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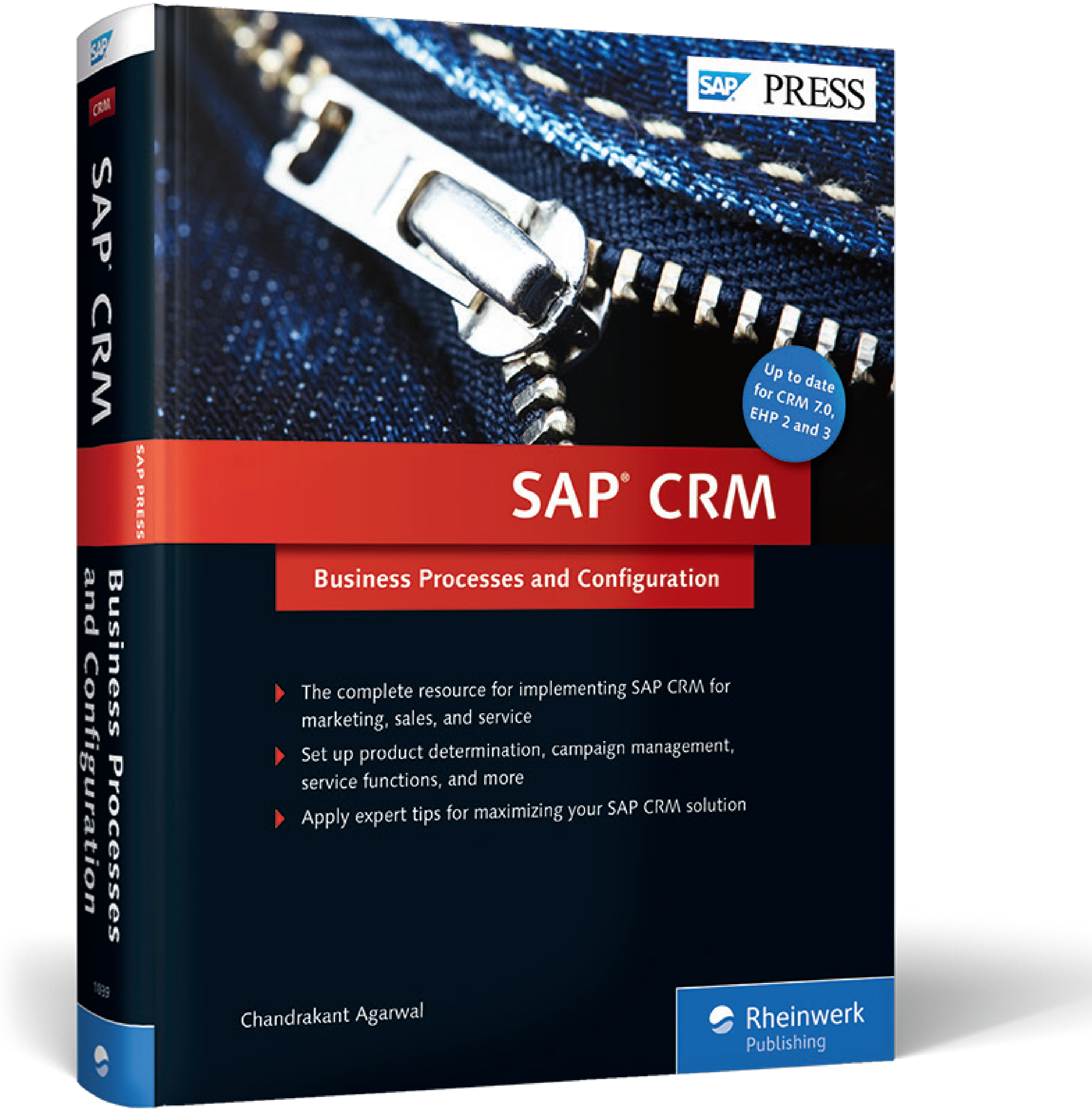


# Reading Sample

*The Interaction Center is an SAP CRM application that enables an organization to connect to customers through multiple channels. In this reading sample, we'll look at the different business functions of the Interaction Center as well as its various integration scenarios.*



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*The Interaction Center is a core SAP CRM application that enables an organization to connect to customers through multiple channels. In this chapter, we'll look at the different Interaction Center integrations and configurations.*

# 9 Interaction Center

As its name insinuates, the Interaction Center (IC) is an interaction between the seller and the buyer through a core SAP CRM application. Customers call an agent to place a new order or to express their grievances regarding a product they bought. The IC effectively manages customer interactions to resolve customer problems and support both the agents and manager who are involved in the interaction. The IC allows agents to manage both inbound and outbound communications in the form of email, phone, fax, chat, web, and more.

The IC is spread across SAP CRM business Marketing, Sales, and Service, which we refer to as IC Marketing, IC Sales, and IC Service, respectively. IC Management corresponds to the different channels when communicating with the customer. In addition, IC Analytics plays an important role in understanding the customer from an interaction record perspective.

In this chapter, we'll look at the different integrations that can be used with the IC, along with the additional functions provided with the application. We'll begin by looking at some of the business functions the IC provides.

## 9.1 Business Functions

The IC's core capabilities include telemarketing, telesales, customer service, shared service, and IC Analytics. Let's go through each of these core business functions briefly:

- **Telemarketing**
  *Telemarketing* provides sales representatives in an organization with the ability

to carry out campaigns and generate leads from those campaigns. Through telemarketing, you can generate a call list that can be used to make cold calls to leads. These leads can be nurtured and converted into opportunities, and finally sales. Additionally, a representative can also personalize certain products and offers for specific customers.

- **Telesales**
  *Telesales* offers a wide range of functionality within accounts management, contact management, quotation management, and sales order management. The motivation of any organization is to sell its products and generate revenue. Sales representatives or customer service can create a quote and sales order from the IC telesales and then review or create accounts and contacts. Customer service has the capability to access account fact sheets (see Section 9.4.2) and review customer information. With telesales, the sales representative can create leads and opportunities as the part of presales activity.
- **Customer service**
  Customers call to place complaints about products purchased from an organization. The IC gives customer service the ability to log those complaints and service the customers appropriately. This helps to quickly resolve customer complaints.
- **Shared services**
  IC capabilities also include shared services key functions such as the employee IC, accounting IC, and IT service desk.
- **IC Management**
  IC Management allows you to manage key features such as routing rules, communication channels, and assigning customers to the right agent.
- **IC Analytics**
  IC Analytics offers reporting capabilities with respect to communication analytics, process-based analytics, and blended analytics.

Figure 9.1 shows the SAP CRM IC WebClient layout highlighted with the following key IC features:

❶ **Scratch pad**
This is a workspace for storing electronic notes in the IC.

❷ **Toolbar**
This shows the different options for customer service representatives to take when the call is received by the customer. For example, customer service representatives can accept or reject a call, transfer a call, or conference a call.

❸ **Account information**
This shows the information of the active customer on call such as customer name and company.

❹ **Alert**
This shows the information that helps customer service representatives take necessary steps when the customer is on call. For example, an alert might be a reminder to close the call after a specified time period.

❺ **Communication information**
This shows the information from Communication Management Software (CMS), for example, a customer calling number and whether the call is an inbound or outbound with the duration of the call.

❻ **Broadcasting messaging**
This shows the message that can be broadcasted to the whole customer service representative group.

❼ **Queue status**
This shows the business role you've been assigned to and the date and time.

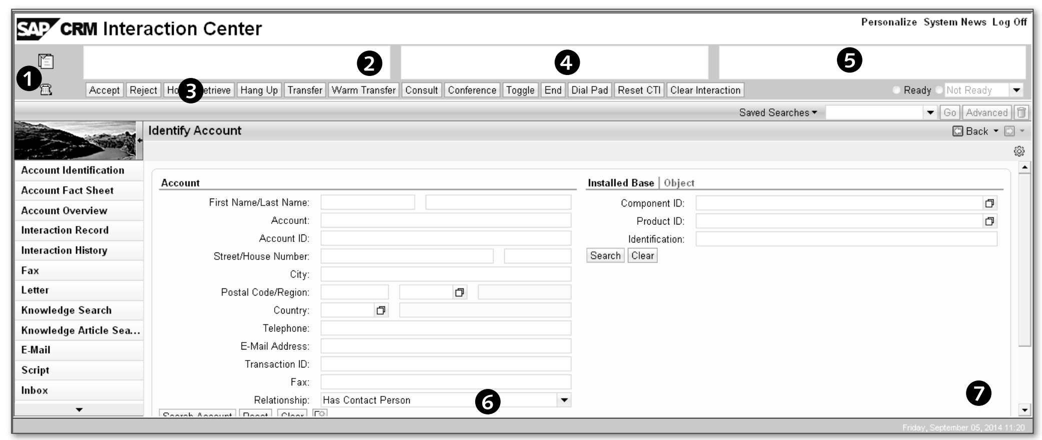



**Figure 9.1** Interaction Center WebClient Layout

The IC navigation bar profile can be configured to suit your business needs and include IC Marketing, IC Sales, or IC Service functions. In the sections that follow, we'll look at the IC Marketing, Sales, and Service functionalities available.

### 9.1.1 IC Marketing

IC Marketing covers most of the marketing functionality, including the marketing planning, Campaign Management, customer segmentation, creating target groups, Lead Management, and Loyalty Management. These topics are covered in detail in Chapter 4 of this book.

The IC comes into the picture when the sales representative needs to execute campaigns by communicating with the customers or possible customers via email or telephone. For example, let's say a company is running some kind of product promotion and has created a campaign to generate product awareness with new and existing customers. First, the company creates the target group based on certain attributes, for example, hobbies, region, and so on. This target group is assigned to the campaign, and the sales representative is asked to call the customers within the target group to raise awareness of the products and discounts that the customer can receive when buying the product. The sales representative generates the call list from the target group and runs the campaign by executing the calls to the customers within the target group. The representative generates the lead based on the customer call acceptance, and those leads are then further converted to opportunities and finally sales. This is one of the examples where IC plays a vital role in executing these tasks.

### 9.1.2 IC Sales

IC Sales covers a wide range of functionality that customer representatives and sales representatives use as part of their day-to-day activities. Most companies cover the following work centers with the IC Agent role (some of which are shown in Figure 9.2): Account Identification, Sales Cycle (leads, opportunities, quotes, contracts, and sales orders), Complaints, Agent Inbox, Product Info, and Reports. IC Sales overlaps with the SALESPRO business role.

IC Sales beings with the creation of leads and then turns them into opportunities. Details regarding configuring leads are covered in Chapter 5, and opportunity details are covered in Chapter 6. After the opportunity is set with the status Won, the customer calls to place an order with the customer service representative. The customer service representative confirms the account and accesses the customer's account history. He then places an order for the customer. While placing an order, the customer service representative searches for the product and can also offer some product proposals (i.e., cross-sell or up-sell). After the order is saved, the confirmation is received by the customer via email or fax.





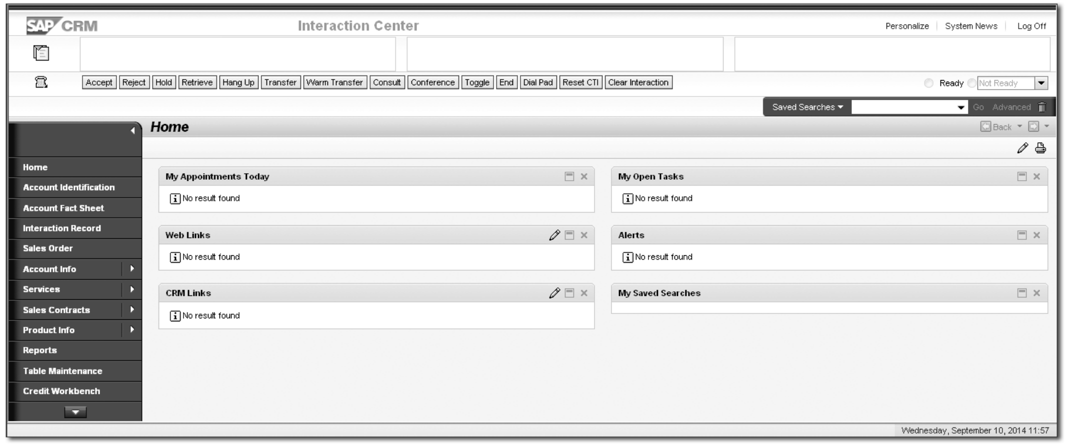



**Figure 9.2** Interaction Center Sales

There are two types of sales orders that customer service representatives can place from the IC WebClient: SAP ERP sales orders or SAP CRM sales orders.

When using SAP ERP sales orders, the orders aren't saved in the SAP CRM database but are stored directly in SAP ERP via the LORD Interface (Lean Order Interface). When creating an SAP CRM sales order, however, the orders are saved in the SAP CRM database triggering middleware replication to SAP ERP. This is shown in Figure 9.3. A detailed configuration and scenario regarding these sales order is covered in Chapter 6.

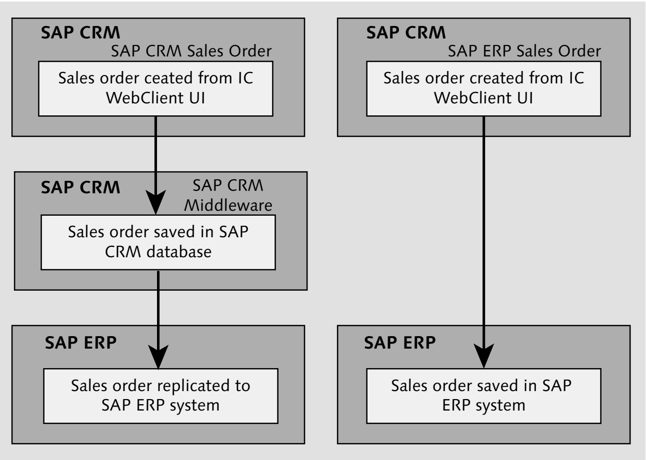



**Figure 9.3** SAP ERP Sales Order and SAP CRM Sales Order

### 9.1.3 IC Service

The IC Service helps an organization conduct and track its service transactions effectively. Real-time communication with service transaction updates results in addressing customer grievances on a timely basis. Customer service is one part of the organization that always has the challenge to keep up with customer complaints and service requests.

