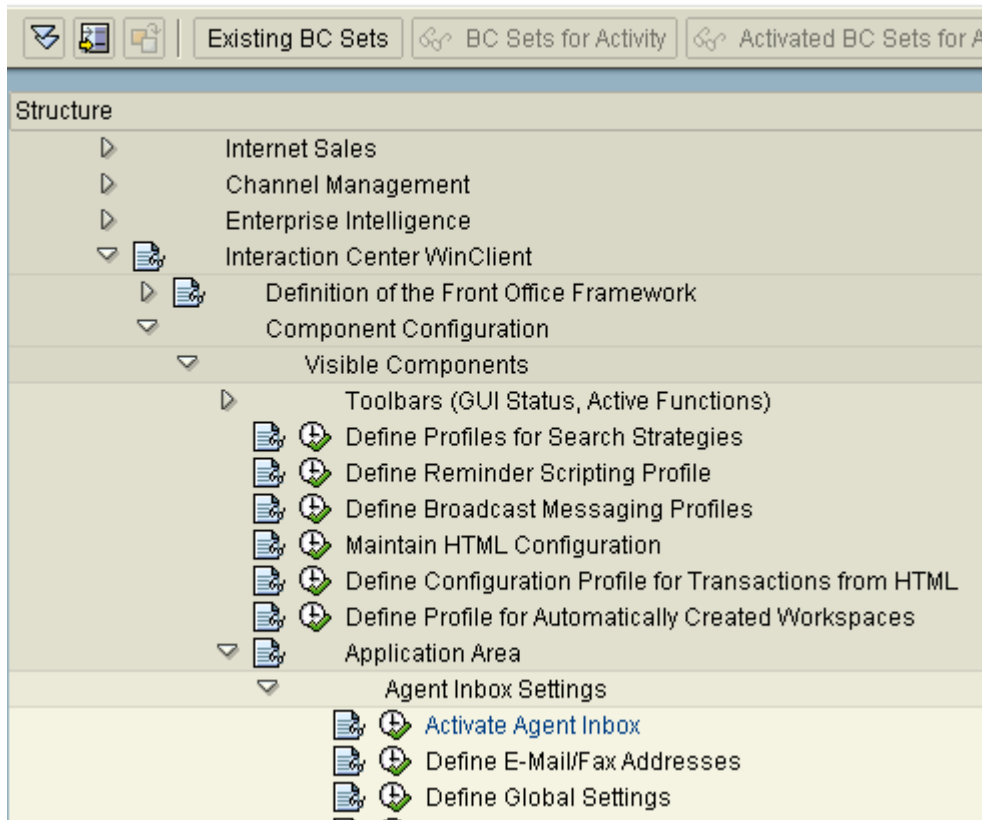
- Once the Telephone settings are done, you can also check the telephone connection by clicking the 'Connection Test' button.
- Now you can go back to main screen of SPHA transaction and do 'User settings' for the Call center agent.



## 8 Activating the set up

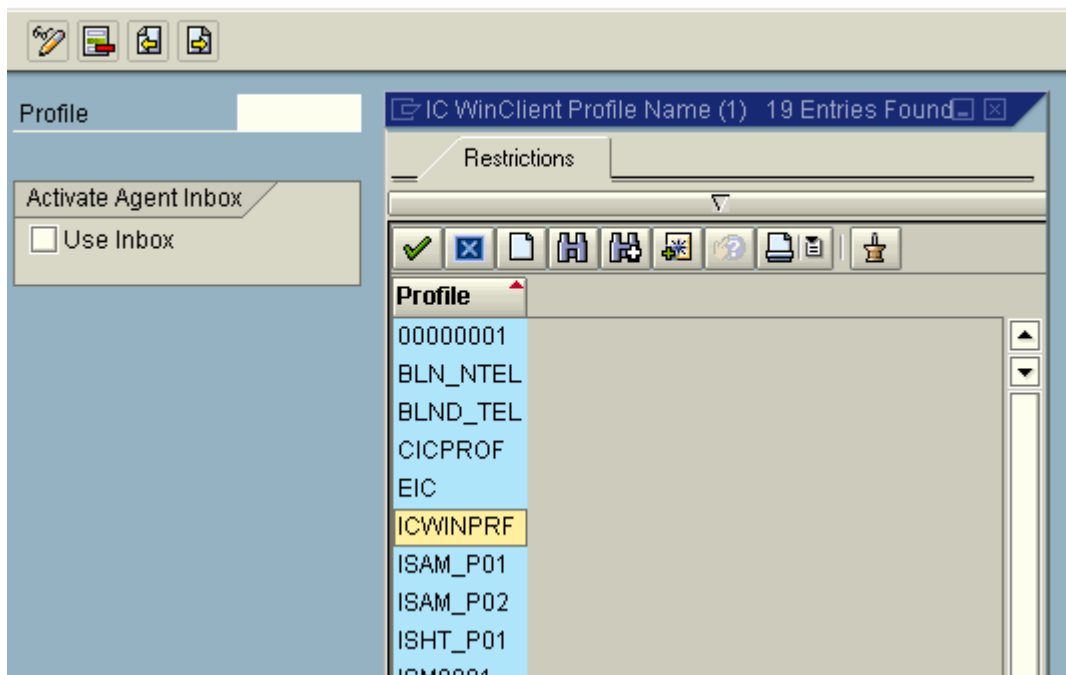
Now to check your configuration, go to SPRO → Customer Relationship Management → Interaction Center Winclient → Component Configuration → Visible Components → Application Area → Agent Inbox Setting → Activate Agent Inbox

## Display IMG



- Add your Profile 'ICWINPRO' by creating a new entry and select checkbox 'Activate Agent Inbox'

## New Entries: Details of Added Entries



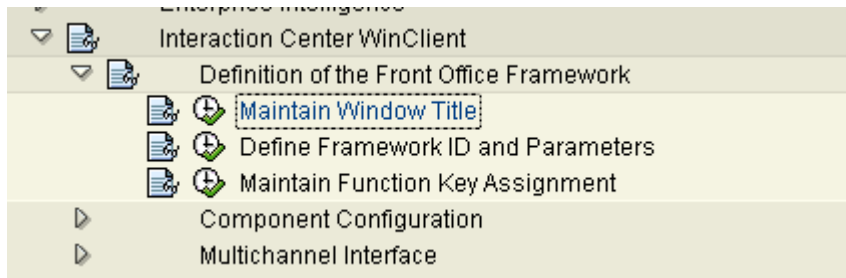
- Save changes to Transport Request.



Test your configuration from transaction CIC0

## 9 Customizing Title

- You can also create a new title for the Framework, from SPRO → Customer Relationship Management → Interaction Center Winclient → Definition of Front Office Framework → Maintain Window Title



- Create a New title 'ZICWIN'
- This title needs to be attached to the Framework ID, from path - SPRO → Customer Relationship Management → Interaction Center Winclient → Definition of Front Office Framework → Define Framework ID and Parameters. Select the Framework 'ICWIN\_Frmework' you created earlier and enter the Title Code 'ZICWIN' in the Title Number field.

Dialog Structure		Framework ID and Parameters		
	Activity fl...	Framework ID	Text	Title number
Framework ID and Parar	<input checked="" type="checkbox"/>	CICFRAMEWORK	Cutom CIC	TIT
Visible Components	<input checked="" type="checkbox"/>	ICWIN_FRAMEWORK	Telephony Enabled IC Win	ZICWIN
Component Cont	<input checked="" type="checkbox"/>	ISAM_FRM01	IS-Automotive (No Telephony)	ISAM_T01
Assignment of Hidde	<input checked="" type="checkbox"/>			

- Save changes to Transport Request.



Test your configuration from transaction CIC0

## 10 Defining Custom Tool bar

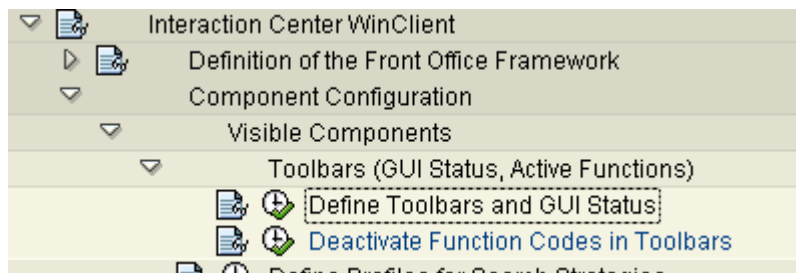
A Toolbar contains the set of menu options and buttons that are available for the user. You can customize the Toolbar by excluding function codes (buttons) by copying the SAP pre delivered GUI Status.

