Crm Customer Relationship Management

ISI Business Solution Template Guide

Version 14.1

Aurea

Unlimited Possibility

Notices

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Preface

For details, see the following topics:

- About this documentation
- Notation conventions
- Aurea global support

About this documentation

This guide is part of the documentation set for Aurea CRM.

Notation conventions

This document uses the following notation conventions:

Convention	Meaning
`Fixed-width`	`Fixed-width` font indicates code, path names, file names, environment variable names, parameter names, command names, machine names, URLs.
`Bold Fixed-width`	**`Bold Fixed-width`** font is used to indicate user input or to emphasize certain lines of code.
Italic Fixed-width	*Italic Fixed-width* font indicates a placeholder for which you must supply a value.
Bold Sans serif	**Bold sans serif** typeface indicates the names of graphic user interface elements such as dialog boxes, buttons, and fields.
Italic serif	In text, *italic serif* typeface indicates the first use of an important term. The term is defined in the glossary.
Underlined	Underlined text in command lines and parameter descriptions indicate that you only have to enter the underlined part of the command or parameter name. For example, if you use the`-LOGFILE` parameter in a command, you only need to enter `-LOGF`.
[ ]	Brackets enclose optional arguments.
{ *a* | *b* | *c* }	Braces enclose two or more items. You can specify only one of the enclosed items. Vertical bars represent OR separators. For example, you can specify a or b or c.

Convention	Meaning
...	Three consecutive periods indicate that you can repeat the immediately previous item. In code examples, they can be horizontal or vertical to indicate omissions.
Menu > Choice	An angle bracket between two menu items indicates that you should choose an item from a menu. For example, the notation **File** > > **Exit** means: "Open the **File** menu and choose **Exit**."
>>	Links to related information in other chapters or documents are indicated using the **>>** symbol.

Aurea global support

If you encounter a problem while using an Aurea product or require assistance with downloading the software or upgrading a product release, please open a ticket on Aurea Support Central. Preferably, search the articles on the Aurea Knowledge Base for solutions to your issues before opening a ticket.

Information about the support organization is available on Support Central. The product documentation is available athttps://help.aurea.com/crm/#.

For information about purchasing an upgrade or professional services, contact your account executive. If you do not know who your account executive is, or for other queries, contact us through our website.

1

Introduction

An introduction to the Business Solution template guide.

A functional overview can be found in the info letters, which are created for every new version.

For installation help refer to the separate installation guide.

To improve the speed during import of the cockpit packet, version of the template does not contain the text for the data model and formats additionally saved in the text table (04). For information on how to translate your texts please follow the instructions in the wiki or in the customization guidelines.

2

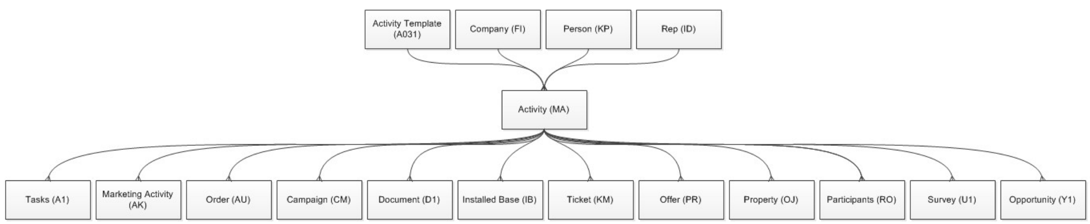
CRM Base

Here you can know the basic settings required for Business solution template.

Below are the topics that guides you through the basic configurations and settings for business solution template:

Activity Management(CRM 11001)

Learn about the activity management for business solution templates.



Different filter masks for the activity types are implemented. Furthermore the process which starts a new MA record is customized so that you can choose the activity type within the process.

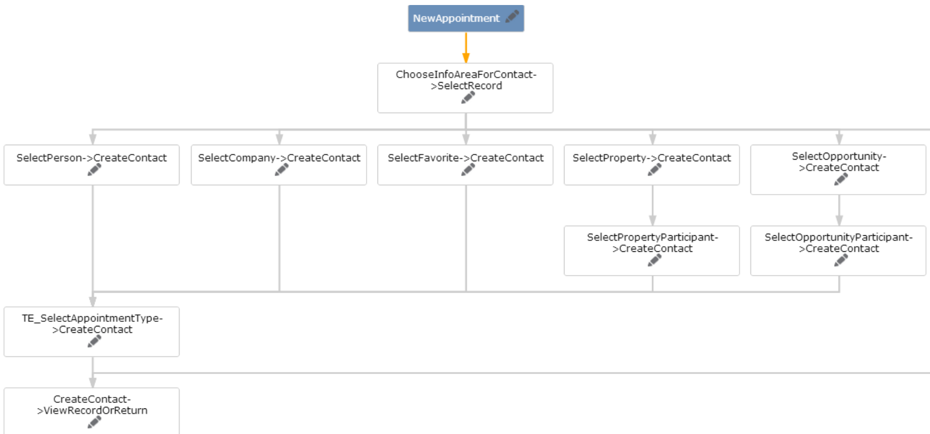
Filtermasks

The following three Field groups are used:

- MA, for all activity types except E-Mail
- TE_MA_Email, used only for activity type E-Mail
- TE_MA_Completed, used for all activities which status are Completed

Additionally this masks use new textfields for HTML Input which is described in the 'Various' -> 'HTML Textfields' topic.

Process

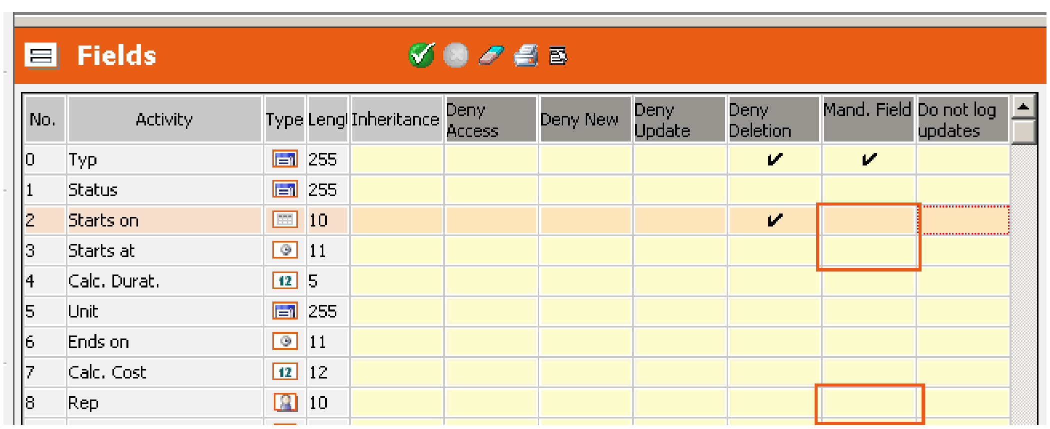


The process is copied from the default configuration. The only adjustment is the “TE_SelectAppointmentType-

>CreateContact”. See the description in the designer documentation for more information.

Rights

Do not set any of the following fields as mandatory in the rights module –otherwise you might get problems when you use the campaign management or event management functionality.



Fields

No.	Activity	Type	Lengl	Inheritance	Deny Access	Deny New	Deny Update	Deny Deletion	Mand. Field	Do not log updates
0	Typ		255					✔	✔	
1	Status		255							
2	Starts on		10					✔		
3	Starts at		11							
4	Calc. Durat.		5							
5	Unit		255							
6	Ends on		11							
7	Calc. Cost		12							
8	Rep		10							

MA/2 – Starts on

MA/3 - Starts at

MA/8 - Rep

Activity Templates

9	4016	Updated at	me(hh:mm:ss.ttt) T.	Updated on
10	6000	Template Name	text(50)	
11	6001	Activity Type	fix catalog	
12	6002	Subject	text(150)	
13	6003	Text	text(6000)	
14	6004	Location	text(200)	
15	6005	Status	fix catalog	
16	6006	Purpose	fix catalog	
17	6007	Priority	fix catalog	
18	6008	Text	text(12000)	Text

Templates for the Activity (MA) info area are implemented. Activity templates are stored in the A031 info area. Each field which is defined in A031 corresponds to a field in MA.

Important: There is a new text field for HTML input which is described in the ‘Various’ -> ‘HTML Textfields’ chapter.

The template field in MA is as follows:

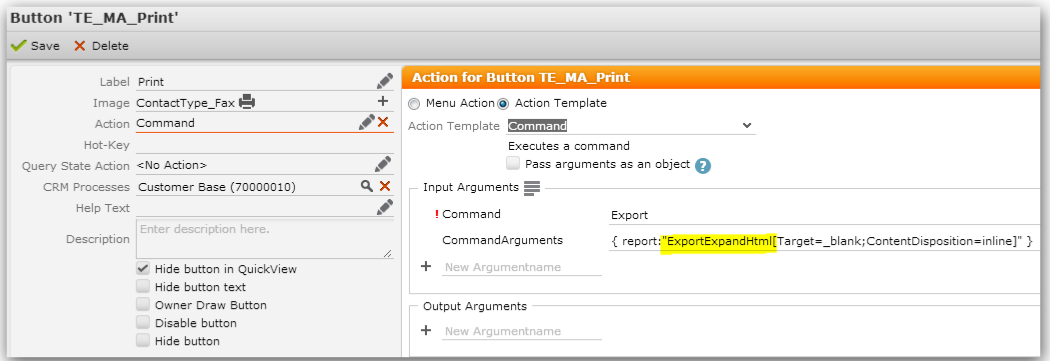
206	6002	Message	reference (table)
207	6003	Number of Attacl	int(4Byte)
208	6004	Location	text(200)
209	6005	Template Name	text(50)

A Select function is configured for the ‘Template’ field in the ‘MA’, ‘TE_MA_Email’, ‘TE_MA_Fax’,‘TE_MA_Info’,‘TE_MA_Internet’,‘TE_MA_Letter’,‘TE_MA_QuickView’, ‘TE_MA_Telephone’, ‘TE_MA_Telephone_Completed’, ‘TE_MA_Visit’ and ‘TE_MA_Visit_Completed’ details mask, which copies the fields from A029 to the corresponding A1 fields.

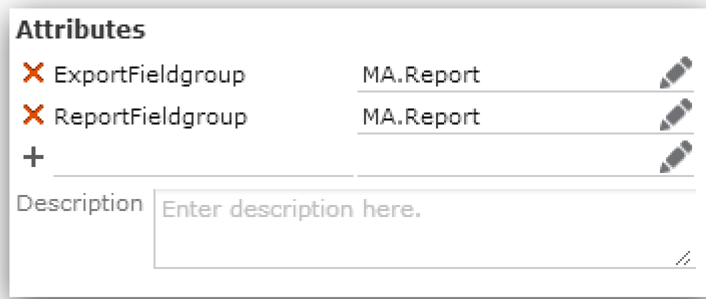
If you want to add a new field to the Template, you need to add it in the data model and configure the Select function to copy the A031 field to the correct MA field.

Activity Print

In v3 of the template we created the “TE_MA_Print” button which is shown for all activity types. This button exports the “MA.Report” field group as HTML.



The following parameters are set in all MA field groups to guarantee that this field group is always used:



Web Configuration

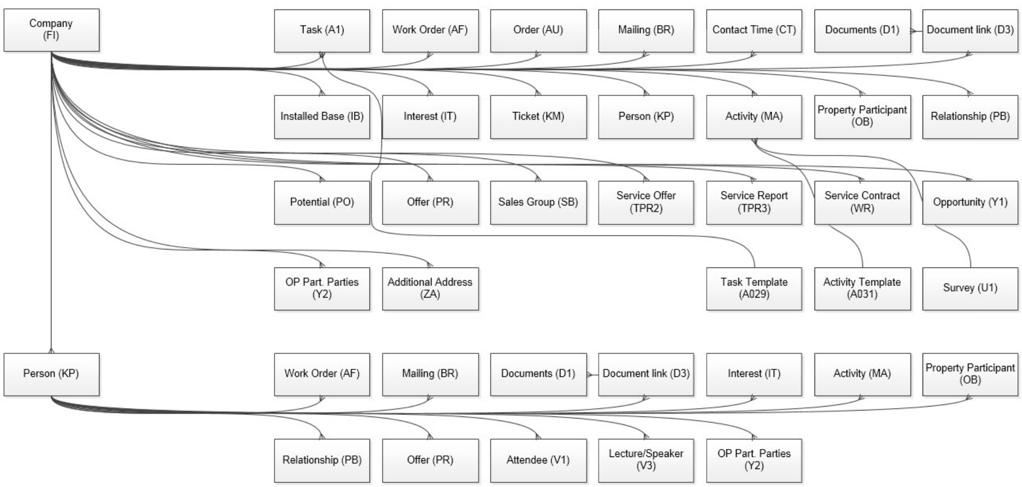
The configuration parameter Schema.EnableLiveCalculations is enabled in TE_ISI for this info area. So interactive business logic, like change of end time when start time gets changed, will be active.

Known Bugs

Find-as-you-type does not work in the order field (group: ‘Linked Elements’) of the activity mask.

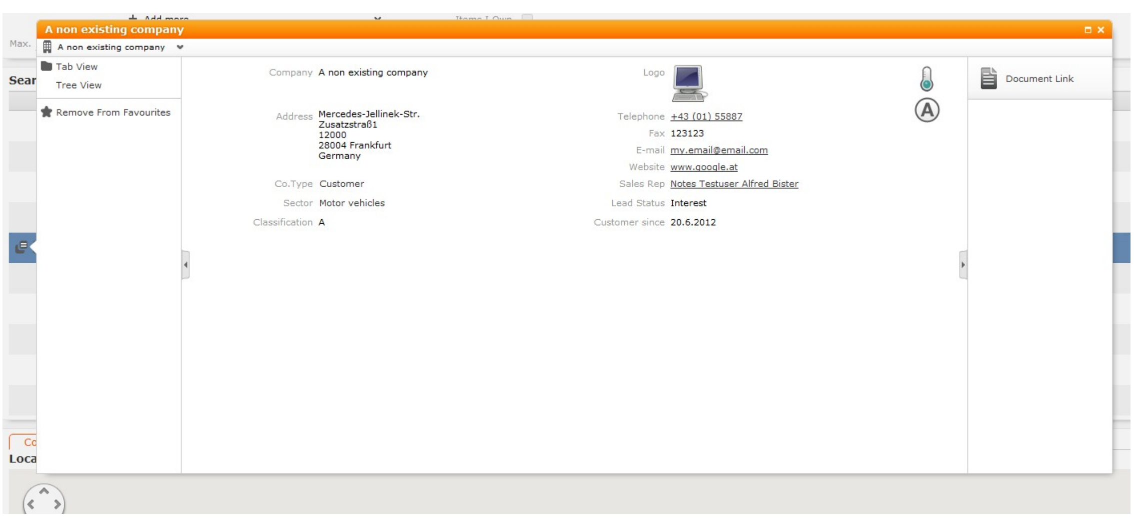
Customer Base(CRM 70000010)

Learn about the quick view and search functionality for business solution template.



FI Quick View

The FI Quick View offers the user a short overview of the selected record before you see the whole information in the details mask. Additionally, the context menu and all related info areas will be displayed on the left and right hand-side.



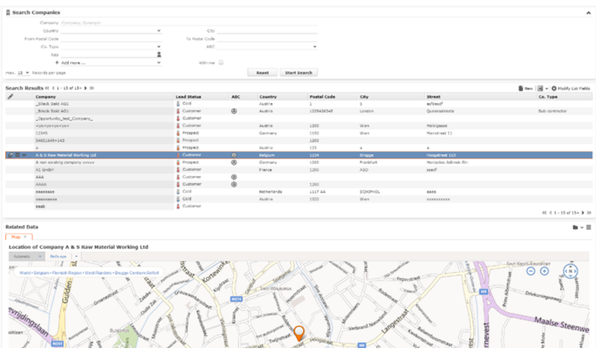
Note: If you want to display the same mask in the quick view as in the detail view you don't have to make any further configurations. The quick view will use the detail mask as configured.

If you want to display your specific quick view you have to carry out the following tasks:

- implement an Expand-Configuration named FI.QuickView which uses its own Field group
- configure (only) the Details Control

FI Search

The company (FI) search offers different default search criteria, like company name, country or city. Additionally, you can add your own search criteria to the mask. In the list you can see the lead status displayed as a symbol and text. A map will be displayed if you click on a record in the list.



Note: To configure a picture for the “lead status” in the list view, add the following code to the field’s render hook function:

```
u8.TeISI.RenderHooks.fi_leadstatus_list($);
```

In order to display Bing maps below the list assigned to each record you have to add the following:

- a “SearchSubList” header in your header group inside the same info area in which you edit your list
- and then the following code in the “Form Name” text field:

  ```
  { type: "RecordMap", options: { size: { height: 600 } } }
  ```

CRM Intelligence(CRM 1.4.7.400-QV-Analysen)

Learn about CRM Intelligence for Business solution template.

Architecture

The user is already signed in to Aurea CRM. This is used to authenticate the user on the QlikView server. The Aurea CRM server requests a ticket from the QlikView server to authenticate the user.

The user can execute the given analysis using this ticket.

Security Settings on the QlikView Server

You need to configure a trust relationship between the QlikView and the update.CRM server on the QlikView server. You can configure this in the config.xml in the following directory (default installation of QlikView):

`C:\ProgramData\QlikTech\WebServer`

To authenticate the update.CRM server on the QlikView server you need to insert the IP address of the update.CRM server in the configuration, e.g.:

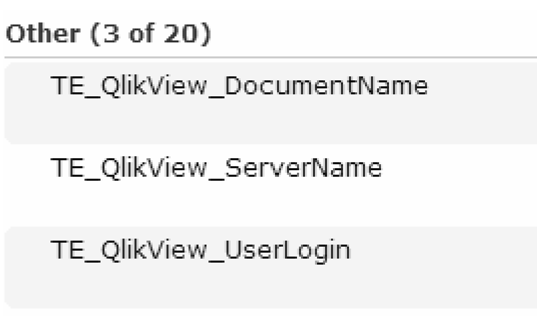
<Authentication> <AuthenticationLevel>Login</AuthenticationLevel> <LoginAddress>/qlikview/login2.htm</LoginAddress> <LogoutAddress>logout.htm</LogoutAddress> <GetTicket url="/QvAjaxZfc/GetTicket.aspx" /> <GetWebTicket url="/QvAjaxZfc/GetWebTicket.aspx"> <TrustedIP>172.20.7.212</TrustedIP> <TrustedIP>10.43.10.104</TrustedIP> </GetWebTicket> <HttpAuthentication url="https://_/scripts/GetTicket.asp" scheme="Basic" /> <HttpAuthentication url="/QvAJAXZfc/Authenticate.aspx"scheme="Ntlm"/></Authentication>Theservers with the 172.20.7.212 and 10.43.10.104 IP addresses are trusted and can execute the analysis in the above sample configuration file.

Web Ticket

To get a ticket for the QlikView server the `update.Template.Base.dll` must be present in the web\te.bin folder. It is delivered with the template.

Please also make sure that QlikViewAuthenticate.aspx is present in the web\te.base folder (this is also supplied with the template). This page is used to call the function inside the dll to generate a web ticket.

Configuration in the Aurea CRM designer

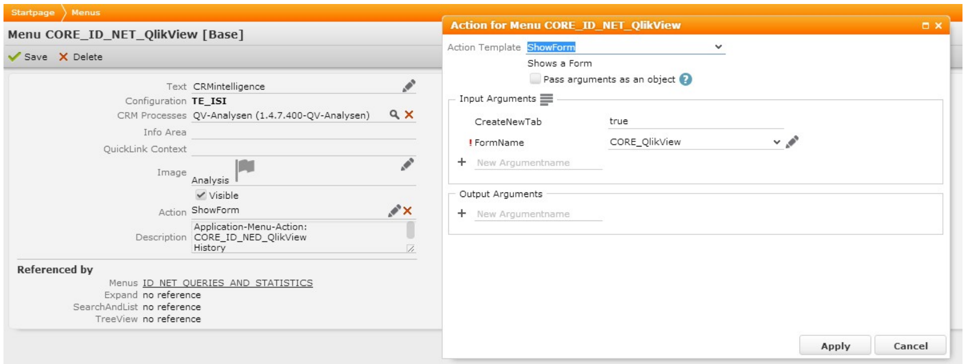


You need to configure the following 3 web configuration parameters in designer to use CRM Intelligence:

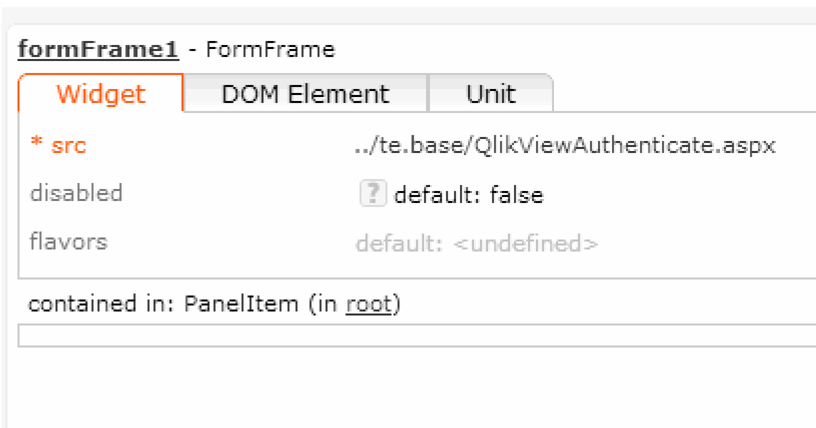
TE_QlikView_DocumentName: The name of the data model that you want to display (stored on the QlikView server)

TE_QlikView_ServerName: The name of the server where QlikView is running TE_QlikView_UserLogin: your domain for single sign-in, e.g. 'UPDATE\'

The CORE_ID_NET_QlikView menu action is calling the CORE_QlikView form:



The form shows an iframe with the source set to the QlikViewAuthenticate.aspx mentioned earlier.

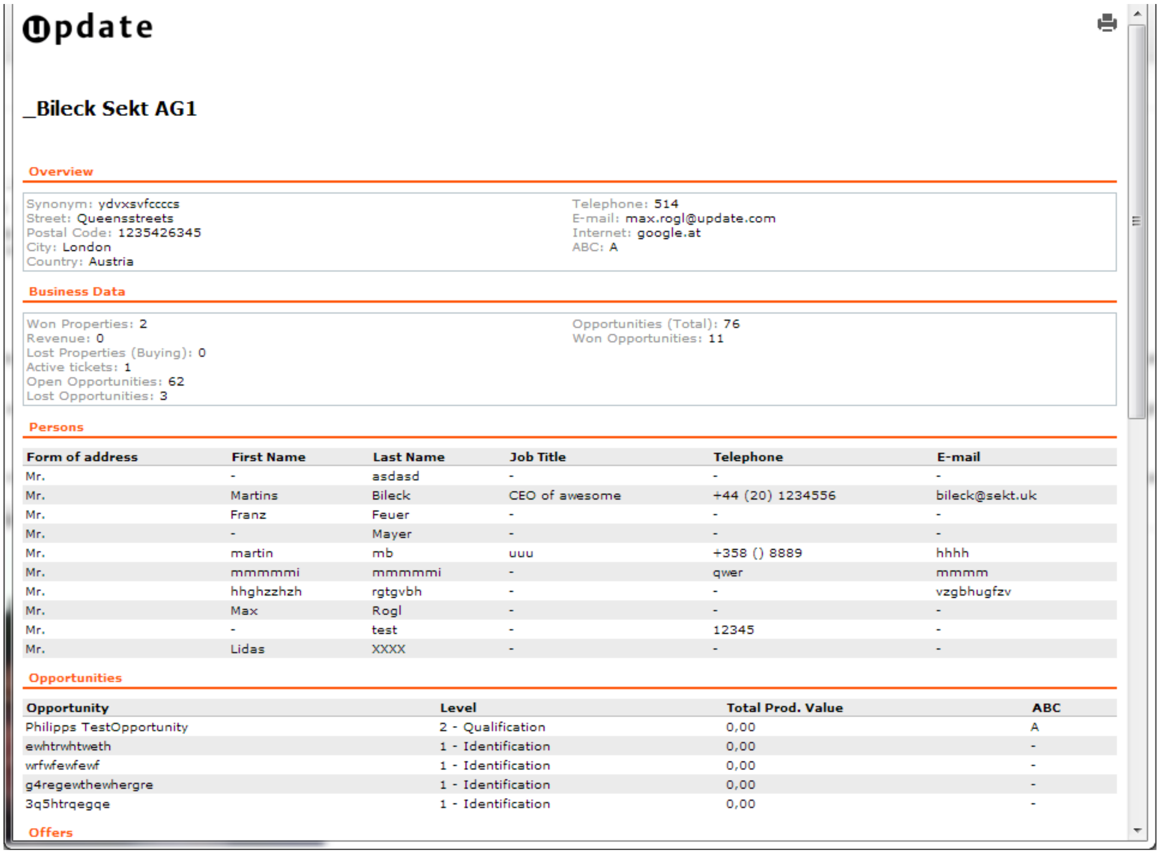


Customer Fact Sheet

Learn about the customer fact sheet for business solution template.

The customer fact sheet is implemented on the FI expand mask as a header button ('TE_FI_Factsheet'). It calls the 'QueryReport' action template and uses the 'TE_FI_FactSheet' query.

Other files used: 'TE_FI_Factsheet.xslt' and 'TE_library.xslt' in the data\reports\te.isi\xslt folder.



Update

_Bileck Sekt AG1

Overview

Synonym: ydvxsvfccccs
Street: Queensstreets
Postal Code: 1235426345
City: London
Country: Austria
Telephone: 514
E-mail: max.rogl@update.com
Internet: google.at
ABC: A

Business Data

Won Properties: 2
Revenue: 0
Lost Properties (Buying): 0
Active tickets: 1
Open Opportunities: 62
Lost Opportunities: 3
Opportunities (Total): 76
Won Opportunities: 11

Persons

Form of address	First Name	Last Name	Job Title	Telephone	E-mail
Mr.	-	asdasd	-	-	-
Mr.	Martins	Bileck	CEO of awesome	+44 (20) 1234556	bileck@sekt.uk
Mr.	Franz	Feuer	-	-	-
Mr.	-	Mayer	-	-	-
Mr.	martin	mb	uuu	+358 () 8889	hhhh
Mr.	mmmmmi	mmmmmi	-	qwer	mmmm
Mr.	hhghzzhzh	rgtgvbh	-	-	vzgbhugfzv
Mr.	Max	Rogl	-	-	-
Mr.	-	test	-	12345	-
Mr.	Lidas	XXXX	-	-	-

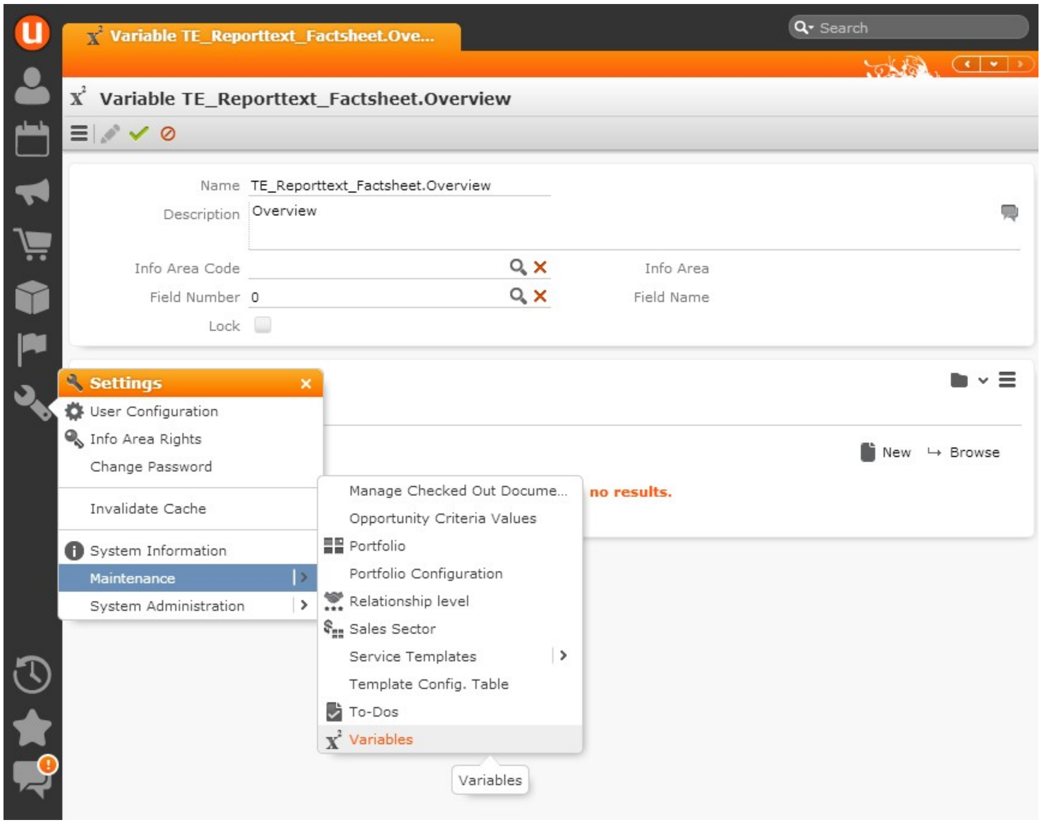
Opportunities

Opportunity	Level	Total Prod. Value	ABC
Philipps TestOpportunity	2 - Qualification	0,00	A
ewhtrwhtweth	1 - Identification	0,00	-
wrfwfewfewf	1 - Identification	0,00	-
g4regewthewhergre	1 - Identification	0,00	-
3q5htrqegqe	1 - Identification	0,00	-

Offers

Variables

The report uses multilingual variables for most info area names as they are needed in plural but the generated xml provides them in singular. They are available in the web application menu under Settings>Maintenance>Variables.



The variables are pulled using the following syntax:

<xsl:value-of select="v:Description('TE_Reporttext_Factsheet.tableprefix')" Where tableprefix must be a name which is used in the XML output (e.g. FIMA).

Hard-coded and dynamic values

There are some predefined hard-coded values in the xslt report:

- The whole 'Overview' section (Synonym, Street, Additional Info Street, PO Box, ZIP, City, Country, Telephone, E-mail, Internet, ABC)
- The 'Business Data' section up until the 'Lost Opportunities' field (Won Properties, Revenue, Lost Properties (Buying), Active tickets, Open Opportunities, Lost Opportunities)
- Every additional field/linked table which is added to the query will be dynamically created in the report. Empty fields will be hidden automatically.

Images

As the report is downloadable content, the images (logo, print icon) were implemented directly into the report by encoding them in base64.

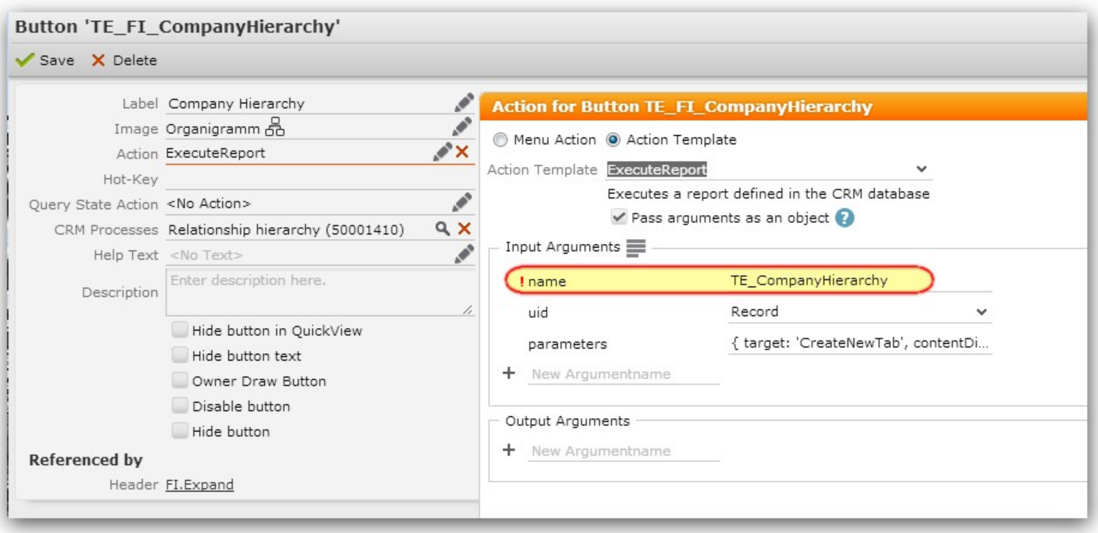
They are found in the 'TE_library.xslt' as variables ('global_logo' and 'global_print'):

```
<xsl:template name="global_logo">
	<img src="data:image/png;base64,iVBORw0KGgoAAAANSUhE
</xsl:template>
<xsl:template name="global_print">
	<a href="javascript:window.print()">
		<img src="data:image/png;base64,iVBORw0KGgoAAAAN
	</a>
</xsl:template>
```

Company - Hierarchy

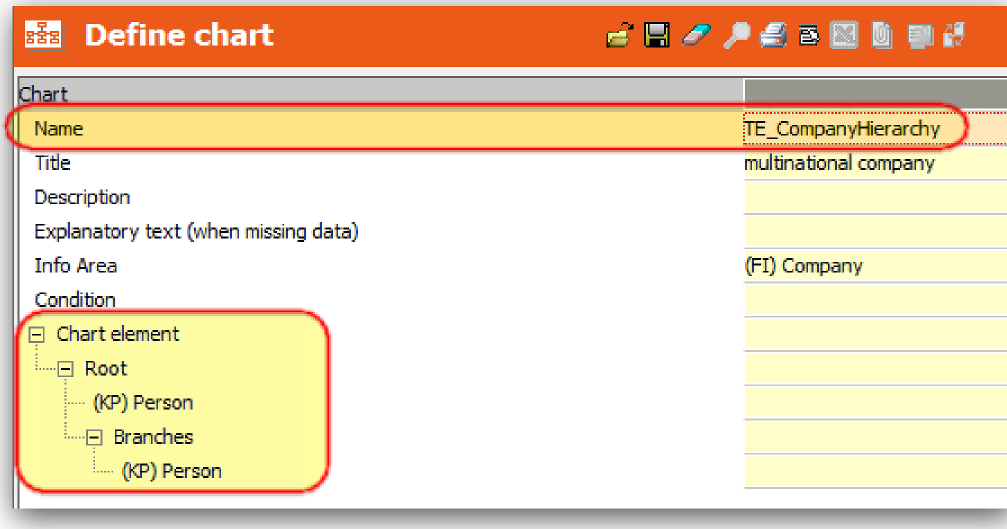
The Company Hierarchy is implemented in the FI expand mask as a header button ('TE_FI_CompanyHierarchy').

It uses the “ExecuteReport” action template which calls a WIN Report.

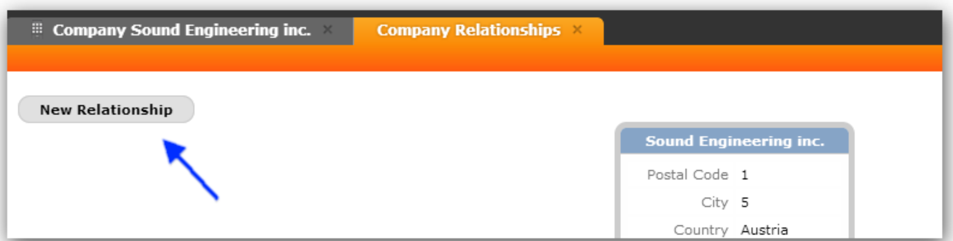


The following xslt file is used: “TE_FI_Hierarchy.xslt”

There is another xslt, which is needed to execute this report: “TE_library.xslt” WIN Chart Format:



We added a button in the report in v3 of the template to make it possible to create new relationship records (PB) from the chart.



Changed items:

- TE_FI_Hierarchy.xslt
- TE_FI_RelationshipDiagram.xslt
- TE_KP_RelationshipDiagram.xslt
- isireportfunctions.js
- new “hierarchy” process storage variable in the “CreateRelation” process
- new line in "reateRelation->
- ViewRecord“ process step in the dispatching area
- new "TE_PB_CallHierarchyChart“ process step to reopen the chart after creating a new PB record

Relationship Diagram for Company and Person

Learn about the replacement for company and person features.

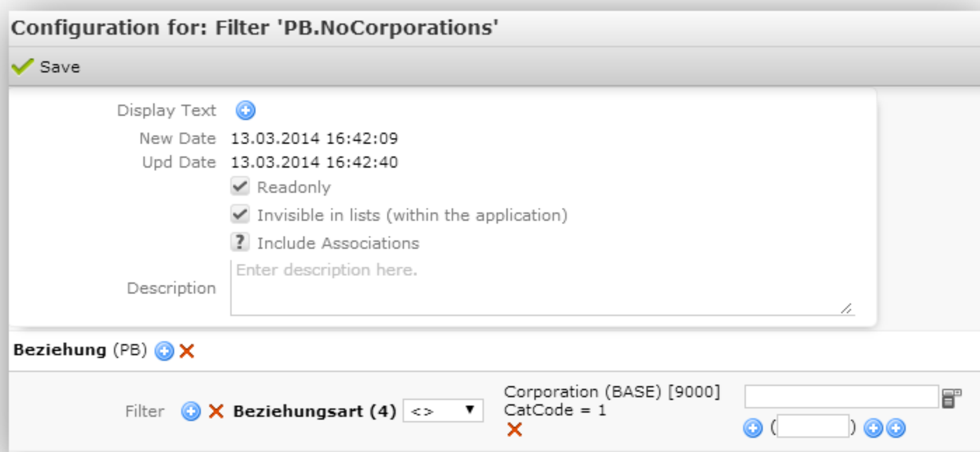
This feature replaces the two features - Company and Person.

The old buttons and menu actions are hidden in the template. If you want to use the old features you can easily copy the buttons and the menu action to your configuration and reactivate them.

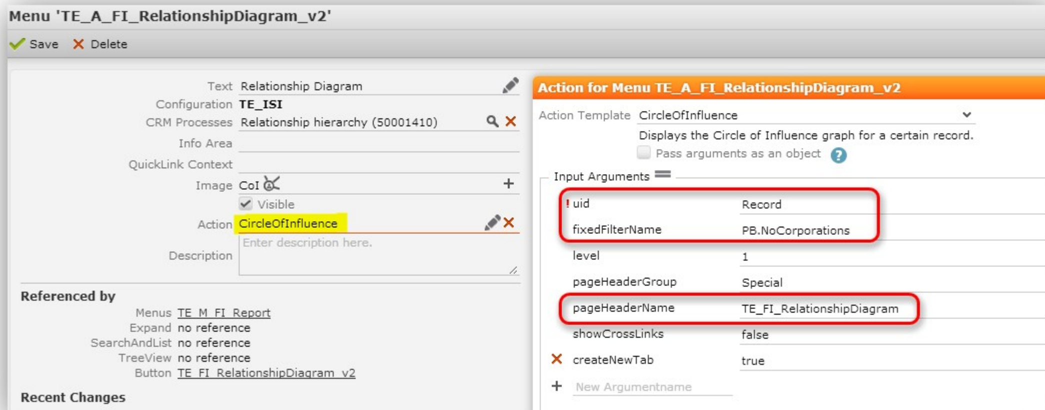
For this feature we are using the default action template "CircleOfInfluence" which is delivered by the product itself. Buttons and menu action:

- TE_FI_RelationshipDiagram_v2
- TE_KP_RelationshipDiagram_v2
- TE_A_FI_RelationshipDiagram_v2

The filter "PB.NoCorporations" is also used to filter the relationships, so that "Corporation" relationships are not displayed.



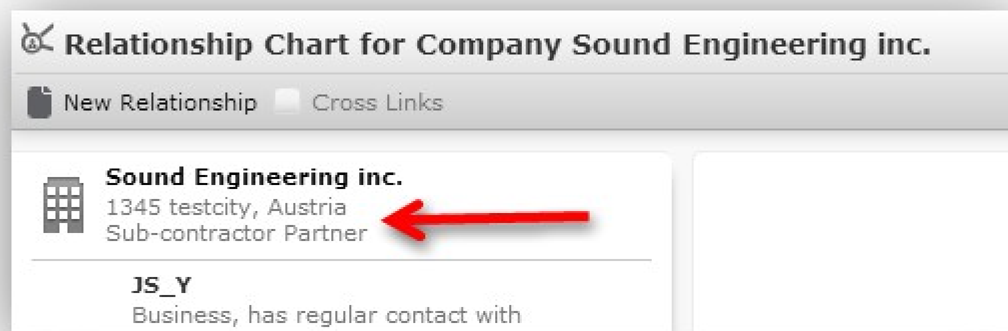
The action which opens the chart looks like this:



We created special headers for the charts, which can be easily changed in the project:

- TE_FI_RelationshipDiagram
- TE_KP_RelationshipDiagram

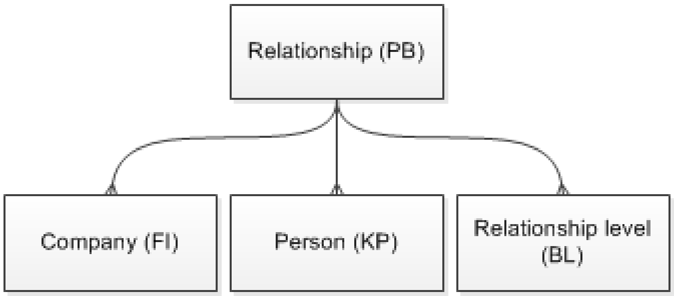
There are special table captions to display detailed information next to the tree:



Used table captions:

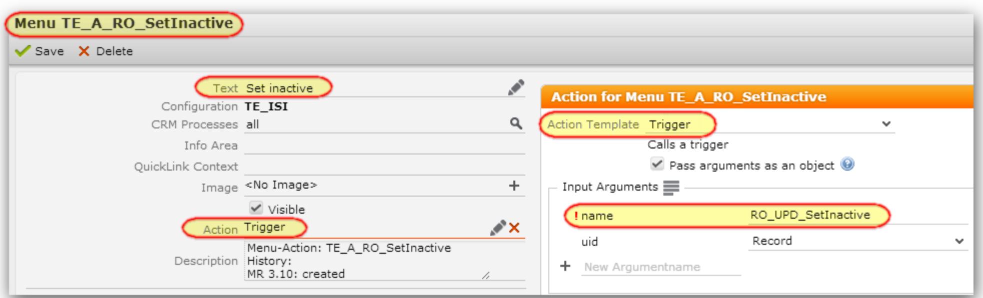
- FI.CoI
- KP.CoI

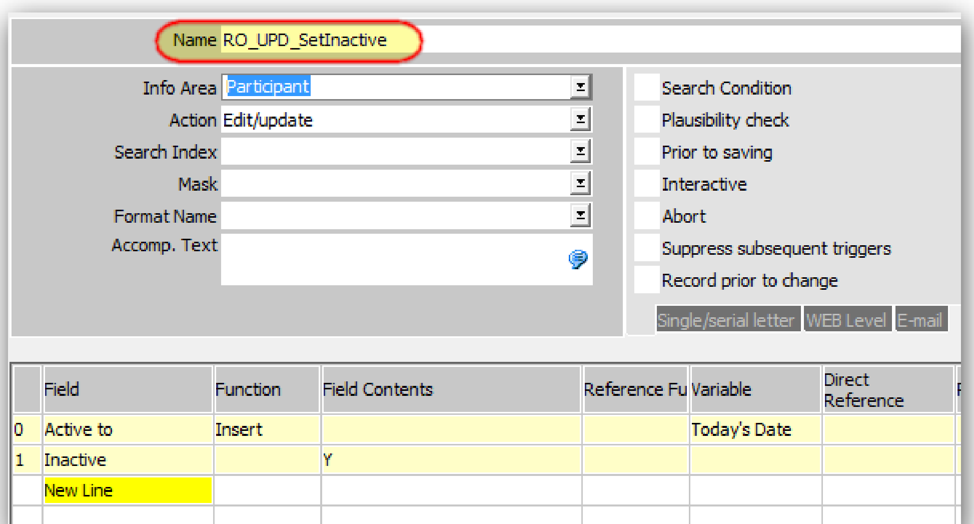
Relationship Management (CRM 50001400)



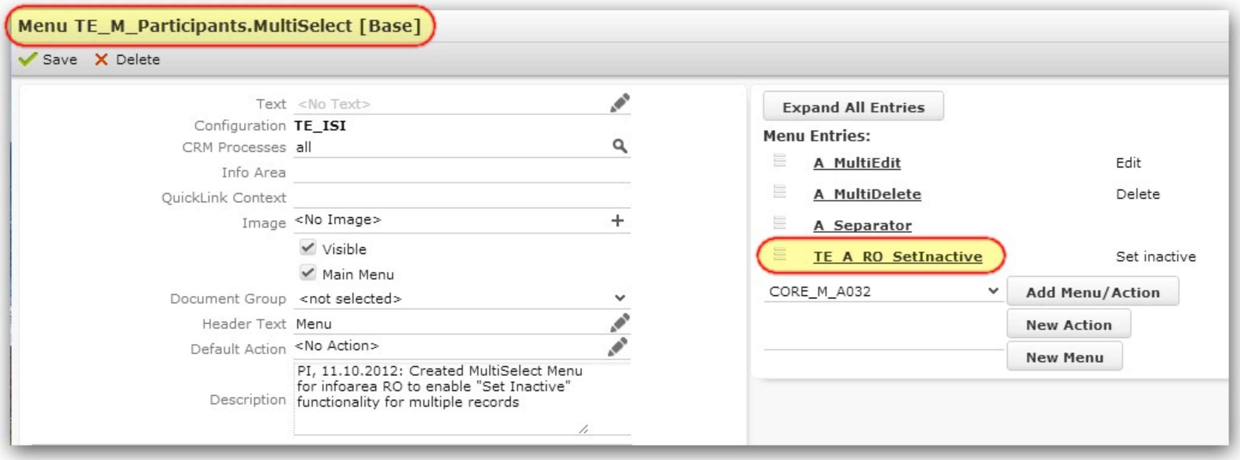
A new menu “TE_M_Participants” has been created.

This menu contains the “TE_A_RO_SetInactive” menu action which calls the “RO_UPD_SetInactive” trigger to set the “active to” date and the inactive flag of the selected record(s).





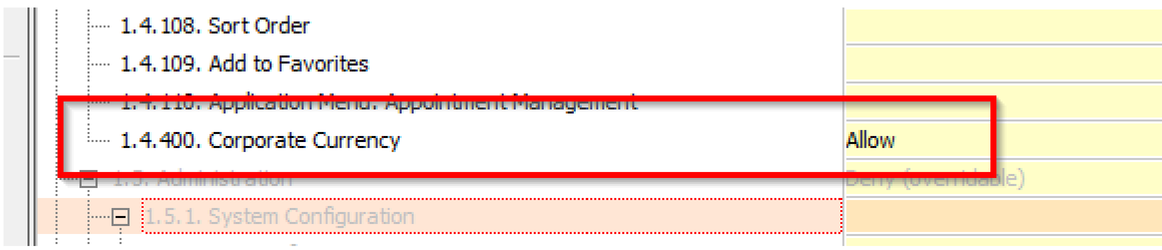
A new menu “TE_M_Participants.MultiSelect” has been created to enable the “Set Inactive” functionality for multiple records in a list. Attention: The menu name must contain “.MultiSelect”



Reporting Currency

Learn about the new reporting currency implemented for certain infoareas.

To activate the feature please activate the following CRM Process:



The new Reporting Currency feature has been implemented fort he following infoareas/fields:

Info area	Field #	Reporting Field #	Field
Opportunity	Y1/145 Y1/147	Y1/5046 Y1/5047	Total Product Value Wtd. Total Product Value (Opportunity)
Opportunity Product	Y5/6 Y5/10	Y5/5000 Y5/5001	Product Value Wtd. Product Value (Opportunity)

Info area	Field #	Reporting Field #	Field
Offer	PR/13 PR/167	PR/5046 PR/5047	Offer Value Offer Value incl. VAT
Offer Position	AP/19 AP/112	AP/5026 AP/5027	Item Value Item Value incl. VAT
Order	AU/11 AU/140	AU/5006 AU/5007	Order Value Ord. Val. Incl. VAT
Order Item	UP/17 UP/87	UP/5001 UP/5002	Item Value Item Value incl. VAT
Property	OJ/26	OJ/5038	Order Value
Product	OP/2	OP/5001	Price
Service Offer	TPR2/13	TPR2/5046	Offer Value
Service Report	TPR3/13	TPR3/5046	Offer Value
Service Contract	WR/20 WR/21	WR/5007 WR/5008	Service Amount Service Flat Rate

Info area	Field #	Reporting Field #	Field
Potential	PO/5	PO/5001	Revenue

The three following reporting currency fields are the across all implemented infoareas:

Field #	Field
4024	Reporting Currency
4025	Reporting Currency Rate
4026	Reporting Currency Date

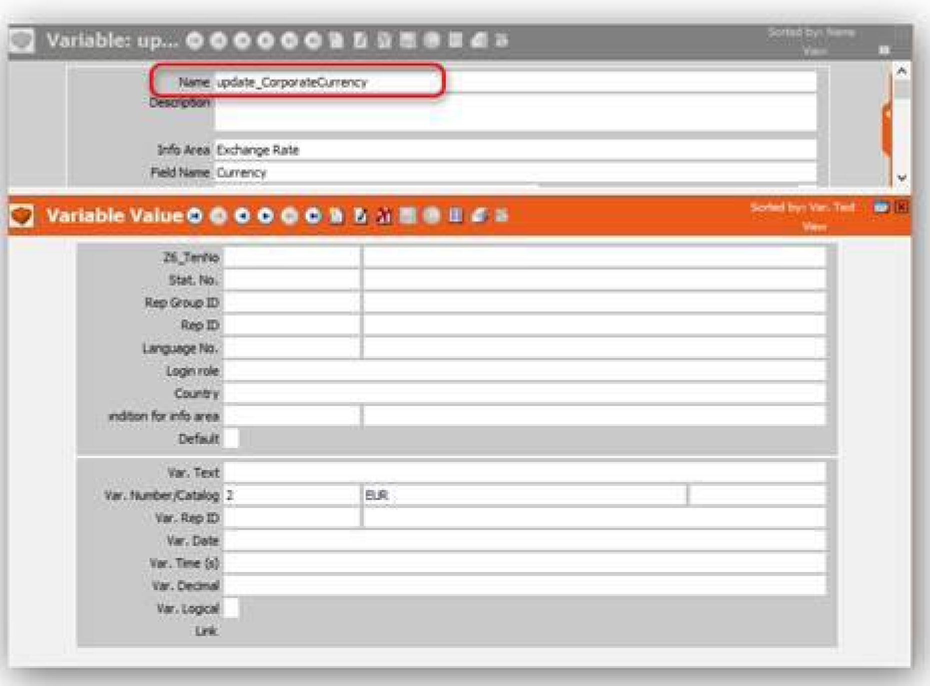
To use the corporate currency fields you need to execute a maintenance run on the Reporting Currency Rate field (4025). This maintenance run needs to be executed for all info areas used in your project with the new corporate currency field.

Also, all reports which used the above fields where changed to display the reporting currency field.

If you do not want to use the corporate currency in your project, add a variable value for the update_CorporateCurrency

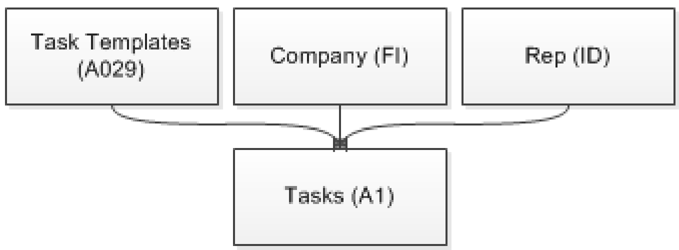
variable using the currency of your project.

After doing this, the exchange rate is automatically set to 1 and the value in both fields is the same.



Task Management (CRM 70000020)

Learn to manage task templates and task filter buttons.



The standard functionality for editing tasks is used in template version 2. Threrefore the following items are reused:

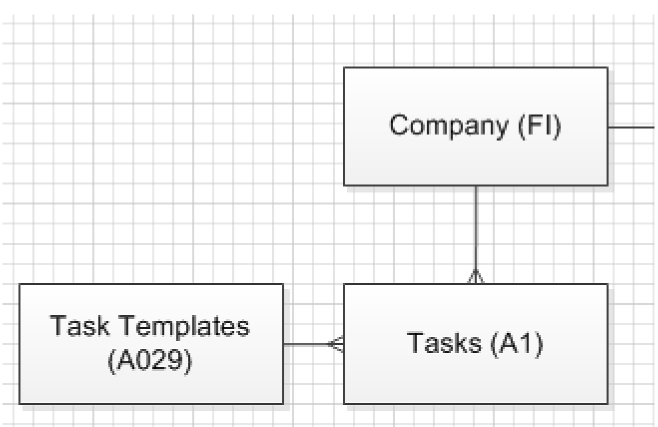
Menus:

- D_ToDoStatus
- D_ToDoParticipationStatus

Actions:

- A_ToDoCompleted
- A_ToDoMissed
- A_ToDoAccepted
- A_ToDoDenied

Task Templates



9	4016	Updated at	me(hh:mm:ss.ttt) T	Update
10	6001	Type	fix catalog	
11	6002	Single Task	y/n	
12	6003	Status	fix catalog	
13	6004	Priority	fix catalog	
14	6009	Templatename	text(100)	
15	6010	Subject	text(150)	
16	6011	Text	text(1000)	

Templates for the Task (A1) info area were implemented. Task templates are stored in the A029 info area. Each field which was defined in A029 corresponds to a field in A1.

The Template field in A1 is as follows:

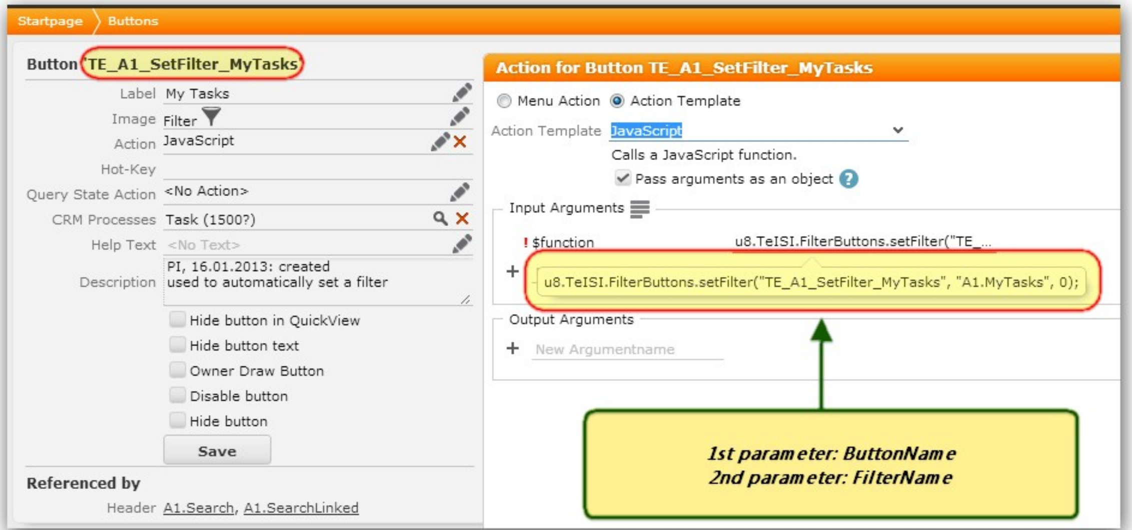
120	5000	Connector delete	y/n	
121	5001	Status	var catalog	
122	6000	Template	text(100)	
123	6001	Rejected by	uid	Rejecte
124	6002	Rejected by (Nar	reference (uid)	Rejecte
125	6003	Rejected by grou	uid	Rejecte
126	6004	Rejected by grou	reference (uid)	Rejecte

A Select function is configured in the ‘A1’ details mask for the ‘Template’ field which will copy the fields from A029 to the corresponding A1 fields. If you want to add a new field to the template, you need to add it in the data model and configure the Select function to copy the A029 field to the correct A1 field.

Task Filter Buttons

Three new buttons have been created:

1. TE_A1_SetFilter_MyTasks sets a filter
2. TE_A1_SetFilter_MyTasksToFinish sets a filter
3. TE_ClearFilter removes the current filter



Two new filters have been created:

1. A1.MyTasks
2. A1.MyTasksToFinish

A new JavaScript file has been added:

-isifilterbuttons.js □□\web\web\scripts\te.isi

Timeline(CRM 2480000)

The Timeline has been implemented in the FI, Y1 and OJ (‘TE_M_Timeline’ context menu & header in the expand mask/process) info areas.

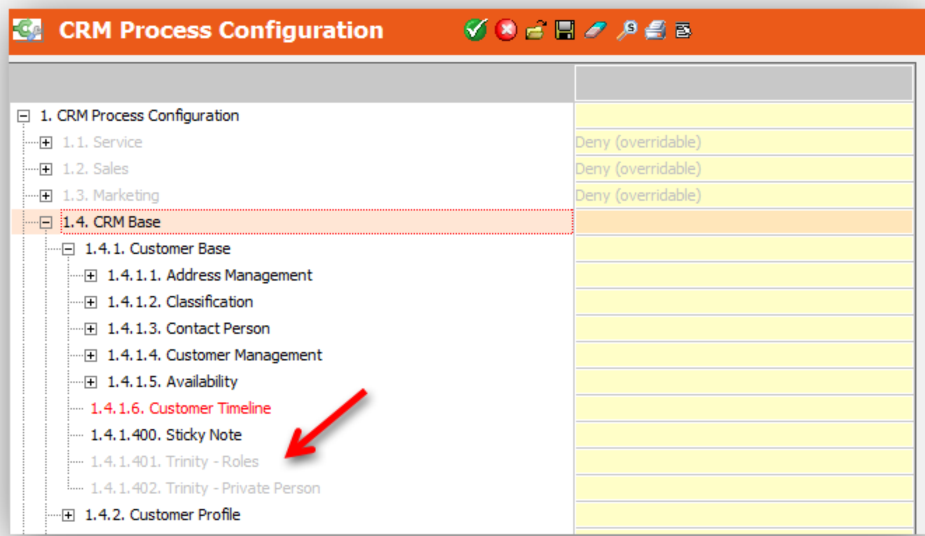
The ‘TE_M_FI_Timeline’ company context menu holds an additional ‘A_Marketing-Timeline’ action. It is also possible to open a Search&List with all timeline notes of the selected record with the ‘TE_A_TimlineComments’ action.

Trinity

Explore the possibilities of selecting more than 1 value for a catalog.

Crm Processes

We created 2 new processes which can be activated separately. As you can see on the screenshot both processes are delivered deactivated:



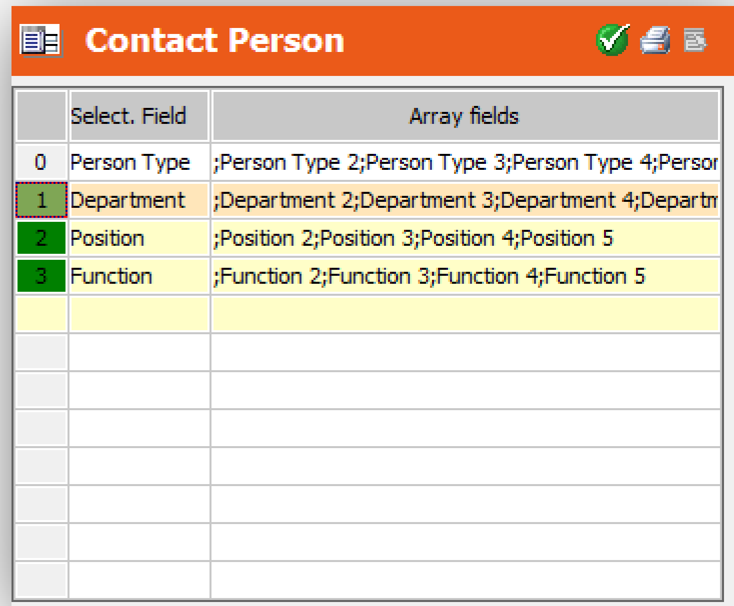
Datamodel Changes

It is possible that a person has more than 1 function in a company so we extended some catalogs. Which catalog is used in the project can be decided by the customer. For the following catalogs it is possible to select more than 1 value:

-Department(KP.11, KP.5020, KP.5021, KP.5022, KP.5023 | CP.16, CP.5012, CP.5013, CP.5014, CP.5015)

-Position(KP.12, KP.5012, KP.5013, KP.5014, KP.5015 | CP.17, CP.5004, CP.5005, CP.5006, CP.5007)

-Function(KP.13, KP.5016, KP.5017, KP.5018, KP.5019 | CP.56, CP.5008, CP.5009, CP.5010, CP.5011)



Quicksearch

We're delivering a file for the quicksearch definition which is located in the following folder:

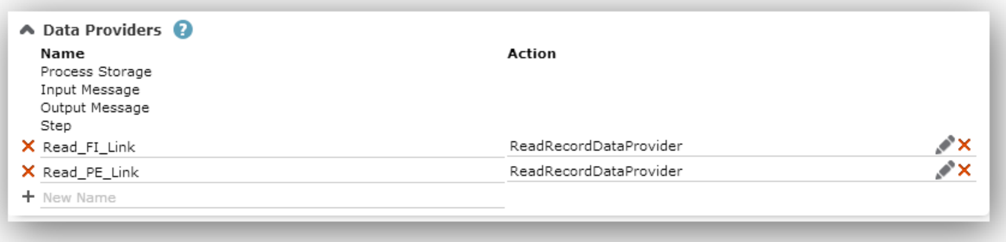
`\web\data\settings\te.isi\TE_QuickSearch.json.js`

Fact is, that we're delivering trinity deactivated so we're also delivering the quick-search definition for the infoarea PE deactivated, as you can see in the JS file.

Processes & Forms

Learn how to create new records and processes.

Open records in a tree

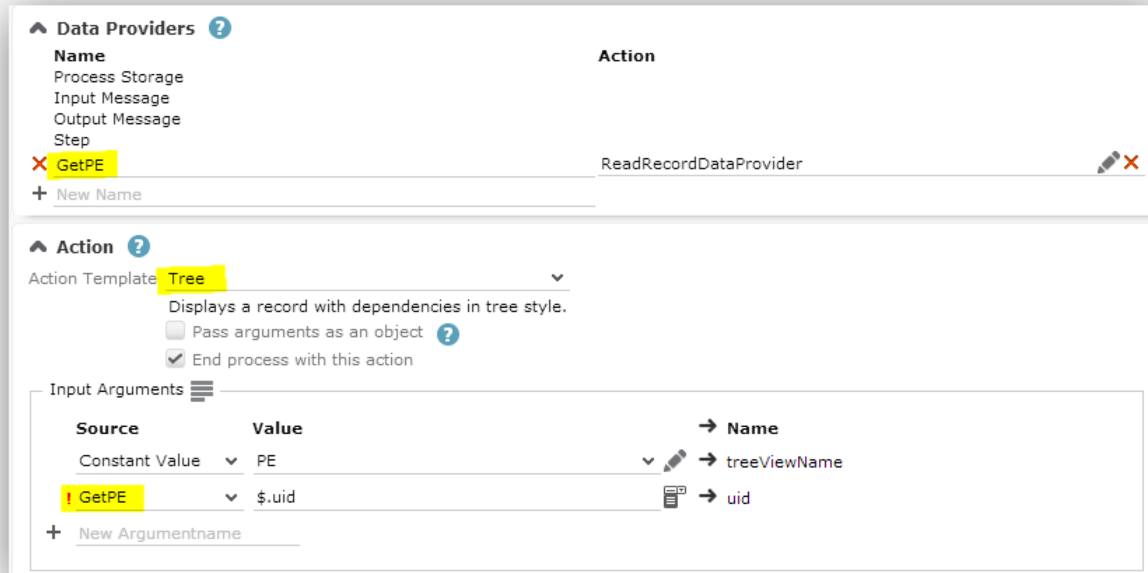


We modified the existing process "TE_OpenRecordInCompanyTreeview” because a record which is linked to a person (PE) should open the person (PE) tree. We created a new process step called “TE_OpenRecordInCompanyTreeView_ReadLinks” where the FI and the PE links are read.

In the dispatching area we check the links and call the process step “TE_Open-RecordInCompanyTreeview_Open” with different parameters.

Open PE from KP

A new menu action "D_KP_OpenPE” is visible at the “M_Person” menu and allows the user to open the PE record out of the KP record. The menu action calls the process “TE_KP_OpenPE” which has only 1 process step. In this step we search for the PE record and display it, as you can see on the screenshot:

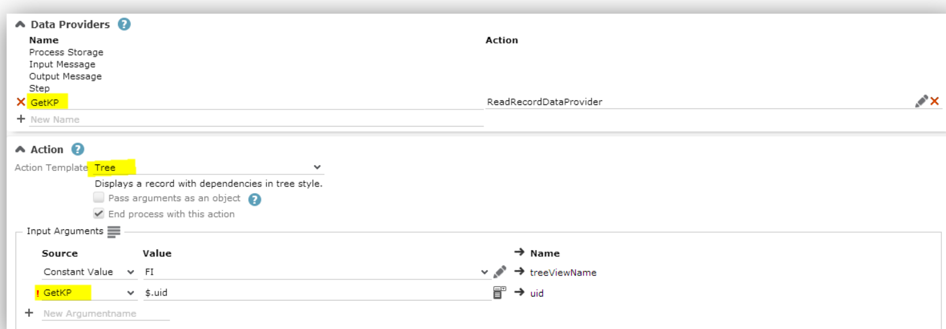


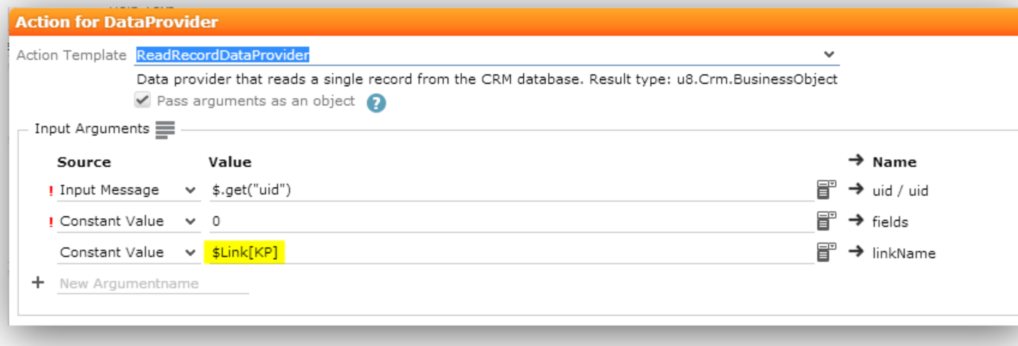
The menu action is disabled if the field #86 at linked person record is set to false

This is done by via javascript. You can find the code having a look at the “isidynamicmenuactions.js”

Open KP from CP

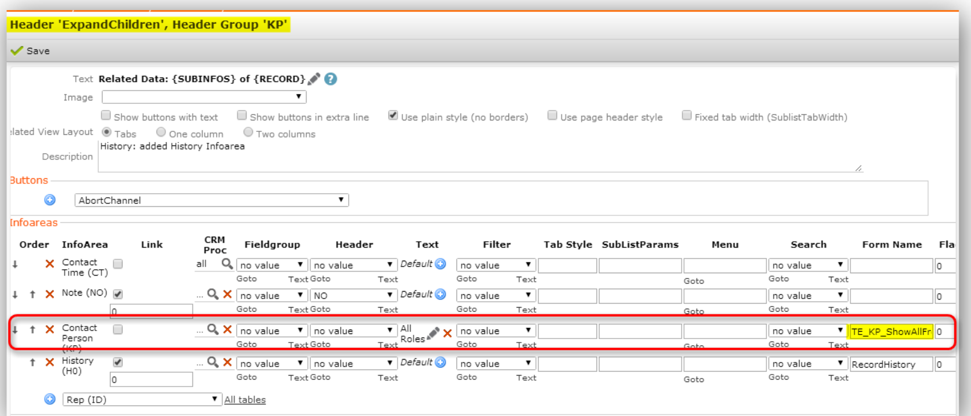
We created a new menu action "TE_A_CP_OpenKP “ which is used as default action for the infoarea CP. The action calls the process “TE_CP_OpenKP” which searches for the KP record and opens it in the company treeview.



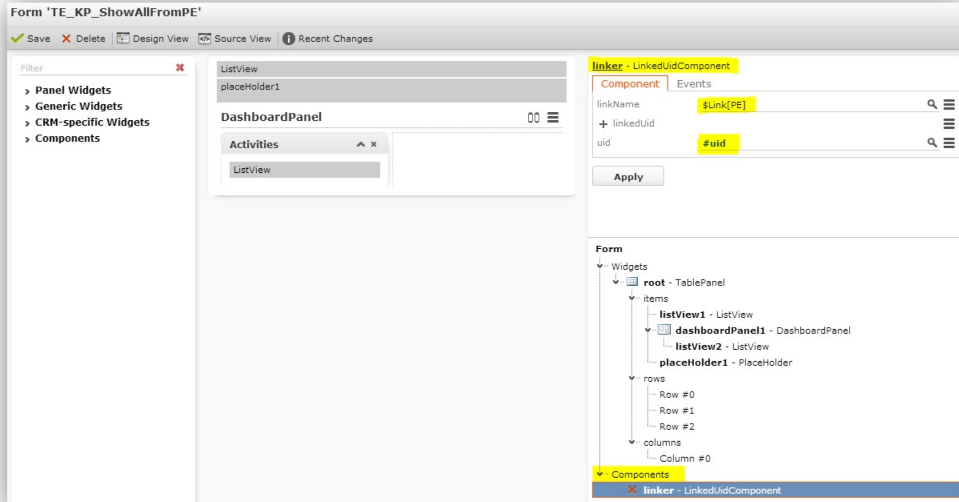


Show all CP records in KP sublist

In the sublist of a KP record in the FI tree, we're displaying a new tab which shows the form "TE_KP_ShowAllFromPE". In this form we want to display all CP records of the linked PE record.



Therefore the first thing we have to do is so search the PE record. This is done via the LinkedUidComponent in the form itself.

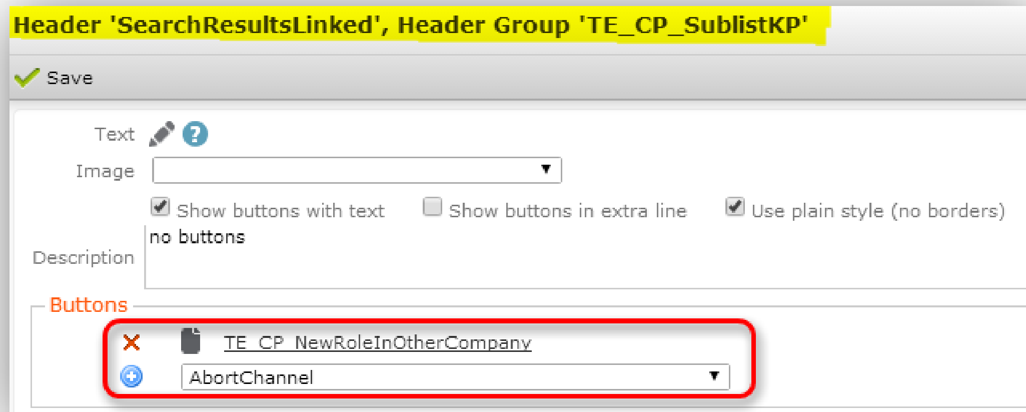


As you can see on the scrrenshot below, the listview takes the PE record from the Component and uses it as link. Therefore only CPs which are linked to this person (PE) are displayed.

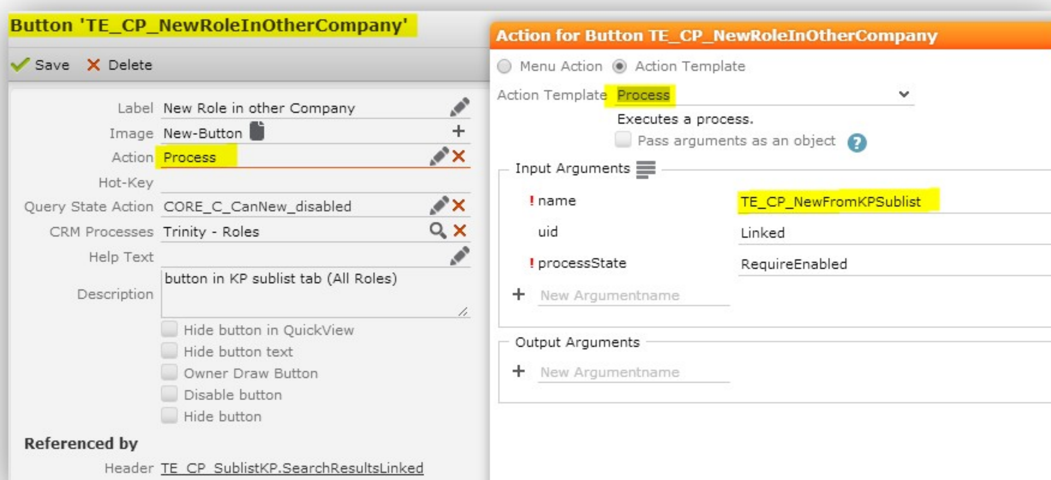
```
"listView1": {
  "type": "ListView",
  "options": {
    "model": { "fieldGroupName": "TE_CP_SublistKP", "includeConditionalRights": true, "pageSize": 5, "maxRows": 50 },
    "autoLoad": true,
    "header": { "headerGroupName": "TE_CP_SublistKP", "headerName": "SearchResultsLinked" },
    "selectionMode": "single",
    "canEdit": false
  },
  "binding": [
    {
      "targetPath": [ "model", "link" ],
      "designerValue": {},
      "sourcePath": [ "$component(linker)", "@linkedUid" ]
    }
  ]
},
```

New CP from KP

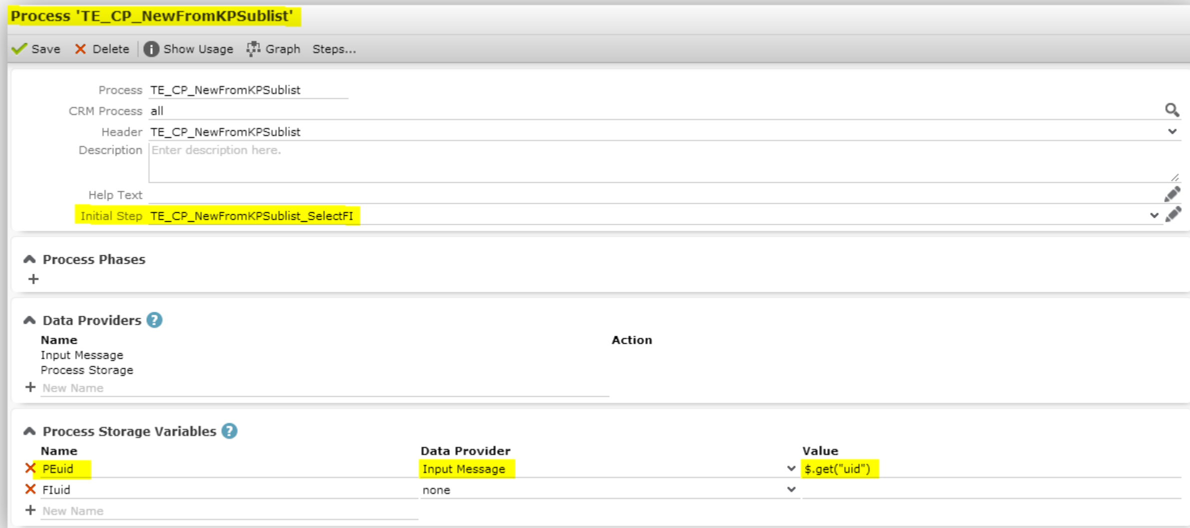
To make it possible to create new CP records out of a KP, we created a new button called “TE_CP_NewRoleInOtherCompany” and display it in the form mentioned above.



This button calls the process "TE_CP_NewFromKPSublist" which allows us to create new CP records.



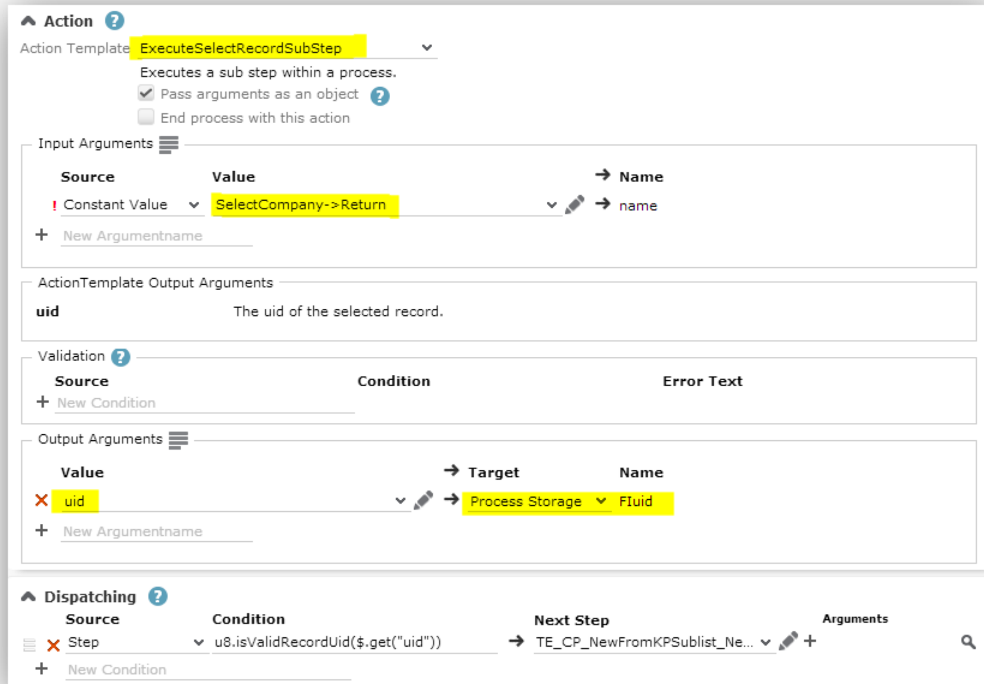
The process itself looks like this:



At first we're storing the person record in the process storage variable "PEuid"

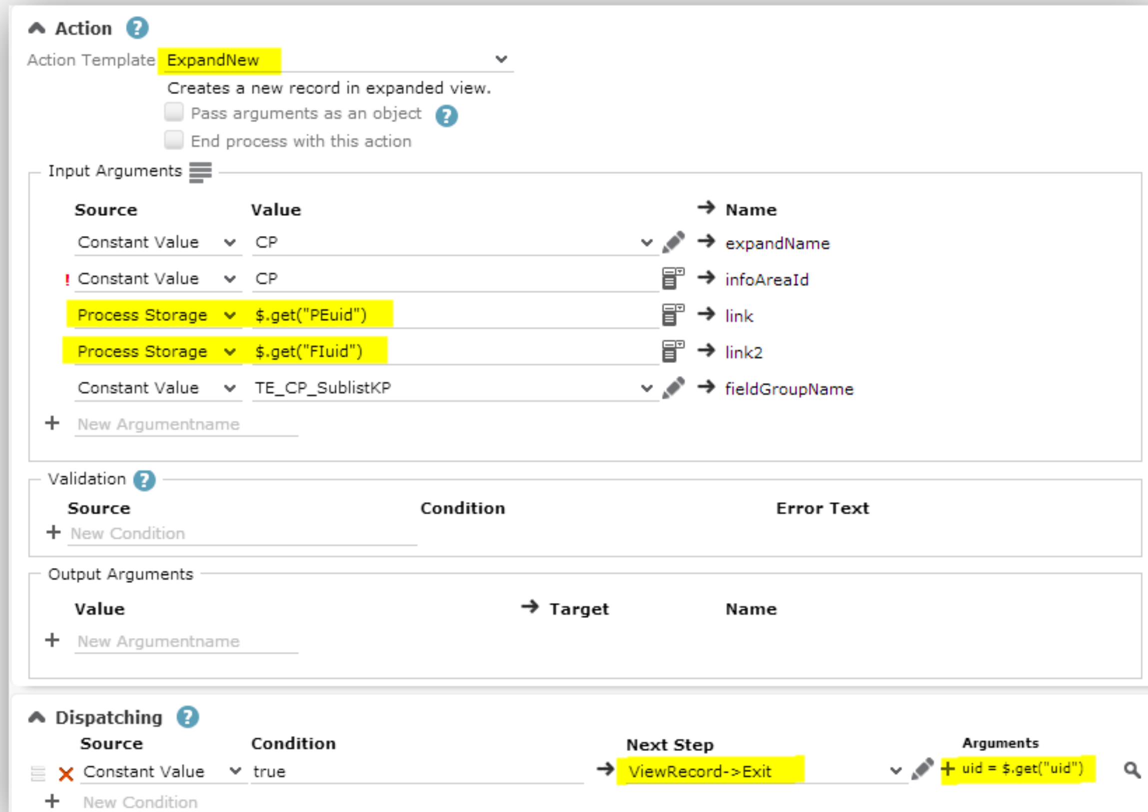
The first process step "TE_CP_NewFromKPSublist_SelectFI" calls a substep, where the user can select or create a company. After doing this, we save the company record in the process storage variable "FIuid"

Furthermore we're dispatching to the next step ("TE_CP_NewFromKPSub-list_NewCP")



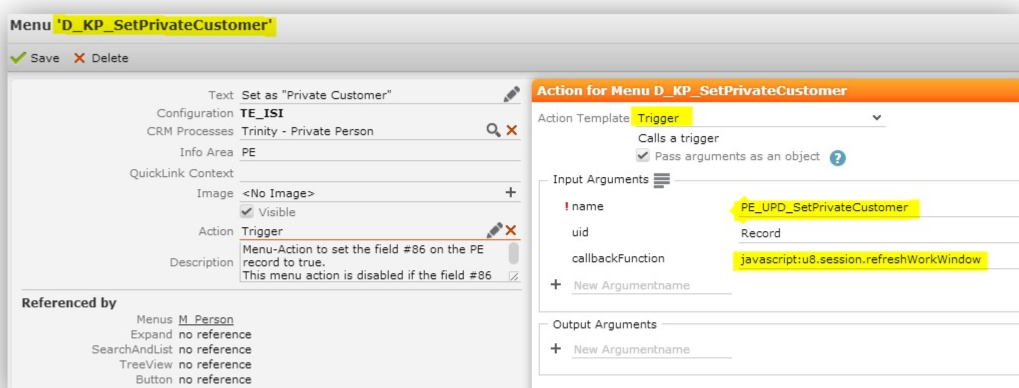
In the second step of the process we’re displaying the new CP mask, using the “PEuid” and “FIuid” as link records.