To provide optimal customer service, it's imperative to be proactive. Overcoming these problems often results in monetary gains and a good name in the market. Details regarding SAP CRM Service functions, business processes, and configuration are covered in Chapter 7. However, you can perform the following functions with the IC Service:

- **Service order**
  As previously described, a service order is a specific agreed-upon service to be performed between the service recipient and service provider. It allows agents to deep dive into technical analysis of the issue received by the customer and categorize the issue based on multilevel categorization. The service order can have service items, service part items, sales items, or expense items.
- **Service request**
  A service request transaction within IC Service provides the ability to fulfill customer services and track the progress of the service cycle with a service level agreement (SLA). The service request can be used in the shared services scenario, for example, SAP IT Service Management, or it can be used in the customer-facing service scenario, for example, a customer calls for the delivery of the products or nonfunctioning machinery parts. You can dispatch, set up an approval process, maintain categorization, and so on to fulfill the customer service request.
- **Complaints**
  Customers calling for complaints and returns can be logged as complaints in SAP CRM. Complaints have a lot of features. For example, you can categorize complaints based on the customer calls received. This can include late deliveries, over pick, under pick, damaged products, and more. You can assign multilevel categorization to escalate the complaints to different departments and get dollar amount approval. From complaints, you can trigger credit memos, debit memos, free of charge, substitute deliveries, and return requests.





- **Case Management**
  Case Management allows companies to manage complex problems. These can be assigned to different groups that need to be work on and resolve the same issue. Case Management service capabilities include change request management, case processing, and activity processing.
- **Product registration**
  Product registration allows the agent to search an Installed Base (IBase) and Installed Object (IObject). If the product is registered, the confirmed account shows the list of the products bought by the customer on the account identification screen. This helps to go directly to the details of the product that the customer has called for.
- **Knowledge search**
  This allows the agent to identify solutions to known problems and resolve the customer issue on the first call, thereby providing maximum customer satisfaction.

The IC allows companies to maintain core areas of SAP CRM while taking advantage of the many features provided by the IC application. In the next two main sections, we'll look at two integrations that can be performed in the IC: Computer Telephony Integration and Multichannel Integration.

## 9.2 Computer Telephony Integration

Computer Telephony Integration (CTI) involves connecting an organization's telephone system to the application software to automate call center functions in order to reduce the call cycle time. Sales representatives get the account information readily available on their screen without browsing through the different application screens.

CTI is a technology that has CMS sitting on the Private Branch Exchange (PBX)/ Automated Call Distribution (ACD) switches. The CTI system setup can be different for different vendors. Some of the advantages of using the CTI include the following:

- Faster connections for customer service to a specific customer's information in SAP CRM, reducing wait time and total handle time.

- More complete customer interaction history in SAP CRM, enabling improved customer experiences based on visibility of the last interaction and complete history.
- Analytics capability through linking the caller ID with the interaction record. This gives a complete view of the call being made and linkages of all the transactions executed for the customer during the call. Customer service and managers can access this information in real time.

### 9.2.1 Business Functions

Before going through some of the key telephony integration points, let's look at some telephony functions:

- **Queuing**
  Queuing is most commonly referred to as waiting in line to get someone to answer your call. For heavy inbound calls, the call wait time increases, and sometimes telephony systems direct you to leave your number for the call back option. Queues are managed by ACD, which, as mentioned previously, is a component of the CTI system. It helps you pass the call to the right agent and manage the queues based on the rules set up in the CTI system.
- **Call treatment**
  Call treatment is also managed by ACD. As soon as a call is received, ACD decides what to do with the call, that is, whether to send it to *Interactive Voice Response (IVR)* or send it to on hold.
- **Routing**
  Routing customer calls to the right agent is imperative to get the customers serviced properly. ACD also manages the call routing based on the service skill group or the multichannel routing, and so on.

With CTI, certain telephony functions can be carried out in the IC. These functions work as screen popups and include the following:

- **Automatic Number Identification (ANI)**
  ANI is used to identify an account based on the caller's telephone number. The account identification is only successful when the information on the customer master record in the SAP CRM system matches with the caller's telephone number. This approach is tedious because the caller's telephone number isn't always the same as the one maintained in the customer master record. Therefore, the success rate isn't very high in this case.
- **Dialed Number Identification Service (DNIS)**
  DNIS is a functionality that helps route the call to the right agent based on a 1-800 number. Let's say Company ABC is running some kind of promotion or a campaign to launch a new product. For this reason, the company has assigned a specific 1-800 number, which will route the call to the specific skill group. Therefore, anybody calling this number will be routed to the right agent, and the customer information is populated on the screen with the caller number.
- **Interactive Voice Response (IVR)**
  Presently, many companies have implemented IVR to get a successful account identification as compared to others such as ANI for which the success rate is very low. IVR provides enough key information about the caller to determine who is calling and identify the caller's account within SAP CRM.
- **Call Attached Data (CAD)**
  Information gathered from the IVR is collected in the CAD, which is then used to identify the account on the ACCOUNT IDENTIFICATION screen. In the IC, it's possible to identify a customer by extracting the customer's account ID from the CAD.





### 9.2.2 SAP Business Communications Management

SAP provides its own CMS that offers CTI functions: *SAP Business Communication Management (SAP BCM)*.

SAP BCM is used to connect customers with the right agent. The communication between a customer and company agent can be through different channels such as email, phone, or fax. Figure 9.4 shows the SAP BCM and SAP CRM integration architecture. In other words, SAP BCM is a contact center solution that helps organizations connect with customers rapidly and resolve their issues with quality and target costs. The communication can be inbound or outbound.

Following are some of SAP BCM's capabilities:

- Voice Over IP (VoIP) telephony service
- Unified multichannel contact routing
- Voicemail and messaging services

- Presence and directory services
- Call recording and contact history services
- Online monitoring and analysis tool
- Consolidated administration, management, and control
- Softphone, IP desk phone, and mobile clients
- Deep SAP business context integration through open interfaces

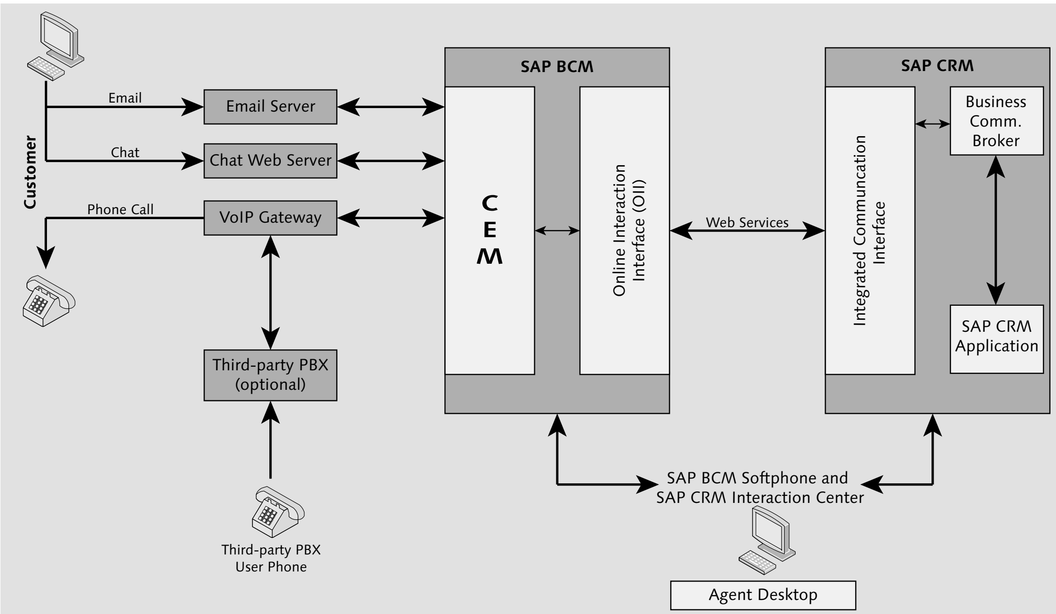



**Figure 9.4** SAP BCM and SAP CRM Integration Architecture

### 9.2.3 Third-Party Computer Management Software

Besides SAP BCM, there are different third-party, SAP-certified CMS vendors, including Genesys, I3, Avaya, and Cisco, which can be connected to SAP CRM via the *SAP CRM Integrated Communication Interface (SAP CRM ICI)*. Similar to SAP BCM, these CMSs support multichannel integration and enable a 360-degree view of customers.

To get a better idea of what a third-party vendor provides, let's look at Genesys as an example. Genesys has a bolt-on called Gplus Adapter that is considered one of the leading multichannel integrations for email, phone, and fax routing capabilities.





Genesys Gplus Adapter is an SAP-certified solution that integrates Genesys' real-time interaction solutions. In the next section, we'll use Genesys as an example system for configuring the CTI integration.

### 9.2.4 Configuring the Computer Telephony Integration

In this section, we'll look at the steps involve in configuring the external CTI system with the SAP CRM IC WebClient. Follow these steps:

1. Maintain the CMS profile via the SAP CRM configuration by navigating via the menu path, Customer Relationship Management • Interaction Center WebClient • Basic Functions • Communication Channels • Define Communication Management Software Profiles. Add the entries, as shown in Figure 9.5.

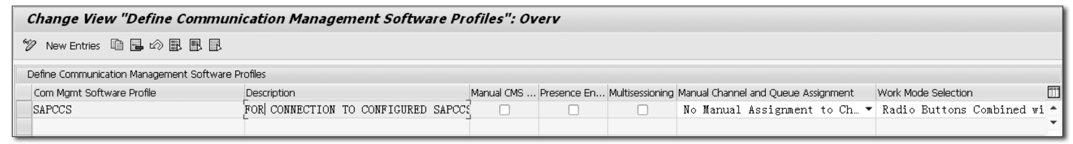



**Figure 9.5** Define Communication Management Software Profile

2. Next, maintain the CMS connections by following the menu path, Interaction Center • Interaction Center WebClient • Administration • Communication Management Software • Interface Settings • Maintain Communication Management Software Connections. As shown in Figure 9.6, enter the Comm. Mgmt Software System ID, which for our example is "GENESYS".

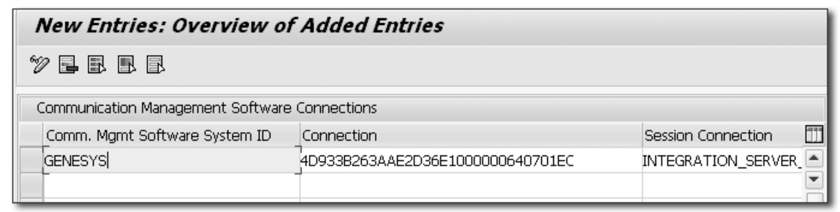



**Figure 9.6** Communication Management Software Connections

3. Navigate to Interaction Center • Interaction Center WebClient • Administration • Communication Management Software • Maintain System Settings. In Figure 9.7, maintain the system settings for CMS, including the channels you want to integrate, for example, telephone, email, chat, and so on. Figure 9.8

shows the configuration to maintain the MAIL E-MAIL and PHONE TELEPHONY channels.

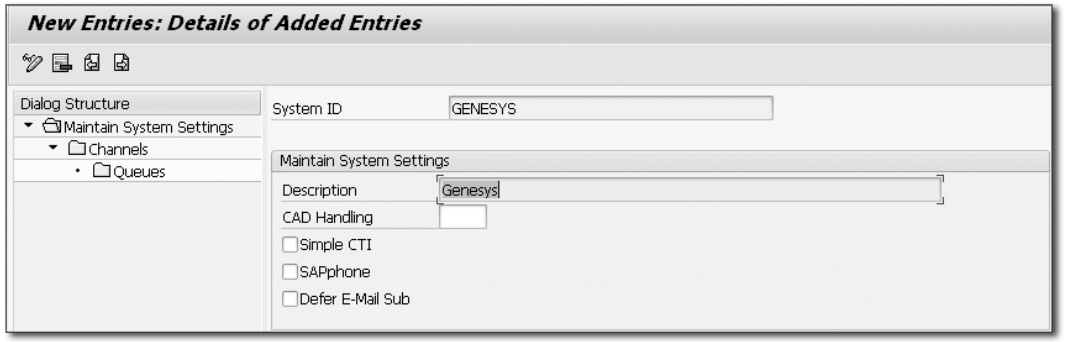



**Figure 9.7** Maintain System Settings

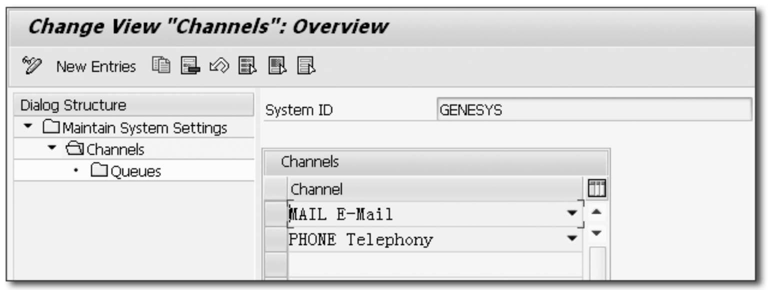



**Figure 9.8** Maintain Channels for the CMS

4. Again, assign the COMMUNICATION MANAGEMENT SOFTWARE SYSTEM ID to the CMS profile via the menu path, INTERACTION CENTER • INTERACTION CENTER WEBCLIENT • ADMINISTRATION • COMMUNICATION MANAGEMENT SOFTWARE • ASSIGN PROFILES (see Figure 9.9).

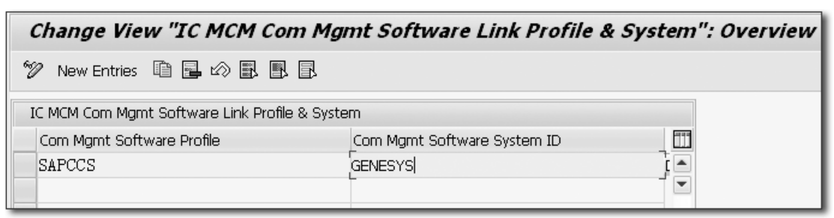



**Figure 9.9** IC Communication Management Software Linking the Profile and System





5. Assign the CMS profile created to the function profile CONTACTCENTER, as shown in Figure 9.10. Navigate to CUSTOMER RELATIONSHIP MANAGEMENT • UI FRAMEWORK • BUSINESS ROLES • DEFINE BUSINESS ROLE.