This is a 3 step process:

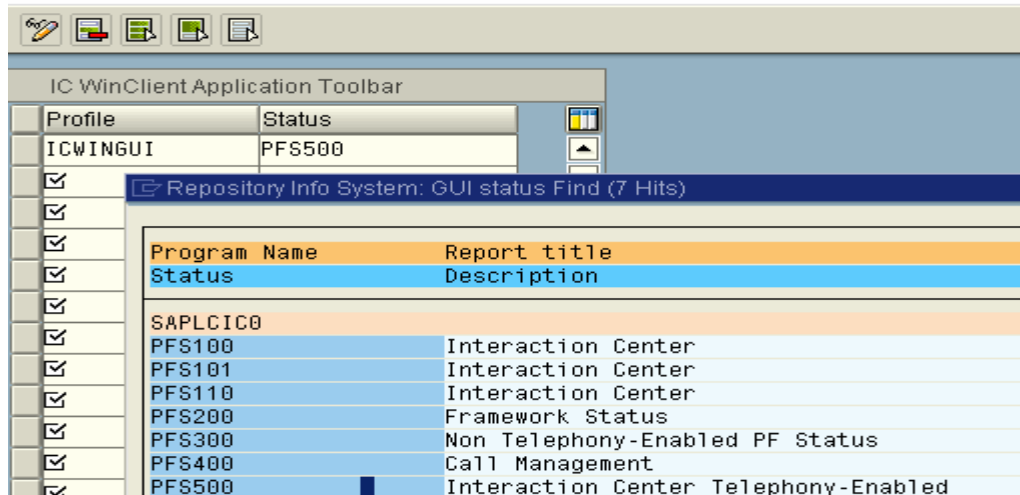
1. Create a new GUI Profile by copying the appropriate SAP's pre delivered GUI Status



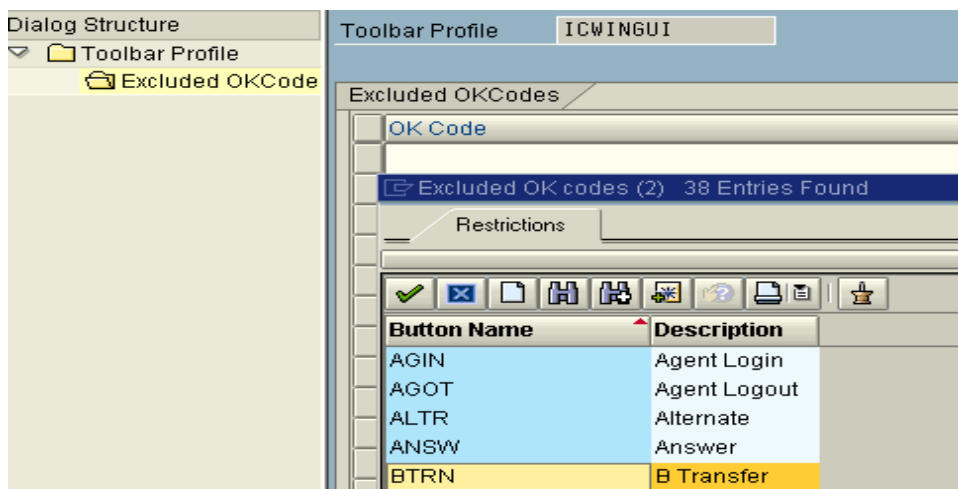
This needs to be configured from path SPRO → Customer Relationship Management → Interaction Center Winclient → Component Configuration → Visible Components → Toolbars → Define Toolbars and GUI Status



### New Entries: Overview of Added Entries

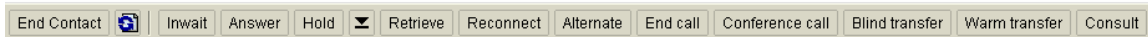


- Exclude the function codes from this profile. Eg; here in the image below we are excluding the 'Blind Transfer' option from the tool bar.



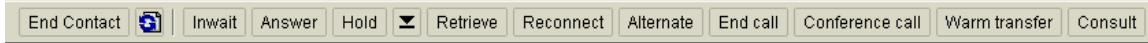
The toolbar before excluding the function code

### IC WIN Client for CRMGEN



The toolbar after excluding the function code

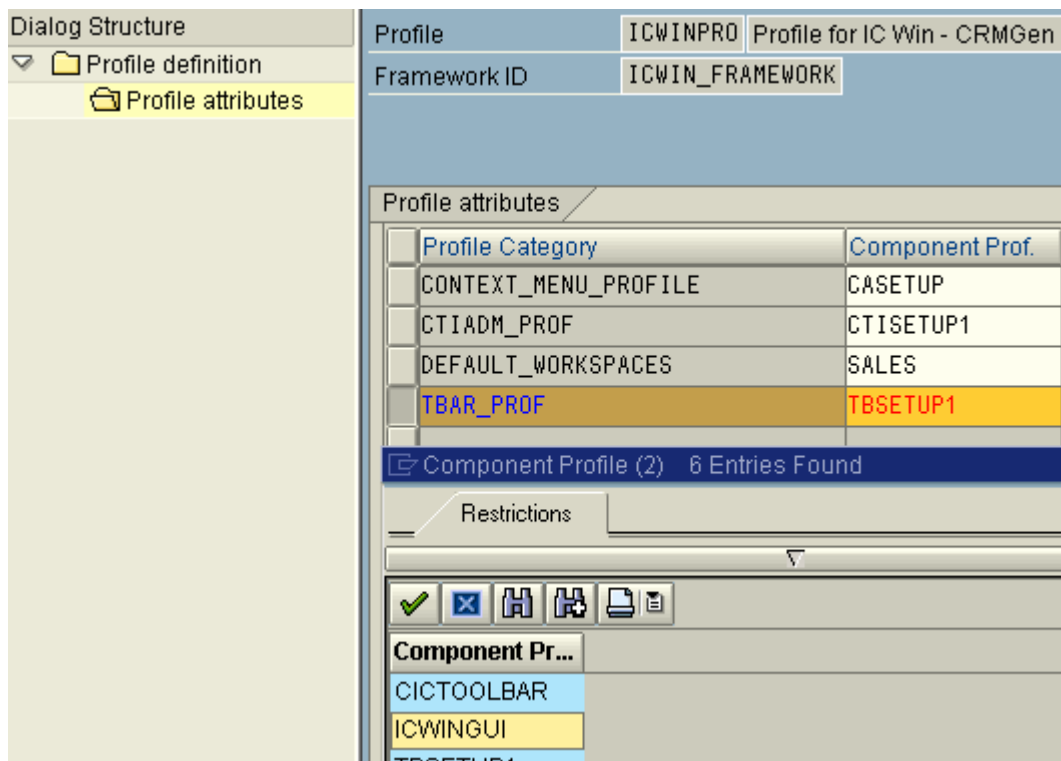
### IC WIN Client for CRMGEN



### 3. Linking this GUI status to our IC Winclient main profile 'ICWINPRO'

Path in SPRO - SPRO → Customer Relationship Management → Interaction Center Winclient → Define IC Win client Profile

Change your IC WIN Client profile 'ICWINPRO' and attach your custom Toolbar GUI status 'ICWINGUI' Profile Attributes, Profile Category TBAR\_PROF



- Test your configuration from transaction CIC0

- If at a later point of time if you want the Deactivated function codes to be active again, repeat step 2 and remove the entry of the function code from 'Excluded OKCodes' table.

## 11 Customizing the Framework by adding / removing slots

Framework can contain up to 7 slots. These slots are containers that can be configured to place required Visible components. You can rearrange these components amongst the slots, and add/remove the components.

### Adding new slots to Framework

- To the Visible Components of the Framework 'ICWIN\_FRAMEWORK' add a new slot (Slot 7 on main screen) and pick up a Component ID (Eg: QUICK\_KEYS) from the available list and save.

The screenshot shows the configuration interface for the framework 'ICWIN\_FRAMEWORK'. The 'Visible Components' section contains a table with the following data:

Position	Comp.ID	Variant	Upper	Lower
Slot 7 of m...	QUICK_KEYS		<input type="checkbox"/>	<input type="checkbox"/>

- Link this to IC Winclient main profile 'ICWINPRO'.  
Path - SPRO → Customer Relationship Management → Interaction Center Winclient → Define IC Winclient Profile
- Add the Profile Category QUICK\_KEYS\_CONFIGURATION and Component Profile QKSETUP1 and save.

### New Entries: Overview of Added Entries

The screenshot shows the configuration interface for the profile 'ICWINPRO'. The 'Profile attributes' section contains a table with the following data:

Profile Category	Component Prof.
QUICK_KEYS_CONFIGURATION	QKSETUP1



- Test your configuration from transaction CIC0. You can find that the Quick Keys in Slot 7 of the Framework.

## 12 Customizing Workspaces in Application and Navigation areas

In both Navigation Area and Application Area you can add up to 9 tabs / Workspaces.

Navigation area workspaces can be configured only from the IMG.

Application area workspaces can be configured either from IMG or through Action box configuration.

Workspaces that are configured from IMG appear automatically when users open the IC WinClient.

Workspaces that are configured as action box workspaces only appear when users call them up from the action box.

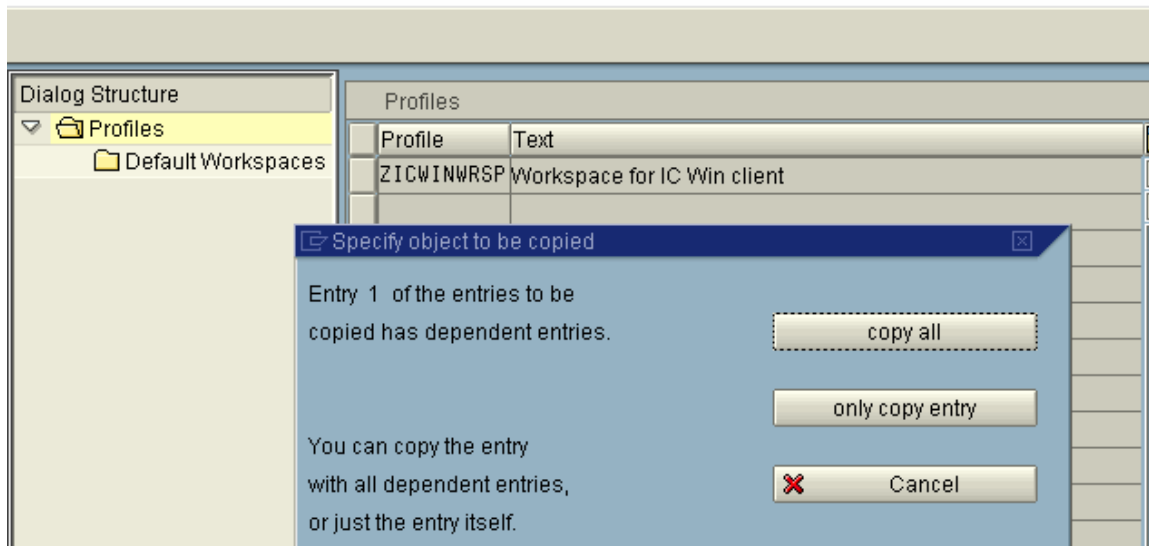
You can configure for both the navigation area and the application area:

- Which tab pages are displayed
- In which order the tab pages are displayed
- Which tab page should first be displayed on top

### Configuration from IMG –

- Path SPRO → Customer Relationship Management → Interaction Center Winclient → Component Configuration → Visible Components → Define Profile for Automatically created Workspaces
- Here Copy the default profile (Eg: SALES to ZICWINWRSP)

### Change View "Profiles": Overview of Selected Set



## Change View "Default Workspaces": Overview

Area	Tab Sequence	Default	Tab ID	Tab Text
Application Area	2nd Tab	<input type="checkbox"/>	GP-SUCHE	BP Search
Application Area	3rd Tab	<input checked="" type="checkbox"/>	SCRIPTING	Scripting
Application Area	4th Tab	<input type="checkbox"/>	SALES	Sales Order
Application Area	5th Tab	<input type="checkbox"/>	SUMMARY	Sales Summary
Application Area	6th Tab	<input type="checkbox"/>	EMAIL	Inbox
Navigation Area	1st Tab	<input checked="" type="checkbox"/>	SUCHEN	Interaction Info
Navigation Area	2nd Tab	<input type="checkbox"/>	KONTAKT	BD Display
Navigation Area	3rd Tab	<input type="checkbox"/>	AUSWAHL	Resources

- Now add the new workspace (from the available list) to Application and Navigation area by using unallocated tabs.

Profile: ZICWINWRSP

Area: Application Area

Tab Sequence: 7th Tab

Default Workspaces

Tab ID: PRD  Default Tab

Tab Text: Product Search

Component Workspace

No default workspace

HTMLOperation HTMLConfig

CompWorkspace Workspace: PRODUCT\_INFO

Profile:

Process class: OPRODUCT\_INFO



If you want to create your own workspace, you can do it from IMG activity SPRO → Customer Relationship Management → Interaction Center Winclient → Customer Specific System Modifications for IC → Define Customer Specific Workspaces.

- Link this to IC Winclient main profile 'ICWINPRO'.

Path - SPRO → Customer Relationship Management → Interaction Center Winclient → Define IC Win client Profile

- Profile Category - DEFAULT\_WORKSPACES and change the Component Profile to 'ZICWINWRSP' that you just created.

Dialog Structure

- Profile definition
  - Profile attributes

Profile: ICWINPRO Profile for IC Win - CRMGen  
 Framework ID: ICWIN\_FRAMEWORK

Profile Category	Component Prof.
ACTION_BOX_CONFIGURATION_SLIM	SALESACT
ACTIVITY_LOGGING_PROFILE	LOGSETUP1
CALL_CENTER_COMP_CONFIGURATION	CCSETUP1
CONTACT_SEARCH_CONFIGURATION	BPSEARCH
CONTEXT_MENU_PROFILE	CASETUP
CTIADM_PROF	CTISETUP1
DEFAULT_WORKSPACES	SALES
QUICK_KEYS_CONFIGURATION	QKSETUP1
TBAR_PROF	ICWINGUI

Component Pr...

- BLENDED
- EIC
- ISAM\_WP01
- ISAM\_WP02
- ISHT\_WP01
- ISM
- SALES
- SAP
- SAP
- SAP
- SBLEND
- SERVICE
- ZBLEND
- ZCICSALES
- ZDFNEWS\_01
- ZICWINWRSP
- ZWS\_01



- Test your configuration from transaction CIC0
- If the 'Default Tab' check box is selected for a workspace, this tab will appear on top in the application area or navigation area when agents start the Interaction Center (IC) WinClient.

### 13 Configuring the Action Box

The Action Box enables agents to execute available transactions quickly and efficiently. The action box can include up to eight groups. From the initial action box configuration screen, you can create, change, display, copy, rename, or delete an action box configuration.

- Path SPRO → Customer Relationship Management → Interaction Center Winclient → Component Configuration → Visible Components → Action Box Settings → Define Configuration Profile for Action Box

- Copy an existing Action box profile 'SALESACT' to 'ZICWIACT'.

### ***Action Box Configuration: Initial Screen***

The screenshot shows a dialog box titled 'Copy Action Box Configuration'. At the top, there is a toolbar with icons for file operations. Below the toolbar, the 'Configuration name' field contains the text 'SALESACT'. The main area of the dialog is divided into two sections: 'From' and 'To'. The 'From' section has a 'Configuration Name' field with 'SALESACT' and a subtitle 'Default Action Box Sales'. The 'To' section has a 'Configuration Name' field with 'ZICWIACT' and a lock icon. At the bottom of the dialog, there are two buttons: a green checkmark icon and a red 'X' icon, followed by the text 'Cancel'.

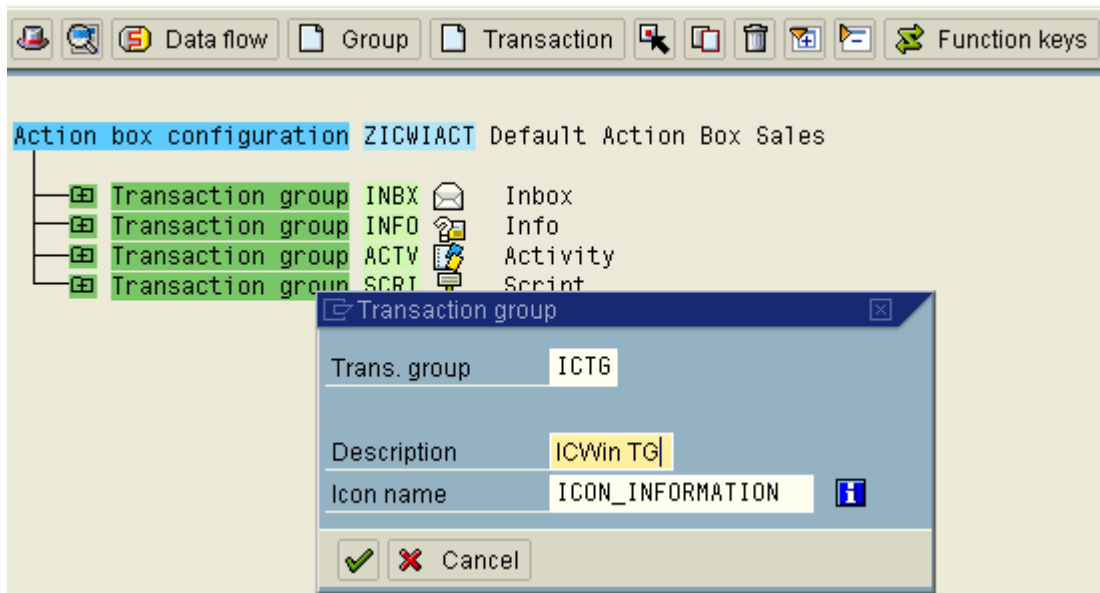
- Link this custom Action Box Profile to IC Win Client main profile 'ICWINPRO'.

Path SPRO → Customer Relationship Management → Interaction Center Winclient → Define IC WinClient Profile

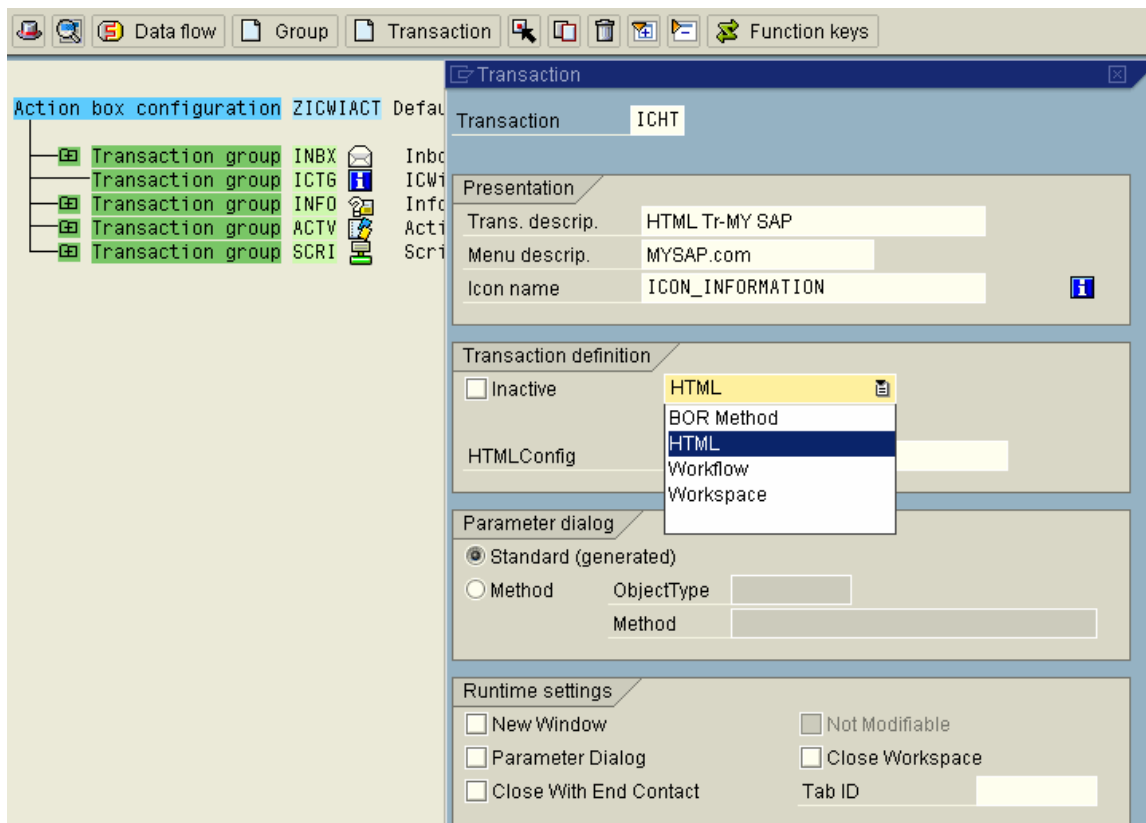
- Select Profile Category - ACTION\_BOX\_CONFIGURATION\_SLIM and change the Component Profile to 'ZICWIACT' that you just created.