After creating the new CP record, we’re opening the record, by using the default action of the infoarea.



Set as Private Customer

We created a new menu action called “D_KP_SetPrivateCustomer” to allow the user to set the contact person as “private customer” too. This is done via this dynamic menu action:



The action is disabled if the field #86 at the linked PE record is already set to “true” This is done in the script “isidynamicmenuactions.js”. Furthermore the action is calling a trigger which sets the field #86 to true. Afterwards the workframe gets refreshed.

Changed Processes

In version 5 of the template we changed only one process to fit the trinity concept. All other processes will be changed in version 6.

The process we changed is the “NewAppointment” process. We added 2 new steps to allow the user to select PE records too. Process steps:

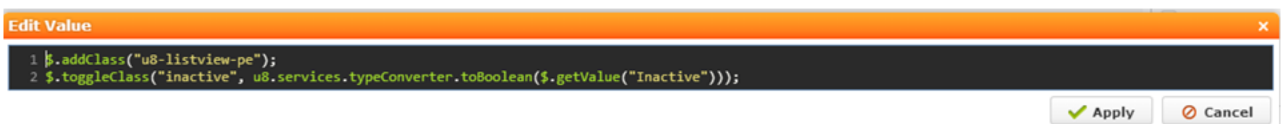
- TE_PE_SelectPersonOrNew
- TE_PE_New

Furthermore we enabled the button “ParticipantsAddPE” so that it is possible to add PE participants to an activity.

Active/Inactive

Learn how to know whether the record is active or inactive.

To show whether a record is active or inactive we added renderhooks to all lists. (Infoareas: FI, KP, CP, PE)



Furthermore we changed the sort order in lists and set some default values for the application menu search.

We also changed the tablecaptions to fit the active/inactive logic.

Upgrading to template version 5

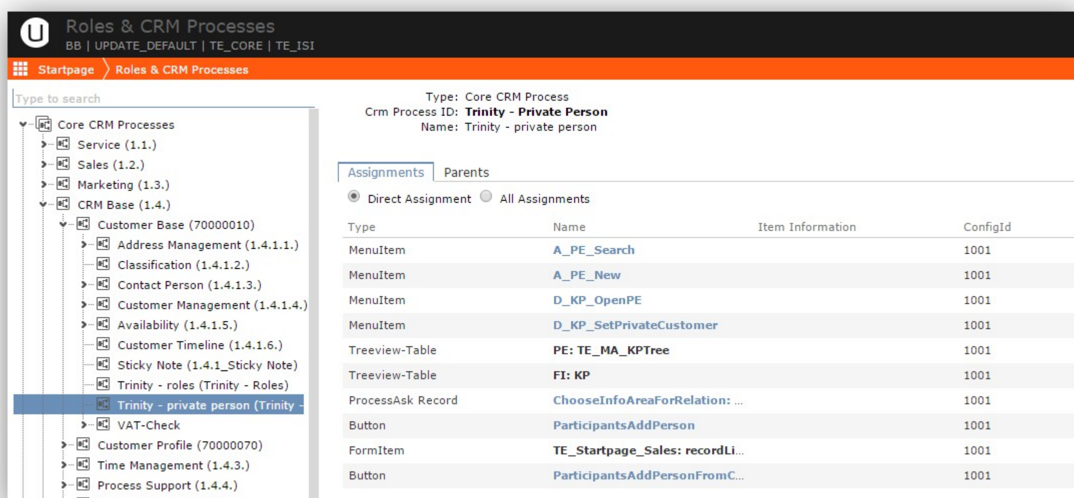
Learn how to upgrade to template version 5.

Steps you have to do:

- Patch your system to the latest WIN version (8.2.8.2568 or higher)
- Patch you system to the latest WEB version (8.2.8.2574 or higher)
- Patch cockpit to the latest version (8.2.8.4549 or higher)
- Upgrade the template to version 5
- Check which parts of trinity your customer wants to use and activate the crm processes:
  - Trinity Roles
  - Trinity Private Customer

After upgrading to the template version 5 you have to compare the designer elements of your configuration to the TE_ISI configuration. Designer elements which have been copied to your config are not overwritten, so you might not see all changes.

To find all designer elements which are used for trinity, you can use a feature of the designer:



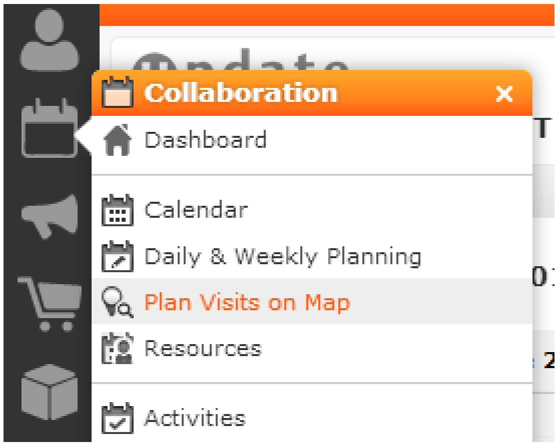
Visit Planning with map support

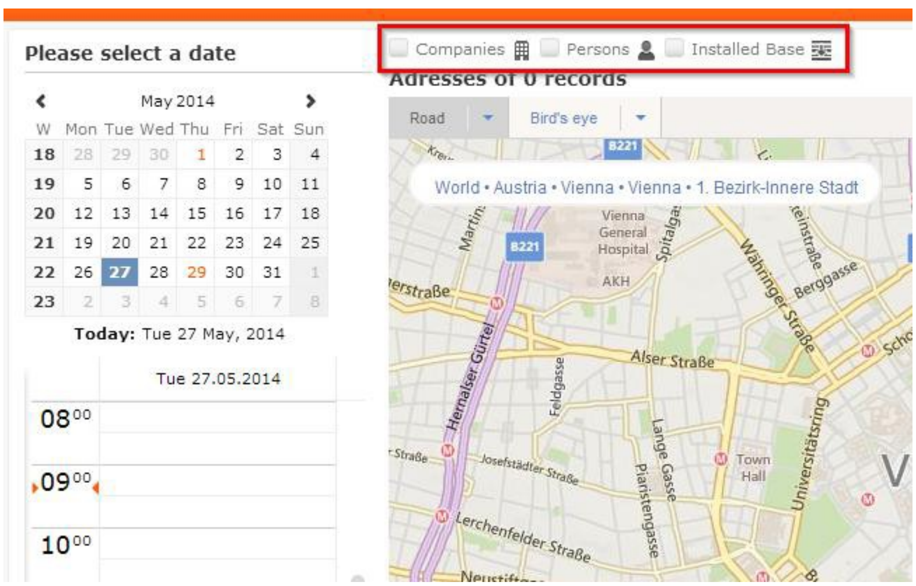
Learn to use map to plan your day.

Note: Attention: This feature does not exist in v6 or higher. This functionality is handled via the new standard feature.

You can use this feature using two different entry points:

- From the main menu for general usage:

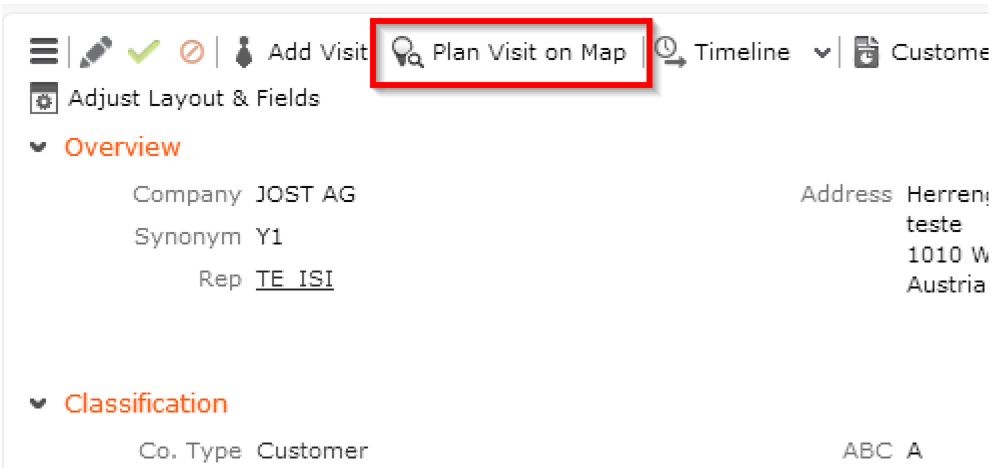


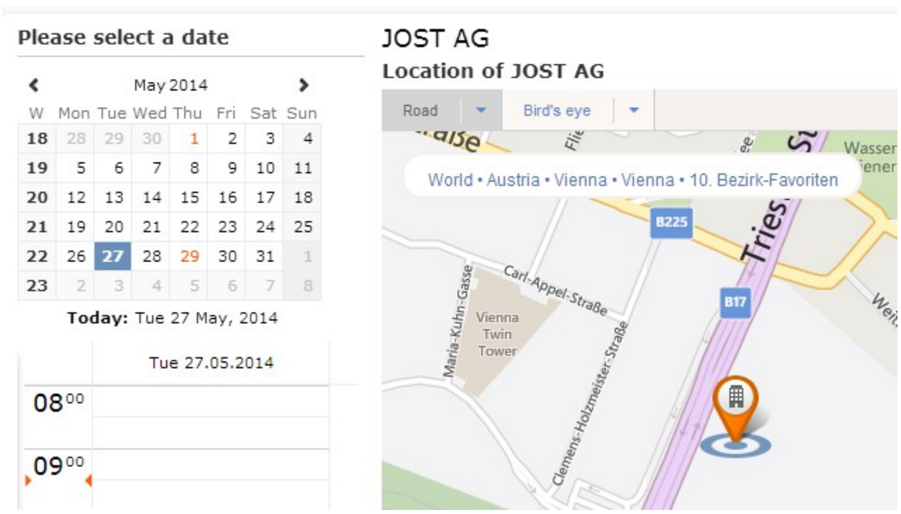


Here you can see all appointments today and you can select companies, persons and installed bases which you also want to see on the map, to have a general overview.

This view uses the menu ‘CORE_ID_NET_GeoPlanVisits’ which calls the form ‘CORE_GeoPlanVisits’.

- You can also open the map from a company, person or installed base to have the selected record in focus:





The selected record is in focus and you can plan your visit with the calendar on the left side. The button which is used is 'CORE_GeoPlanVisit' which calls the form 'CORE_A_GeoPlanVisit'.

The jscript used is '..\scripts\te.base\basegeoplanvisit.js', the following queries are used to select which records are shown on the maps:

TE_FI_GeoPlanVisit

TE_IB_GeoPlanVisit

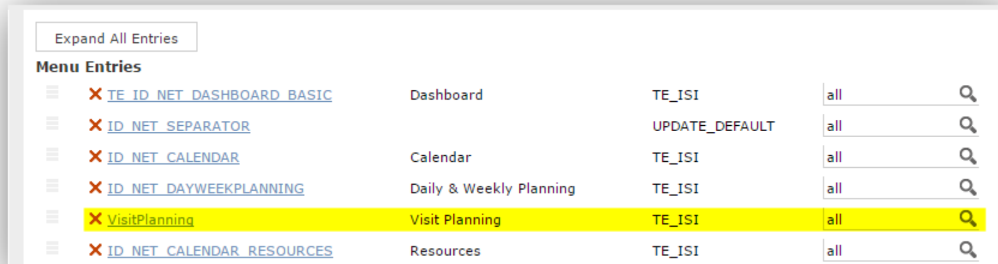
TE_KP_GeoPlanVisit

TE_MA_GeoPlanVisit

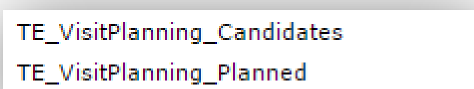
You can adapt these queries to further filter the results, but make sure that the fields which are already defined in the query, stay in the same order!

Visit Planning

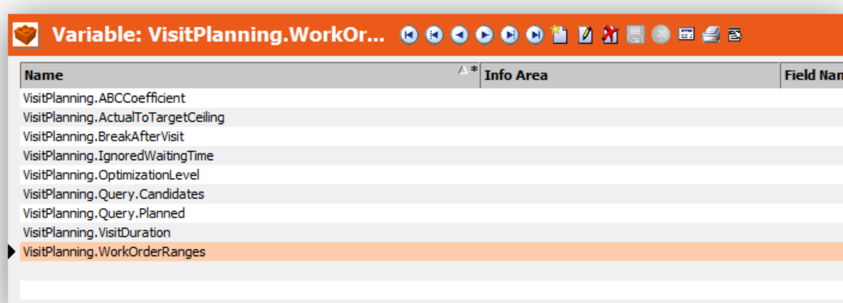
With version 6 of the ISI template we activated the standard feature which is delivered with SP3



Following queries are used to get the records which are already planned and the records which are suggested.



Following variables are delivered by the template, but can be changed of course.



3

Marketing

Here you can learn about the various marketing and sales related activities.

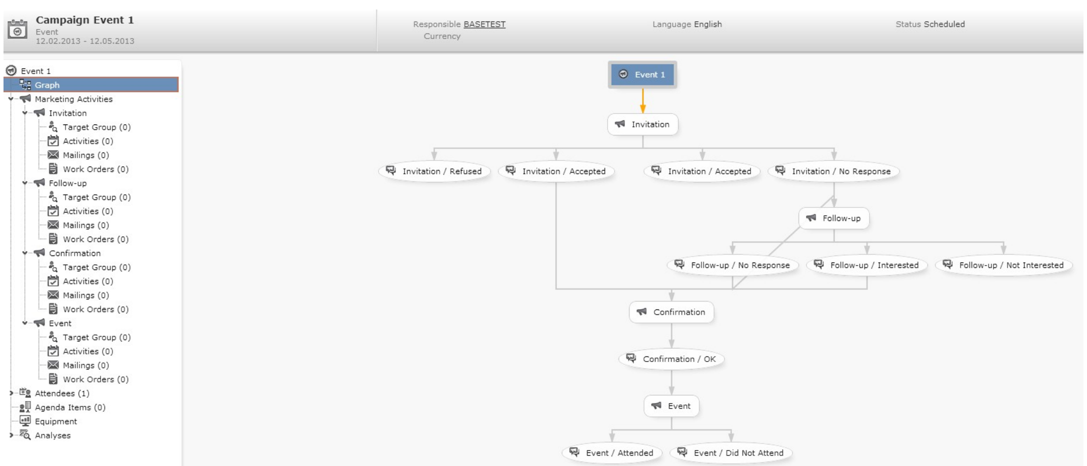
Marketing activity combines the active campaign for products with the aim to drive sales. Below topics discusses in detail the various activities that relates to marketing:

Campaign Management(CRM #70000080)

Learn about configurations for Campaign management.

Graph

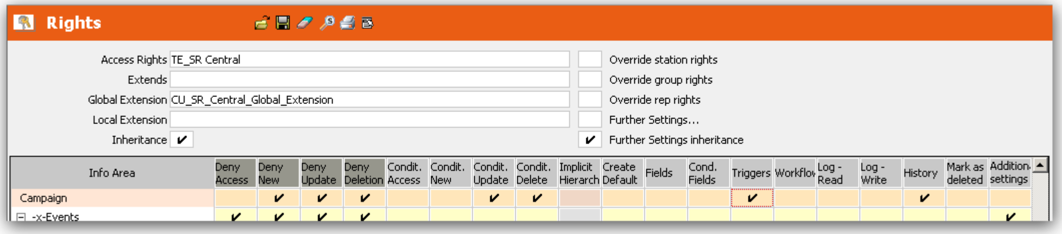
A campaign graph has been implemented into the tree to quickly navigate inside the campaign. The graph node shows the ‘CORE_CM_CampaignGraph’ form.



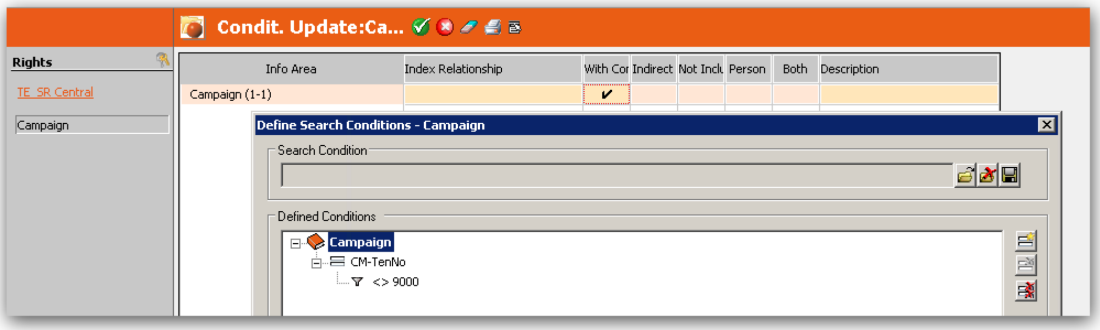
Rights & Triggers

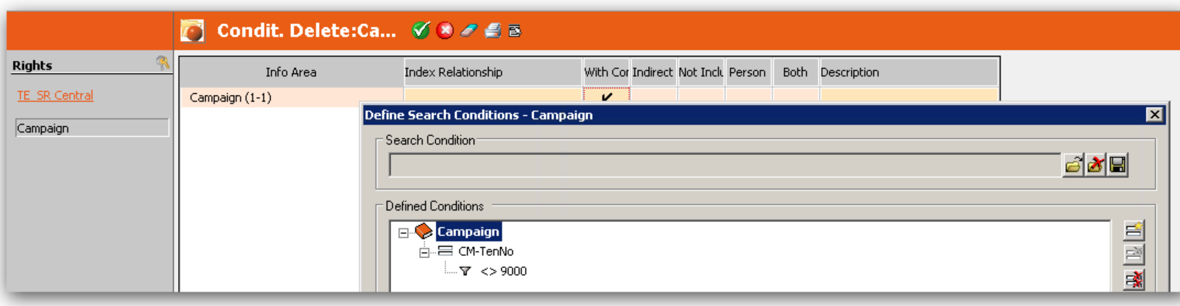
- **Rights for Info Area Campaign (CM)**

  The info area is defined in the main right as visible. New, update or delete of companies is not denied.



It is also defined that records with tenant 9000 are not allowed to be updated or deleted as they are part of the template and should be “upgradeable”.

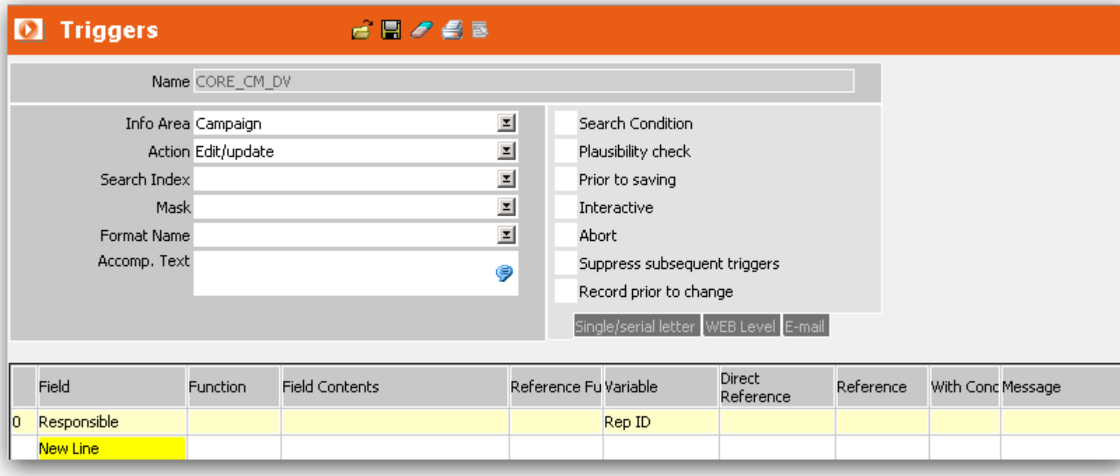




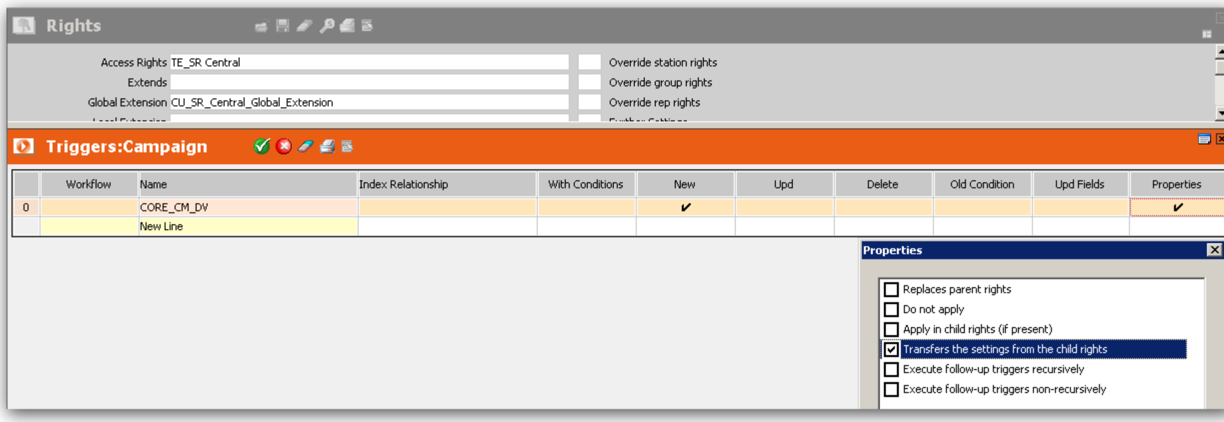
- **Trigger for Campaign (CM) Info Area**

  CORE_CM_DV Trigger

  This trigger is used to set the current rep as the responsible rep for the Campaign (CM) when the record is created. The action used is “Edit/update” (not default values) – as otherwise it would not work when records are created from a template.

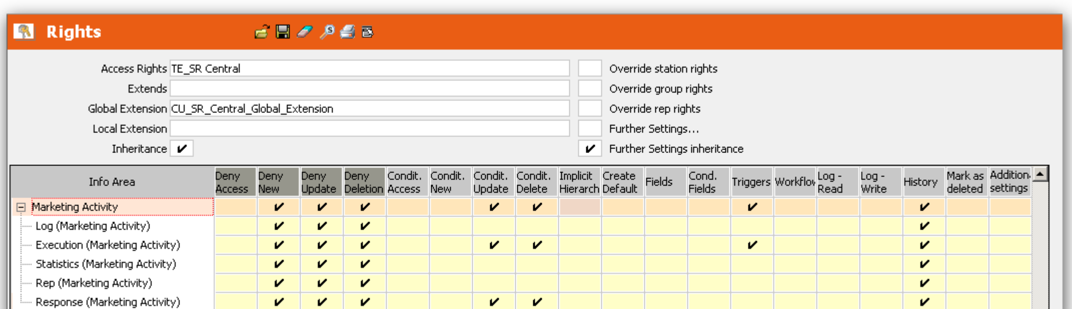


The trigger can be overwritten in a child right:

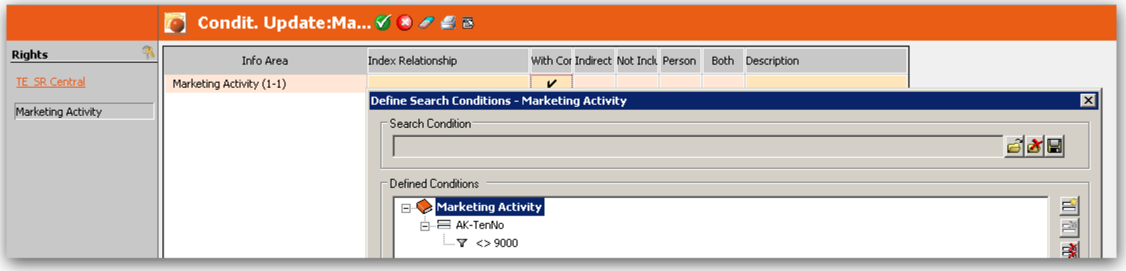


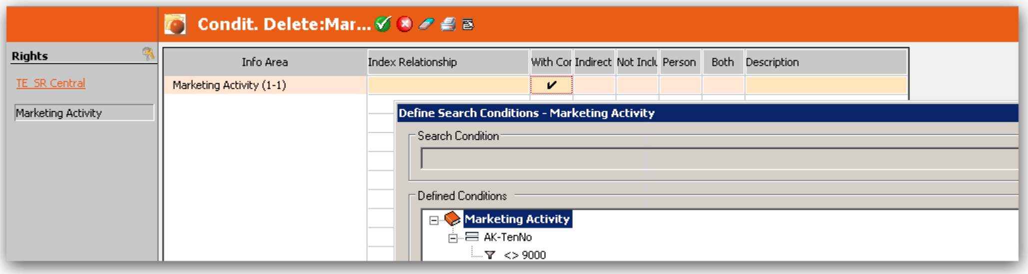
- **Rights for Marketing Activity (AK) Info Area**

  The info area is defined as visible in the main right but the actions new, update or delete are disabled for this infoarea.



It is also defined that records with tenant 9000 are not allowed to be updated or deleted as they are part of the template and should be “upgradeable”.

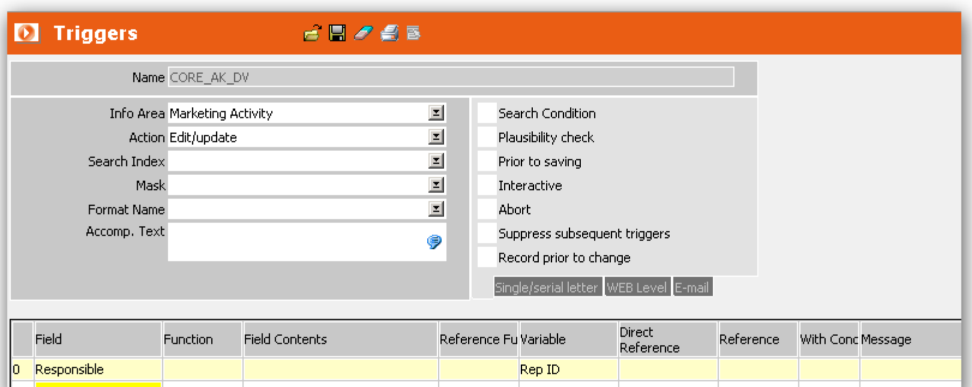




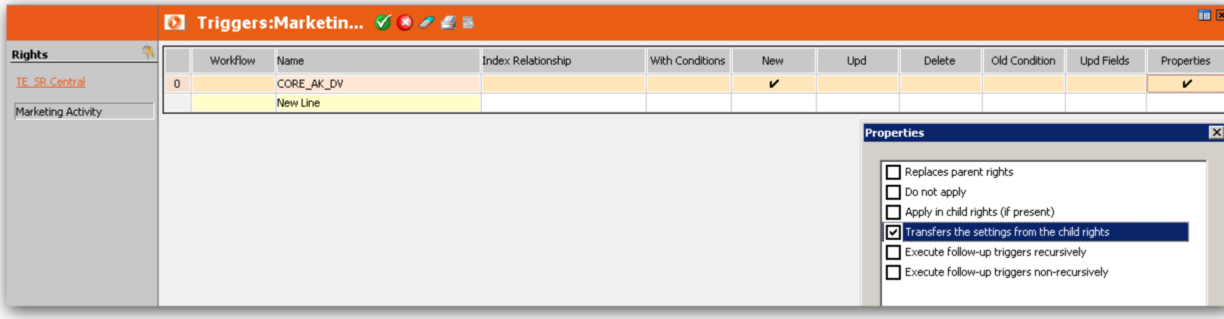
- **Trigger for the Marketing Activity (AK) Info Area**

  Trigger CORE_AK_DV

  This trigger is used to set the current rep as the responsible rep for the Marketing Activity (AK) when the record is created. The action used is “Edit/update” (not default values) as otherwise it would not work when records are created from a template.

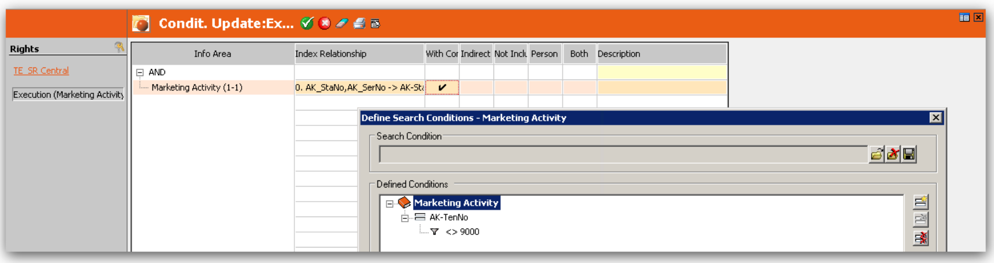


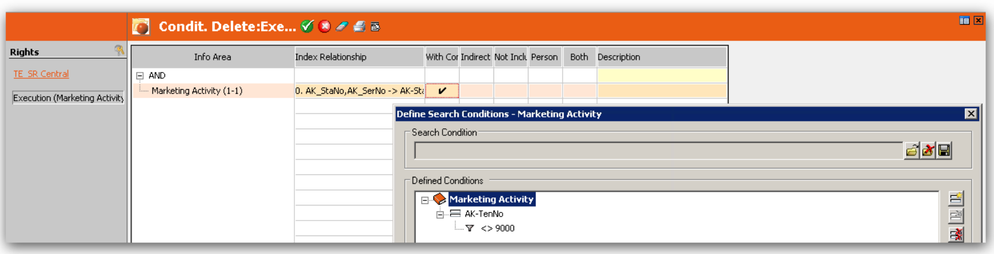
The trigger can be overwritten in a child right:



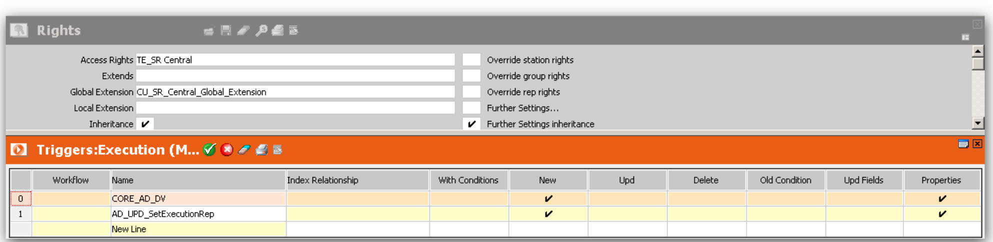
- **Rights for the Execution (Marketing Activity) (AD) Info Area**

  It is also defined that records that belong to marketing activities (AK) with tenant 9000 are not allowed to be updated or deleted as they are part of the template and should be “upgradeable”.



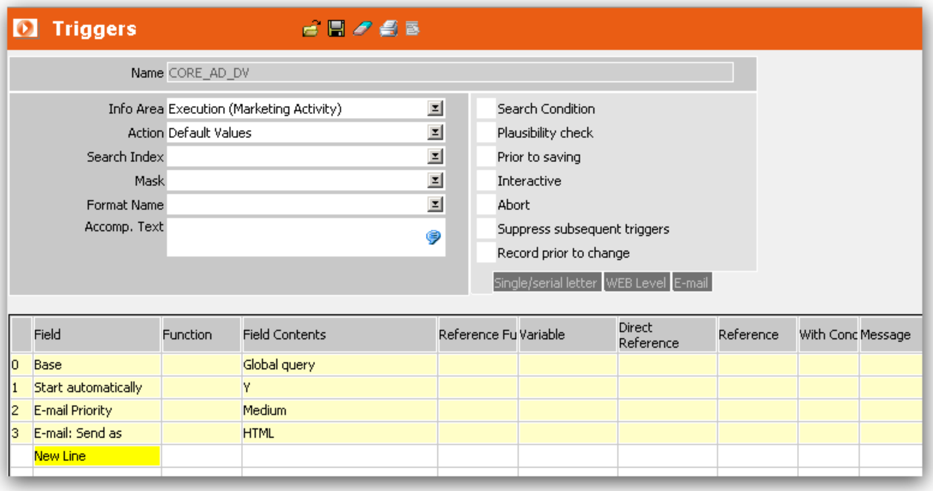


- **Trigger for Execution (Marketing Activity) (AD) Info Area**

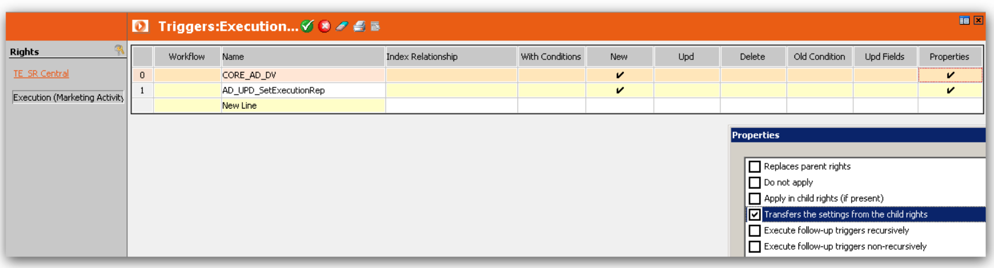


CORE_AD_DV Trigger

This trigger is used to set the default values when an Execution (Marketing Activity) (AD) is created that is NOT based on a template.



The trigger can be overwritten in a child right:

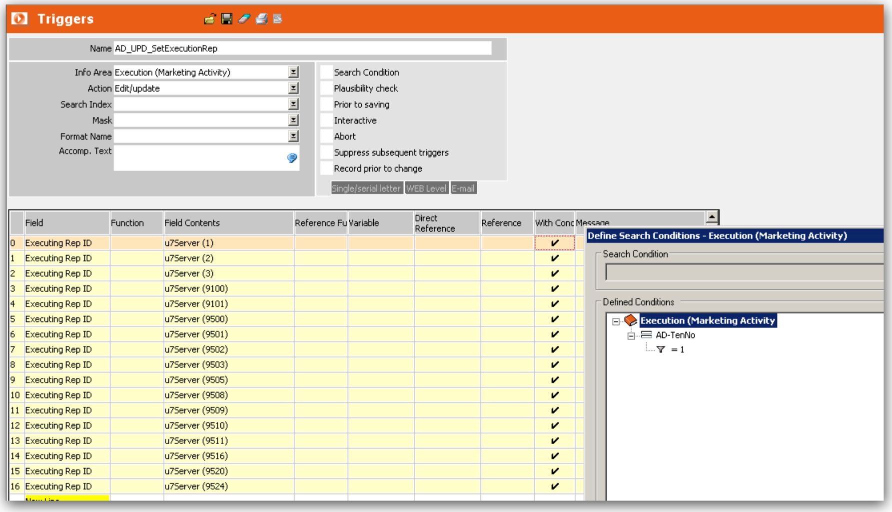


AD_UPD_SetExecutionRep Trigger

This trigger is used to set the u7Server user of the current tenant for the record. The action used is “Edit/update” (not default values) – as otherwise it would not work when records are created from a template.

The u7Server creates (among other tasks) messages and they are produced in a specified language (this language is set in the registry entry for the u7Server with the “–l” flag).

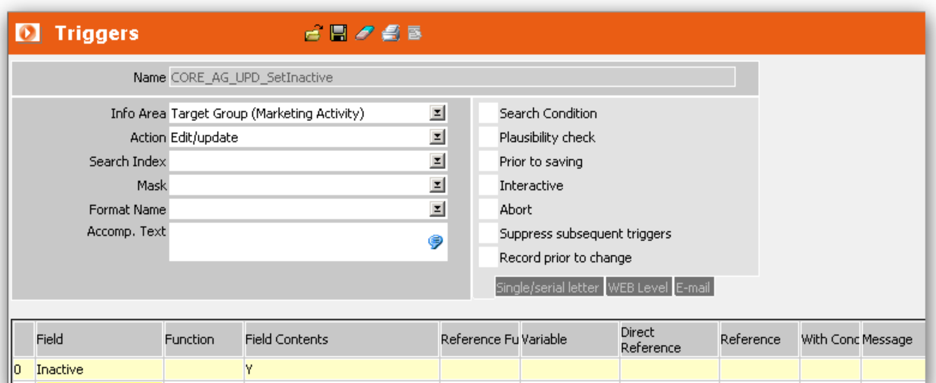
In a project: If a new tenant is created for an installation, then this trigger has to be adapted:



CORE_AD_UPD_ExecuteMarketingActivity Trigger

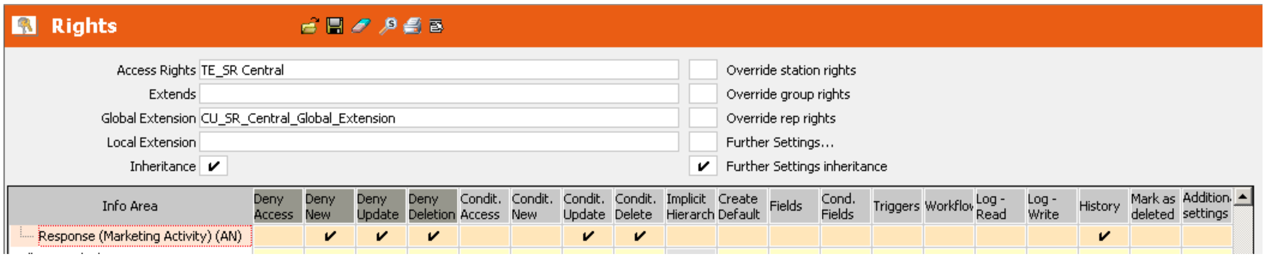
- **Trigger for Target Group (Marketing Activity) (AG) Info Area CORE_AG_UPD_SetInactive Trigger**

  This trigger is used to set the “Inactive” flag in an AG record. Thus the user does not have to touch each single record and set the flag, but he has to select several records and use the button. The trigger is called via the “CORE_AG_SetInactive” button.

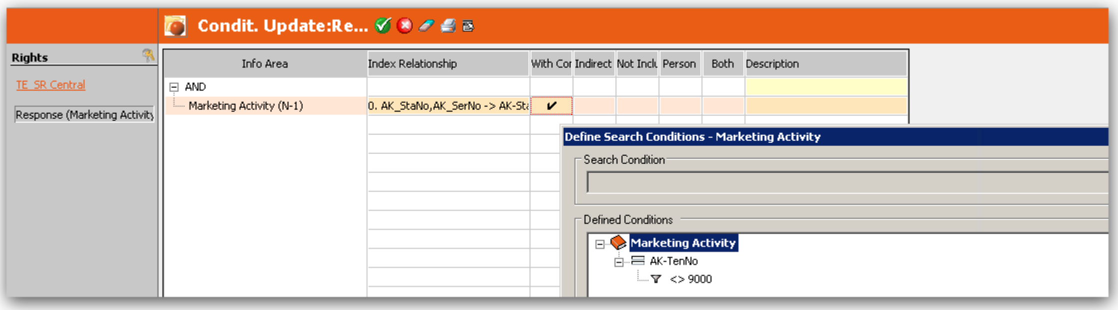


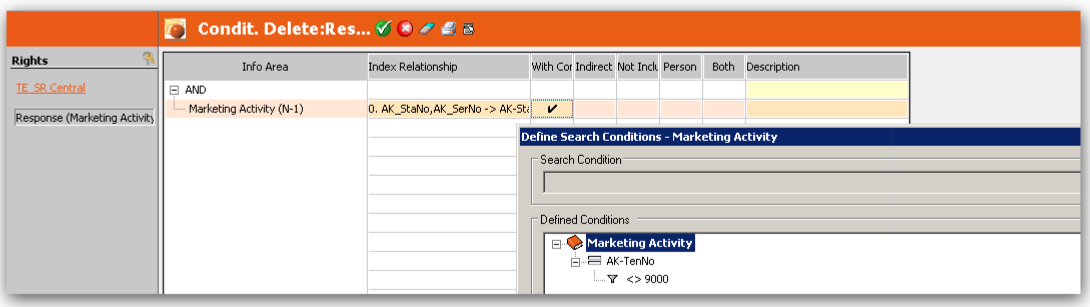
- **Rights for Response (Marketing Activity) (AN) Info Area**

  The info area is defined as visible in the main right but the actions new, update or delete are disabled for this infoarea.



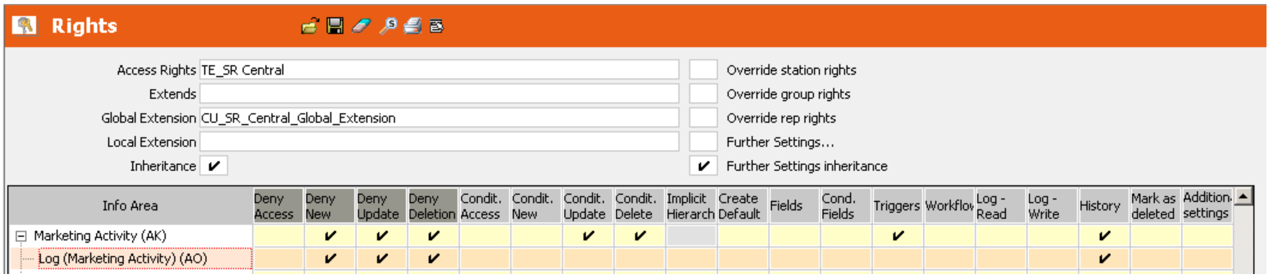
It is also defined that records that belong to marketing activities (AK) with tenant 9000 are not allowed to be updated or deleted as they are part of the template and should be “upgradeable”.





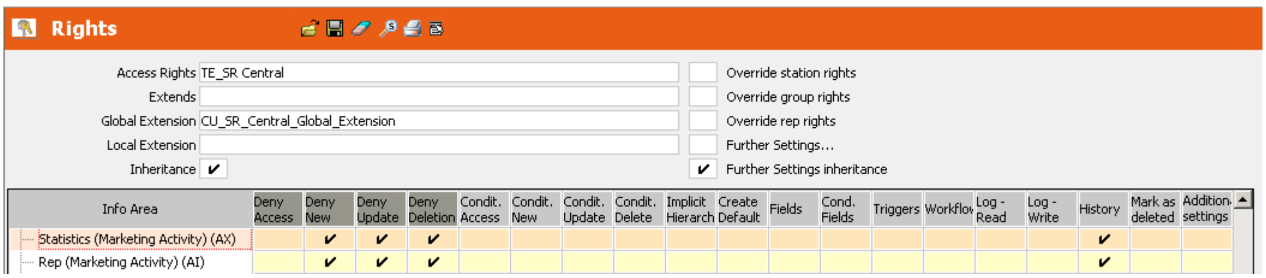
- **Rights for Response (Marketing Activity) (AO) Info Area**

  The info area is defined as visible in the main right but the actions new, update or delete are disabled for this infoarea.



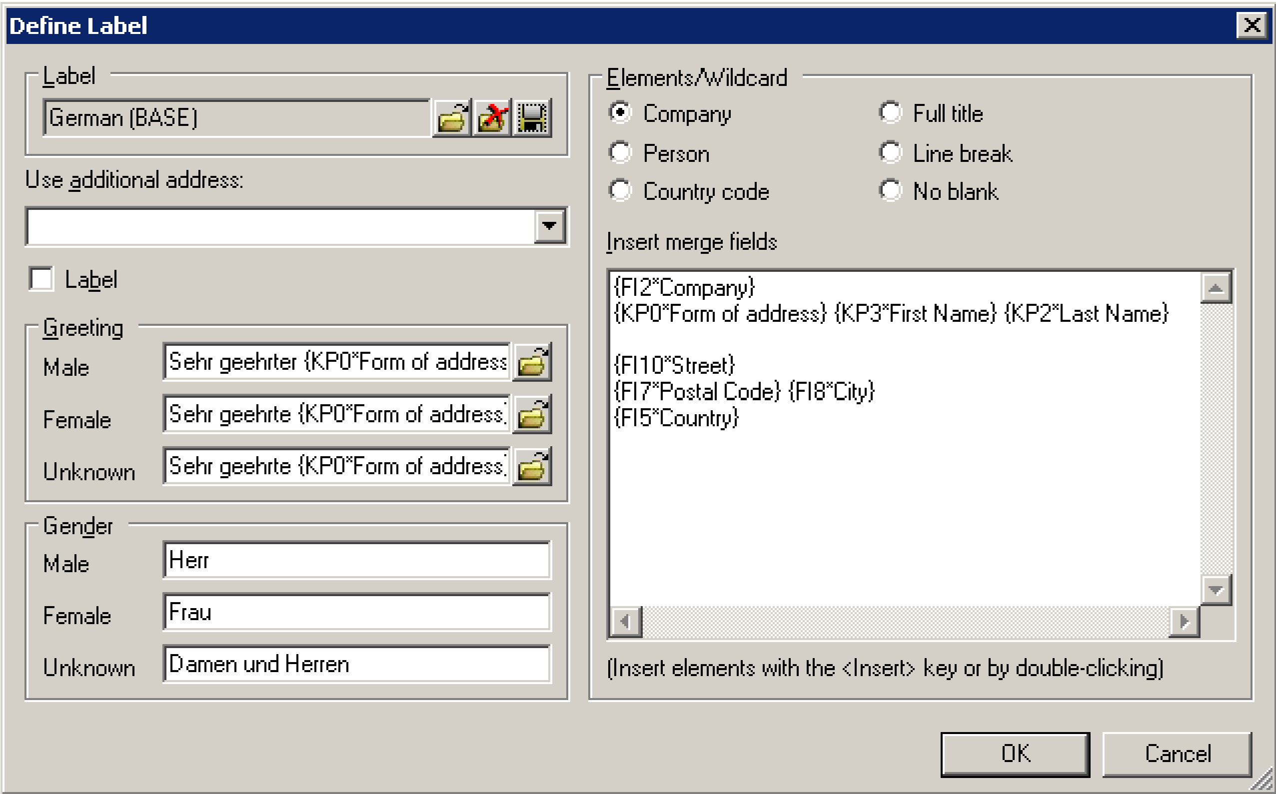
- **Rights for the Statistics (Marketing Activity) (AX) and Rep (Marketing Activity) (AI) Info Area**

  The info area is defined as visible in the main right but the actions new, update or delete are disabled for this infoarea.

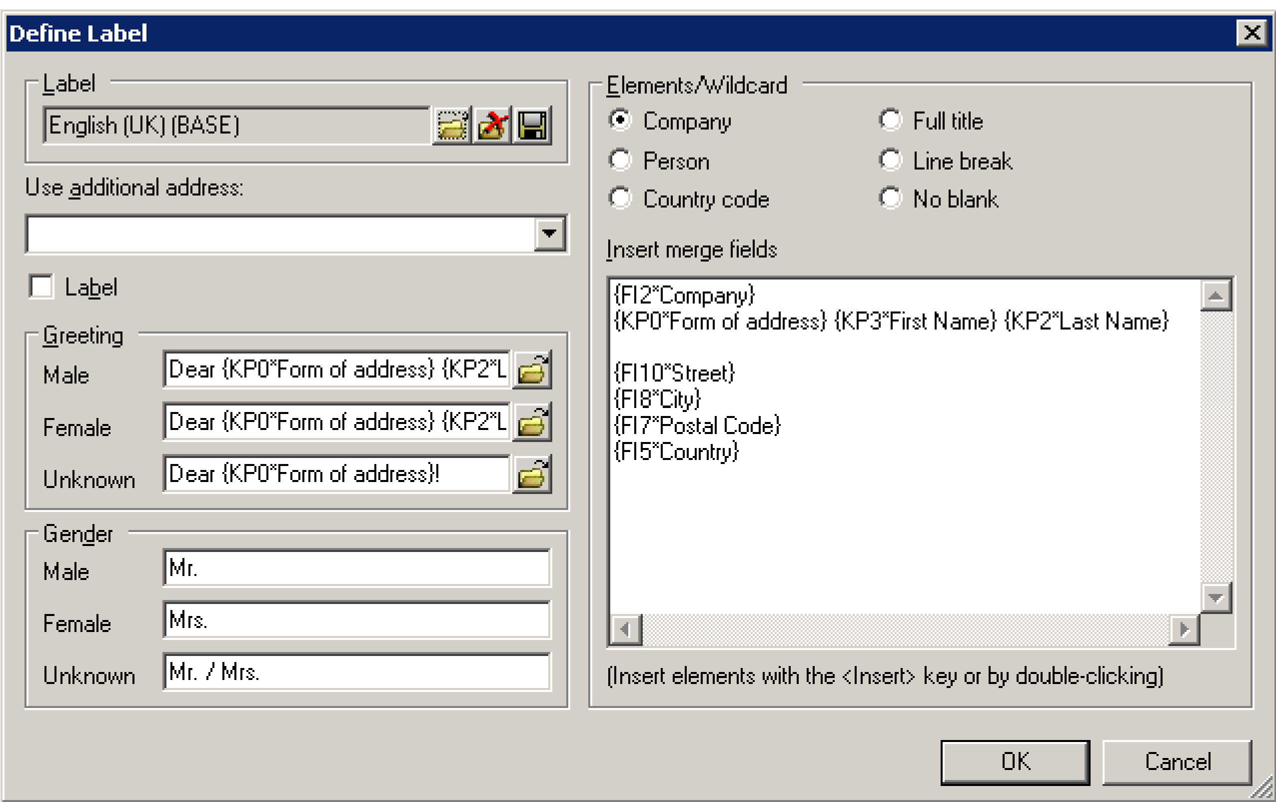


Label Formats

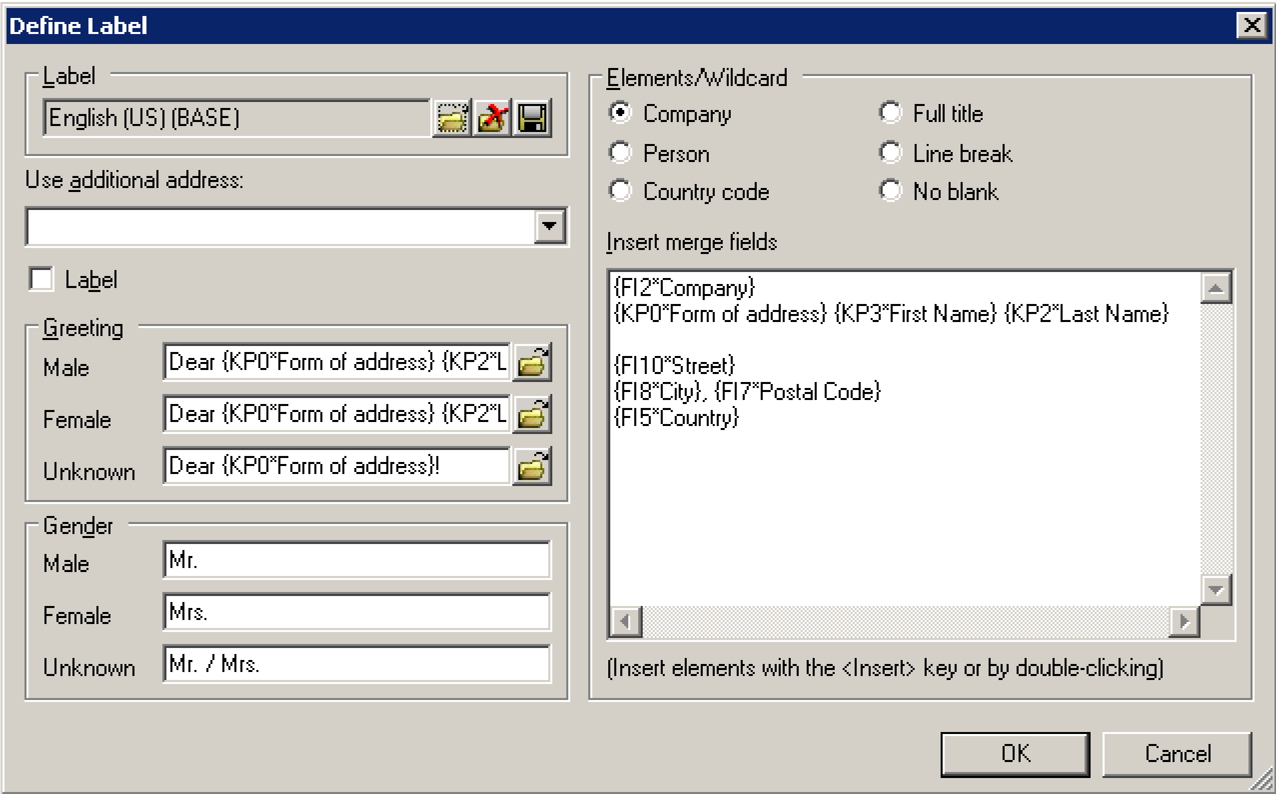
German (Base)



English (UK) (BASE)



English (US) (BASE)



These labels are used based on the label value in the FI or KP record and therefore forms the content of the pre-defined CORE_German_Invitation.doc and CORE_English_Invitation.doc documents.

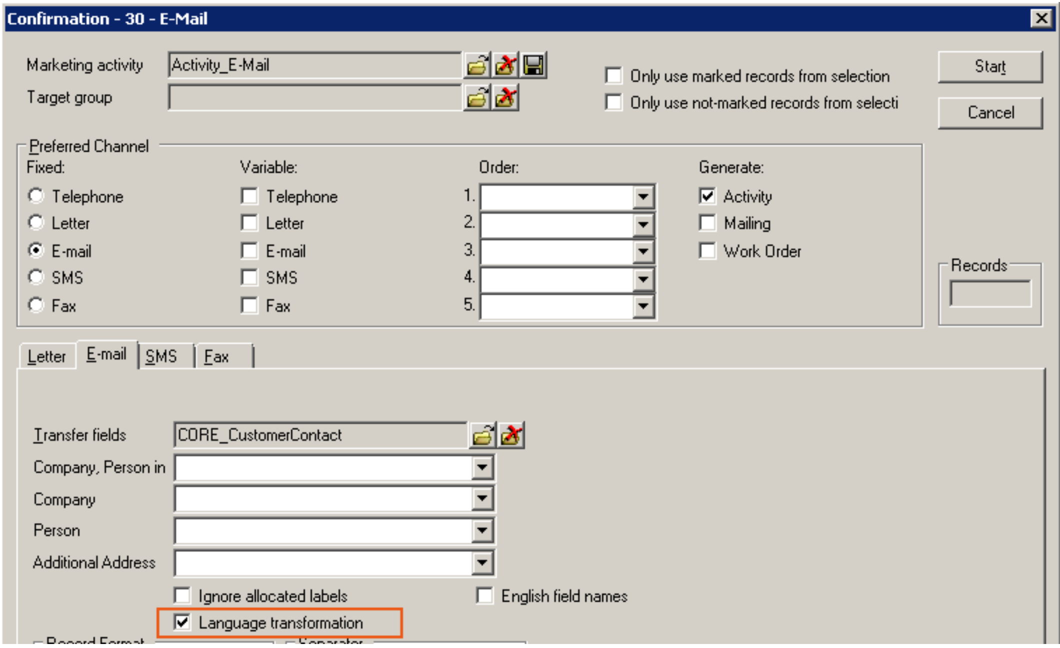
Campaign Templates

The following campaign templates are defined:

- **Documents**

  CORE_ProductInformation_E-Mail.html (StNo: 10000 INo: 186)

  The document is designed to send the e-mail in the recipient’s language. Due to the fact that the “Activity_E-Mail” marketing activity format has set the “Language transformation” flag to true:



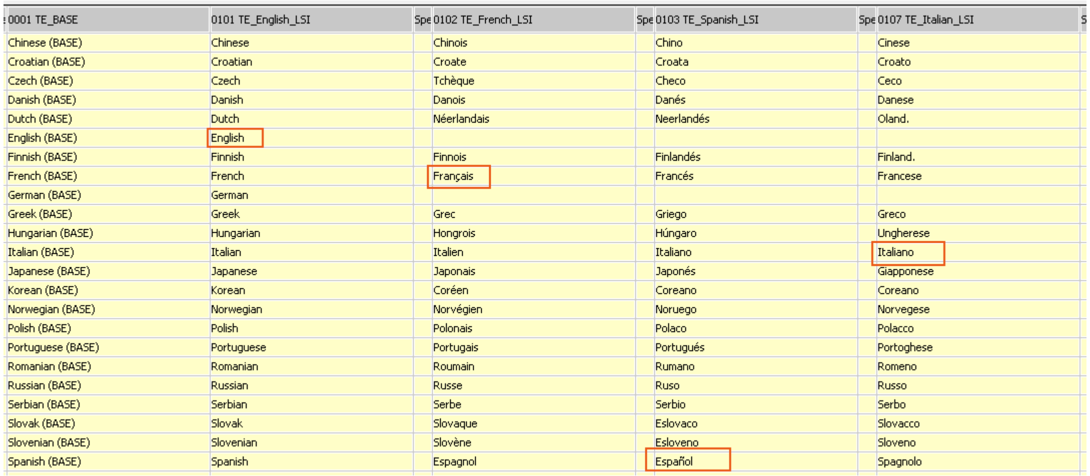
...the value of the "Language" field is transferred according to the document and an IF-ELSE statement delivers the correct text to the e-mail sent.

E-Mail Template	Recipient with "German" Language	Recipient with "English" Language or any other language
<%$IF KPLanguage = 'Deutsch'%> Betreff: Produktinformation <%$ELSE%> Subject: Product Information <%$FI%>		

If you want to add another language you would have to extend the IF-ELSE statement in the following way:

<%$IF KPLanguage = 'Deutsch'%> Betreff: Produktinformation <%$IF KPLanguage = 'Français'%> Object: Validation <%$ELSE%> Subject: Product Information <%$FI%>

The value in the IF-ELSE statement must be in the language of the user's catalog value.



0001 TE_BASE	0101 TE_English_LSI	Spe	0102 TE_French_LSI	Spe	0103 TE_Spanish_LSI	Spe	0107 TE_Italian_LSI
Chinese (BASE)	Chinese		Chinois		Chino		Cinese
Croatian (BASE)	Croatian		Croate		Croata		Croato
Czech (BASE)	Czech		Tchèque		Checo		Ceco
Danish (BASE)	Danish		Danois		Danés		Danese
Dutch (BASE)	Dutch		Néerlandais		Neerlandés		Oland.
English (BASE)	English						
Finnish (BASE)	Finnish		Finnois		Finlandés		Finland.
French (BASE)	French		Français		Francés		Francese
German (BASE)	German						
Greek (BASE)	Greek		Grec		Griego		Greco
Hungarian (BASE)	Hungarian		Hongrois		Húngaro		Ungherese
Italian (BASE)	Italian		Italien		Italiano		Italiano
Japanese (BASE)	Japanese		Japonais		Japonés		Giapponese
Korean (BASE)	Korean		Coréen		Coreano		Coreano
Norwegian (BASE)	Norwegian		Norvégien		Noruego		Norvegese
Polish (BASE)	Polish		Polonais		Polaco		Polacco
Portuguese (BASE)	Portuguese		Portugais		Portugués		Portoghese
Romanian (BASE)	Romanian		Roumain		Rumano		Romeno
Russian (BASE)	Russian		Russe		Ruso		Russo
Serbian (BASE)	Serbian		Serbe		Serbio		Serbo
Slovak (BASE)	Slovak		Slovaque		Eslovaco		Slovacco
Slovenian (BASE)	Slovenian		Slovène		Esloveno		Sloveno
Spanish (BASE)	Spanish		Espagnol		Español		Spagnolo

- **Default Values**

  The following default value formats are defined

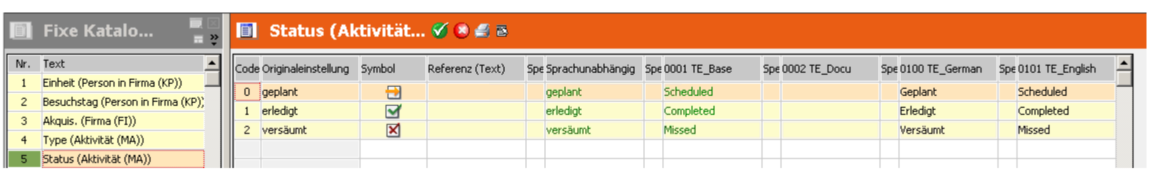
Format

With Conditions:Format

Station	Type	User	Name	Created on	Version (cockpit package)	Name (cockpit package)
10000	Info Area Default Values		Besuch Beratung	15.01.2013	8.0.3.29	TE_BASE
10000	Info Area Default Values		Brief Einladung	15.01.2013	8.0.3.29	TE_BASE
10000	Info Area Default Values		E-Mail Bestätigung	15.01.2013	8.0.3.29	TE_BASE
10000	Info Area Default Values		E-Mail Confirmation	15.01.2013	8.0.3.29	TE_BASE
10000	Info Area Default Values		E-Mail Product Information	15.01.2013	8.0.3.29	TE_BASE
10000	Info Area Default Values		E-Mail Produktinformation	15.01.2013	8.0.3.29	TE_BASE
10000	Info Area Default Values		Event Event	15.01.2013	8.0.3.29	TE_BASE
10000	Info Area Default Values		Letter Invitation	15.01.2013	8.0.3.29	TE_BASE
10000	Info Area Default Values		Telefone Nachverfolgung	15.01.2013	8.0.3.29	TE_BASE
10000	Info Area Default Values		Telephone Follow-Up	15.01.2013	8.0.3.29	TE_BASE
10000	Info Area Default Values		Veranstaltung Veranstaltung	15.01.2013	8.0.3.29	TE_BASE
10000	Info Area Default Values		Visit Consultation	15.01.2013	8.0.3.29	TE_BASE

- **Catalogs**
  - **Fixed Catalogs**

    5 Status (Aktivität (MA))



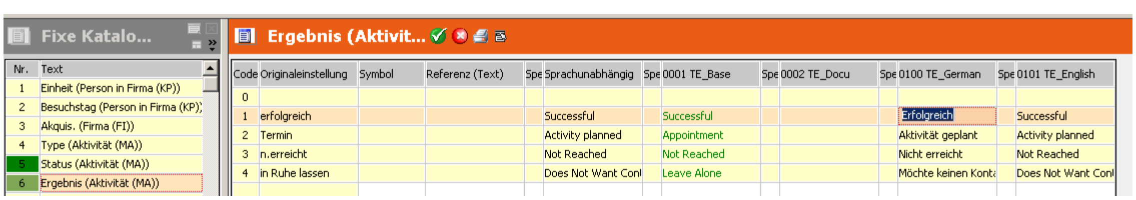
Fixe Katalo...

Nr.	Text
1	Einheit (Person in Firma (KP))
2	Besuchstag (Person in Firma (KP))
3	Akquis. (Firma (FI))
4	Type (Aktivität (MA))
5	Status (Aktivität (MA))

Status (Aktivität...

Code	Originaleinstellung	Symbol	Referenz (Text)	Spe	Sprachunabhängig	Spe	0001 TE_Base	Spe	0002 TE_Docu	Spe	0100 TE_German	Spe	0101 TE_English
0	geplant				geplant		Scheduled				Geplant		Scheduled
1	erledigt				erledigt		Completed				Erledigt		Completed
2	versäumt				versäumt		Missed				Versäumt		Missed

    6 Ergebnis (Aktivität (MA))



Fixe Katalo...

Nr.	Text
1	Einheit (Person in Firma (KP))
2	Besuchstag (Person in Firma (KP))
3	Akquis. (Firma (FI))
4	Type (Aktivität (MA))
5	Status (Aktivität (MA))
6	Ergebnis (Aktivität (MA))

Ergebnis (Aktivit...

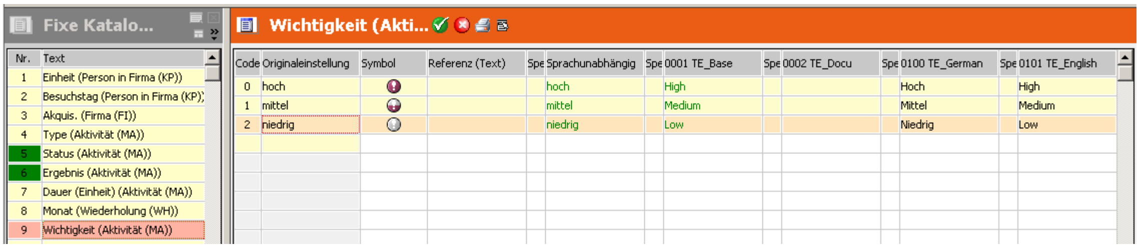
Code	Originaleinstellung	Symbol	Referenz (Text)	Spe	Sprachunabhängig	Spe	0001 TE_Base	Spe	0002 TE_Docu	Spe	0100 TE_German	Spe	0101 TE_English
0													
1	erfolgreich				Successful		Successful				Erfolgreich		Successful
2	Termin				Activity planned		Appointment				Aktivität geplant		Activity planned
3	n.erreicht				Not Reached		Not Reached				Nicht erreicht		Not Reached
4	in Ruhe lassen				Does Not Want Con|		Leave Alone				Möchte keinen Konta		Does Not Want Con|

Code 4:

TE_German: Möchte keinen Kontakt mehr

TE_English: Does Not Want Contact Any More

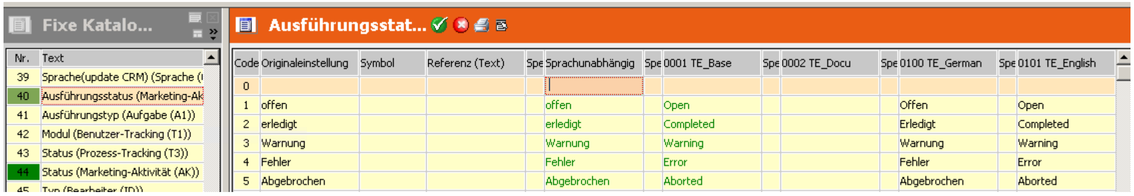
9 Wichtigkeit (Aktivitat (MA))



Nr.	Text
1	Einheit (Person in Firma (KP))
2	Besuchstag (Person in Firma (KP))
3	Akquis. (Firma (FI))
4	Type (Aktivität (MA))
5	Status (Aktivität (MA))
6	Ergebnis (Aktivität (MA))
7	Dauer (Einheit) (Aktivität (MA))
8	Monat (Wiederholung (WH))
9	Wichtigkeit (Aktivität (MA))

Code	Originaleinstellung	Symbol	Referenz (Text)	Spe	Sprachunabhängig	Spe	0001 TE_Base	Spe	0002 TE_Docu	Spe	0100 TE_German	Spe	0101 TE_English
0	hoch				hoch		High				Hoch		High
1	mittel				mittel		Medium				Mittel		Medium
2	niedrig				niedrig		Low				Niedrig		Low

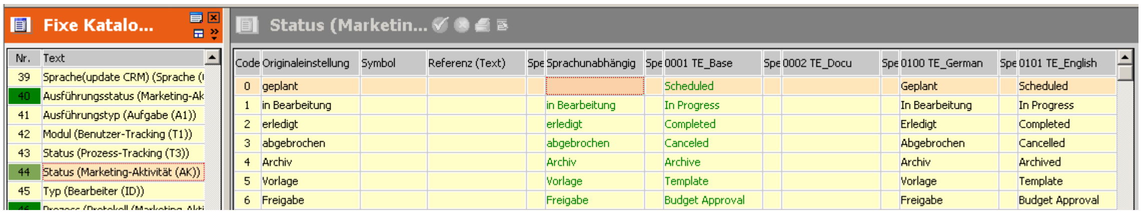
40 Ausführungsstatus (Marketing-Aktivität (AK))



Nr.	Text
39	Sprache(update CRM) (Sprache (
40	Ausführungsstatus (Marketing-Ak
41	Ausführungstyp (Aufgabe (A1))
42	Modul (Benutzer-Tracking (T1))
43	Status (Prozess-Tracking (T3))
44	Status (Marketing-Aktivität (AK))

Code	Originaleinstellung	Symbol	Referenz (Text)	Spe	Sprachunabhängig	Spe	0001 TE_Base	Spe	0002 TE_Docu	Spe	0100 TE_German	Spe	0101 TE_English
0													
1	offen				offen		Open				Offen		Open
2	erledigt				erledigt		Completed				Erledigt		Completed
3	Warnung				Warnung		Warning				Warnung		Warning
4	Fehler				Fehler		Error				Fehler		Error
5	Abgebrochen				Abgebrochen		Aborted				Abgebrochen		Aborted

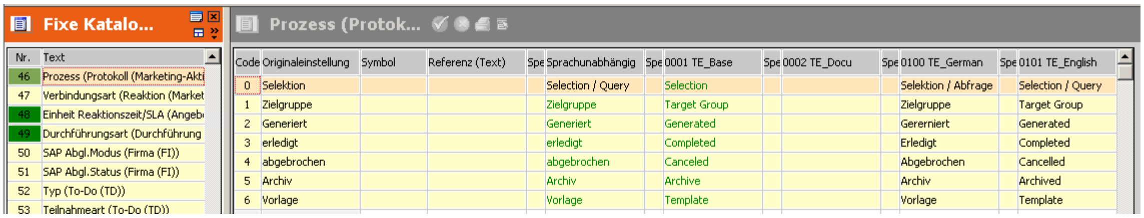
44 Status (Marketing-Aktivität (AK))



Nr.	Text
39	Sprache(update CRM) (Sprache (
40	Ausführungsstatus (Marketing-Ak
41	Ausführungstyp (Aufgabe (A1))
42	Modul (Benutzer-Tracking (T1))
43	Status (Prozess-Tracking (T3))
44	Status (Marketing-Aktivität (AK))
45	Typ (Bearbeiter (ID))

Code	Originaleinstellung	Symbol	Referenz (Text)	Spe	Sprachunabhängig	Spe	0001 TE_Base	Spe	0002 TE_Docu	Spe	0100 TE_German	Spe	0101 TE_English
0	geplant						Scheduled				Geplant		Scheduled
1	in Bearbeitung				in Bearbeitung		In Progress				In Bearbeitung		In Progress
2	erledigt				erledigt		Completed				Erledigt		Completed
3	abgebrochen				abgebrochen		Canceled				Abgebrochen		Cancelled
4	Archiv				Archiv		Archive				Archiv		Archived
5	Vorlage				Vorlage		Template				Vorlage		Template
6	Freigabe				Freigabe		Budget Approval				Freigabe		Budget Approval

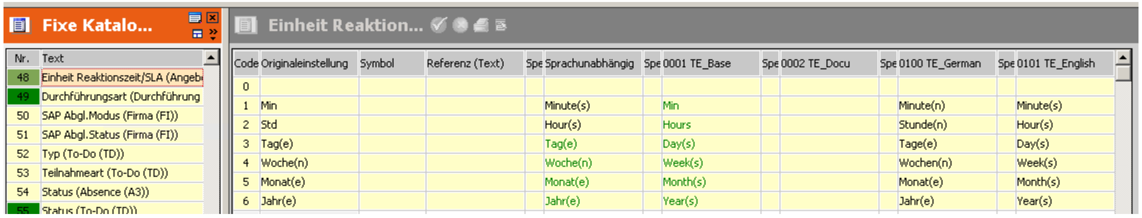
46 Prozess (Protokoll (Marketing-Aktivität) (AO))



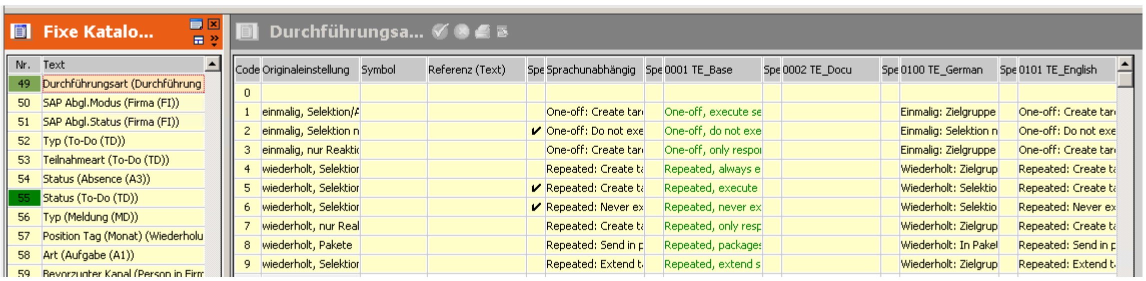
Nr.	Text
46	Prozess (Protokoll (Marketing-Akti
47	Verbindungsart (Reaktion (Market
48	Einheit Reaktionszeit/SLA (Angeb
49	Durchführungsart (Durchführung
50	SAP Abgl.Modus (Firma (FI))
51	SAP Abgl.Status (Firma (FI))
52	Typ (To-Do (TD))
53	Teilnahmeart (To-Do (TD))

Code	Originaleinstellung	Symbol	Referenz (Text)	Spe	Sprachunabhängig	Spe	0001 TE_Base	Spe	0002 TE_Docu	Spe	0100 TE_German	Spe	0101 TE_English
0	Selektion				Selection / Query		Selection				Selektion / Abfrage		Selection / Query
1	Zielgruppe				Zielgruppe		Target Group				Zielgruppe		Target Group
2	Generiert				Generiert		Generated				Gererniert		Generated
3	erledigt				erledigt		Completed				Erledigt		Completed
4	abgebrochen				abgebrochen		Canceled				Abgebrochen		Cancelled
5	Archiv				Archiv		Archive				Archiv		Archived
6	Vorlage				Vorlage		Template				Vorlage		Template

Einheit Reaktionszeit/SLA (Angebot (PR))



Durchführungsart (Durchführung (Marketing-Aktivität) (AD))



Note: The grey text should be locked, i.e. not visible.

TE_German	Sprachunabhängig / TE-English
Einmalig: Zielgruppe durch Abfrage erstellen	One-off: Create target group based on query
Einmalig: Selektion nicht durchführen	One-off: Do not execute selection
Einmalig: Zielgruppe aufgrund von Reaktion/ Neuzugang erstellen	One-off: Create target group based on response / new entry
Wiederholt: Zielgruppe jedes Mal neu durch Abfrage erstellen	Repeated: Create target group based on query every time new
Wiederholt: Selektion einmal durchführen	Repeated: Create target group based on selection once
Wiederholt: Selektion nie durchführen	Repeated: Never execute selection
Wiederholt: Zielgruppe aufgrund von Reaktion / Neuzugang erstellen	Repeated: Create target group based on responses
Wiederholt: In Paketen durchführen	Repeated: Send in packets
Wiederholt: Zielgruppe jedes Mal durch Abfrageergebnisse erweitern	Repeated: Extend target group based on query results

55 Status (To-Do (TD))

Fixe Katalo...

Nr.	Text
55	Status (To-Do (TD))
56	Typ (Meldung (MD))
57	Position Tag (Monat) (Wiederholu
58	Art (Aufgabe (A1))
59	Bevorzugter Kanal (Person in Firr
60	Basis (Durchführung (Marketing-A
61	Typ (Abfrageergebnis (Q1))

Status (To-Do (T...

Code	Originaleinstellung	Symbol	Referenz (Text)	Spe	Sprachunabhängig	Spe	0001 TE_Base	Spe	0002 TE_Docu	Spe	0100 TE_German	Spe	0101 TE_English
0	offen				offen		Open				Offen		Open
1	anzeigen				anzeigen		Show				Anzeigen		Show
2	erledigt				erledigt		Completed				Erledigt		Completed
3	versäumt				versäumt		Missed				Versäumt		Missed
4	in Bearbeitung				in Bearbeitung		In Progress				In Bearbeitung		In Progress
5	Abgebrochen				Cancelled		Aborted				Abgebrochen		Cancelled

60 Basis (Durchführung (Marketing-Aktivität) (AD)

Fixe Katalo...

Nr.	Text
60	Basis (Durchführung (Marketing-A
61	Typ (Abfrageergebnis (Q1))
62	Typ (Konfiguration (MC))
63	E-Mail senden als (Durchführung (

Basis (Durchführ...