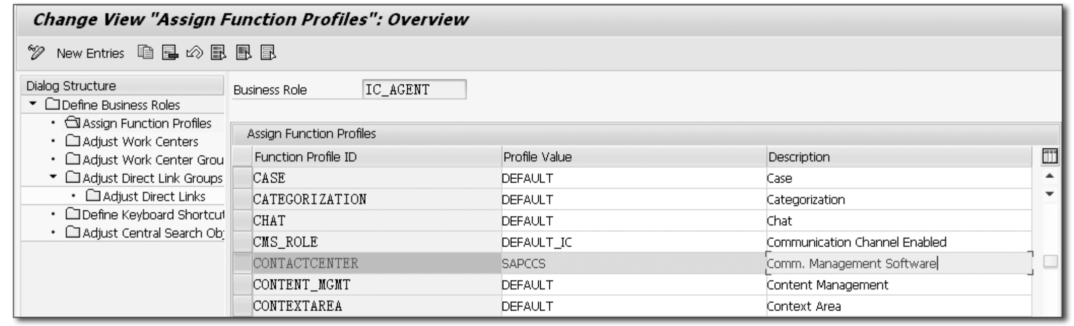



**Figure 9.10** Assigning Function Profile CONTACTCENTER

In this section, we've discussed the various features and functions that CTI provides. In addition, we looked at SAP's CMS option, which includes SAP BCM and third-party vendors such as Genesys. These can be used to connect SAP CRM via SAP CRM ICI and Business Communication Broker (BCB) to integrate CTI functionality. Finally, we walked through the configuration steps for connecting SAP CRM to CTI using Genesys as the CMS. Next we'll look at the second type of integration possible in the IC.

## 9.3 Multichannel Integration

In addition to using the telephone as a form of communication integration, SAP CRM can also be integrate with other communication channels with the help of CMS. In this section, we'll look at multichannel integration for email, fax, letter, SMS, and web chat.

### 9.3.1 Email

Apart from telephone use, email has become a primary communication channel for organizations. In an environment where customer care on phones isn't feasible, customer communication is highly based on email or fax. Email integration in SAP CRM can be done in two ways:

- **Pull email**
  Figure 9.11 shows the email flow via SAP CRM ICI and SAPConnect. In the pull email mechanism, whenever email is routed via SAPConnect, it goes to the agent group inbox based on the workflow and routing rules within the Email Response Management Service (ERMS). The IC agent then accesses the inbox to pull the emails and work on the issue.

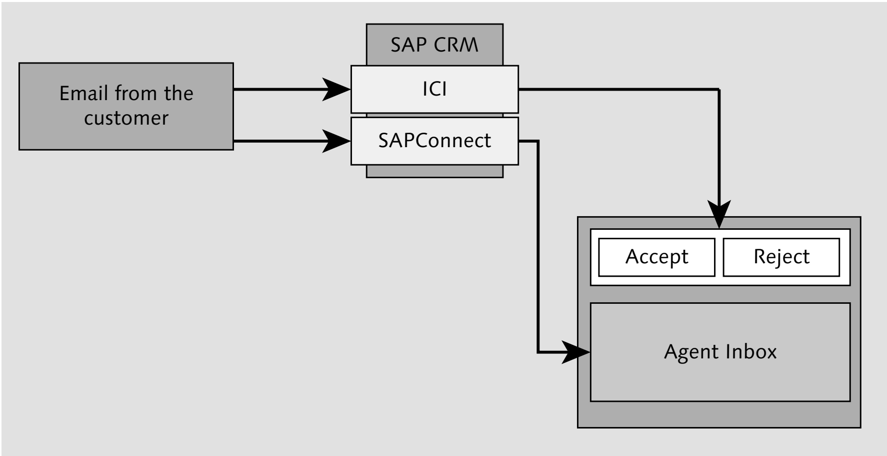



**Figure 9.11** Email Flow to the SAP CRM System

- **Push email**
  In the push email mechanism, when the email flows through CMS, which connects the SAP CRM system via SAP CRM ICI, the email shows as accepted or rejected on the Account Identification screen of the IC agent. When the agent accepts the email, a screen pops up, and the account information is populated accordingly.

When working through SAPConnect, the email flow is as follows:

1. Email is received from the email server that is connected to SAPConnect.
2. This triggers the inbound flow distribution (i.e., dispatching email to the workflow).
3. Workflow routes the email as a work item to the IC agent.
4. ERMS triggers in to route the email to the agent inbox.
5. The agent inbox receives the email to be worked on.





Figure 9.12 shows the email interaction with the SAP CRM system where you can see one other ERMS diverting the email to SAP CMS as ERMS push emails.

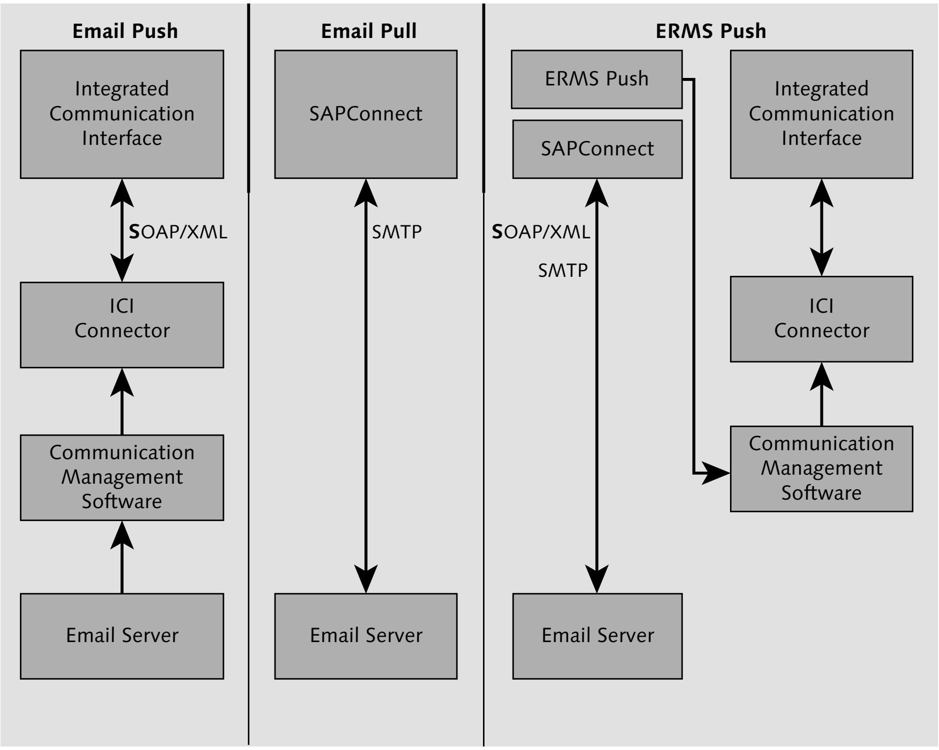



**Figure 9.12** Email Interaction within SAP CRM

**Agent Inbox**

Refer to SAP Note 882653 (Frequently Asked Questions (FAQs) about the Agent Inbox) to understand some of the key concepts of the email flow to the agent inbox. SAP Note 455140 (Configuration of Email, Fax, Paging, or SMS Using SMTP) provides you with the configuration steps to set up SAPConnect.

### 9.3.2 Fax, Letter, and SMS

Like email, fax, letter, and Short Message Service (SMS) can be integrated with CMS or SAPConnect. The IC can communicate with these different channels. SAPConnect can be connected with the fax server, which is then routed to the IC agent inbox using SAP workflow similar to the previously described email flow. When using SAP CRM ICI, the faxes are pushed to the IC agent, which results in the screen popup.

Letters aren't very widely used in the day-to-day business environment. The process of pushing letters into the SAP CRM system is a bit different from any other communication channel. When a letter is received from the customer, someone from the company has to scan that letter physically and run the *ArchiveLink* scenario (Transaction OAWD). The ArchiveLink scenario uses the workflow to create the work items and push them to the IC agent group box. These are categorized as letters so that the IC agent can pull these to work on them.

SMS can also be integrated with SAP CRM IC as one of the communication channels. SMS can also be received via SAPConnect just like email via SAP CRM ICI.

### 9.3.3 Web Chat

*Web chat* is growing in industries where immediate interaction is a key to solving customer issues. Although this communication channel isn't widely used due to social media awareness, people are more into communicating with messenger services. The IC does provide the capability to accept web chats from customers and reply to address their concerns.

You can also leverage the *interactive scripting* functionality with the web chat. Based on the issues, you can have the text reader available to reply back to the customer. The IC provides the capability for one agent to chat with multiple customers at the same time.

In this section, we discussed the multichannel communication integrations that can be employed with the IC, as well as provided an overview of how these channels can be integrated to SAPConnect or SAP CRM ICI.

## 9.4 Account Identification and Account Fact Sheets

IC agents can view the account details when a customer calls via the Account Identification screen. After a customer account is created, an account fact sheet is made available allowing the IC agents to get an overview of their customers.





In this section, we'll discuss account identifications and account fact sheets, along with the steps involved in their creation and configuration.

### 9.4.1 Account Identification

As previously stated, IC agents have the ability to review account details when a customer calls in by confirming the account on the Account Identification screen. Most companies have requirements to confirm multiple partners. In these scenarios, you need to configure the account identification profile for multiple business partners. After the account is confirmed, the accounts are carried over to the business transaction automatically until the call ends.

Account searches are carried out for the following scenarios:

- Business-to-business (B2B)
- Business-to-consumer (B2C)
- Mixed B2B and B2C
- Employee

Figure 9.13 shows the Account Identification screen for the single account, which shows the confirmed account. The Result List shows the IBase ID and IObject ID. Based on your configuration of the object component, you can display the list of the IBase or IObject associated with the customer. This helps to directly drill into the product the customer bought and the issue in question, which helps the service representative service the customer appropriately when on a call.

Figure 9.14 shows the customer account details on the Account Identification screen. The overview consists of Contacts, Addresses, Installed Base, History, Related Partners, Objects, and Communication. You can drill into each of these objects and see the details on the right side of the screen.

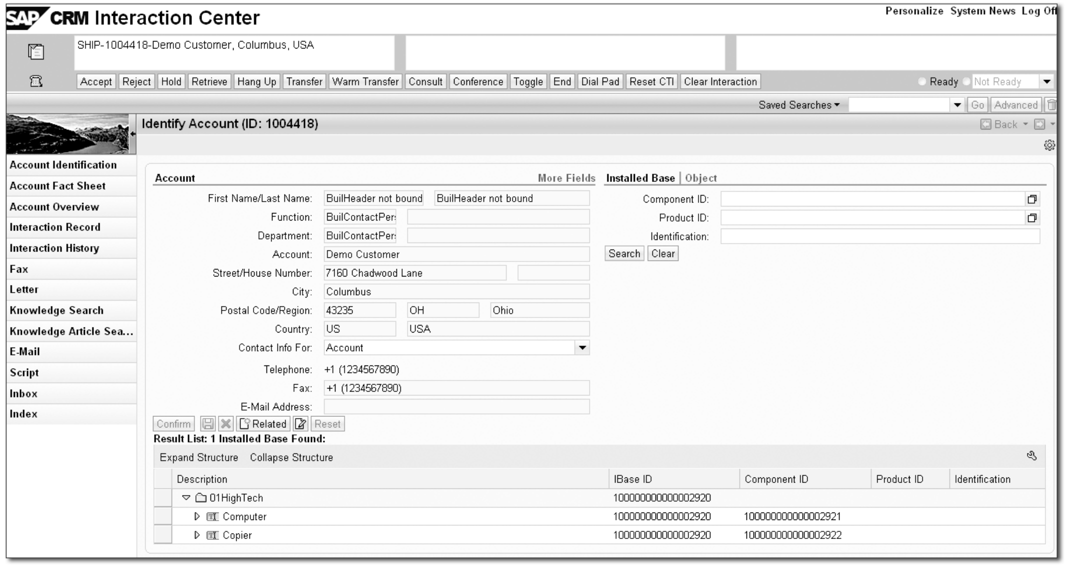



**Figure 9.13** Account Identification Screen

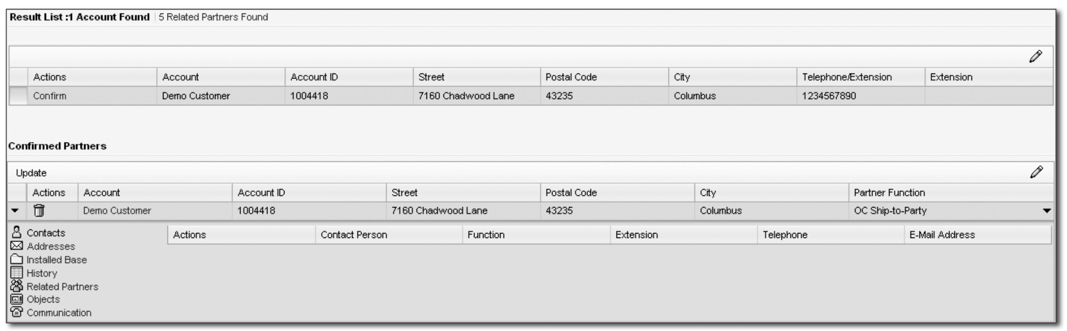



**Figure 9.14** Result List and Briefcase

Figure 9.15 shows the multiple Account Identification screen wherein the ship-to and sold-to parties are confirmed. The Result List shows the Confirmed Partners.