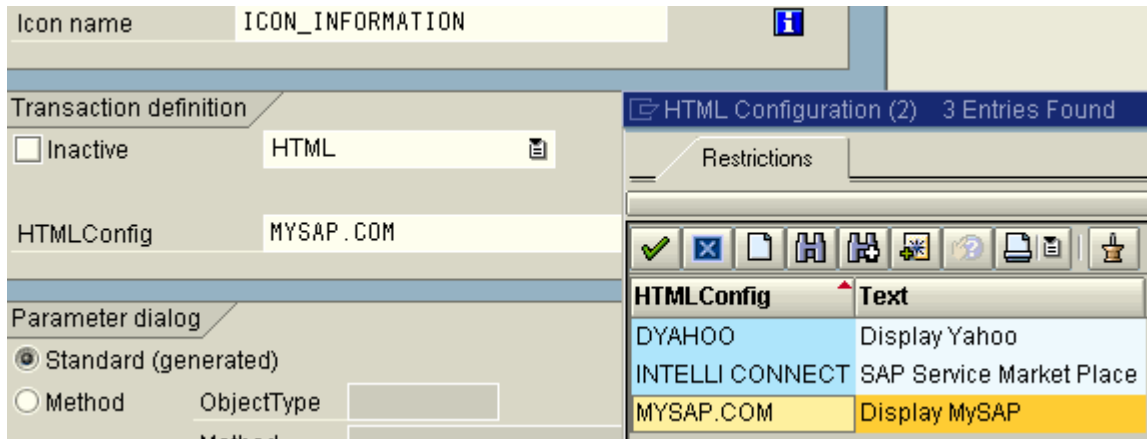




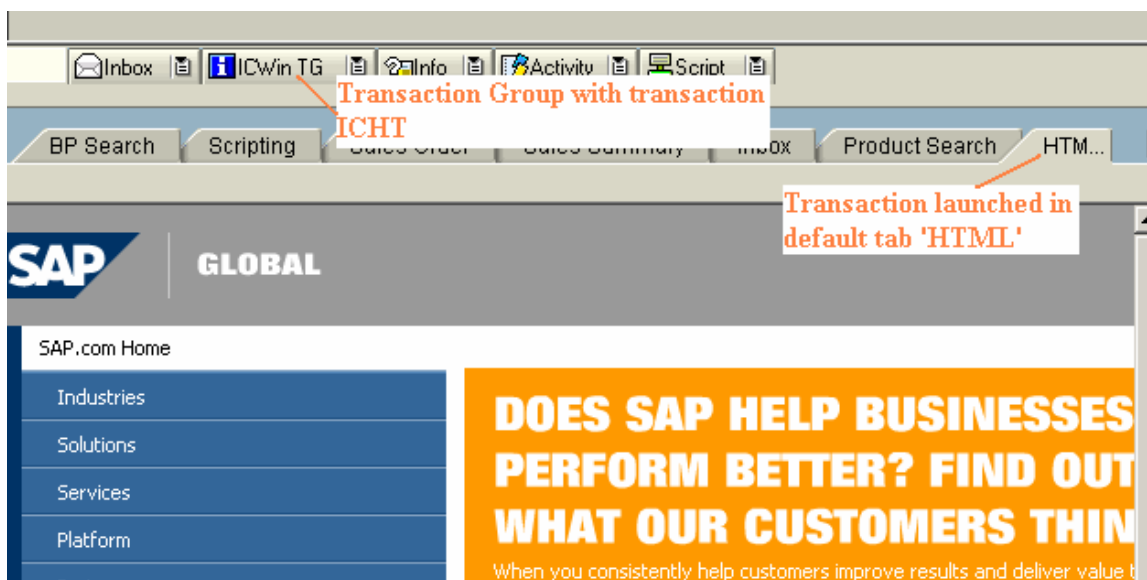
- Create a transaction 'ICT' - HTML Tr-MY SAP. You have to select the method as HTML from the list.



- Once you select the method as 'HTML', the HTML Config field will be input enabled. In this field you need to select the internet site you want to link it to this transaction and save it.

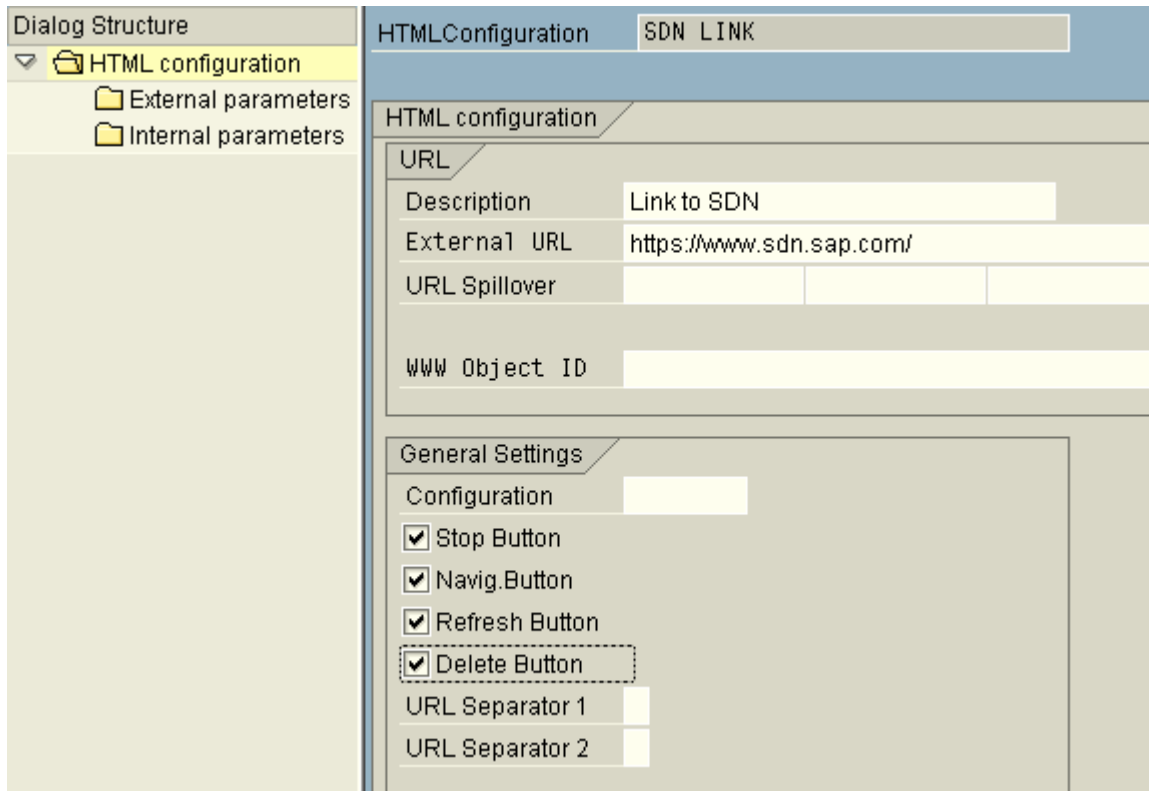


Test your configuration from transaction CIC0. The site mysap.com will be launched in a default tab called 'HTML' of Application area.



The list of HTML configurations needs to be created by you. Path SPRO → Customer Relationship Management → Interaction Center Winclient → Component Configuration → Maintain HTML Config

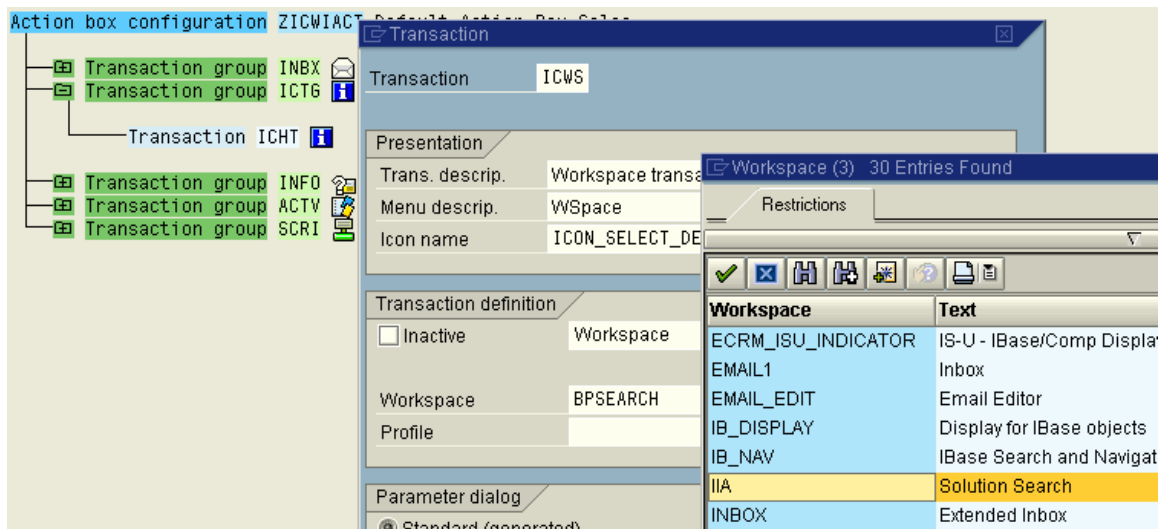
- Create a new entry as follows and save it. This then appears in the HTML Config list of the 'Transaction Definition'.