Code	Originaleinstellung	Symbol	Referenz (Text)	Spe	Sprachunabhängig	Spe	0001 TE_Base	Spe	0002 TE_Docu	Spe	0100 TE_German	Spe	0101 TE_English
0	Selektion			✔	Selektion		Selection				Selektion		Selection
1	Globale Abfrage				Globale Abfrage		Global query				Globale Abfrage		Global Query
2	Private Abfrage				Private Abfrage		Private query				Private Abfrage		Private Query

- **Variable Kataloge**

372 Kamp.-Typ. (Marketing-Aktivität)

Katalog

Kamp.-Typ (Marketing-Aktivität) Anz. 4

Mandant	Ext. Schlüssel	Spe	0001 TE_Base	Ext. Schlüssel	Spe	0100 TE_German	Ext. Schlüssel	Spe	0101 TE_English
9000	10000_372_1		Event			Veranstaltung			Event
9000	10000_372_3		Newsletter			Newsletter			Newsletter
9000	10000_372_2		Promotion			Promotion			Promotion
9000	10000_372_4		Quick Campaign			Schnellkampagne			Quick Campaign

20 Marketing-Aktivität

Katalog

Marketing-Aktivität (Marketing- Anz. 11

Mandant	Ext. Schlüssel	Spe	0001 TE_Base	Ext. Schlüssel	Spe	0100 TE_German	Ext. Schlüssel	Spe	0101 TE_English
9000	10000_20_4		Christmas Card			Weihnachtskarte			Christmas Card
9000	10000_20_6		Confirmation			Bestätigung			Confirmation
9000	10000_20_7		Consultation			Beratung			Consultation
9000	10000_20_10		Event			Veranstaltung			Event
9000	10000_20_8		Follow-up			Nachverfolgung			Follow-up
9000	10000_20_9		Invitation			Einladung			Invitation
9000	10000_20_11		Newsletter			Newsletter			Newsletter
9000	10000_20_1		Offer			Angebot			Offer
9000	10000_20_2		Product Information			Produktinformation			Product Information
9000	10000_20_5		Quick Campaign			Schnellkampagne			Quick Campaign
9000	10000_20_3		Survey			Umfrage			Survey

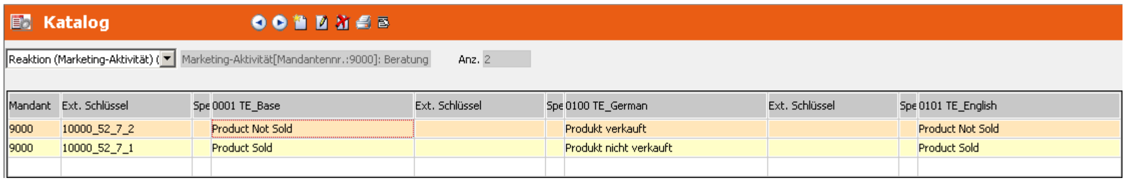
161 Variante (Marketing-Akt.)

Katalog

Variante (Marketing-Akt.) (Marl Anz. 7

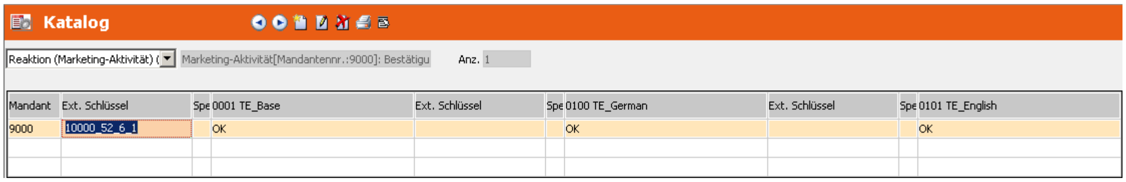
Mandant	Ext. Schlüssel	Spe	0001 TE_Base	Ext. Schlüssel	Spe	0100 TE_German	Ext. Schlüssel	Spe	0101 TE_English
9000	10000_161_2		E-Mail			E-Mail			E-Mail
9000	10000_161_6		Fax			Fax			Fax
9000	10000_161_1		Letter			Brief			Letter
9000	10000_161_3		Personal			Persönlich			Personal
9000	10000_161_7		Preferred Channel			Bevorzugter Kanal			Preferred Channel
9000	10000_161_5		SMS			SMS			SMS
9000	10000_161_4		Telephone			Telefon			Telephone

52 Reaktion (Marketing-Aktivität)


Katalog

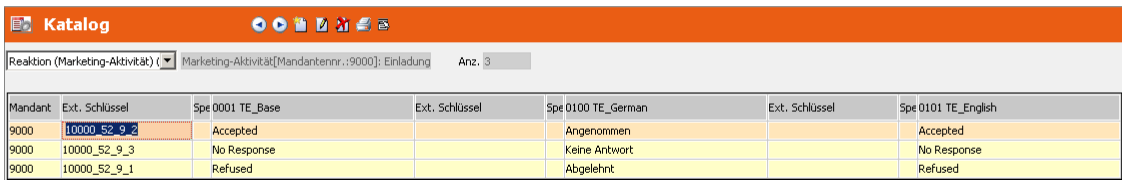
Reaktion (Marketing-Aktivität) (Marketing-Aktivität[Mandantennr.:9000]: Beratung Anz. 2

Mandant	Ext. Schlüssel	Spe	0001 TE_Base	Ext. Schlüssel	Spe	0100 TE_German	Ext. Schlüssel	Spe	0101 TE_English
9000	10000_52_7_2		Product Not Sold			Produkt verkauft			Product Not Sold
9000	10000_52_7_1		Product Sold			Produkt nicht verkauft			Product Sold


Katalog

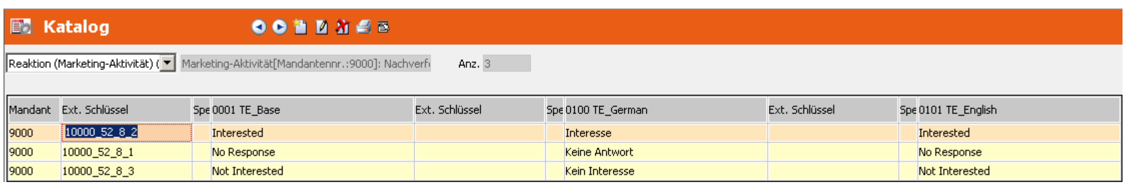
Reaktion (Marketing-Aktivität) (Marketing-Aktivität[Mandantennr.:9000]: Bestätigu Anz. 1

Mandant	Ext. Schlüssel	Spe	0001 TE_Base	Ext. Schlüssel	Spe	0100 TE_German	Ext. Schlüssel	Spe	0101 TE_English
9000	10000_52_6_1		OK			OK			OK


Katalog

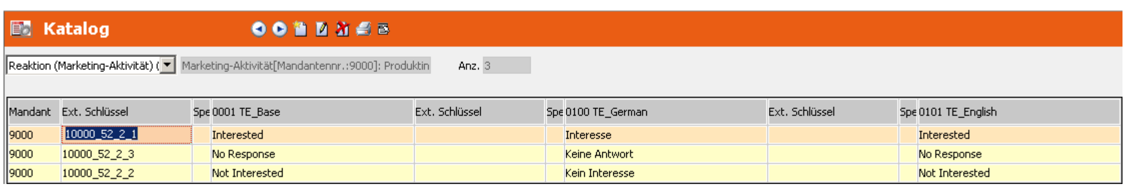
Reaktion (Marketing-Aktivität) (Marketing-Aktivität[Mandantennr.:9000]: Einladung Anz. 3

Mandant	Ext. Schlüssel	Spe	0001 TE_Base	Ext. Schlüssel	Spe	0100 TE_German	Ext. Schlüssel	Spe	0101 TE_English
9000	10000_52_9_2		Accepted			Angenommen			Accepted
9000	10000_52_9_3		No Response			Keine Antwort			No Response
9000	10000_52_9_1		Refused			Abgelehnt			Refused


Katalog

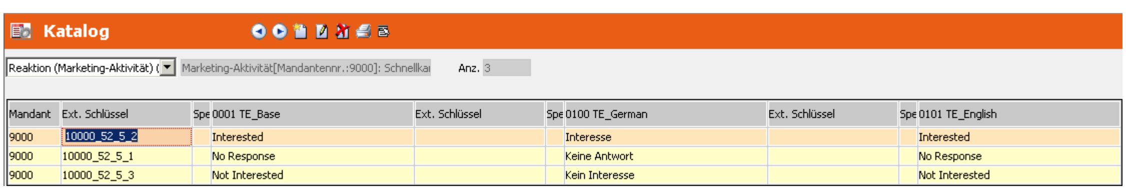
Reaktion (Marketing-Aktivität) (Marketing-Aktivität[Mandantennr.:9000]: Nachverf Anz. 3

Mandant	Ext. Schlüssel	Spe	0001 TE_Base	Ext. Schlüssel	Spe	0100 TE_German	Ext. Schlüssel	Spe	0101 TE_English
9000	10000_52_8_2		Interested			Interesse			Interested
9000	10000_52_8_1		No Response			Keine Antwort			No Response
9000	10000_52_8_3		Not Interested			Kein Interesse			Not Interested


Katalog

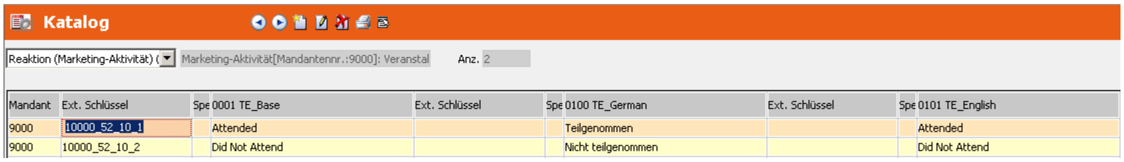
Reaktion (Marketing-Aktivität) (Marketing-Aktivität[Mandantennr.:9000]: Produktin Anz. 3

Mandant	Ext. Schlüssel	Spe	0001 TE_Base	Ext. Schlüssel	Spe	0100 TE_German	Ext. Schlüssel	Spe	0101 TE_English
9000	10000_52_2_1		Interested			Interesse			Interested
9000	10000_52_2_3		No Response			Keine Antwort			No Response
9000	10000_52_2_2		Not Interested			Kein Interesse			Not Interested


Katalog

Reaktion (Marketing-Aktivität) (Marketing-Aktivität[Mandantennr.:9000]: Schnellka Anz. 3

Mandant	Ext. Schlüssel	Spe	0001 TE_Base	Ext. Schlüssel	Spe	0100 TE_German	Ext. Schlüssel	Spe	0101 TE_English
9000	10000_52_5_2		Interested			Interesse			Interested
9000	10000_52_5_1		No Response			Keine Antwort			No Response
9000	10000_52_5_3		Not Interested			Kein Interesse			Not Interested



Designer Configuration

Learn about the basic designer configuration for campaign management.

Standard elements for CM, AK, AD, AI, AN, AO, AX, AG, V1, V2, V3, V4, V5, V6.

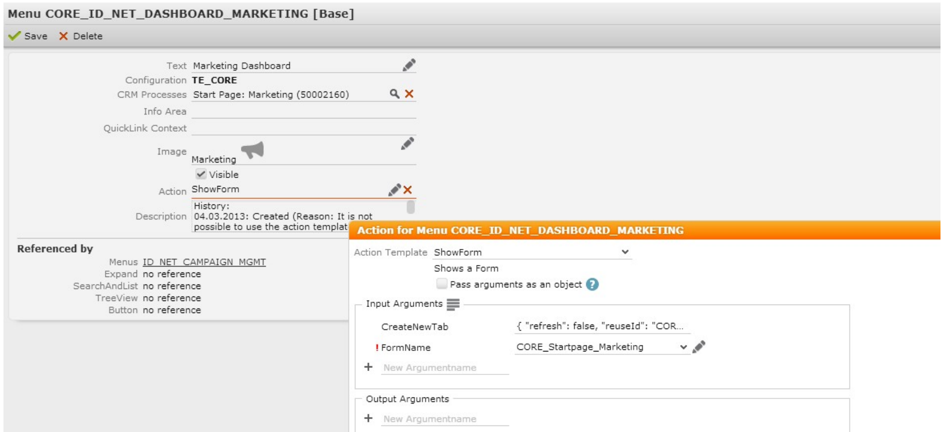
The standard elements (Search&List, Expand, Table Caption, Field Group and Header) were defined in the BASE configuration in order to provide a unified layout of fields, tabs etc. in all templates. Just in a few cases (e.g. AD mask in LSI) the elements were changed in the industry-specific template itself.

- **Standard elements**

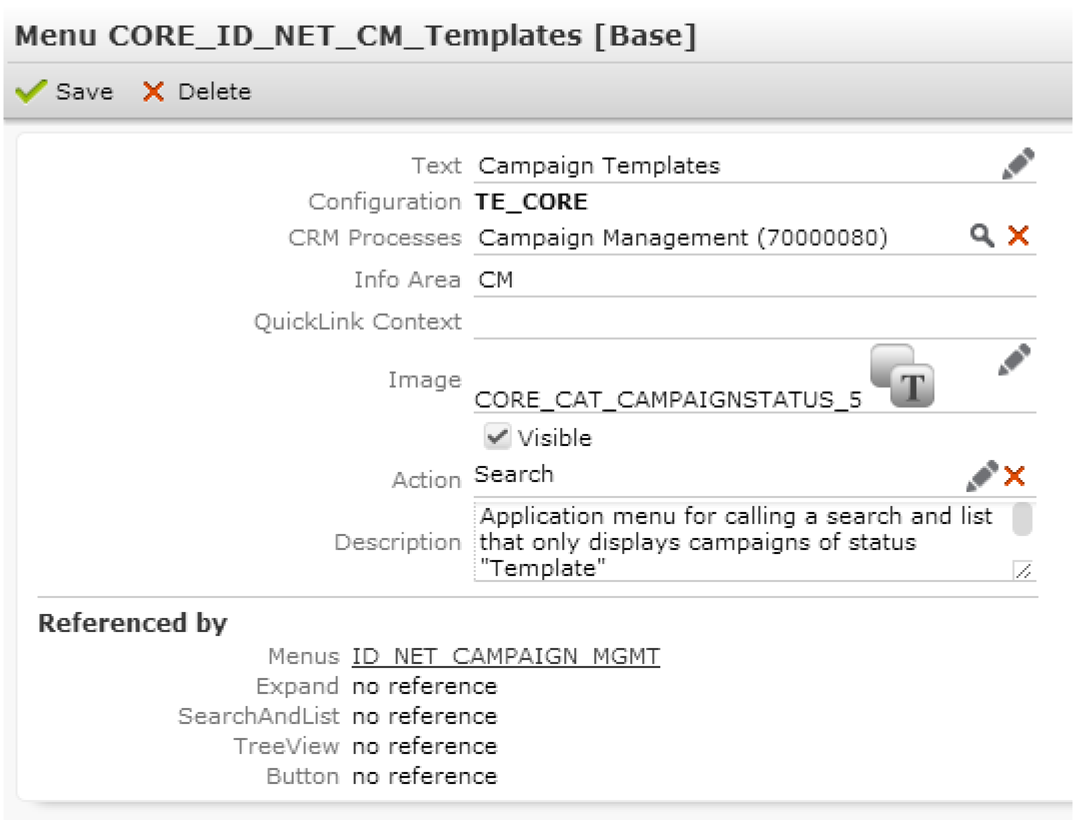
  These standard elements from UPDATE_DEFAULT were defined in the BASE configuration in order to provide a unified layout / behavior in all templates.

  ID_NET_CAMPAIGN_MGMT, AK-CM, AKNew, ID_NET_ACTIVITY, CMTree, SelectCampaignReturn,SelectTemplateCampaign, CopyCampaign, M_Activity, M_ActivityExecution, ID_NET_NEWCAMPAIGN, MarketingActiviyExecution, ID_NET_CAMPAIGNS, ID_NET_ACTIVITY_NEW, ID_NET_TOPIC, ID_NET_STARTPAGE_MARKETING, M_EventParticipant, M_AgendaItem, AGSublistNew, New Activity, New ActivityToCampaign, SelectTemplateMarketingActivity->CopyMarketingActivity, AGSublistNew, NewCampaign, M_Expand_Delete, A_DefaultValuesForWorkorder, A_DefaultValuesForMailing

- **CORE_ID_NET_DASHBOARD_MARKETING Menu**

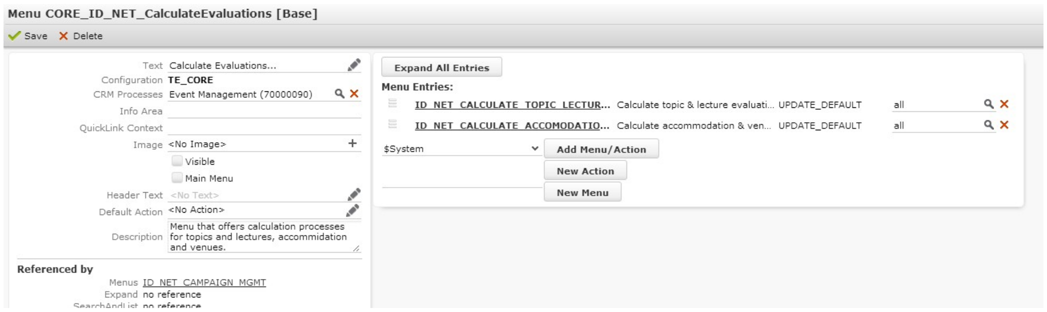


CreateNewTab: { "refresh": false, "reuseId": "CORE_ID_NET_DASHBOARD_MARKETING" }



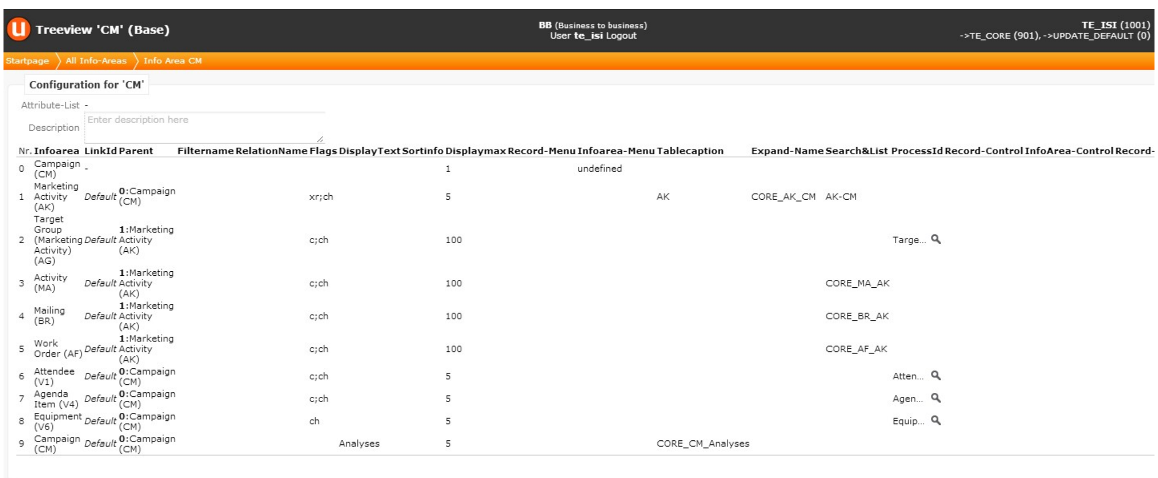
- **CORE_ID_NET_CalculateEvaluations Menu**

  Displays the standard elements for calculating lecture subject, speaker evaluation, accommodation and venue evaluation. The menu is set to invisible as this functionality is not available in update.CRM SP0.



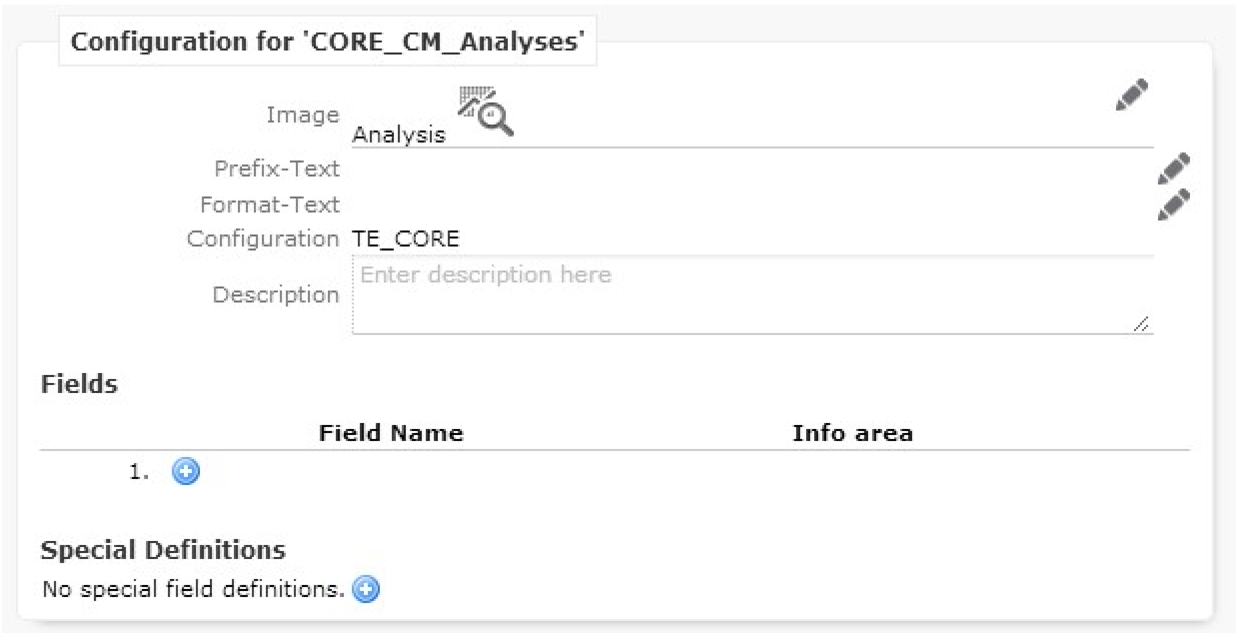
- **CM Tree View**

  The tree view is the main view for the campaign.



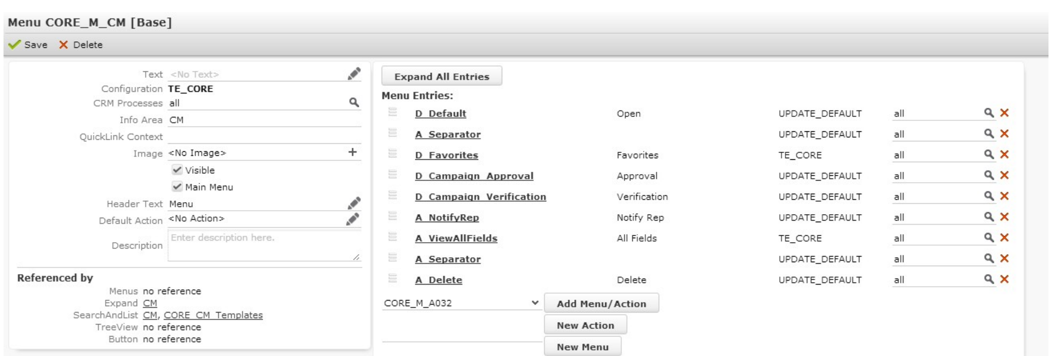
- **CORE_CM_Analyses Table Caption**

  Used in the CM tree view to name the node that displays the analysis in the tree view.



- **CORE_M_CM Menu**

  Context menu of the CM info area



- **CORE_AN_CM Header Group**

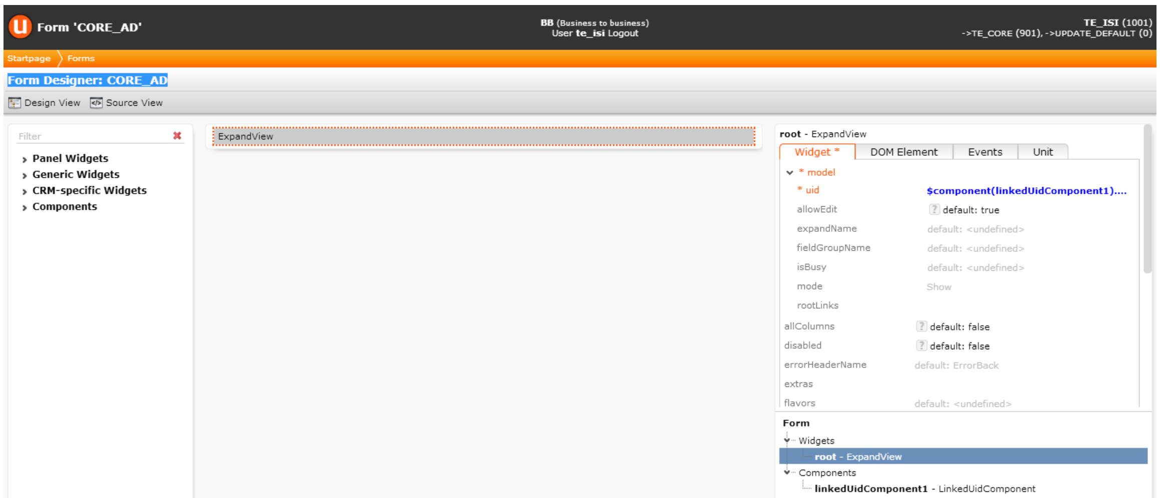
  Used in the ExpandChildren header of the CM header group to offer NO new button for Response (AN) records in the sub-list of the Campaign (CM) mask.

- **CORE_AK_CM Field Group**

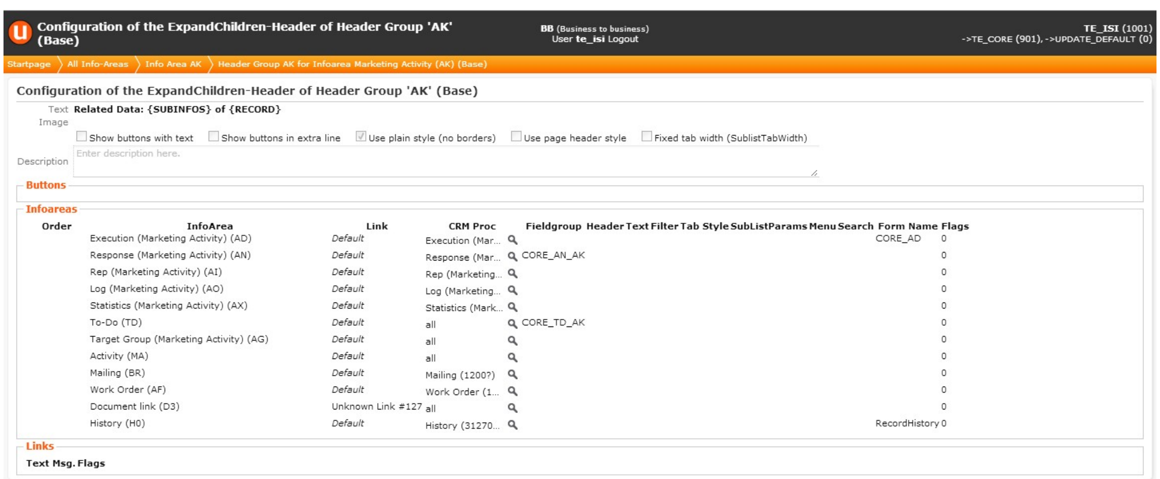
  Defined elements: List, Search and MiniDetails. Used in the ExpandChildren header of the CM header group in order to display the sub-list of marketing activities (AK) records below a campaign.

- **CORE_AD Form**

  Used to display the AD record below the AK mask – used in the AK ExpandChildren header and AK-CM ExpandChildren header



- **AK ExpandChildren Header**



- **CORE_MA_AK Search&List and Field Group**

  Defined elements: List and Search. Used in the CM tree view for the Activity node (MA).

- **CORE_MA_FI Search&List and Field Group**

  Defined elements: List and Search. Used in the FI tree view for the Activity node (MA).

- **CORE_MA_KP Search&List and Field Group**

  Defined elements: List and Search. Used in the FI tree view for the Activity node (MA) under the KP record node.

- **CORE_BR_AK Search&List and Field Group**

  Defined elements: List and Search. Used in the CM tree view for the Mailing node (BR).

- **CORE_BR_FI Search&List and Field Group**

  Defined elements: List and Search. Used in the FI tree view for the Mailing node (BR).

- **CORE_BR_KP Search&List and Field Group**

  Defined elements: List and Search. Used in the FI tree view for the Mailing node (BR) under the KP record node.

- **CORE_AF_AK Search&List and Field Group**

  Defined elements: List and Search. Used in the CM tree view for the Work Order node (AF).

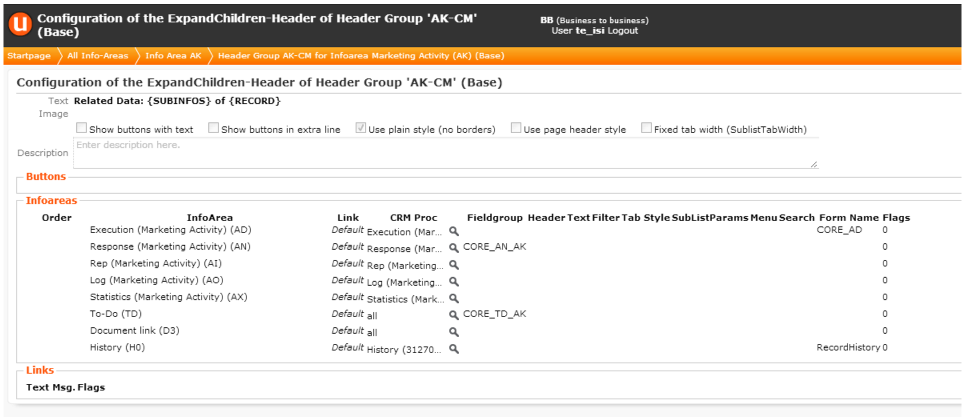
- **CORE_AF_FI Search&List and Field Group**

  Defined elements: List and Search. Used in the FI tree view for the Work Order node (AF).

- **CORE_AF_KP Search&List and Field Group**

  Defined elements: List and Search. Used in the FI tree view for the Work Order node (BR) under the KP record node.

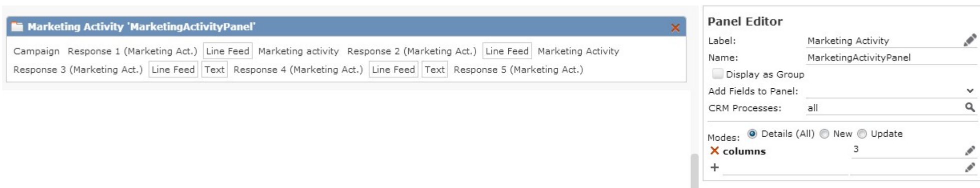
- **AK-CM ExpandChildren Header**

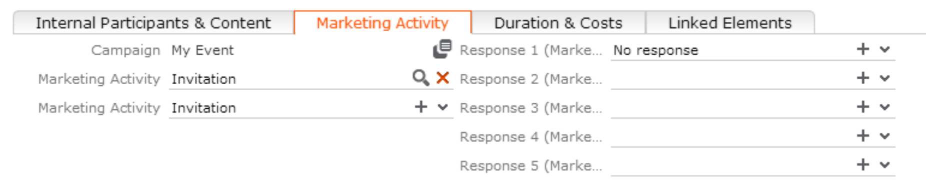


- **Field Groups**

  These following field groups have a Details control defined that contains the following tab:

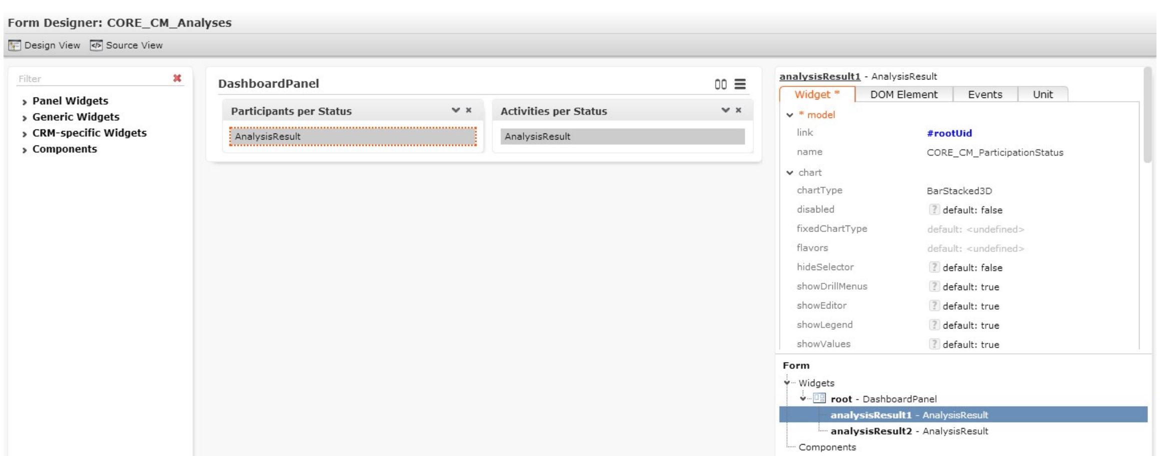
  TE_MA_Email, TE_MA_EmailSent, TE_MA_Fax, TE_MA_Info, TE_MA_Internet, TE_MA_Letter, TE_MA_Telephone, TE_MA_Telephone_Completed, TE_MA_Visit, TE_MA_Visit_Completed Field Groups



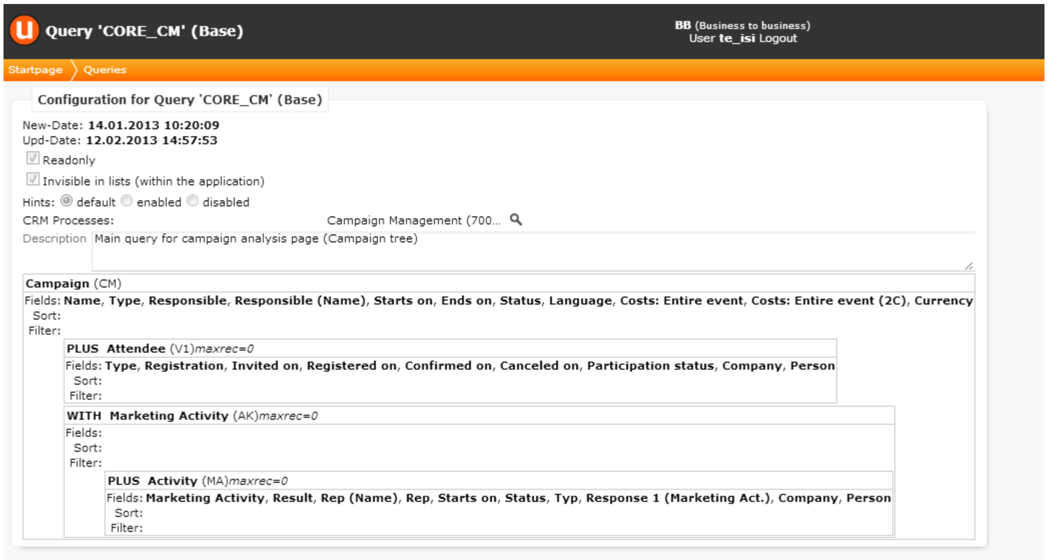


Form **CORE_CM_Analyses**

Used to display two analyses directly in the CM tree view.



- **CORE_CM Query**

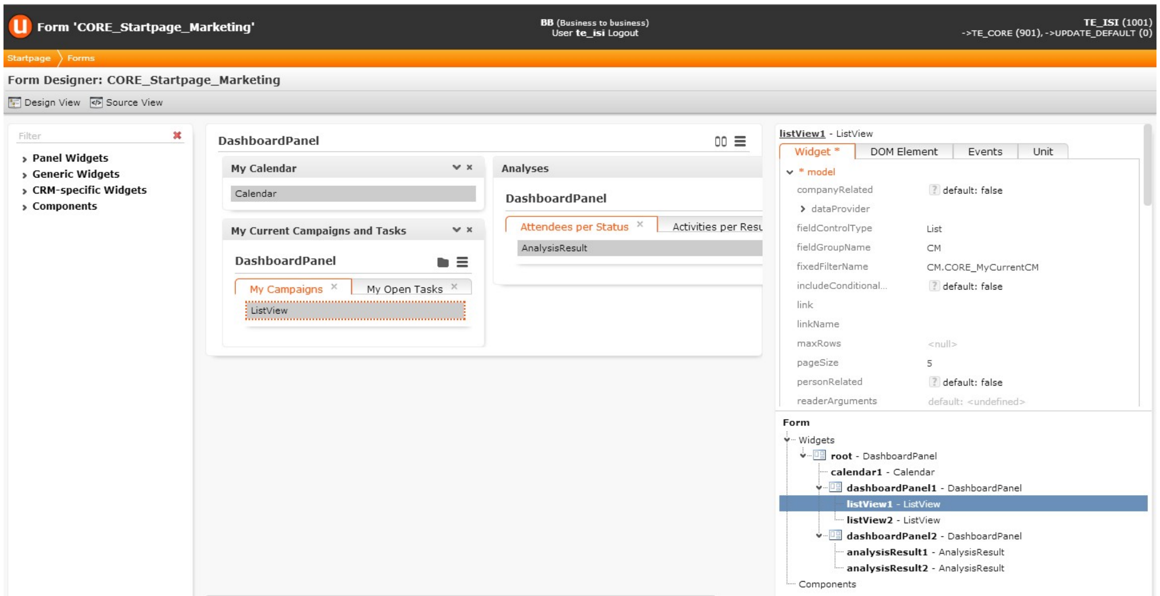


- **CORE_CM_ParticipationStatus Analysis**

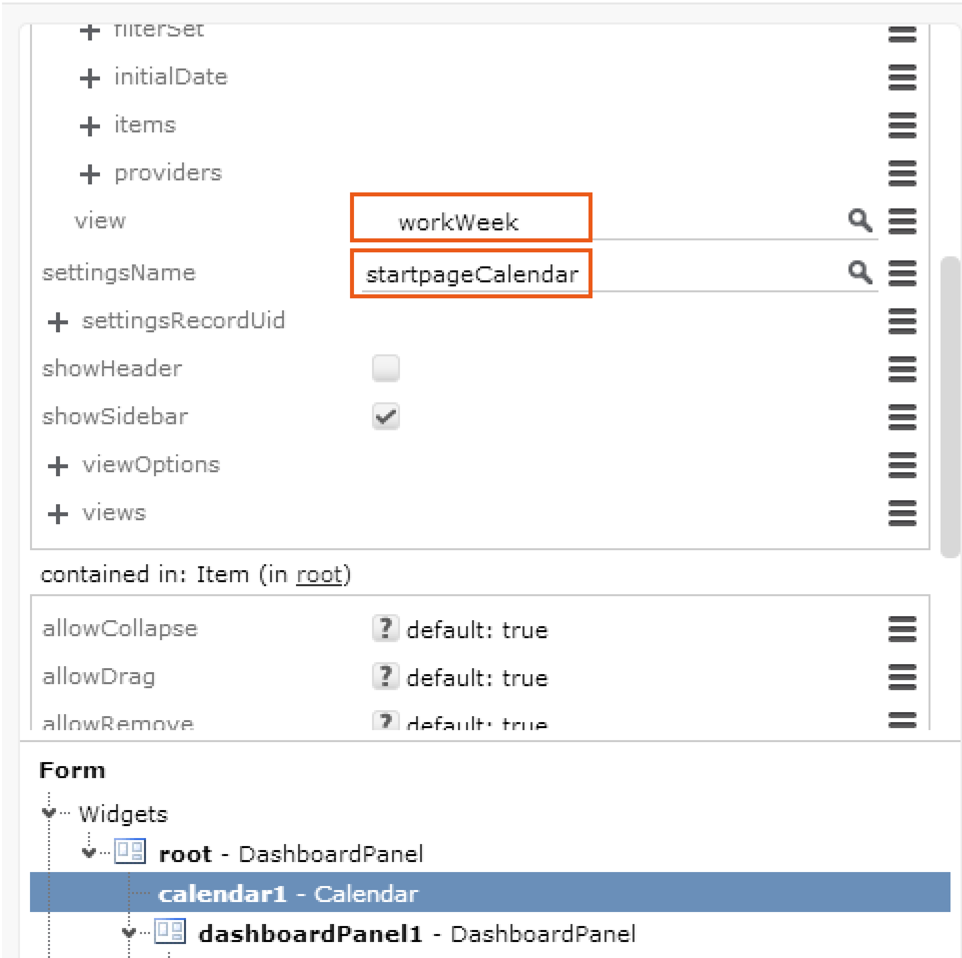
  Based on the CORE_CM query displayed in the CORE_CM_Analyses form, which is shown in the CM tree. Displays all attendees of this event (V1 records) based on their participation status.

- **CORE_CM_Activities Analysis**

  Based on the CORE_CM query displayed in the CORE_CM_Analyses form, which is shown in the CM tree.



  These settings prevent the start page calendar to change if the user changes his/her settings in the “default calendar”:


filterSet
initialDate
items
providers
view
workWeek
settingsName
startpageCalendar
settingsRecordUid
showHeader
showSidebar
viewOptions
views
contained in: Item (in root)
allowCollapse
default: true
allowDrag
default: true
allowRemove
default: true
Form
Widgets
root - DashboardPanel
calendar1 - Calendar
dashboardPanel1 - DashboardPanel

- **CORE_CM_ParticipationStatus_All Analysis**

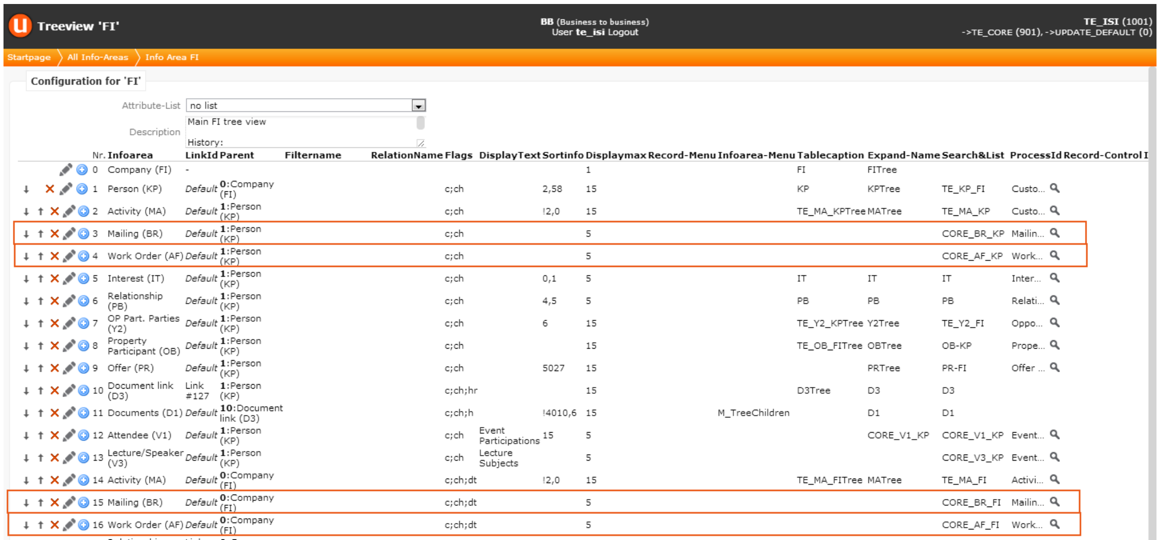
  Based on the CORE_CM query –displayed in the CORE_Startpage_Marketing Form. Displays all attendees of all events (V1 records) based on their participation status. Assigned to the Campaign Management CRM process.

- **CORE_CM_Activities_Results Analysis**

  Based on the CORE_CM query displayed in the CORE_Startpage_Marketing Form. Displays all activities of all events (MA records) based on their result. Assigned to the Campaign Management CRM process.

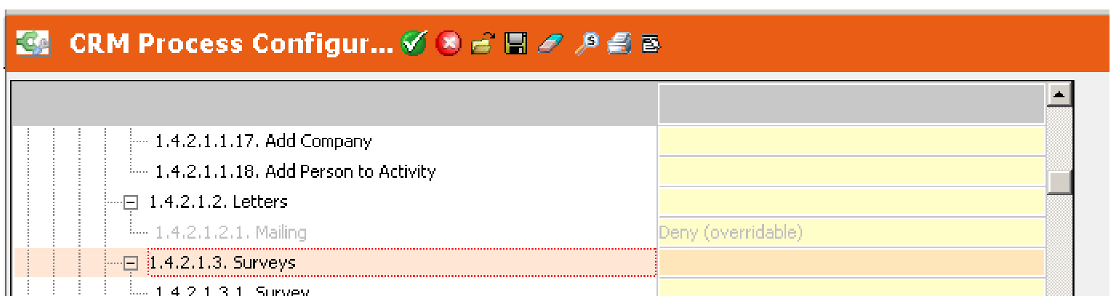
- **FI Tree View**

  The following elements were included in the FI tree view.



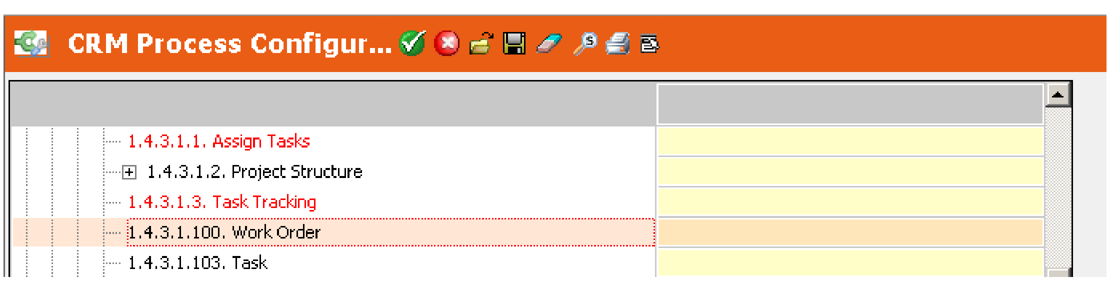
The Mailing (BR) nodes should only be visible if the role of the current user has access to the CRM process “1.4.2.1.2.1 Mailing”

The default CRM process configuration has denied the access to this CRM process.

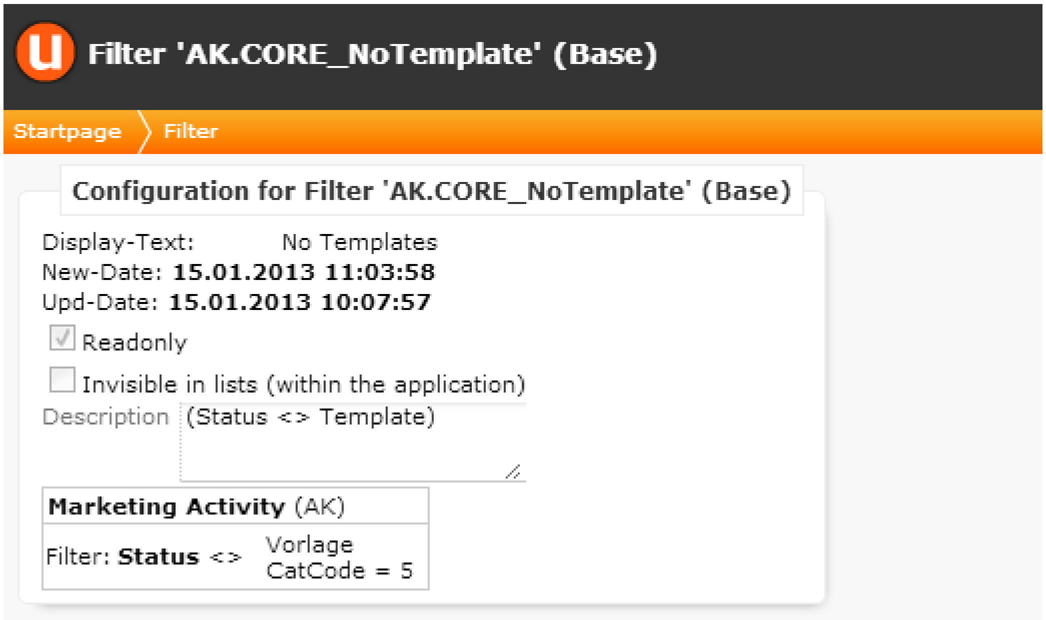


The Work Order (AF) nodes should only be visible if the role of the current user has access to the CRM process “1.4.3.1.100 Work Order”

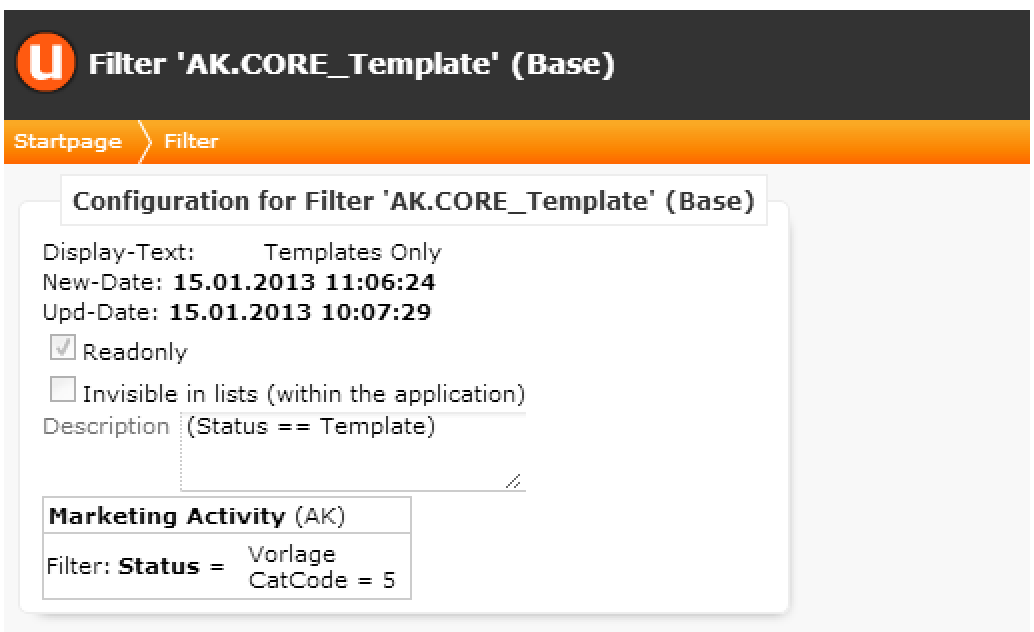
The default CRM process configuration allows accessing this CRM Process.



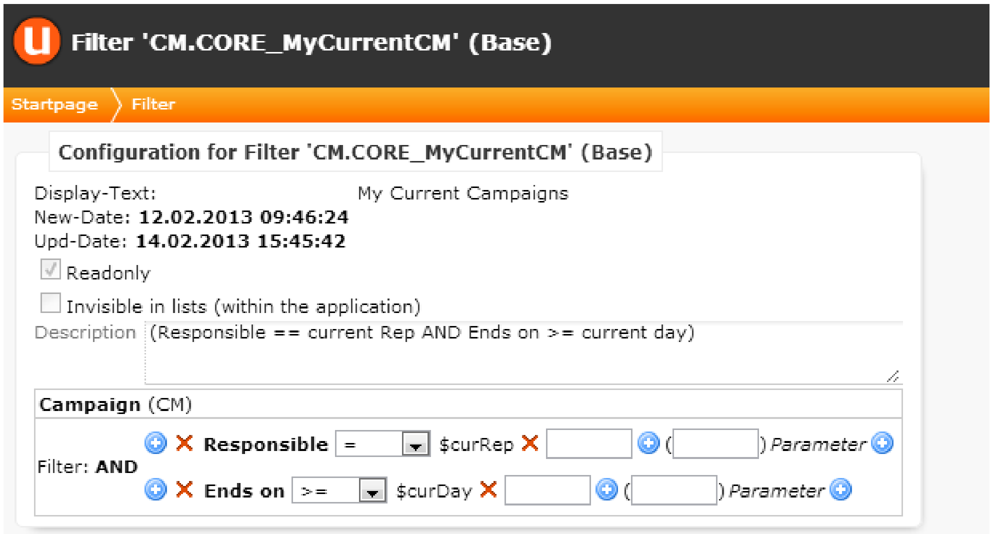
- **AK.CORE_NoTemplate Filter**



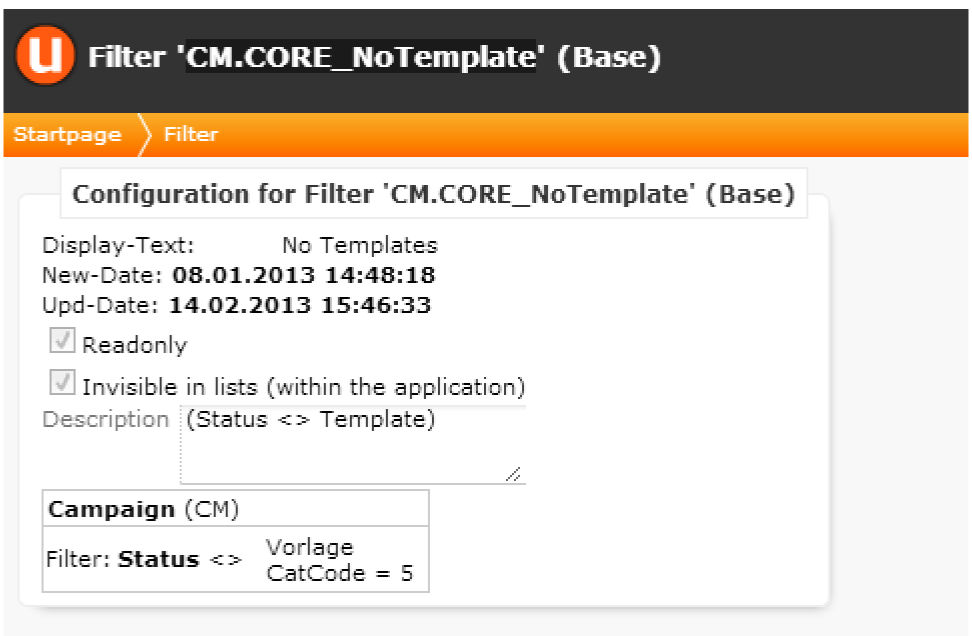
- **AK.CORE_Template Filter**



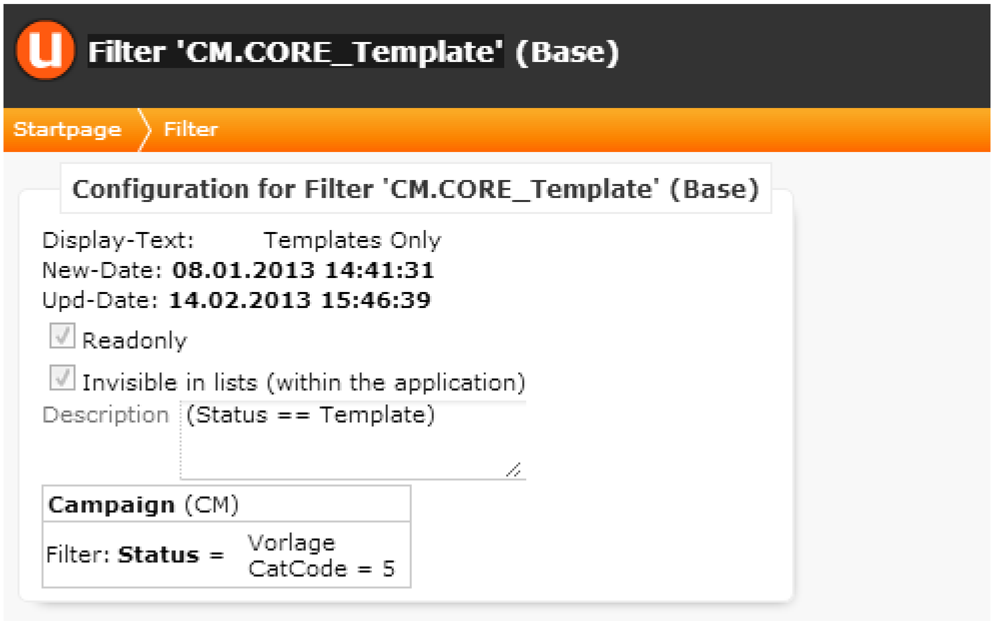
- **CM.CORE_MyCurrentCM Filter**



- **CM.CORE_NoTemplate Filter**



- **CM.CORE_Template Filter**



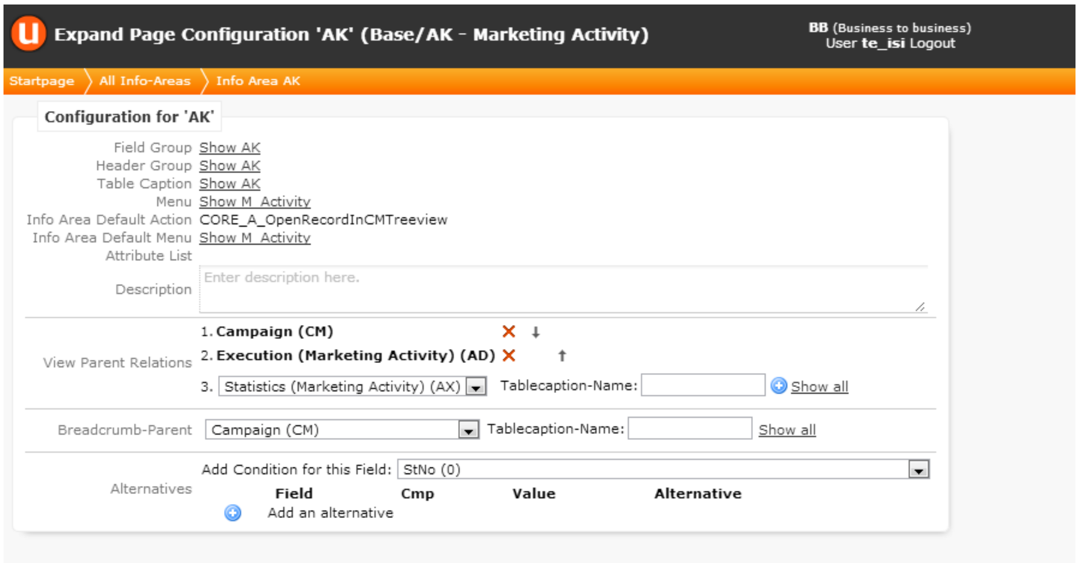
- **Find-as-you-type functionality**

  The following functions are defined to enable find-as-you-type functionality in various info areas for the campaign and event management.

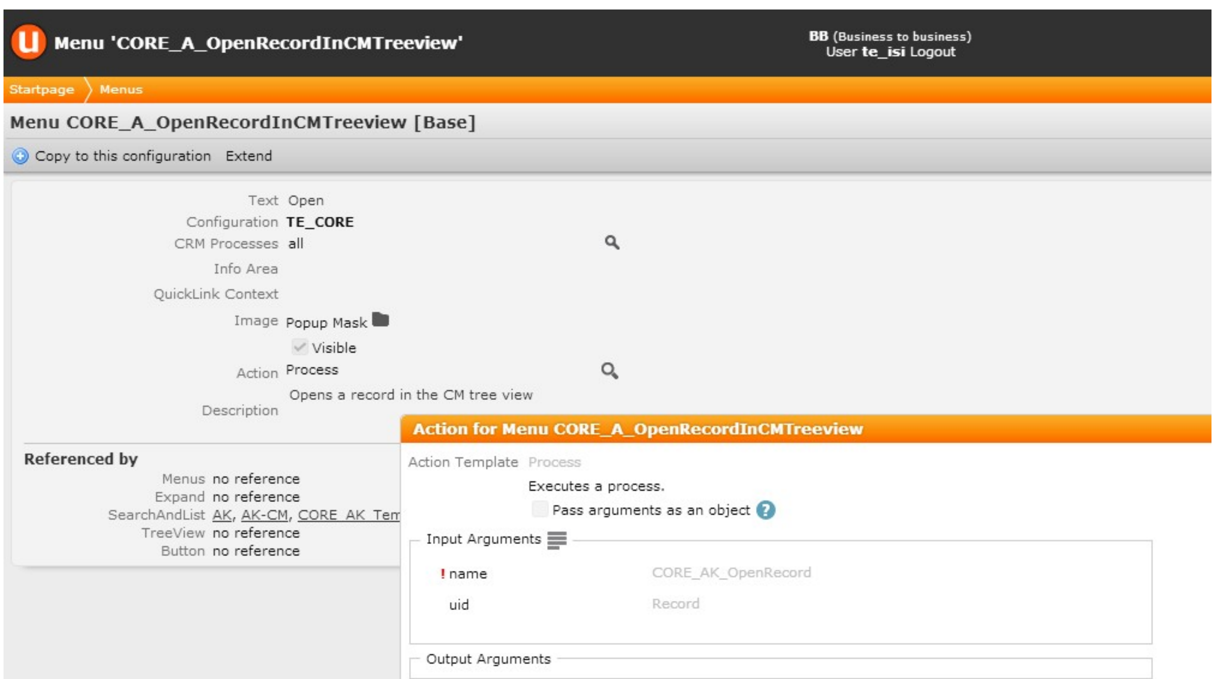
  Queries AK.FindAsYouType, CM.FindAsYouType, F1.FindAsYouType, FI.FindAsYouType, KP.FindAsYouType, MA.FindAsYouType, V1.FindAsYouType, V2.FindAsYouType, V4.FindAsYouType

- **AK Expand Page**

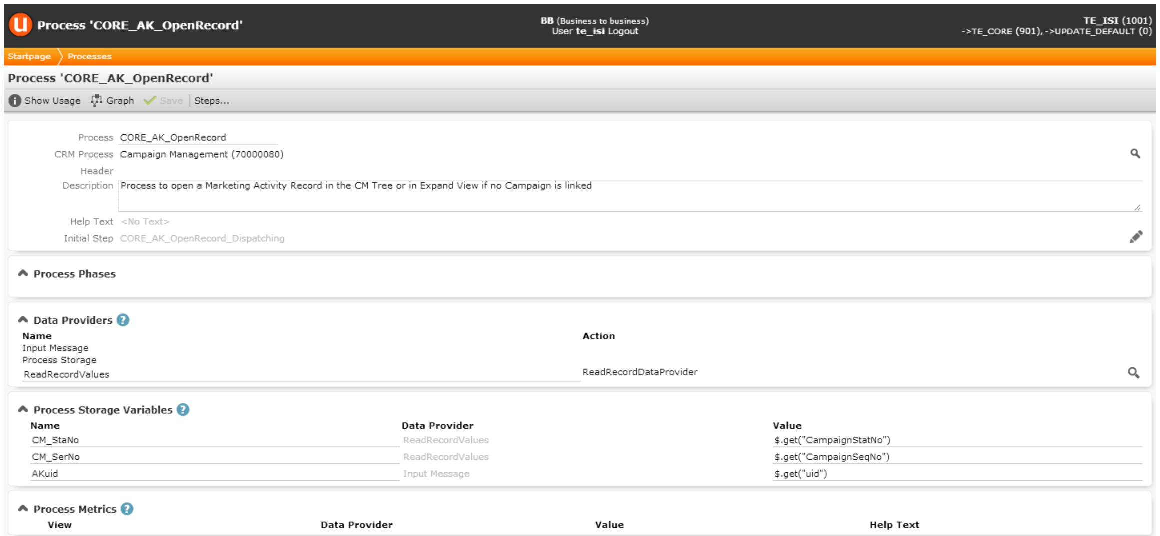
  Defines that the default action for the info area is CORE_A_OpenRecordInCMTree-view. This action opens an AK record that "belongs" to a campaign (CM) in the tree view of the campaign. An AK record that is "standalone" (does not belong to a campaign) is opened in the tab view of AK.

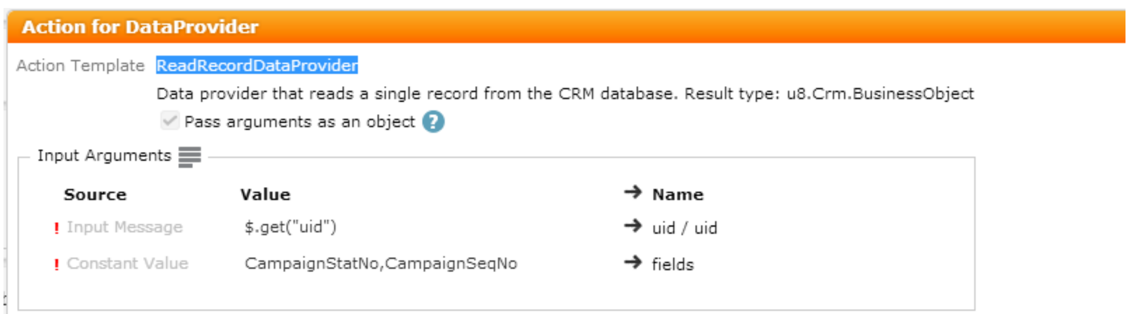


- **CORE_A_OpenRecordInCMTreeview Menu**

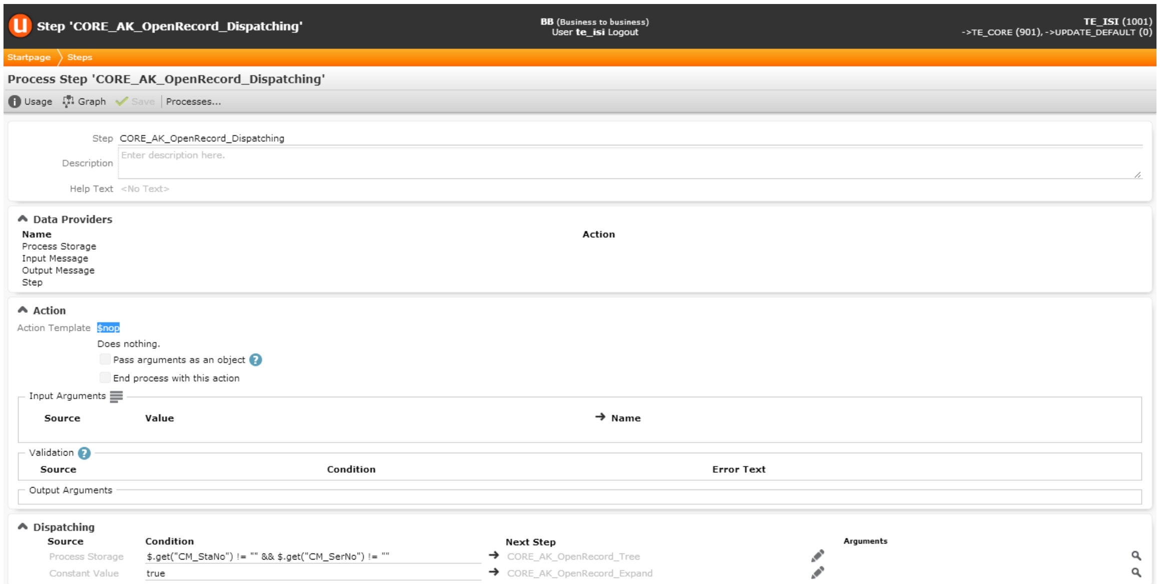


- ## CORE_AK_OpenRecord Process

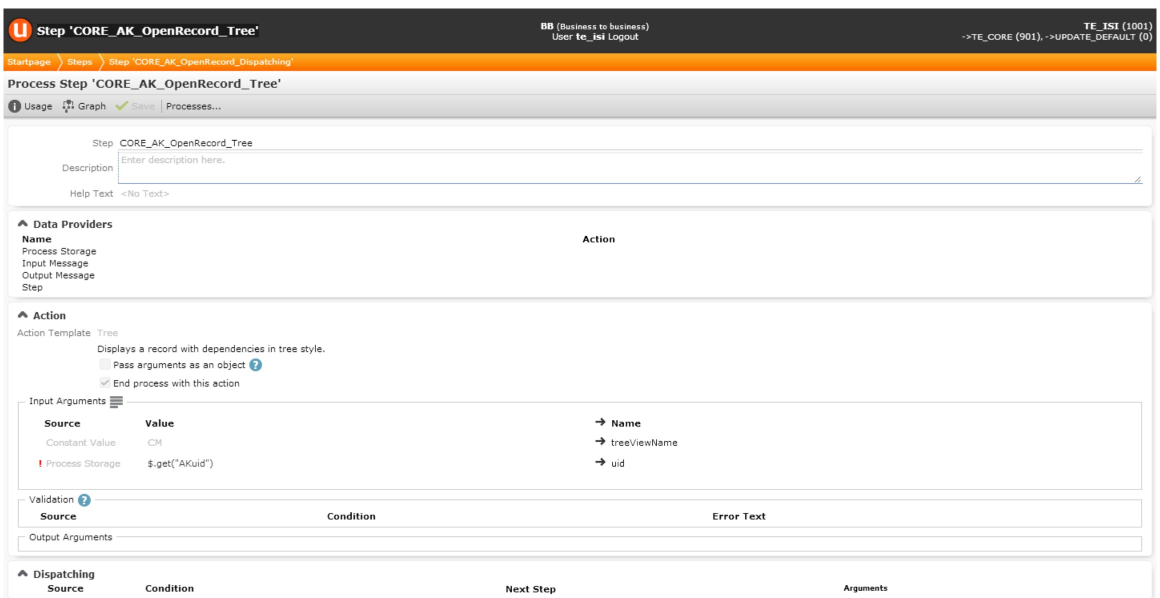




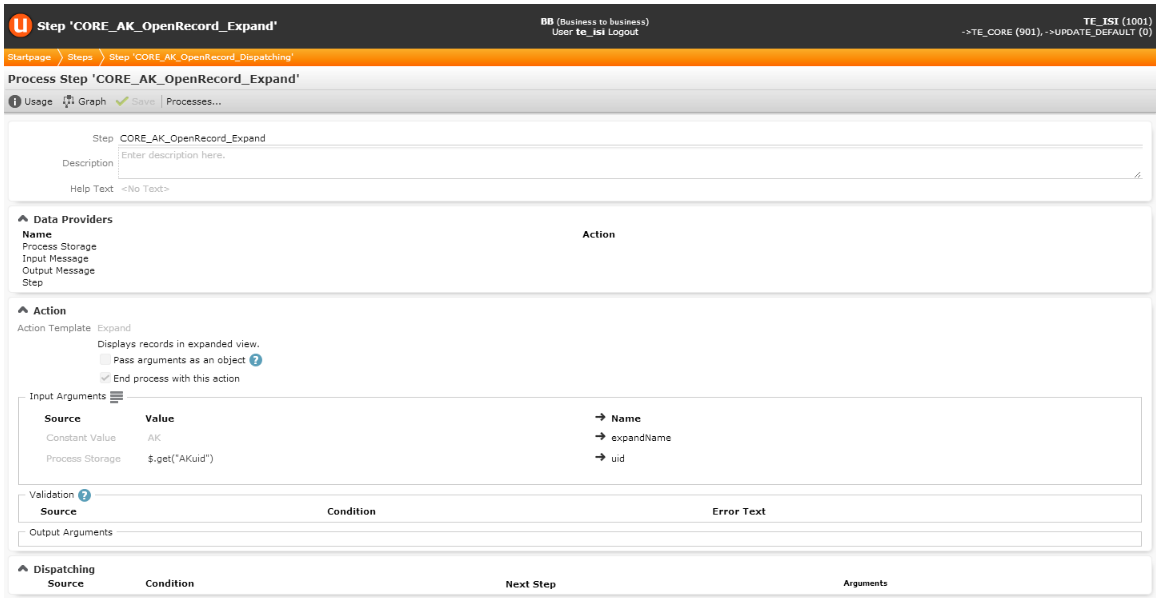
- **CORE_AK_OpenRecord_Dispatching Step**



- **CORE_AK_OpenRecord_Tree Step**



- **CORE_AK_OpenRecord_Expand Step**

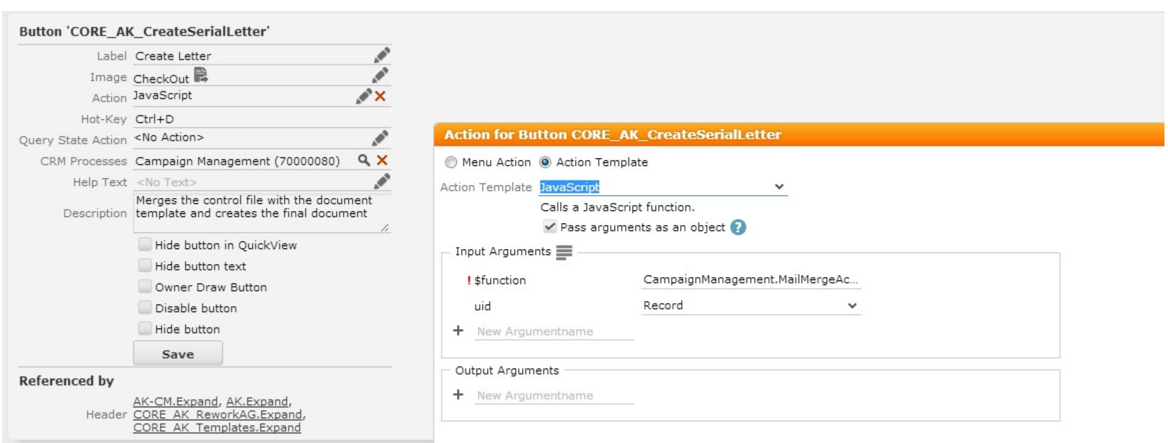


- **CORE_TD_AK Field Group**

  Defined element: List. Used to display the TD records as a sub-list of the AK mask.

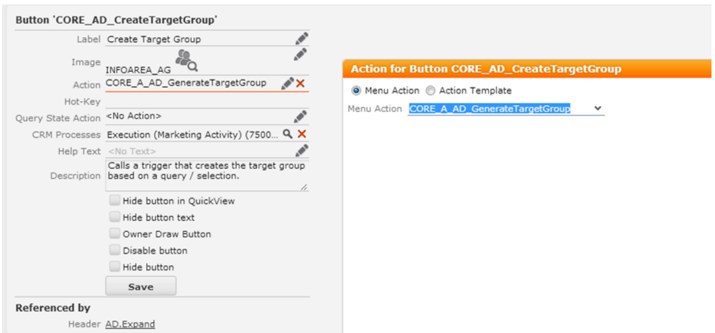
- **CORE_AK_CreateSerialLetter Button**

  Used to create a mail merge letter from a control file and a document template.



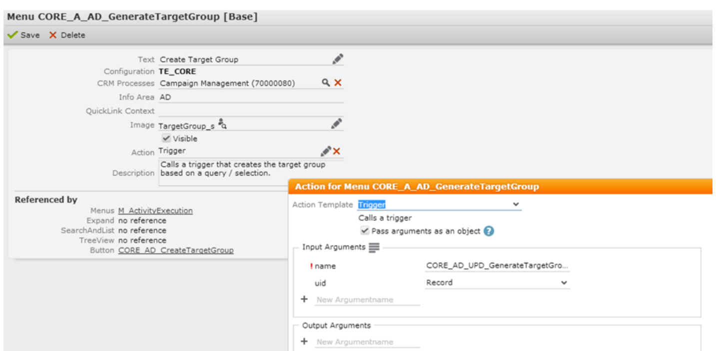
- **CORE_AD_CreateTargetGroup Button**

Attention: This element does not exist in v3 or higher. A button from the UP-DATE_DEFAULT is used.



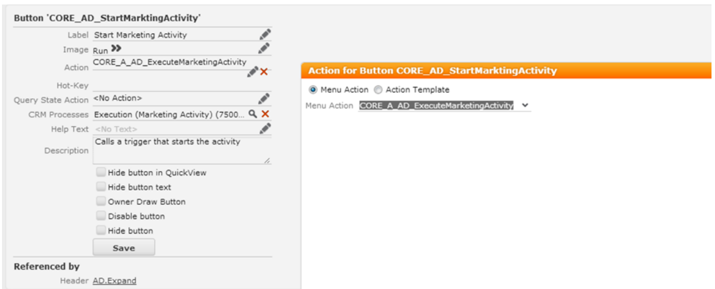
- **CORE_A_AD_GenerateTargetGroup Menu**

Attention: This element does not exist in v3 or higher. A button from the UP-DATE_DEFAULT is used.



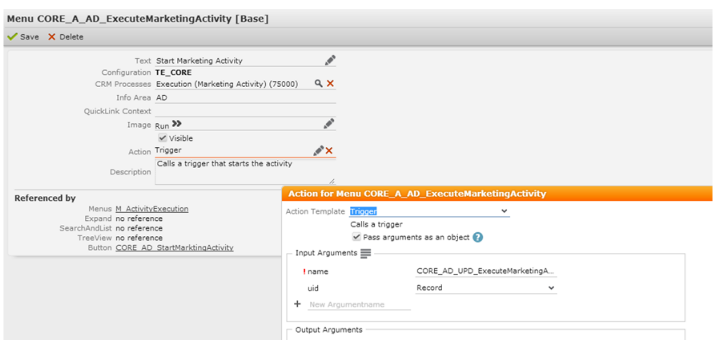
- **CORE_AD_StartMarktingActivity Button**

Attention: This element does not exist in v3 or higher. A button from the UP-DATE_DEFAULT is used.

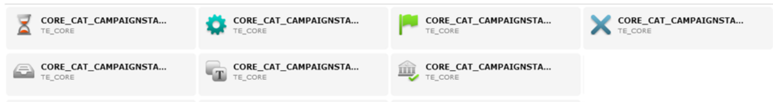


- **CORE_A_AD_ExecuteMarketingActivity Button**

Attention: This element does not exist in v3 or higher. A button from the UP-DATE_DEFAULT is used.

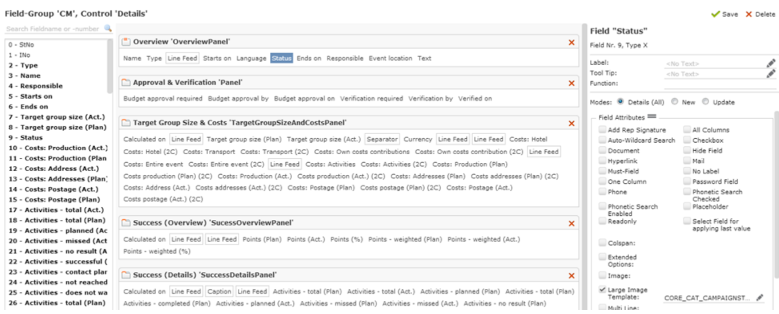


- **CORE_CAT_CAMPAIGNSTATUS_0 - CORE_CAT_CAMPAIGNSTATUS_6 Images**



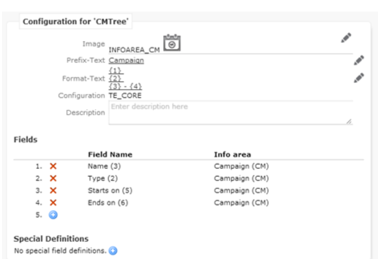
Files: u8-open.png, u8-progress.png, u8-completed.png, u8-missed.png, u8-archive.png, u8-template.png, u8-budget-approval.png.

Used in the Field Group CM, field Status, Field Attribute: Large Image Template



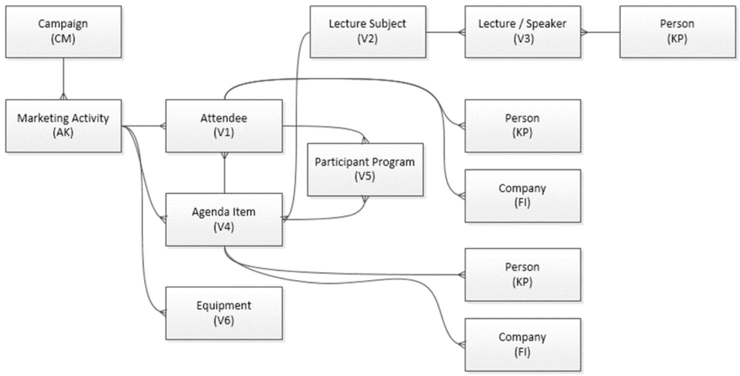
- **Caption CMTree Table**

Used in the default CM tree as table header.



Event Management(CRM #70000090)

Learn about event management configurations.



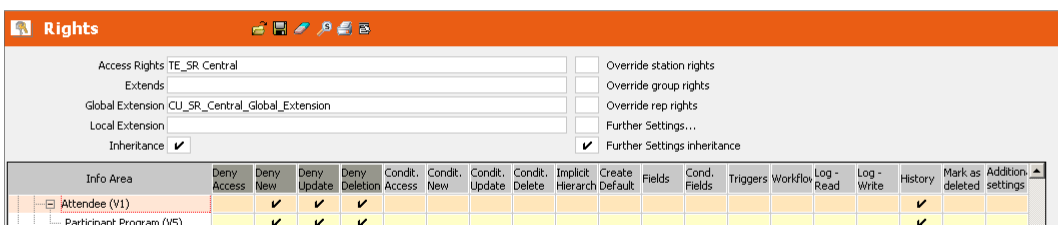
Rights and Triggers

Learn about the rights for various info areas.