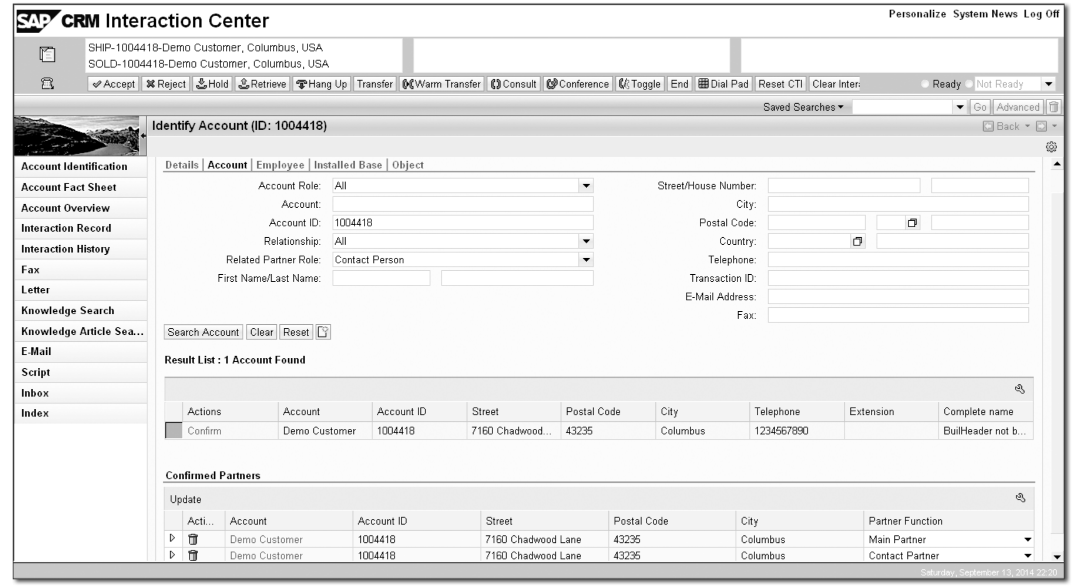



**Figure 9.15** Multiple Account Identification

Let's now go through the configuration steps required to set up the account identification functionality for multiple partners. Follow these steps:

1. Use the following menu path to configure the Account Identification Profile: Customer Relationship Management • Interaction Center WebClient • Master Data • Define Account Identification Profiles for Multiple Business Partners.
2. Figure 9.16 shows the Account Identification Profile Details view with the CAD Application ID and XSLT File that allows you to connect with the IVR system. If you maintain the CAD Application ID name and XSLT File, it allows you to use the contact's attached data from the IVR system to identify the account. All the available XSLT tags and attributes are listed and explained in the sample XSLT program CRM_IC_BPIDENT_EXT_IAD_TO_ABAP.
3. Figure 9.17 shows the Auto Continue functionality that can be activated for different channels. If you activate the Continue check for any of the channels, the confirmation is automatically performed as soon as the unique accounts are found.

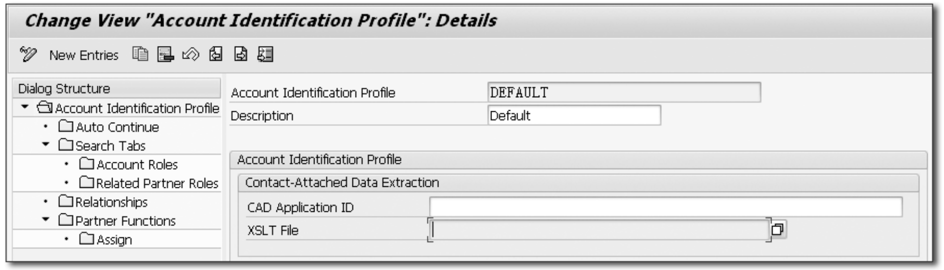



**Figure 9.16** Account Identification Profile

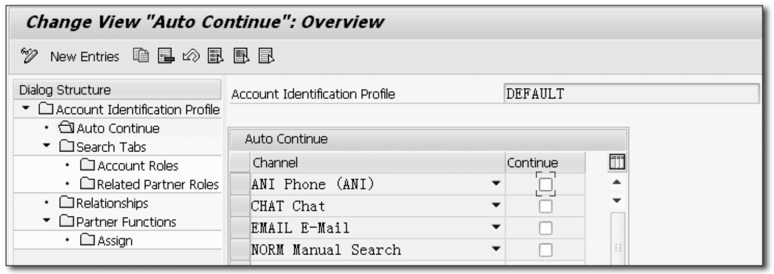



**Figure 9.17** Auto Continue

4. Figure 9.18 shows the Search Tabs that are available on the Account Identification screen. As shown, there are five tabs available: Details, Account, Employee, Installed Base, and Object). If your business scenario doesn't require IBase and Object tabs, you can remove the configuration as shown in Figure 9.18.

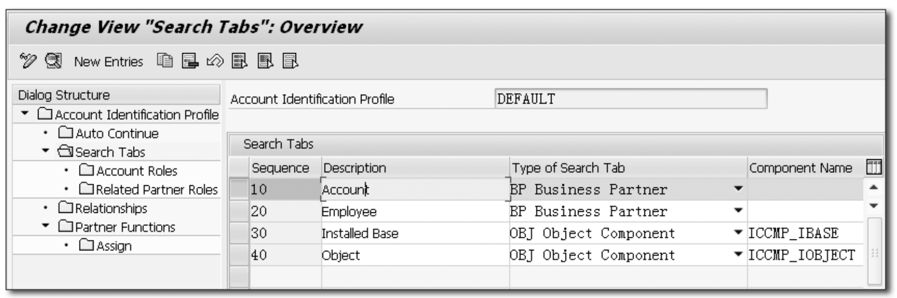



**Figure 9.18** Search Tabs

5. The Change View "Search Tabs": Details screen allows you to define the account identification scenarios, such as B2B, B2C, or Employee (see Figure 9.19). You can also activate Find Related Partners Automatically and activate the account from the Account Identification screen.

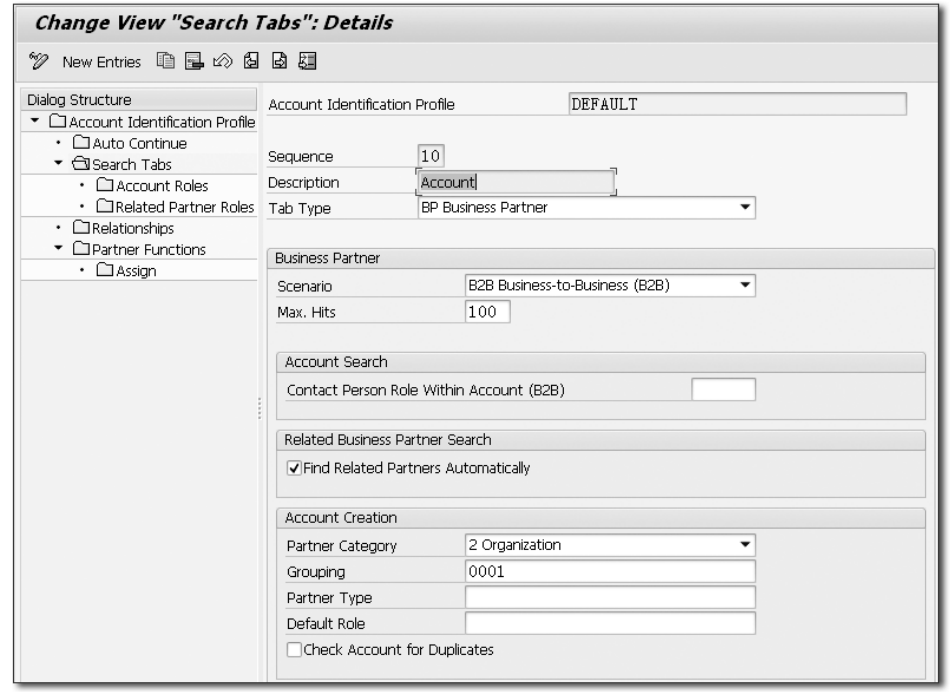



**Figure 9.19** Search Tab Details

6. Figure 9.20 shows the Account Roles configuration, where you can add the account role; those accounts can be searched on the Account Identification screen. The ship-to party isn't listed in Figure 9.20; if you try to search for ship-to, it won't return any account.
7. Figure 9.21 shows the Related Partner Roles configuration. The Related Partner Roles field on the Account Identification screen comes with this configuration.

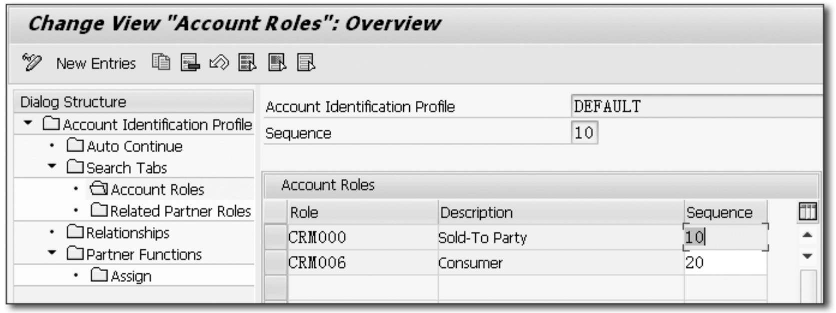



**Figure 9.20** Account Roles


**Figure 9.21** Related Partner Roles

8. Figure 9.22 shows the Relationships configuration, which depicts the relationship of the confirmed partner in the result list. Based on this configuration, the result list on the Account Identification screen shows related partners.

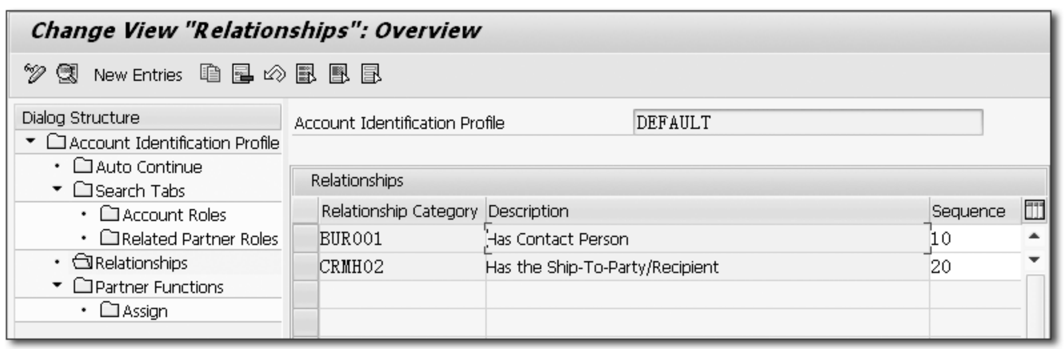



**Figure 9.22** Relationship within Account Identification





After the account is confirmed, you see the list of the accounts with the partner functions (Figure 9.23) in the Confirmed Partners section below the result list in the Account Identification screen.

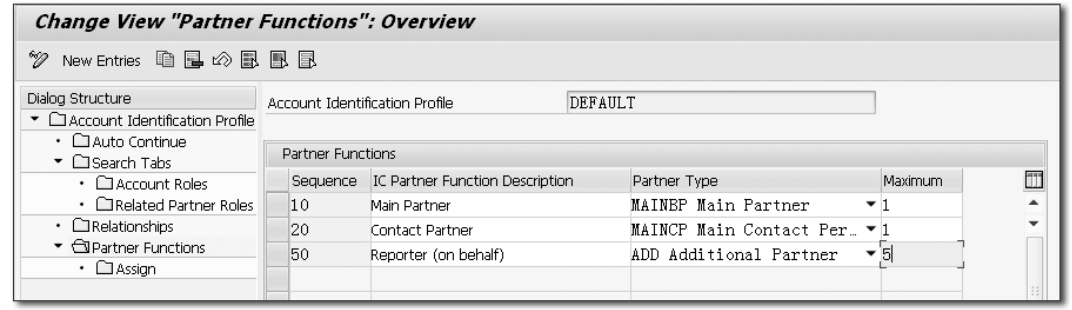



**Figure 9.23** Partner Functions within Account Identification

9. The last step in the configuration is to assign the Account Identification Profile to the Function Profile ID BPINDENT_MULTIPLE, as shown in Figure 9.24.

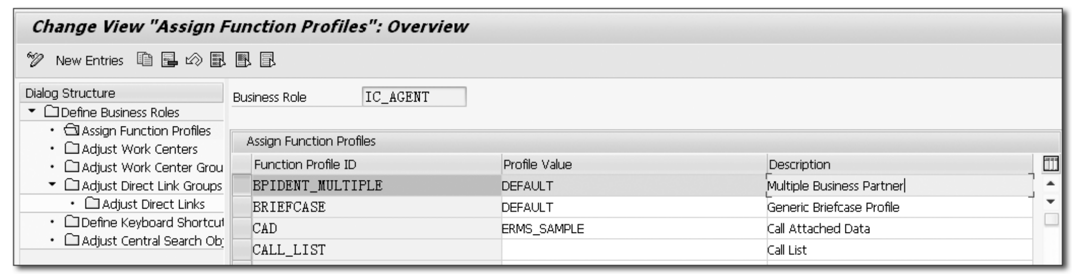



**Figure 9.24** Assign Function Profile in the Business Role

### 9.4.2 Account Fact Sheets

The account fact sheet provides an overview of customers as well as a condensed view of the data based on your specific business needs. Account fact sheets provide key information that customer service representatives should know before interacting with the customer.

The information on the account fact sheet is listed as a part of the assignment block. This means every view on the fact sheet shows that the assignment block and fact sheet can be launched from the account overview screen, as shown in Figure 9.25. The MORE button on the account overview for the fact sheet is available with the UI PFCG role SAP_CRM_UIU_SLS_PROFESSIONAL. You can copy this UI PFCG role and assign it to your business role.

The information on each fact sheet view can be pulled from different systems or the same system. It can be pulled from SAP BusinessObjects BI, SAP ERP, SAP CRM, or SAP Supply Chain Management (SAP SCM). These can be in the form of master data or transactional data.

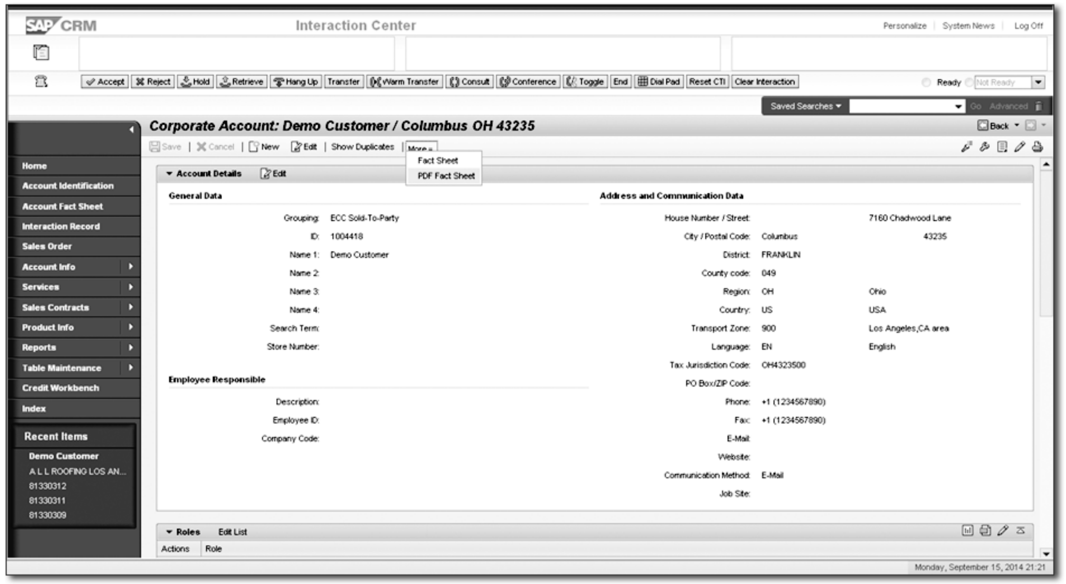



**Figure 9.25** Account Overview with Fact Sheet Option

We'll now discuss the steps involved in configuring account fact sheets; you can change or copy the configuration based on your specific requirements. For our purposes, we'll use a standard fact sheet example BP_ACCOUNT_FS. Follow these steps to configure the fact sheet:

1. Review the views or create a new view based on your requirements to pull the data from the other systems. Figure 9.26 shows the different views for the BP_FACTSHEET component that can be accessed via Transaction:BAP_WD_CMPWB. You can configure the fields on each of views that you want to see on the fact sheet.