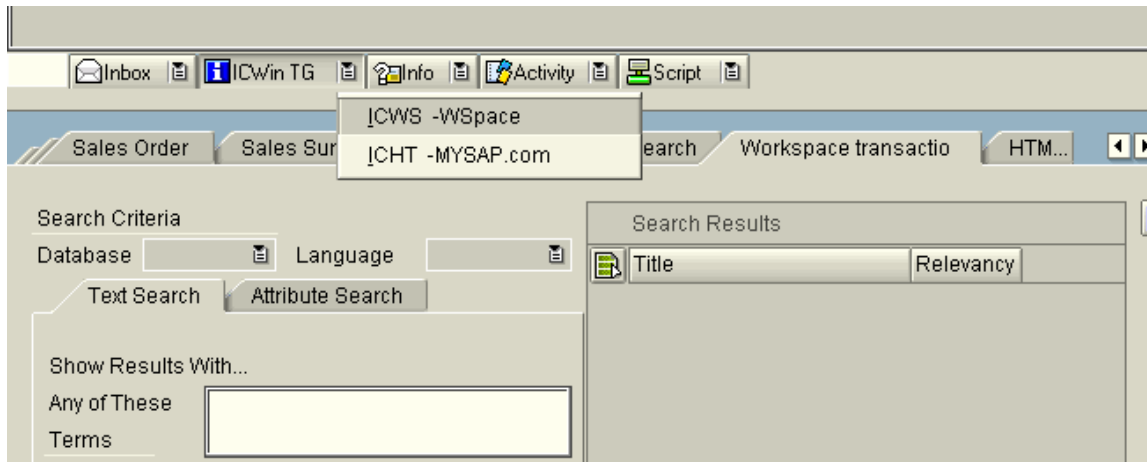
### 13.2 Configuring the Action Box – Workspace Method

In this configuration we will add for demo transaction IIA – Solution Search.

Change your Action Box profile to 'ZICWIACT' and create transaction 'ICWS' under transaction group 'ICTG'. You can assign the Workspace from the available list and save it.



Test your configuration from transaction CIC0. The Workspace IIA will be launched in a default tab called 'Workspace Transaction' of Application area.



Additional Info : The IIA – Solution Search can help you in finding the answers by typing the questions if there are answers maintained in the Solution Database.

Tip: If you want to create your own workspace, you can do it through IMG activity SPRO → Customer Relationship Management → Interaction Center Winclient → Customer Specific System Modifications for IC → Define Customer Specific Workspaces.

## 14 Scripting

### 14.1 Reminder Scripting

We can schedule reminders for the call center agents which appear when certain actions/events occur. For instance, you would like to keep a reminder on 25<sup>th</sup> December to wish your customer.

- Create a Reminder Script profile and assign an Action Code(Event )

This step is to be done from IMG path - Path SPRO → Customer Relationship Management → Interaction Center Winclient → Component Configuration → Visible Components → Define Reminder Scripting

## New Entries: Overview of Added Entries

Scripting profile	Action Code
ICWIN_Rem	<input checked="" type="checkbox"/>

IC WinClient Action (1) 47 Entries Found

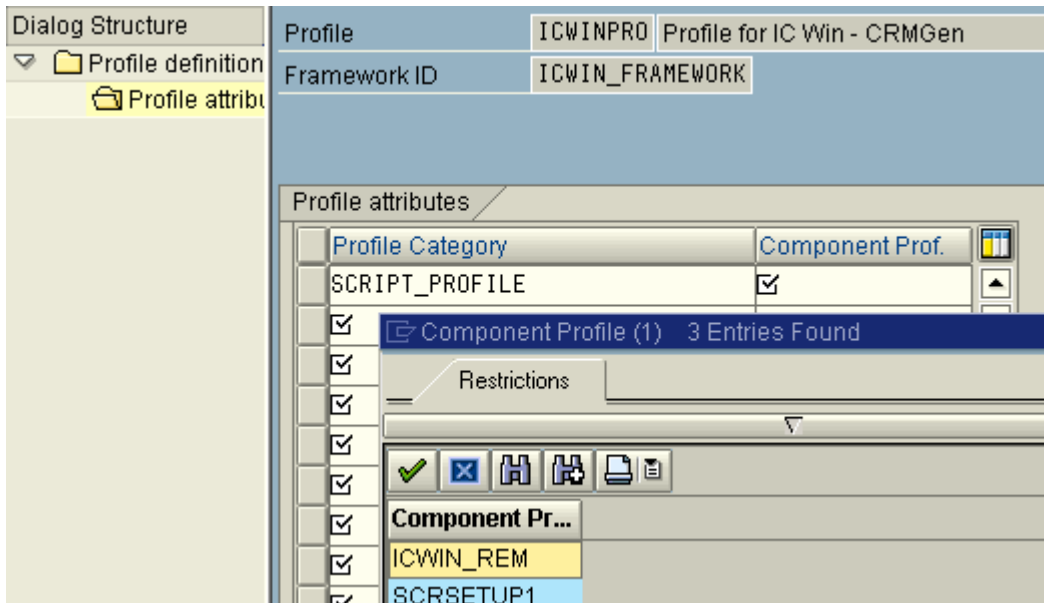
Restrictions

Act.	Action Description
DROPPED_SELF	DROPPED SELF
EML_PICKED	EMQIL PICKED
END_CONTACT	END CONTACT/CALL WRAPUP
ENTERING_INWAIT	ENTERING INWAIT
EXIT_CALL_MGMT	EXIT CALL MANAGEMENT
INWAIT_FAILED	INWAIT FAILED
INWAIT_RETURNED	INWAIT RETURNED
QUIT_CALL_MGMT	QUIT CALL MANAGEMENT
RECONNECT_CALL	RECONNECTED CALL
SCRIPTING	SCRIPTING ACTIVITY
SEARCH_SELECT	SEARCH SELECTION
START_CCM	START CALL MGMT SYSTEM NEWS

- Assign Reminder Scripting Profile 'ICWIN\_REM' to IC Profile 'ICWINPRO'.

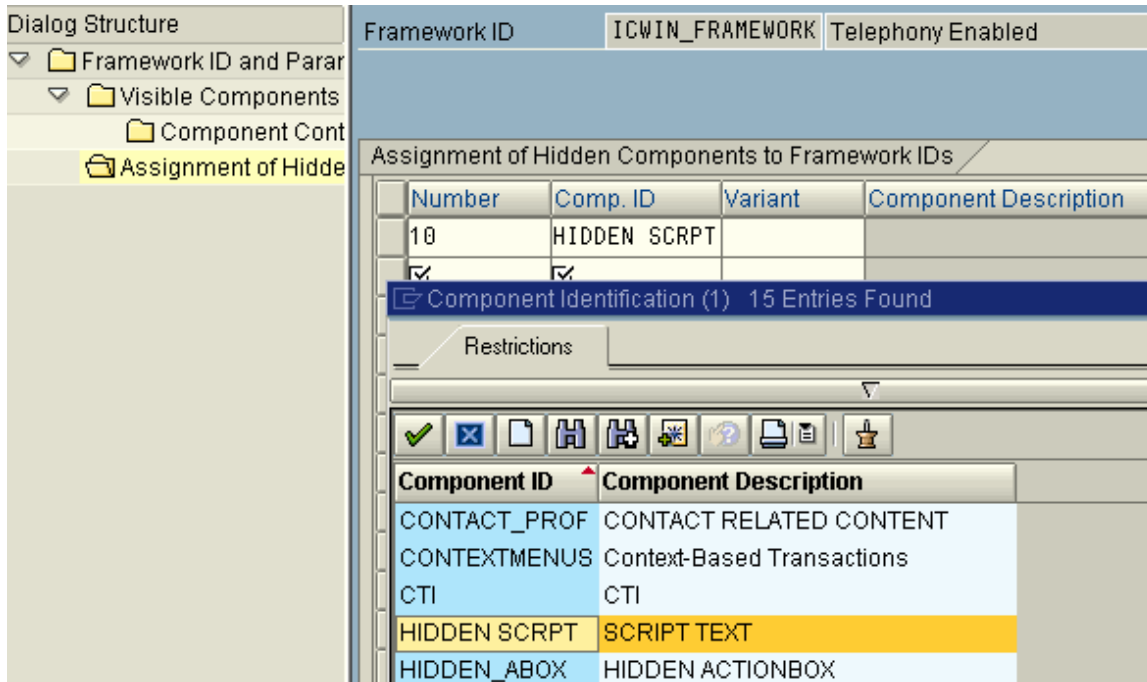
Path SPRO → Customer Relationship Management → Interaction Center Winclient → Define IC WinClient Profile

- Select Profile Category - SCRIPT\_PROFILE and change the Component Profile to 'ICWIN\_REM' that you just created.