Rights for following info areas are defined:

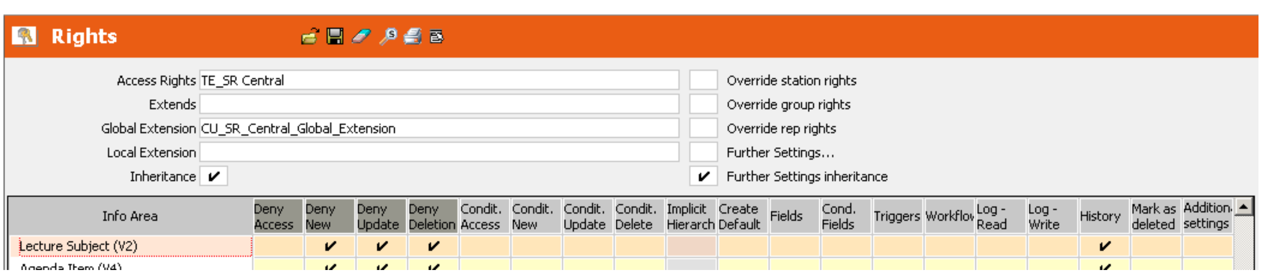
Rights for Attendee (V1) Info Area

The info area is defined as visible in the main right but the actions new, update or delete are disabled.



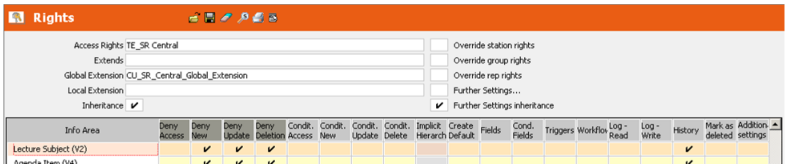
Rights for Lecture Subject (V2) Info Area

In the main right the info area is defined as visible but the actions new, update or delete are disabled.



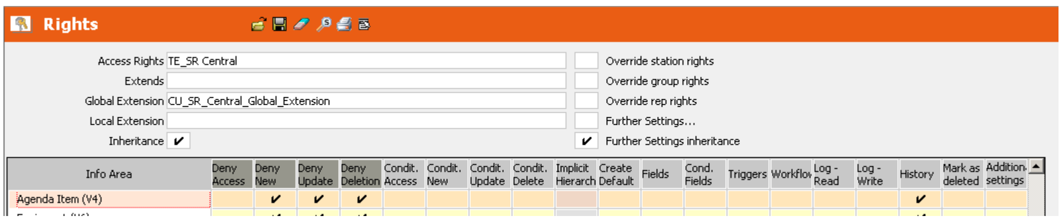
Rights for Lecture/Speaker (V3) Info Area

In the main right the info area is defined as visible but the actions new, update or delete are disabled.



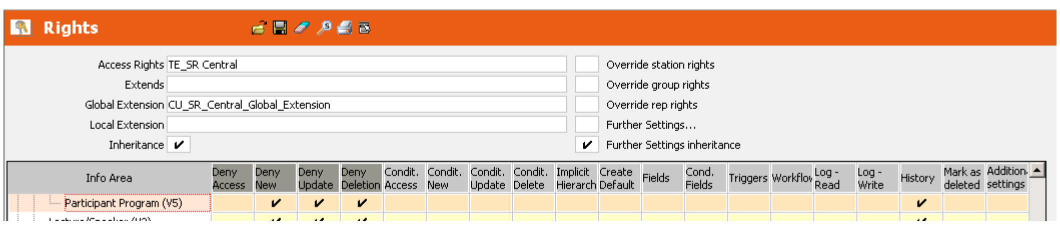
Rights for Info Agenda Item (V4)

In the main right the info area is defined as visible but the actions new, update or delete are disabled.



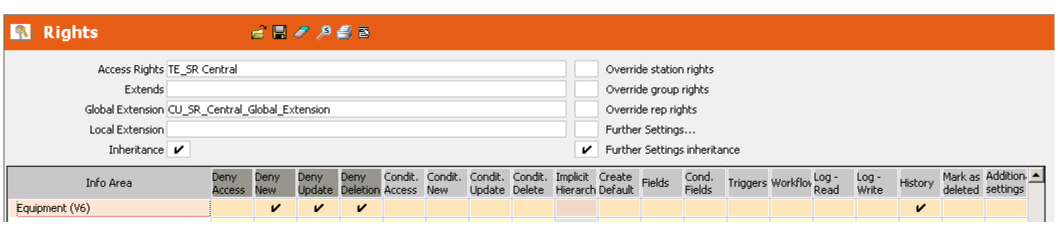
Rights for Info Participant Program (V5)

In the main right the info area is defined as visible but the actions new, update or delete are disabled.



Rights for Info Area Equipment (V6)

In the main right the info area is defined as visible but the actions new, update or delete are disabled.



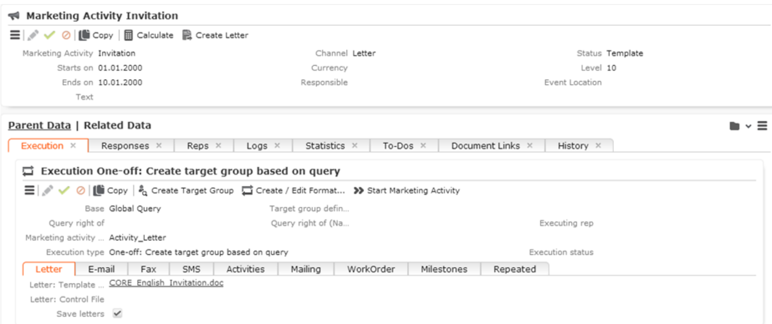
Campaign Templates

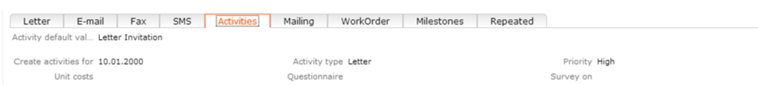
Learn about the defined campaign template.

The following campaign templates are defined:

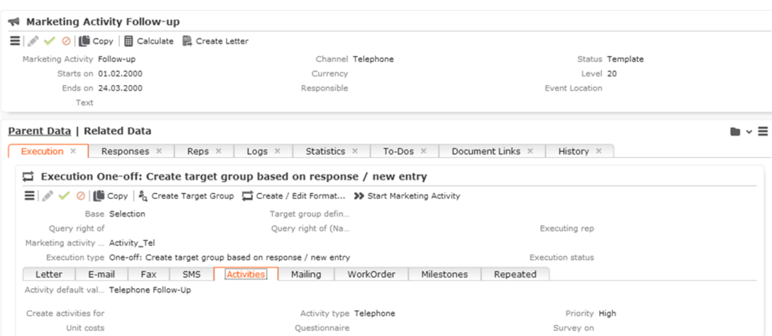
Template: Event (StNo: 10000 INo: 7)

Marketing Activity & Execution “Invitation”

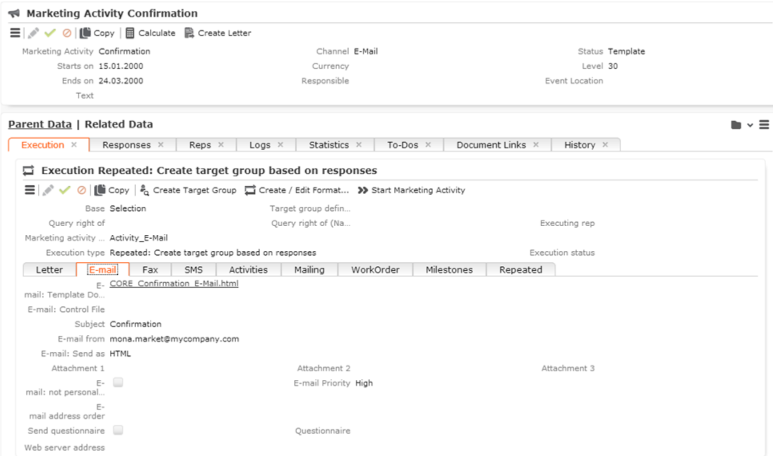


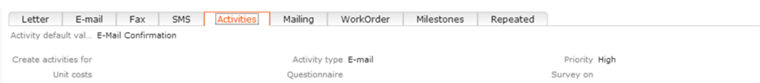


Marketing Activity & Execution “Follow-Up”

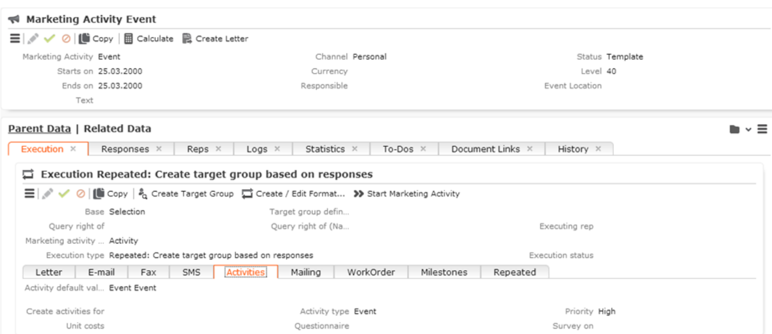


Marketing Activity & Execution “Confirmation”

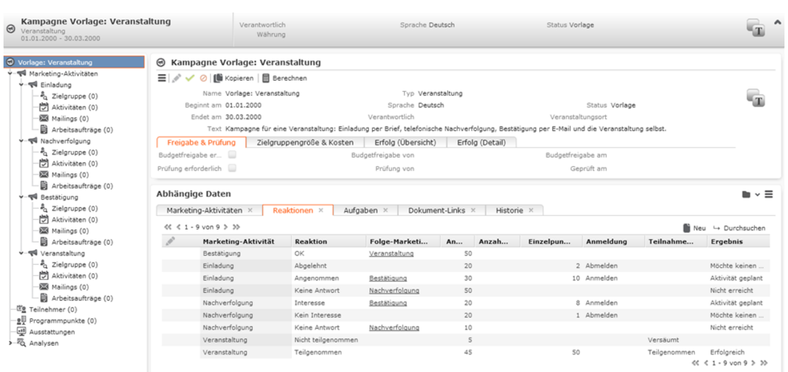




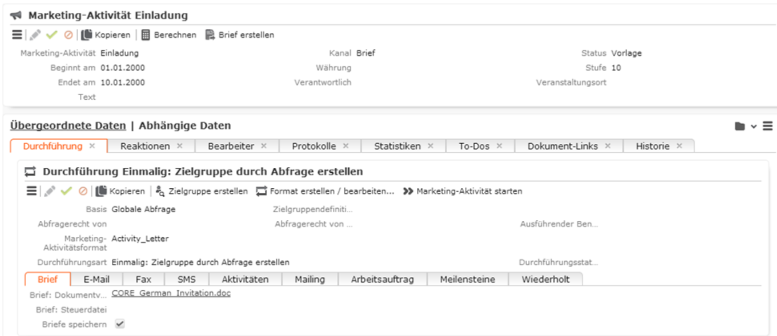
Marketing Activity & Execution “Event”



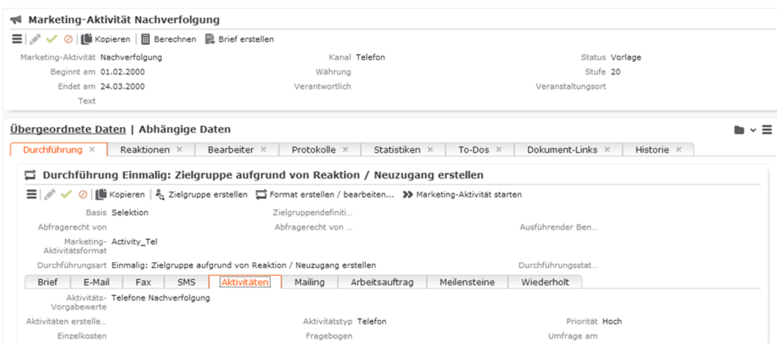
Vorlage: Veranstaltung (StNo: 10000 INo: 10)



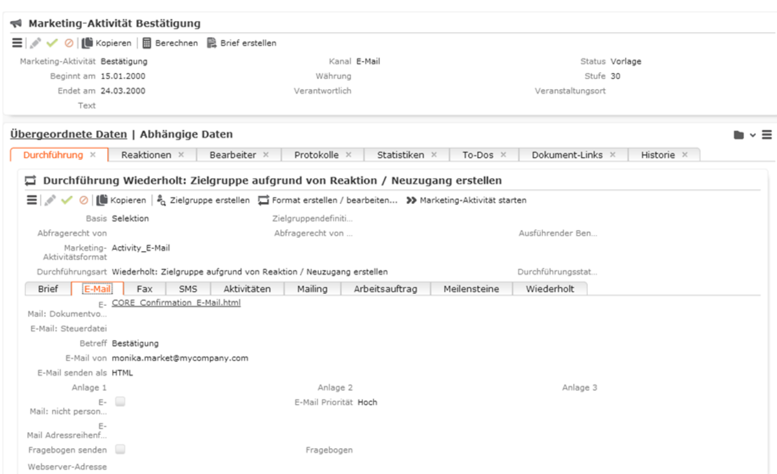
Marketing Activity & Execution “Einladung”

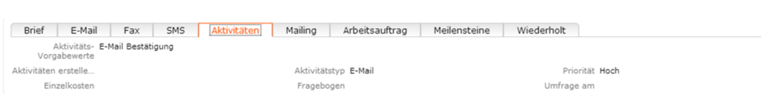


Marketing Activity & Execution “Nachverfolgung”

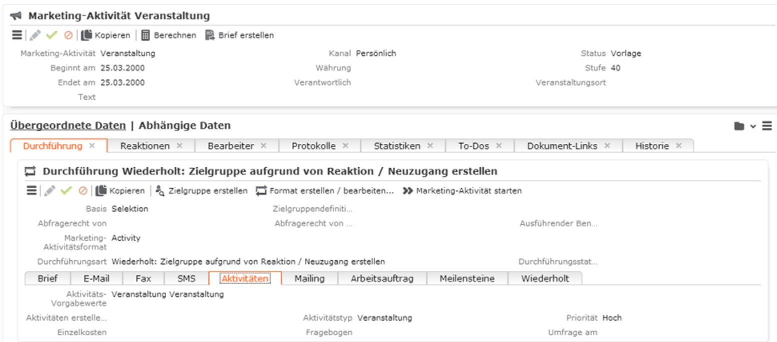


Marketing Activity & Execution “Bestätigung”





Marketing Activity & Execution “Veranstaltung”



Catalogs

Learn about the variable catalog.

Variable Catalogs

486 Teilnehmertyp

Katalog

Teilnehmertyp (Teilnehmer) [48 Anz. 4

Mandant	Ext. Schlüssel	Spe	0001 TE_Base	Ext. Schlüssel	Spe	0100 TE_German	Ext. Schlüssel	Spe	0101 TE_English
9000	10000_486_4		Own Staff			Eigener Mitarbeiter			Own Staff
9000	10000_486_1		Participant			Teilnehmer			Participant
9000	10000_486_2		Speaker			Sprecher			Speaker
9000	10000_486_3		VIP Participant			VIP-Teilnehmer			VIP Participant

489 Themengruppe

Katalog

Themengruppe (Thema) [489] Anz. 5

Mandant	Ext. Schlüssel	Spe	0001 TE_Base	Ext. Schlüssel	Spe	0100 TE_German	Ext. Schlüssel	Spe	0101 TE_English
9000	10000_489_1		Customer Presentation			Kundenvortrag			Customer Presentation
9000	10000_489_2		Demonstration			Vorführung			Demonstration
9000	10000_489_3		Introduction			Einleitung			Introduction
9000	10000_489_4		Product Presentation			Produktpräsentation			Product Presentation
9000	10000_489_5		Workshop			Workshop			Workshop

490 Ausstattung

Katalog

Ausstattung (Ausstattung) [49 Anz. 14

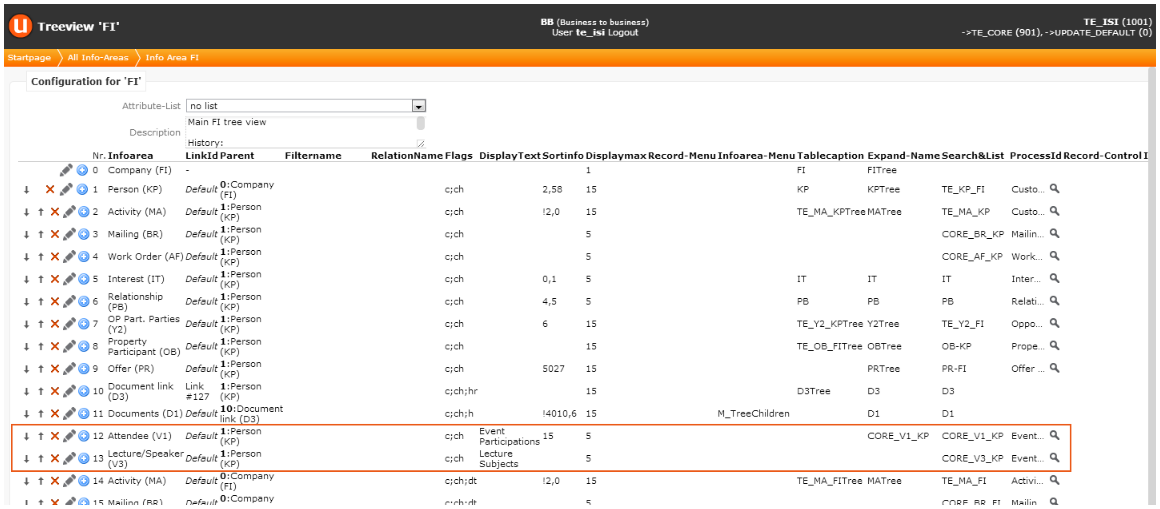
Mandant	Ext. Schlüssel	Spe	0001 TE_Base	Ext. Schlüssel	Spe	0100 TE_German	Ext. Schlüssel	Spe	0101 TE_English
9000	10000_490_10		Brochures			Kataloge			Brochures
9000	10000_490_9		Catering			Catering			Catering
9000	10000_490_1		Extra Seats			Extra Bestuhlung			Extra Seats
9000	10000_490_2		Flip Chart			Flipchart			Flip Chart
9000	10000_490_4		Laptop / PC			Notebook / PC			Laptop / PC
9000	10000_490_3		Lunch			Mittagessen			Lunch
9000	10000_490_11		Microphone			Mikrofon			Microphone
9000	10000_490_8		Name Badges			Namenskarten			Name Badges
9000	10000_490_12		Notepad			Notizblock			Notepad
9000	10000_490_13		Pens / Pencils			Stifte / Bleistifte			Pens / Pencils
9000	10000_490_5		Projector			Beamer			Projector
9000	10000_490_6		Seating			Bestuhlung			Seating
9000	10000_490_14		TV Screen			TV-Bildschirm			TV Screen
9000	10000_490_7		Whiteboard			Whiteboard			Whiteboard

Designer Configuration

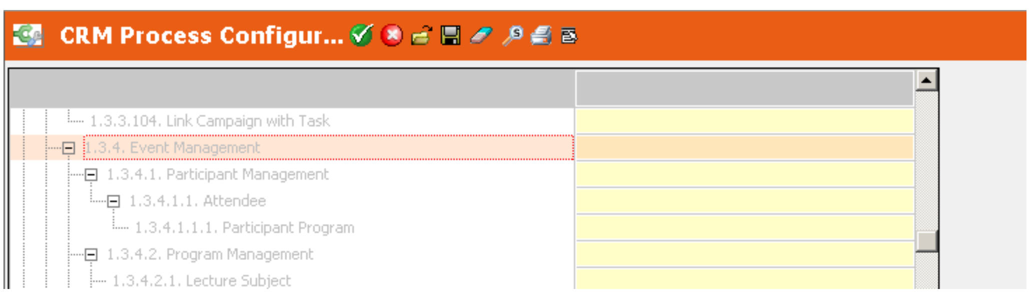
Learn about the basic designer configuration for event management.

Tree View FI

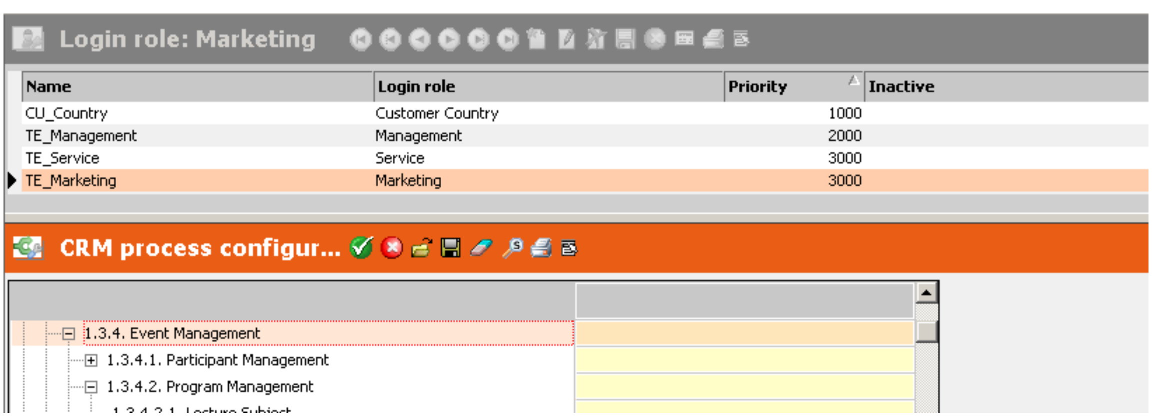
The following elements were included in the FI tree view.



The Attendee (V1) node and the Lecture/Speaker (V3) should only be visible if the role of the current user has access to the CRM process “1.3.4. Event Management”:

- The standard CRM process configuration has denied the access to this CRM process:
- 

- The Marketing login role has access to this CRM process:



CORE_V3_KP Search&List and Field Group

Defined elements: Details, List and Search. Used in the FI tree view for the lecture subjects node (V3).

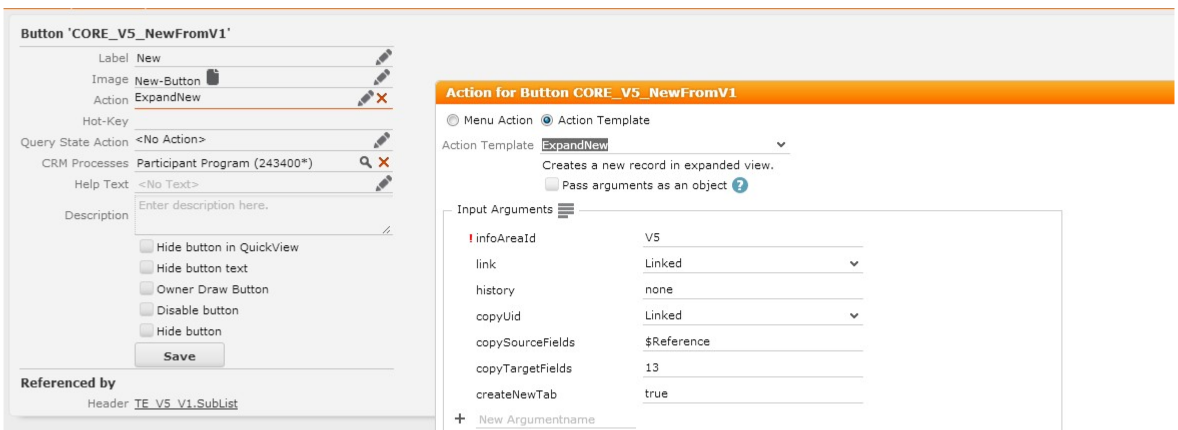
CORE_V3_V2 Field Group

Defined elements: List and MiniDetails. Used in the ExpandChildren header of the V2 header group in order to display the speakers (V3) below the lecture subject mask (V2).

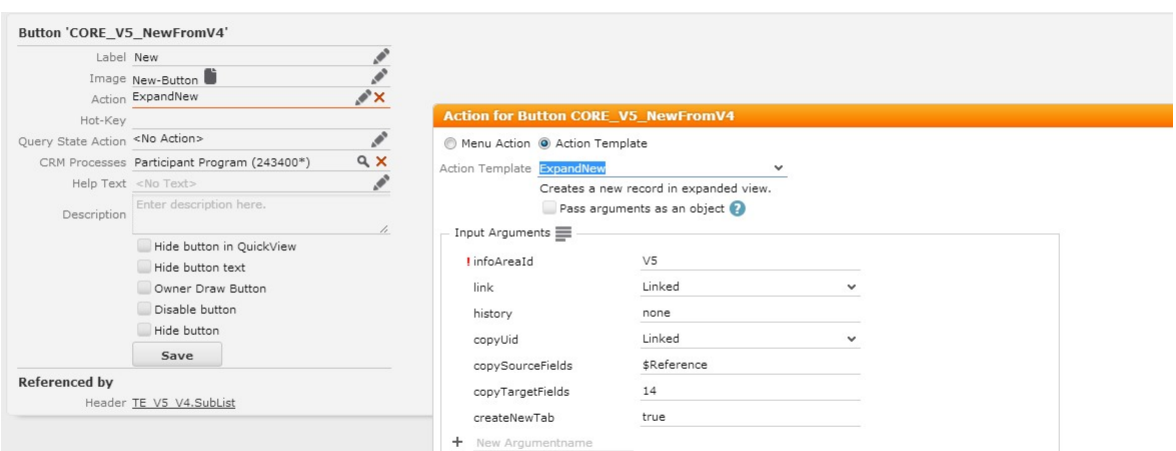
CORE_V4_V2 Field Group

Defined elements: List and MiniDetails. Used in the ExpandChildren header of the V2 header group in order to display the agenda items (V4) below the lecture subject mask (V2).

CORE_V5_NewFromV1 Button



Button CORE_V5_NewFromV4

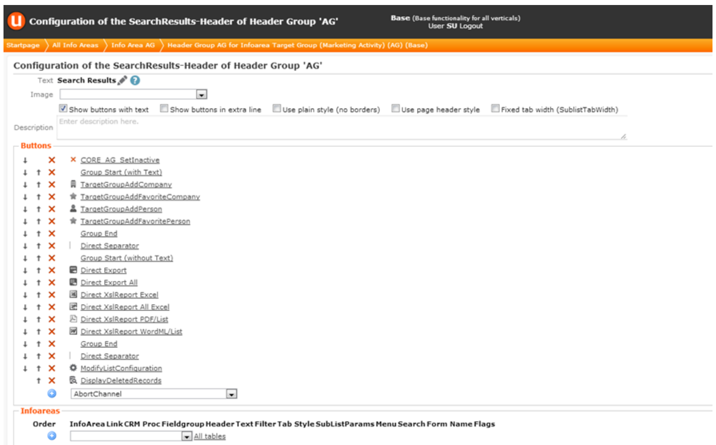


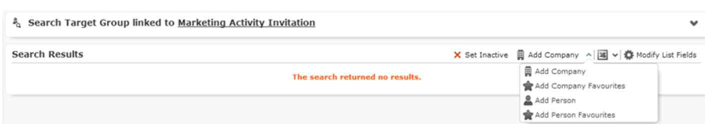
Process Rework Target Group

This process is designed to support the re-working of an automatically generated target group, e.g. by a sales rep.

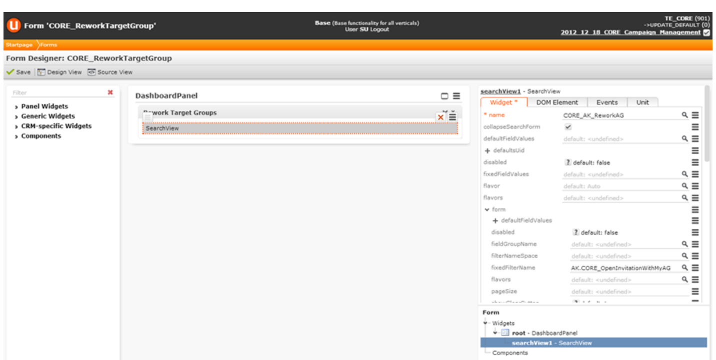
Designer Configuration

SearchResults-Header of Header Group AG

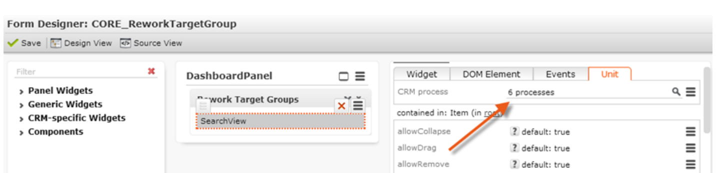




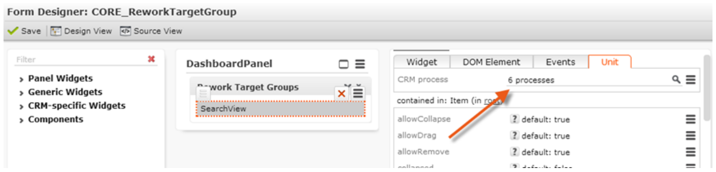
CORE_ReworkTargetGroup Form

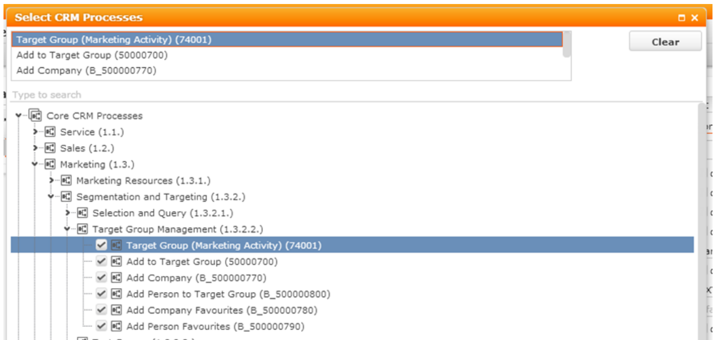


The form is assigned to the following processes:



If the role of a user (group) has the right to access this process, then the form is displayed (e.g. on the start page of the user).

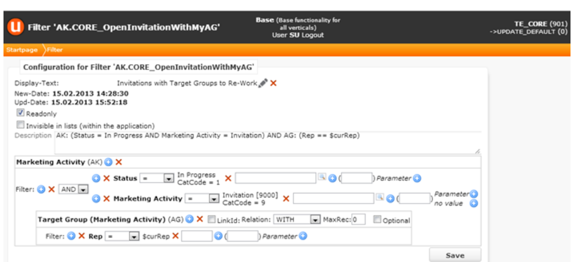




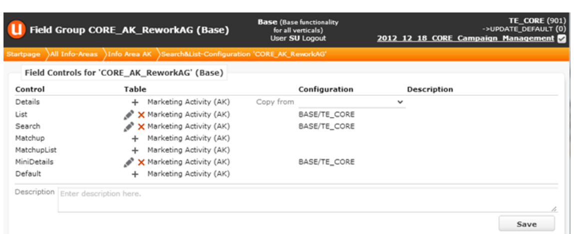
AK.CORE_OpenInvitationWithMyAG Filter

This filter is used to display just the relevant marketing activity (AK) records, e.g. on the start page of a sales user.

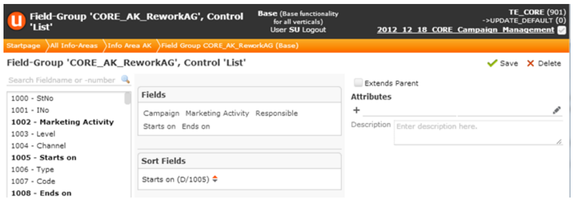
CORE_AK_ReworkAG Search&List

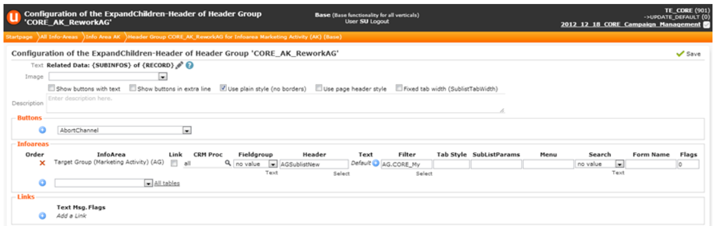


CORE_AK_ReworkAG Field Group

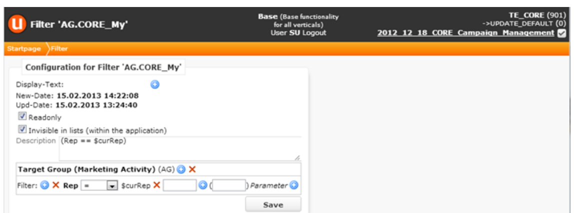


CORE_AK_ReworkAG List

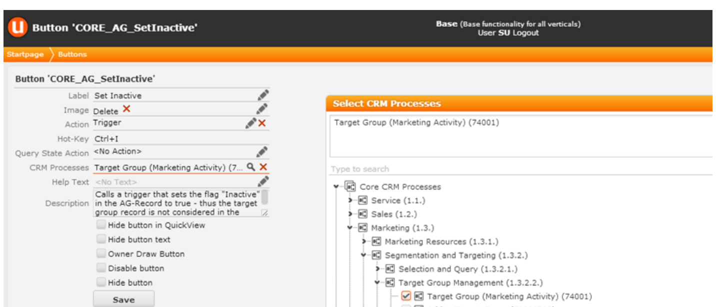




AG.CORE_My Filter

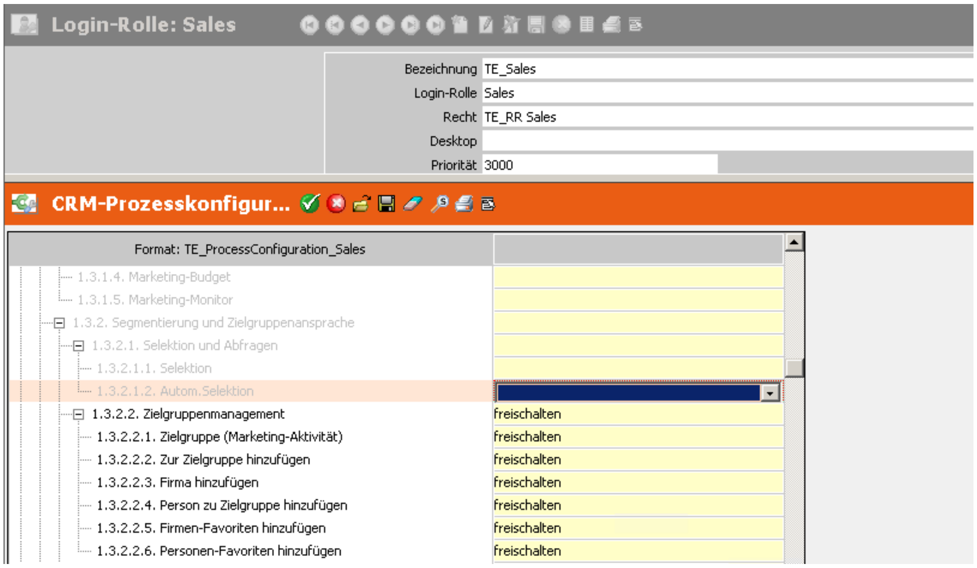


CORE_AG_SetInactive Button



CRM Processes

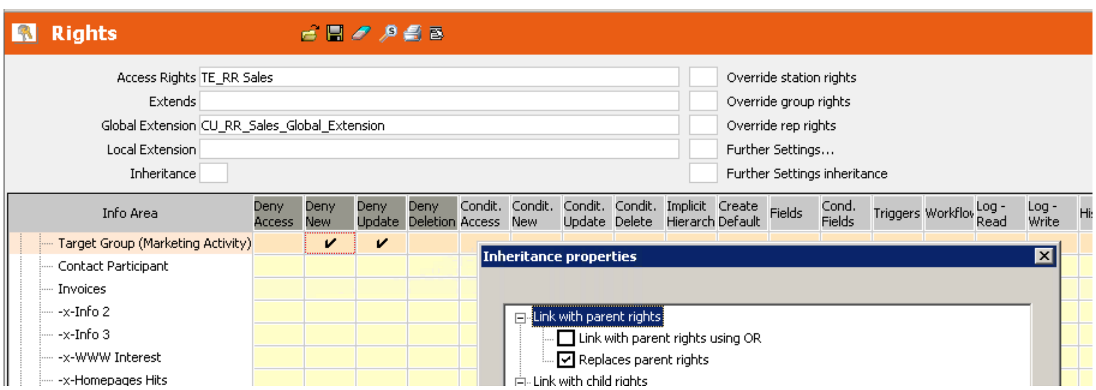
The CRM process configuration was changed accordingly in order to display the elements that are assigned to the processes under “Target Group Management (1.3.2.2.)” for the sales users.



This should display the “Form Designer: CORE_ReworkTargetGroup” form on the start page of a sales user.

Rights

The “TE_RR_Sales” right was changed accordingly in order to enable the sales user to add or edit (set the “Inactive” flag) target group records.

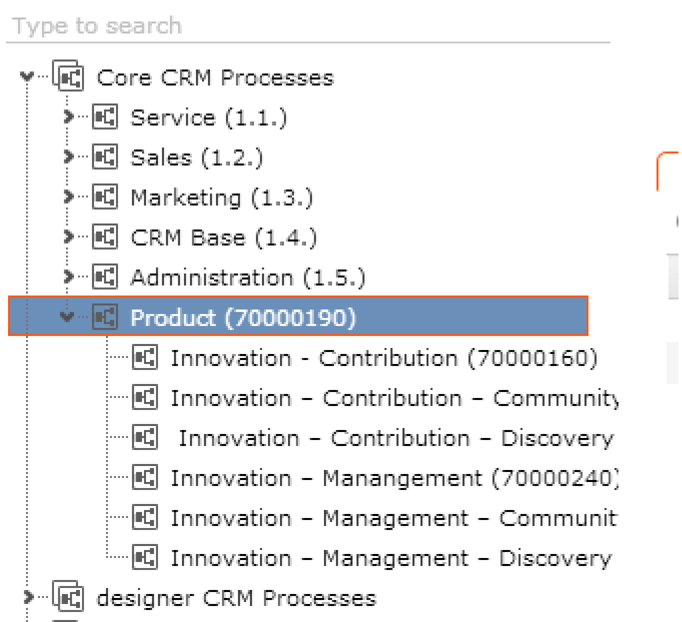


Innovation Management(CRM #70000190)

Learn about the processes for innovative management.

Processes

This process is only available if the role has access to the “Core CRM Process Produkt Management Innovation” (1.6.1 / 70000160) process


Type to search
Core CRM Processes
Service (1.1.)
Sales (1.2.)
Marketing (1.3.)
CRM Base (1.4.)
Administration (1.5.)
Product (70000190)
Innovation - Contribution (70000160)
Innovation – Contribution – Community
Innovation – Contribution – Discovery
Innovation – Manangement (70000240)
Innovation – Management – Communit
Innovation – Management – Discovery
designer CRM Processes

Web Elements

Process

- CORE_Innovation_IdeaMgmt

Process Steps

- CORE_InnovationIdeaMgmt_ChangeToBacklog
- CORE_InnovationIdeaMgmt_ChangeToEvaluation
- CORE_InnovationIdeaMgmt_ChangeToRealization
- CORE_InnovationIdeaMgmt_ChangeToArchive
- CORE_InnovationIdeaMgmt_CheckRepRole
- CORE_InnovationIdeaMgmt_DisplayAppropriateIAForm
- CORE_SocialIdeaManagement_GetTwistId
- CORE_SocialIdeaManagement_NewIdea
- CORE_SocialIdeaManagement_UpdateTwist

Buttons

- CORE_IA_NewIdea
- CORE_IA_ChangePhaseToArchive
- CORE_IA_ChangePhaseToBacklog
- CORE_IA_ChangePhaseToEvaluation
- CORE_IA_ChangePhaseToRealization
- CORE_IA_InnovationMgmt_ChangeCommunityStage
- CORE_InnovationIdeaMgmt_NewCommunityComment
- CORE_InnovationIdeasMgmt_NewInternalComment
- CORE_InnovationIdeaMgmt_NewCommunitySolution
- CORE_InnovationIdeaMgmt_NewInternalSolution
- CORE_InnovationIdeaMgmt_SaveInternal
- CORE_TW_InnovationIdeaMgmt_Feedback

JavaScript

Forms

- CORE_Innovation_IdeaMgmt

Expand Configs

- IA
- IA.QuickView
- CORE_IA_IDEAMGMT_ProductManager
- CORE_MA_IDEAMGMT_CommunityComment
- CORE_MA_IDEAMGMT_CommunitySolution
- CORE_TW_IDEAMGMT_Feedback
- CORE_NO_IDEAMGMT_InternalComment
- CORE_NO_IDEAMGMT_InternalSolution

Field groups

- IA
- CORE_IA_IDEAMGMT_QuickView
- CORE_IA_IDEAMGMT_ProductManagerView
- CORE_MA_IDEA
- CORE_TW_IDEAMGMT_Feedback
- CORE_NO_IDEAMGMT_InternalComment
- CORE_NO_IDEAMGMT_InternalSolution

Header groups

- IA
- CORE_IA_IDEAMGMT_FormArchive
- CORE_IA_IDEAMGMT_FormBacklog
- CORE_IA_IDEAMGMT_FormEvaluation
- CORE_IA_IDEAMGMT_FormRealization
- CORE_MA_IDEA_CommunityComment
- CORE_MA_IDEA_CommunitySolution
- CORE_TW_IDEAMGMT_Feedback
- CORE_NO_IDEAMGMT_InternalComments
- CORE_NO_IDEAMGMT_InternalSolu-

- \web\scripts\te.base\basecallbackfunctions.js
- \web\scripts\te.base\baseideamgmtfunctions.js
- \web\scripts\te.base\basequerystates.js

Menus/Actions

- CORE_ID_NET_IdeaMgmt
- CORE_C_QueryFieldValue
- CORE_C_QueryFieldValue2

tions

TableCaption

- IA

Special Header

- CORE_IdeaMgmt

Textgroup

- CORE_SocialIdeaManagement

Trigger/Rights

CORE_IA_MovePhaseToBacklog

Change the “stage” field to the “Backlog” (1) catalog entry.

CORE_IA_MovePhaseToArchive

Change the “stage” field to the “Completed” (4) catalog entry.

CORE_IA_MovePhaseToEvaluation

Change the “stage” field to the “Evaluation” (2) catalog entry.

CORE_IA_MovePhaseToRealization

Change the “stage” field to the “Realization” (3) catalog entry.

CORE_IA_DV

Default values for the IA info area.

CORE_SE_UPD_SetReadStatus_IfEmpty

Change the “Read Status” field if the field is empty.

CORE_TW_UPD_SetPhaseToListen_IfEmpty

Change the “Phase” field if the field is empty.

New ideas have the „readonly“stage and the stage has to be “Backlog” (the default assignment via BASE could have been changed).

CRM users cannot edit the idea fields Title (4), Text (5), Votes (6), ExtPostId (9), Social Communication Layer (10) if the SocCommLayer is "business-centered". Updating these fields must be restricted in the rights settings. This restriction should be the default for all 'human' users in the CRM system. The technical users that are used by the Aurea CRM interface (social dispatcher, loop) must be allowed to change these fields.

Sales

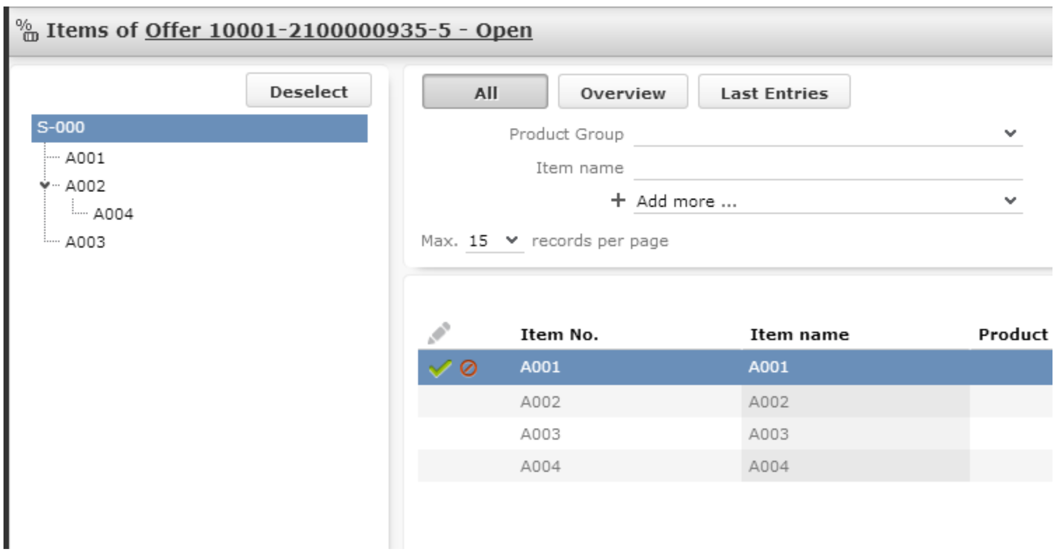
Learn how to manage sales and service.

Hierarchical Item Master Tree for Generic Serial Entry

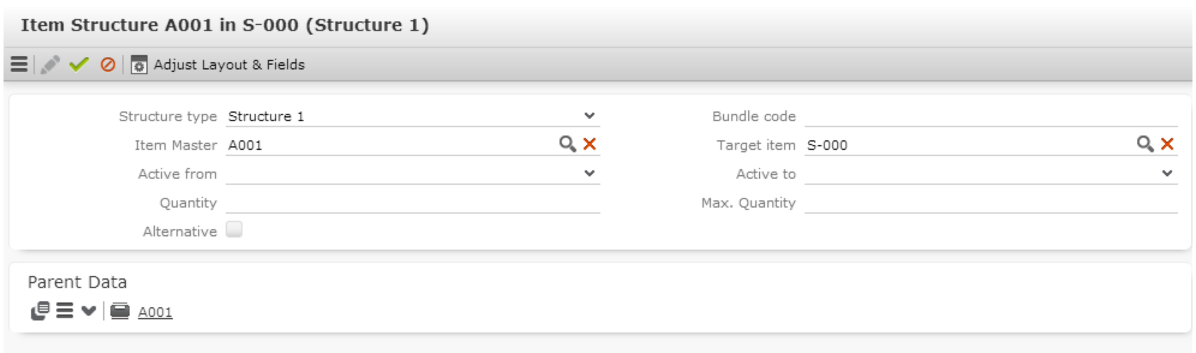
Learn how to display a hierarchical item master tree for generic serial entry.

This feature lets you display a hierarchical Item Master tree on the left side of your serial entry.

Note: This feature is not immediately visible in the ISI Template, you need to configure it.

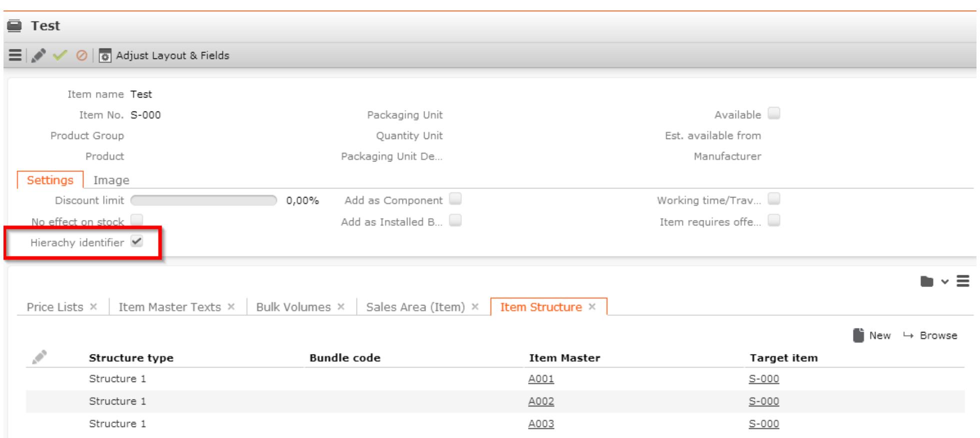


You need to configure item structures for your item masters:



- Structure type: should be Structure 1, as this type is displayed by default. If you want to display another structure type in your hierarchy tree you need to define a filter which filters for this structure type and assign it to your action template.
- Item Master: the actual Item Master which represents the node.
- Target item: this defines the parent of the node

Item Structure has been added as an expand children to the Item Master, here you can see all children Item Masters:

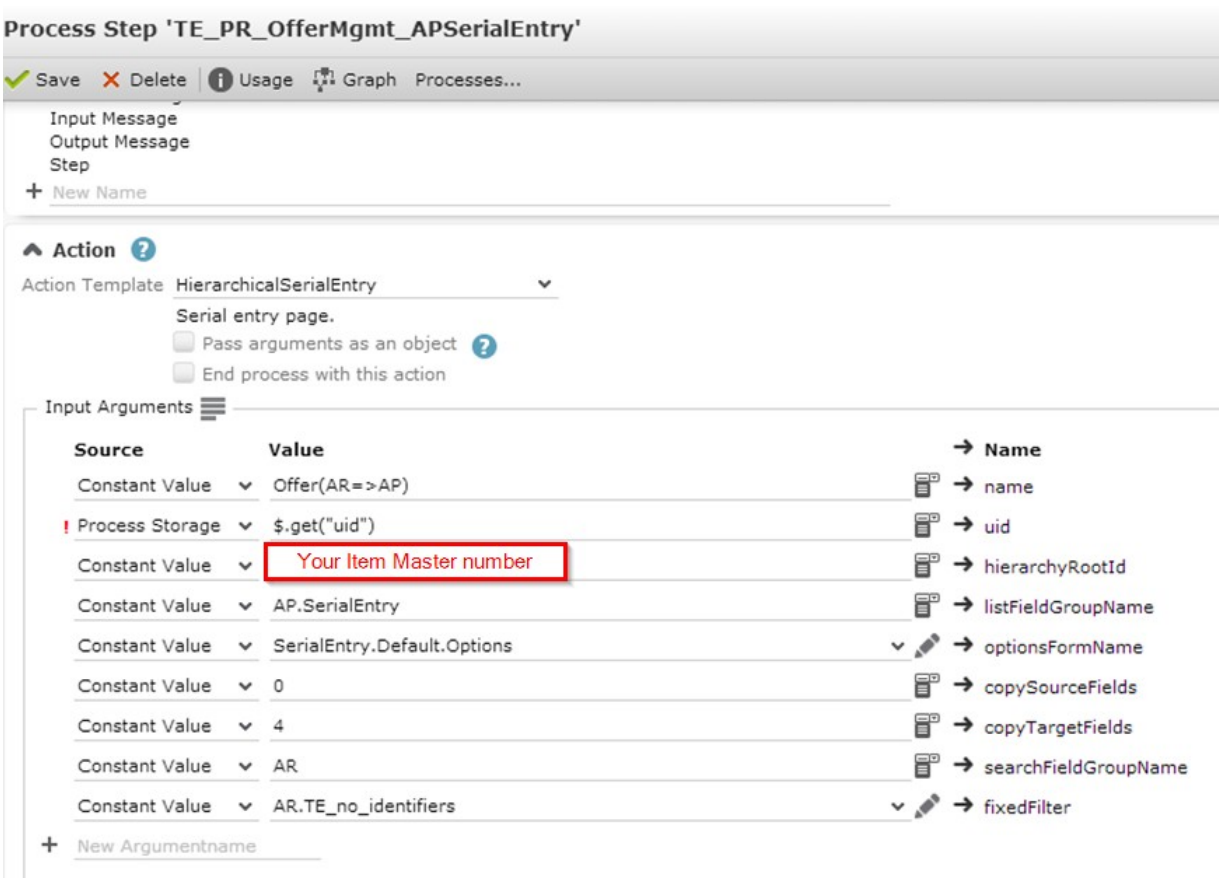


The field ‘Hierachy identifier’ has been added to the Item Master, if you do not want to have the root Item Master listed in your search of the serial entry, you can activate this field and filter it.

Furthermore the mandatory fields ‘Product Group’ and ‘Product’ are not mandatory anymore, because you don’t need to set them if you want to add an Hierachy identifier.

To show the tree in the offer process in the offer items serial entry, edit the process step ‘TE_PR_OfferMgmt_APSerialEntry’:

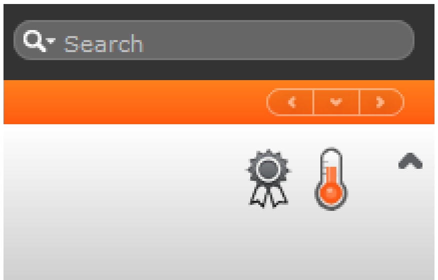
- change the action template to ‚HierarchicalSerialEntry’ and enter the ‘hierarchy-RootId’ (this is the item number of the root Item Master).
- alternatively you can configure the argument ‘hierarchyRootUid’ if you want to provide an uid
- note the fixed filter ‘AR.TE_no_identifiers’ has been added to the serial entry, to hide all Item Masters which have the flag ‘Hierachy identifier’ set to true



Key-Account Management

Key-Account Management has been completely revised in this version and is now separated into the Key-Account Dashboard as a Startpage and the Key-Account Dashboard integrated in the FI-Tree.

There is a new boolean field 'Key-Account' (5033) to mark companies as Key-Accounts. Depending on that field an image is shown in the header of the FI-Tree (Fieldgroup 'FITree' -> MiniDetails) and in the FI Search&List (Fieldgroup 'FI' -> List).



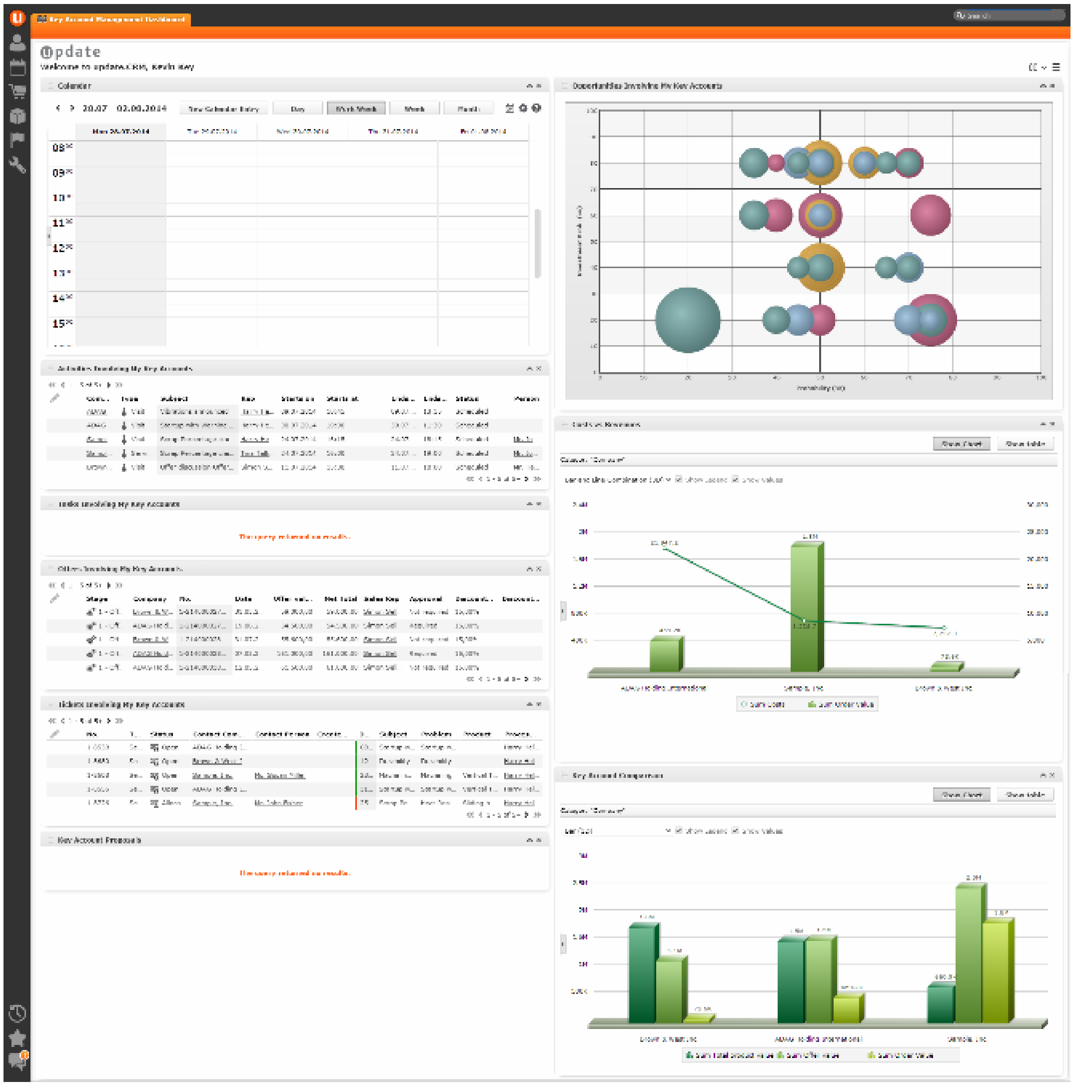
Key-Account Management Dashboard (Startpage)

Form: 'TE_Startpage_KeyAccountManagement'

Most Elements on this Startpage are straight forward but the Opportunity Matrix is a little bit special. The form widget itself does nothing else than calling it's own form and is used like a anchor in which the javascript places the xslt-report. The javascript is called through a handler which is only visible in the Source View of the Form-editor:

```
"events": [
  { "eventName": "onCreate", "handlerType": "Function", "handler": "u8.TeISI.ReportFunctions.run_opportunityMatrix(\"te.isi\\\\TE_Y1_Matrix.xslt\", \"TE_Startpage_KeyAccountManagement\");" }
],
```

This event is fired when the form is loaded and calls a javascript-function executing the right xslt to get rendered in the place of the 'anchor'.



Key-Account Dashboard (FI-Tree)

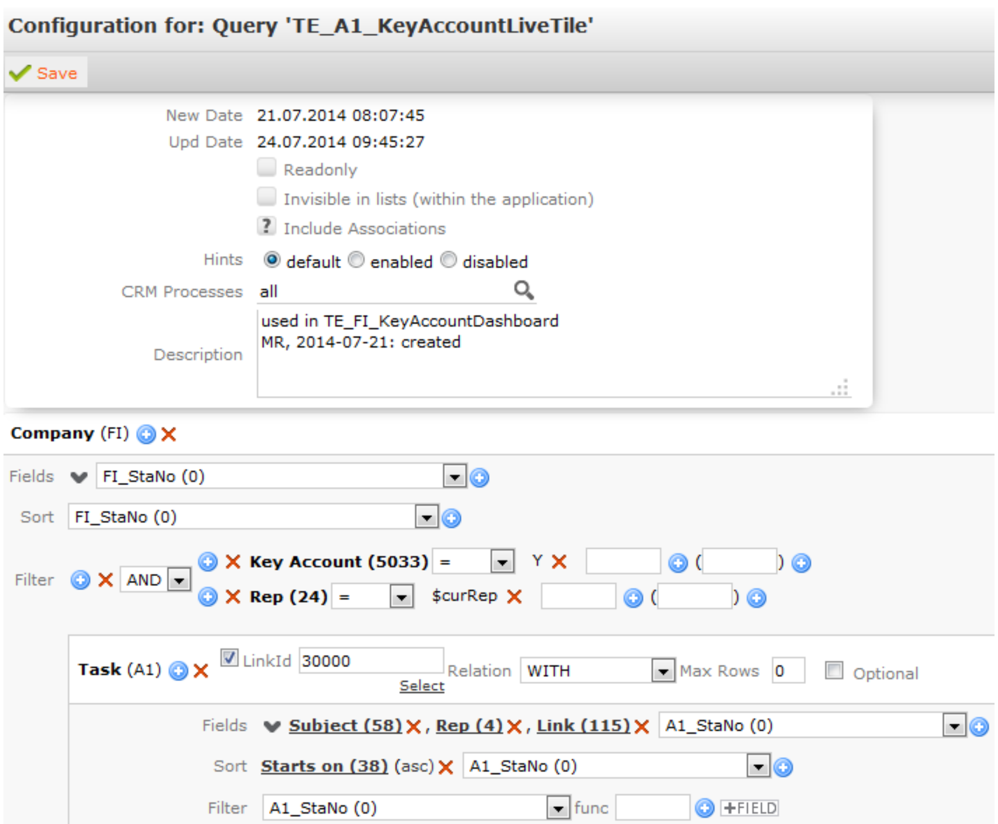
Form: 'TE_FI_KeyAccountDashboard'

Since every widget on the form needs to draw its shown records from the root FI but also from its corporate relationship records (PB) the implementation is a little bit more complex than most form-widgets.

The Livetiles (and the Timeline) at the top of the dashboard make all use of the linkid 30000 while selecting records which means they query records from the root-fi but also from its children (up to 10 relationship levels).

An LiveTile configuration looks like this (note the binding to the root-FI in the left image and the linkid in the right image):

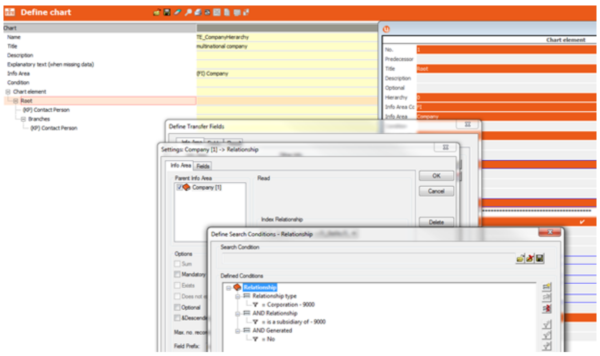
```
"liveTile2": {
  "type": "LiveTile",
  "options": {
    "provider": {
      "type": "records",
      "options": { "queryName": "TE_A1_KeyAccountLiveTile", "tableCaptionName": "A1" }
    },
    "displayText": "TXT_TE_PORTAL_TABLE_CAPTION_42",
    "showSlider": false
  },
  "binding": [
    {
      "sourcePath": [ "#rootUid" ],
      "targetPath": [ "provider", "options", "link" ]
    }
  ],
```



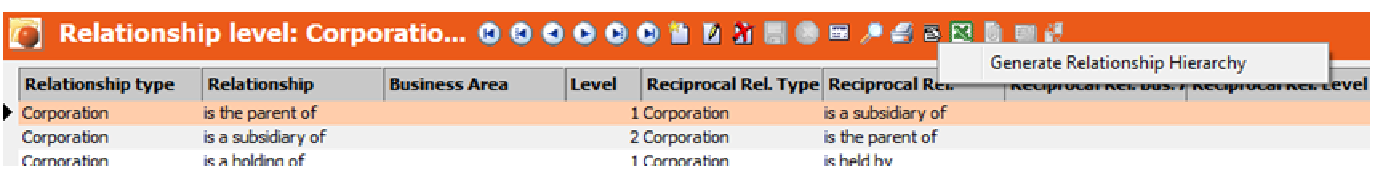
Additionally this Form holds a component to get the rootUid (the FI-Uid) through to the opportunity-matrix javascript. The eventhandler works like in the dashboard on the startpage, calling the same javascript function but with another xslt.

Relationship Records

The relationship (PB) node in the FI-Tree has been also modified to hide generated PB records (which are technically needed for the corporate relationship structure but do not hold additional information for the user). Also the button 'TE_FI_CompanyHierarchy' in the header of the FI-Expandmask which calls the win-chart 'TE_CompanyHierarchy' depends on the need for filtered pb-records. For this reason we modified the win-chart with the condition to only work with corporate pb-records too.



The above mentioned generated PB-records should be generated and regenerated everytime a new PB-record is created/modified or deleted. If - out of an unknown reason the dashboards show only entries of the root-FI and no records from its related FI's it is possible to start the PB-record generation by hand in the win-module through the infoarea 'Relationship levels':



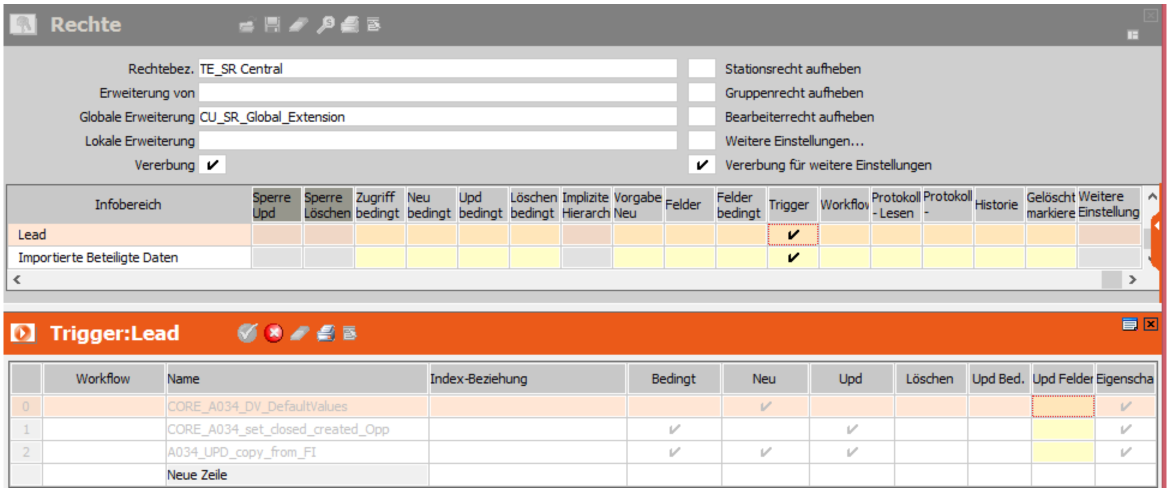
Lead Management(CRM 70000800)

Lead Management has been completely revised in this version and is now a separate info area (A034).

Right and Triggers

Three triggers have been defined:

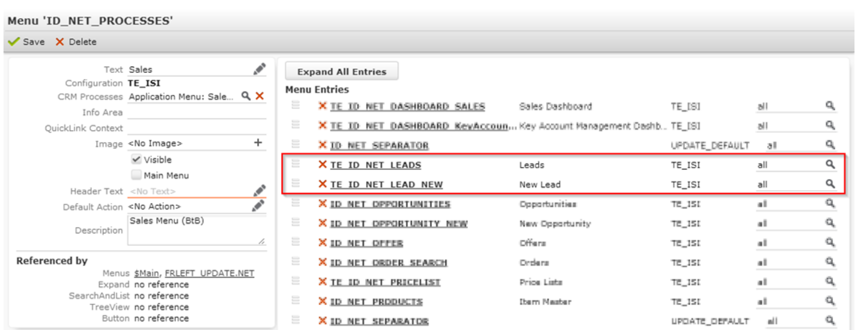
- CORE_A034_DV_DefaultValues
- CORE_A034_set_closed_created_Opp: This trigger sets the status to „Closed – Opportunity created" if an opportunity has been linked to the lead (when the lead is updated)
- A034_UPD_copy_from_FI: This trigger updates the A034 record if the linked FI has been updated.

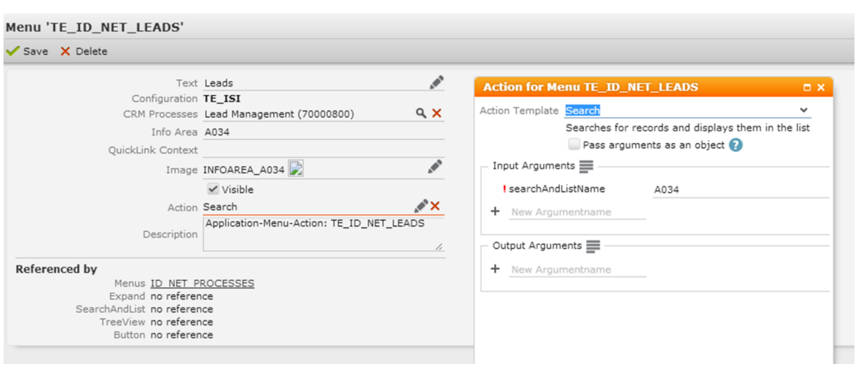


Designer Configuration

Application Menu

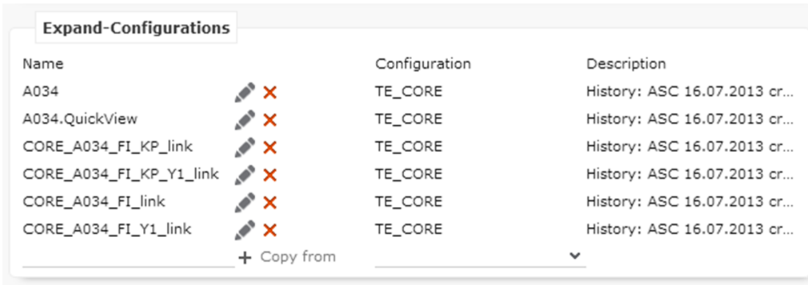
Two new menu entries have been added to the Sales menu:





Expand, Field and Header Groups

The following expand configurations have been added:



Expand-Configurations

Name	Configuration	Description
A034	TE_CORE	History: ASC 16.07.2013 cr...
A034.QuickView	TE_CORE	History: ASC 16.07.2013 cr...
CORE_A034_FI_KP_link	TE_CORE	History: ASC 16.07.2013 cr...
CORE_A034_FI_KP_Y1_link	TE_CORE	History: ASC 16.07.2013 cr...
CORE_A034_FI_link	TE_CORE	History: ASC 16.07.2013 cr...
CORE_A034_FI_Y1_link	TE_CORE	History: ASC 16.07.2013 cr...

+ Copy from

- The ‚A034‘ expand configuration is only called if there is no company linked to the lead
- The ‘CORE_A034_FI_link’ expand configuration is called if there is only a company linked to the lead (opened in the company tree)
- The ‘CORE_A034_FI_KP_link’ expand configuration is called if there is a company and a person linked to the lead (opened in the company tree)
- The ‘CORE_A034_FI_Y1_link’ expand configuration is called if there is a company and an opportunity linked to the lead (opened in the company tree)
- The ‘CORE_A034_FI_KP_Y1_link’ expand configuration is called if there is a company, a person and an opportunity linked to the lead (opened in the company tree)

Buttons

Six buttons have been configured:

- CORE_A034_create_FI_KP: only used in ‚A034‘ header expand, calls the process to create a new company and a new person
- CORE_A034_create_KP: only used in the ‘CORE_A034_FI_link’ and ‘CORE_A034_FI_Y1_link’ headers, calls the process to create a new person
- CORE_A034_create_Y1: only used in the ‘CORE_A034_FI_link’ and ‘CORE_A034_FI_KP_link’ headers to create a new opportunity
- CORE_A034_new: used to create a new lead record, calls the 'CORE_A034_open_in_Tree_or_Expand' process after the creation to determine if the record is opened in expanded or the company tree view.
- CORE_A034_quick_new: is used for serial entry of the lead record, calls the 'CORE_A034_quick_add' form, after saving the record, the action calls the same action again for continues lead entry
- CORE_A034_quick_new_finished: returns to the lead search, is used in the header for the ‘CORE_A034_quick_add’ serial entry

Actions

There are two context menu actions:

- CORE_A_A034_Open: Is used as gotoAfterSave argument in the 'CORE_A034_new' button and the 'TE_ID_NET_LEAD_NEW' application menu action to determine if the record is opened in expanded view or company tree view after saving. Is also used in the Search&List A034.
- CORE_A_A034_quick_new: is used to show the form for the serial entry

Serial Entry Form

The form consist of an Expand View and a List View to show the recently created lead records.

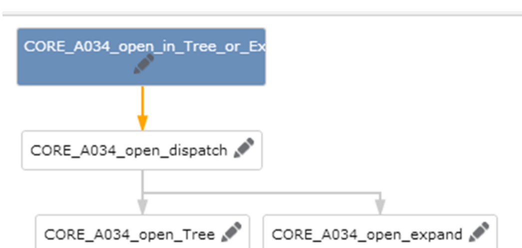
The form is called from the button in the 'Serial-Entry' of the leads search:

The button calls the CORE_A_A034_quick_new" action which opens the "CORE_A034_quick_add" form.

After saving, the event onSave calls the action again and opens the same form again.

Process Open Lead

The "CORE_A034_open_in_Tree_or_Expand" process is called everytime a lead record is opened in a Search&List or after the record is saved.



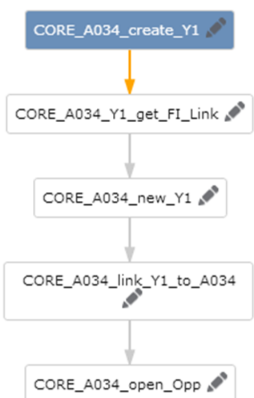
- The lead from the input message is stored in the process storage in the first step and the serial number of the linked company is stored in the process storage.
- In the initial "CORE_A034_open_dispatch" step the variable with the serial number of the FI link is checked Whether it is filled. If the variable is filled (i.e. there is a linked FI record), the open the record in the FI tree. If the variable is empty (i.e. there is no FI link) open the lead record in normal expand view.

Process Create New FI/KP

- The following things are carried out in the entry step of the process:
  - The lead record from where the process was started is written to the process storage
  - From the started lead record, all person-related fields are written to the process storage (combined into two variables) to check later if those fields contain data.
  - The person and company serial number is written to the process storage (to check if a company or person is linked to the lead record)
  - Company and person record variables are defined (but not filled)
  - The ‘needKP’ input argument is written to the process storage. This variable determines if a KP record needs to be created (process is started using the ‘create Person’ button in the FI tree) or if a KP record does not need to be created (if the process was started using the ‘create Company/Person’ button on the Lead Expand mask and no KP fields are filled)
- In the initial step of the process, the filink variable is checked if there is a fi linked to the lead record. If a FI is linked to the record, then the record is written into the FI process variable. If there is no linked FI, then a new FI will be created, linked to the lead record and written into the process storage.

- The needKP variable is checked after these steps.
  - If the variable contains ‘true’, then a new KP record will be created (as the process was started from the ‘create Person’ Button).
  - If the variable contains ‘false’ and the KP-specific fields on the lead record are filled, then a new KP record will be created.
  - If the variable contains ‘false’ and no KP-specific fields are filled, then you are directed to the descision page.
- On the descision page you can do one of the following:
  - Create a new opportunity for the lead
  - Go to the created company
  - Or go to the lead record

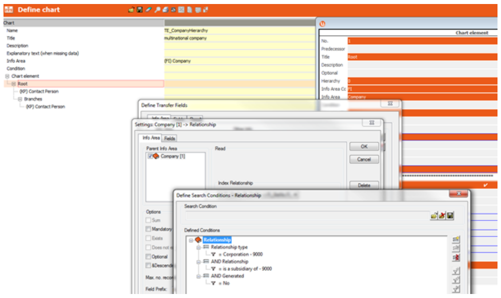
Process Create New Opportunity



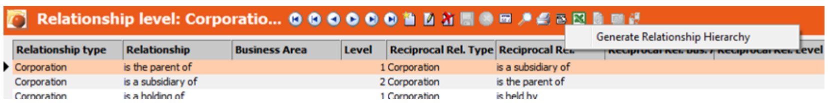
- The lead record is saved to the process storage in the first step
- The linked FI record from the lead is written to the process storage in the next steps, a new Y1 record is created (linked to the FI record which was obtained in the step before), then the new Y1 record is linked to the lead record and the new opportunity is opened.

Relationship Records

The relationship (PB) node in the FI-Tree has been also modified to hide generated PB records (which are technically needed for the corporate relationship structure but do not hold additional information for the user). Also the button 'TE_FI_CompanyHierarchy' in the header of the FI-Expandmask which calls the win-chart 'TE_CompanyHierarchy' depends on the need for filtered pb-records. For this reason we modified the win-chart with the condition to only work with corporate pb-records too.

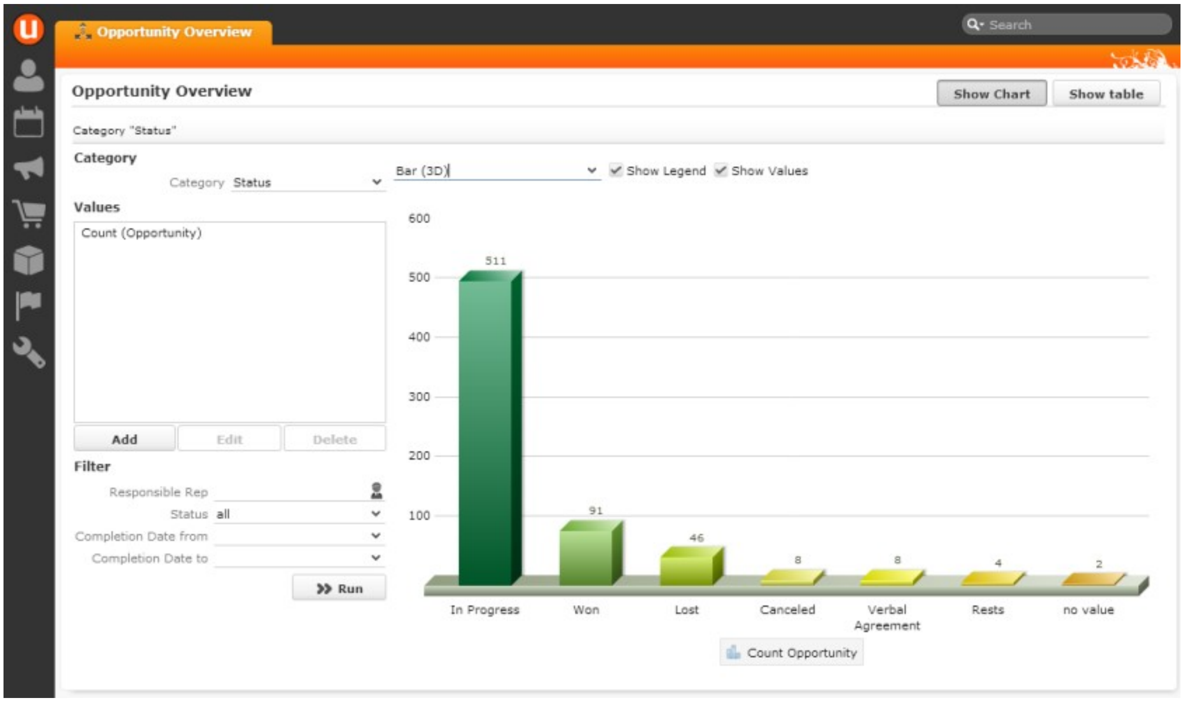


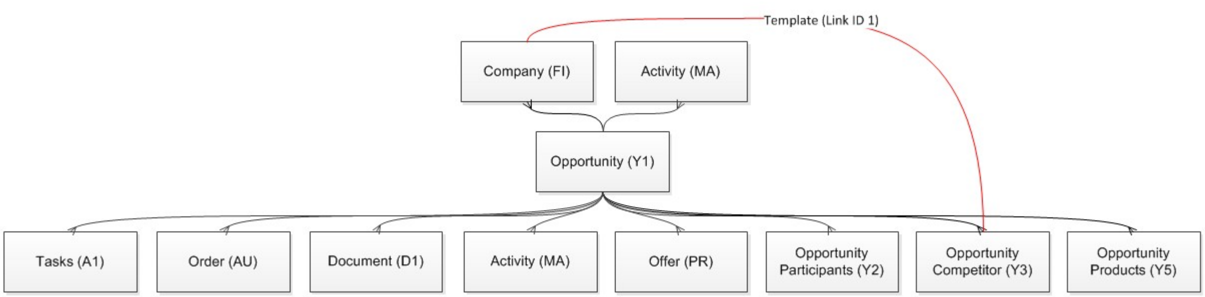
The above mentioned generated PB-records should be generated and regenerated everytime a new PB-record is created/modified or deleted. If - out of an unknown reason the dashboards show only entries of the root-FI and no records from its related FI's it is possible to start the PB-record generation by hand in the win-module through the infoarea 'Relationship levels':



Opportunity Management(CRM 60000020)

Learn how to forecast and process business opportunity.