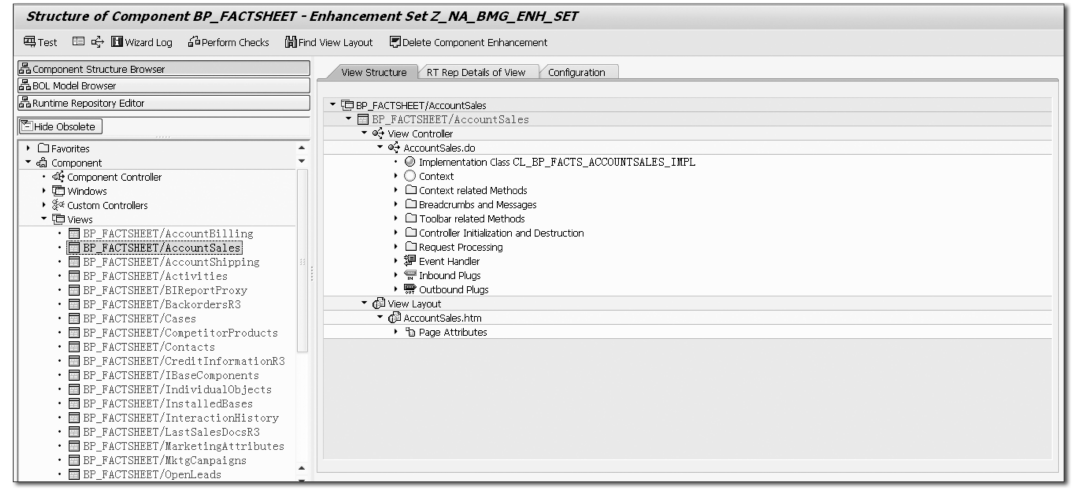
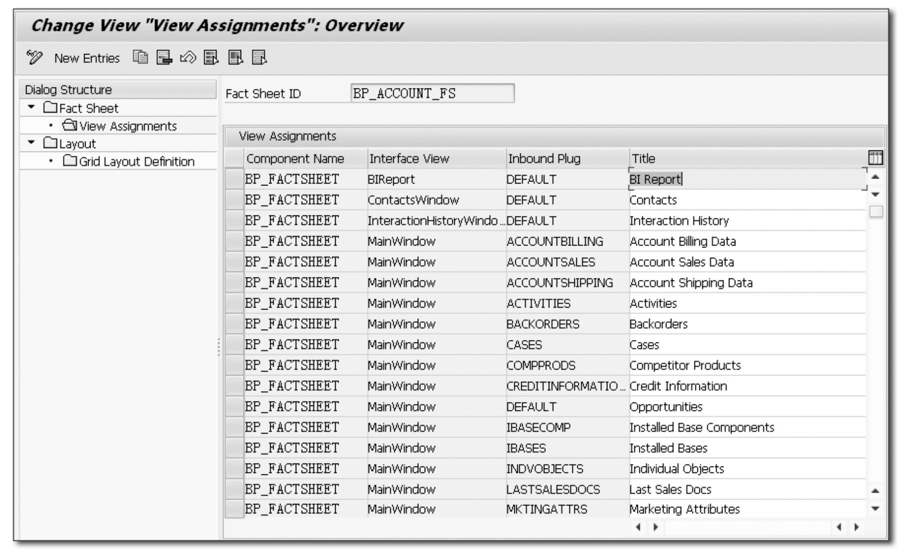



**Figure 9.26** Maintaining Fact Sheet Component Views

2. Add the entry of that view if it doesn't exist in the configuration path, CUSTOMER RELATIONSHIP MANAGEMENT • UI FRAMEWORK • UI FRAMEWORK DEFINITION • FACT SHEET • MAINTAIN FACT SHEET. You can create the new FACT SHEET ID and assign the views to the customer FACT SHEET ID. Figure 9.27 shows the view examples from BP_FACTSHEET.




| Component Name | Interface View | Inbound Plug | Title |
|---|---|---|---|
| BP_FACTSHEET | BIReport | DEFAULT | BI Report |
| BP_FACTSHEET | ContactsWindow | DEFAULT | Contacts |
| BP_FACTSHEET | InteractionHistoryWindo... | DEFAULT | Interaction History |
| BP_FACTSHEET | MainWindow | ACCOUNTBILLING | Account Billing Data |
| BP_FACTSHEET | MainWindow | ACCOUNTSALES | Account Sales Data |
| BP_FACTSHEET | MainWindow | ACCOUNTSHIPPING | Account Shipping Data |
| BP_FACTSHEET | MainWindow | ACTIVITIES | Activities |
| BP_FACTSHEET | MainWindow | BACKORDERS | Backorders |
| BP_FACTSHEET | MainWindow | CASES | Cases |
| BP_FACTSHEET | MainWindow | COMPPRODS | Competitor Products |
| BP_FACTSHEET | MainWindow | CREDITINFORMATIO... | Credit Information |
| BP_FACTSHEET | MainWindow | DEFAULT | Opportunities |
| BP_FACTSHEET | MainWindow | IBASECOMP | Installed Base Components |
| BP_FACTSHEET | MainWindow | IBASES | Installed Bases |
| BP_FACTSHEET | MainWindow | INDVOBJECTS | Individual Objects |
| BP_FACTSHEET | MainWindow | LASTSALESDOCS | Last Sales Docs |
| BP_FACTSHEET | MainWindow | MKTINGATTRS | Marketing Attributes |

**Figure 9.27** Maintaining the Fact Sheet

3. Configure the fact sheet component BSP_DLC_FS by going to Transaction BSP_WD_CMPWB and selecting the view BSP_DLC_FS/FACTSHEET. Figure 9.28 shows the fact sheet configuration where you can choose your custom fact sheet or select the existing fact sheet, for example, ACCOUNT FACT SHEET BP_ACCOUNT_FS, and create the new configuration with your business role configuration key (ROLE CONFIG. KEY).

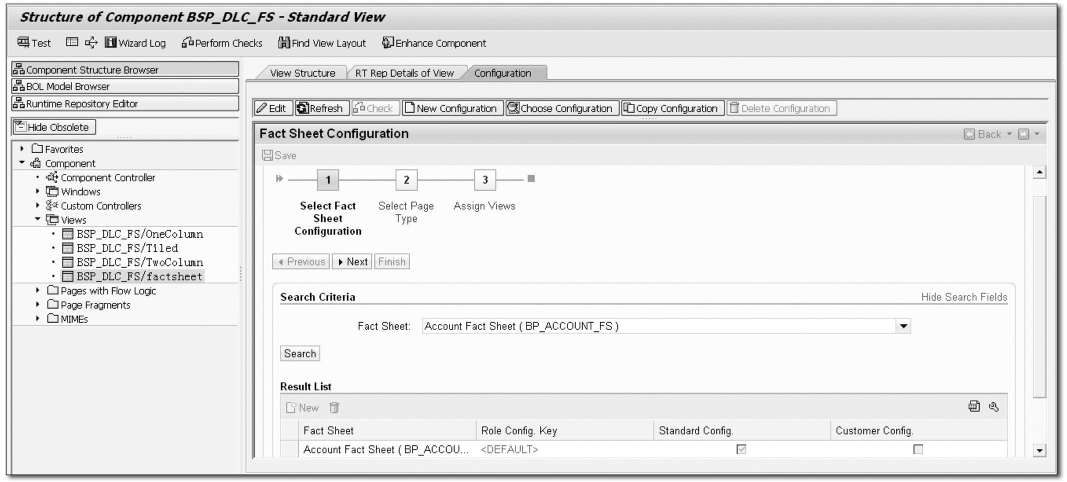



**Figure 9.28** Fact Sheet Configuration

4. Select the fact sheet and click the NEXT button to select the page type. After you've selected the page type, click NEXT again to assign the existing views to the fact sheet.
5. Figure 9.29 shows the AVAILABLE FACT SHEET VIEWS and ASSIGNED FACT SHEET VIEWS lists. Within the ASSIGNED FACT SHEET VIEWS, you can access the configuration to add or remove the view fields based on your specific requirements.

In this section, we discussed the account identification overview and account fact sheet concept. We walked through the configuration steps involved in creating both. In the next section, we'll look at interaction records.





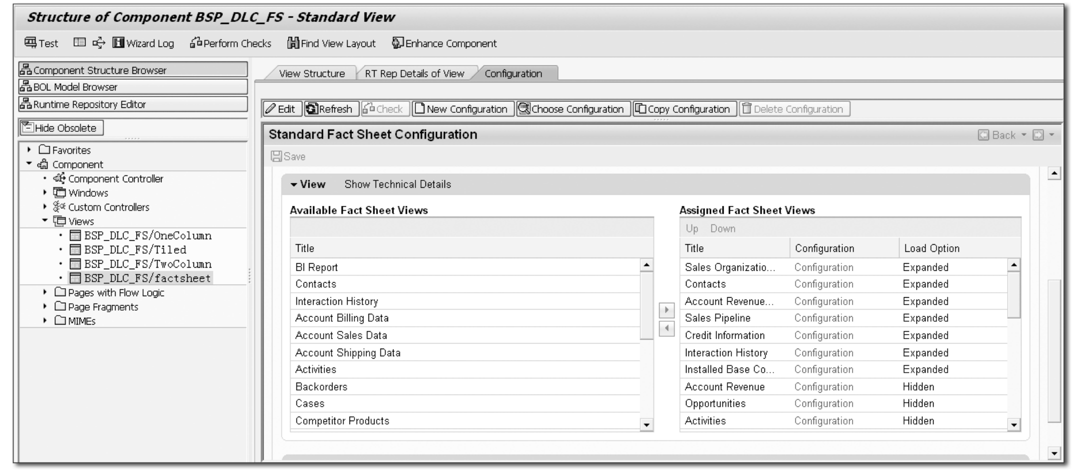



**Figure 9.29** Fact Sheet Views

## 9.5 Interaction Records

An interaction record logs all of the interactions that have taken place between a customer service representative and customer while on a call. Any transaction placed during a call with the customer is logged into the interaction record under the activity clipboard. This becomes a basis to fetch the report based on the call received. In addition, you can get the call time report from other reports, but the interaction record gives you more specific details related to the call with the customer.

Interaction records are a central navigation point in the IC, and SAP highly recommends avoiding switching off this functionality because it's core to IC capabilities. After the call is completed and the customer service representative ends the call, an interaction record is saved with all the necessary information that has been executed during the call.

Figure 9.30 shows the INTERACTION RECORD screen with some details such as the ACTIVITY CLIPBOARD with the customer and transaction attached to it executed during the call with the customer. Some of the last interactions can be viewed from the INTERACTION RECORD screen as well.

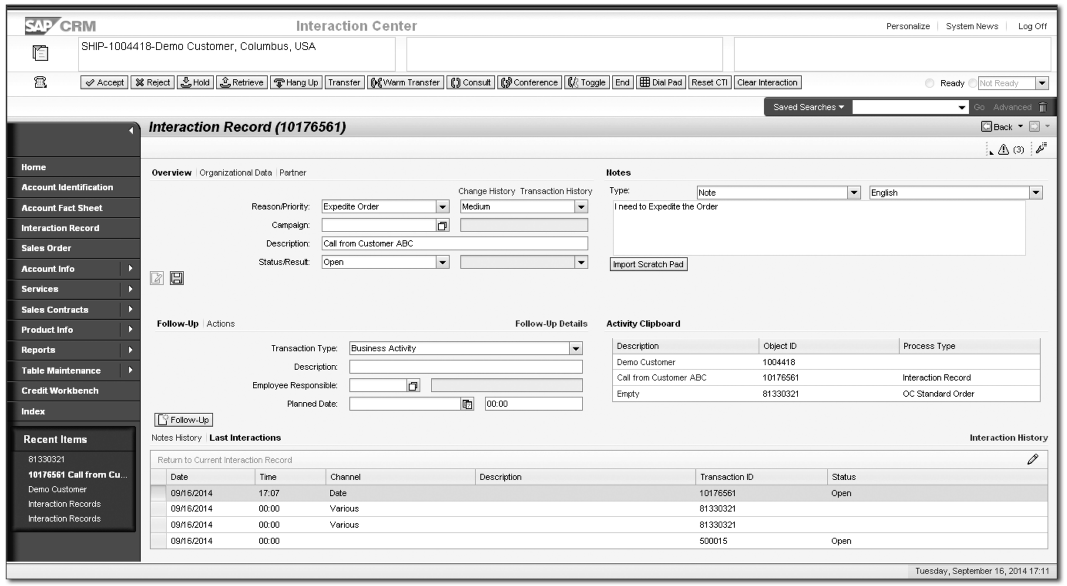


**Figure 9.30** Interaction Record

> **Note**
>
> SAP has provided BAdI CRM_IC_IARECORD that can be used to suppress the creation of the interaction record. See SAP Note 828402 BAdI of Interaction Record, for more details.

## 9.6 Agent Inbox

The agent inbox helps the customer service representative work on incoming items, such as incoming calls, emails, faxes, and so on, and respond to the customer to solve any issues and answer any queries.

From the agent inbox, customer service representatives can view all of the business transactions and work items assigned to their respective group. This helps them pull these work items on their name and resolve the issues in a timely manner. The agent inbox can also be used for IC Marketing functions, for example, running planned activities created from the call list, contacting leads to convert them to opportunities, and later triggering some sales out of the leads. Figure 9.31 shows the agent Inbox screen with various selection criteria and the Result





List. The business role is IC_AGENT where the inbox is readily available. You can copy the IC_AGENT business role to suit your specific needs.