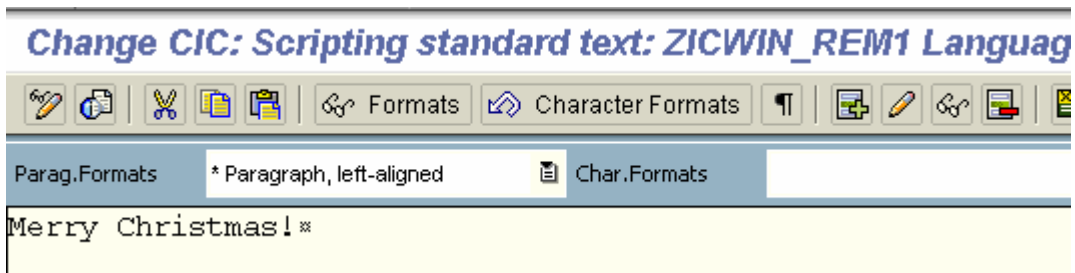
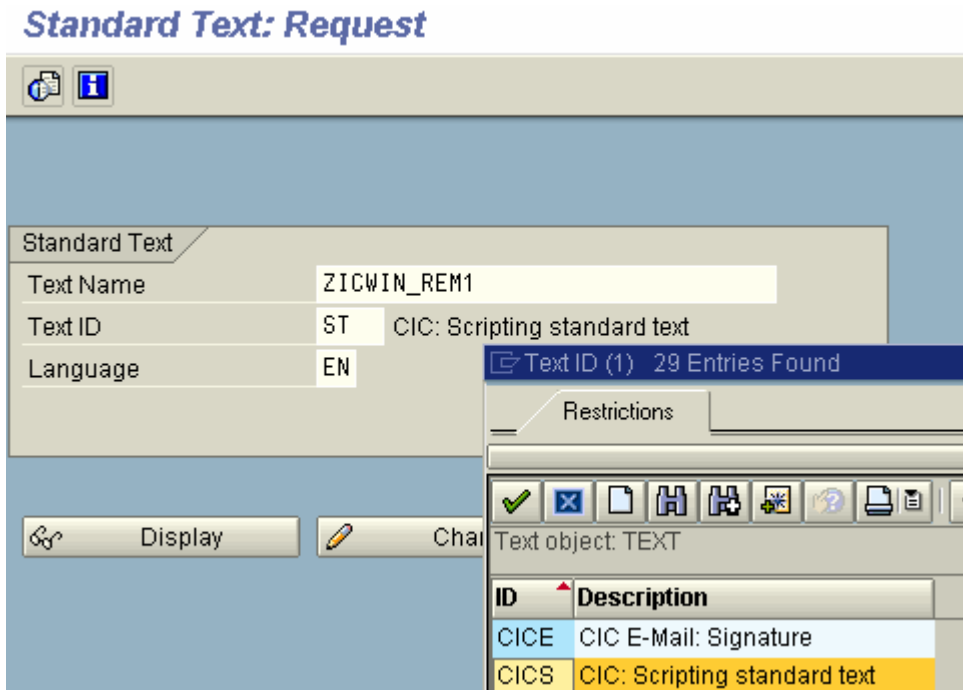
- Add Hidden component 'HIDDEN SCRIPT' to Frame work ID – 'ICWIN\_FRAMEWORK' for the SCRIPT Profile.

Path - SPRO → Customer Relationship Management → Interaction Center Winclient → Definition of the Front Office Framework → Define Frame Work ID and Parameters → Select 'ICWIN\_FRAMEWORK' → Assignments of Hidden Components to Framework ID



- Maintaining Texts and Variables for Reminder scripts

- Go to SAP Easy Access Menu – Interaction Center → Administration → Scripting → Transaction CIC9
- Create a Reminder script text – 'ZICWIN\_REM1' with Text ID – 'CICS'



- You can create some Variables(System Variable fields) to add to this text form Transaction CIC2
  - Assign the Reminder Text 'ZWIN\_REM1' to Reminder script profile from Transaction CIC1
- Select Scripting Profile – 'ICWIN\_REM' and the other details as shown in the Pic

### New Entries: Details of Added Entries

Scripting profile	ICWIN_REM
Action Code	START_CCM
Valid from date	18.05.2006
Valid to date	19.05.2006
Text ID	CICS
Text name	ZICWIN_REM1
<input type="checkbox"/> Append Script	



Test your configuration from transaction CIC0.

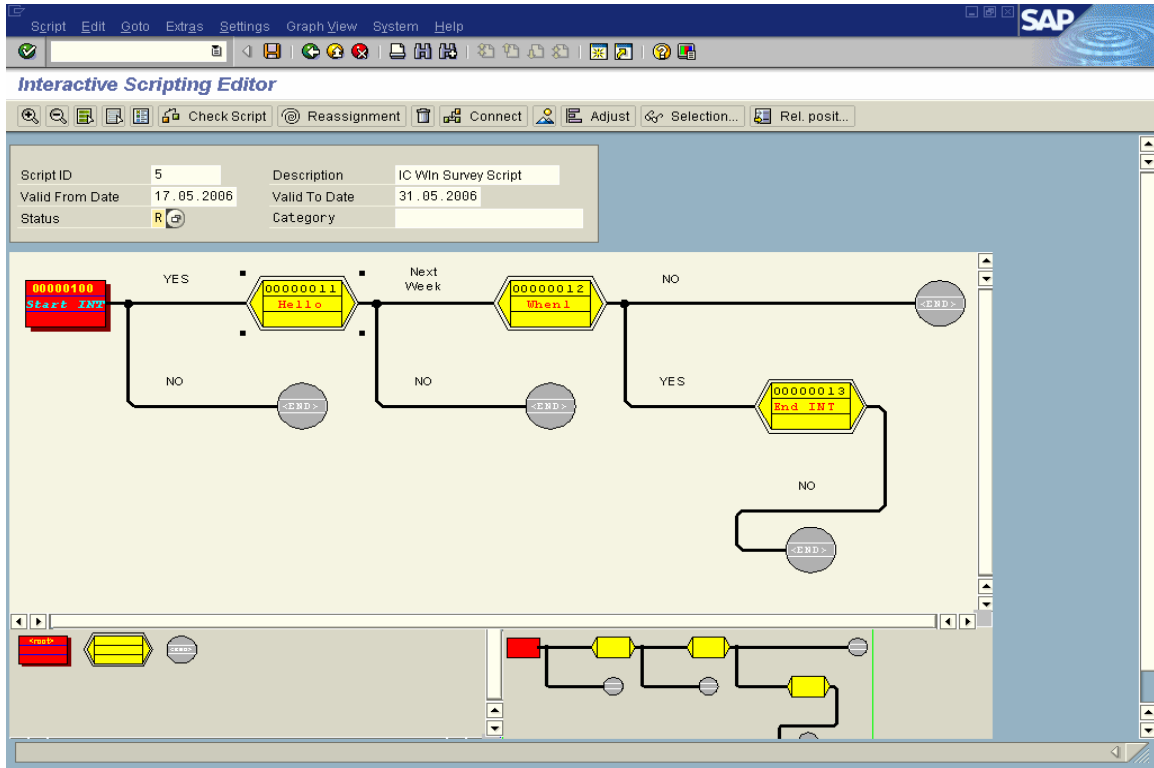
### IC WIN Client for CRMGEN

## 14.2 Interactive Scripting

We can define Interactive Scripts and use for a scenario where in an Organization needs to conducts a survey of their customers and get their feedback. An agent will be given a predefined set of questions they can ask a customer to get the feedback or / Predefined set of answers/information they can give to a customer while they deal with a particular product query.

- Creating Interactive Scripts
  - Go to SAP Easy Access Menu – Interaction Center → Administration → Scripting → Transaction CRMM\_TM\_SCRIPT – Maintain Interactive Script Structures
  - Create a script with an unique id eg: Script Id – 5, Description – IC Win Survey Script. Also enter a validity period.
  - Create the flow of interaction attaching required texts. The texts needs to be created initially from transaction CIC9 with Text ID – ST
  - Once the script is saved, change the status to Active, Active Root tree





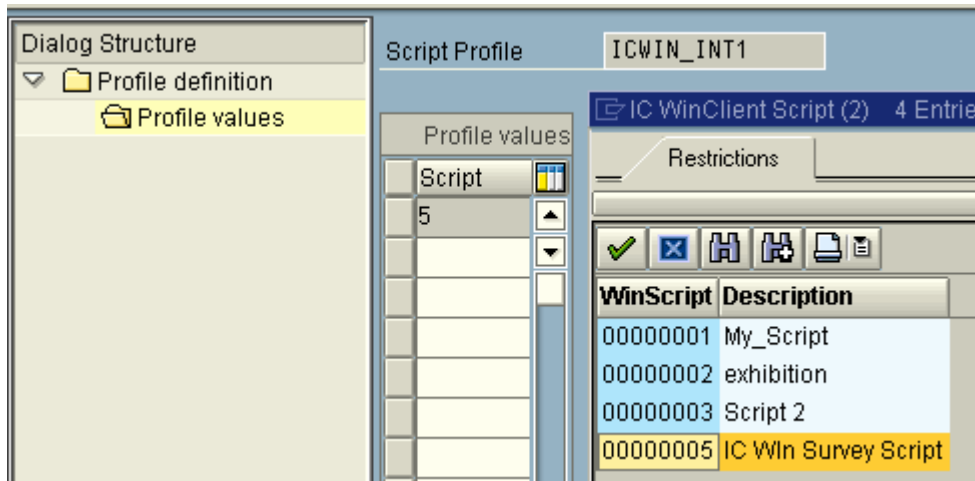
- Create a Interactive Script profile
  - This step is to be done from IMG path - SPRO → Customer Relationship Management→ Interaction Center Winclient →Component Configuration→ Visible Components→ Application Area →Define Interactive Scripting Profile