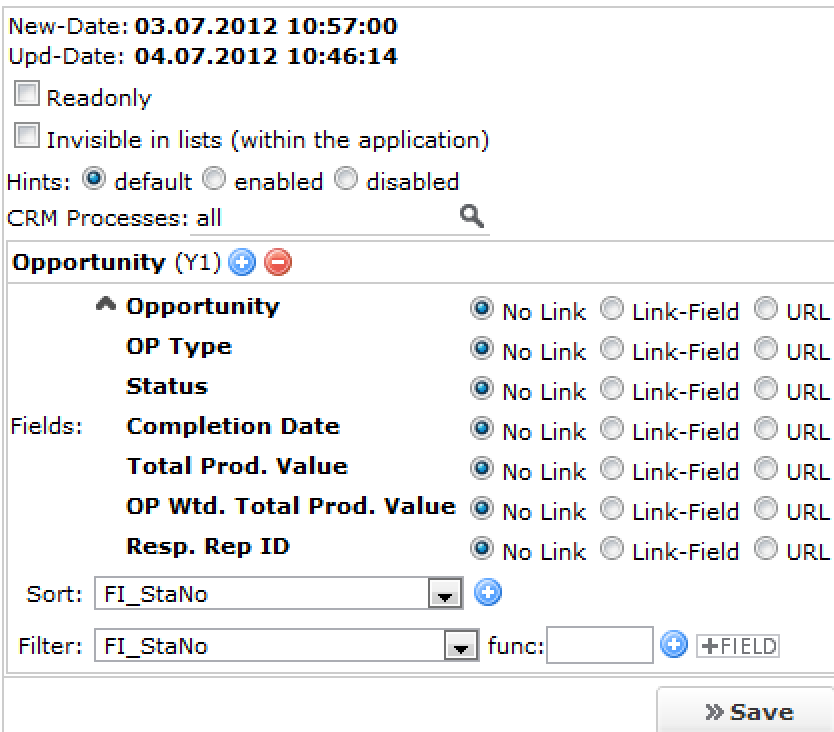


The opportunity overview can be found in the “Queries & Analyses” menu. You can switch between table view and chart view. It is possible to set additional filters. It is possible to drill-down or drill–up the specific data by clicking on bars in the chart or records in the table view.

Opportunity Forecast

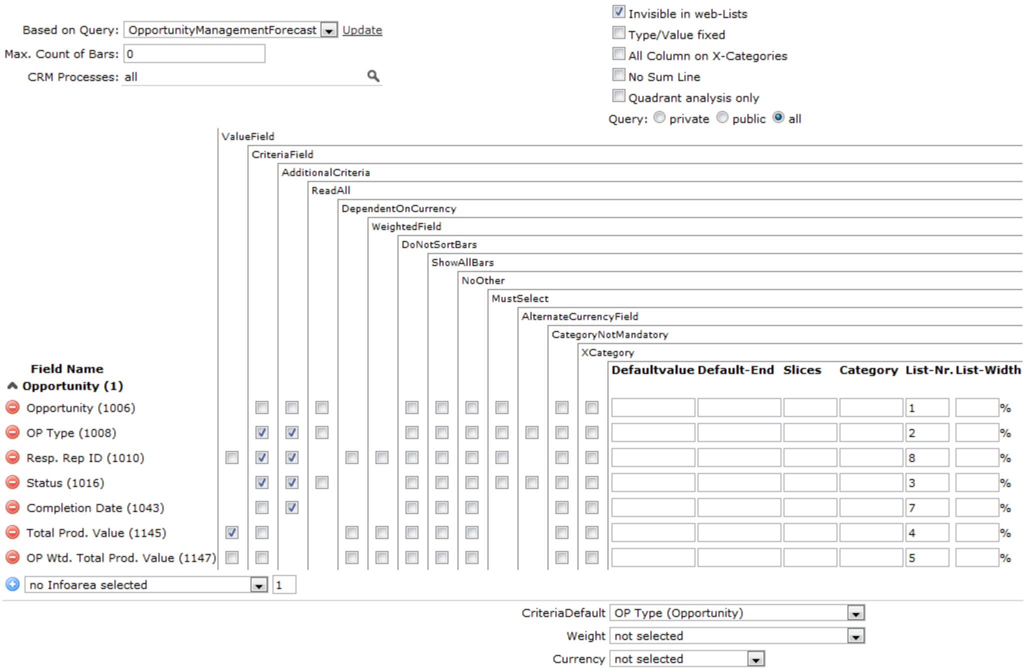
Learn about the configurations for opportunity forecast.

Query–“OpportunityManagementForecast”

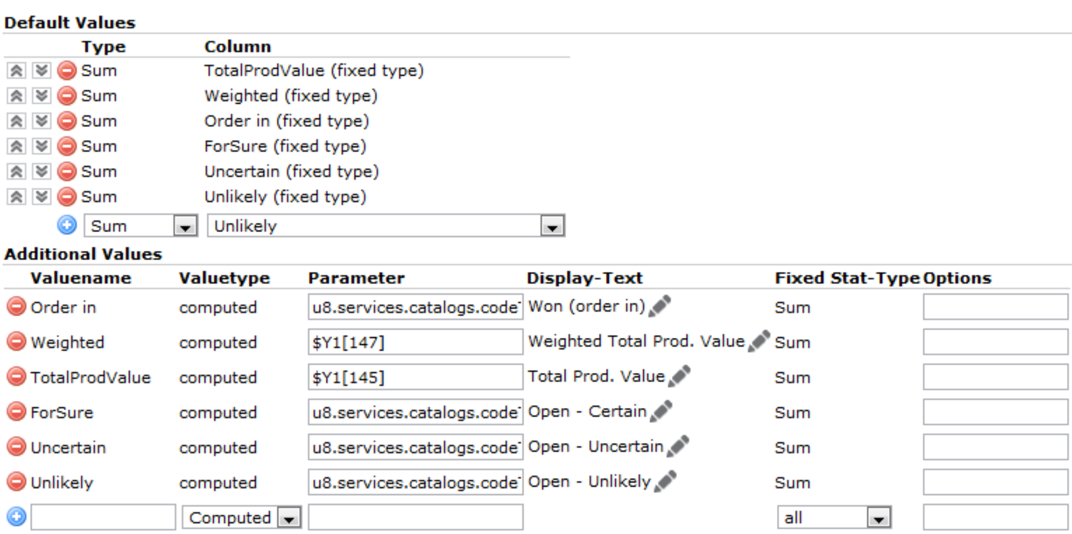


The “OpportunityManagementForecast” query to select all fields which are needed. The functionalities and the procedures in u8 and u7 are identical.

Analyses – “OpportunityForecast”



The analysis which offers the data displayed in the list view and chart view. You have to specify the query that the analysis is based on. The “Readonly in update.web” and “Invisible in web-Lists” fields are checked. “Total Prod. Value(1145)” is the value field, “OP Type”, “Resp.Rep ID” and “Status” are criteria fields.



Additional Values – Parameters:

- **Order in**
  `u8.services.catalogs.codeToExternalKey(196, $Y1[16])=='10001_196_2'?$Y1[145]:0`

- **Weighted**
  `$Y1[147]`

- **TotalProdValue**
  `$Y1[145]`

- **ForSure**
  `u8.services.catalogs.codeToExternalKey(196,$Y1[16])!='10001_196_2'?`
  `(u8.services.catalogs.codeToExternalKey(5023,$Y1[5024])=='10001_5023_3'?$Y1[145]:0):0`

- **Uncertain**
  `u8.services.catalogs.codeToExternalKey(196,$Y1[16])!='10001_196_2'?`
  `(u8.services.catalogs.codeToExternalKey(5023,$Y1[5024])=='10001_5023_2'?$Y1[145]:0):0`

- **Unlikely**
  `u8.services.catalogs.codeToExternalKey(196,$Y1[16])!='10001_196_2'?`
  `(u8.services.catalogs.codeToExternalKey(5023,$Y1[5024])=='10001_5023_1'?$Y1[145]:0):0`

JS – Functions:

```
(function()
{
    // Functions used in analyses.

    u8.TeBase.Analyses =
    {
        catalogCodeToExternalKey: function(catalogNo, code)
        {
            return u8.services.catalogs.codeToExternalKey(catalogNo, code);
        }

    };

})();
```

File: analyses.js [\\uprvtempapp03\DEVELOPMENT\base\web\web\scripts\te.base]

Namespace: u8.Crm
Assembly: update.Web.Scripts (in update.Web.Scripts.dll) Version: 8.0.1713.40097 (8.0.1713.40097)

Syntax

C#

```
public string codeToExternalKey(
        OneOf<Schema.FieldSchema, int> catalog,
        int code,
        int parentCode
)
```

Parameters

catalog
Type: **OneOf**(Schema.FieldSchema, Int32)
The field schema of a catalog field or a catalog no.

code
Type: System.Int32
The catalog code to be converted.

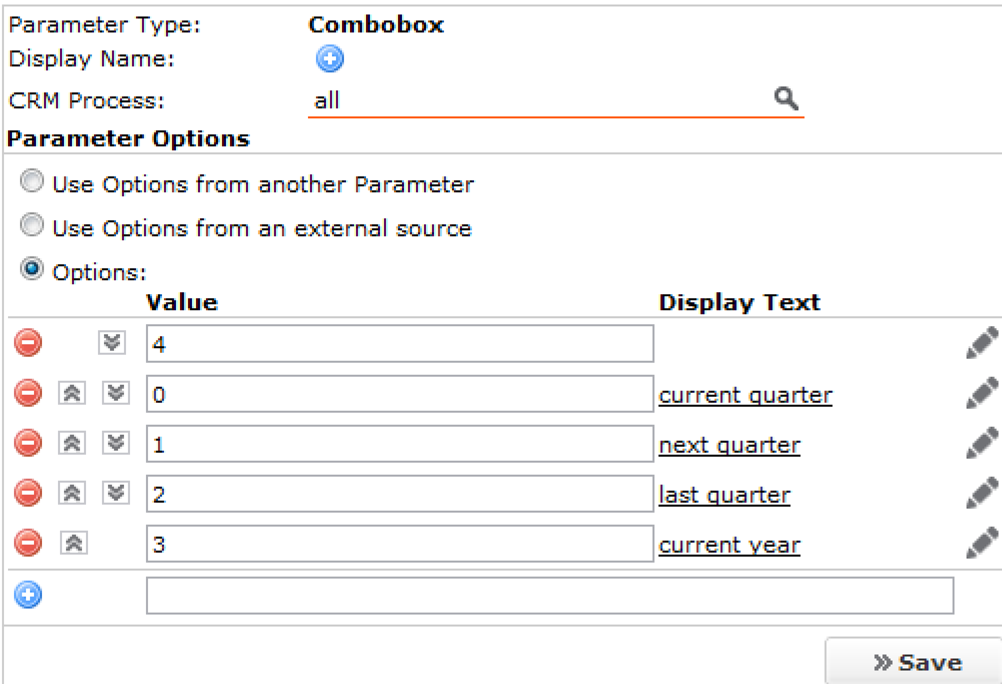
parentCode
Type: System.Int32
An optional parent catalog code for hierarchical catalogs.

Return Value

The external key or null if there is no external key, or undefined if the catalog does not exist.

The “catalogCodeToExternalKey” JS function to convert the catalog number to an external key. Basically you form the sum of special fields shown in the analyses. The following fields have been defined: “Order in”, “Weighted”, “TotalProdValue”, “ForSure”, “Uncertain” and “Unlikely”.

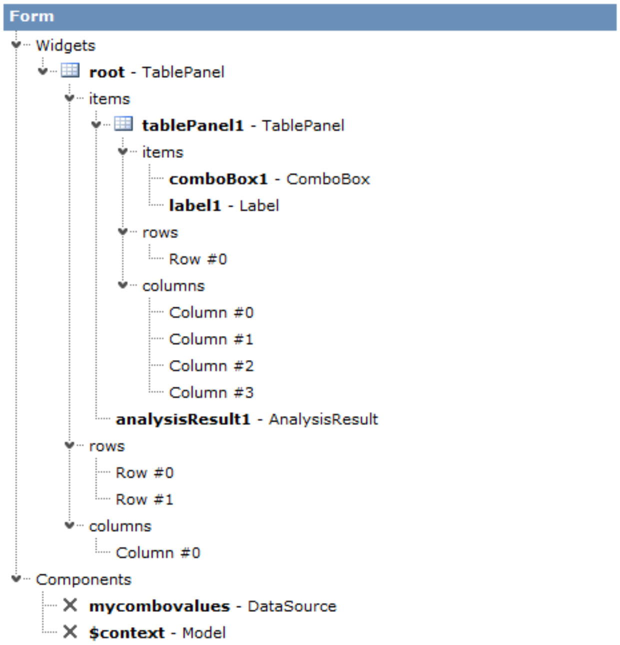
Web Configuration Parameter –“TE_Y1_ForecastTimespans”



A web config parameter has been created for the combo box values. You have to define a value and related text. The first value “4” determines that no value is selected. If the user selects this empty field in the combo box, then the two date fields will be cleared and no timeframe will be selected.

Form – “CORE_OpportunityManagement_Forecast”

Page layout:



Data binding:

The combo box values depend on the “TE_Y1_ForecastTimespans” web config parameter. Create a “DataSource” component and define the “requests” option in order to create the data binding. With `WEBCONFIG;TE_Y1_ForecastTimespans`.

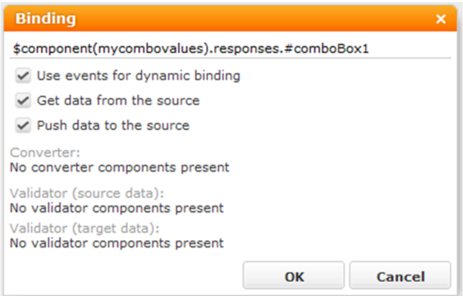
The combo box “combo_timeframe” knows the values of which web config parameter will be displayed.

Source view:

```
"components": {
  "mycombovalues": {
    "type": "DataSource",
    "options": {
      "requests": { "comboBox1": "WEBCONFIG;TE_Y1_ForecastTimespans" }
    }
  },
  "$context": { "type": "Model", "options": {} }
}
```

Furthermore, the combo box has to know which data binding component should be selected. Therefore choose the combo box in form designer and define the “items” attribute as follows:

```
$component(mycombovalues).responses.#comboBox1.
```

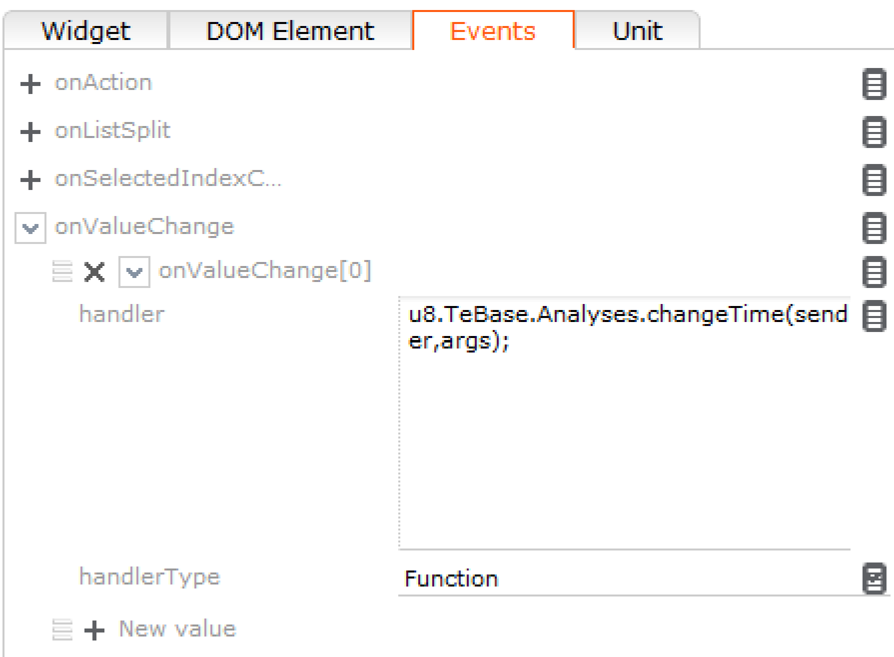


This is how the connection between the combo box and the “external” data source (web config parameter) is created.

Default – Chart view

Select the “AnalysisResult” widget in the form designer and set the parameter “view” to “chart” to enable chart view by default.

Combo Box – Change Timeframe



The combo box widget offers four kinds of events. To change the timeframe by selecting one of the combo box values you have to create an “onValueChange” event. There you have to define the “handlerType” as “Function” which means that code in the “handler” field will be executed as JavaScript code. A JavaScript function will be executed in the handler text field.

```
u8.TeBase.Analyses.changeTime(sender, args);
```

The u8 standard functionality offers two parameters: “sender” and “args”. “sender” is the u8 combo box object. “args” is also an object which will offer the JavaScript function the selected combo box value. The “args” object is composed as follows:

```
▼Object                    /BASE_DEV_WEB/scripts/$login.compiled.js:97
   index: 1
 ▶ item: Object
   key: "1"
   text: "next quarter"
 ▶ __proto__: Object
```

Here you can see that there is a key with the associated text.

```
getTimeFrame: function(akey)
{
    var currentDate = new Date();
    var currentMonth = currentDate.getMonth() + 1; //7
    var currentYear = currentDate.getFullYear();   //2012
    var currentQuarter = Math.ceil(currentMonth / 3); //3
    var dayone = 1;

    switch (akey) {
        case "0":
        { //current quarter
            monthFrom = currentQuarter * 3 - 2;
            monthTo = currentQuarter * 3;
            break;
        }
        case "1":
        { // next quarter
            if ((currentQuarter + 1) < 5) {
                monthFrom = currentQuarter * 3 + 1;
                monthTo = currentQuarter * 3 + 3;
            } else {
                monthFrom = 1;
                monthTo = 3;
                currentYear += 1;
            }
            break;
        }
        case "2":
        {  //last quarter
            if ((currentQuarter - 1) > 0) {
                monthFrom = currentQuarter * 3 - 5;
                monthTo = currentQuarter * 3 - 3;
            } else {
                monthFrom = 10;
                monthTo = 12;
                currentYear = currentYear - 1;
            }
            break;
        }
        case "3":
        { //current year
            monthFrom = 1;
            monthTo = 12;
            break;
        }
        case "4":
        { //current year
            // set the date values to empty
            $u(".AnalysisResult > .AnalysisSettingsEditor > .DateInput", "work")[0].setValue("");
            $u(".AnalysisResult > .AnalysisSettingsEditor > .DateInput", "work")[1].setValue("");

            // set the date
            $u(".AnalysisResult > .Header")[0]
            .attr({ parameters: { "Name": "Opportunity Forecast" } })
            .update({ caption: true });

            break;
        }
        default:
        { return;
        }
    }
```

The specific timeframes will be created in the “getTimeFrame” JS function.

```
//create a full date string for date from and date to
dayTo = new Date((new Date(currentYear, monthTo, 1)) - 1).getDate();
dateFrom = new Date(currentYear, monthFrom - 1, dayone);
dateTo = new Date(currentYear, monthTo - 1, dayTo);

if(akey!=4){
    // set the date values
    $u(".AnalysisResult > .AnalysisSettingsEditor > .DateInput", "work")[0].setValue(dateFrom);
    $u(".AnalysisResult > .AnalysisSettingsEditor > .DateInput", "work")[1].setValue(dateTo);

    // change the analysis header
    $u(".AnalysisResult > .Header")[0]
    .attr({ parameters: { "Name": "Opportunity Forecast for " +
        u8.services.typeConverter.dateToString(dateFrom) + " to " + u8.services.typeConverter.dateToString(dateTo)} })
    .update({ caption: true });
}

// execute the analysis with a simple click event on the execute button
$u(".AnalysisResult > .AnalysisSettingsEditor > .Button[command='Analysis/Execute']", "work")[0].click();
```

"dateFrom" creates the new date for the "Completion Date from" field. "dateTo" creates the new date for the "Completion Date to" field.

If the user does not select the "empty" value (4) from the drop-down box, then the following $u query functions will be executed:

```
$u(".AnalysisResult > .AnalysisSettingsEditor > .DateInput",
"work")[0].setValue(dateFrom);
```

```
$u(".AnalysisResult > .AnalysisSettingsEditor > .DateInput",
"work")[1].setValue(dateTo);
```

With $u("…") you select one of the date fields in the analysis which have to be filled with the new date. Depending on "[0]" or "[1]" you can switch between "Completion Date from" and "Completion Date to". Use ".setValue" (equal to jQuery ".value") to set the new date value.

```
$u(".AnalysisResult > .Header")[0].attr({ parameters: { "Name": "Opportunity
Forecast for
```

```
"+u8.services.typeConverter.dateToString(dateFrom) + "to" +
u8.services.typeConverter.dateToString(dateTo)} })
.update({ caption: true });
```

With $u(".AnalysisResult > .Header")[0] you can select the header used in the created form. With ".attr" you can define different attributes such as new name. The old string will be overwritten each time the "getTimeFrame" function is executed.

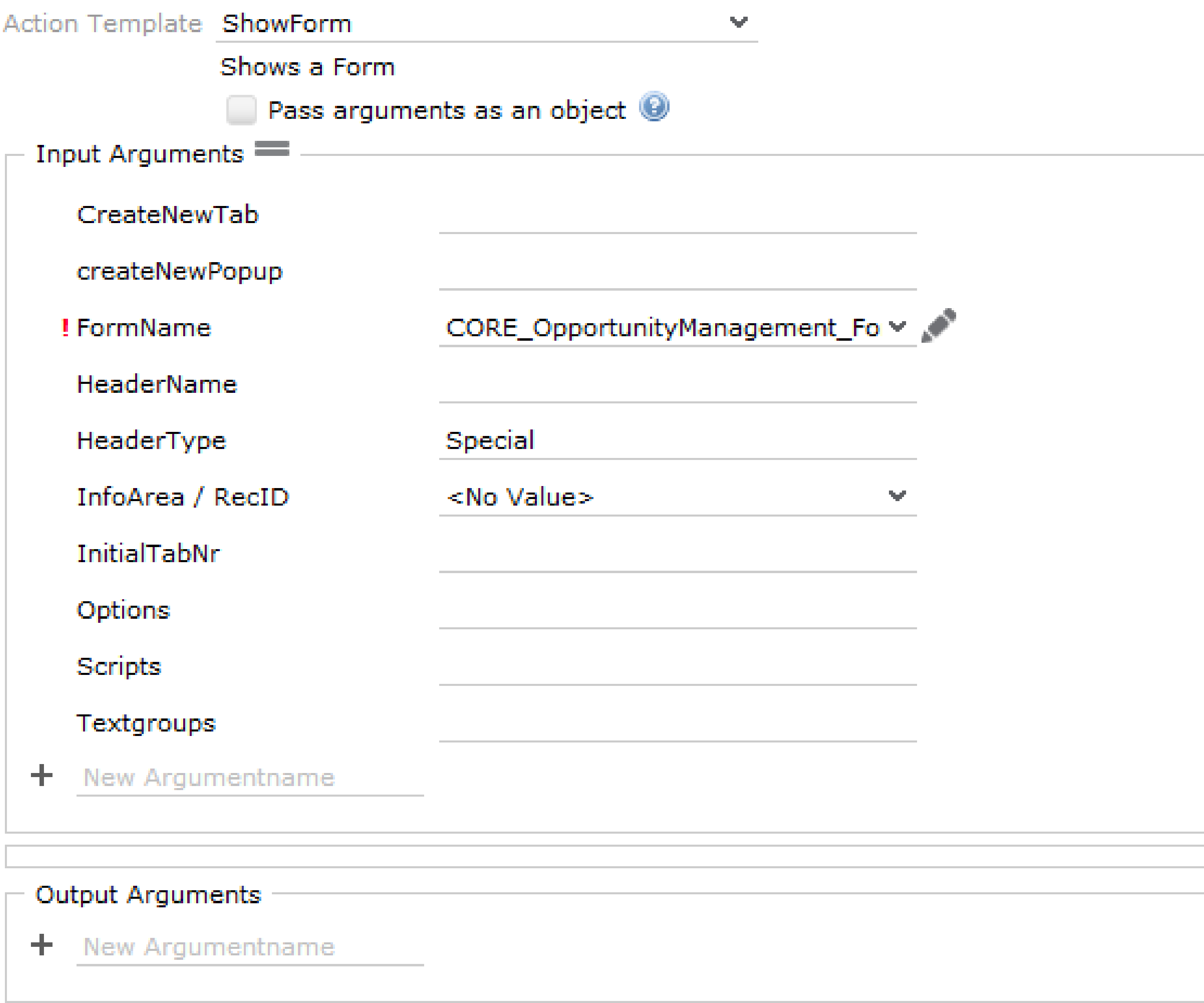
```
$u(".AnalysisResult > .AnalysisSettingsEditor >
.Button[command='Analysis/Execute']",
"work")[0].click();
```

Moreover, a click event will be added to the execute button so that the analysis will be executed automatically.

Due to the fact that the "getTimeFrame" JS function will be executed each time the user changes the value of the drop-down box (onValueChange – event), all dependent areas like page header, two date fields, and chart will change automatically after clicking on a new value in the drop-down box.

Menu action – "CORE_ID_NET_ForecastWithForm"

Action – ShowForm:

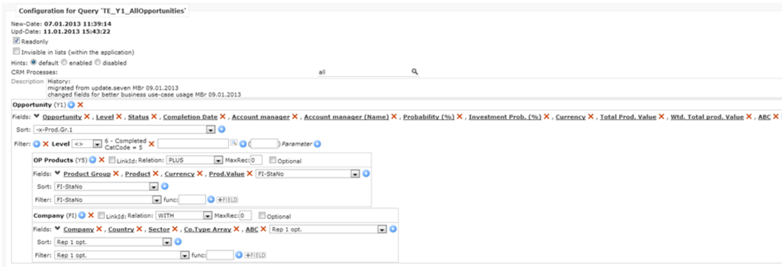


Opportunity Sales Funnel

The opportunity sales funnel provides an analysis of the sum of all prod. values of the opportunities in the various levels.

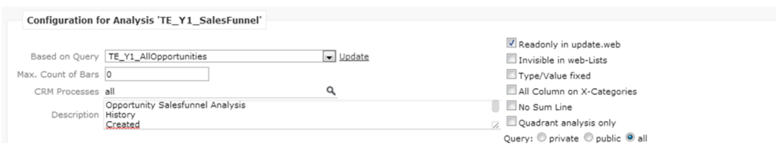
It consists of four elements and can be called directly from the “Queries and Analysis” application menu.

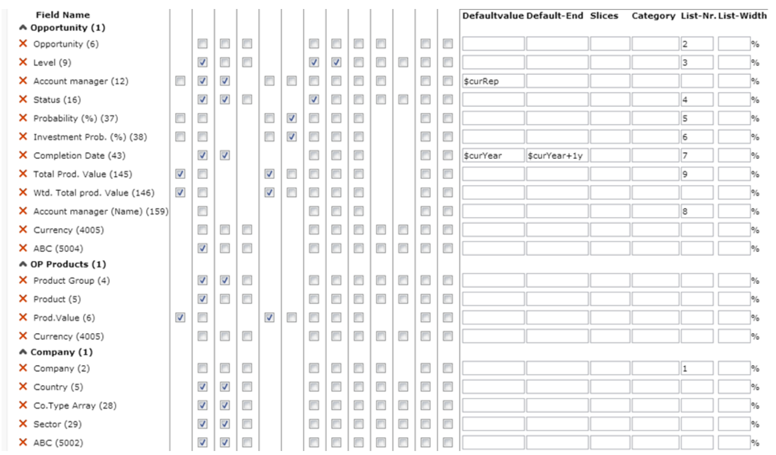
Query: TE_Y1_AllOpportunities



The query provides all necessary fields for the sales funnel including additional fields from opportunity products and the linked company record.

Analysis: TE_Y1_SalesFunnel



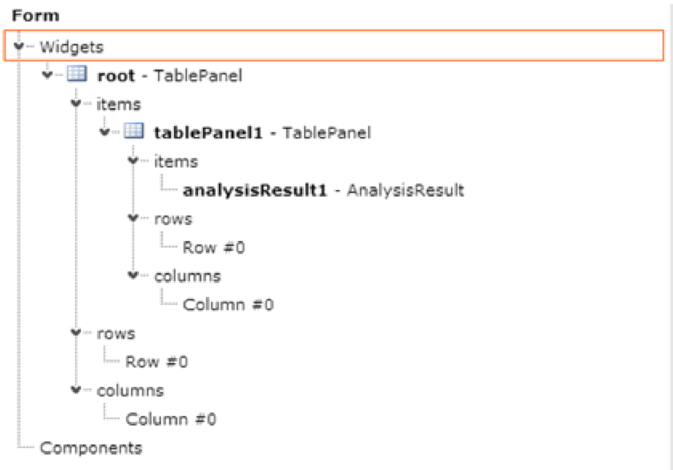


The sum of the Total Prod. Value as well as the Sum of Wtd. Total prod. Value and the Average Total Prod. Value are displayed. Several fields from the opportunity (9,12,16,43) as well as opportunity product (4,5) and company (5,28,29,5002) are selected in order to provide additional drill-down possibilities. Additional fields are selected to act as filters: Opportunity (12,16,43), Opp. Product (4) and Company (5,28,29,5002). The current rep is preselected and the timeframe of the opportunity is set to the current year by default. The sorting of results is disabled for the “Level” and the “Status” of the opportunity.

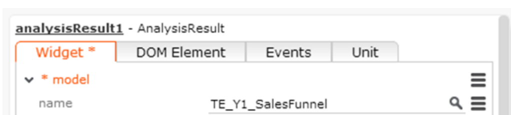
Form: TE_OpportunitySalesFunnel

The form provides the sales funnel with default parameters in order to show the analysis as a default funnel:

Page layout:

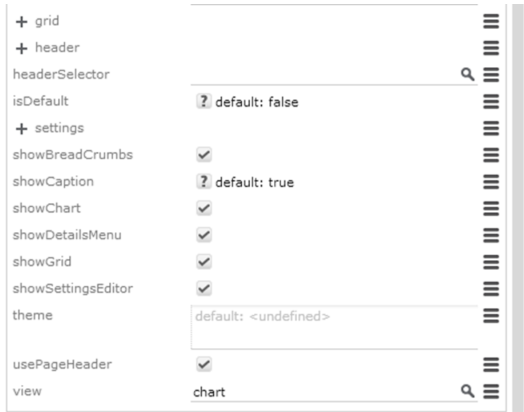


analysisResult1 Configuration:



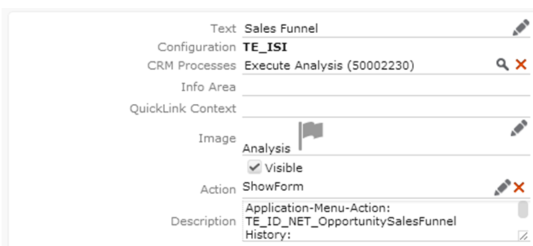
The above documented analysis is called.

“Funnel” is selected as a chart and fixed chart type. The selector to change the default chart type is hidden.



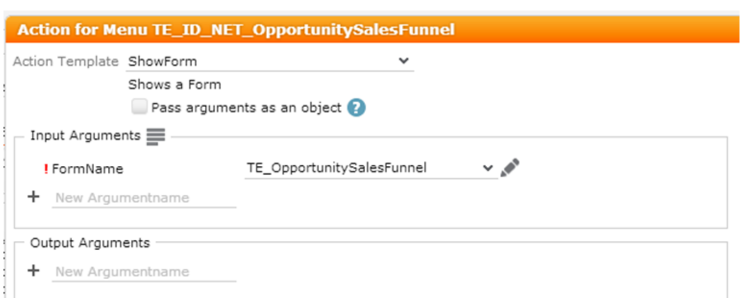
The “chart” view is selected as a default view, the details menu as well as the possibility to switch to “grid” view as available.

Application Menu Action: TE_ID_NET_OpportunitySalesFunnel



This menu entry is called via the ID_NET_QUERIES_AND_STATISTICS application menu and is linked to the “execute analysis” process.

The “ShowForm” action calls the above mentioned form:

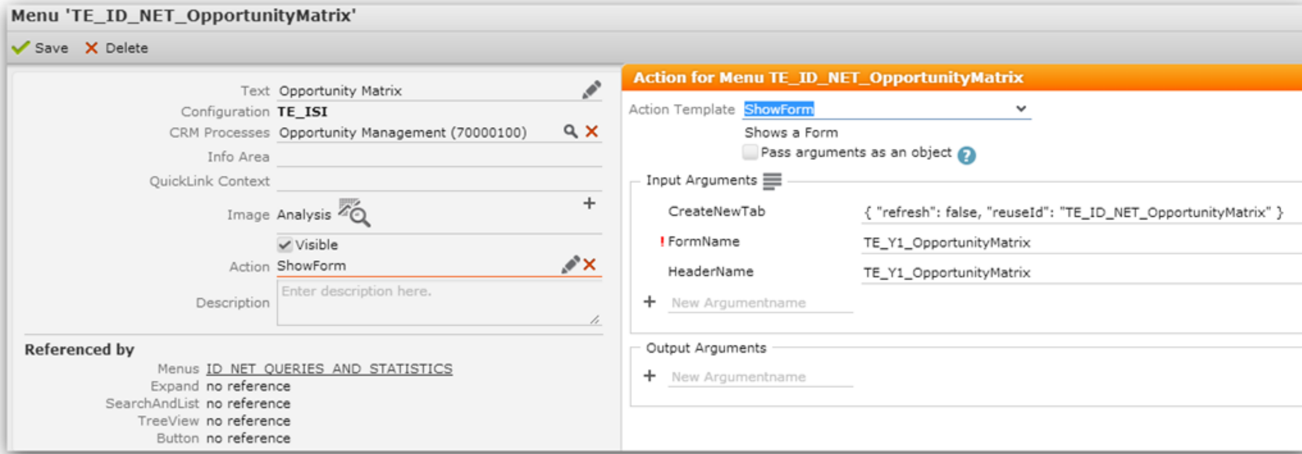


No additional configuration or settings are needed.

Opportunity Matrix

The opportunity matrix is a bubble chart, which can be opened via the application menu.

Used menu action: “TE_ID_NET_OpportunityMatrix”

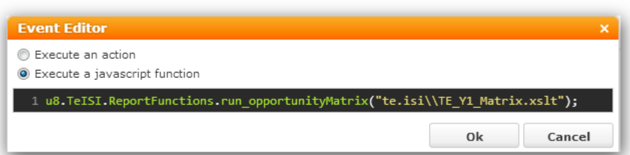


The form “TE_Y1_OpportunityMatrix” contains the following:

- some widgets for filter values
- a frame where the fusion chart is rendered
- a list of opportunities which displays the same result as the chart
- a button to run the analysis

The whole report is based on the “TE_Y1_OppMatrixDetails” query

The “onCreate” event of the form is the same as the “onClick” event of the button. In every case the following JS function is called, which you can find in the “\web\scripts\te.isi\isireportfunctions.js” file.



The JS function executes the query and transforms the result to a fusion chart analysis using the “TE_Y1_Matrix.xslt” file which is located in the following folder: \web\data\reports\te.isi\xslt.

Furthermore, the function updates the list which is displayed below the chart with the correct filter values.

Attention: The parameters of the query have to be in the same order as they are set in the javascript function!!

Opportunity Process

Learn about the Opportunity Process.

Used Headers

Phase	Name	Description
1	TE_Y1_Level1_Process_OppMgmt	Headergroup used in Phase 1 Identification.
2-3	TE_Y1_Level2-3_Process_OppMgmt	Headergroup used in Phase 2 Qualification and Phase 3 Cover buying center.
4-6	TE_Y1_Level4-5_Process_OppMgmt	Headergroup used in Phase 4 offer, Phase 5 and Phase 6

Used Field Groups

Phase	Name	Description
New creation	TE_Y1_Level0	Mask for creating a new Opportunity
1	TE_Y1_Level1	Mask used in Phase 1
2-6	TE_Y1_Level2	Mask used in Phase 2-6

Used Process Asks

Phase	Name	Description
6	TE_Y1_OppMgmt_ChooseWinningCompetitor	Used to select a competitor

Used Process Steps

Name	Description
TE_Y1_OppMgmt_AddMa	ExpandNew “TE_Ma_AddToY1” – For creating a new activity
TE_Y1_OppMgmt_AddRelatedData	ExpandNew generic. Infoarea dependent
TE_Y1_OppMgmt_CheckLevel	Checks the level and executes the phase specific trigger for setting the right level
TE_Y1_OppMgmt_ChooseWinningCompetitor	Process Ask Page for choosing the winning competitor.
TE_Y1_OppMgmt_CreateDocument	Calls JavaScriptWithCallback for creating new document.
TE_Y1_OppMgmt_CreateDocumentLink	Calls JavaScriptWithCallback for creating new document link.
TE_Y1_OppMgmt_CreateFI	ExpandNew “TE_FI_OppMgmt_Y1” -For creating a new company
TE_Y1_OppMgmt_CreateY1	ExpandNew “TE_Y1_Level0_Process_OppMgmt” – For creating a new Opportunity.
TE_Y1_OppMgmt_EditD1	Expand “TE_D1_AddToY1” – Edit Documents
TE_Y1_OppMgmt_EditRelatedData	Expand generic. Infoarea dependent –For editing related data
TE_Y1_OppMgmt_EditY1	Expand generic. For editing opportunity.

Name	Description
TE_Y1_OppMgmt_Entrance	Initial step of the opportunity process.
TE_Y1_OppMgmt_ProcessStateOverview	Process Ask Page (Mainpage in the process. User can add, or edit data only from this page)
TE_Y1_OppMgmt_SelectDocument	Search “TE_D1_AddToY1” Search & List through documents
TE_Y1_OppMgmt_SelectFI	Search “TE_FI_OppMgmt_Y1” Search & List through companies
TE_Y1_OppMgmt_SetPhase1	Calls JavaScript, which sets the opportunity level to 1.(Identification) ONLY USED in case of a QuickOpportunity (if the phases are clickable)
TE_Y1_OppMgmt_SetPhase2	Calls JavaScript, which sets the opportunity level to2.(Qualification) ONLY USED in case of a QuickOpportunity (if the phases are clickable)
TE_Y1_OppMgmt_SetPhase3	Calls JavaScript, which sets the opportunity level to 3.(Cover buying center) ONLY USED in case of a QuickOpportunity (if the phases are clickable)
TE_Y1_OppMgmt_SetPhase4	Calls JavaScript, which sets the opportunity level to 4.(offer) ONLY USED in case of a QuickOpportunity (if the phases are clickable)
TE_Y1_OppMgmt_SetPhase5	Calls JavaScript, which sets the opportunity level to 5.(negotiation) ONLY USED in case of a QuickOpportunity (if the phases are clickable)
TE_Y1_OppMgmt_SetPhase6	Calls JavaScript, which sets the opportunity level to 6.(completed) ONLY USED in case of a QuickOpportunity (if the phases are clickable)

Name	Description
TE_Y1_OppMgmt_SetWinningCompetitor	Calls JavaScriptWithCallback, for setting the winning competitor.
TE_Y1_OppMgmt_StartOfferProcess	Calls the offer process “TE_PR_Offer-Mgmt”
TE_Y1_OppMgmt_AddExistingOrder	Calls a search and list with a fixed filter to select an order
TE_Y1_OppMgmt_AddExistingOrder_WF	Calls a workflow to link an existing order to the opportunity

Used Triggers

Name	Description
Y1_UPD_OppMgmt_SetLevel	Checks if conditions are complied with and sets opportunity level.
Y1_UPD_OppMgmt_SetOppToLost	Sets opportunity to Lost.
Y1_UPD_OppMgmt_SetOpportunity-ToWon	Sets opportunity to Won.
Y2_UPD_OppMgmt_SetCountFields	Counts all activities from offer and write it to opportunity and counts all contacts for opportunity participants that have the state set to “completed”.
Y1_UPD_OppMgmt_CheckCompletion-Date	Plausibility trigger

Used Workflows

Name	Description
TE_Y1_OppMgmt_CountMa_LinkToPR	Counts all activities from offer and write it to opportunity.
TE_Y1_OppMgmt_LinkOrder_ ToOpportunity	Links an existing order to the opportunity
TE_Y1_OppMgmt_SetOpportunityToLost	Sets the opportunity to lost, changes the status of a competitor or creates a new competitor with status “won against me”

Used Buttons

Name	Description
TE_Y1_OppMgmt_BackToOverview	Button to leave current Page and navigate back to “TE_Y1_OppMgmt_ProcessStateOverview”
TE_Y1_OppMgmt_NewFI	To create a new company in the opportunity process.

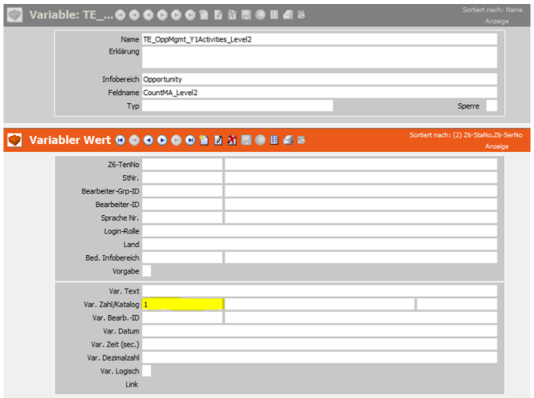
Used Variables

All variables with the “TE_OppMgmt” prefix belong to the opportunity process. The variables are used for defining the phase-specific requirements.

Phase	Name	Description	Default Value
2	TE_OppMgmt_Y1Participants_Level2	Count of opportunity participants Y2 from Y1 >= TE_OppMgmt_Y1Participants_Level2	1
2	TE_OppMgmt_Y1Activities_Level2	Count of activities from Y1 >= TE_OppMgmt_Y1Activities_Level2	1
3	TE_OppMgmt_Y1Evaluation_Level3	Estimate probability (Y1:6008) >= TE_OppMgmt_Y1Evaluation_Level3	10(%)

Phase	Name	Description	Default Value
3	TE_OppMgmt_Y1Competitor_Level3	Count of competitor (Y3) from Y1 >= TE_OppMgmt_Y1Competitor_Level3	1
3	TE_OppMgmt_Y5Product_Level3	Count of opp. Products from Y1 >= TE_OppMgmt_Y5Product_Level3	1
4	TE_OppMgmt_Y1Activities_Level4	Count of activities >= TE_OppMgmt_Y1Activities_Level4	1
4	TE_OppMgmt_Y1Participants_Level4	Count of participants from Y1 >= TE_OppMgmt_Y1Participants_Level4	1
4	TE_OppMgmt_Y1Participants_Decider_Level4	Count of participants (where role = “Decider”) from Y1 >= TE_OppMgmt_Y1Participants_Decider_Level4	1
5	TE_OppMgmt_Y1Offer_Level5	Count of offers(State=”Waiting for Decision”) from Y1 >= TE_OppMgmt_Y1Offer_Level5	1
5	TE_OppMgmt_Y1Activities_Level5	Count of activities (State=”Completed” and Link to PR with State=”Waiting for decision”) from Y1 >= TE_OppMgmt_Y1Activities_Level5	1

You have to enter your value in the yellow highlighted field to edit the default values of the variables.



Data Model Changes

The new fields are used for metric and condition checks.

Y1

Name	Description	Type
CountY2	Count of opportunity participants Y2 from Y1	int (4Byte)
CountMA	Count of activities MA from Y1	int (4Byte)
CountY3	Count of competitors	int (4Byte)
CountMA_LinktoPR	Count of activities with a link to an offer.	int (4Byte)
CountMA_StateCompleted	Count of activities with State= “Completed”	int (4Byte)
CountY2_Decider	Count of opportunity participants where role =”Decider”	int (4Byte)
CountPR_StateSent	Count of offers with state= “Waiting for decision“	int (4Byte)
CountY5	Count of opportunity products.	int (4Byte)

Used JavaScript

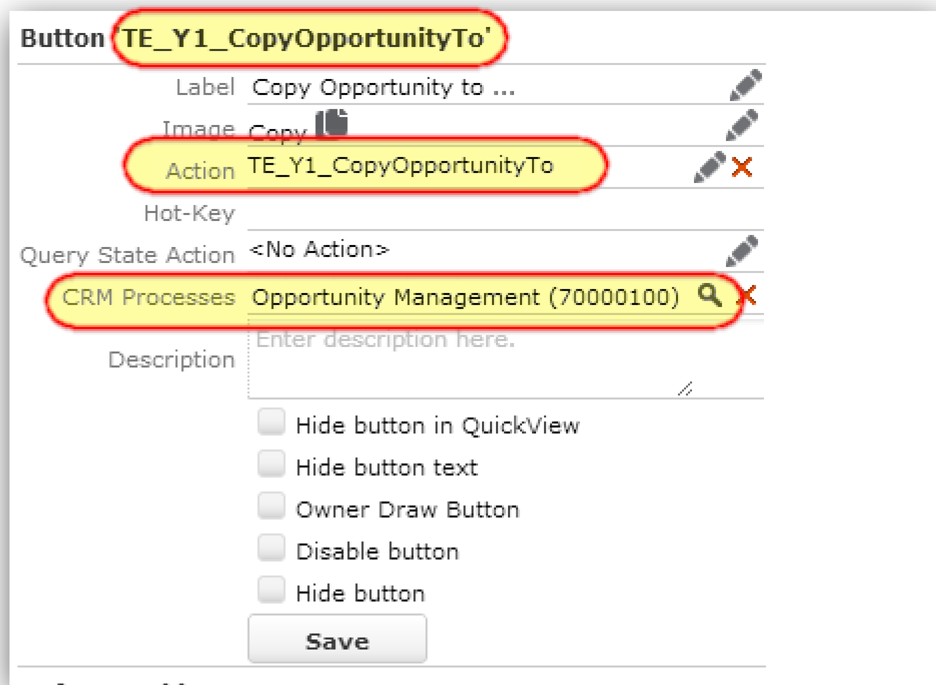
Filename: *TE_Y1_OppMgmt.js* \web\web\scripts\te.isi\processes

- Data provider
- Metric definition

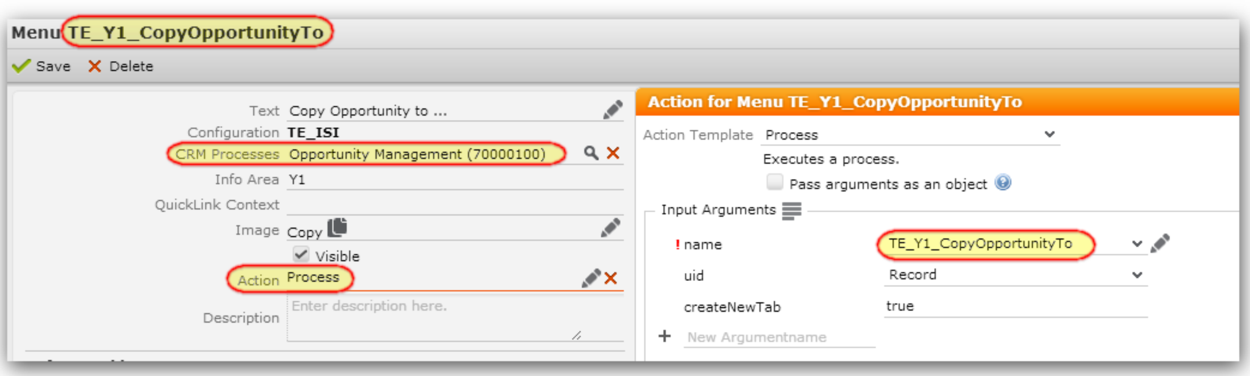
Copy Opportunity to

Learn about the new “TE_Y1_CopyOpportunityTo” button which references the “TE_Y1_CopyOpportunityTo” menu action.

New “TE_Y1_CopyOpportunityTo” button which references the “TE_Y1_CopyOpportunityTo” menu action



This action calls the “TE_Y1_CopyOpportunityTo” process



Used process steps:

- TE_Y1_CopyOpportunityTo_ShowProcAsk_ChooseTarget (initial step)
- TE_Y1_CopyOpportunityTo_SelectFI
- TE_Y1_CopyOpportunityTo_CallWorkflow
- TE_Y1_CopyOpportunityTo_ShowProcAsk_CopyAgain

Used process asks:

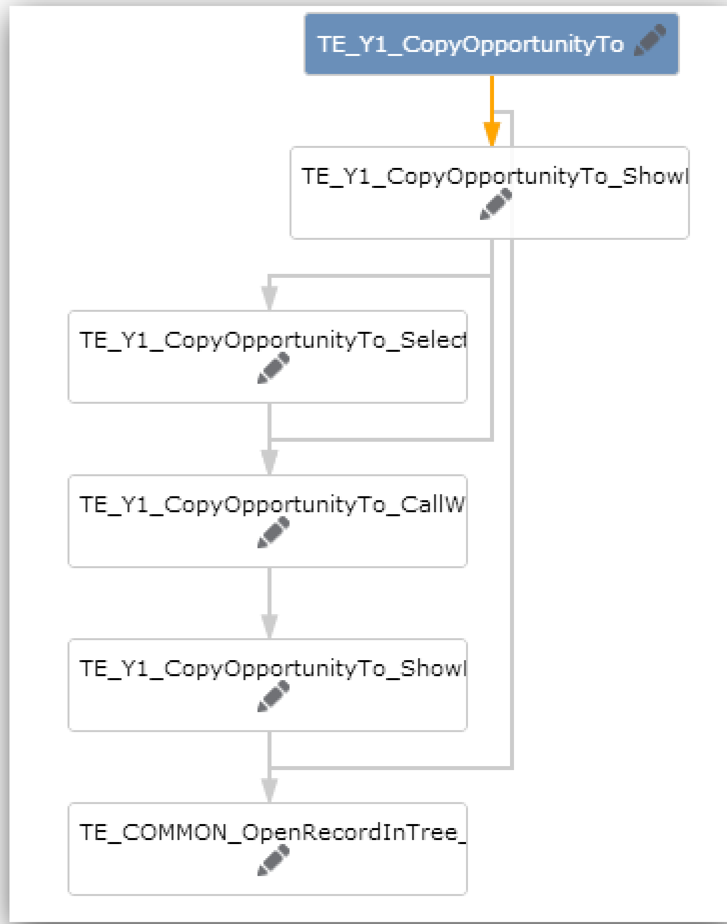
- TE_Y1_CopyOpportunityTo_ChooseTarget (prompts the user whether he/she want to copy the opportunity to the same or another company)
- TE_Y1_CopyOpportunityTo_CopyAgain (ask the user if he/she wants to copy the opportunity again to another target)

Used workflow:

TE_Opportunity Copy Opportunity

For a detailed description see the description field of the process steps.

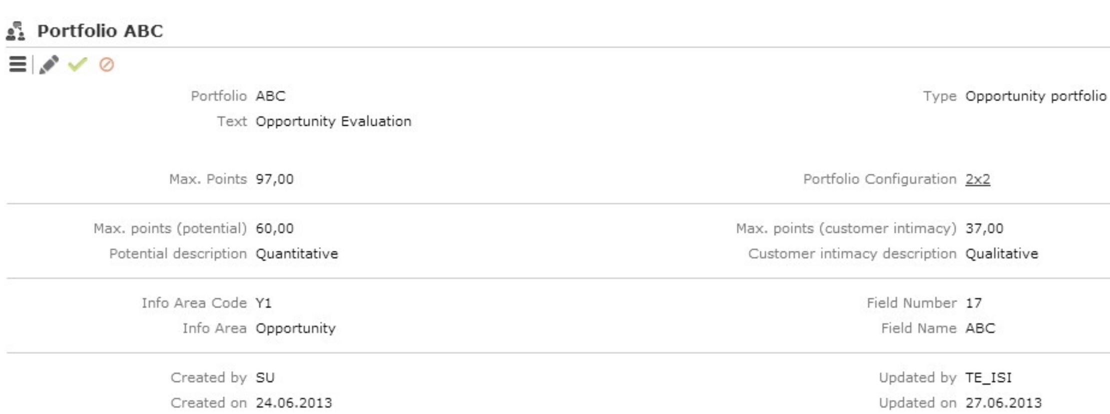
Process overview:



Opportunity Portfolio

Learn ato configure opportunity portfolio.

Configuration of Portfolio



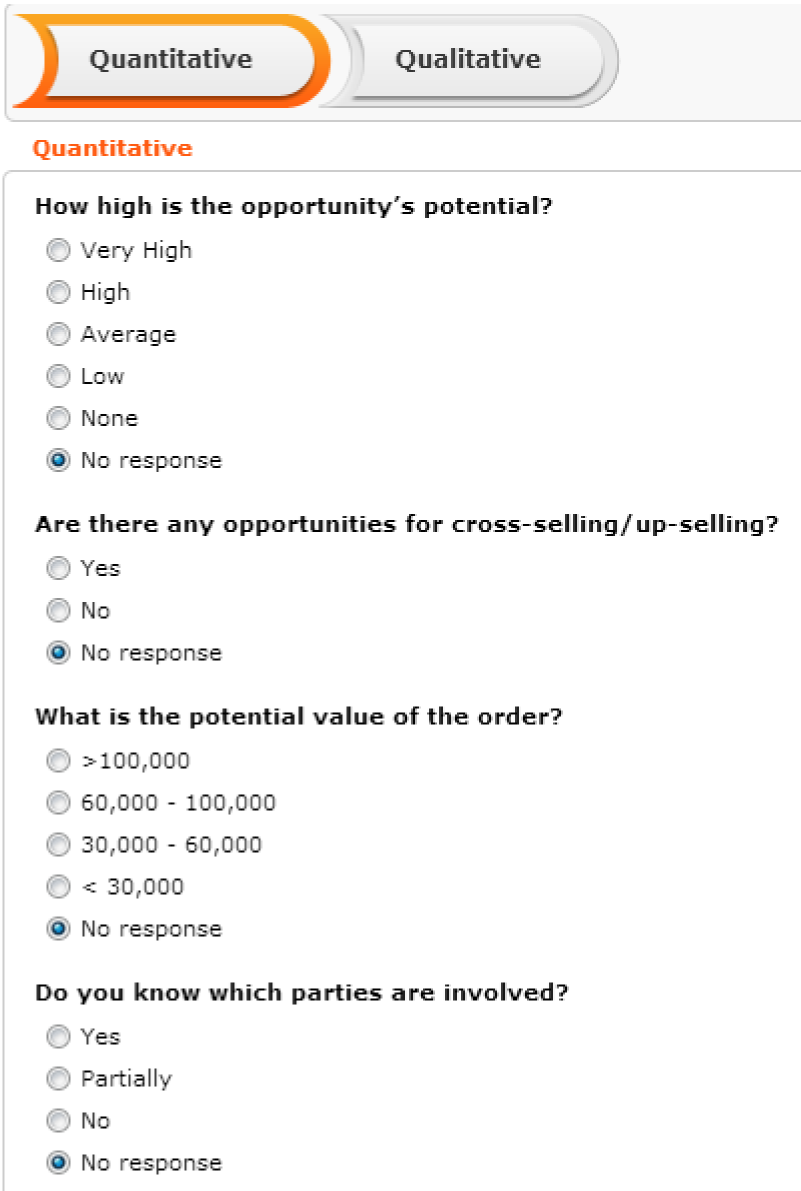
weighting of Questions:

Search Questions linked to Portfolio ABC

Search Results

...	Question	Portfolio axis	Max. Points	Weighting
1	Quantitative			
2	How high is the property's potential?	Potential	60,00	40,00%
3	Are there any opportunities for cross-selling/up-selling?	Potential	60,00	25,00%
4	What is the potential value of the order?	Potential	60,00	20,00%
5	Do you know which parties are involved?	Potential	60,00	15,00%
6	Qualitative			
7	Is the opportunity suitable as a reference?	Customer intimacy	40,00	25,00%
8	What level of internal investment is required?	Customer intimacy	40,00	25,00%
9	How complex is the project?	Customer intimacy	20,00	15,00%
10	Are the necessary internal resources available?	Customer intimacy	40,00	15,00%
11	Is the necessary expertise available internally?	Customer intimacy	40,00	10,00%
12	Are references available?	Customer intimacy	40,00	10,00%

Section 1: Quantitative Questions/Answers :



Quantitative | Qualitative

Quantitative

How high is the opportunity's potential?

- ○ Very High
- ○ High
- ○ Average
- ○ Low
- ○ None
- ◉ No response

Are there any opportunities for cross-selling/up-selling?

- ○ Yes
- ○ No
- ◉ No response

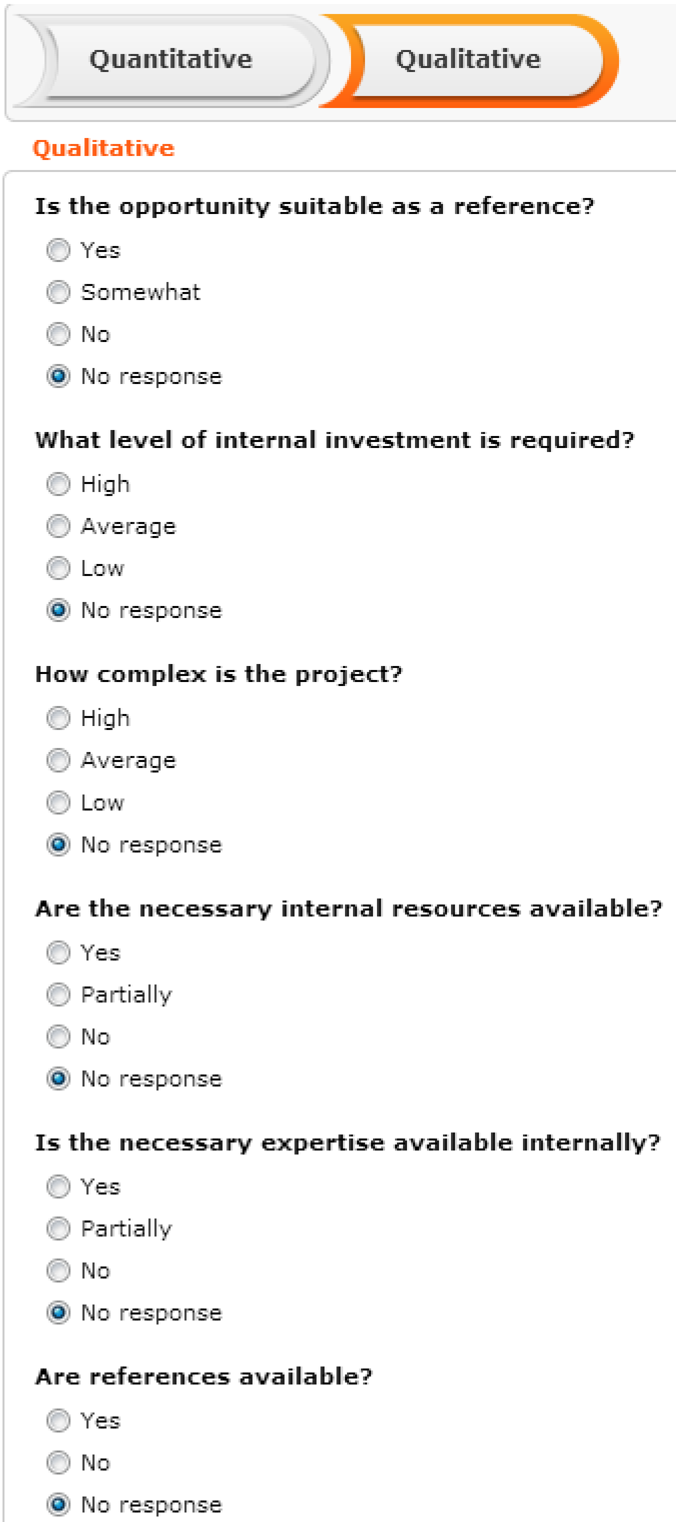
What is the potential value of the order?

- ○ >100,000
- ○ 60,000 - 100,000
- ○ 30,000 - 60,000
- ○ < 30,000
- ◉ No response

Do you know which parties are involved?

- ○ Yes
- ○ Partially
- ○ No
- ◉ No response

Section 2: Qulitative Questions/Answers :


Quantitative | Qualitative

Qualitative

Is the opportunity suitable as a reference?

- ( ) Yes
- ( ) Somewhat
- ( ) No
- (•) No response

What level of internal investment is required?

- ( ) High
- ( ) Average
- ( ) Low
- (•) No response

How complex is the project?

- ( ) High
- ( ) Average
- ( ) Low
- (•) No response

Are the necessary internal resources available?

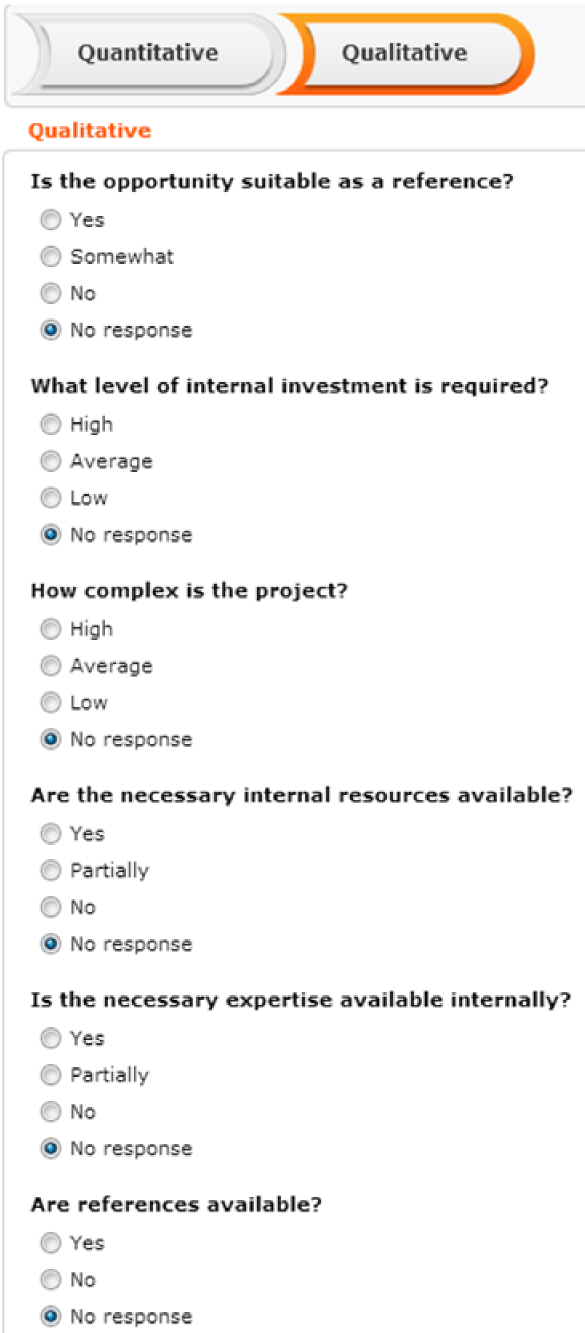
- ( ) Yes
- ( ) Partially
- ( ) No
- (•) No response

Is the necessary expertise available internally?

- ( ) Yes
- ( ) Partially
- ( ) No
- (•) No response

Are references available?

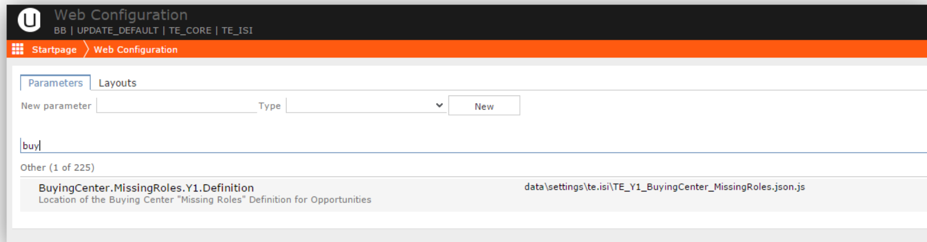
- ( ) Yes
- ( ) No
- (•) No response



Opportunity Buying Center Wall

With version 6 of the ISI template we activated the standard feature which is called "Buying Center Wall".

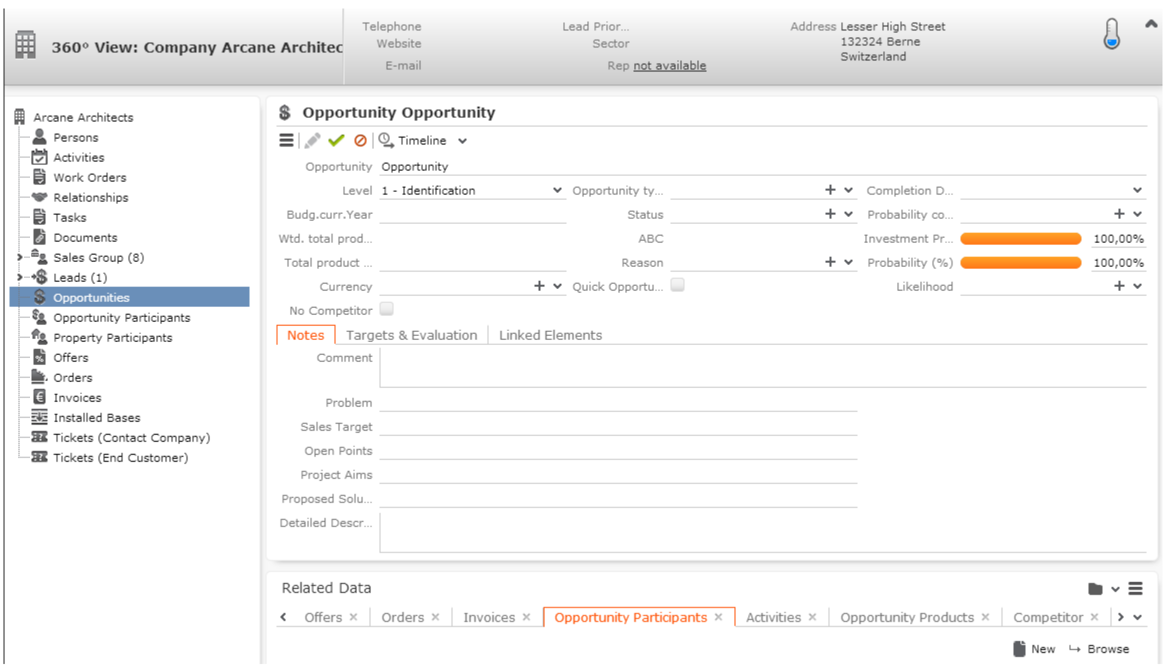
We adapted some things to fit the opportunity process, which is delivered by the template. The adaptions were made in the file "TE_Y1_BuyingCenter_MissingRoles.json.js" which can easily be changed using the web configuration parameter.



Opportunity Management Basic

The Opportunity Management Basic gives user the ability to create and manage opportunities inside the FI Tree, therefore no complex process is needed to manage opportunities.

The logic for changing values or changing the Opportunity level will be disabled, so the user can edit all values freely.

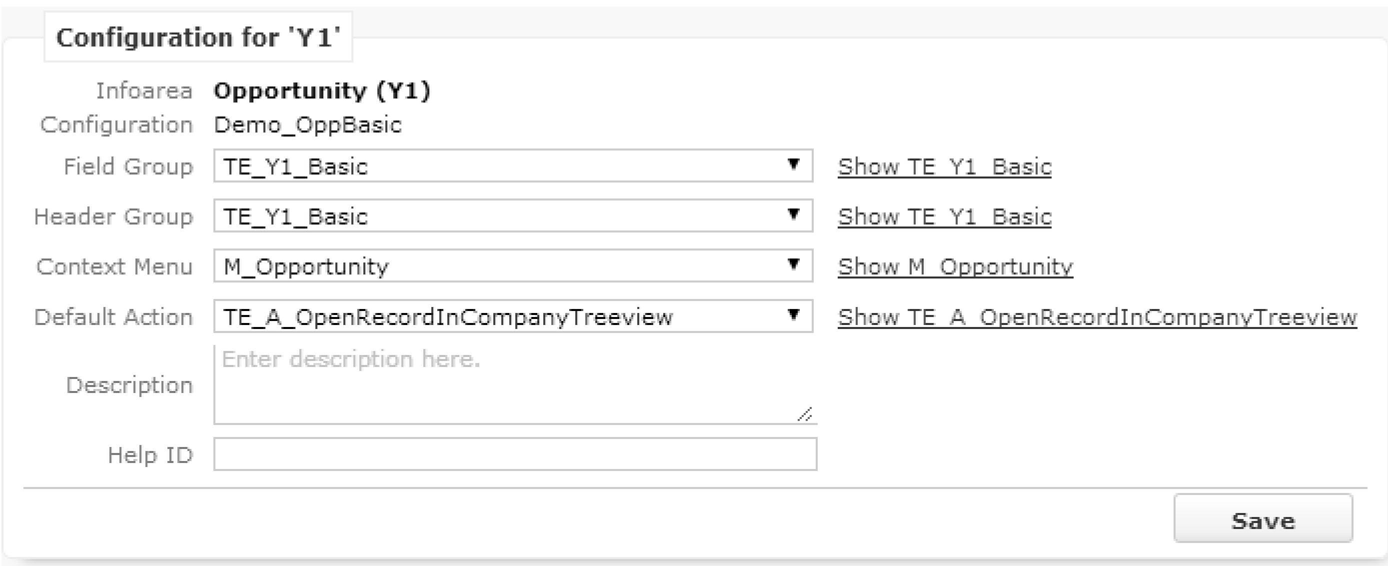


To use this functionality please follow the following steps:

Designer Settings

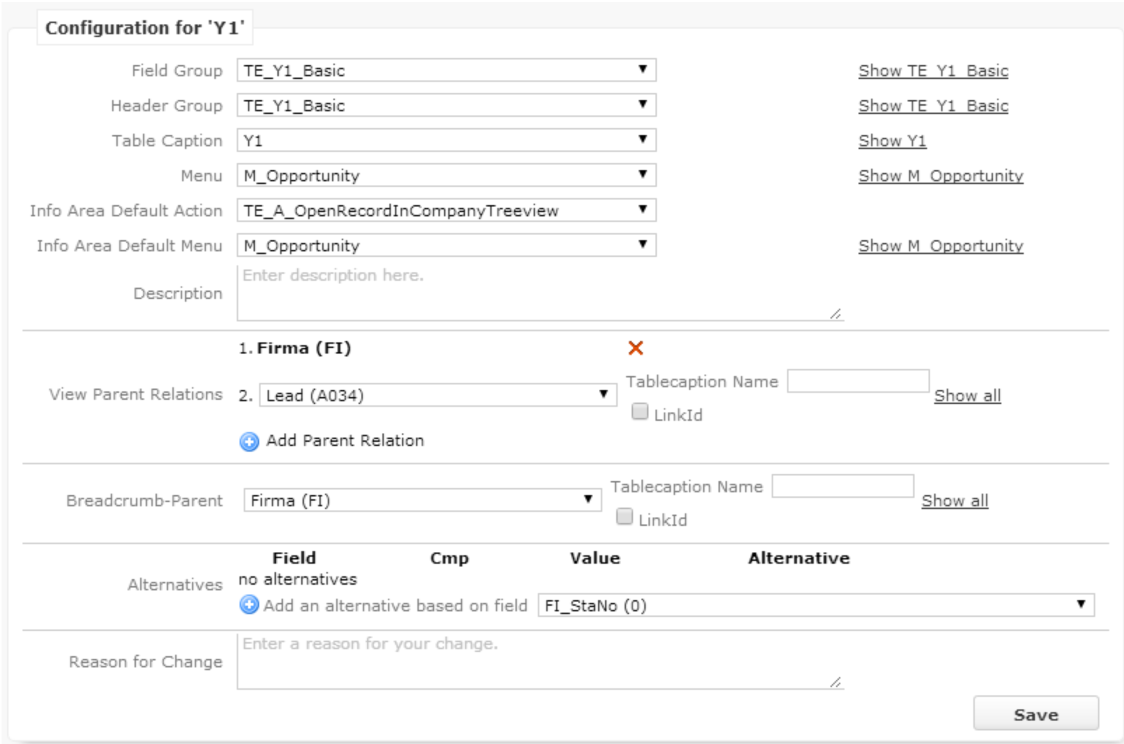
You need to edit the Search&Lists of Y1:

- change the Field Group and Header Group to TE_Y1_Basic
- change the Default Action to TE_A_OpenRecordInCompanyTreeview
- do this for the following Search&Lists:
  - Y1
  - Y1.Tree
  - Y1-FI
  - Y1-KP

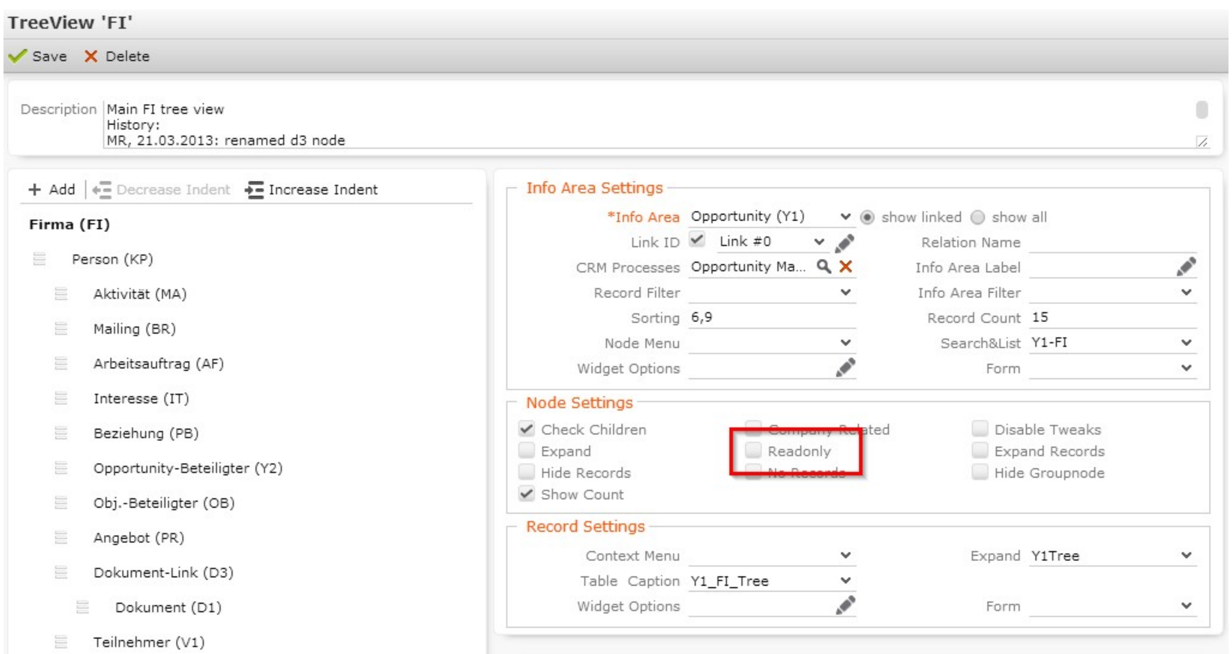


You also need to edit the Expand Configurations:

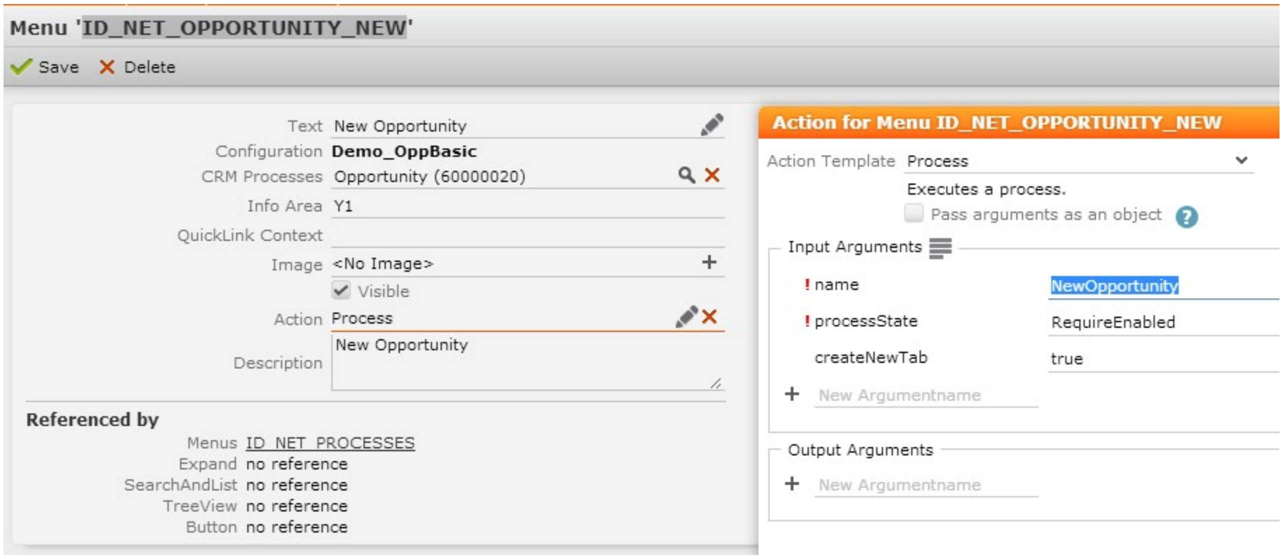
- change Field Group and Header Group to TE_Y1_Basic
- change the Default Action to TE_A_OpenRecordInCompanyTreeview
- remove all Alternatives
- do this for the following Expand Configurations:
  - Y1
  - Y1Tree



Now change the FI tree configuration, remove the ‘Readonly’ checkbox from the opportunity node:



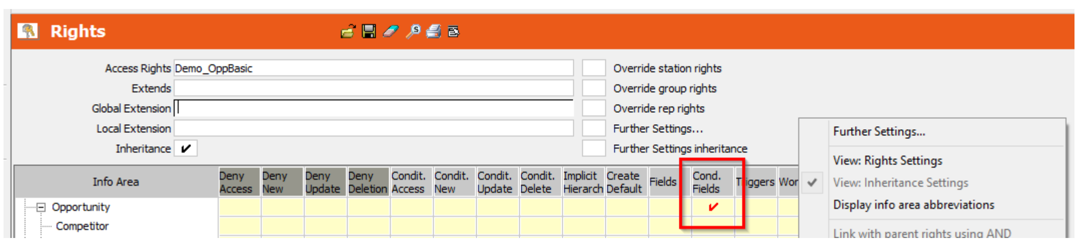
The last thing to do is to change the menu’s ‘ID_NET_OPPORTUNITY_NEW’ process to ‘NewOpportunity’:



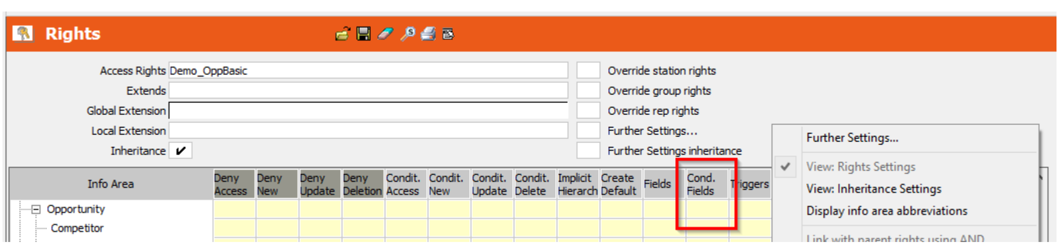
Rights Settings

Please define your rights settings as follows and assign this right to your desired login role:

Inheritance Settings

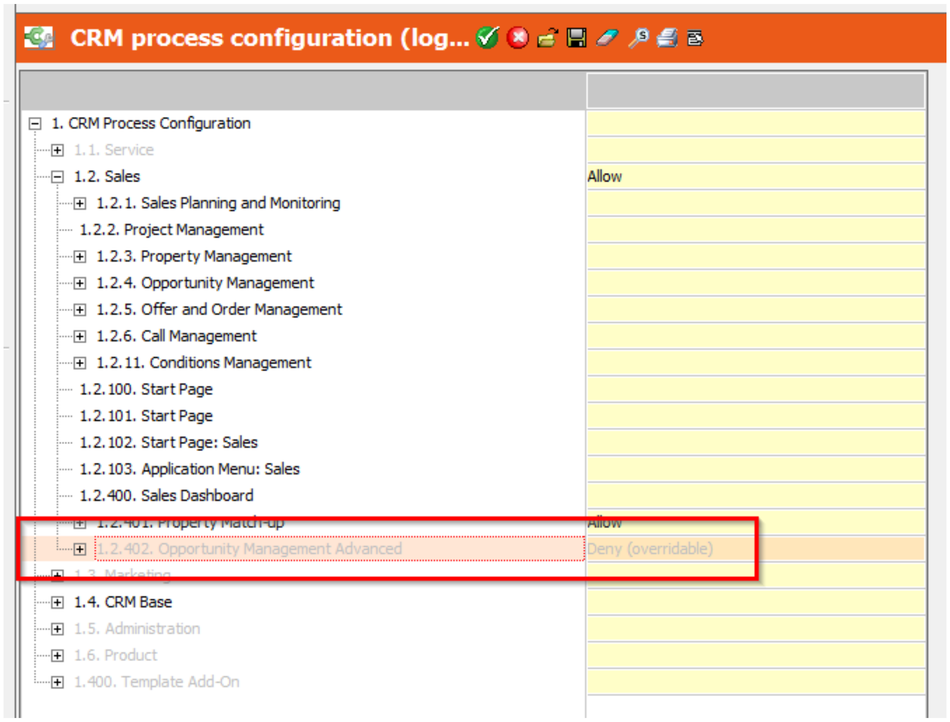


Rights Settings



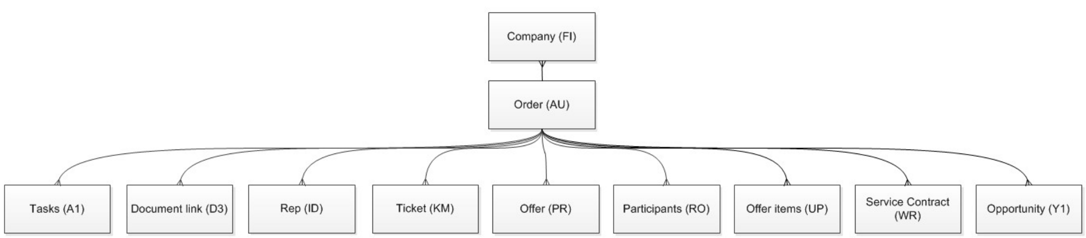
This needs to be done so that the fields in the opportunity can be edited no matter what the level of the opportunity is currently in.