The Search Criteria consists of Main Category, which includes the transactions that you want to search; Status, Time Period, Object ID, Assigned To, Description, Date Type, Priority, Account, and From/To date.

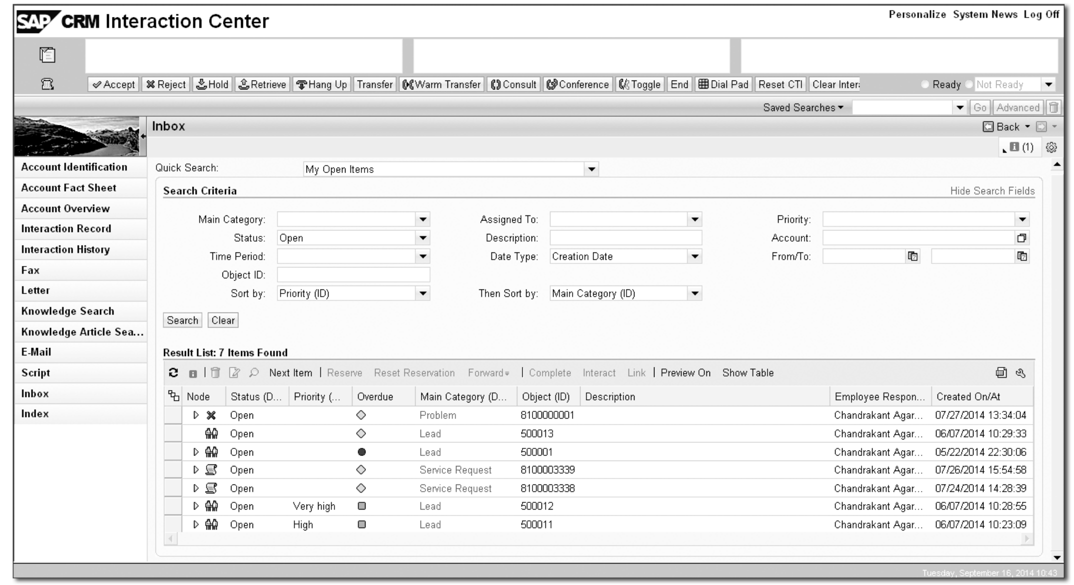


**Figure 9.31** Agent Inbox

The search Result List includes the Node, which shows the link of a specific transaction to the different transactions in the tree structure; Status; Priority; and Overdue, which shows the status of the item being red, yellow, or green based on whether the work item has missed an SLA, object ID, description, employee responsible, and so on.

### 9.6.1 Business Functions

The following are some functions that customer service can perform from the agent inbox:

- **Emails, faxes, and scanned letters**
  Organizations receive complaints, orders, or any other service request via

emails, faxes, or scanned letters. These get stored in SAP CRM as a transaction, which is assigned to the customer service representative's group. This can be done through the routing rules based on organization-specific needs. Customer service representatives can pull these emails, faxes, and scanned letters in their agent inbox and work on those items to resolve them within the SLA specified on each of the transactions.

- **Work items**
  You can process all the work items (i.e., SAP and any of your custom work items in the agent inbox). Some examples of customer work items can be the creation of the backoffice work items and tasks for issues such as an incomplete-tion log, under/over-DELIVERY, back order exceptions, or any kind of other exception that customer service representatives should work on to resolve customer issues.
- **Business transactions**
  You can pull any of the business transactions in the agent inbox, for example, sales orders, sales contracts, service orders, confirmations, and so on.
- **Advanced warning for due date**
  Customer service representatives can view their work items that are nearing their SLAs. These items are marked with a yellow STATUS Indicator in the OVERDUE column. This is termed as advanced warning for due dates.

### 9.6.2 Configuring the Agent Inbox

For the purposes of example, let's consider a business scenario where we create a work item that shows up on the agent inbox screen to resolve a customer issue by communicating with the customer.

Let's say that a customer sends an email with information to place an order, but he forgets to mention in the email whether the product ordered is a customer pick up or should be delivered by an organization. This is controlled via the shipping condition on the sales order. In this case, the customer service representative places an order and puts the order on delivery block. This creates the work item in the form of a task where customer service should contact the customer and confirm the shipping conditions on the sales order.





This process plays out as follows:

1. An order is created with all information from the email received by the customer service representative except the shipping condition piece, so the order is placed on the delivery block (see Figure 9.32).

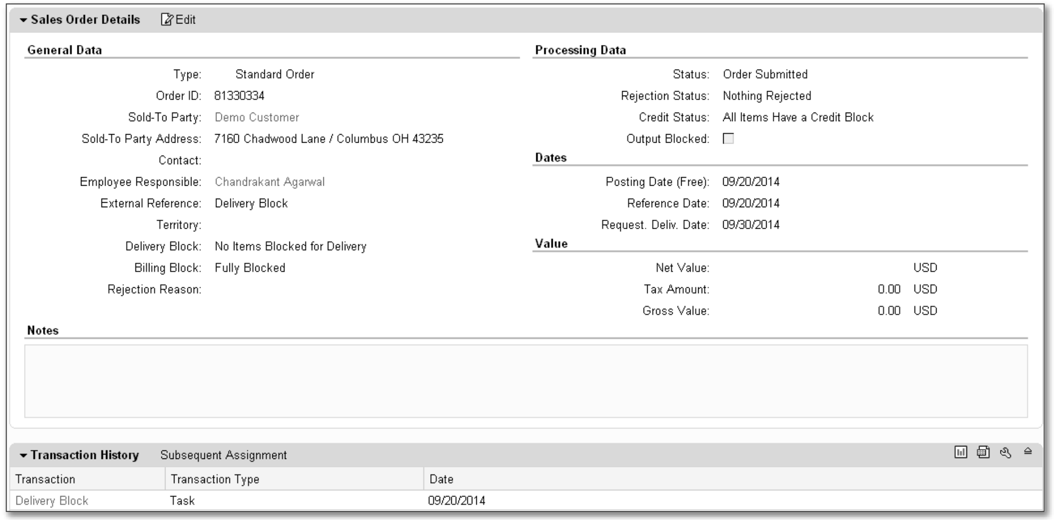



**Figure 9.32** Order Created with Delivery Block

2. As soon as the order is placed on the delivery block, the task is created and routed to the service skill group. This functionality can be achieved by configuring the actions to trigger the task based on the scheduled condition in status for delivery block. The routing rule can be configured with the rule modeler functionality covered in Chapter 4. You can implement routing rules based on your specific needs and the customer master attribute.
3. Figure 9.33 shows the DELIVERY BLOCK TASK created and assigned to the sales order. The task is assigned to the skill group; the skill group has multiple employees assigned to it as well. Any of the employees can yank the task on their name and call the customer to get the specific information on the shipping condition.

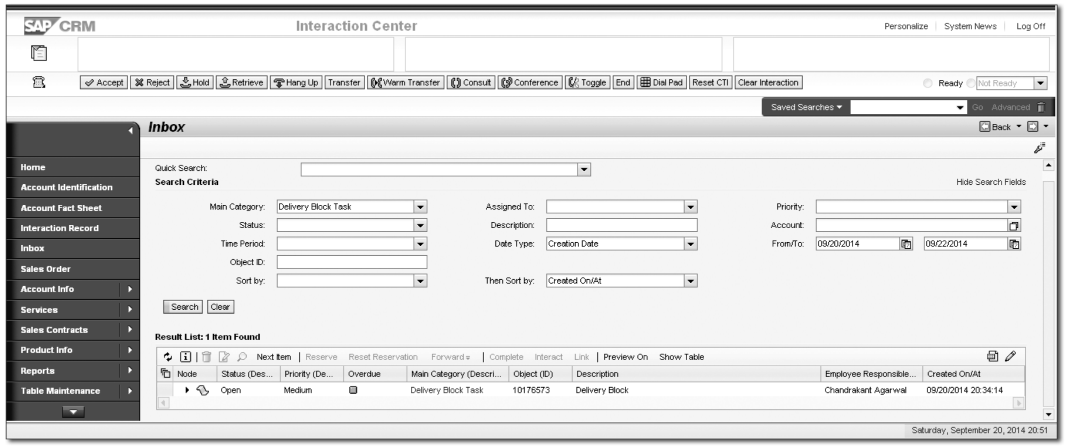



**Figure 9.33** Agent Inbox Showing the Delivery Block Task

After the employee receives the information, he can update the order and close the task. You can also assign a SLA to the task so that you can monitor the high-priority issues more closely. The Overdue column helps you identify those tasks that are nearing their SLA.

## 9.7 Business Transaction Routing

Business transaction routing helps an organization assign the appropriate skill group to work on an SAP CRM business transactions. This can be done manually or automatically. When business transactions are created, mostly service transactions, these transactions can be escalated to different groups based on the category listed. The category is based on the customer calls received; for example, if a customer calls an organization saying that the product purchased isn't up to the standard quality, this would be pushed to a service skills group to escalate this issue to the quality control department. In this case, you can either manually escalate the issue to the quality control department or configure the routing rules to escalate the issue to the quality control department based on the transaction category. In either case, the quality control team then views the service transaction in its inbox and takes the necessary action.

In SAP CRM, the *rule modeler* is used to execute the automatic routing and consists of various contexts. A context is a group of related attributes, operators, and





actions that support a particular scenario or process, such as Email Response Management System, Bounce Management, Order Routing, Intent Driven Interaction (IC WebClient), or Lead Distribution, as shown in Figure 9.34.

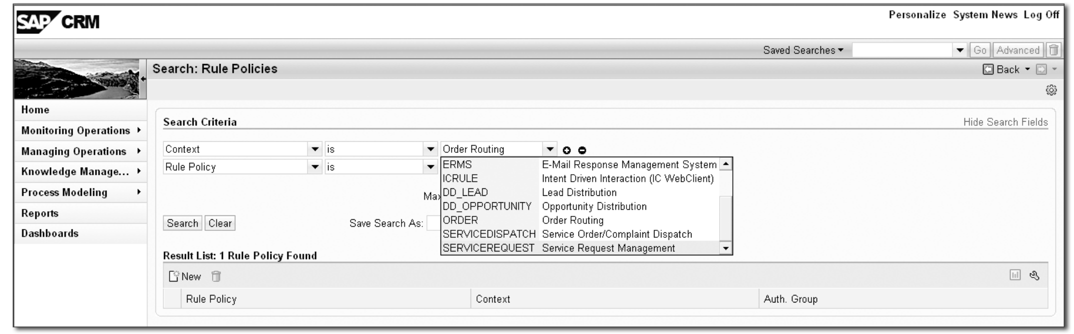



**Figure 9.34** Rule Policies Context

Each context has unique and specific attributes and actions, for example, for escalating service tickets, you need Order Routing context. The Order Routing context has the following attributes in standard SAP CRM:

- Transaction Type
- Customer
- Product
- Category
- Status
- Priority

As shown in Figure 9.35, order routing also allows the following actions within the system:

- Invoke Policy
  You can use this action to branch from one policy to another policy based on rules. Separating rules where the requirement results in multiple rules causes huge performance issues. Therefore, it makes sense to separate the rules and make use of the invoke policy based on your specific needs.
- Routing
  This changes the Responsible Group of the transaction to the organizational unit defined in the rule and removes the other current Employee Responsible.

- Stop Further Rule Processing
  This stops further rule processing within a policy. You typically use this action in nested rules to stop rule evaluation at a desired outcome. This avoids superfluous evaluation of the rest of the rules in the policy.

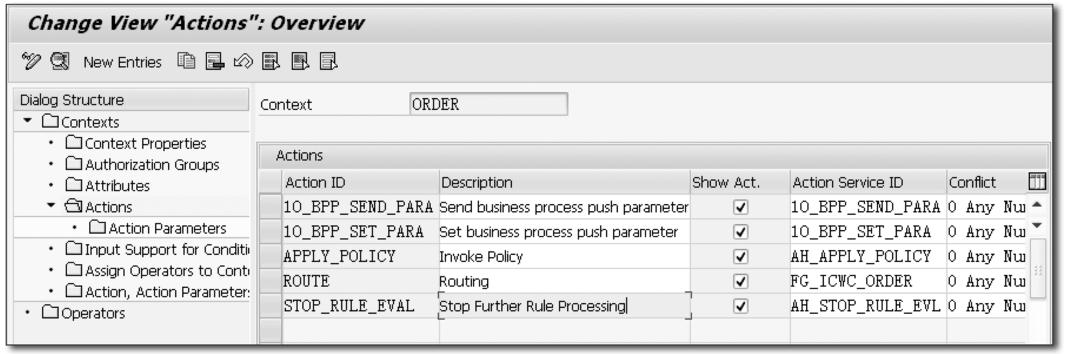



**Figure 9.35** Actions within the Order Routing Context

## 9.8 Call List Management

Call list management allows companies to organize new or existing customer and make calls regarding any kind of promotion that the company is running. They can execute these calls from the IC application. In most cases, managers create the call list and assign the call list with the relevant agents. You can also assign a call script to the call list so that agent knows exactly what to communicate to the customer.

Marketing professionals might want to make sure that existing customers are satisfied with the services provided by the company or execute some kind of campaigns for a target group of customers. In this scenario, call lists and planned activities play an important role because they help call the list of the customers based on the customer calling time. Call list management can involve activities such as telesales, telemarketing, service follow-ups, and more.

SAP CRM enables you to generate call lists and create planned activities (outgoing call), as shown in Figure 9.36.