Dialog Structure	
Profile definition	Profile definition
Profile values	Profile values

Profile definition	
profile	Descript.
ICWIN_INT1	Survey Script

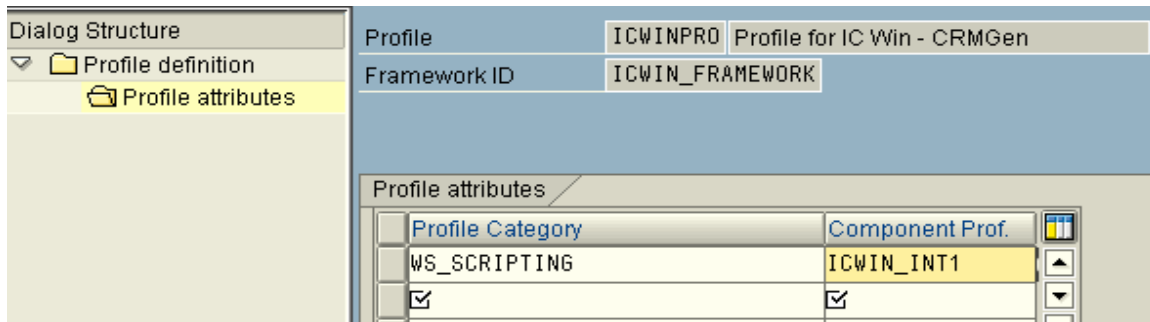
- Double click the profile to link Interactive script you created in previous step.( Script Id – 5, Description – IC Win Survey Script.)



- Assign Interactive Scripting Profile 'ICWIN\_INT1' to IC Profile 'ICWINPRO'.

Path SPRO → Customer Relationship Management → Interaction Center Winclient → Define IC WinClient Profile

- Select Profile Category – WS\_SCRIPTING and change the Component Profile to 'ICWIN\_INT1' that you just created.



- To Assign the interactive Script to default Workspace
  - This step is to be done from IMG path - SPRO → Customer Relationship Management → Interaction Center Winclient → Component Configuration → Visible Components →
  - Select our default Workspace Profile 'ZICWINWRSP' and double click on tab id 'SCRIPTING'.
  - Select the Profile under COMPWORKSPACE as Interactive Scripting Profile 'ICWIN\_INT1' which you just created.

The screenshot shows the SAP configuration interface for profiles and workspaces. On the left, a tree view shows 'Dialog Structure' with 'Profiles' and 'Default Workspaces' expanded. The main area is divided into several sections:

- Profile:** ZICWINWRSP
- Area:** Application Area
- Tab Sequence:** 3rd Tab
- Default Workspaces:**
  - Tab ID: SCRIPTING6 (with a checked 'Default Tab' checkbox)
  - Tab Text: Scripting
- Component Workspace:**
  - No default workspace
  - HTMLOperation HTMLConfig
  - CompWorkspace
    - Workspace: SCRIPT
    - Profile: ISCRIPTPROF1
    - Process class: OSSCRIPT ISCRIPTPROF1

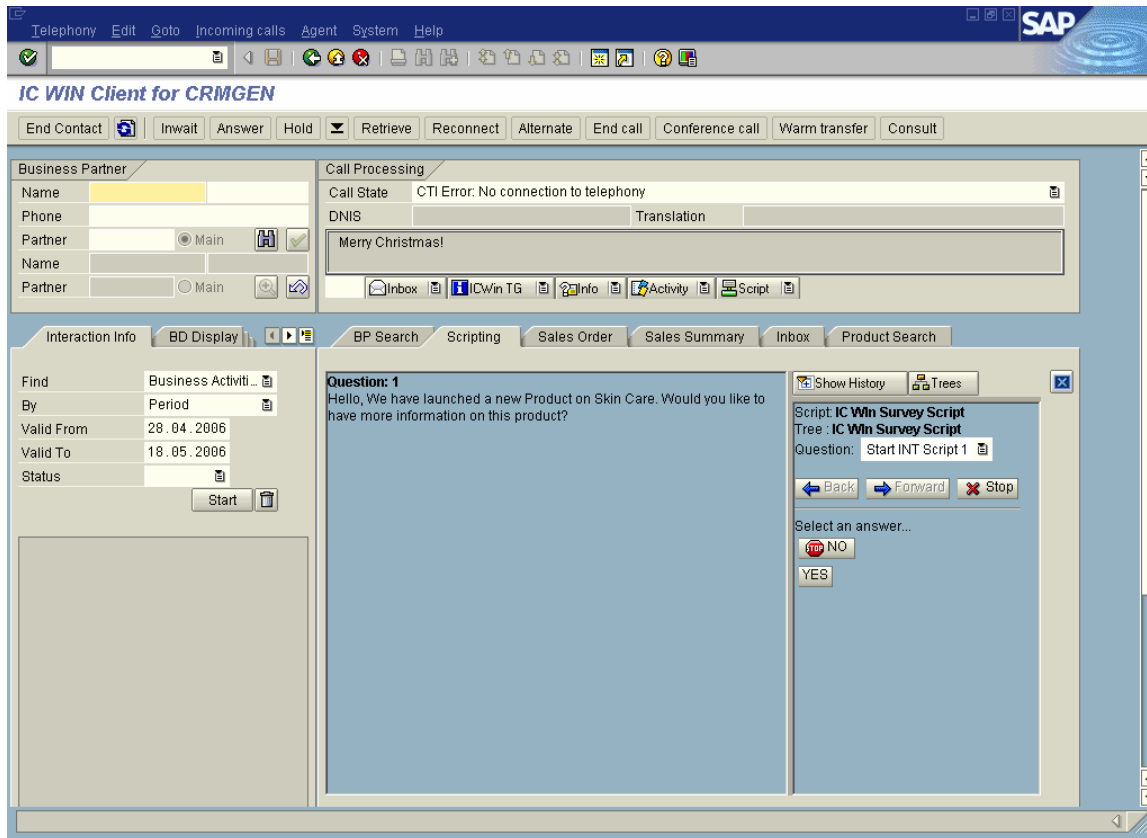
On the right, a pop-up window titled 'Profile (2): 7 Entries Found' shows a table of profiles:

Profile	Text
ICWIN_INT1	Survey Script
ISCRIPTPROF1	Default scripting
SSCRIPTPROF1	Survey scripting
ZPROFILE4	new profile
Z_PROFILE	Profile for Intercat
Z_PROFILE3	Profile 3
Z_PROF_11	profile 11



Test your configuration from transaction CIC0.. You can start the Interactive script from the link on the workspace or form Action Box

The screenshot shows the SAP transaction CIC0. The top bar displays 'DNIS' and 'Translation'. Below this, a message reads 'Merry Christmas!'. A toolbar contains icons for 'Inbox', 'ICWin TG', 'Info', 'Activity', and 'Script'. A navigation bar shows tabs for 'BP Search', 'Scripting', 'Sales Order', 'Sales Summary', 'Inbox', and 'Product Search'. The main content area has a 'SCRP -Interactive script' header and a 'Select language' dropdown set to 'English'. Below that, it says 'Select script to run...' and lists a link for 'IC Win Survey Script'.



## 15 Alert Modeler

Alert modeler can be used to expose CRM data to JavaScript or trigger actions inside CRM from JavaScript. The Alert modeler is linked to a Meta model, Meta models may include a list of available IC WinClient events, data objects (published by IC WinClient components), and functions providing access to IC WinClient components (such as triggering an action box transaction).

You can use Alert Modeler to expose data in 2 ways,

- o Exposing data to the alert modeler
- o Exposing Methods to the alert modeler

In this exercise we will use the default Meta model event `BP_STATUS_DETERMINED`.

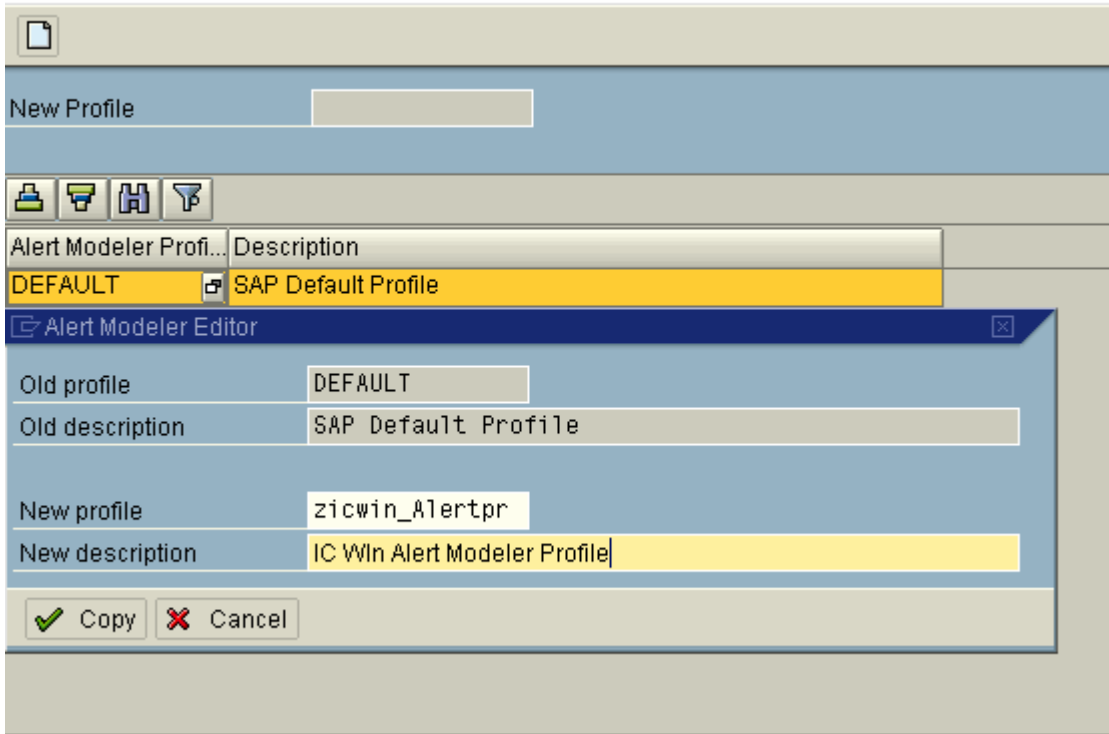
We will write a JavaScript code that will display a message in the reminder scripting area informing the agent that the current business partner has a Diamond status.