As a last step, please deny the ‘1.2.402. Opportunity Management Advanced’ CRM process in your login role:



Order Management

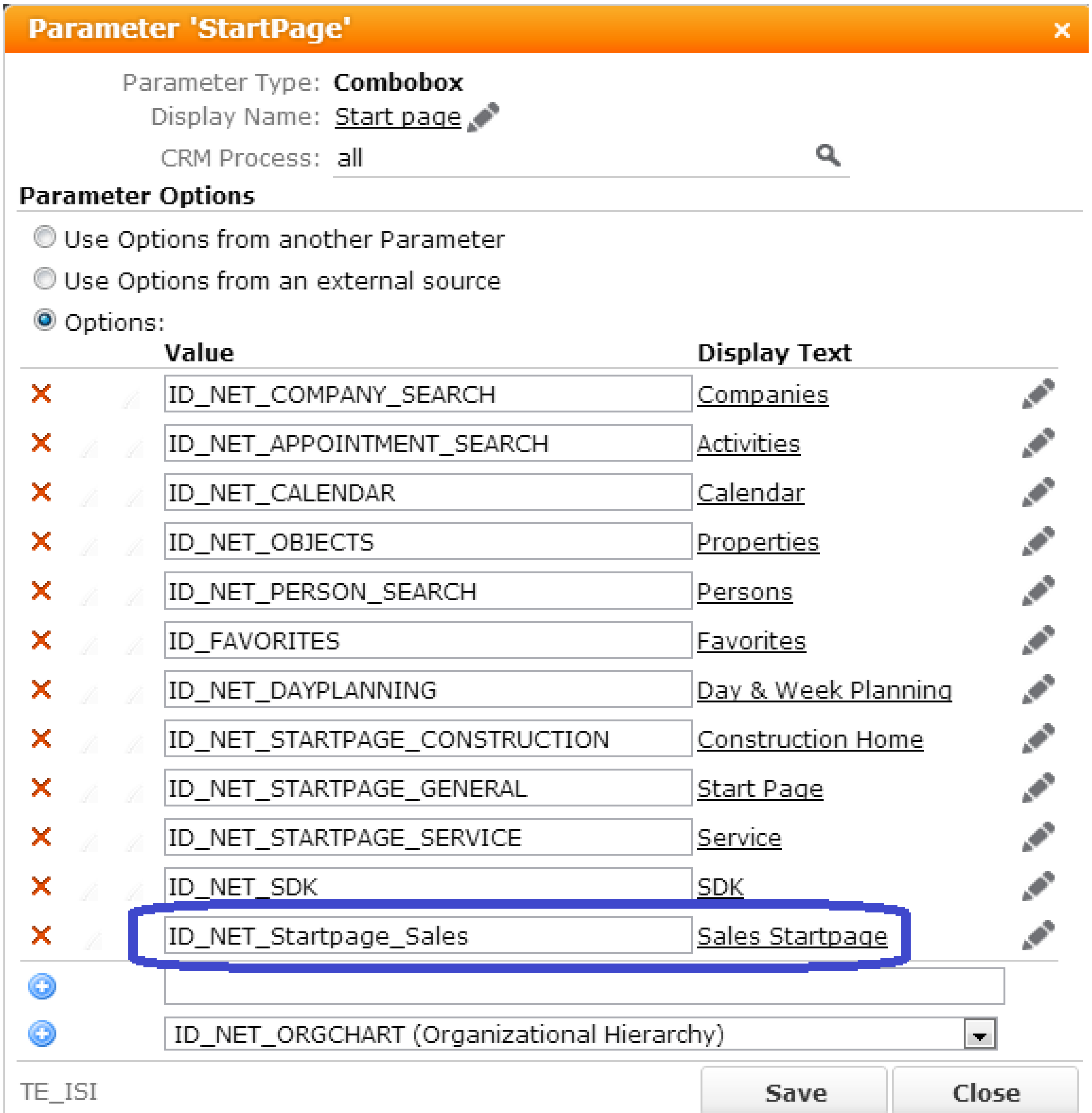
Learn how to manage sales order.



Sales Start Page

Web config parameter

The “Startpage” web config parameter is customized:

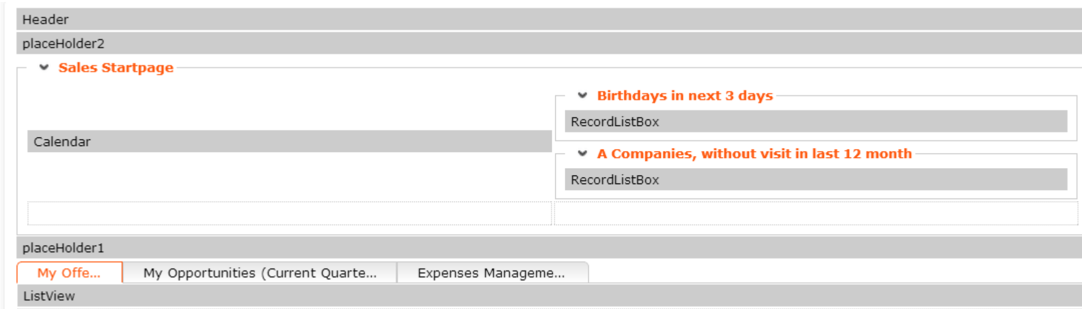


Therefore a new application menu action has been added:

This menu action is lodged with a ShowForm action which calls the “TE_Startpage_Sales” form.

“TE_Startpage_Sales” Form

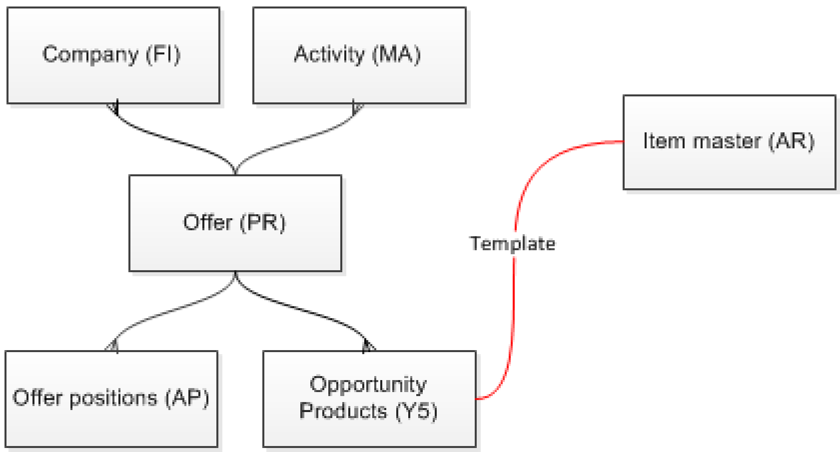
Form structure:



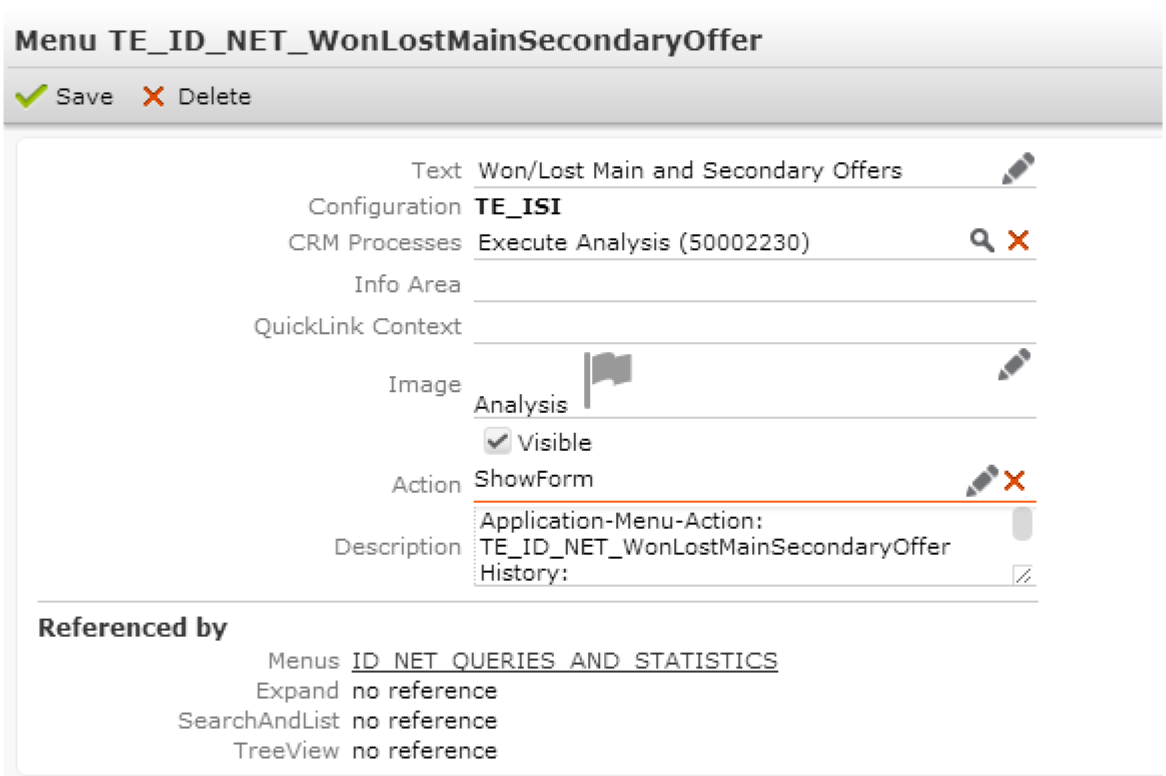
- The first header panel calls the “TE_Startpage_Sales” special header. A text and an icon are set as default.
- Furthermore, there is a placeholder which should separate the header and the first “Sales Startpage” group box panel.
- In this group box panel there is a calendar view on the left and two record list views on the right.
  - The calendar view is used from the default configuration. The only customized attribute is the view attribute: “view” -> “workweek”
  - The first recordlistview shows birthdays in the next 3 days. The “KP.TE_BirthdaysInTheNext3Days” filter was used to get the filtered records. Moreover the amount of records will be limited by the “maxRows” attribute which is set to 10. The “tableCaptionName” attribute which is set to “TE_KP_Sales_Startpage” is used to display the records in a certain format.
  - The second recordlistview shows all companies without a visit in the last 12 months. Used filter: “FI.ACompaniesWithoutVisitInLast12Month”, Used table caption: “TE_FI_Sales_Startpage”, “maxRows” set to 15.
- An additional placeholder is used after this groupbox . To define the height of the placeholder go to “DOM Element” tab at the selected object and create a new attribute under “css”. The “height” attribute was set to “10px”.
- Tab panel with 3 items.
  - The “My offers” tab contains a list view. Attributes: “autoLoad” set to “true”, “fieldControlType” set to “List”, “fieldGroupName” set to “PR”, filter set to “PR.MyOffersForSalesStartpage”.
  - The “My opportunities tab (Current Quarter) contains a list view. Attributes: “autoLoad” set to “true”, “fieldControlType” set to “List”, “fieldGroupName” set to “Y1”. Filter set to “Y1.MyOpportunitiesCurrentQuarter“.
  - The “Expenses Management” tab contains a search view. Attributes: “fixedFilterName” set to “A032.TE_Expenses_Startpage”, “showFilters” set to “false”, “useAutoSearch” set to “true”, “name” set to “TE_A032_ExpensesStartpage”.

Offer Management(CRM 5050001)

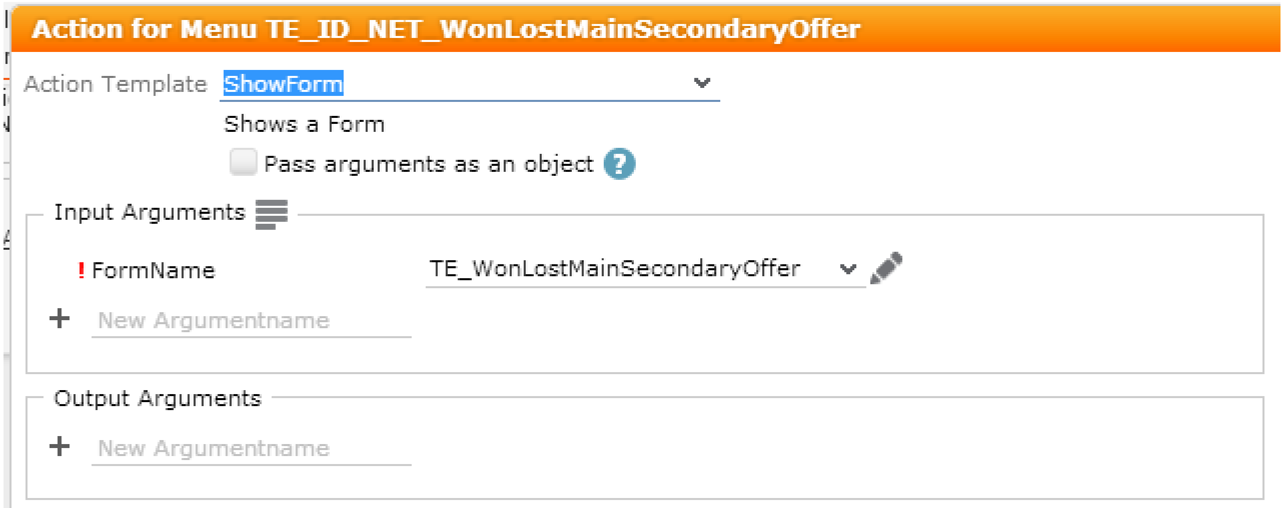
Learn how to manage offers.



Application Menu Entry: TE_ID_NET_WonLostMainSecondaryOffers



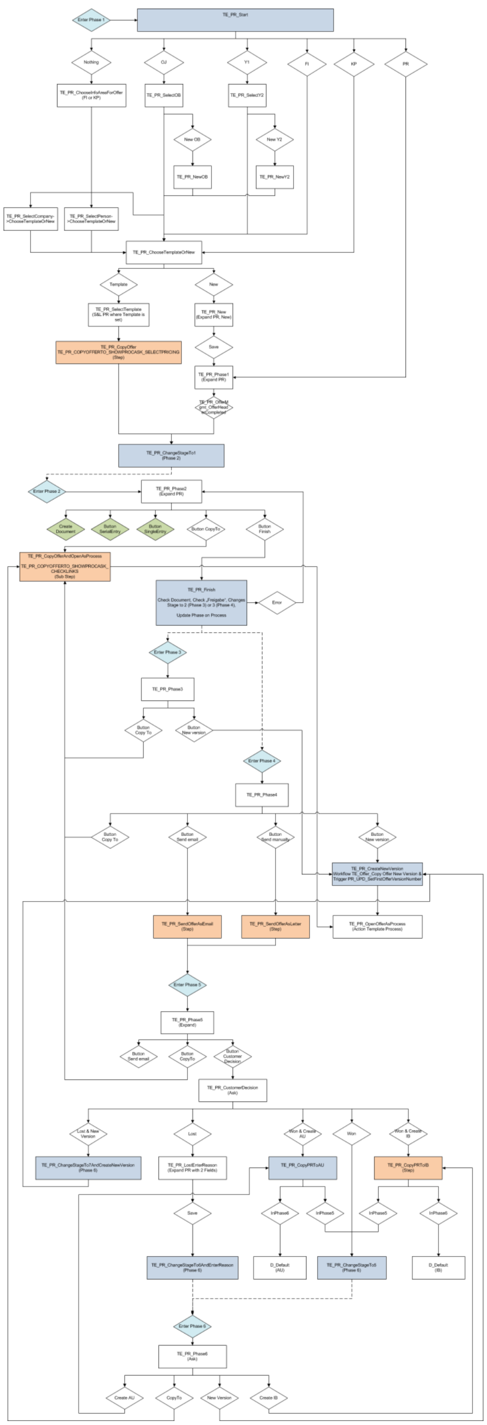
Usedtocalltherespectiveform.Themenuentryisdirectlyreferencedintheapplicationmenu “ID_NET_QUERIES_AND_STATISTICS”.



The above mentioned form is called. No additional parameters had to be used.

Offer Process

A detailed technical description of the process is available as a Visio document (hyperlink in PVCS):



- **Used Headers**

Phase	Name	Description
1	TE_PR_Phase1_With-outChildren	Expandview shown in phase 1

2-5	TE_PR_Phase2to5	Expandview shown in phase 2 to 6
6	TE_PR_Offer-Mgmt_LostEnterReason	Expandview shown in phase 6 if offer is lost

- **Used Field Groups**

Phase	Name	Description
6	TE_PR_OfferMgmt_Lost	In case of lost Offer an additional Group with competitor and reason is displayed.
6	TE_PR_Offer-Mgmt_LostEnterReason	Small Expandview in case of offer lost.

- **Used Process Asks**

Phase	Name	Description
2	TE_PR_CopyOffer-To_CheckLinks	Used in phase 2.
1-6	TE_PR_CopyOffer-To_CopyAgain	Used in every Phase when the Offer is copied to a target
1	TE_PR_CopyOfferTo_Se-lectPricing	Used in Phase 1
1	TE_PR_OfferMgmt_Choo-seInfoAreaForOffer	Asks the user if he wants to create a new offer for a company or a person.
1	TE_PR_Offer-Mgmt_ChooseTemplate-OrNew	Used in Phase 1
6	TE_PR_OfferMgmt_Cus-tomerDecision	Used in phase 5
3	TE_PR_SendOfferAsE-mail_CreateDcoument	Shown if there is no docu-ment linked with the offer while sending

- **Used Process Steps**

Phase	Name	Description
1	TE_PR_Offer-Mgmt_ChangeStageTo1	Changes the state of the offer to "1 - Offer Items (In progress)" and dispatches to step assigned to this phase.
4	TE_PR_Offer-Mgmt_ChangeStageTo4	Changes the state of the offer to "4 - Waiting for Decision".
5	TE_PR_Offer-Mgmt_ChangeStageTo5	Changes the state of the offer to "5 - Closed - Won"
5	TE_PR_Offer-Mgmt_ChangeStageTo6An-dEnterReason	Changes the state of the offer to "6 - Closed - Lost"
5	TE_PR_Offer-Mgmt_ChangeStageTo7And-CreateNewVersion	Changes the state of the offer to "7 - Closed - Versioning"
1	TE_PR_OfferMgmt_Choose-InfoAreaForOffer	Asks the user if he wants to create a new offer for a company or a person.
1-6	TE_PR_Offer-Mgmt_ChooseTemplate-OrNew	Asks the user if he wants to create a new offer or from an existing template
1-6	TE_PR_OfferMgmt_CopyOf-fer	Calls a sub step to copy the offer to the given "link" (KP or FI). Note: sub step "TE_PR_CopyOfferTo_ShowProcAsk_Select-Pricing" is part of process "TE_PR_CopyOffer-To".
1-6	TE_PR_OfferMgmt_CopyOf-ferAndOpenAsProcess	Copys the current Offer.
6	TE_PR_OfferMgmt_Copy-PRToAU	Convert the offer into an order. (same action as in the menu action 'A_CopyOfferToOrder')
1-6	TE_PR_OfferMgmt_Copy-PRToIB	not implemented right now
1-6	TE_PR_OfferMgmt_Create-NewVersion	Creates a new version of an offer. (note this is actually a duplicate of step 'TE_PR_Create-NewOfferVersion_CallWorkflow' but this step will start the offer management with the newly created offer version)

5	TE_PR_OfferMgmt_CustomerDecision	Displays the ProcessAsk for the customer's decision.
6	TE_PR_OfferMgmt_Finish	'Finishes' the offer: checks if a document exists and if so changes the phase according to the approval flag.
5	TE_PR_OfferMgmt_LostEnterReason	Displays an expand view where the user has to enter against whom the offer was lost.
1	TE_PR_OfferMgmt_New	Creates a new PR record.
1	TE_PR_OfferMgmt_NewOB	This step creates an ObjectParticipant and forwards it afterwards to the next step "TE_PR_OfferMgmt_ReadLink->ChooseTemplateOrNew" which is responsible for extracting the newly created ObjectParticipants Parents (FI or KP)
1	TE_PR_OfferMgmt_NewY2	This step executes a sub step, which is the initial step of an existing BTB default process (NewParticipantForOpportunity) for the creation of an OpportunityParticipant and forwards it afterwards to the next step "TE_PR_OfferMgmt_ReadLink->ChooseTemplateOrNew" which is responsible for extracting the newly created OpportunityParticipants Parents (FI or KP)
1-6	TE_PR_OfferMgmt_OpenOfferAsProcess	Restarts the offer management process with the given offer uid. (the action ends the current running process, and by calling the action template 'Process' a new process will be started)
1	TE_PR_OfferMgmt_Phase1	Initial view of phase 1. Shows the expand view of the offer.
2	TE_PR_OfferMgmt_Phase2	Initial view of phase 2. Shows the expand view of the offer.
3	TE_PR_OfferMgmt_Phase3	Initial view of phase 3. Shows the expand view of the offer.
4	TE_PR_OfferMgmt_Phase4	Initial view of phase 4. Shows the expand view of the offer.
5	TE_PR_OfferMgmt_Phase5	Initial view of phase 5. Shows the expand view of the offer.

6	TE_PR_OfferMgmt_Phase6	Initial view of phase 6. Shows the expand view of the offer.
1	TE_PR_OfferMgmt_Read-Link->ChooseTemplate-OrNew	Reads the parent record (KP or FI) of the given uid and forwards it to the next step "TE_PR_OfferMgmt_ChooseTemplateOrNew".
1	TE_PR_OfferMgmt_Select-Company->ChooseTemplate-OrNew	Select a company to which the offer will be created.
1	TE_PR_OfferMgmt_Selec-tOB	Shows the participants (OB) of a property (OJ, input argument "link") and allows users to 1.) select an existing participant. 2.) click button "New" to create a new property participant.
1	TE_PR_OfferMgmt_Select-Person->ChooseTemplate-OrNew	Select a person to which the offer will be cre-ated.
1	TE_PR_OfferMgmt_Select-Template	Search and list to select an offer template.
1	TE_PR_OfferMgmt_SelectY2	Depending on the selected Opportunity (Y1 - input Argument: "link") this step opens the search for OpportunityParticipants (Y2) where you have the options to: 1.) either select an existing OpportunityParticipant and forward it’s Parent (FI or KP) to the step "TE_PR_Of-ferMgmt_ChooseTemplateOrNew" 2.) or click on the "New" Button in the header to be for-warded to further steps for creating a new OpportunityParticipant
4	TE_PR_OfferMgmt_SendOf-ferAsEmail	Calls the initial step of the Process "TE_PR_SendOfferAsEmail" designed by the Template Team and forwards incoming uid to the step which updates the process phase
1	TE_PR_OfferMgmt_Start	Checks argument "link" and dispatches accord-ing to its info area.
1-6	TE_PR_OfferMgmt_Up-datePhase	Updates the phase of the process (e.g. after the offset stage has been changed by a work-flow/trigger).
1-6	TE_PR_OfferMgmt_Up-datePhase	Updates the phase of the process (e.g. after the offset stage has been changed by a work-flow/trigger).

1-6	TE_PR_OfferMgmt_UpdatePhase	Updates the phase of the process (e.g. after the offset stage has been changed by a workflow/trigger).
1-6	TE_PR_OfferMgmt_UpdatePhase	Updates the phase of the process (e.g. after the offset stage has been changed by a workflow/trigger).

- **Used Triggers**

Phase	Name	Description
1	PR_UPD_OfferMgmt_Phase1	Used for changing phases (switch stage from 0 to 1)
2	PR_UPD_OfferMgmt_Phase2	Used for changing phases (switch stage from 1 to 2)
3	PR_UPD_OfferMgmt_Phase3	Used for changing phases (switch stage from 2 to 3)
4	PR_UPD_OfferMgmt_Phase4	Used for changing phases (switch stage from 3 to 4)
5	PR_UPD_OfferMgmt_Phase5_Lost	Used for changing phases (switch stage from 4 to 6)
5	PR_UPD_OfferMgmt_Phase5_Versioning	Used for changing phases (switch stage from 4 to 7)
5	PR_UPD_OfferMgmt_Phase5_Won	Used for changing phases (switch stage from 4 to 5)
3	PR_UPD_OfferMgmt_SetStageOnApproval	Used for changing phases (switch stage to 3 when field approval has the value approved)

Since the editing of the offer is declined in most phases, the switching of the ‘stage’ field is always done by triggers.

- **Used Actions**

Phase	Name
2-5	TE_A_PR_CreateNewOfferVersion_QueryState

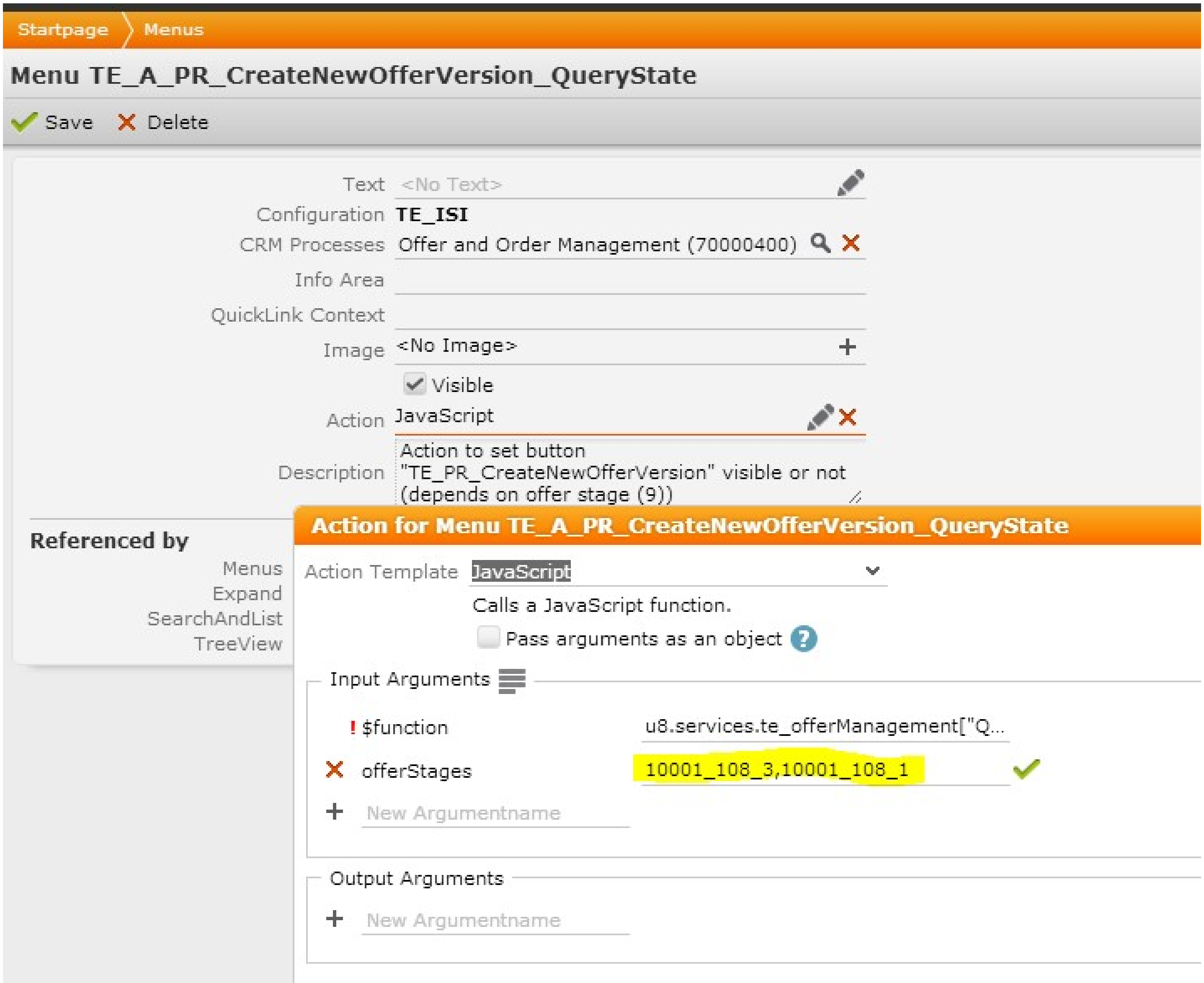
1	TE_A_PR_OfferCompleted_QueryState
2,3	TE_A_PR_CreateOfferDocu-ment_QueryState
4	TE_A_PR_SendOfferAsEmail_QueryS-tate
5	TE_A_PR_Decision_QueryState
2	TE_A_PR_Edit_QueryState (used for Edit/Save/Cancel)

Buttons in phases 2 to 5 are controlled by QueryActions.

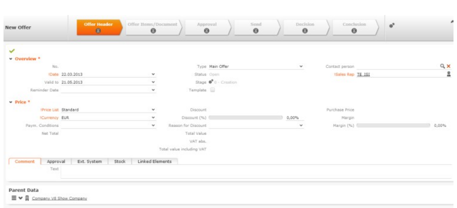
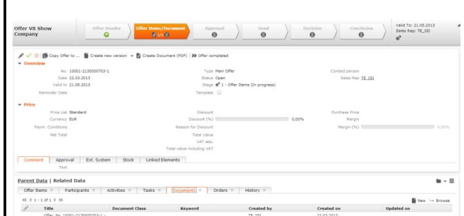
The external keys of stages controls which buttons are used in which phase.

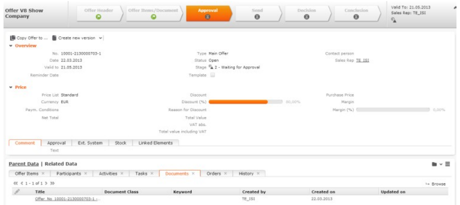
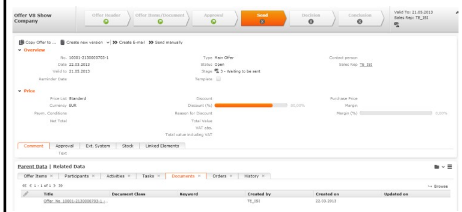
Phase	External Key	Stage
1	10001_108_6	0 - Creation
2	10001_108_2	1 - Offer Items (In progress)
3	10001_108_3	2 - Waiting for Approval
4	10001_108_1	3 - Waiting for Transmis-sion
5	10001_108_4	4 - Waiting for Decision
6	10001_108_5	5 - Closed - Won
6	10001_108_7	6 - Closed - Lost
6	10001_108_8	7 - Closed - Versioning

Example:



- **Screenshots**

Phase 1 Offer Header:	Phase 2 Offer Items/Document:
	

Phase 3 Approval:	Phase 4 Send (waiting for Transmission):
	
Phase 5 Decision:	Phase 6 Conclusion:

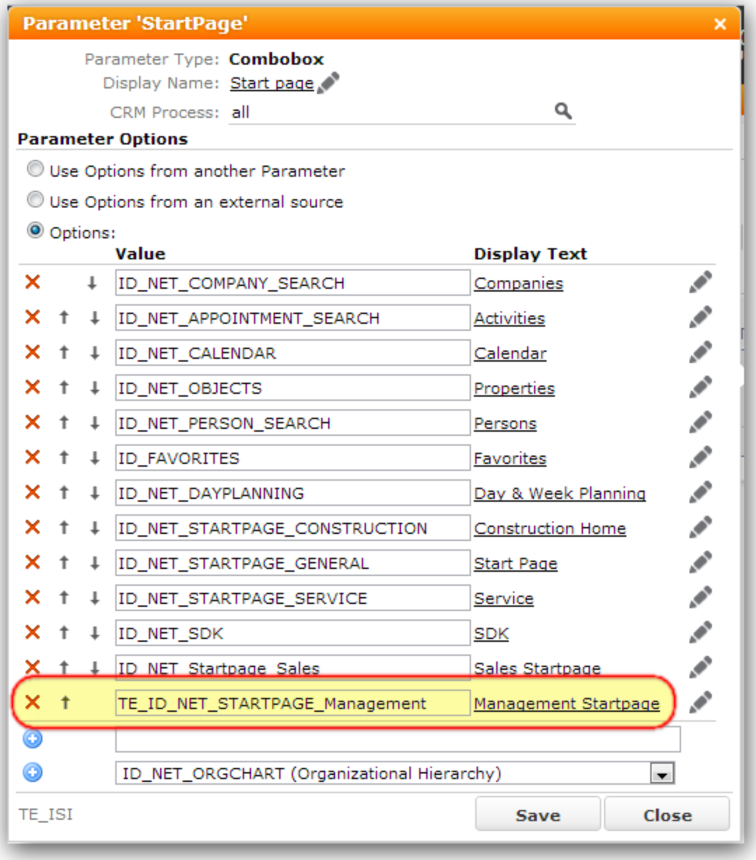
Currently not implemented

- Copy to installed base
- Harmonization of different currencies
- Approval by superior

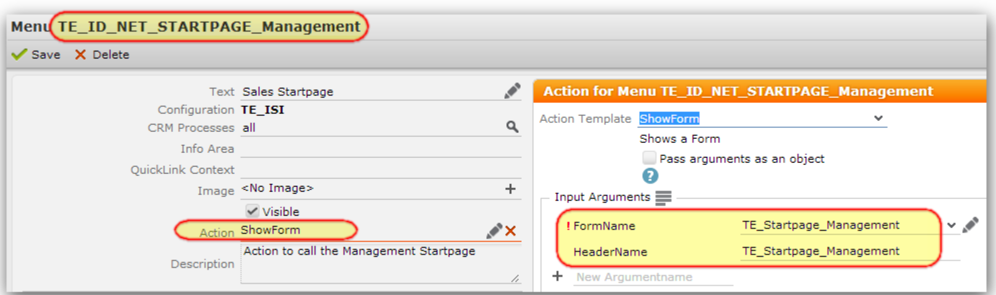
When a new version of a lost offer is created, then the ‘competitor’ and ‘reason offer lost’ fields are not cleared

Offer Approval – Management Start Page

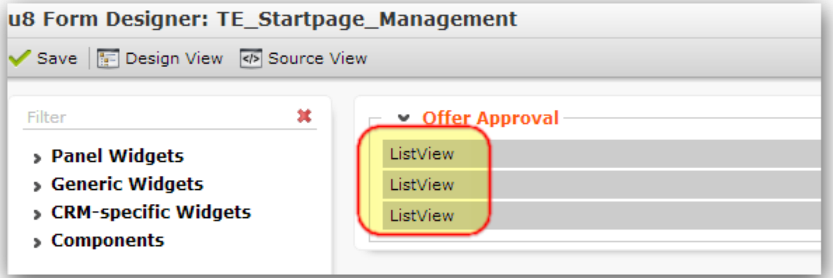
The web config parameter “Startpage” has been extended:

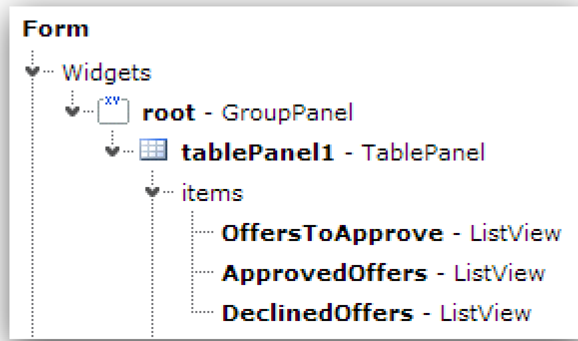


A new “TE_ID_NET_STARTPAGE_Management” action has been created to call the new start page:



Start page form:





The form contains 3 list view widgets to display the “offers to approve”, the already “approved offers”, and the “declined offers.”

A header group per list displays special buttons to approve or to decline a selected offer in the list. Used header groups:

TE_PR_ReleaseApproved

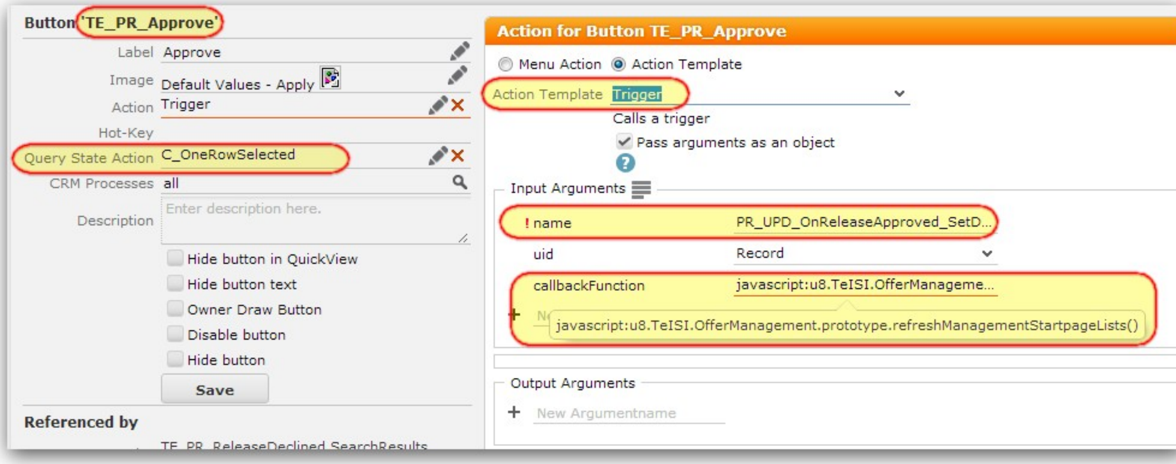
TE_PR_ReleaseDeclined

TE_PR_ReleaseRequired

Used buttons:

TE_PR_Approve

TE_PR_Decline



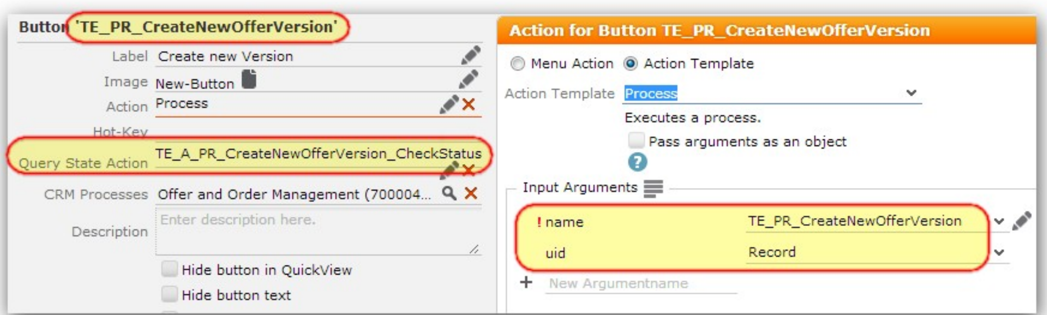
Used triggers:

- PR_UPD_OnReleaseApproved_SetData
- PR_UPD_OnReleaseDeclined_SetData

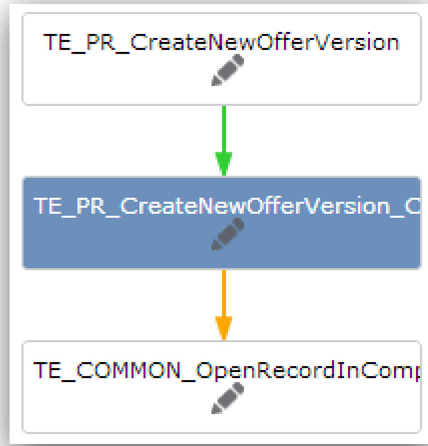
The JavaScript callback function is located in the “offermanagement.js” file and simply refreshes the 3 lists on the start page.

Offer Versioning

A new button called “TE_PR_CreateNewOfferVersion” has been created and is displayed on the Offer Expand mask. The QueryState action “TE_A_PR_Create-NewOfferVersion_CheckStatus” hides or unhides the button depending on the stage of the offer. The JavaScript function is located in the “offermanagement.js” file.



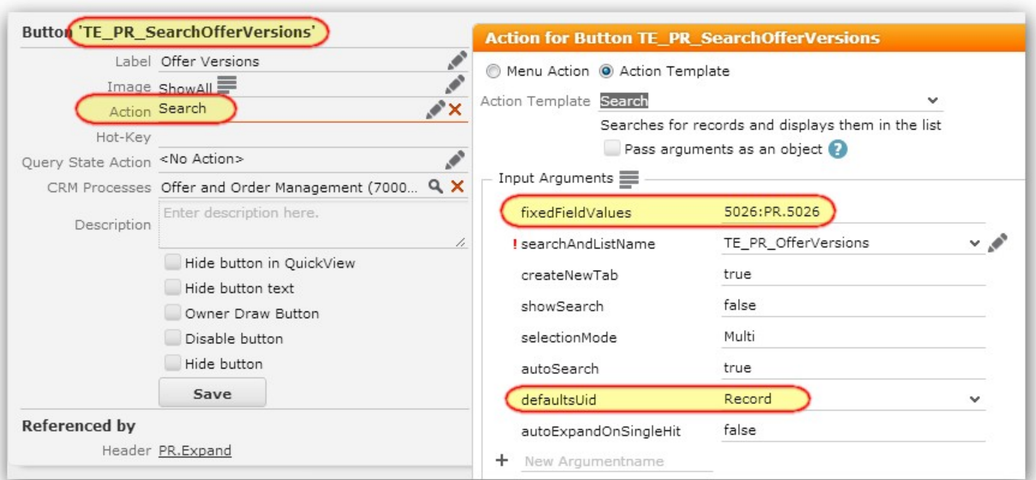
The “TE_PR_CreateNewOfferVersion” process does nothing else but to call the “TE_Offer_Copy Offer New Version” workflow to create a new version of the offer. The process displays the new offer in company tree view after the execution of the workflow. The old offer will be locked.



Another button has been crated to display all offer versions which are related to a special offer record. This button is also displayed in the Expand header of an offer.

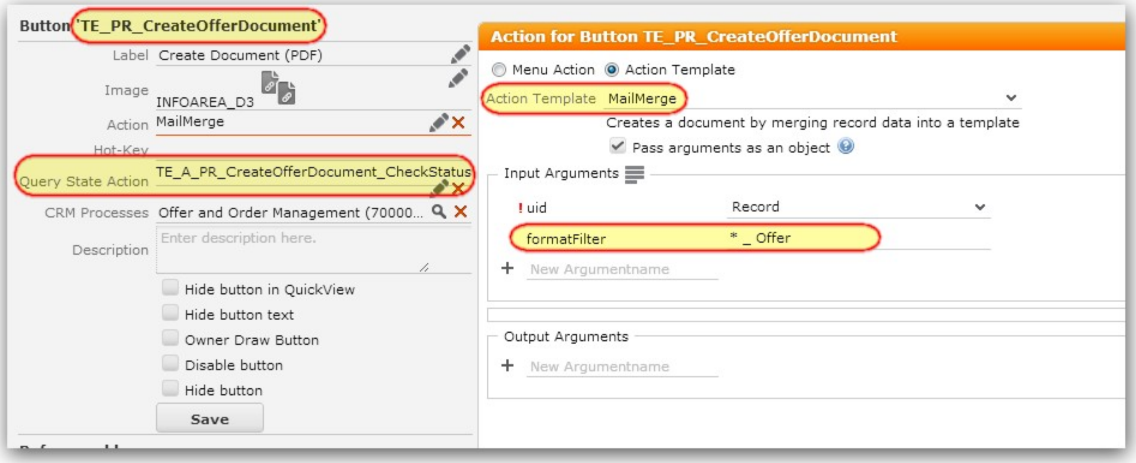
Button: “TE_PR_SearchOfferVersions”

The search mask is prefilled with the correct offer number by using the “fixedField-Values” and “defaultsUid” parameters.

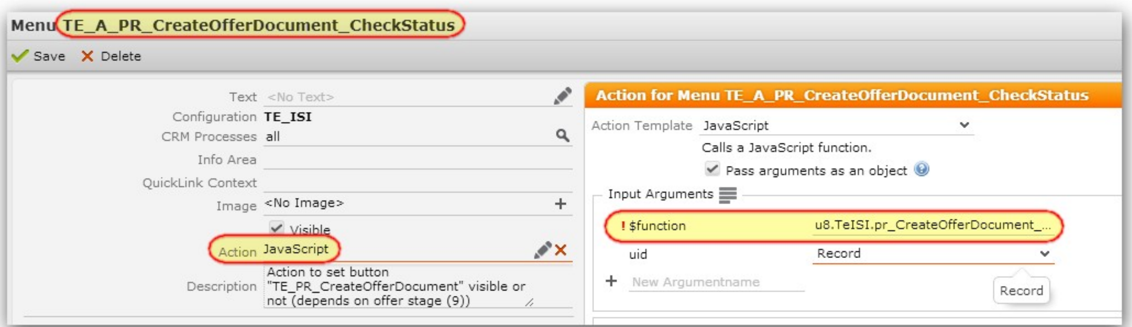


Create Offer Document

A new Button called “TE_PR_CreateOfferDocument” has been created.



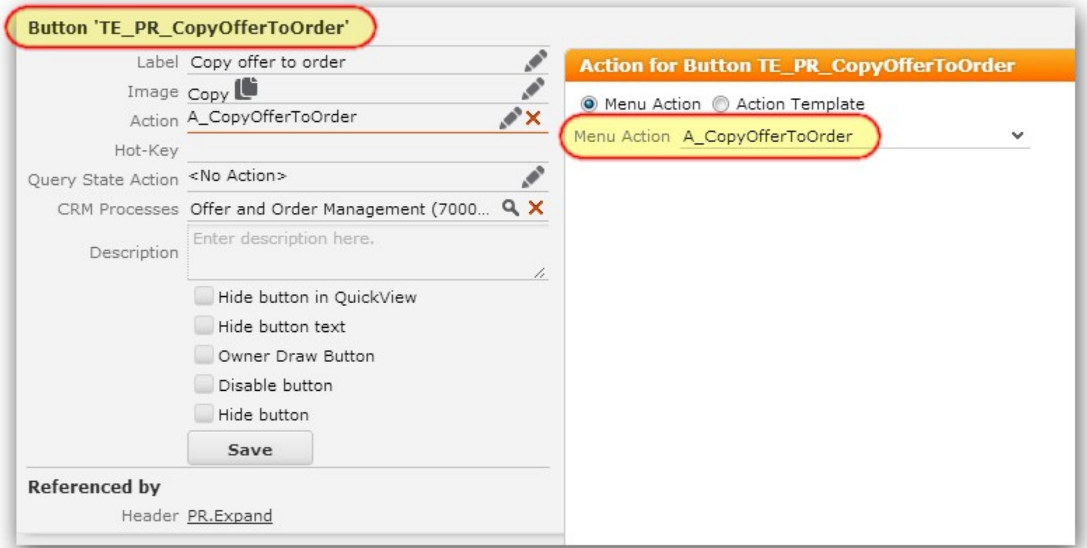
The “TE_A_PR_CreateOfferDocument_CheckStatus” query state action is used to set the button active or inactive:



Calling the “pr_CreateOfferDocument_Button_CheckStatus” (\web\scripts\te.isi\te.isi.js) function.

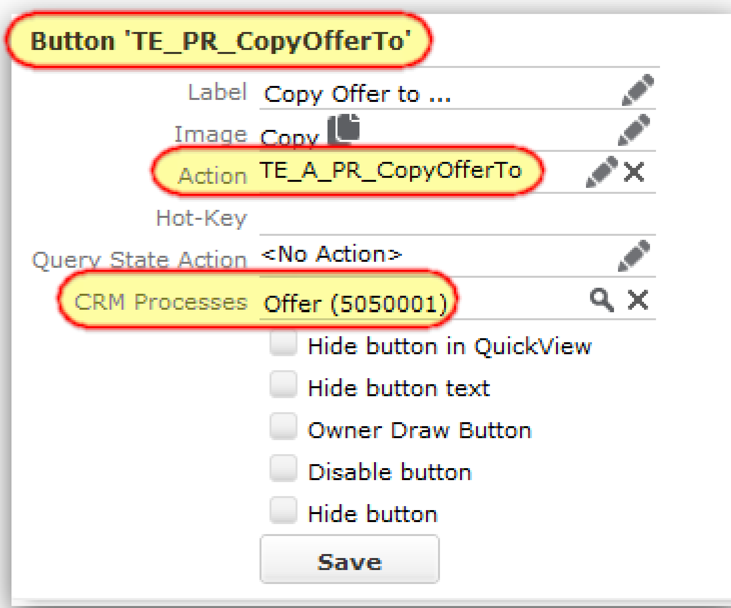
Copy Offer to Order

A new button called “TE_PR_CopyOfferToOrder” has been created and is shown in the offer expand mask. This button uses the “A_CopyOfferToOrder” standard action to create an order depending on the offer record.

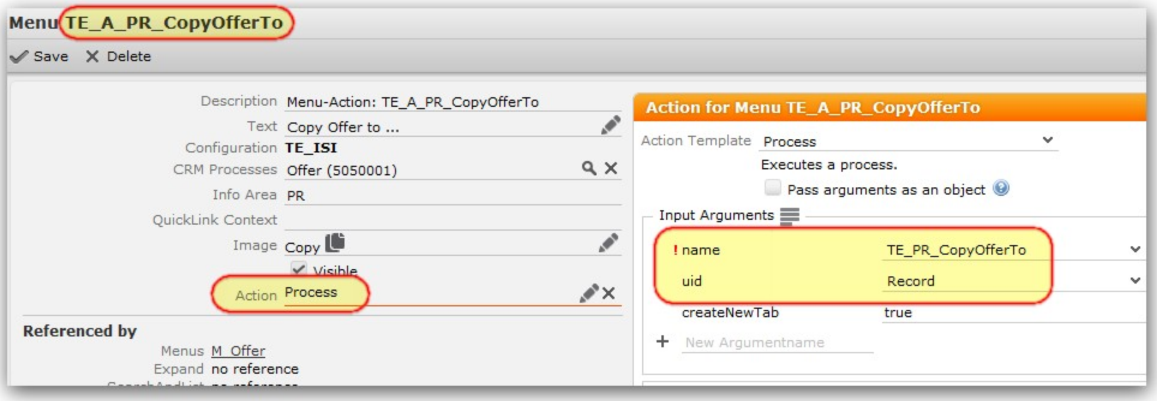


Copy Offer to

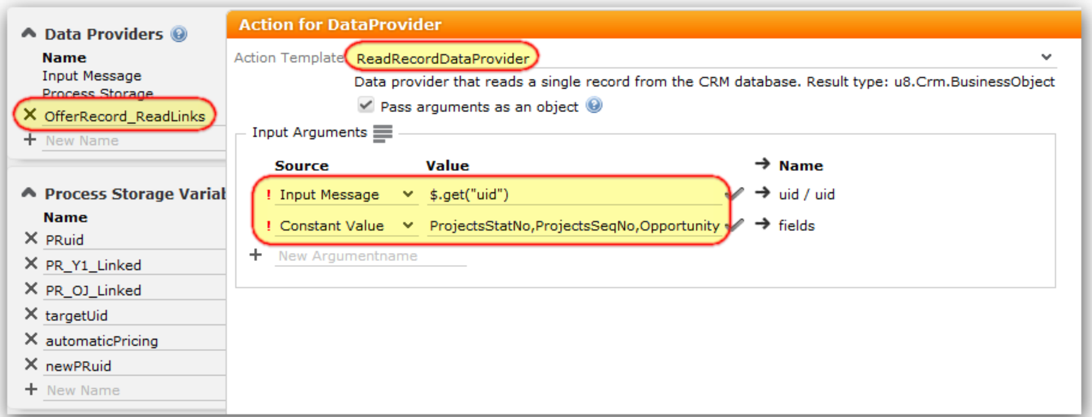
New “TE_PR_CopyOfferTo” button which calls a menu action



This menu action calls the new “TE_PR_CopyOfferTo” process:



By reading the StaNo and SeqNo of the linked construction project and the linked opportunity and using the "OfferRecord_ReadLinks" data provider we check if the offer is linked to a construction project or an opportunity.



Used process steps:

1. TE_PR_CopyOfferTo_ShowProcAsk_CheckLinks (Initial Step)
2. Search and lists:
   a. TE_PR_CopyOfferTo_SelectFI
   b. TE_PR_CopyOfferTo_SelectKP
   c. TE_PR_CopyOfferTo_SelectOB
   d. TE_PR_CopyOfferTo_SelectY2
   e. TE_PR_CopyOfferTo_SelectFV
3. TE_PR_CopyOfferTo_ShowProcAsk_SelectPricing
4. Steps to call the workflows:
   a. TE_PR_CopyOfferTo_CallWorkflow_FI
      TE_PR_CopyOfferTo_CallWorkflow_KP
      TE_PR_CopyOfferTo_CallWorkflow_OB
      TE_PR_CopyOfferTo_CallWorkflow_Y2
5. TE_PR_CopyOfferTo_ShowProcAsk_CopyAgain

Used process asks:

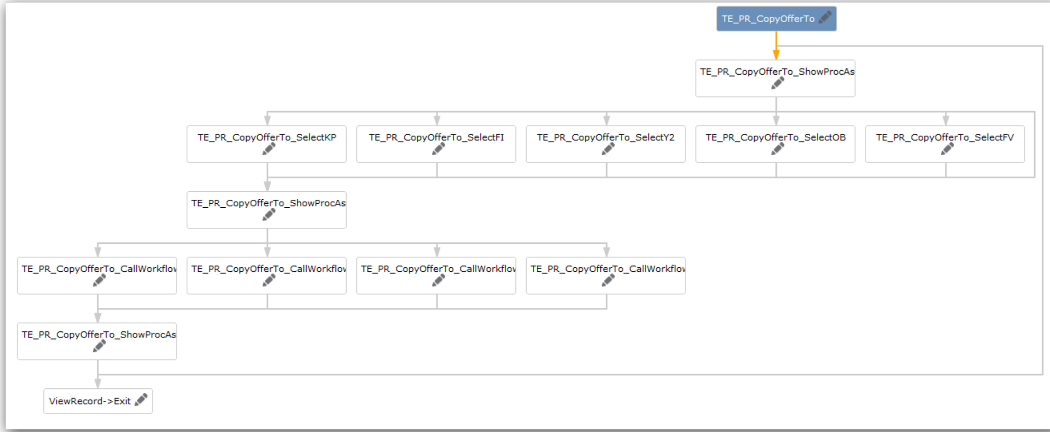
- TE_PR_CopyOfferTo_CheckLinks (display “copy to” buttons: e.g.: company, person, favorites ...)
- TE_PR_CopyOfferTo_CopyAgain (prompts the user to copy the offer again to another target)
- TE_PR_CopyOfferTo_SelectPricing (prompts the user to enable or disable pricing)

Used workflows:

- TE_Offer_Copy OfferToFI
- TE_Offer_Copy Offer
- TE_Offer_Copy Offer from template to property
- TE_Offer_Copy Offer from template to opportunity

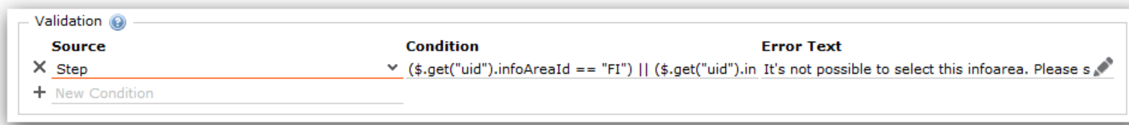
For a detailed description see the description field f the process steps!

Process overview:

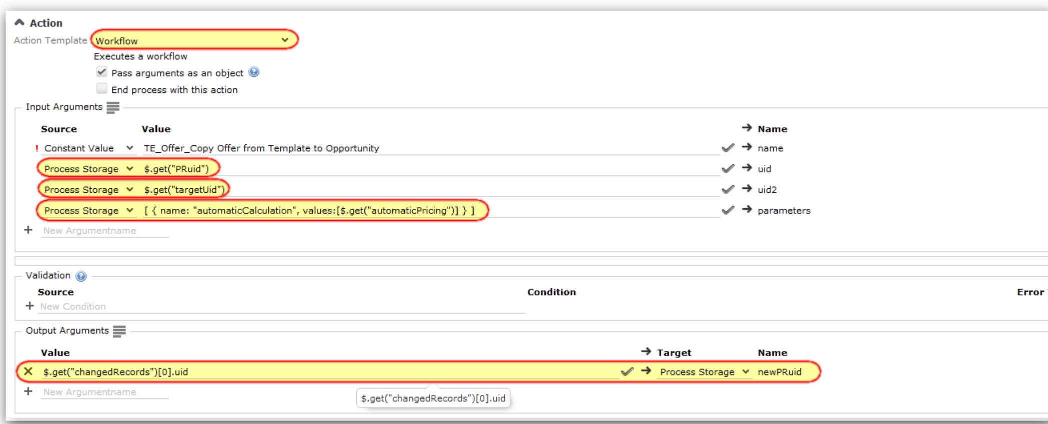


Implemented functionality: check the info areas of the record, which the user selects by clicking the “recently used” items or by selecting a record from the favorites.

Allowed info areas: FI, KP, OB, Y2



Step which calls a workflow:

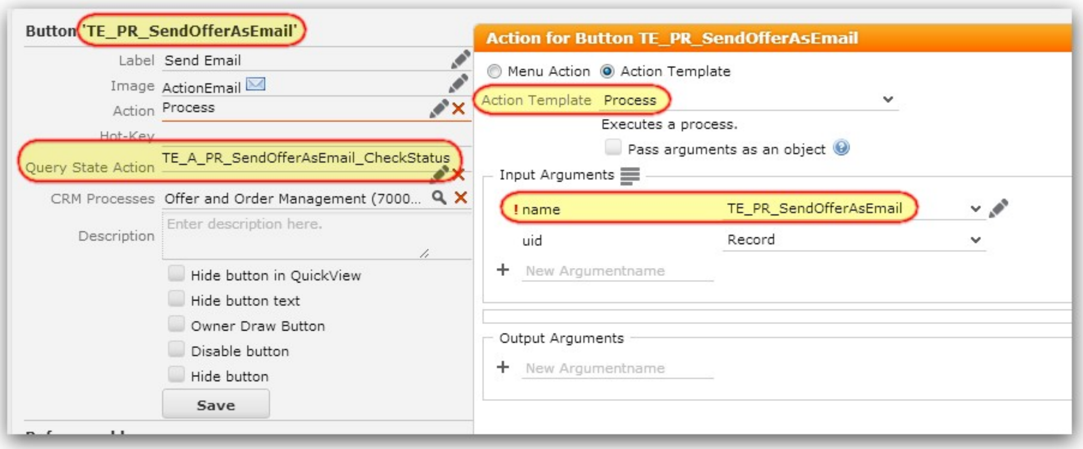


1. Workflow name
2. Offer record (uid)
3. Target record (uid2   FI, KP, OB, Y2)
4. Additional parameters: automaticCalculation

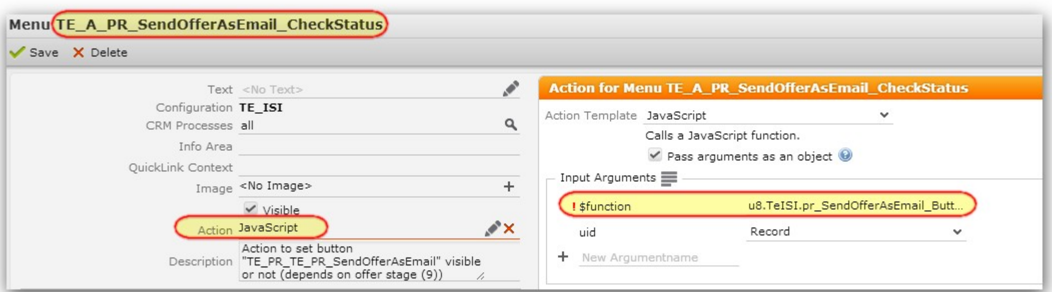
Using the output arguments we are waiting to get the response of the workflow and receive the new offer records uid.

Send Offer as E-mail

New button called “TE_PR_SendOfferAsEmail” to call the new “TE_PR_SendOfferAsEmail” process.

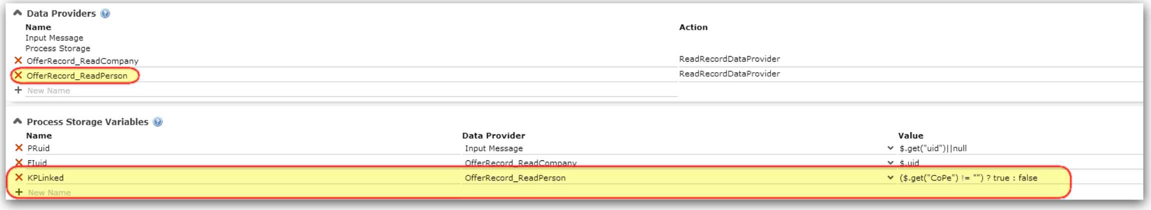


The “TE_PR_SendOfferAsEmail_CheckStatus” query state action is used to set the button active or inactive:



Calling the following function: “pr_SendOfferAsEmail_Button_CheckStatus” (\web\scripts\te.isi\te.isi.js)

By using the “OfferRecord_ReadPerson” data provider we check if a person is linked to the offer or not. If no person is linked then the user has to select one. The selected person will be added to the offer record.



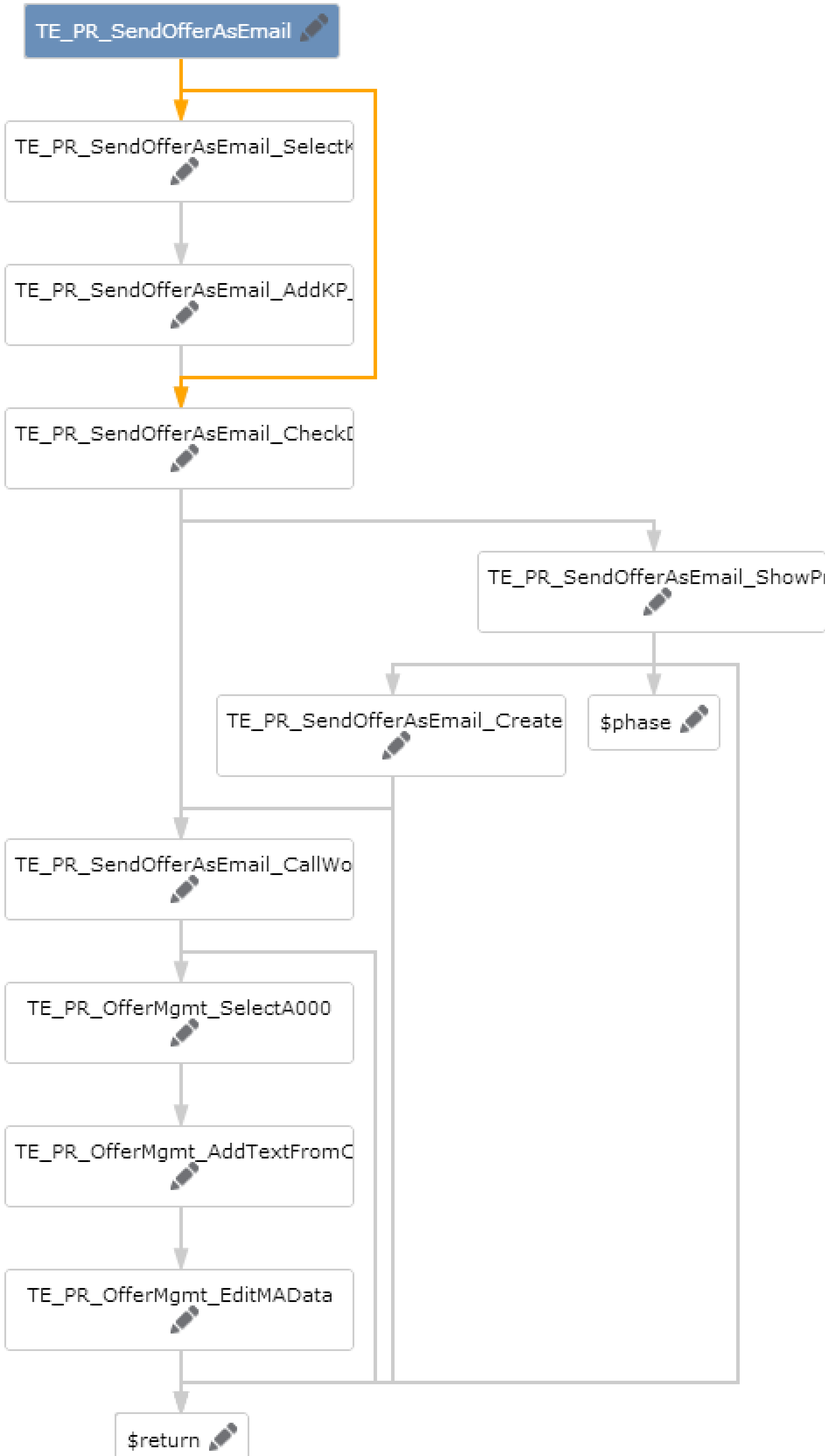
Used process steps:

1. TE_PR_SendOfferAsEmail_CheckLink (initial step)
2. TE_PR_SendOfferAsEmail_SelectKP
3. TE_PR_SendOfferAsEmail_AddKP_ToPR
4. TE_PR_SendOfferAsEmail_CallWorkflow
5. TE_PR_OfferMgmt_SelectA000
6. TE_PR_OfferMgmt_AddTextFromConfigTable
7. TE_PR_OfferMgmt_EditMAData

Used workflows:

- TE_PR_SendOfferAsMail (creates new appointment record (type = e-mail) which is linked to the offer)
- TE_PR_AddPersonToOffer (adds the selected person to the offer record)
- TE_PR_AddTextFromConfigTable (adds a text template to the MA record that was created previously)

For a detailed description see the description field for the process steps. Process overview:

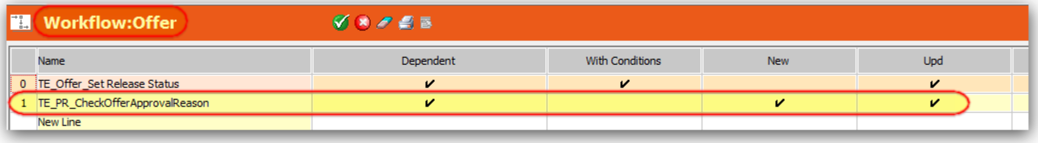

TE_PR_SendOfferAsEmail
TE_PR_SendOfferAsEmail_SelectK
TE_PR_SendOfferAsEmail_AddKP_
TE_PR_SendOfferAsEmail_CheckD
TE_PR_SendOfferAsEmail_ShowPr
TE_PR_SendOfferAsEmail_Create
$phase
TE_PR_SendOfferAsEmail_CallWo
TE_PR_OfferMgmt_SelectA000
TE_PR_OfferMgmt_AddTextFromC
TE_PR_OfferMgmt_EditMAData
$return

Show Offer Approval

The “PR” info area has been extended by 4 new fields:

292	5039	Offer discount too high	y/n			F5039	✔	1
293	5040	Offer Item discount too	y/n			F5040	✔	1
294	5041	Offer sum too high	y/n			F5041	✔	1
295	5042	Offer Item needs apprc	y/n			F5042	✔	1

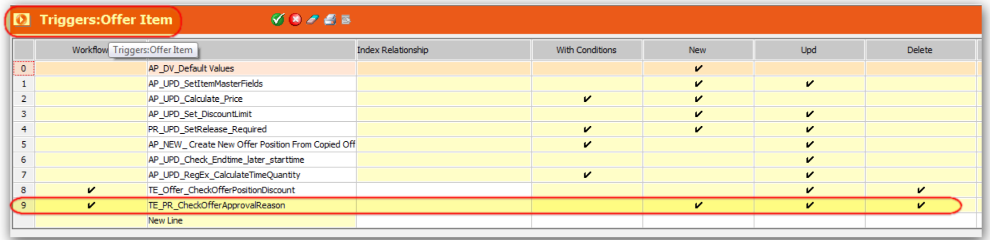
These fields are set by the “TE_PR_CheckOfferApprovalReason” workflow which is called via the “TE_SR Central” station right from two info areas (PR & AP)



Workflow:Offer

	Name	Dependent	With Conditions	New	Upd
0	TE_Offer_Set Release Status	✔	✔		✔
1	TE_PR_CheckOfferApprovalReason	✔		✔	✔
	New Line				

At the “AP” info area the workflow is called in the trigger section because it depends on the triggers which are executed before:



Triggers:Offer Item

	Workflow	Triggers:Offer Item	Index Relationship	With Conditions	New	Upd	Delete
0		AP_DV_Default Values			✔		
1		AP_UPD_SetItemMasterFields			✔	✔	
2		AP_UPD_Calculate_Price		✔	✔		
3		AP_UPD_Set_DiscountLimit			✔	✔	
4		PR_UPD_SetRelease_Required		✔	✔	✔	
5		AP_NEW_ Create New Offer Position From Copied Off		✔		✔	
6		AP_UPD_Check_Endtime_later_starttime				✔	
7		AP_UPD_RegEx_CalculateTimeQuantity		✔		✔	
8	✔	TE_Offer_CheckOfferPositionDiscount				✔	✔
9	✔	TE_PR_CheckOfferApprovalReason			✔	✔	✔
		New Line					

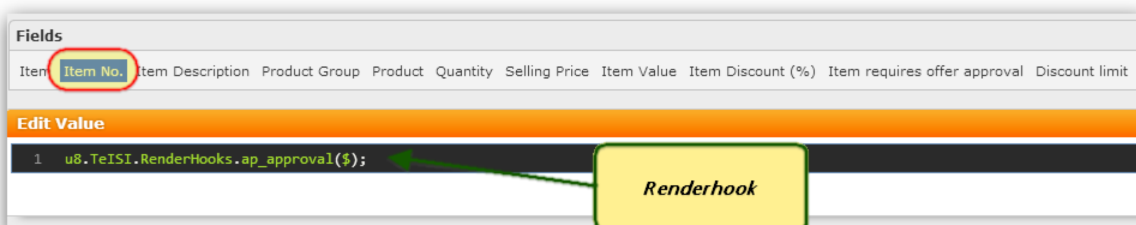
Four new renderhook functions have been developed to mark the dependent fields on the mask:

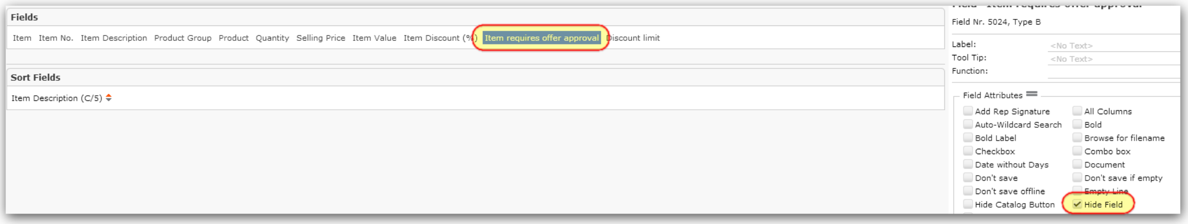
```
/// call: u8.TeISI.RenderHooks.pr_discount($);
/// call: u8.TeISI.RenderHooks.pr_value($);
/// call: u8.TeISI.RenderHooks.ap_discount($);
/// call: u8.TeISI.RenderHooks.ap_approval($);
pr_discount: function (object) {
    var prDiscount = u8.services.typeConverter.toBoolean(object.getValue(5039));
    if(prDiscount == true){
        object.addClass("TextRed");
    }
},
pr_value: function (object) {
    var prValue = u8.services.typeConverter.toBoolean(object.getValue(5041));
    if (prValue == true) {
        object.addClass("TextRed");
    }
},
ap_discount: function (object) {
    var apDiscount = object.getValue(13);
    var apLimit = object.getValue(5007);
    if (apDiscount > apLimit) {
        object.addClass("TextRed");
    }
},
ap_approval: function (object) {
    var apApproval = u8.services.typeConverter.toBoolean(object.getValue(5024));
    if (apApproval == true) {
        object.addClass("TextRed");
    }
}
```

Important: The renderhook functions use special fields which must be available on the mask.

Example:

The field 5024 (“Item requires approval”) is used to color the “ItemNo” field (info area: AP). Therefore, the field 5024 must be available on the mask (in this case hidden).





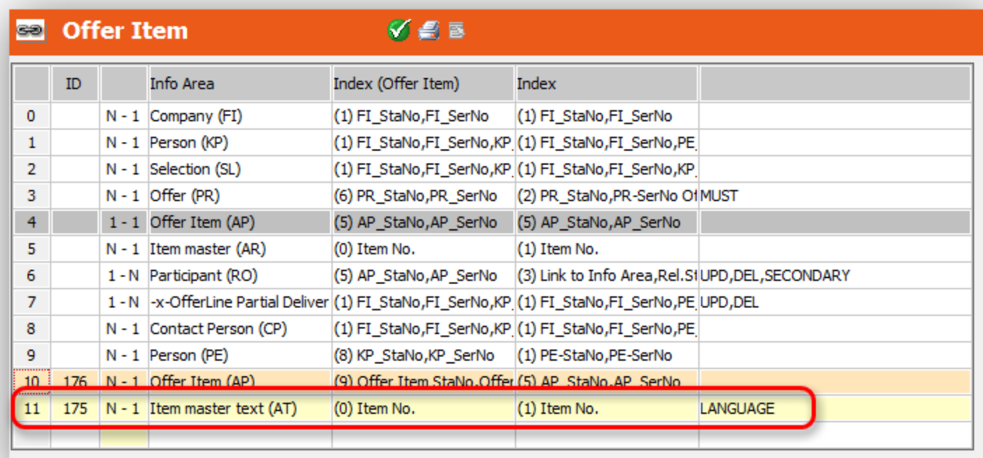
Offer Item core calculations

The configuration parameter Schema.EnableLiveCalculations is enabled in TE_ISI for this info area. So interactive business logic, like setting the price when quantity gets changed, will be active.

Offer Item – Description Field

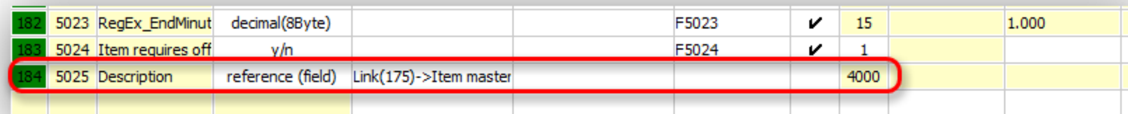
A new link has been added to the "AP" info area.

Linking the "AT" info area allows us to display the description of the linked item master in the respective language.



	ID		Info Area	Index (Offer Item)	Index	
0		N - 1	Company (FI)	(1) FI_StaNo,FI_SerNo	(1) FI_StaNo,FI_SerNo	
1		N - 1	Person (KP)	(1) FI_StaNo,FI_SerNo,KP	(1) FI_StaNo,FI_SerNo,PE	
2		N - 1	Selection (SL)	(1) FI_StaNo,FI_SerNo,KP	(1) FI_StaNo,FI_SerNo,KP	
3		N - 1	Offer (PR)	(6) PR_StaNo,PR_SerNo	(2) PR_StaNo,PR-SerNo O	MUST
4		1 - 1	Offer Item (AP)	(5) AP_StaNo,AP_SerNo	(5) AP_StaNo,AP_SerNo	
5		N - 1	Item master (AR)	(0) Item No.	(1) Item No.	
6		1 - N	Participant (RO)	(5) AP_StaNo,AP_SerNo	(3) Link to Info Area,Rel.S	UPD,DEL,SECONDARY
7		1 - N	-x-OfferLine Partial Deliver	(1) FI_StaNo,FI_SerNo,KP	(1) FI_StaNo,FI_SerNo,PE	UPD,DEL
8		N - 1	Contact Person (CP)	(1) FI_StaNo,FI_SerNo,KP	(1) FI_StaNo,FI_SerNo,PE	
9		N - 1	Person (PE)	(8) KP_StaNo,KP_SerNo	(1) PE-StaNo,PE-SerNo	
10	176	N - 1	Offer Item (AP)	(9) Offer Item StaNo,Offer	(5) AP_StaNo,AP_SerNo	
11	175	N - 1	Item master text (AT)	(0) Item No.	(1) Item No.	LANGUAGE

The following reference field has been added to display the field in an offer item record:

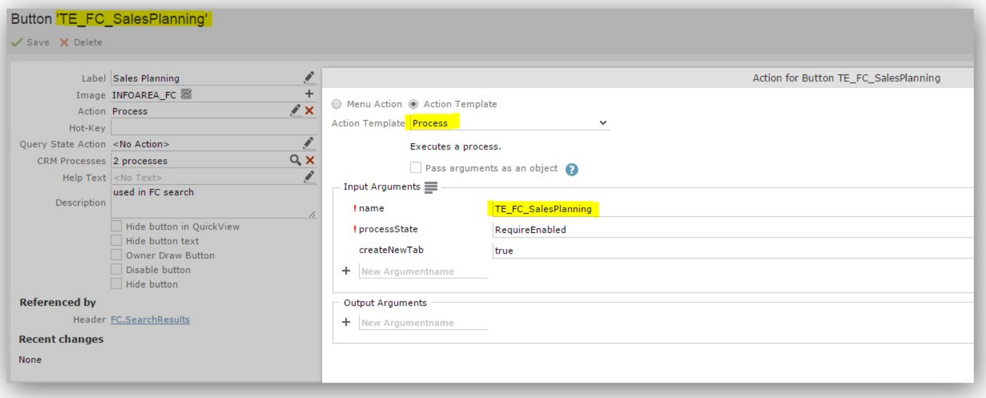


182	5023	RegEx_EndMinut	decimal(8Byte)			F5023	✔	15		1.000
183	5024	Item requires off	y/n			F5024	✔	1		
184	5025	Description	reference (field)	Link(175)->Item master				4000		

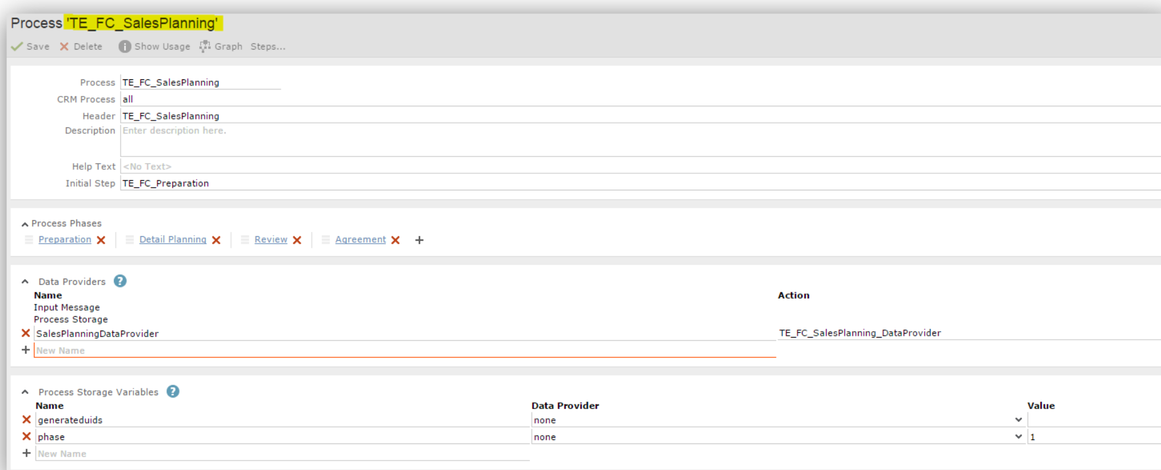
Sales Planning

Learn about the new sales planning process.