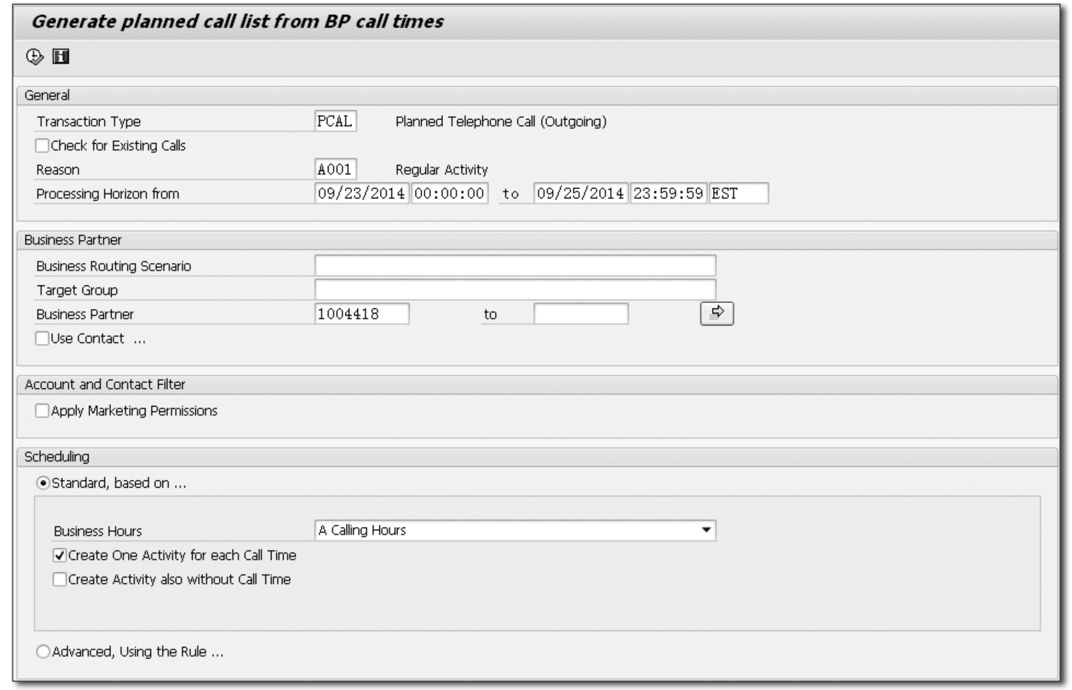



**Figure 9.36** Generating a Planned Call List from the Business Partner Call Times

For the purposes of example, let's say an organization has a requirement to generate a call list for a specific set of customers as a part of a regular activity and service follow-up. Most companies hire employees to execute this kind of task and run telemarketing activities to create new customers and service existing customers. In these scenarios, creating call lists and planned activities comes in handy for generating the call list that can be maintained by the marketing manager and agents involved.

The planned activities and the call list refer to the business partner calling hours, and you have the option of creating one activity for each call time. This means that one activity is created for the calling hours maintained for the business partner; for example, calling hours for Monday are 10:00 am to 11:00 am and for Tuesday are 11:00 am to 12:00 am. Therefore, two planned activities will be created, one for each set of calling hours. You can create the call list and planned activities via the menu path, Interaction Center • Supporting Processes • Outbound Calling • CRMD_CALL_LIST - Generate Business Transactions and Call Lists.

Within Transaction CRMD_CALL_LIST, it's important that you keep the Generate Call List checkbox activated. You can assign the responsible user or organizational unit to assign the call list that is generated.

Figure 9.37 shows the Call List Maintenance: Change screen where, along with deleting, viewing, copying, splitting, and merging the call list, you can also search for the call list, assign the call list to the agent, synchronize call lists with the CTI tool that requires automated dialing, and view the call list statistics.

You can maintain the call list via the menu path, Interaction Center • Supporting Processes • Outbound Calling • CRMD_TM_CLDIST – Call List Maintenance.

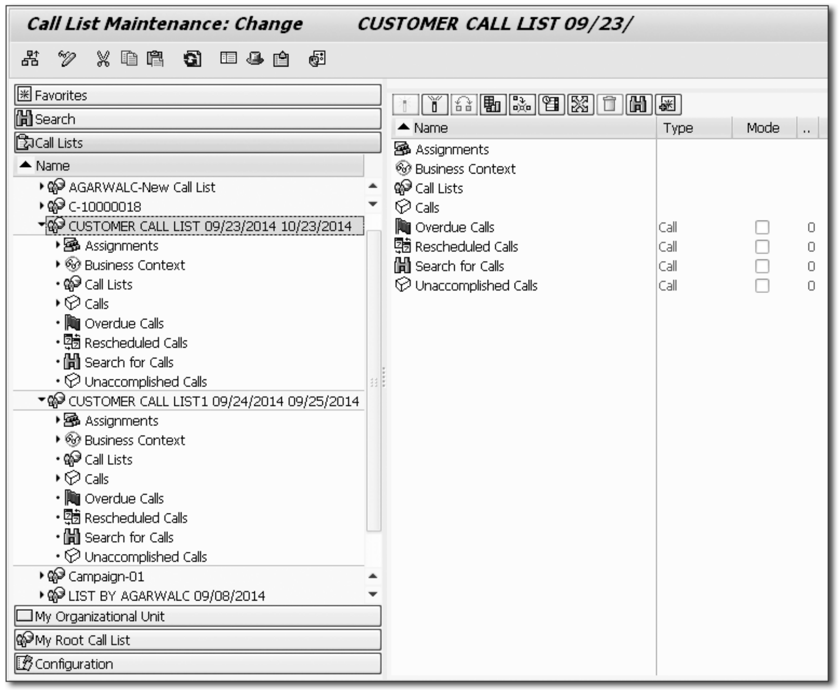



**Figure 9.37** Call List Maintenance

**Call List Maintenance**

You can't access the Call List Maintenance screen from the SAP CRM WebClient UI because this function is only available in the SAP CRM GUI. In addition, this transaction isn't marked for SAP GUI for HTML, so you can't launch this transaction on SAP CRM WebClient UI either.





After the call list is created and maintained, you can view the call list and the customer calls that need to be executed in the WebClient UI screen, that is, the Call Lists work center, as shown in Figure 9.38.

The call list can be executed as a part of Manual dialing or Automated dialing as designated in the Mode column. Manual dialing is simple: the call list generated is assigned to the agent, and the agent executes each call within the call list manually. For automated dialing, the call list is transferred to the CTI tool, which sends the call to the agent as an incoming call if the business partner answers the call.

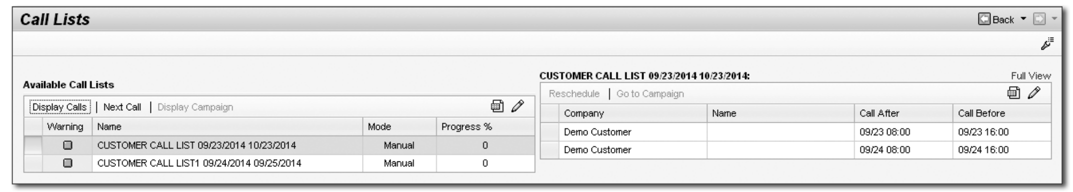



**Figure 9.38** Call List on the WebClient UI Screen

A call list is a helpful and powerful tool that allows an agent to connect with customers and reduce the service cycle time. We've covered some basic aspects of call list creation, maintenance, and execution. In the next section, we'll look at how scripts can be generated for customer calls.

## 9.9 Interactive Scripting

The Interactive Script Editor enables you to create the script with specific questions directed to the customer. This is very helpful in cases where an organization is running some kind of campaign or a promotion and requires you to provide the product information to the customer.

The Interactive Script Editor is an extension of the call list functionality, which means the interactive script can be assigned to a call list that the agent works on. The Interactive Script Editor is available under the business role IC_MANAGER and can be created by a marketing promotion manager. The script created is then assigned to the agent to run the promotion.

The Interactive Script Editor allows you to create questions, answers, and actions. It also consists of a repository of existing and searchable scripts. Interactive scripts are useful for guiding a newly hired agent through the call. It also improves the communication between the agent and customer.

## 9.10 Knowledge Search

The knowledge search function within SAP CRM allows an agent to search for solutions for recurring customer problems. Furthermore, knowledge search is comprised of knowledge articles that provide information such as user manuals, storing transaction templates, how-to documents, troubleshooting articles, and so on. It's one place where all information regarding any problem resides.

While organizations often do have solutions to customer problems, the information is scattered and not collated at one place. Knowledge search provides a way to store the answers to key problems in order to react quickly to customers needs. One example of knowledge search is the SAP Support Portal; before logging any kind of incident to the SAP help desk, the SAP Support Portal takes you to the Prepare Solution Search and Find Solution steps. This means you can find SAP Notes in the SAP Support Portal solution database that can resolve your issue before logging the incident.

A knowledge article resides in a knowledge base. The SAP default knowledge base is Solution Database (SDB). If you want to create your own knowledge base, you can do so by implementing BAdI: Knowledge Bases. The knowledge article search is carried out by the TREX search engine.

## 9.11 Email Response Management System

The *Email Response Management System (ERMS)* allows an organization to manage incoming email effectively. Sometimes companies have difficulty managing their incoming mail due to the sheer volume. This results in delayed responses to customer issues.

To avoid any kind of customer issues, it's imperative to properly manage incoming emails and route them to the corresponding service skill group to work on to reduce the time gap between receiving emails and executing the actions. This is an automated way of managing emails with minimal manual intervention. ERMS also helps managers view the complete email lifecycle and monitor those emails.





This functionality adds value to an organization because it saves both time and money. In some instances, an organization may want to auto-respond to certain issues without creating any business object in the system. ERMS provides some of the automated features that help organizations respond to customers on certain issues without agent intervention. Based on your business needs, you can also auto-prepare emails before responding to the customer and send it for approval to the agent. The three automated email response features are email acknowledgement, auto respond, and auto prepare. With email acknowledgement, you typically create the transaction with the incoming email like a service ticket, whereas with auto respond, you don't need to create a transaction for the incoming email and respond to the customer with the issue resolution.

### 9.11.1 Business Functions

ERMS provides a number of functions. Some of these features belong to the IC_MANAGER business role, whereas some falls under the IC_AGENT business role:

- **Rule policies**
  Rule policy is used to achieve certain business functions that are carried out by an organization on a frequent basis. It invokes specific actions automatically as soon as predefined conditions are met. For example, with certain email addresses, you can configure the rule policy to create a specific transaction. ERMS services trigger the rule policy assigned in the configuration.
- **ERMS Simulator**
  ERMS Simulator helps the IC manager simulate the rules created within the rule policy. This way the IC Manager can see the result of the rules created.
- **Email Workbench**
  The Email Workbench provides the capability to assign, route, forward, edit rules for, and set the email to complete. These are IC manager functions that give a manager an overview of the email processing in the IC.
- **Email threading**
  Email threading allows you to link an email to the service transaction. This means that any email coming from the customer or agent replies are linked into one tree structure with the service transaction. Tracking text is used to link the emails to the transaction and mail forms are used to create a tracking text.

- **Auto-transaction creation**
  Any email received by a customer can create a transaction in the SAP CRM system if the rule policies are set up appropriately.

### 9.11.2 ERMS Setup

Following are some of the basic steps required to set up ERMS in your system:

1. Activate the workflow customizing, which is carried out in SAP NetWeaver under Application Server • Business Management • SAP Business Workflow • Maintain Standard Settings (see Figure 9.39).

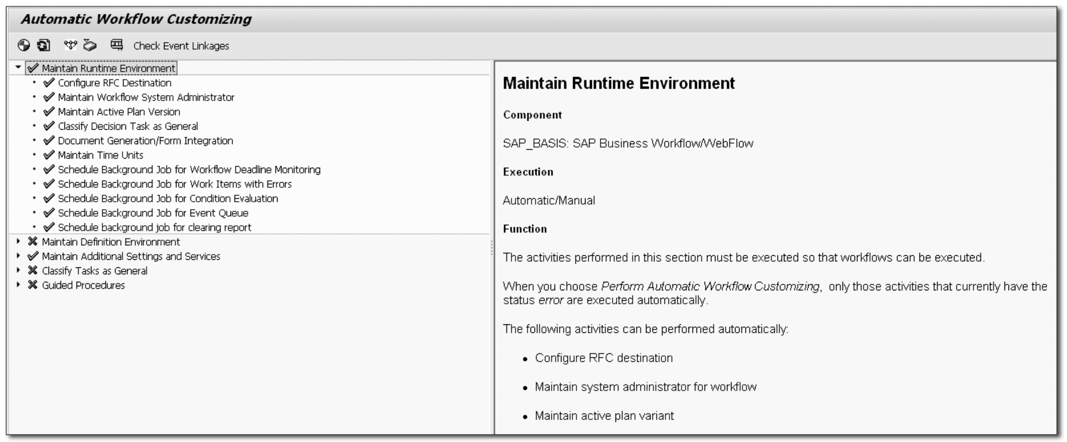



**Figure 9.39** Maintaining Workflow Standard Settings

2. Create the receiving email address that the customer is going to use to send an email to the organization. This is maintained in the SAP menu; choose Interaction Center • E-Mail Response Management System • Settings • Define Receiving E-Mail Addresses/Fax Numbers (see Figure 9.40). Enter the Description.

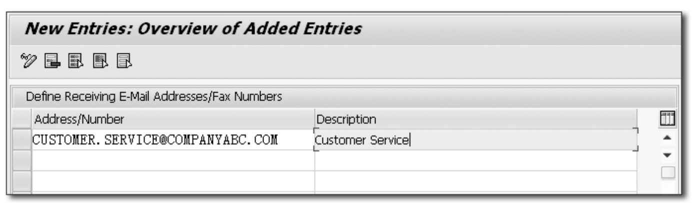



**Figure 9.40** Defining the Receiving Email Address





3. To trigger the ERMS workflow, assign the receiving email address to the ERMS workflow. In the SAP menu, choose Interaction Center • E-Mail Response Management System • Settings • Maintain Recipient Distribution. The New Recipient is assigned based on the SAP object instance – ERMS support 2 (see Figure 9.41 and Figure 9.42).