- Copy an Alert Modeler profile and customize it.

This step is to be done from IMG path - Path SPRO → Customer Relationship Management → Interaction Center Winclient → Component Configuration → Hidden Components → Alert Modeler → Define Alert Modeler Profiles

Copy the default profile 'DEFAULT' to 'ZICWIN\_ALERTPR'.

## Alert Modeler Editor



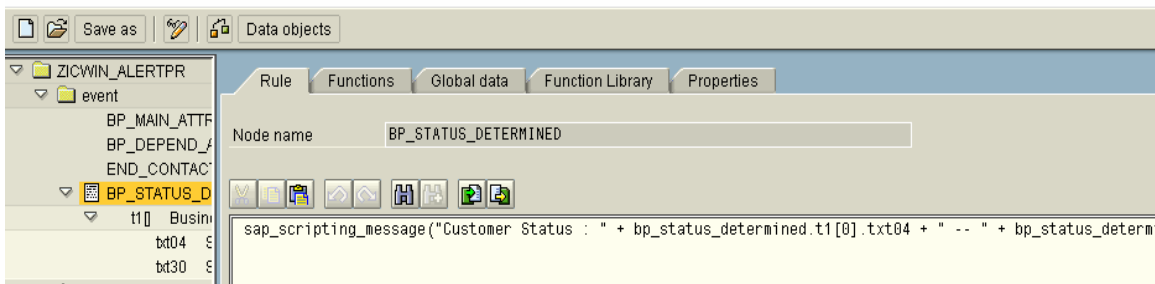
Display the copied profile, it will list all the events and data objects. You can find all the functions which can be used under function library tab. You can also create your own function events, this should be done in the Meta modeler profile - transaction CRMC\_CIC\_AM\_META.

In the Global parameters you can define any global variables that can be used in functions.

- Select the event BP\_STATUS\_DETERMINED and enter rule - `sap_scripting_message("Customer Status : " + bp_status_determined.t1[0].txt04 + " -- " + bp_status_determined.t1[0].txt30);`

Save the changes.

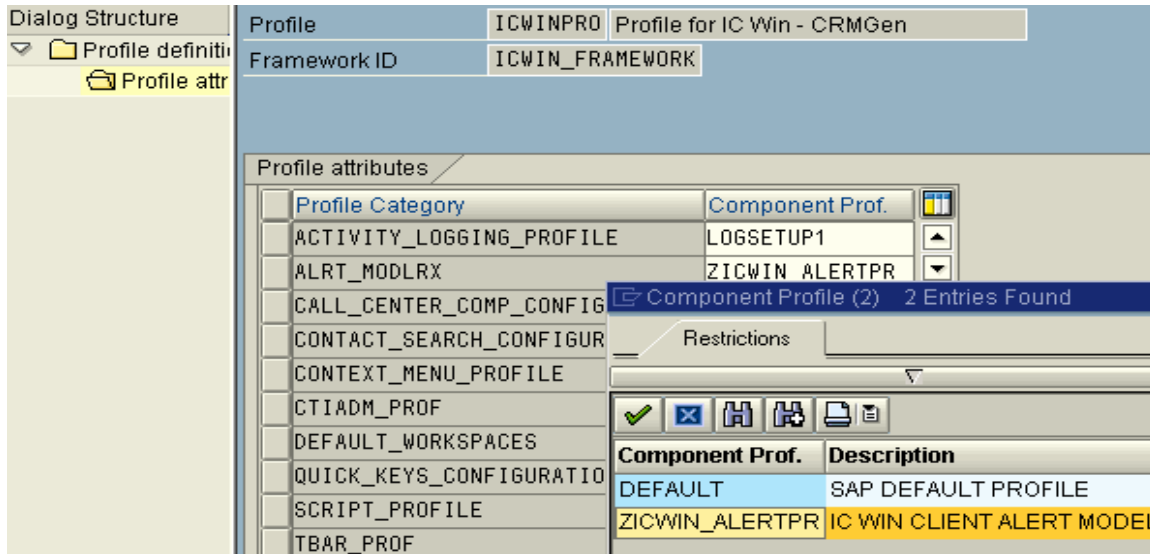
## Alert Modeler Editor



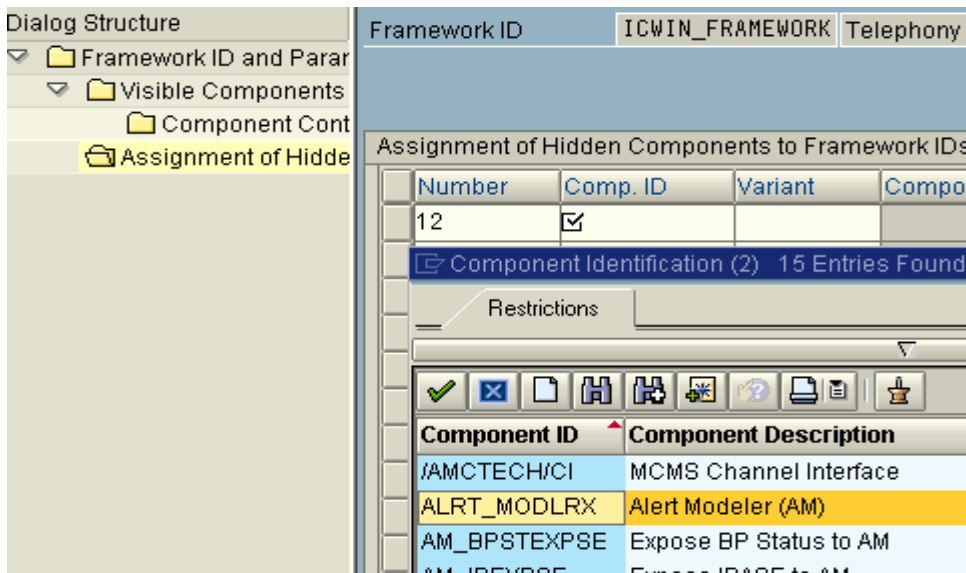
- Assign Alert modeler Profile 'ZICWIN\_ALERTPR' to IC Profile 'ICWINPRO', to

Path SPRO → Customer Relationship Management → Interaction Center Winclient → Define IC WinClient Profile

- Select Profile Category – ALRT\_MODLRX and change the Component Profile to ‘ZICWIN\_ALERTPR’ that you just created.



- Add Alert modeler Component ID to your Frame work ID ‘ICWIN\_FRAMEWORK’ Path SPRO → Customer Relationship Management→ Interaction Center Winclient→Definition of Front Office Framework → Define Framework ID and Parameters



- You need to also add Hidden component AM\_BPSTEXPSE, Component ID AM\_BPSTEXPSE to your Frame work ID ‘ICWIN\_FRAMEWORK’

Path SPRO → Customer Relationship Management→ Interaction Center Winclient→Definition of Front Office Framework → Define Framework ID and Parameters

Note: Hidden component AM\_BPSTEXPSE is used by ABAP class exposes the status code and the status code description of a business partner to the alert modeler. This is associated with the Meta model event BP\_STATUS\_DETERMINED.).

Dialog Structure		Framework ID	ICWIN_FRAMEWORK	Telephony Enabled
▼	Framework ID and Parameters			
▼	Visible Components			
	Component Cont			
	Assignment of Hidden	Assignment of Hidden Components to Framework IDs		
Number	Comp. ID	Variant	Component Description	
8	CIC_TOOLBAR		CIC APPLICATION TOOLBAR/E	
9	CONTEXTMENUS		Context-Based Transactions	
12	AM_BPSTEXPSE		Expose BP Status to AM	



Test your configuration from transaction CIC0. Search for a Business Partner with a status you can see the 'Customer Status: -----' being displayed in Reminder Script area.

### IC WIN Client for CRMGEN

The screenshot shows the IC WIN Client for CRMGEN interface. At the top, there are call control buttons: End Contact, Inwait, Answer, Hold, Retrieve, Reconnect, Alternate, End call, Conference call, Warm transfer, and Consult. Below this, the 'Business Partner' section shows details for a partner named 'Banu' with ID '2000001393'. A red box highlights the partner ID, with a callout 'BP Searched'. The 'Call Processing' section shows 'Customer Status : 0009 -- Diamond' and 'Merry Christmas!'. A red box highlights the status, with a callout 'BP Status code & Description appended to Reminder script area'. The bottom section shows search criteria for 'Business Partner 1' with the same ID and name 'Banu'.

## 16 Disclaimer and Liability Notice

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