A new button has been created to open the new Sales Planning process.

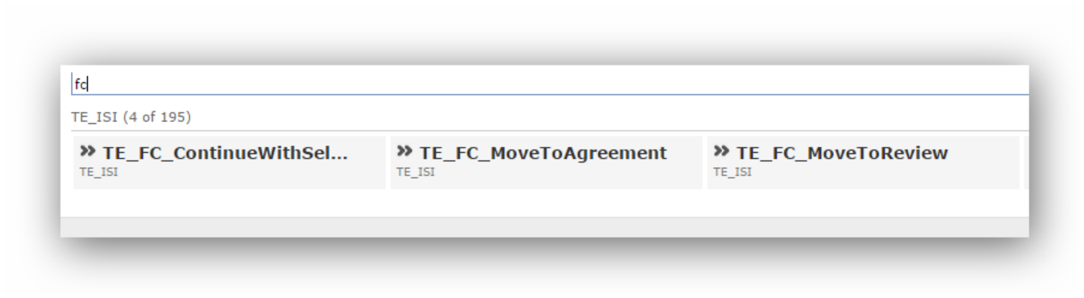


The process contains 4 phases:



The initial step of each phase is used to set the phase active.

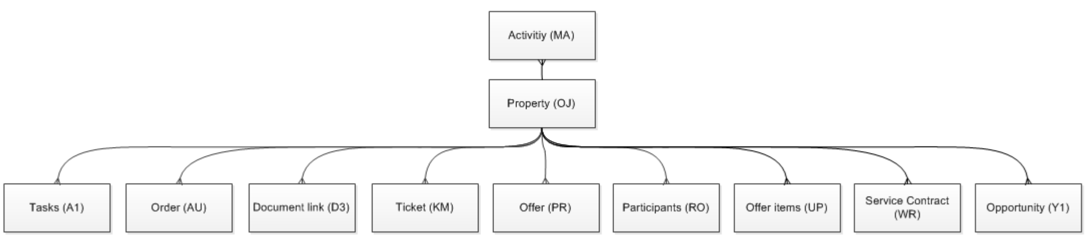
These three buttons are used to change the phase within the process:

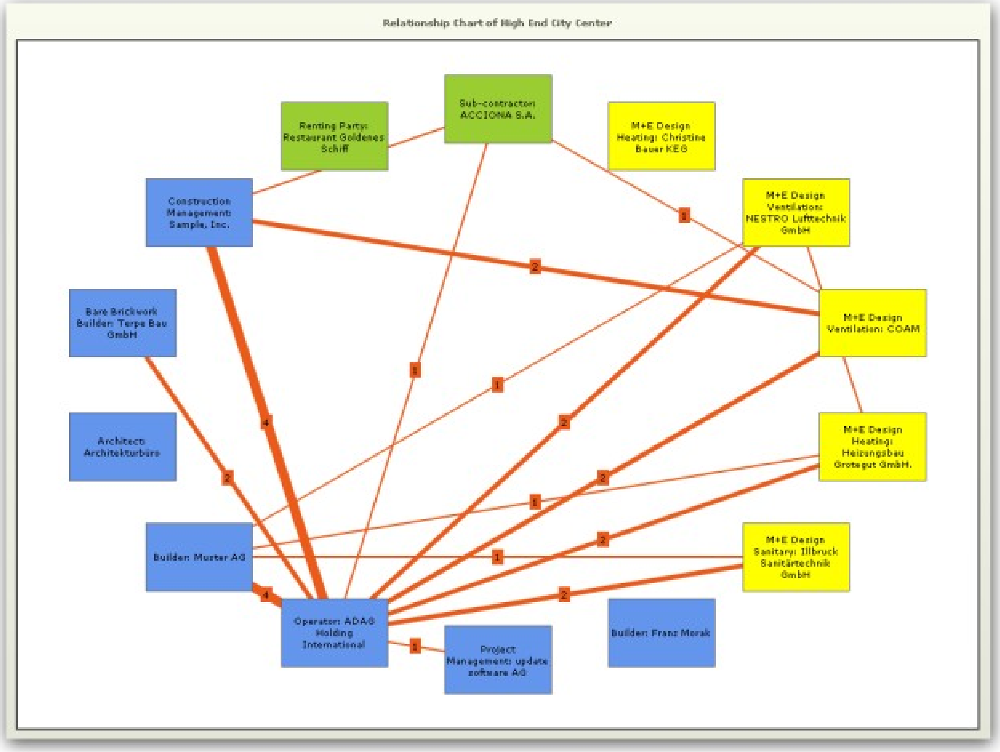


Furthermore a javascript is used to create the records for the next year (step from phase1 to phase2) File location: \web\scripts\te.isi\processes\TE_FC_SalesPlanning.js

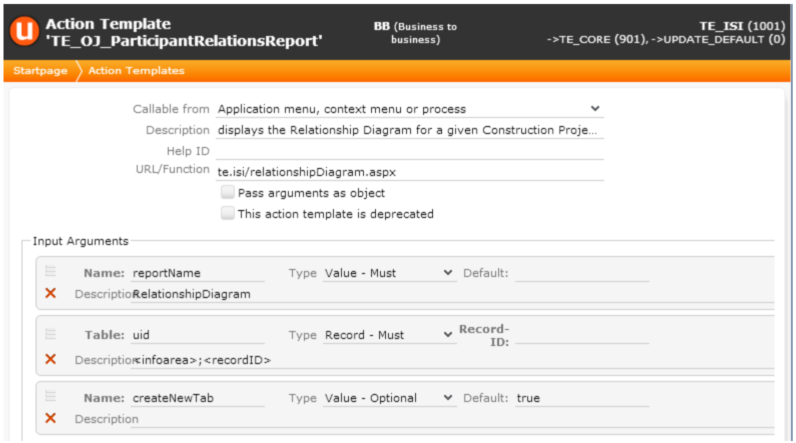
Property

Learn to manage property portfolio and run analysis.





NewTE_OJ_ParticipantRelationsReportpagewhichcallsthe“relationshipDiagram.aspx” file.


Action Template 'TE_OJ_ParticipantRelationsReport' BB (Business to business) TE_ISI (1001) ->TE_CORE (901), ->UPDATE_DEFAULT (0)

Startpage 〉 Action Templates

Callable from: Application menu, context menu or process
Description: displays the Relationship Diagram for a given Construction Proje...
Help ID:
URL/Function: te.isi/relationshipDiagram.aspx
Pass arguments as object
This action template is deprecated

Input Arguments

Name: reportName Type: Value - Must Default:
Description: RelationshipDiagram

Table: uid Type: Record - Must Record-ID:
Description: <infoarea>;<recordID>

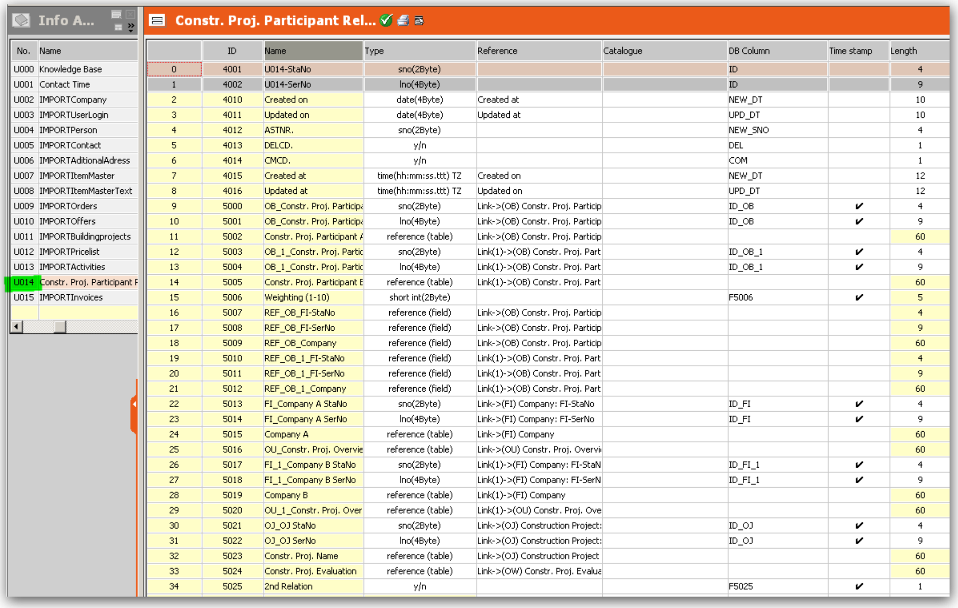
Name: createNewTab Type: Value - Optional Default: true
Description

Data model U014 Link to OB1, OB2 Weighting

Link to FI1, FI2 Link to OJ

2nd relation flag

Reference fields are not used.



No.	Name
U000	Knowledge Base
U001	Contact Time
U002	IMPORTCompany
U003	IMPORTUserLogin
U004	IMPORTPerson
U005	IMPORTContact
U006	IMPORTAditionalAdress
U007	IMPORTItemMaster
U008	IMPORTItemMasterText
U009	IMPORTOrders
U010	IMPORTOffers
U011	IMPORTBuildingprojects
U012	IMPORTPricelist
U013	IMPORTActivities
U014	Constr. Proj. Participant F
U015	IMPORTInvoices

	ID	Name	Type	Reference	Catalogue	DB Column	Time stamp	Length
0	4001	U014-StaNo	sno(2Byte)			ID		4
1	4002	U014-SerNo	lno(4Byte)			ID		9
2	4010	Created on	date(4Byte)	Created at		NEW_DT		10
3	4011	Updated on	date(4Byte)	Updated at		UPD_DT		10
4	4012	ASTNR.	sno(2Byte)			NEW_SNO		4
5	4013	DELCD.	y/n			DEL		1
6	4014	CMCD.	y/n			COM		1
7	4015	Created at	time(hh:mm:ss.ttt) TZ	Created on		NEW_DT		12
8	4016	Updated at	time(hh:mm:ss.ttt) TZ	Updated on		UPD_DT		12
9	5000	OB_Constr. Proj. Participa	sno(2Byte)	Link->(OB) Constr. Proj. Particip		ID_OB	✔	4
10	5001	OB_Constr. Proj. Participa	lno(4Byte)	Link->(OB) Constr. Proj. Particip		ID_OB	✔	9
11	5002	Constr. Proj. Participant A	reference (table)	Link->(OB) Constr. Proj. Particip				60
12	5003	OB_1_Constr. Proj. Partic	sno(2Byte)	Link(1)->(OB) Constr. Proj. Part		ID_OB_1	✔	4
13	5004	OB_1_Constr. Proj. Partic	lno(4Byte)	Link(1)->(OB) Constr. Proj. Part		ID_OB_1	✔	9
14	5005	Constr. Proj. Participant E	reference (table)	Link(1)->(OB) Constr. Proj. Part				60
15	5006	Weighting (1-10)	short int(2Byte)			F5006	✔	5
16	5007	REF_OB_FI-StaNo	reference (field)	Link->(OB) Constr. Proj. Particip				4
17	5008	REF_OB_FI-SerNo	reference (field)	Link->(OB) Constr. Proj. Particip				9
18	5009	REF_OB_Company	reference (field)	Link->(OB) Constr. Proj. Particip				60
19	5010	REF_OB_1_FI-StaNo	reference (field)	Link(1)->(OB) Constr. Proj. Part				4
20	5011	REF_OB_1_FI-SerNo	reference (field)	Link(1)->(OB) Constr. Proj. Part				9
21	5012	REF_OB_1_Company	reference (field)	Link(1)->(OB) Constr. Proj. Part				60
22	5013	FI_Company A StaNo	sno(2Byte)	Link->(FI) Company: FI-StaNo		ID_FI	✔	4
23	5014	FI_Company A SerNo	lno(4Byte)	Link->(FI) Company: FI-SerNo		ID_FI	✔	9
24	5015	Company A	reference (table)	Link->(FI) Company				60
25	5016	OU_Constr. Proj. Overvie	reference (table)	Link->(OU) Constr. Proj. Overvi				60
26	5017	FI_1_Company B StaNo	sno(2Byte)	Link(1)->(FI) Company: FI-StaN		ID_FI_1	✔	4
27	5018	FI_1_Company B SerNo	lno(4Byte)	Link(1)->(FI) Company: FI-SerN		ID_FI_1	✔	9
28	5019	Company B	reference (table)	Link(1)->(FI) Company				60
29	5020	OU_1_Constr. Proj. Over	reference (table)	Link(1)->(OU) Constr. Proj. Ove				60
30	5021	OJ_OJ StaNo	sno(2Byte)	Link->(OJ) Construction Project:		ID_OJ	✔	4
31	5022	OJ_OJ SerNo	lno(4Byte)	Link->(OJ) Construction Project:		ID_OJ	✔	9
32	5023	Constr. Proj. Name	reference (table)	Link->(OJ) Construction Project				60
33	5024	Constr. Proj. Evaluation	reference (table)	Link->(OW) Constr. Proj. Evalua				60
34	5025	2nd Relation	y/n			F5025	✔	1

Use case if a new participant’s construction project record is created:

1. When a new OB record is created, then the “OJ_UPD_DummyOB_IDs” trigger is fired and writes OB-StaNo, OB-SerNo into the dummy fields on OJ.
2. The “OB_UPD_DummyRelationIDs” trigger writes OB-StaNo and OB-SerNo back to the dummy fields for all child OB records.
3. If OBdummy fields are updated, then the“U014_NEW_CreateParticipantRelationship”and “U014_NEW_CreateParticipantRelationship 2nd Relation” triggers are fired and 2 new U014 records are created.

   Trigger creates links to OB1, OB2, FI1, FI2 and OJ. Record 1 (A B) and Record 2 (B A) are created.

   The index prohibits a redundant creation of the same relationship record. OJ-Link is within the index.
4. If the OB record should be deleted, then the related U014 records are deleted as well. “U014_DEL_DeleteRecord_If_OB_WasDeleted_LinkA” “U014_DEL_DeleteRecord_If_OB_WasDeleted_LinkB”.
5. Additional settings:
   a. “relationshipDiagram.aspx” is a newly created PageCall for calling fusion chart reports in update crm.
   b. “relationshipDiagram.aspx” calls the “GetData()”method when the .aspx page is loaded. “FusionCharts.aspx.cs” holds the logic for calling FusionCharts reports. It calls a command which loads the requested data and returns it in an xml string.

c. Get all project participants (OB) which are linked current object (OJ)
d. Generate IDs that are unique to the list (StaNo – SerNo) and create a new participant object with width, height, values
e. Create all relations within this list (A-B, A-C, B-C)
f. Count all relation (U014) records in the database
g. Create XML for fusion charts
h. The XML is handed to a swf file (DragNode.swf) which shows the flash report.
i. Used add-on files for this report:
j. \web\bin\update.Template.Isi.dll – Counting Logic in file "chOBRelationsReport.cs"
k. \web\bin\FusionCharts.dll – Standard DLL for fusion charts diagrams
l. \web\web\te.isi\DragNode.swf – Flash file for fusion charts diagram
m. \web\web\te.isi\ relationshipDiagram.aspx - shows the report (PageCall)

Used triggers:

OJ_UPD_DummyOB_IDs	(OB - NEW): After creating a new OB record, OB-StaNo and OB-SerNo is triggered up into OJ.
OB_UPD_DummyRelationIDs	(OJ – UPD): Follow up trigger of OJ_UPD_DummyOB_IDs -> StaNo, SerNo from the last created OB record are triggered into all OB children.
U014_NEW_CreateParticipantRelationship	(OB – UPD DummyRelation ID): creates a new U014 record. It is a relation record between OB-A and OB-B record.
U014_NEW_CreateParticipantRelationship2nd Relation	(OB – UPD DummyRelation ID): same as above with additional setting for "2nd relation" field true. Access is denied by station right
U014_DEL_DeleteRecord_If_OB_WasDeleted_LinkA	(OB – DEL): Deletes the U014 record on SearchIndex A
U014_DEL_DeleteRecord_If_OB_WasDeleted_LinkB	(OB – DEL): Deletes the U014 record on SearchIndex B

OB_UPD_SetParticipationGroup	(OB – UPD): Sets the “Participation Group” field used for color of OB records in diagram. This is managed by web config parameters.
U014_DEL_DeleteSelfRelations	(U014 – NEW): Deletes U014 relations between OB-A and OB-A if these are created. Background: Use case if a company participates more than once. E.g.: as an architect and builder at the same time.

Used texts: TE_AddOn texts:

5	An error occurred on chOBRelationsReport server channel
6	TE_OJ_OBRelReport
7	Only numeric values are allowed in the external keys of the catalog participation group. Please contact your administrator to change the external keys.
8	A relative value from 0 to 5, which changes the strength of the connectors
9	A name, value-paired collection. Name = Ext. Key of the Participation Group catalog. Value = Hex Code of Color. e.g.: 1,FF0000;2,00FF00;3 etc.
10	Participant relations report of
11	The construction project has no participants

Used Web Config Parameters:

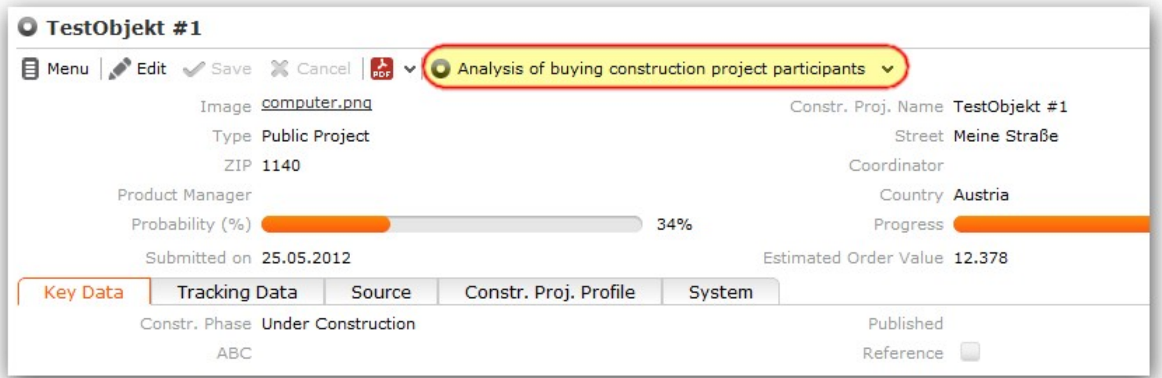
Tab #2: TE_OJ_OBRelReport

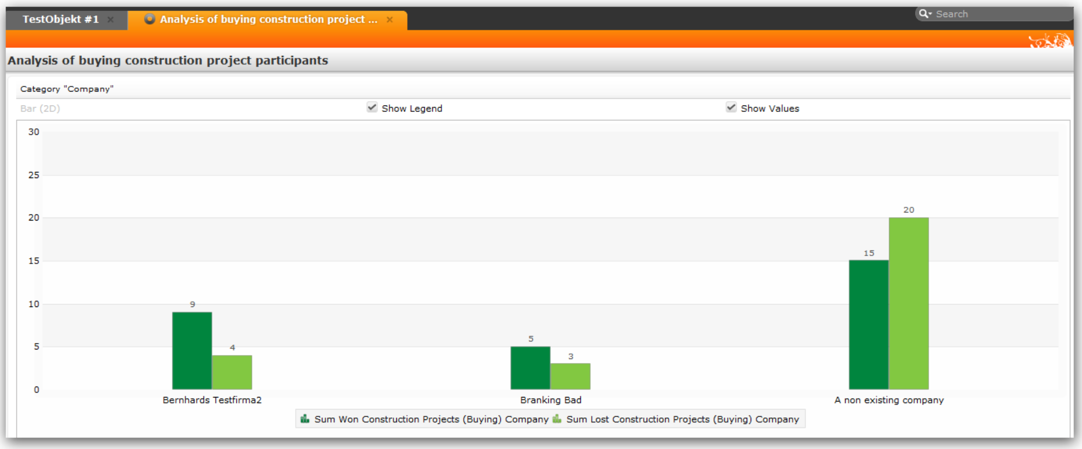
Name	Display Label	Value
TE_OJ_OBRelReport_Height	**Height of the companies in the report:**	70
TE_OJ_OBRelReport_Width	**Width of the companies in the report:**	110
TE_OJ_OBRelReport_GroupColor	**A name,value paired collection. Name = Ext. Key of the Participation Group catalog. Value = Hex Code of Color. e.g: 1,FF0000;2,00FF00;3 etc.:**	1,D3D3D3;2,9ACD32;3,
TE_OJ_OBRelReport_RelInfoArea	**InfoArea shortcut of the relationship records:**	U014
TE_OJ_OBRelReport_RelInfoArea_A_SerNoId	**Field Id of Company A Serial Number:**	5014
TE_OJ_OBRelReport_RelInfoArea_A_StaNoId	**Field Id of Company A Station Number:**	5013
TE_OJ_OBRelReport_RelInfoArea_B_SerNoId	**Field Id of Company B Serial Number:**	5018
TE_OJ_OBRelReport_RelInfoArea_B_StaNoId	**Field Id of Company B Station Number:**	5017
TE_OJ_OBRelReport_ConColor	**HEX-Color of the connection lines:**	EB5A19
TE_OJ_OBRelReport_ConStdStrength	**A relative value from 0 to 5, which changes the strength of the connectors:**	5
TE_OJ_OBRelReport_ParticipantLink	**Link which is executed if user clicks on a participant company in the report. Format: Start with ../MM or ../Framework. Use %RECORDID% in the link, it is a placeholder for the FI RecordId of the Participant:**	../crm/tree.aspx?uid=FI

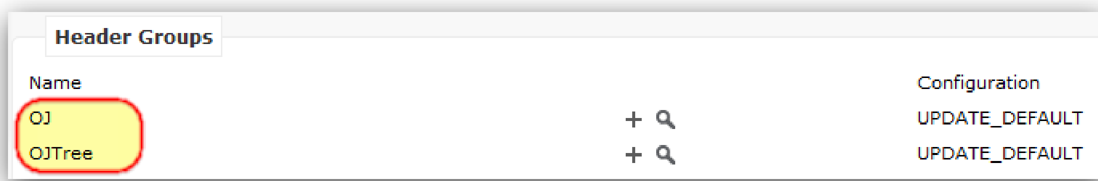
Analysis

Learn about the queries that are used to run analysis.

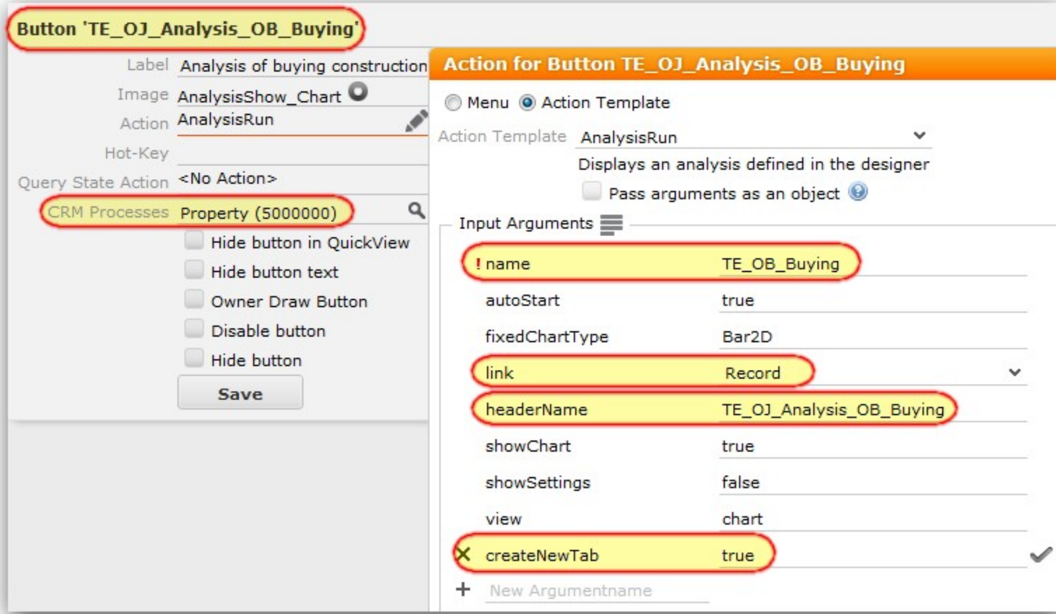
You can find the 2 new analyses in the expand header of a construction project. The 2 buttons have been added to the "OJ" and the "OJTree" header group.



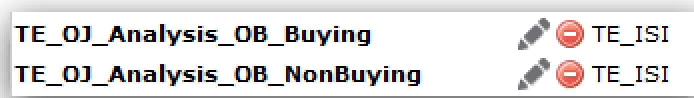


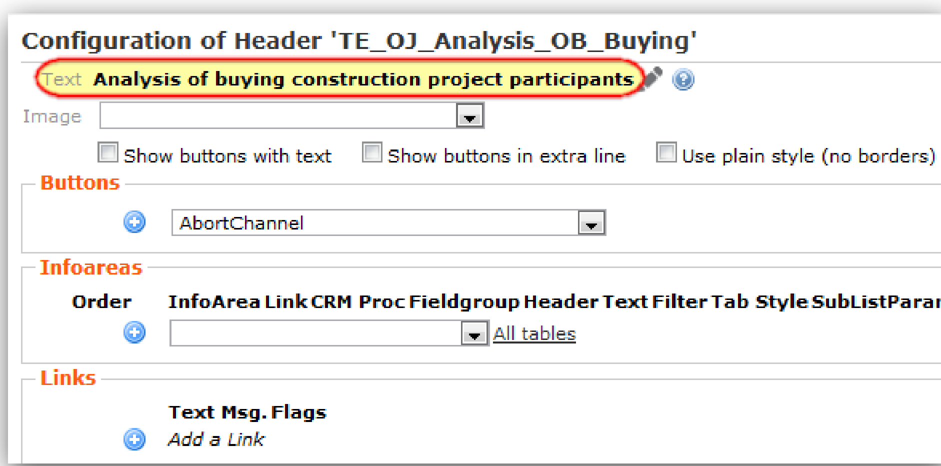


ButtonConfiguration:TE_OJ_Analysis_OB_BuyingTE_OJ_Analysis_OB_NonBuying



Special Headers which are Used:





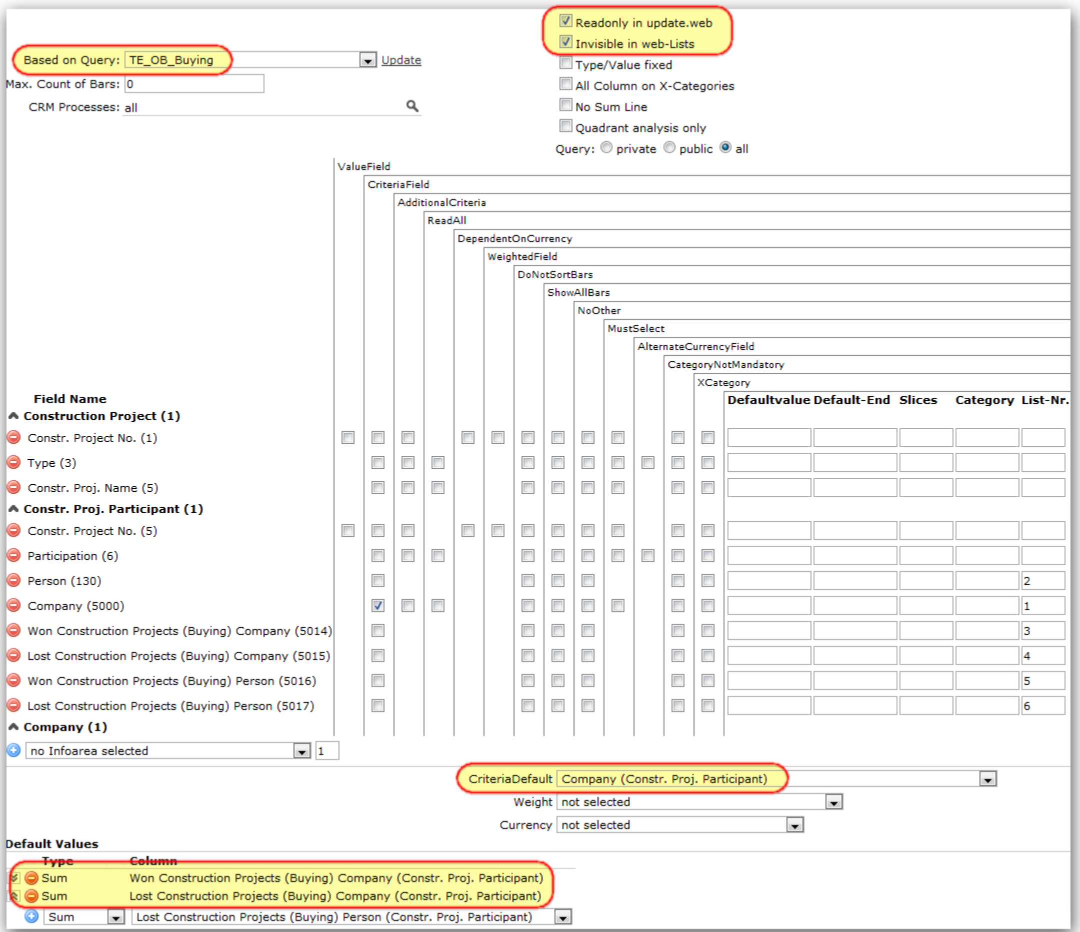
The Queries which are Used to Run the Analysis:

TE_OB_Buying TE_OB_NonBuying

New Analysis Based on the New Queries:

TE_OB_Buying

TE_OB_NonBuying

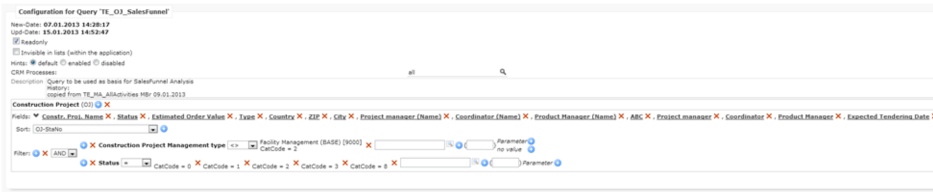


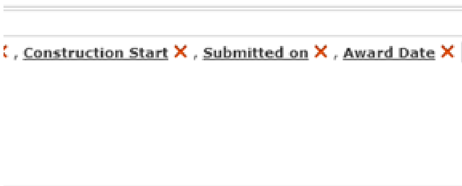
Property Sales Funnel

The sales funnel shall provide an overview of all properties which are not used for property management by status in a funnel view.

The sales funnel works as described below:

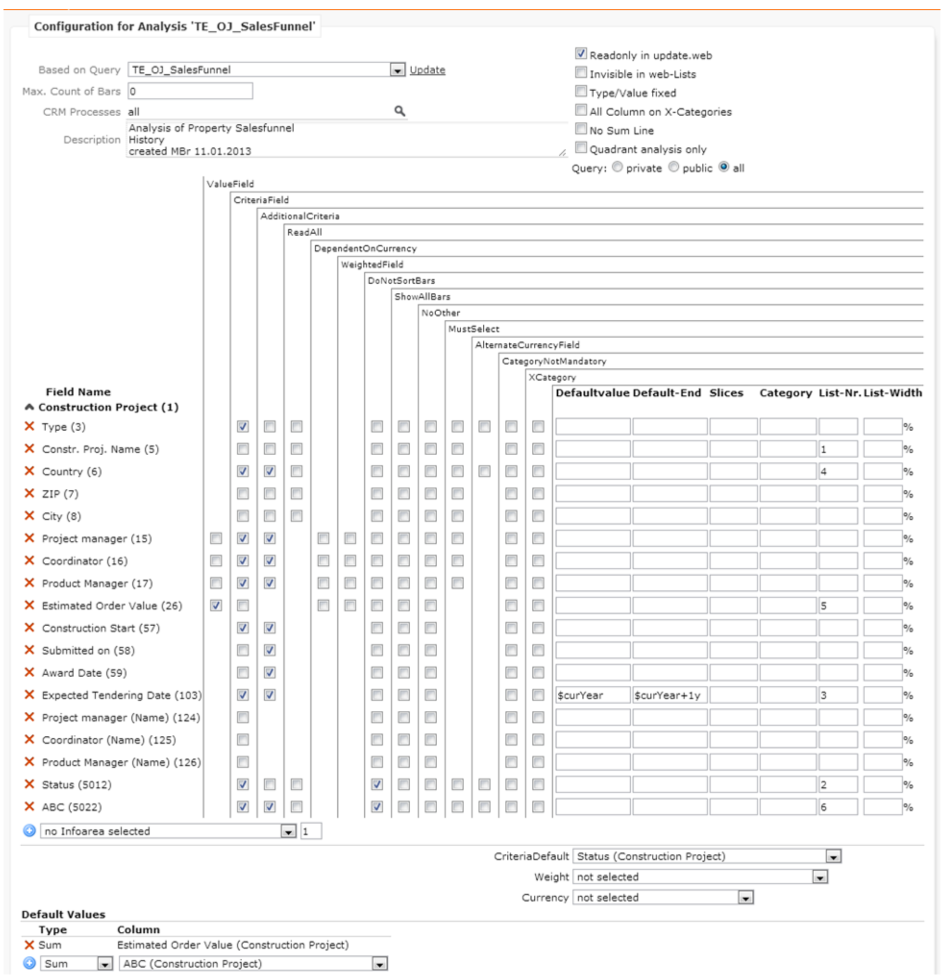
Query: TE_OJ_SalesFunnel





The query provides all fields from the property that might be useful for the analysis. Including the estimated order value and the responsible persons within the organization. Additional tendering / construction start / award and submission dates are provided to enable more filters in the analysis.

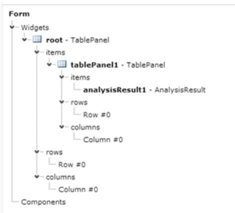
Analysis: TE_OJ_SalesFunnel



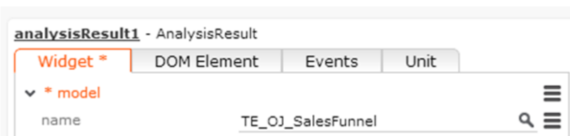
The analysis uses the query above and filters by default by tendering date within the current year. Additional drill-down and filters are provided for the internal reps, the country, the ABC classification and the different dates. The value of the sum of all order values is calculated per status (similar to level in opportunity) by default.

Form: TE_PropertySalesFunnel

Layout of the form:

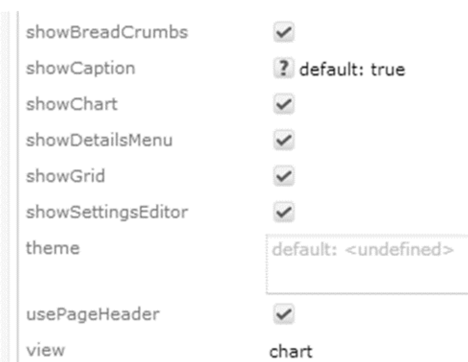


analysisResult1 Configuration:



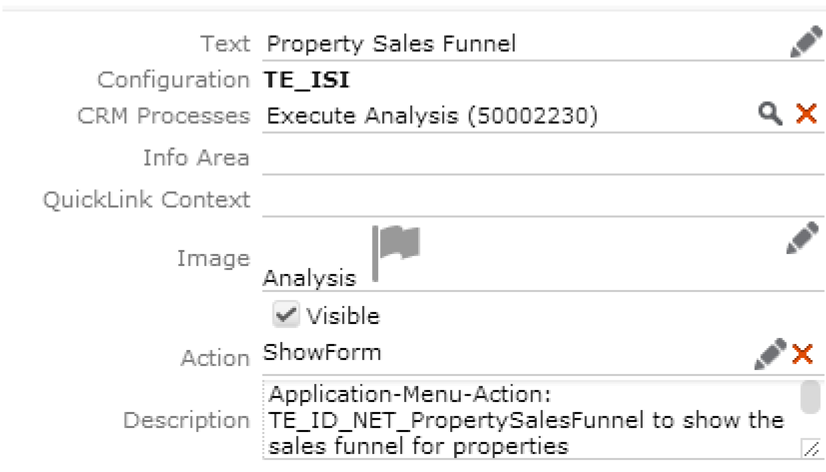
The above defined analysis is called.

By default the funnel is called and cannot be changed. The user sees the legend and the values in the chart view.

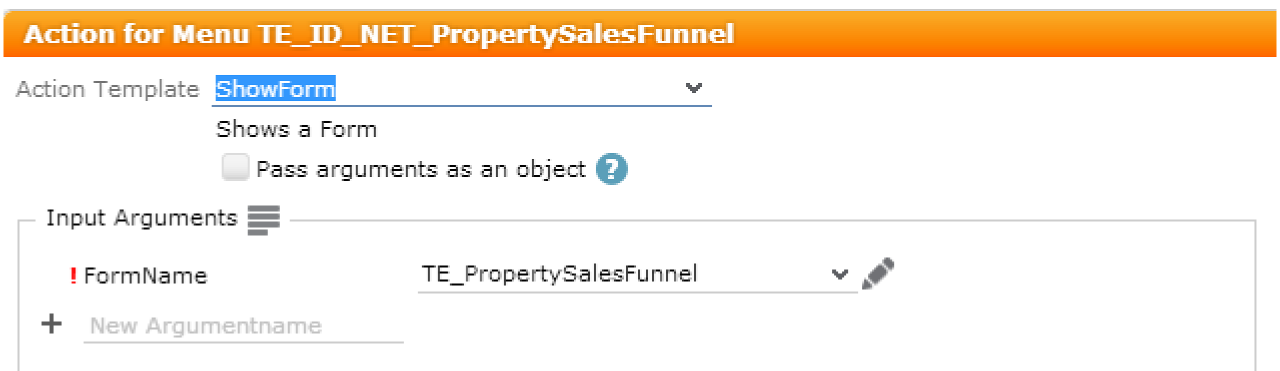


The chart is called by default and the user has the option to change filters and drill-down to record level.

TE_ID_NET_PropertySalesFunnel Application Menu Entry



The entry can be called directly from the "ID_NET_QUERIES_AND_STATISTICS" menu and shows the form that was defined above.



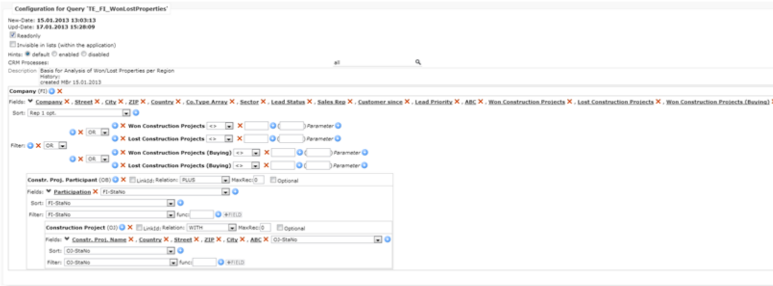
No additional parameters are required.

Won/Lost Properties Non-Buying Participants

This analysis shall give an overview of all companies that have been participating in properties that were marked as won/lost.

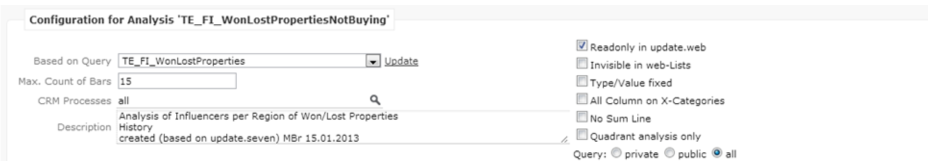
The analysis itself gives a complete overview oo all the participants. From the view the user can directly navigate to the respective company record.

Query: TE_FI_WonLostProperties

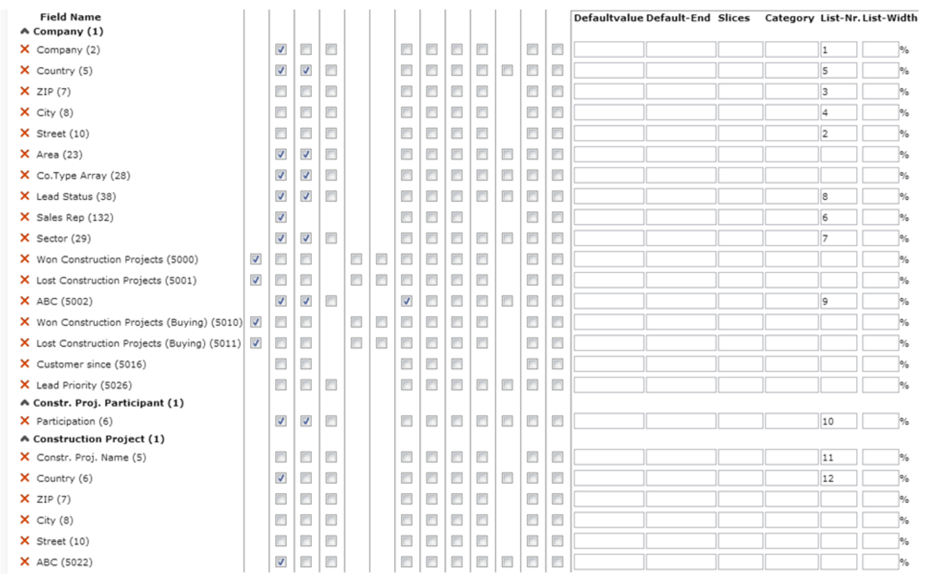


The query selects all required fields from the Company info area. In Addition, the linked property participants and the linked properties are selected to enable a full drill-through to record level.

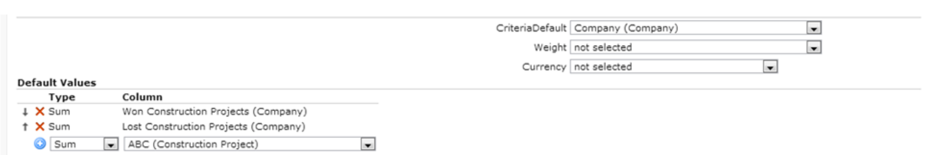
Analysis: TE_FI_WonLostPropertiesNotBuying



The above defined query is called. No special definitions are made.



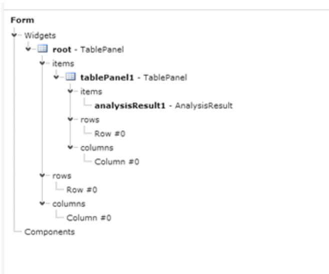
The sorting by ABC is disabled by default, information from FI, OB and OJ act as filter and drill-down possibilities. Information from FI, OB and OJ is used for the list view.



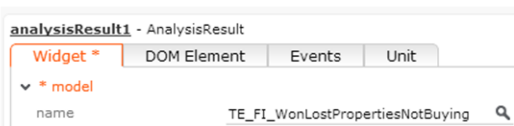
A sum of all won and lost projects per company is provided. The sum is precalculated via a background workflow.

Form: TE_WonLostPropertiesNotBuying

Layout of the form:

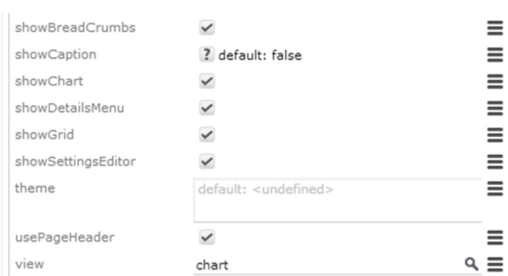


Details definition of analysisResult1:



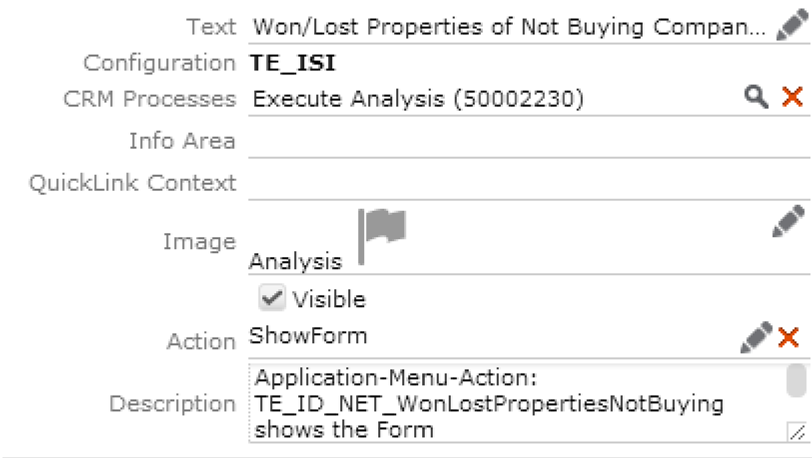
The above defined analysis is called.

The bar3D chart is selected by default. The user cannot change this, legend and values are shown.

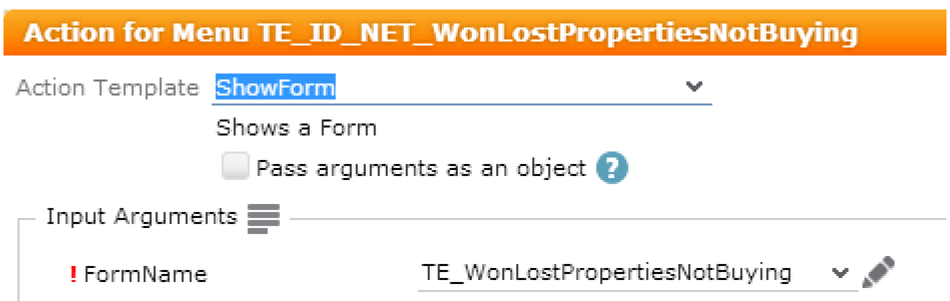


The form starts with the chart view, the user sees the details menu and also has the possibility to switch to grid view.

Application Menu Entry: TE_ID_NET_WonLostPropertiesNotBuying



The entry is directly integrated into the “ID_NET_QUERIES_AND_STATISTICS” application menu and calls the form without any additional parameters:



Property Portfolio

Learn how to configure property protfolio.

Configuration of Portfolio:

Portfolio ABC

Portfolio	ABC	Type	Property portfolio
Text	Property Evaluation		
Max. Points	302,00	Portfolio Configuration	2x2
Max. points (potential)	100,00	Max. points (customer int...	105,00
Potential description	Quantitative	Customer intimacy descri...	Qualitative
Info Area Code	OJ	Field Number	21
Info Area	Property	Field Name	ABC

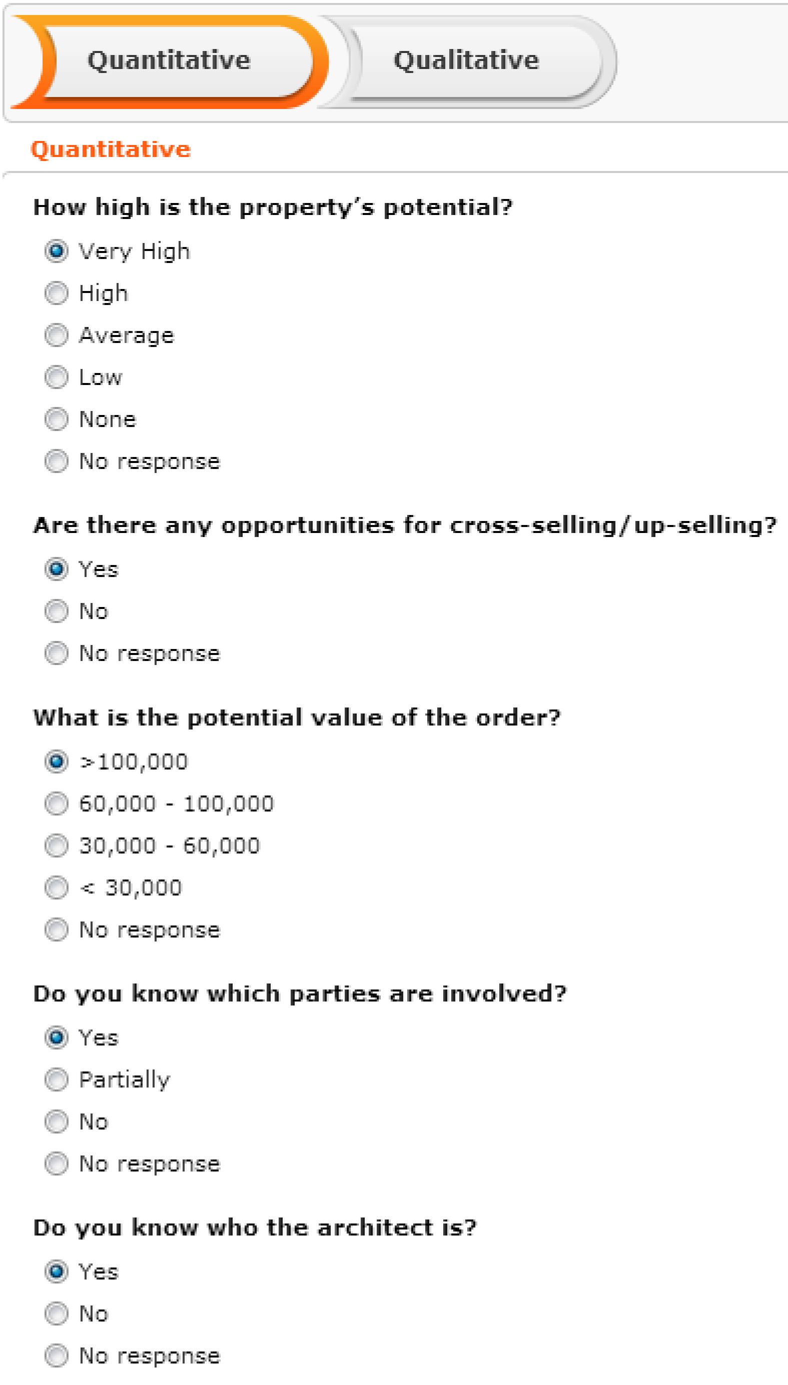
Weighting of Questions:

Search Questions linked to Portfolio ABC

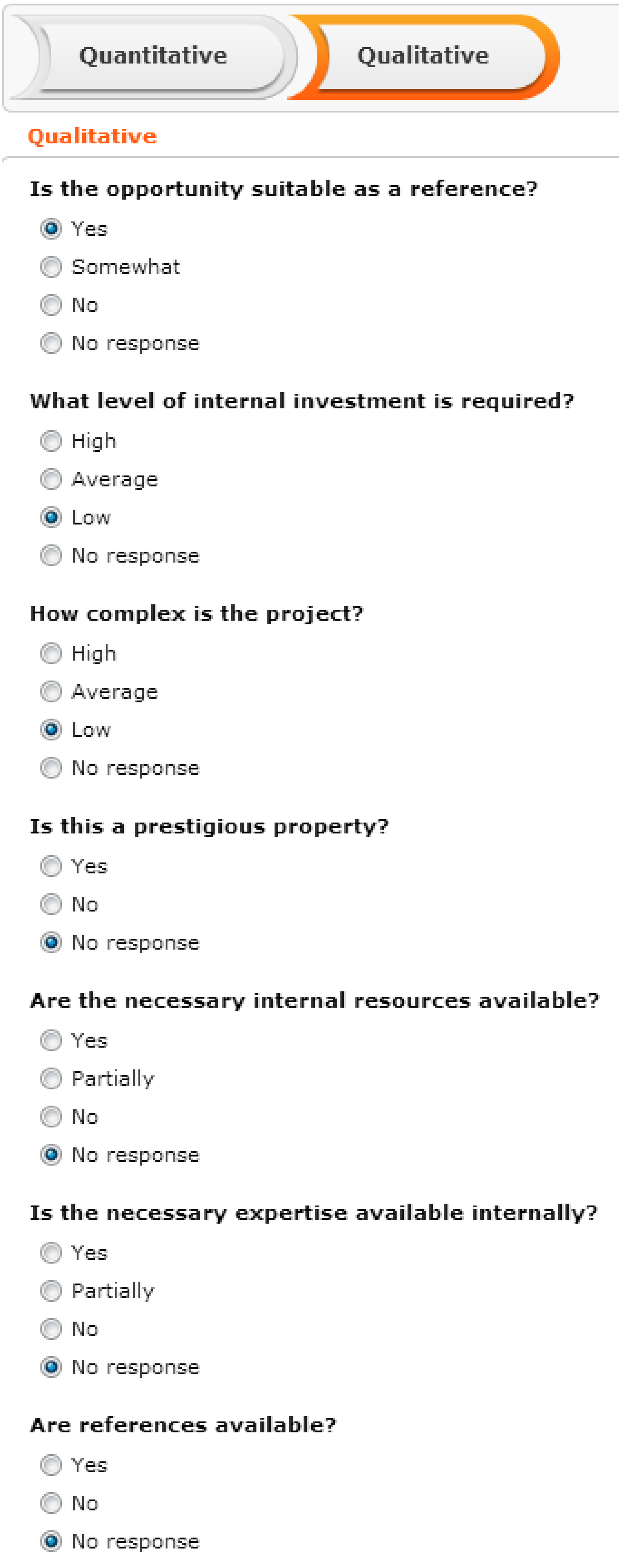
Search Results

(	Question	Portfolio a...	Max. ...	Weighting
1	Quantitative			
2	How high is the property's potential?	Potential	100,00	30,00%
3	Are there any opportunities for cross-selling/up-selling?	Potential	100,00	20,00%
4	What is the potential value of the order?	Potential	100,00	15,00%
5	Do you know which parties are involved?	Potential	100,00	10,00%
6	Do you know who the architect is?	Potential	100,00	25,00%
7	Qualitative			
8	Is the opportunity suitable as a reference?	Customer intim...	100,00	15,00%
9	What level of internal investment is required?	Customer intim...	100,00	20,00%
10	How complex is the project?	Customer intim...	100,00	20,00%
11	Is this a prestigious property?	Customer intim...	100,00	15,00%
12	Are the necessary internal resources available?	Customer intim...	100,00	15,00%
13	Is the necessary expertise available internally?	Customer intim...	100,00	10,00%
14	Are references available?	Customer intim...	100,00	10,00%

Section 1: Quantitative Questions/Answers :

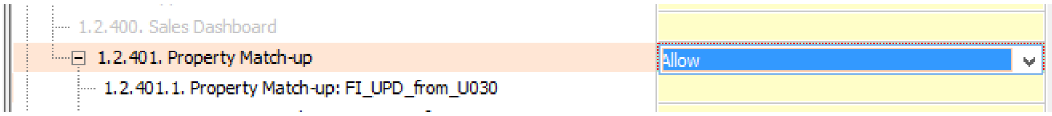

Quantitative
Qualitative
Quantitative
How high is the property's potential?
Very High
High
Average
Low
None
No response
Are there any opportunities for cross-selling/up-selling?
Yes
No
No response
What is the potential value of the order?
>100,000
60,000 - 100,000
30,000 - 60,000
< 30,000
No response
Do you know which parties are involved?
Yes
Partially
No
No response
Do you know who the architect is?
Yes
No
No response

Section 2: Qulitative Questions/Answers :


Quantitative
Qualitative
Qualitative
Is the opportunity suitable as a reference?
Yes
Somewhat
No
No response
What level of internal investment is required?
High
Average
Low
No response
How complex is the project?
High
Average
Low
No response
Is this a prestigious property?
Yes
No
No response
Are the necessary internal resources available?
Yes
Partially
No
No response
Is the necessary expertise available internally?
Yes
Partially
No
No response
Are references available?
Yes
No
No response

Property Match-up

Learn about the property match-up portfolio.



Please note that the “Property Match-up” CRM process is disabled by default in “TE_ProcessConfiguration_Global”. You need to allow it in your login role in which you want to use the property match-up:

Data Model

Three new info areas have been added which are used to import the IBau property data into:

- U029 – imported projects data
- U030 – imported participants data
- U031 – imported participation data

U031 is the junction table between U029 and U030 (the same way as OB is the junction table to OJ and FI)

Import Formats

The following Import formats are used to import into the new info areas:

- TE_IMP_IBAU_Project_Data
- TE_IMP_IBAU_Project_Participant_01: Participation (pos 20, Bauherr, Builder)
- TE_IMP_IBAU_Project_Participant_02:Participation(pos27,Bauträger,Developer)
- TE_IMP_IBAU_Project_Participant_03: Participation (pos 34, Zuständige Behörde, Responsible Administration)
- TE_IMP_IBAU_Project_Participant_04: Participation (pos 41, Planung, Product Engineer)
- TE_IMP_IBAU_Project_Participant_05:Participation(pos48,Generalunternehmer, Main Contractor)
- TE_IMP_IBAU_Project_Participant_06: Participation (pos 55, Ausschreibung, Tenderee)
- TE_IMP_IBAU_Project_Participant_07: Participation (pos 62, Projektsteuerung, Project Management)
- TE_IMP_IBAU_Project_Participant_08: Participation (pos 69, Bauleitung, Construction Management)
- TE_IMP_IBAU_Project_Participant_09: Participation (pos 76, Statik, Structural Engineer)
- TE_IMP_IBAU_Project_Participant_10: Participation (pos 83, Fachplanung Heizung, M+E Design Heating)
- TE_IMP_IBAU_Project_Participant_11: Participation (pos 90, Fachplanung Sanitär, M+E Design Sanitary)
- TE_IMP_IBAU_Project_Participant_12: Participation (pos 97, Fachplanung Klima, M+E Design Air Conditioning)
- TE_IMP_IBAU_Project_Participant_13: Participation (pos 104, Fachplanung Lüftung, M+E Design Ventilation)
- TE_IMP_IBAU_Project_Participant_14: Participation (pos 111, Fachplanung Elektro, M+E Design Electric)

TE_IMP_IBAU_Project_Participant_15: Participation (pos 118, Rohbauunternehmen, Bare Brickwork Builder) In the participation import formats, you can see which type of participation is set in the brackets.

Right and Triggers

Triggers for imported participants data:

	Workflow	Name	Index Relationship	With Condition	New	Upd	Delete	Old Conditior	Upd Fields	Properties
0		FI_UPD_from_U030				✔				✔
		New Line								

- FI_UPD_from_U030: If an imported U030 has been updated (e.g. because of an import) and is linked to an FI, then the FI is also updated if the “Update Imported Participant” field is set to true.

Triggers for imported property data:

	Workflow	Name	Index Relationship	With Conditior	New	Upd	Delete	Old Condition	Upd Fields	Properties
0		OJ _UPD_from_U029				✔				✔
1		OJ_UPD_new_Participant_U031_no		✔		✔				✔
2		OJ_UPD_new_Participant_U031_yes		✔		✔				✔
		New Line								

- OJ_UPD_from_U029: If an imported U029 has been updated (e.g. because of an import) and is linked to an OJ record, then the OJ record is also updated if the “Update Imported Property” field (this field is set true for OJ if you transfer it to the property match-up) is set to true.
- OJ_UPD_new_Participant U031_no: used to trigger the “new participant” field from the imported participant into the linked property.
- OJ_UPD_new_Participant U031_yes: used to trigger the “new participant” field from the imported participant into the linked property.
- U029_UPD_reject: this trigger is only called from web and sets the status of the imported property to rejected.
- U029_UPD_reset_new_Participant: this trigger is only called from web and sets the “new imported participant” field to false, so that it is not highlighted anymore in the property match-up.

Triggers for Imported Participation Data:

	Workflow	Name	Index Relationship	With Conditior	New	Upd	Delete	Old Conditior	Upd Fields	Properties
0		U029_UPD_new_Participant_U031			✔					✔
		New Line								

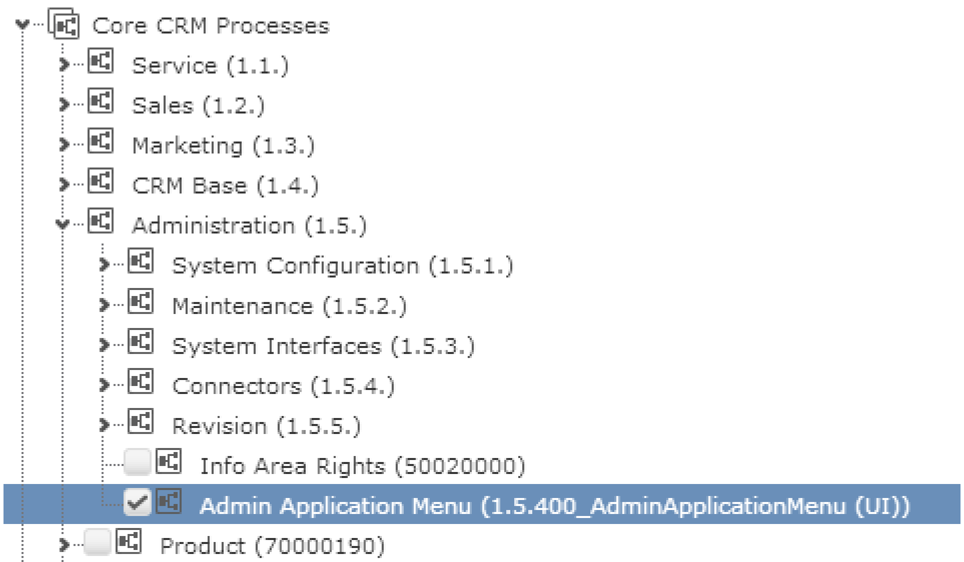
- U029_UPD_new_Participant_U031: set the “new participant” field to true on the imported property if a new participant has been imported. This field is also triggered into the linked property if one is linked.
- U031_UPD_set_created: this trigger is only called from web and sets the created field to true, if the imported participation record has been created as an OB record.

Designer Configuration

Designer configuration for property match-up.

Application Menu

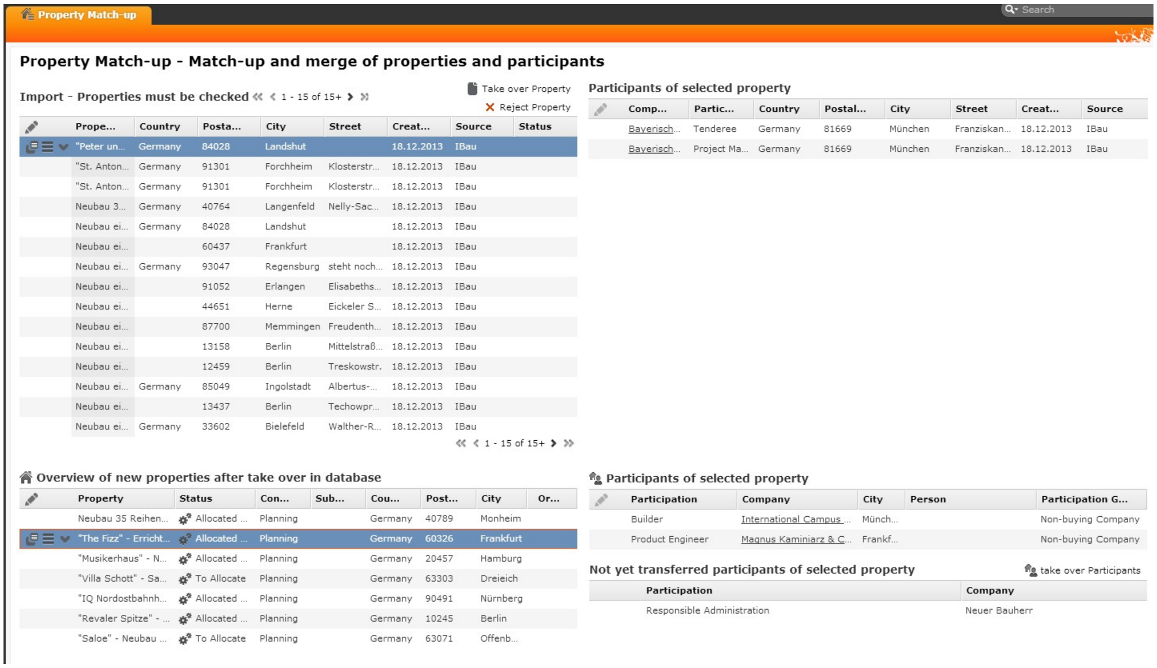
The following entries are available for the property match-up:



The first entry shows the property match-up form, the other three entries show the associated info areas. Note: the last three entries are only available for admins with the “Admin Application Menu” process.

Form

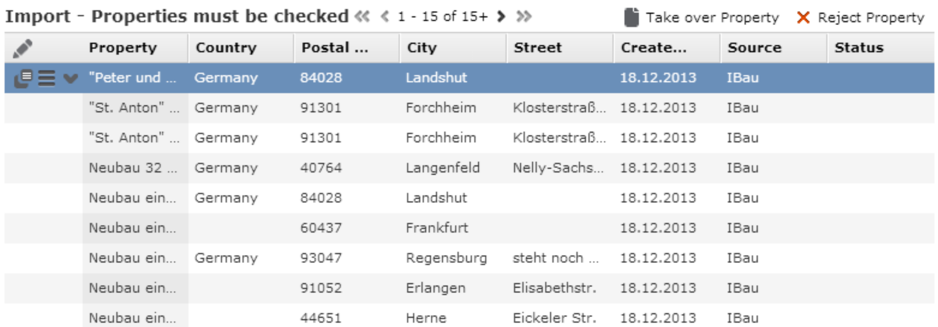
The main component of the property match-up is the form:



Please note that the right part of the form consists of the imported records. If a user should not be a able to open these record in expanded view (where he could edit the record, e.g. the expanded view should only be available to an admin) please disable it for normal users.

The form consists of four main parts:

- The top left part of the form contains all imported properties (U029), you can also take over or reject imported properties


Import - Properties must be checked « ‹ 1 - 15 of 15+ › » Take over Property Reject Property

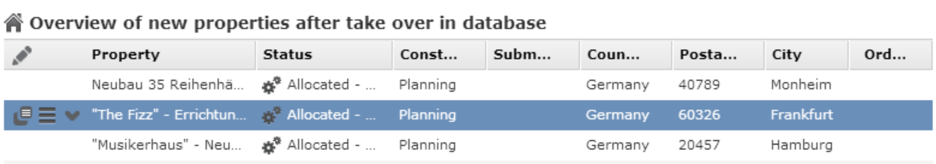
Property	Country	Postal ...	City	Street	Create...	Source	Status
"Peter und ...	Germany	84028	Landshut		18.12.2013	IBau	
"St. Anton" ...	Germany	91301	Forchheim	Klosterstraß...	18.12.2013	IBau	
"St. Anton" ...	Germany	91301	Forchheim	Klosterstraß...	18.12.2013	IBau	
Neubau 32 ...	Germany	40764	Langenfeld	Nelly-Sachs...	18.12.2013	IBau	
Neubau ein...	Germany	84028	Landshut		18.12.2013	IBau	
Neubau ein...		60437	Frankfurt		18.12.2013	IBau	
Neubau ein...	Germany	93047	Regensburg	steht noch ...	18.12.2013	IBau	
Neubau ein...		91052	Erlangen	Elisabethstr.	18.12.2013	IBau	
Neubau ein...		44651	Herne	Eickeler Str.	18.12.2013	IBau	

- The top right part of the form contains all imported Participants (U030), which are linked to the selected imported properties


Participants of selected property

Company	Particip...	Country	Postal ...	City	Street	Created...	Source
Bayerische ...	Tenderee	Germany	81669	München	Franziskane...	18.12.2013	IBau
Bayerische ...	Project Man...	Germany	81669	München	Franziskane...	18.12.2013	IBau

- The bottom left part contains all Properties (OJ) which are linked to an imported Property (U029)


Overview of new properties after take over in database

Property	Status	Const...	Subm...	Coun...	Posta...	City	Ord...
Neubau 35 Reihenhä...	Allocated - ...	Planning		Germany	40789	Monheim	
"The Fizz" - Errichtun...	Allocated - ...	Planning		Germany	60326	Frankfurt	
"Musikerhaus" - Neu...	Allocated - ...	Planning		Germany	20457	Hamburg	

If a new participant has been imported and the imported property has been linked to an OJ, then the record is highlighted in this list:

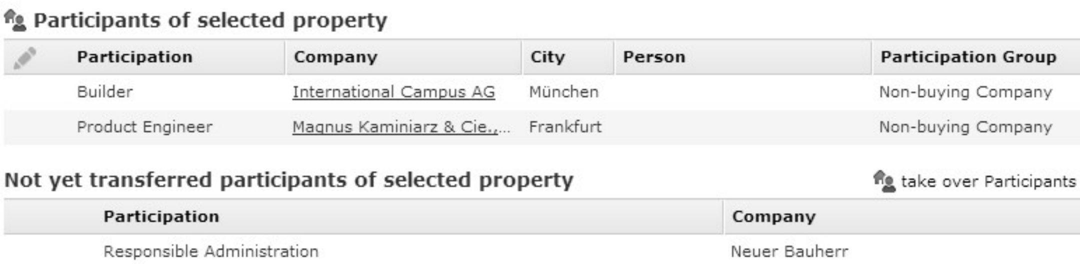

Overview of new properties after take over in database

Property	Status	Constr. ...	S
"IQ Nordostbahnhof" ...	To Allocate	Planning	
Neubau eines Mehrfamilie...	To Allocate	Planning	

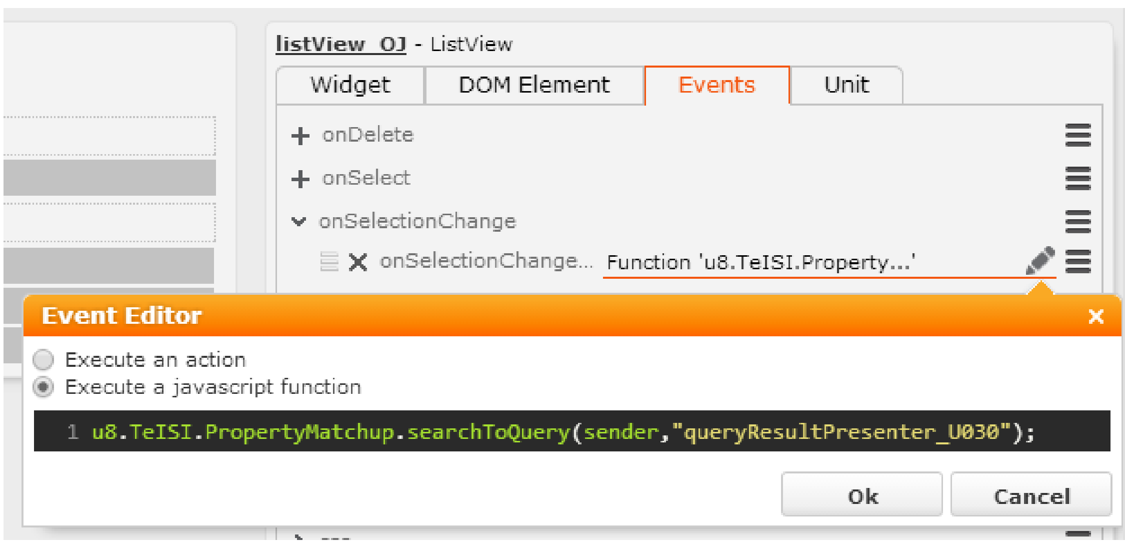
This is done with the u8.TelSI.RenderHooks.oj_newParticipant_list($);function in the isirenderhooks.js.

The Property is no longer highlighted after a participant has been created in this property (last step in the TE_U029_check_Participants process).

- The bottom right part contains the linked participants to the selected OJ, the top list contains participants (FI), the bottom list contains not yet transferred participants (U030), you can also take over participants from here



The only complex component of the form is the bottom right list (participants that are not yet transferred to the selected property). This is in reality a query result presenter which is updated when the selection is changed in the OJ list view:



This javascript function gets the currently selected item from the OJ list, and executes the query result presenter with the selected OJ as a link. All functions for the property match-up can be found in the isipropertymatchup.js.

Note: this query result presenter uses a special TE_U031_Property_Match-up_OJ header to show the button for the process.

Processes

Please note that the match-up dialog, that pops up if a matching company or property has been found has been changed to core, as it provides a better logic for match-up.

The following configuration settings are used for the Match-up:

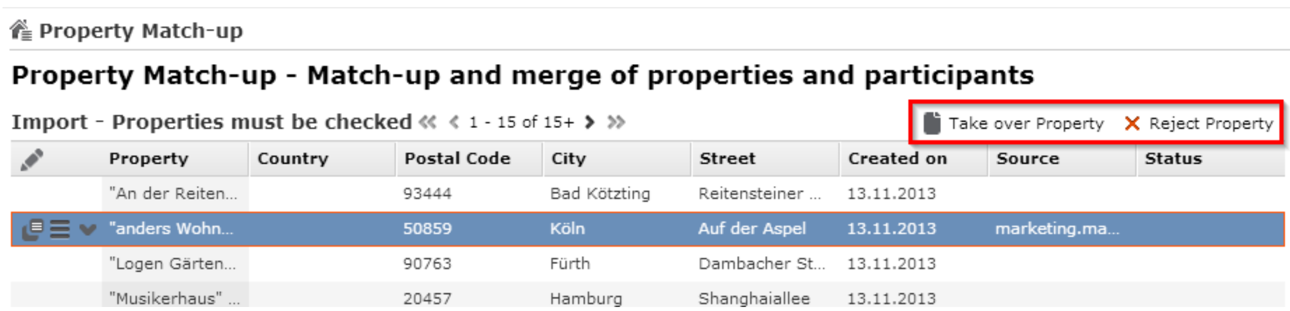
External match-up	Parameter for server modules	table=OJ;mode=adr
External match-up	Parameter for server modules	table=KP;mode=nam
External match-up	Parameter for server modules	table=FI;mode=ide,adr

You can change this behavior with the Web Configuration ‘Matchup.BusinessLogic’.

If you want to change the options of the Match-up or implement your own options, please have a look at this wiki article: Project-Specific Match-Up Configuration

There are three processes used for the property match-up:

- TE_U029_reject, called from TE_A_U029_reject menu action
- TE_U029_take_over, called from TE_A_U029_take_over menu action
- TE_U029_check_Participants, called from jscript action check_U030_process, which is called from TE_U029_check_Participants button



TE_U029_reject

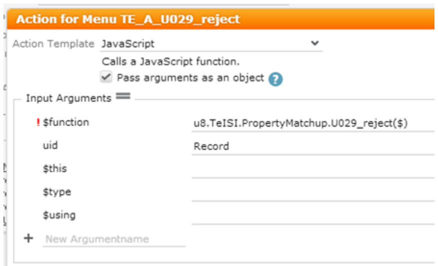
This process is used to reject an imported property, so that it is no longer displayed in the property match-up.

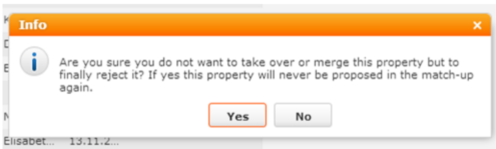
The process shows the imported property in a read-only mask where ‘Reason for rejection’ fields are available.

Once the imported property is set it is set to rejected and the user is taken back to the property match-up.

Alternatively you can also only show a pop-up dialog to confirm that you want to reject the property (if you do not need a rejection reason). To use this dialog please changethe ‘TE_A_U029_reject’ action to javascript und use the following function:

```
u8.TeISI.PropertyMatchup.U029_reject($)
```





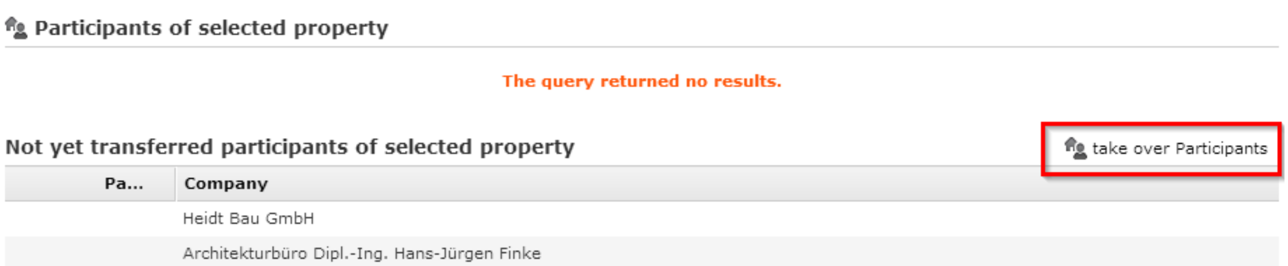
TE_U029_take_over

This process is used to create a property (OJ info area) from an imported property (U029 info area).

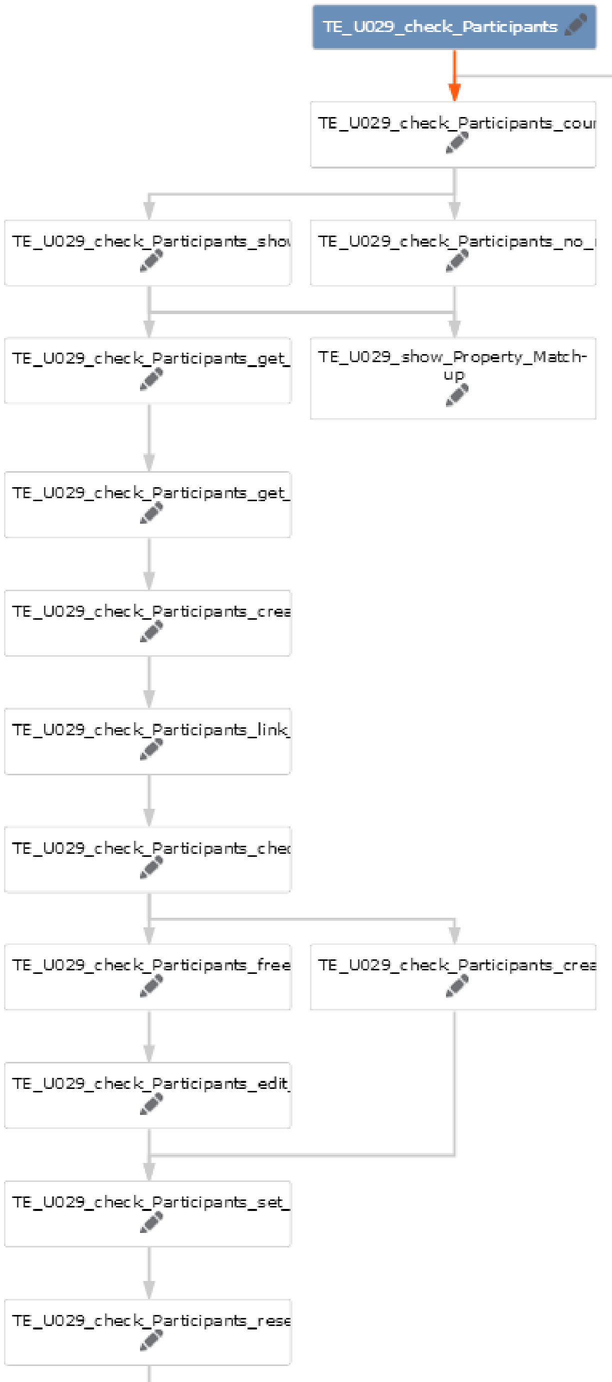
Firstly, a new expanded property mask is shown where all fields which are also present in the imported property are prefilled. Once the the record is saved or an already existing property in the database selected using the Match-up dialog box, the OJ record is linked to the imported property.