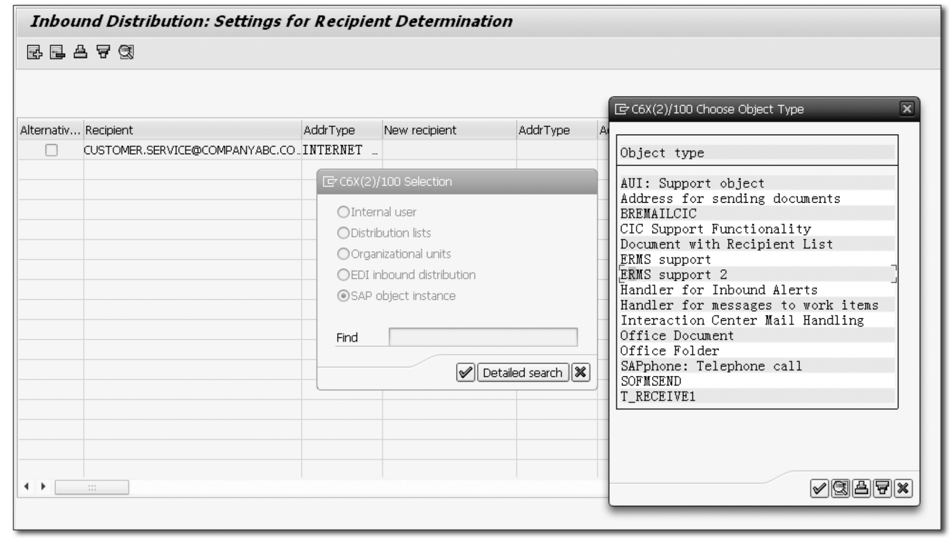



**Figure 9.41** Inbound Distribution: Settings for Recipient Distribution (1)

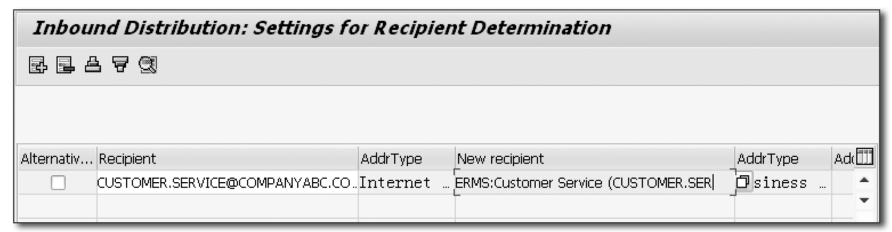



**Figure 9.42** Inbound Distribution: Settings for Recipient Distribution (2)

4. Next, assign agents to the general ERMS task to allow the email to be routed to the specific skill group. You can see the task when accessing the Assign Agents hyperlink shown in Figure 9.43. Then activate the workflow event by selecting Activate event linking. To activate the event link, access Interaction Center • E-Mail Response Management System • Settings • Assign Agent for E-Mail Handling (see Figure 9.44).

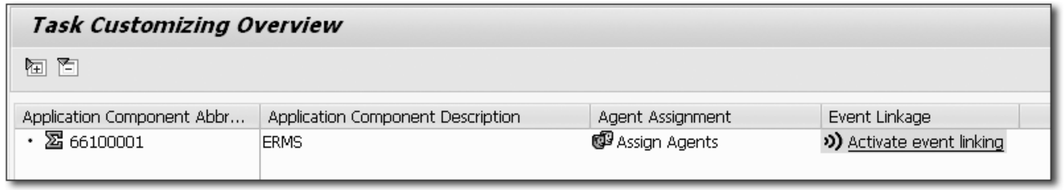



**Figure 9.43** Activate Event Linking

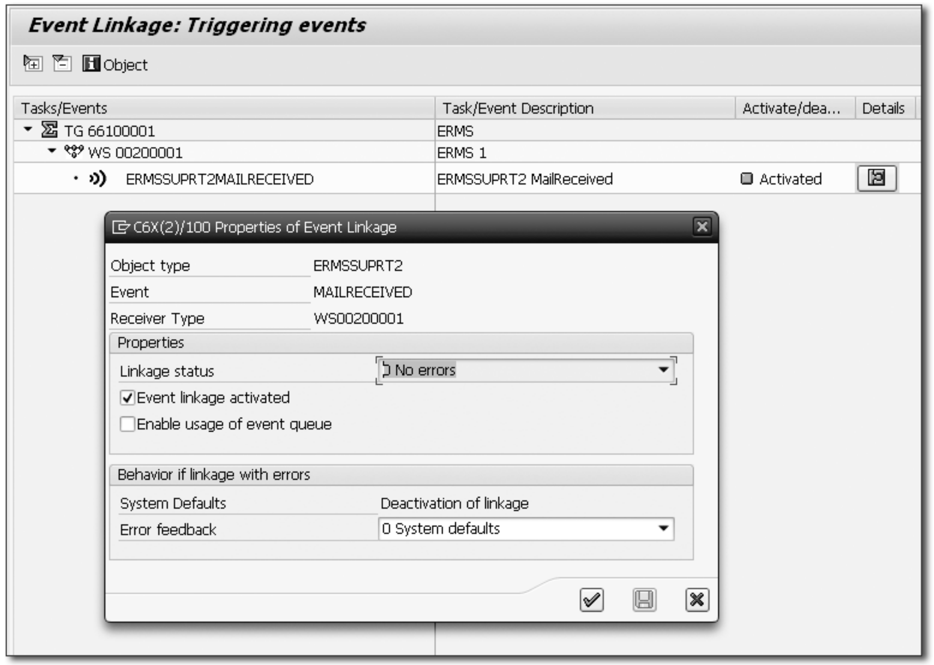



**Figure 9.44** Event Linkage: Triggering Events

5. Object type ERMSSUPRT2 is executed when the customer sends an email to the email ID assigned to the new recipient ERMSSUPRT2. This initiates the ERMS object type, as shown in Figure 9.45. The methods within this object type are initiated, and after the processing of the object type is completed, the event `MailReceived` triggers the workflow `200001 ERMS1`, which triggers the service manager profile assigned to the receiving email ID.

   Figure 9.46 shows the assignment of the Object Type ERMSUPRT2 to the Workflow template 200001 ERMS1.





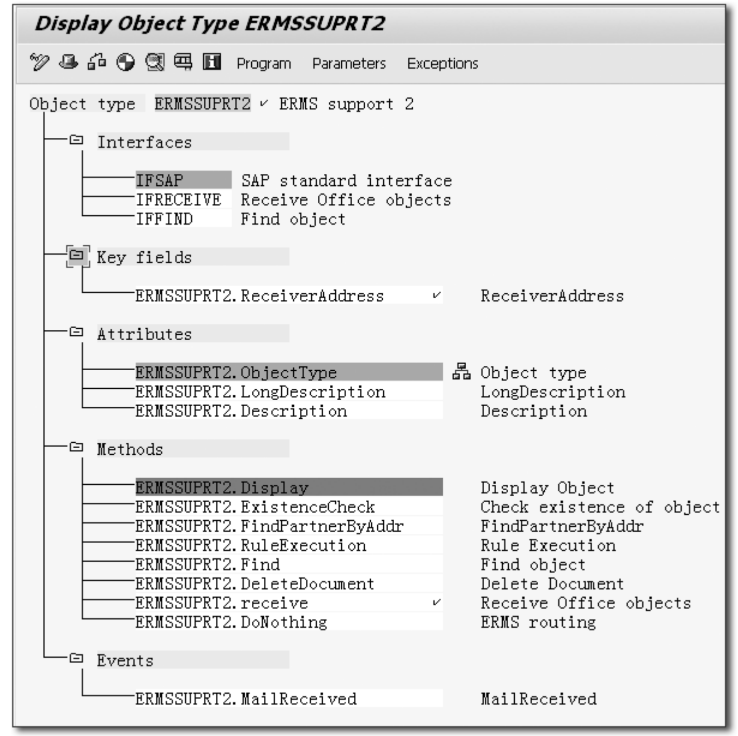



**Figure 9.45** Object Type: ERMSUPRT2 ERMS Support 2

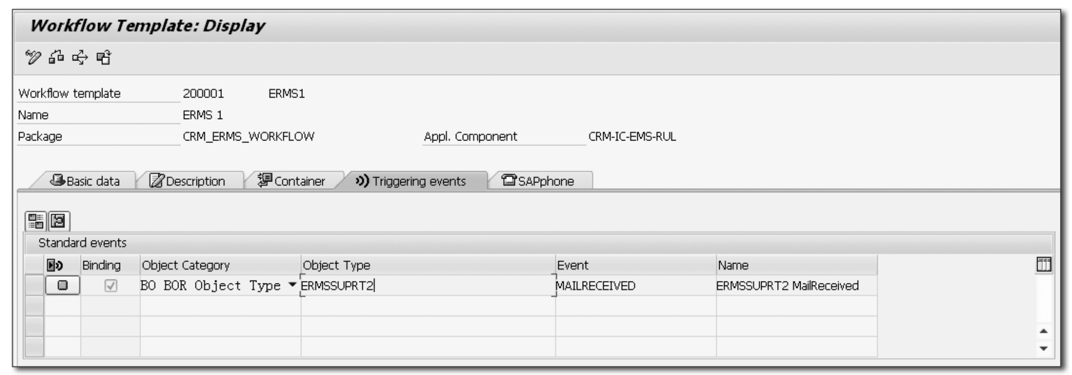



**Figure 9.46** Object Type ERMSUPRT2 Assigned to the Workflow 200001 ERMS 1

6. Navigate via the menu path, Customer Relationship Management • E-Mail Response Management System • Service Manager • Define Service Manager

Profiles. In this step, you configure the ERMS service manager profile (Srv Mgr Profile) and assign the profile to the Receiving E-mail ID. The DEFAULT rule is assigned to the InvocOrder 50 under Directly Called Services (see Figure 9.47 and Figure 9.48).

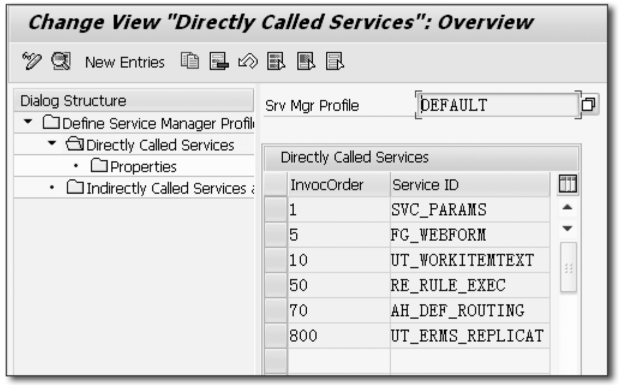



**Figure 9.47** Service Manager ID

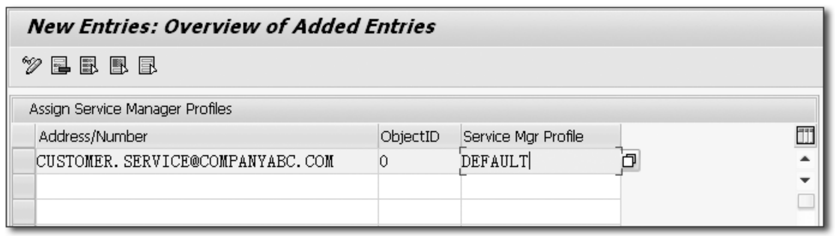



**Figure 9.48** Assigning the Email ID to the Service Manager Profile

After these steps are configured, you can create the ERMS rule policies and rules under Process Modeling • Rule Policies by accessing the IC_MANAGER role.

**ERMS Configuration**

For more details about ERMS and its configuration, refer to SAP Note 940882 ERMS FAQ Note.

In this section, we gave an overview of ERMS features and setup. ERMS allows an organization to manage incoming emails and route them to a specific group that can reply back to the customer in a timely manner.





## 9.12 Summary

In this chapter, we discussed the integrations, features, and functions available in the IC. We covered the CTI, multichannel integration, account identification and fact sheets, interaction record, agent inbox, business transaction routing, call list management, interactive scripting, knowledge articles, and ERMS functionality. In addition to these, different business functions such as IC Sales, IC Marketing, and IC Service were also discussed. In the next chapter, we'll look at another SAP CRM application: the Web Channel.

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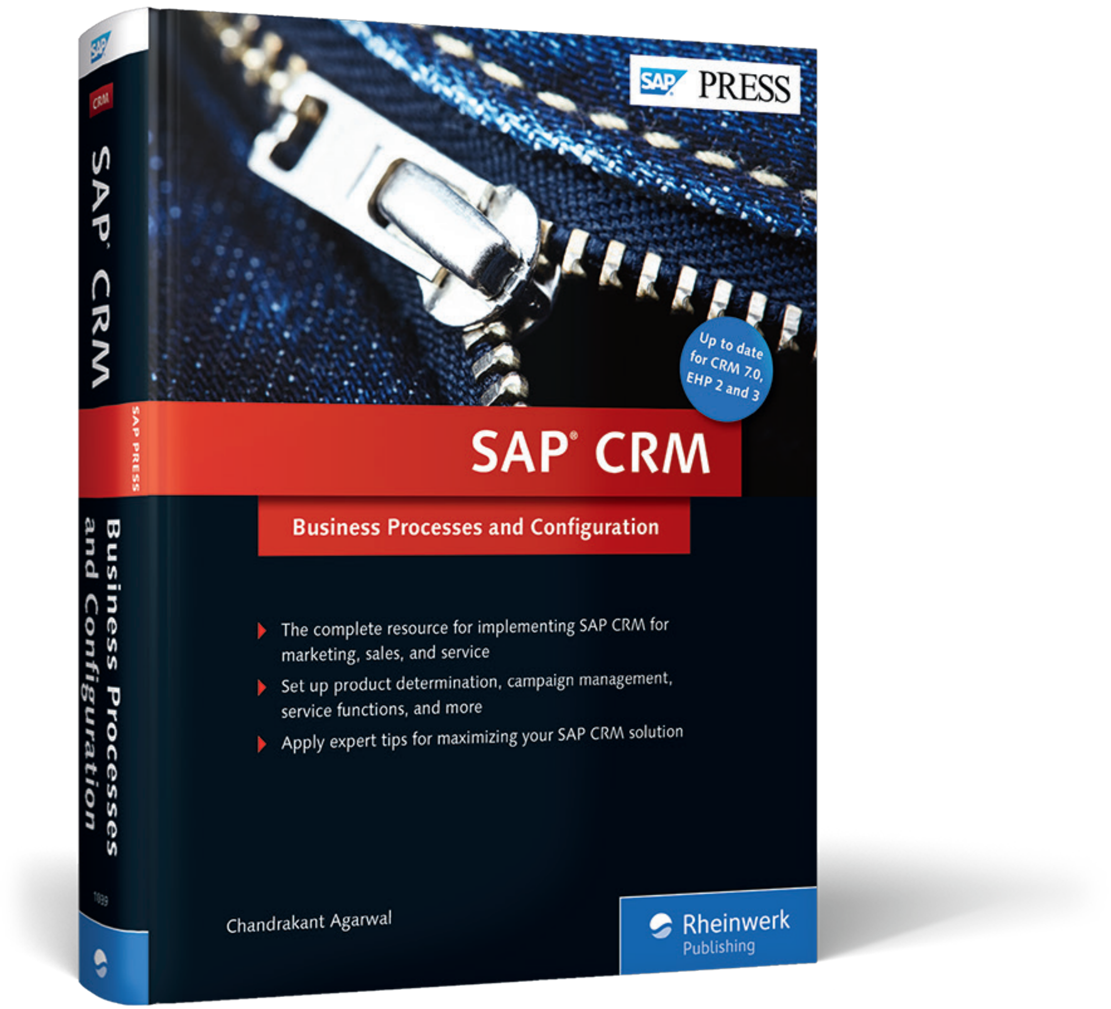


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