The process then checks if imported participants are linked to the imported property. If imported participants are available, the user will get to the next TE_U029_check_Participants process. If no imported participants are available, the user returns to the property match-up form.

TE_U029_check_Participants



Note that this process can only be called from the check_U030_process jscript function as the OJ record is in a different format than needed. If you want to call the process from a different process, please make sure that a valid OJ record is in the process storage variable ‘OJ’ and use the ‘TE_U029_check_Participants_count’ step as your entry point for this process (the same was done in the TE_U029_take_over process after the TE_U029_take_over_check_Participants) step.



The process first checks if imported participants are linked to the imported Property, starting from the selected Property. If no imported participants are available then the user is returned to the property match-up. If imported participants are available then the user is presented with a list of imported participants which are linked to the imported property.

Once an imported participant is selected the process gets all necessary details which are linked to the imported participant.

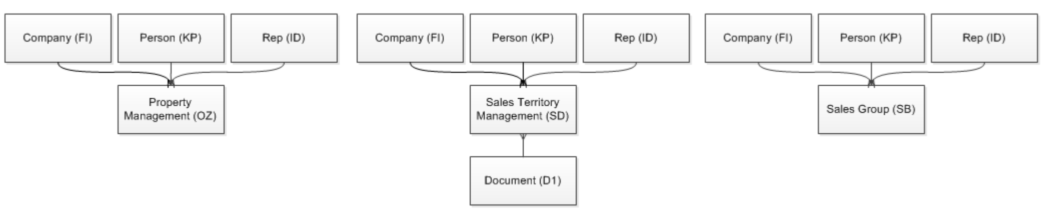
The user is then presented with a new FI mask, the data is copied from the imported participant. After saving the FI record, or selecting an already existing FI record using the match-up dialog box, the FI record is linked to the imported participant record.

The only thing this process now needs to do is to create a participation record (OB) between the FI and OJ record (with the information from the imported participation record). The process checks if an OB record already exists between the provided FI and OJ record (because OB records can only be created once for a given FI and OJ record). If there is no OB record, then the process creates a new OB record in the background (with the information from the imported participation record) and continues the process. If the process found an OB record (exactly one), then the found OB record is edited using the value from the imported participation record. So if the OB record had one participation selected, it now has two participations between the FI and OJ. The process then sets the imported participation record to “created”, so that it is no longer shown in the property match-up and a trigger is called to set the “New Imported Participant” field in the imported property to

“false”, so that it is no longer highlighted in the property match-up.

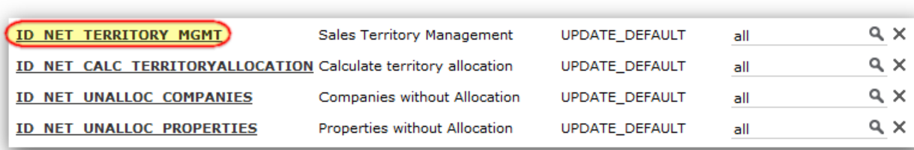
Territory Management(CRM 70001000)

Learn about the info areas that has been customized for territory management.

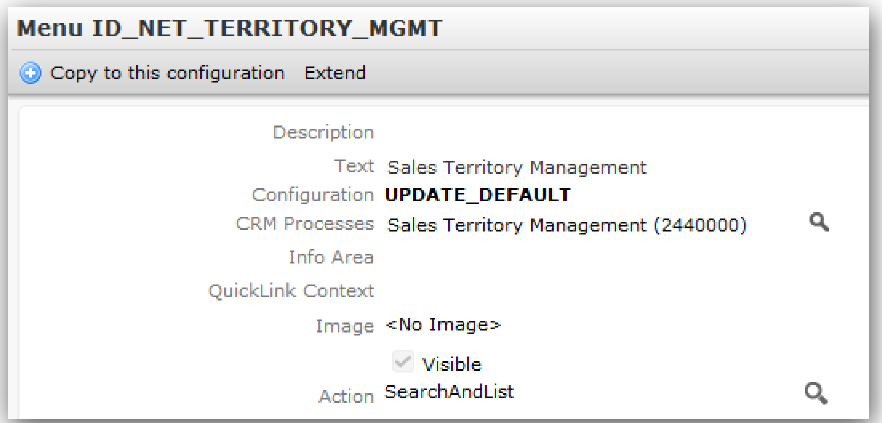


Info areas which have been customized for territory management:

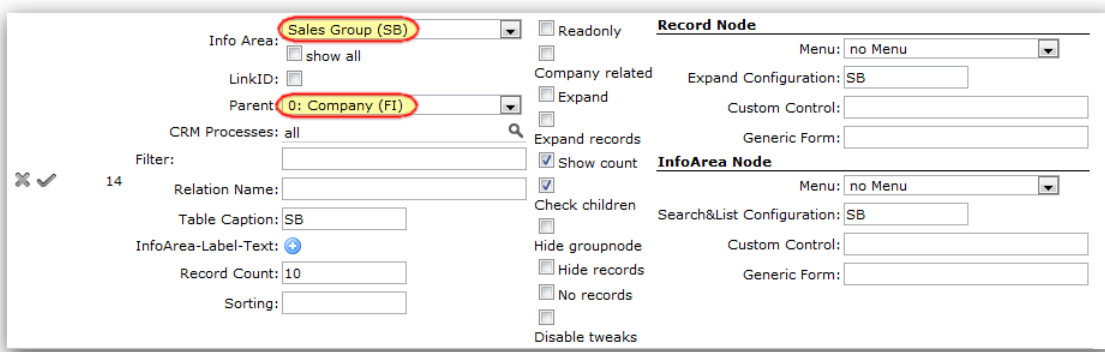
SD – Sales Menu



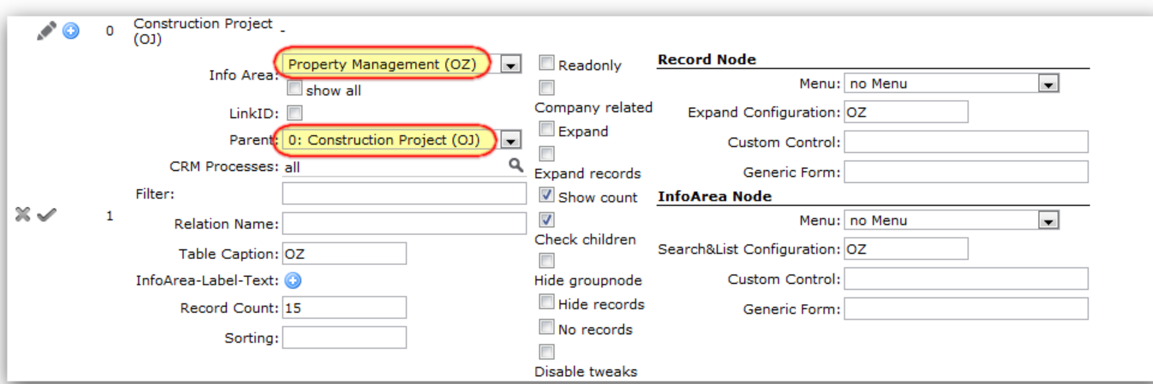
ID_NET_TERRITORY_MGMT	Sales Territory Management	UPDATE_DEFAULT	all
ID_NET_CALC_TERRITORYALLOCATION	Calculate territory allocation	UPDATE_DEFAULT	all
ID_NET_UNALLOC_COMPANIES	Companies without Allocation	UPDATE_DEFAULT	all
ID_NET_UNALLOC_PROPERTIES	Properties without Allocation	UPDATE_DEFAULT	all



SB – Company tree view



OZ – Constr. Project tree view



There's a RenderHook function for each list to set the style of the displayed fields. RenderHook functions which are located in the renderhooks.js file (\web\scripts\te.base\...) and used for the following info areas:

SD – sd_Compare_ValidDates_with_CurrentDate

SB – sb_Compare_ValidDates_with_CurrentDate

OZ – oz_Compare_ValidDates_with_CurrentDate

Call of the renderhook function:

```
u8.TeBase.RenderHooks.sd_Compare_ValidDates_with_CurrentDate($);
```

Renderhook itself

```
sd_Compare_ValidDates_with_CurrentDate: function (object) {

    var currentDate = new Date();
    var validFrom = u8.services.typeConverter.toDate(object.getValue("ValidFrom"));
    var validTo = u8.services.typeConverter.toDate(object.getValue("ValidTo"));

    if (object.getValue("ValidTo").toString() != "" && validTo <= currentDate) {

        object.addClass("TextRed");
    }
    if (object.getValue("ValidFrom").toString() != "" && validFrom > currentDate) {

        object.addClass("TextItalic");
    }
},
```

Styles which are used to set the style of the fields in the list: (template.css)

```
.TextRed
{
    color: #FF0000 !important;
}

.TextItalic
{
    font-style:italic !important;
}
```

Menu action to start the calculation of the territory allocation (action from “update_default”)

ID_NET_TERRITORY_MGMT	Sales Territory Management	UPDATE_DEFAULT	all
ID_NET_CALC_TERRITORYALLOCATION	Calculate territory allocation	UPDATE_DEFAULT	all
ID_NET_UNALLOC_COMPANIES	Companies without Allocation	UPDATE_DEFAULT	all
ID_NET_UNALLOC_PROPERTIES	Properties without Allocation	UPDATE_DEFAULT	all

The Rep ID, with which the the calculation is done can be set with a web config parameter. Web config parameter: “UpdateServer.RepID”

UpdateServer.RepID
ID of u7Server Rep
000100022
Configuration: TE_ISI

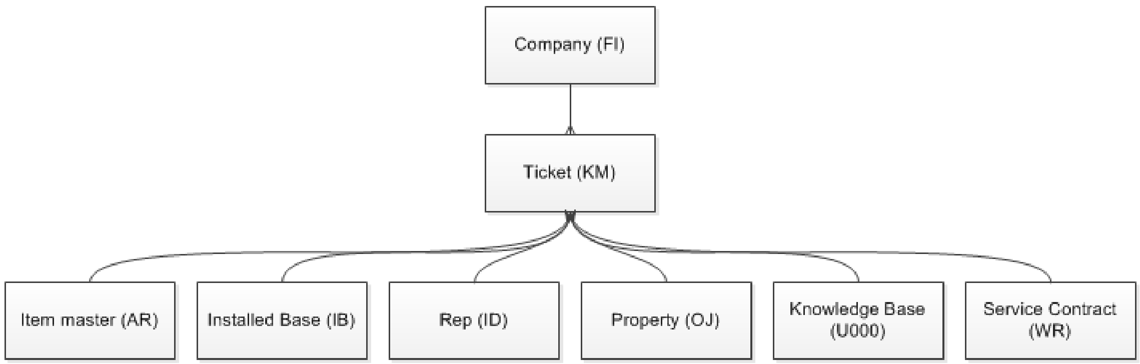
Menu actions which are used to show companies and properties without allocation (actions from “update_default”)

ID_NET_TERRITORY_MGMT	Sales Territory Management	UPDATE_DEFAULT	all
ID_NET_CALC_TERRITORYALLOCATION	Calculate territory allocation	UPDATE_DEFAULT	all
ID_NET_UNALLOC_COMPANIES	Companies without Allocation	UPDATE_DEFAULT	all
ID_NET_UNALLOC_PROPERTIES	Properties without Allocation	UPDATE_DEFAULT	all

Service

Learn about the customer service process in business solution template.

Complaint Management and Tickets(CRM 70000500)



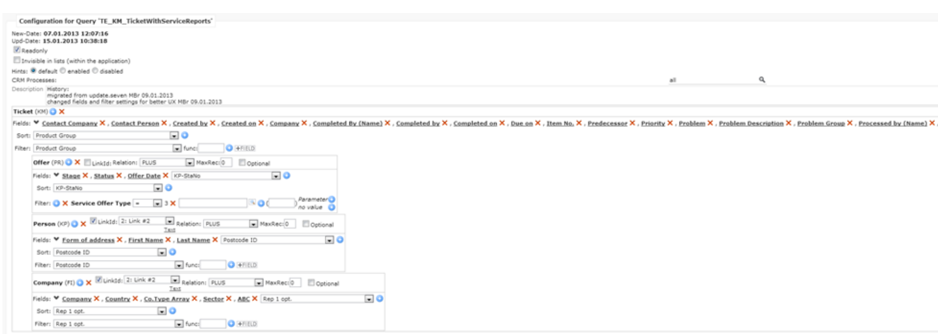
Service Tickets

The Service Tickets Analysis gives an overview over all tickets that have (or have not) a service report linked.

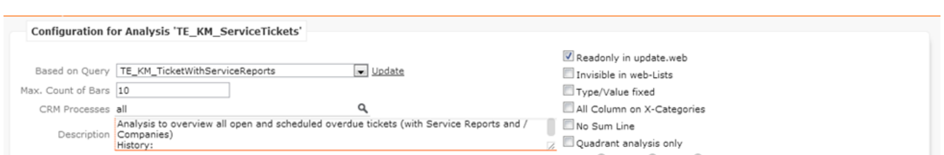
The number of tickets, service reports and companies is therefore counted.

Query: TE_KM_TIcketsWithServiceReports

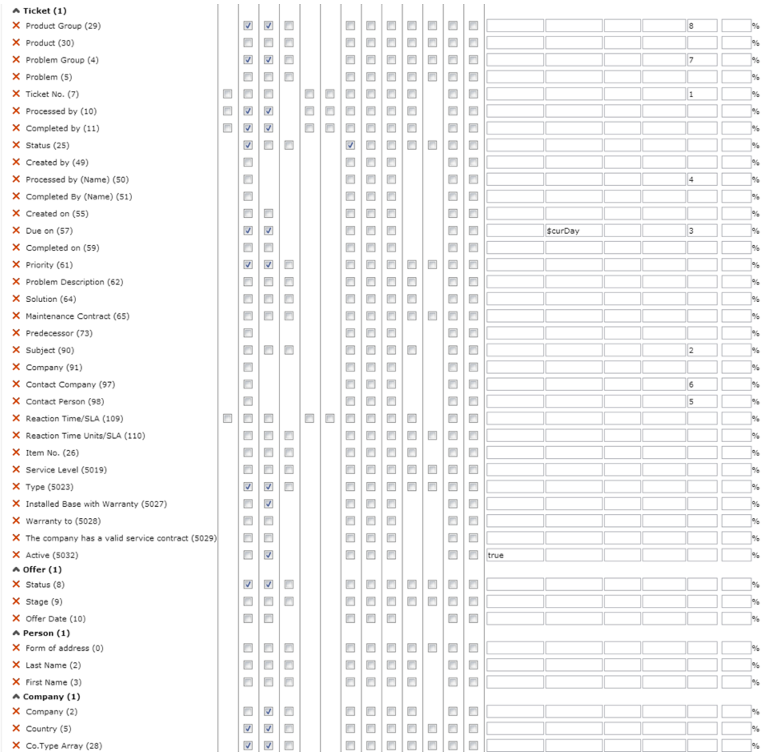
The query provides all detailed information from the ticket as well as additional information from the offer (service report), the linked person (if available) and the company.



Analysis: TE_KM_ServiceTickets



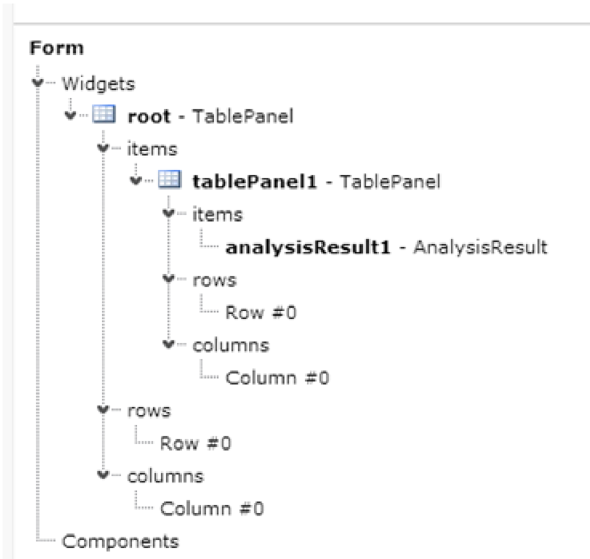
The above defined query is the basis for the analysis.



By default only the tickets still marked as “active” are displayed and only tickets with a due date smaller than the current day. Many filter and drill-down options provided from the query fields are used. A list is provided to enable a drill-down to record level. The number of tickets, offers and companies is shown based on the status of the ticket.

Form: TE_ServiceTickets

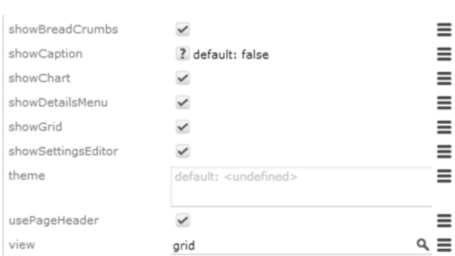
Layout of the form:



Details definition of analysisResult1:

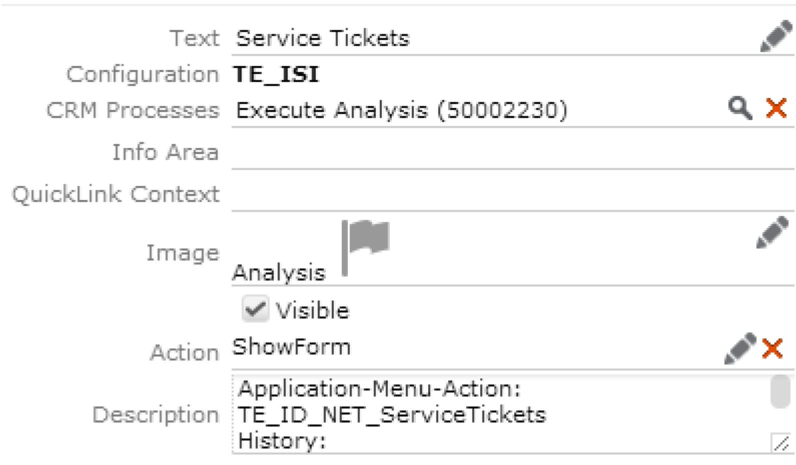
The above defined analysis is called

By default, the Bar3D chartType shall be used, the user does not have the option to change this behavior. Additionally, the legend and the values are displayed.

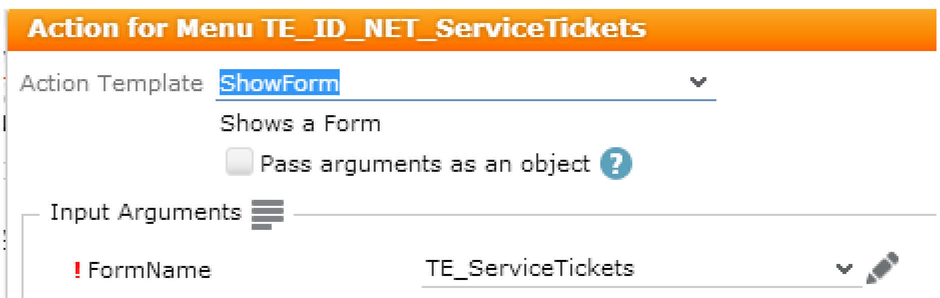


The analysis is displayed in the grid view, and the chart as well as the grid is selectable. The user has the option to use the filter and drill-down possibilities and can have a details view of the various records.

Application Menu Entry: TE_ID_NET_ServiceTickets



The entry is directly called from the “ID_NET_QUERIES_AND_STATISTICS” application menu and calls the above defined form without any special parameters:

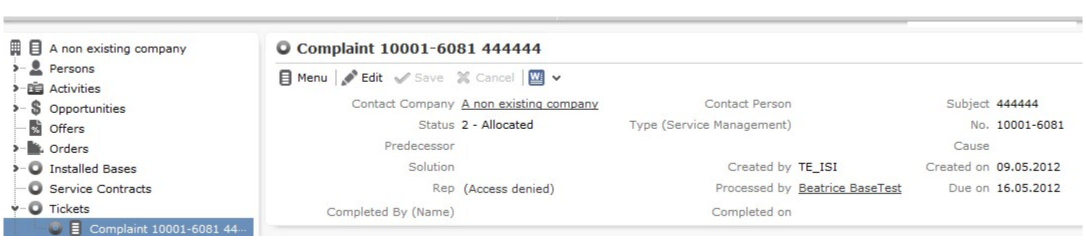


Complaint Management

Learn about the info areas that are customized for complaint management.

Info areas which have been customized for complaint management:

KM – Ticket (Customized in BASE Template)



Ticket Management

The template logic was not changed from u7 to u8. The same functionality still exists:

Workflow:Ticket

	Name	Dependent	With Conditions	New	Upd
0	TE_KM_CheckWarranty_NEW			✔	
1	TE_KM_CheckWarranty_UPD				✔

The following workflows are still used and are called via the “TE_SR Central” station right

- TE_KM_CheckWarranty_NEW
- TE_KM_CheckWarranty_UPD

A special record selector in the ticket mask is necessary in order to use this functionality.

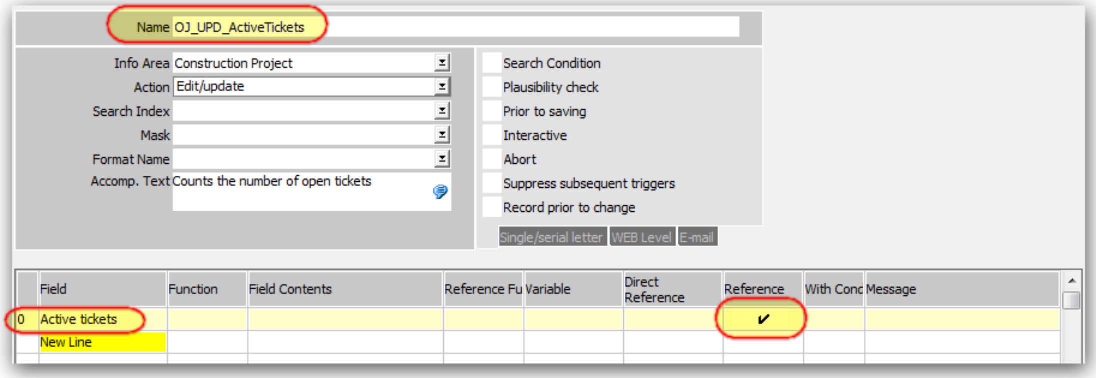
Record Selector for Installed Base:

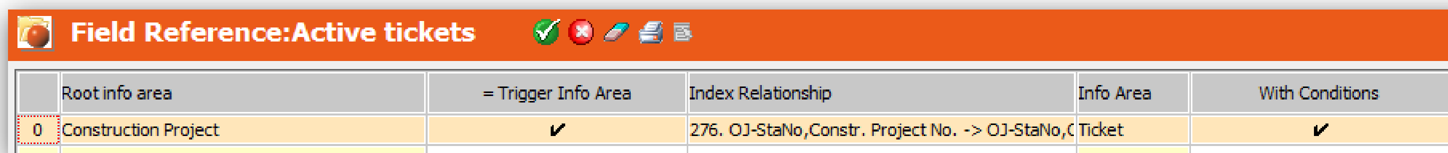
```
selectRecord({
    from: {
        infoAreaId: "IB"
    },
    target: {
        infoAreaId: "KM",
        copyFields: {
            ItemNo: "ItemNo",
            ItemName: "ItemName",
            ProdGrp: "ProdGrp",
            Product: "Product",
            LinkStatNo: "StatNo",
            LinkSeqNo: "SeqNo",

            // The following fields are cleared --> "empty"
            5030: 5008, //"Installed Base checked"
            5027: 5008, //"Installed Base with Warranty"
            5028: 5010, //"Warranty to"
            5031: 5008, //"Valid Service Contract for Installed Base exists"
            5013: 5009, //"WR-StaNo"
            5014: 5009, //"WR-SerNo"
            5016: 5009, //"WP-StaNo"
            5017: 5009, //"WP-SerNo"
            5015: 5009, //"Service Contract"
            5018: 5009  //"Service Contract Item"
        },
        addLink: true
    },
    findAsYouType: {
        maxRows: 5,
        infoAreaId: "IB",
        searchFields: [1],
        textFields: [1, 3, 4]
    }
});
```

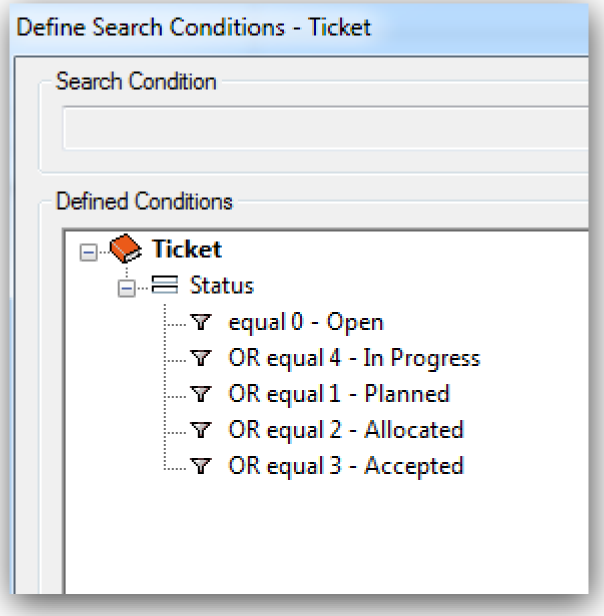
Number of Open Tickets

2 new data model fields – info area: IB and OJ (int 4 Byte) “Active Tickets” 2 new triggers:

- IB_UPD_ActiveTickets
- OJ_UPD_ActiveTickets

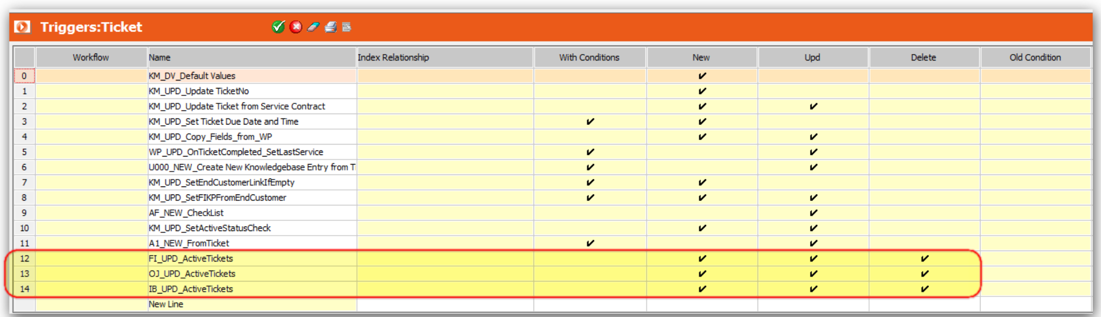






The triggers count the active tickets for one of these info areas. “Active Ticket” definition:

All triggers which count the number of active tickets are called via the “TE_SR Central” station right to the Ticket info area:


Triggers:Ticket

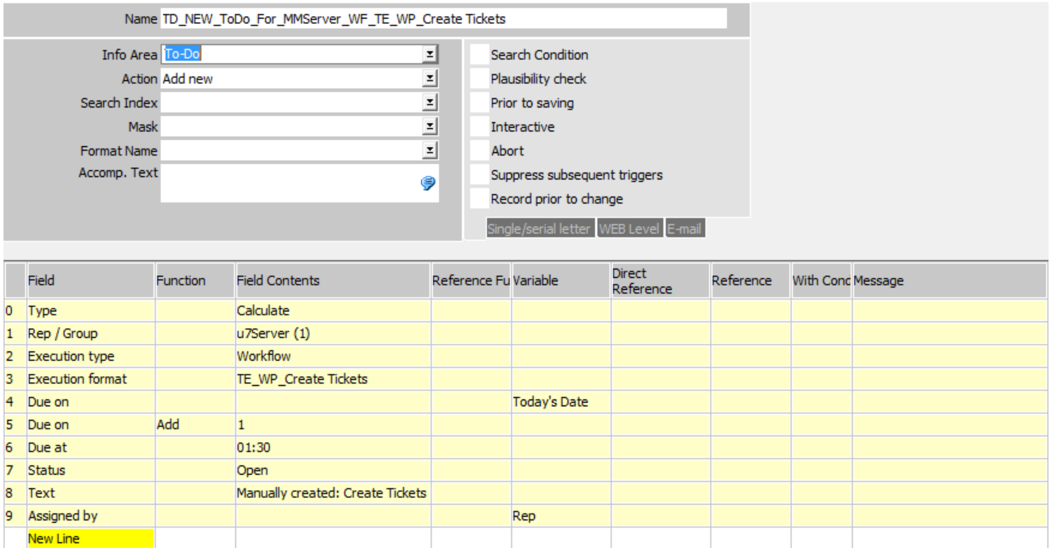
	Workflow	Name	Index Relationship	With Conditions	New	Upd	Delete	Old Condition
0		KM_DV_Default Values			✔			
1		KM_UPD_Update TicketNo			✔			
2		KM_UPD_Update Ticket from Service Contract			✔	✔		
3		KM_UPD_Set Ticket Due Date and Time		✔	✔			
4		KM_UPD_Copy_Fields_from_WP			✔	✔		
5		WP_UPD_OnTicketCompleted_SetLastService		✔		✔		
6		U000_NEW_Create New Knowledgebase Entry from T		✔		✔		
7		KM_UPD_SetEndCustomerLinkIfEmpty		✔	✔			
8		KM_UPD_SetFIKPFromEndCustomer		✔	✔	✔		
9		AF_NEW_CheckList				✔		
10		KM_UPD_SetActiveStatusCheck			✔	✔		
11		A1_NEW_FromTicket		✔		✔		
12		FI_UPD_ActiveTickets			✔	✔	✔	
13		OJ_UPD_ActiveTickets			✔	✔	✔	
14		IB_UPD_ActiveTickets			✔	✔	✔	
		New Line						

Automatic Creation of Maintenance Tickets

The TD info area has been customized to allow the admin to configure mmServer To-Dos.

A new “TE_TD_New_KMForWPs” button has been created to create a special To-Do for this functionality. This button calls the

“TD_NEW_ToDo_For_MMServer_WF_TE_WP_Create Tickets” trigger which creates a new To-Do record.

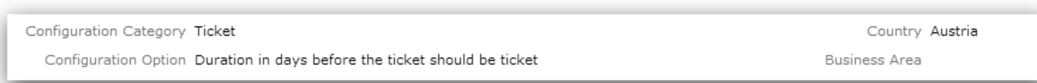


	Field	Function	Field Contents	Reference Fu	Variable	Direct Reference	Reference	With Cond	Message
0	Type		Calculate						
1	Rep / Group		u7Server (1)						
2	Execution type		Workflow						
3	Execution format		TE_WP_Create Tickets						
4	Due on				Today's Date				
5	Due on	Add	1						
6	Due at		01:30						
7	Status		Open						
8	Text		Manually created: Create Tickets						
9	Assigned by				Rep				
	New Line								

The list is refreshed and a message is displayed when you use the “u8.TelSI.Call-backFunctions.refreshListWithInfo” callback function.

The “TE_WP_Create Tickets” workflow is called via the mmServer service to check the WP records. After executing the workflow a new To-Do is created for the next day.

The admin is able to change the duration of days before the ticket is created by using the following settings. Template Configuration Table:

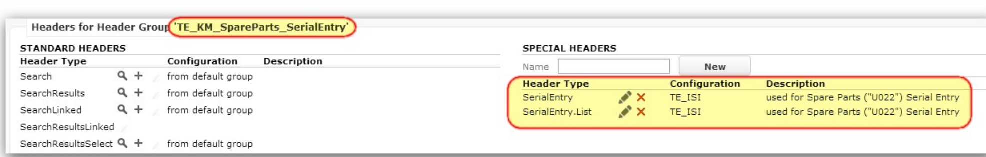


Spare Parts – Serial Entry

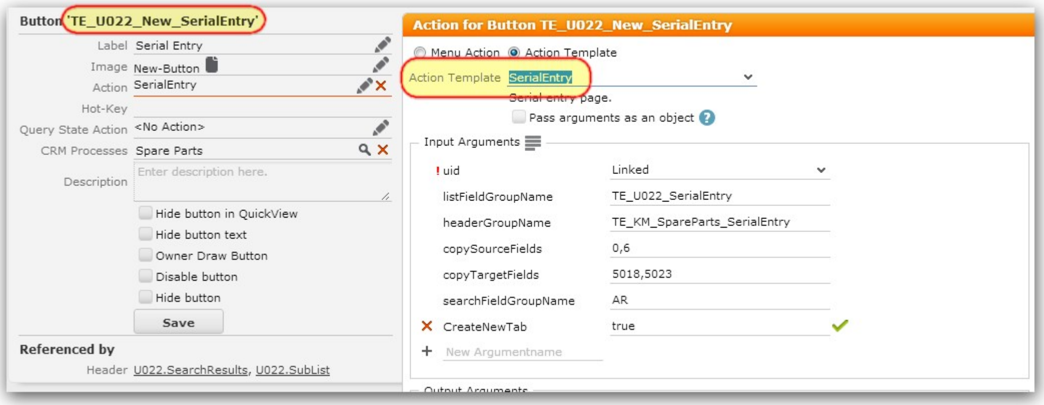
The “U022” Spare Parts info area has been customized and is available as a sub-list of the Ticket (KM). Serial Entry modifications:

New “TE_U022_SerialEntry” field group which contains the fields for the serial entry

New “TE_KM_SpareParts_SerialEntry” header group which contains the serial entry headers



New “TE_U022_New_SerialEntry” button which calls the serial entry



Transfer to Knowledgebase

On the Ticket-Mask for the Types 'Ticket' and 'Maintenance' is a checkbox 'Transfer to Knowledgebase'. When it is checked a Trigger named 'U000_NEW_Create New Knowledgebase Entry from Ticket' will run under the following conditions:

- Status is closed.
- KB-StaNo and KB-SerNo are empty.
- The Type is not 'Complaint'.

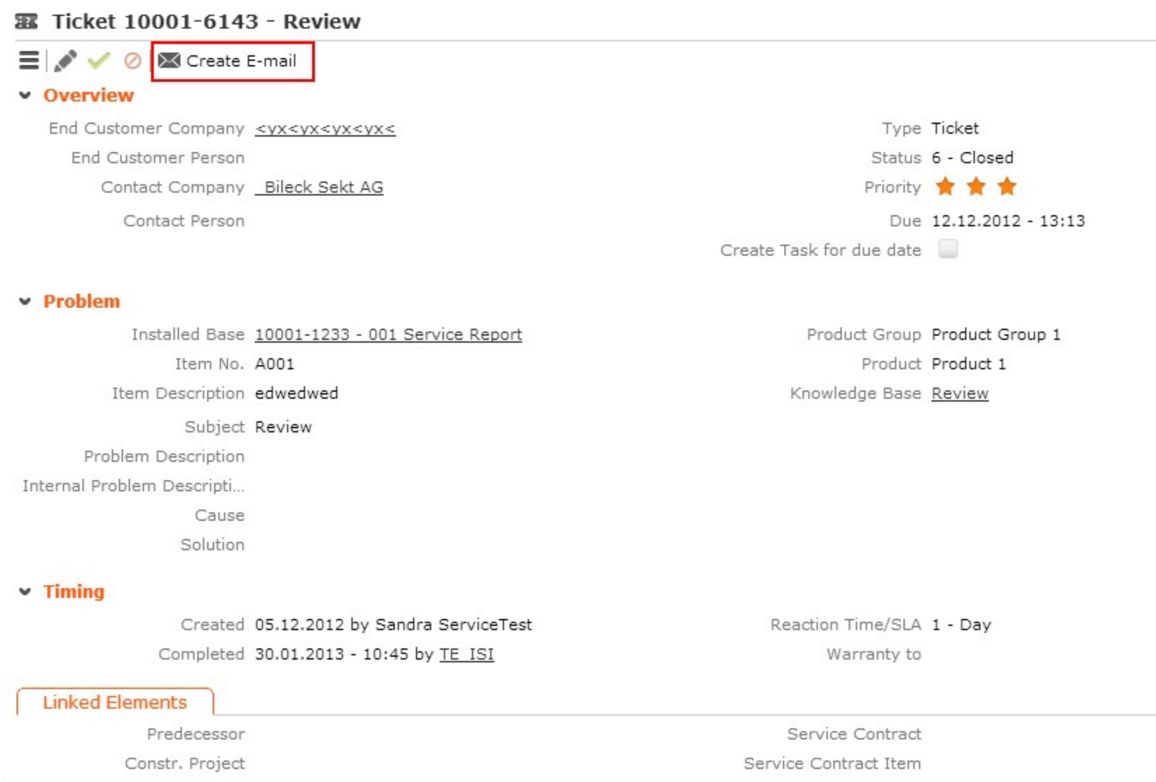
The trigger will create a knowledge base record linked to the ticket and will copy the following fields from the KM to the KB record:

- Subject
- Problem Group
- Problem
- Product Group
- Product
- Item No.
- Item Description
- Problem Description
- Cause
- Solution

Send Mail from Ticket

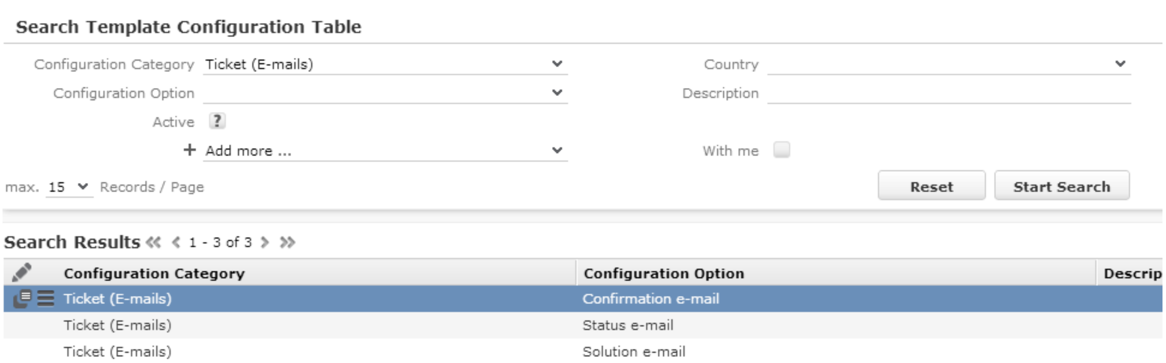
It is possible to create MA records from tickets using the 'TE_KM_SendTicketAsEmail' process which is called using the 'TE_KM_SendTicketAsEmail' button.

The process lets you choose the template text for the MA record that is to be created, the language of this text, then calls the 'TE_KM_SendTicketAsEmail_CallWorkflow' workflow to create/link the MA record and copies the selected template text to the record. Finally the user is moved to the created MA record and is able to edit/send it directly.



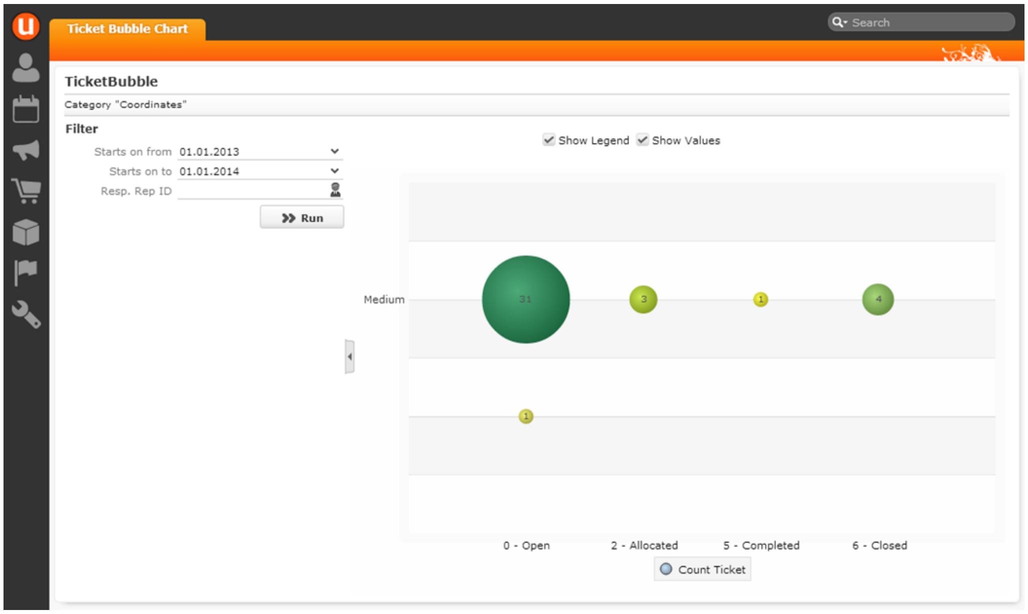
Administration of Ticket Mails

The text of the mail can be configured in the Template Configuration Table.



Analysis: Ticket Bubble Chart

An “Administration of Ticket Mails” analysis has been added to the “Queries & Analyses” application menu. No futher customization has been carried out since the feature comes from the core product.



Claim Management – Claim Positions (U028)

Learn about claim management and claim positions.

WIN:

A new table (U028 – child of KM) has been created. This table has a generic link. In our case, this link is used to link AP or UP records.

Claim Position

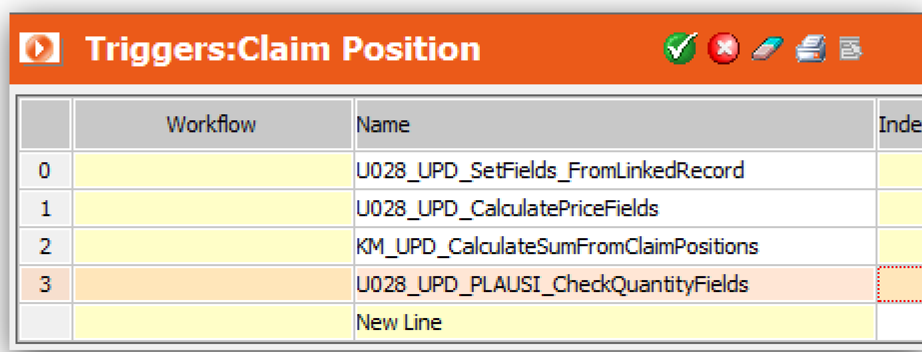
	ID	Name	Type	Reference	Catalog	DB Column	Time st	Length	F
0	4001	U028-StaNo	sno(2Byte)			ID		5	r
1	4002	U028-SerNo	lno(4Byte)			ID		9	r
2	4005	Currency	currency		(49) Currency	CURRENCY	✔	80	r
3	4006	Link to Info Area	tablecode			TAB_GENERIC	✔	4	
4	4007	Link_StaNo	sno			ID_GENERIC	✔	5	r
5	4008	Link_SerNo	lno			ID_GENERIC	✔	10	r
6	4009	Item	reference (genlink)	Link->				80	

The ticket table (KM) has been extended.

195	5081	Sum Net Price (claimed		decimal(8Byte)
196	5082	Sum Net Price (defect p	decimal(8Byte)

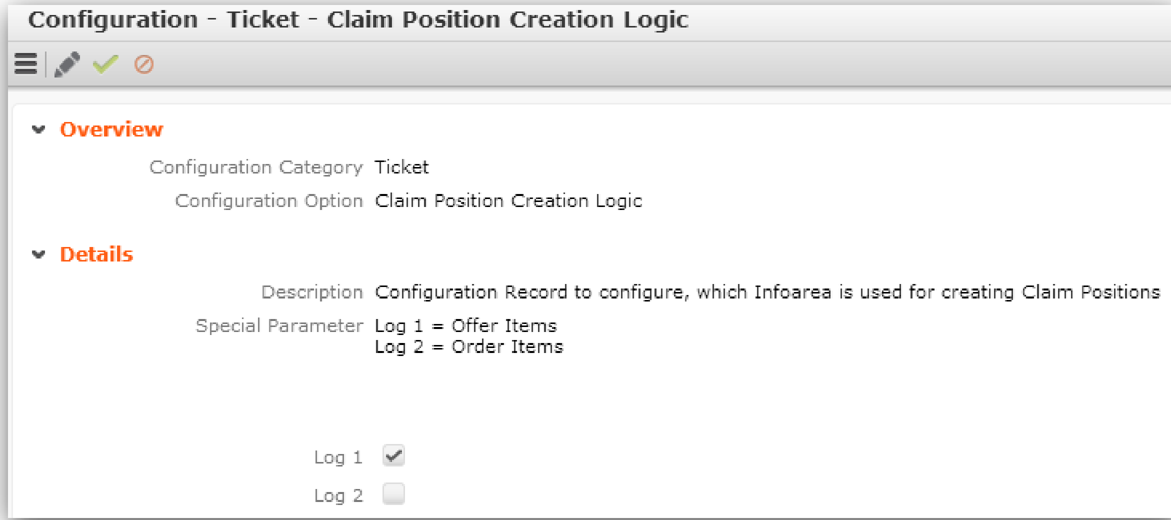
The following elements are used to create records, calculate prices and check the data quality:

Element	Name	Usage
Workflow	U028_UPD_SetFields_FromLinkedRecord	Used to copy quantity, currency and price from the linked position record
Trigger	U028_UPD_CalculatePriceFields	Used to calculate the price fields oin the U028 record
Trigger	U028_UPD_PLAUSI_CheckQuantityFields	Plausi trigger to check the quantity which is entered by the user
Trigger	KM_UPD_CalculateSumFromClaimPositions	Used to sum up the price fields to the ticket record.
Trigger	U028_DEL_DeleteClaimPositions	Used to delete all u028 records linked to the ticket

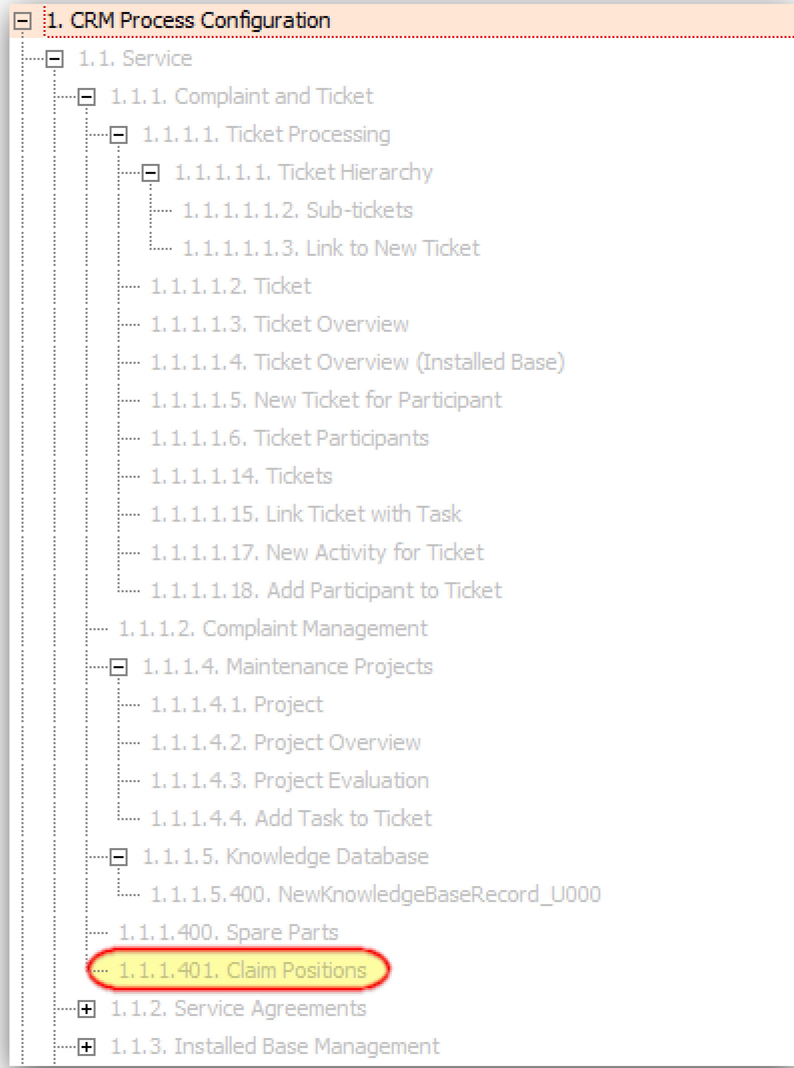


The template configuration table catalog has been extended. New value: “Claim Position Creation Logic”.

This record defines the creation logic of the claim positions:



The process tree has been extended:



WEB:

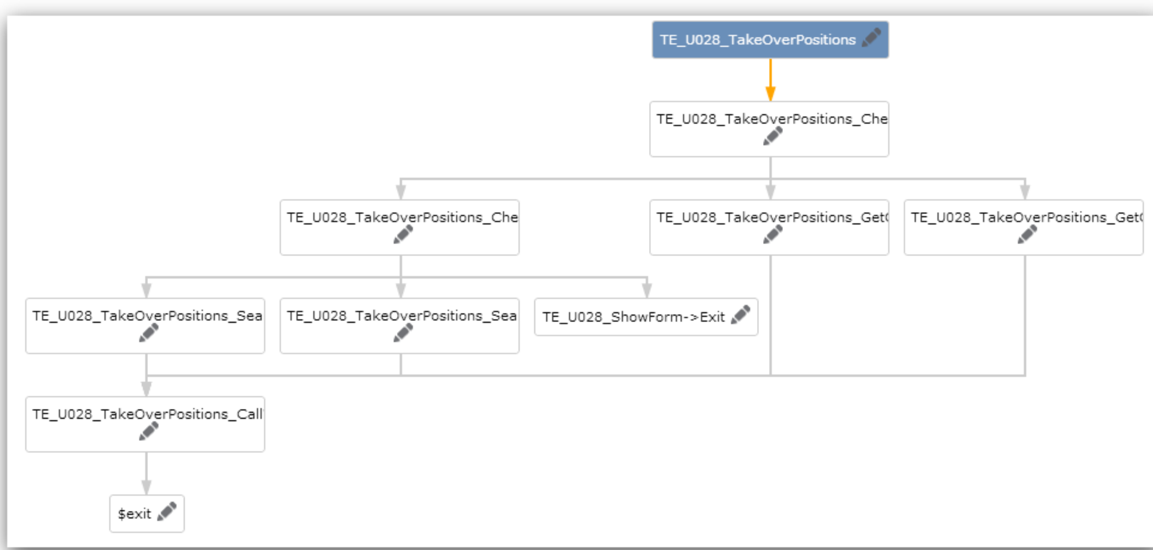
A new process has been created to add new claim position records. The process is started by clicking the “TE_U028_TakeOverPositions” button.

Used designer elements:

Element	Name	Usage
Button	TE_U028_ChangeSelection	Calls “TE_U028_TakeOver-Positions” process
Button	TE_U028_DeletePositions	Deletes all U028 records linked to the ticket using a trigger
Button	TE_U028_TakeOverPositions	Calls the “TE_U028_ChangeSelection” form to allow the user to select relevant claim positions
Process	TE_U028_TakeOverPositions	Process to create claim positions
Process Step	TE_U028_TakeOverPositions_CheckClaimPositions	See step description (designer)
Process Step	TE_U028_TakeOverPositions_CheckConfigRecord	See step description (designer)
Process Step	TE_U028_TakeOverPositions_GetOfferFromU028	See step description (designer)
Process Step	TE_U028_TakeOverPositions_GetOrderFromU028	See step description (designer)
Process Step	TE_U028_TakeOverPositions_SearchOffer	See step description (designer)
Process Step	TE_U028_TakeOverPositions_SearchOrder	See step description (designer)
Process Step	TE_U028_TakeOverPositions_CallWorkflow	See step description (designer)
Process Step	TE_U028_ShowForm->Exit	See step description (designer)

Form	TE_U028_ChangeSelection	Form which displays all claim position records. The user is allowed to check the relevant claim positions.
Form	TE_U028_ShowMessage->Exit	Form which shows a message and closes the popup message if the button is clicked
Filter	PR.RelevantForClaimPositions	Filter is used in "TE_U028_TakeOverPositions_SearchOffer" step to show offers which are relevant for this claim
Filter	U028.RelevantForClaim	Used in sub-list to show relevant claim positions

Process Graph:



Ticket Process

Learn about the ticket process.

Used Elements

Process:

- TE_KM_TicketMgmt

Action Template:

- TE_KM_TicketMgmt_DataProvider

Process Steps:

- TE_KM_TicketMgmt_CheckType->Overview
- TE_KM_TicketMgmt_CompleteTicket
- TE_KM_TicketMgmt_CompleteTicket_CheckFields
- TE_KM_TicketMgmt_DeclineTicket
- TE_KM_TicketMgmt_DeclineTicket_CheckFields
- TE_KM_TicketMgmt_DeclineTicket_SetFields
- TE_KM_TicketMgmt_DispatchManually
- TE_KM_TicketMgmt_DispatchManually_CheckFields
- TE_KM_TicketMgmt_DispatchManually_CreateActivity
- TE_KM_TicketMgmt_Initial
- TE_KM_TicketMgmt_ManualEscalation
- TE_KM_TicketMgmt_ManualEscalation_CheckFields
- TE_KM_TicketMgmt_ManualEscalation_SetFields
- TE_KM_TicketMgmt_New
- TE_KM_TicketMgmt_NewServiceOffer
- TE_KM_TicketMgmt_NewServiceReport
- TE_KM_TicketMgmt_NewSubRecord
- TE_KM_TicketMgmt_Overview
- TE_KM_TicketMgmt_QualifyTicket_CheckFields
- TE_KM_TicketMgmt_ReOpenTicket
- TE_KM_TicketMgmt_ReOpenTicket_CheckFields
- TE_KM_TicketMgmt_ReOpenTicket_SetFields
- TE_KM_TicketMgmt_SelectType

Forms:

- TE_KM_TicketMgmt_CompleteTicket
- TE_KM_TicketMgmt_DeclineTicket
- TE_KM_TicketMgmt_DispatchManually
- TE_KM_TicketMgmt_Overview
- TE_KM_TicketMgmt_Overview_s
- TE_KM_TicketMgmt_ReOpenTicket
- TE_KM_TicketMgmt_SelectType
- TE_KM_TicketMgmt_SolveTicket
- TE_KM_TicketMgmt_ManualEscalation

Expand Configs:

- TE_KM_TicketMgmt_Claim
- TE_KM_TicketMgmt_Complaint
- TE_KM_TicketMgmt_Idea
- TE_KM_TicketMgmt_MaintenanceTicket
- TE_KM_TicketMgmt_ServiceTicket
- TE_KM_TicketMgmt_New

Fieldgroups:

- TE_KM_TicketMgmt_Claim
- TE_KM_TicketMgmt_Claim_InfoBox
- TE_KM_TicketMgmt_Complaint
- TE_KM_TicketMgmt_ServiceTicket
- TE_KM_TicketMgmt_ServiceTicket_InfoBox
- TE_KM_TicketMgmt_New

Headergroups:

- TE_KM_TicketMgmt_Claim
- TE_KM_TicketMgmt_Complaint
- TE_KM_TicketMgmt_Idea
- TE_KM_TicketMgmt_MaintenanceTicket
- TE_KM_TicketMgmt_ServiceTicket
- TE_KM_TicketMgmt_Overview

TableCaption:

- TE_KM_TicketMgmt

Special Header:

- TE_KM_TicketMgmt_SendEmail
- TE_KM_TicketMgmt_SetPhase2
- TE_KM_TicketMgmt_SetPhase3
- TE_KM_TicketMgmt_SetPhase4
- TE_KM_TicketMgmt_SetPhase5
- TE_KM_TicketMgmt_SetPhase6
- TE_KM_TicketMgmt_SetPhase7
- TE_KM_TicketMgmt_ShowSubRecord
- TE_KM_TicketMgmt_SolveTicket
- TE_KM_TicketMgmt_SolveTicket_CheckFields
- TE_KM_TicketMgmt_SolveTicket_SetFields
- TE_KM_TicketMgmt_TicketInProgress
- TE_KM_TicketMgmt_TicketIsQualified_CheckFields
- TE_KM_TicketMgmt_TicketIsSolved_CheckFields

Buttons:

- TE_KM_TicketMgmt

Textgroup:

- TE_KM_TicketMgmt

Workflows:

- TE_KM_TicketMgmt_Declined
- TE_KM_TicketMgmt_DispatchManually
- TE_KM_TicketMgmt_Declined
- TE_KM_TicketMgmt_ManualEscalation
- TE_KM_TicketMgmt_Solved

Triggers:

- KM_UPD_TicketMgmt_SetTicketStatus_Declined
- KM_UPD_TicketMgmt_StartManualEscalation
- KM_UPD_TicketMgmt_StopManualEscalation
- KM_UPD_TicketMgmt_CountFields
- KM_UPD_TicketMgmt_SetConditionFlags
- KM_UPD_TicketMgmt_SetTicketStatus_Accepted
- KM_UPD_CountOpenLinkedTickets
- KM_UPD_TicketMgmt_SetPhase2
- KM_UPD_TicketMgmt_SetPhase3
- KM_UPD_TicketMgmt_SetPhase4
- KM_UPD_TicketMgmt_SetPhase5
- KM_UPD_TicketMgmt_SetPhase6
- KM_UPD_TicketMgmt_SetPhase7

Variables:

- TE_KM_TicketMgmt_AcceptTicket
- TE_KM_TicketMgmt_CloseTicket
- TE_KM_TicketMgmt_CompleteTicket
- TE_KM_TicketMgmt_DeclineTicket
- TE_KM_TicketMgmt_DispatchManually
- TE_KM_TicketMgmt_Manage
- TE_KM_TicketMgmt_ManualEscalation
- TE_KM_TicketMgmt_NewServiceOffer
- TE_KM_TicketMgmt_NewServiceOffer_Sublist
- TE_KM_TicketMgmt_NewServiceReport
- TE_KM_TicketMgmt_NewServiceReport_Sublist
- TE_KM_TicketMgmt_OpenDispatchingDashboard
- TE_KM_TicketMgmt_QualifyTicket
- TE_KM_TicketMgmt_ReOpenTicket
- TE_KM_TicketMgmt_SendEmail
- TE_KM_TicketMgmt_StopEscalation
- TE_KM_TicketMgmt_TicketInProgress
- TE_KM_TicketMgmt_TicketIsQualified
- TE_KM_TicketMgmt_TicketIsSolved

JavaScript:

- \web\scripts\te.isi\processes\TE_KM_TicketMgmt.js

CSS:

- \web\styles\te.isi\update.css

Images:

- TE_TicketMgmt_PhaseMapping
- TE_TicketMgmt_KMEmails_Phase1
- TE_TicketMgmt_KMEmails_Phase1_Active
- TE_TicketMgmt_KMServiceOffers_Phase2
- TE_TicketMgmt_KMServiceOffers_Phase2_Active
- TE_TicketMgmt_KMServiceReports_Phase5
- TE_TicketMgmt_KMServiceReports_Phase5_Active
-

Actions:

• TE_KM_Status_0 • TE_KM_Status_1 • TE_KM_Status_2 • TE_KM_Status_3 • TE_KM_Status_4 • TE_KM_Status_5 • TE_KM_Status_6 • TE_KM_Status_130 • TE_KM_Status_131 • TE_KM_8drelevant_true • TE_KM_Overdue • TE_KM_TicketMgmt_Accept • TE_KM_TicketMgmt_Decline • TE_KM_TicketMgmt_MA_s • TE_KM_TicketMgmt_TPR2_s • TE_KM_TicketMgmt_TPR3_s • TE_KM_validIB_false • TE_KM_validIB_true • TE_KM_validWR_false • TE_KM_validWR_true • TE_KM_validWRatIB_false • TE_KM_validWRatIB_true	• TE_A_KM_TicketMgmt • TE_A_KM_TicketMgmt_AcceptTicket_QueryState • TE_A_KM_TicketMgmt_CloseTicket_QueryState • TE_A_KM_TicketMgmt_CompleteTicket_QueryState • TE_A_KM_TicketMgmt_DispatchingDashboard_QueryState • TE_A_KM_TicketMgmt_ManualDispatching_QueryState • TE_A_KM_TicketMgmt_ManualEscalation_QueryState • TE_A_KM_TicketMgmt_NewServiceOffer_QueryState • TE_A_KM_TicketMgmt_NewServiceReport_QueryState • TE_A_KM_TicketMgmt_QualifyTicket_QueryState • TE_A_KM_TicketMgmt_ReOpenTicket_QueryState • TE_A_KM_TicketMgmt_SendEmail_QueryState • TE_A_KM_TicketMgmt_StopEscalation_QueryState • TE_A_KM_TicketMgmt_TicketInProgress_QueryState • TE_A_KM_TicketMgmt_TicketIsQualified_QueryState • TE_A_KM_TicketMgmt_TicketIsSolved_QueryState

How are the elements listed above working together?

Starting the ticket process, the data provider delivers the uid of the Ticket and some other parameters (eg. Phase). The delivered phase could be customized for every project. This is done using the “TE_TicketMgmt_PhaseMapping” variable.

Attention: If there is no Variable Value (Z6) defined for your station, then the process will not work!

After delivering the correct value the corresponding phase is active and the initial step of the process is called. This step checks if a uid is delivered or not. If a valid uid is delivered, then the “TE_KM_TicketMgmt_CheckType->Overview” step is executed. The type of the ticket is read in this step, because we are displaying different information per type.

After checking the type of the ticket, the “TE_KM_TicketMgmt_Overview” step is called. This step is our main process step where the whole logic is implemented.

In every case we are displaying a form with an expand view which uses the “TE_KM_TicketMgmt_Overview” header group. This header group contains all the buttons which are used to navigate around the process.

Every button has a linked query state action as you can see above (list of buttons and actions).

These actions are used to hide/unhide the buttons dependent on the phase (or other parameters). Furthermore, every button which is used to navigate around the process fires a command. The fired command is checked in the dispatching area of the overview step and the linked step is called.

Please check the step description in designer for more information about every single step.

There are 2 steps which cover the logic of all sub-records. One step is used to create new sub-records, the other one is used to display sub-records. (TE_KM_TicketMgmt_NewSubRecord / TE_KM_TicketMgmt_ShowSubRecord)

All sub-list headers of the related info areas have been modified. There are 2 new buttons. One of these buttons is displayed if the header is shown in a process, the other one is shown if the header is not displayed in a process.

The following query state actions are used and can be reused in projects to proceed the same way:

CORE_C_CanNew_disabled_Process

CORE_C_CanNew_disabled_NoProcess

CORE_C_VisibleInProcess

CORE_C_NotVisibleInProcess

The “Expand” headers of the related info areas have been modified too. We added the “CORE_Process_BackToOverview” button. This button uses the “CORE_C_VisibleInProcess” query state action. Therefore, the button is only visible in processes. This button is used to navigate back to our overview step.

Loop & Discovery Social Integration

This feature has been implemented with the ticket process. Therefore the elements which are used are nearly the same.

Used designer elements:

Element	Name	Usage
Button	TE_KM_TicketMgmt_WriteFeedback	Fires a command which is handled in the overview step of the ticket process
Button	TE_KM_TicketMgmt_ChangeCommunityStage	Opens a popup which shows a special expand

Element	Name	Usage
Button	TE_MA_New_CommunityAnswer	Opens a popup to create a new MA record (some fields are prefilled)
Button	TE_MA_New_CommunitySolution	Opens a popup to create a new MA record (some fields are prefilled)
Button	TE_Social_Save	Opens a popup to create a new MA record (some fields are prefilled)
ExpandConfig	TE_KM_Social_ChangeCommunityStage	-
Fieldgroup	TE_KM_Social_ChangeCommunityStage	-
Headergroup	TE_KM_Social_ChangeCommunityStage	-
ExpandConfig	TE_MA_Social_NewCommunityAnswer	-
Fieldgroup	TE_MA_Social_NewCommunityAnswer	-
ExpandConfig	TE_MA_Social_NewCommunitySolution	-
Fieldgroup	TE_MA_Social_NewCommunitySolution	-
Headergroup	TE_MA_Social_TE_MA_Social_NewCommunityAnswer/Solution	Contains the special “Save” button
ExpandConfig	TE_TW_TicketMgmt_Feedback	-

Element	Name	Usage
Fieldgroup	TE_TW_TicketMgmt_Feedback	-
Headergroup	TE_TW_TicketMgmt_Feedback	-
MenuAction	TE_A_KM_TicketMgmt_WriteFeed-back_QueryState	Query state action for linked button
MenuAction	TE_A_KM_TicketMgmt_ChangeCom-munityStage_QueryState	Query state action for linked button
Filter	MA.CommunicationLayer_Business-Centered	Filter for ticket sub-list
Process Step	TE_KM_TicketMgmt_WriteFeedback	Step to get TW record and display it

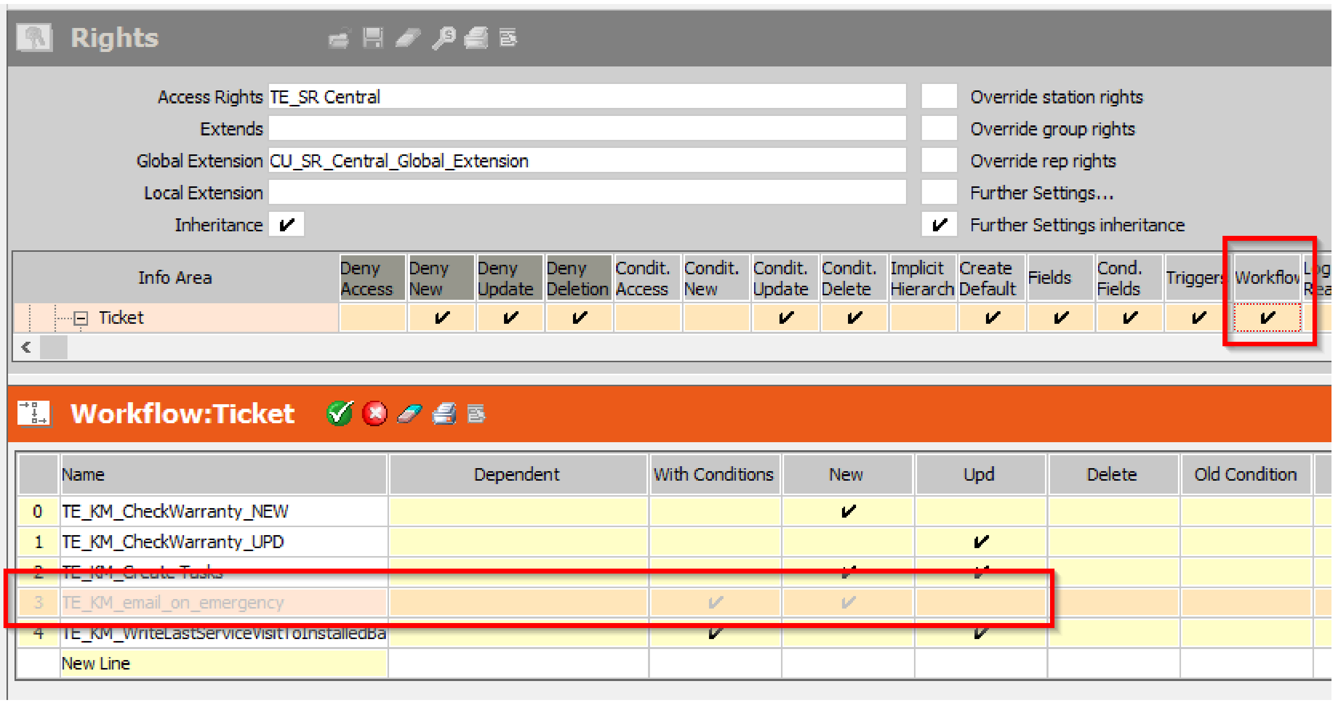
Used Files:

`\web\scripts\te.isi\processes\TE_KM_TicketMgmt.js`

`\web\scripts\te.isi\processes\isisocial.js`

Email Notification on High Priority Tickets

This feature is mainly realized via the workflow ‘TE_KM_email_on_emergency’.



The workflow fires, if a ticket with priority ‘high’ has been created. The workflow works like this:

- Process 1: The workflow starts with the created ticket and gets the associated company (if the field ‘ticket

  notification’ has been set on the company). From the company, the two reps are selected and their email address is saved into a parameter. After that the workflow checks if there is a sales group linked to the company, if so the workflow loops all sales group records in the command of process 1, if not the workflow continues to process 3.

- Process 2: If the company has more than one sales group linked to it, process 2 is called for each sales group record.

  The workflow checks all reps fields and saves the emails if there are reps saved.

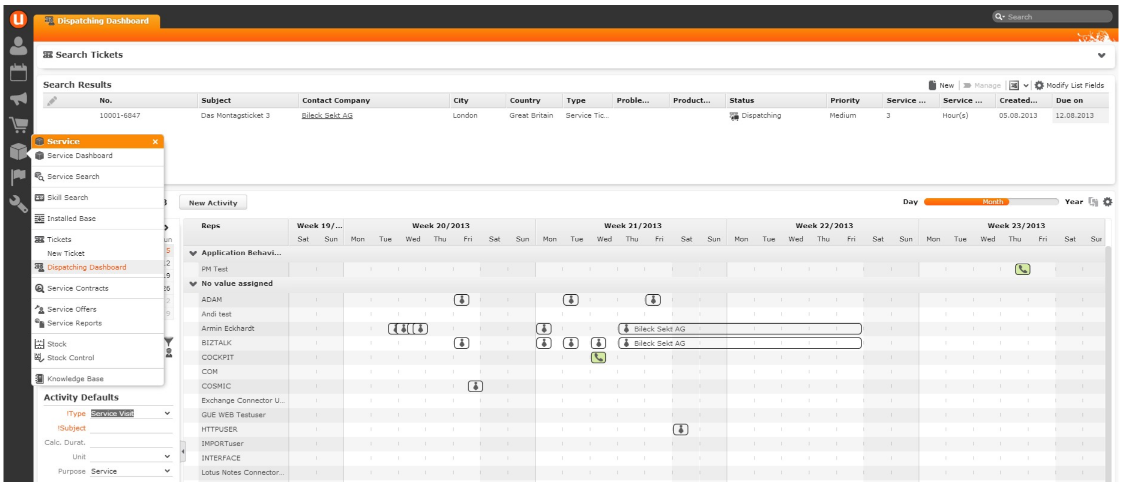
- Process 3: If there are no more sales group records or if there were not any at all, process 3 is called. This process writes all saved email into the ticket and calls the trigger KM_send_emergency_email which sends the actuall E-mail.

The trigger ‘KM_send_emergency_email’ which sends the E-mail uses the following variables to piece together the text of the E-mail:

- TE_KM_emergency_e-mail_subject
- TE_KM_emergency_e-mail_text1
- TE_KM_emergency_e-mail_text2

Dispatching Dashboard

The Dispatching Dashboard is a modified resource view which has been further customized for the ISI Template.



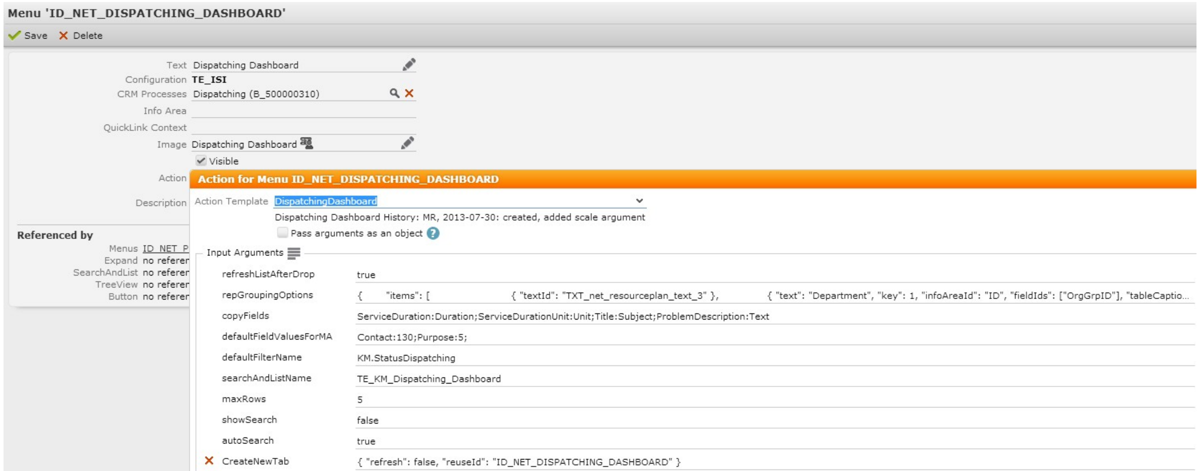
Search&List

The dashboard uses its own “TE_KM_Dispatching_Dashboard” Search&List which is very similar to the normal ticket search. The “KM.StatusDispatching” filter is loaded by default every time even if the user decides to remove it once.

Dispatching (using Drag&Drop)

An appointment (with the new “Service Visit” type) gets automatically created and linked to the ticket itself if you drag&drop a ticket to the resource view. The ticket then changes its status from “Dispatching” to “Allocated”. If the user removes the appointment (and it was the last remaining linked appointment of the “Service Visit” type) the linked tickets status is changed back from “Allocated” to “Dispatching” (this is done using 2 new triggers: “KM_UPD_CountServiceVisits”, “KM_UPD_Set-ToDispatching”).

Default Values



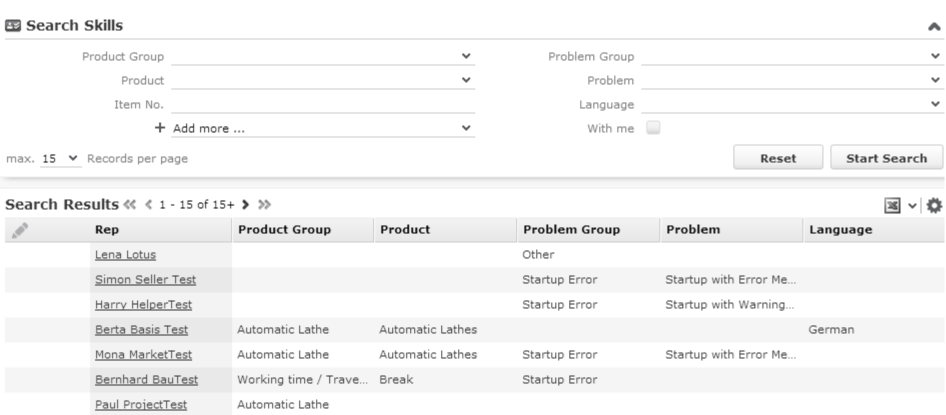
The dashboard is configured with a whole bunch of default values and copied values from the ticket itself, which additionally can be overwritten by the user using the “Activity Defaults” in the bottom left corner of the dashboard.

Known Issues

The “Activity Defaults” mask shows mandatory fields which are not really mandatory because if you leave them empty the values are pulled from the configured copyFields and defaultFieldValuesForMA.

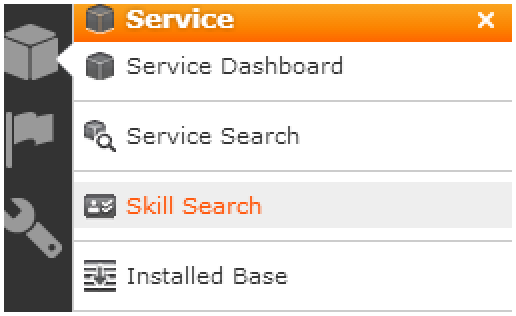
Skill Search (SI)

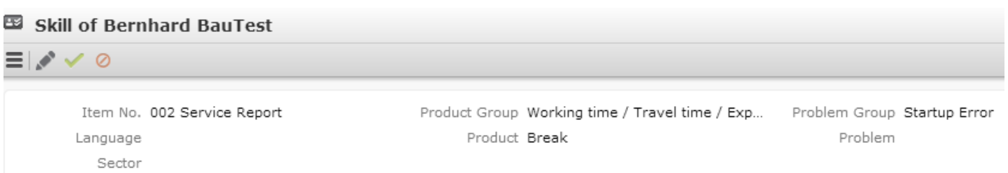
Learn about skill search.



Search&List of SI

Skill Search is accessible from the “Service” application menu :



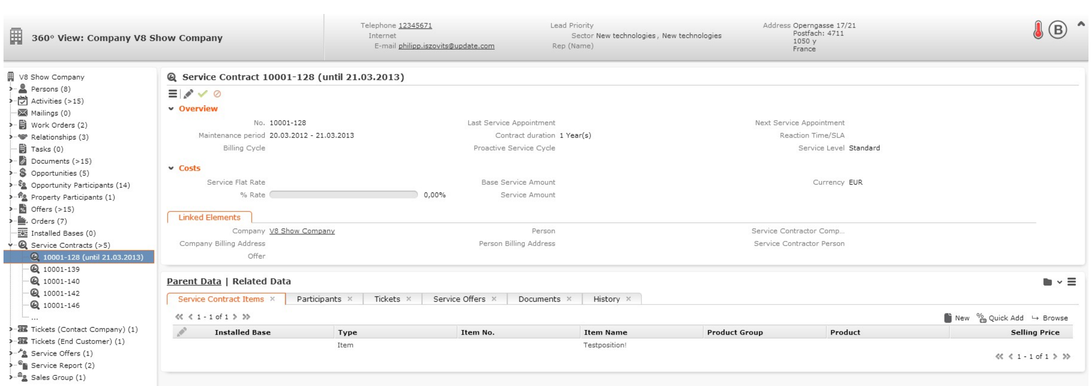


Details Mask of SI with record selector on the Item No. field:

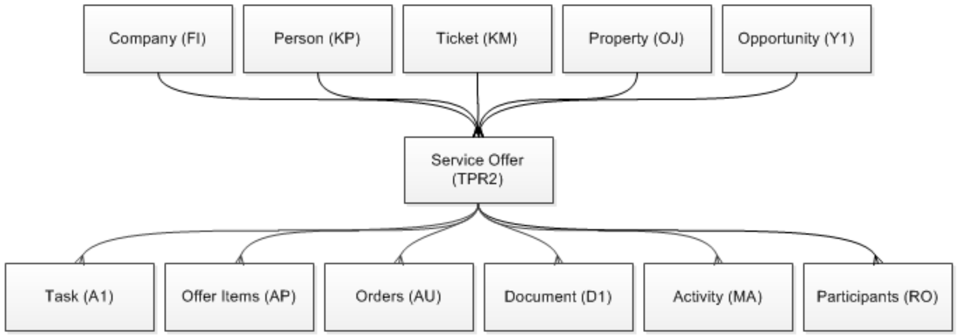
```
selectRecord({ from: {
    infoAreaId: "AR", selectionMode: "single", useAutoSearch: true
    },
    target: {
    copyFields: { 3: 0,
    6: 3,
    7: 4
    }
    }
});
```

Service Contract(CRM 525000?)

Service contracts have been customized into the FI tree along with a serial entry / quick add functionality which is very similar to the spare parts in the Tickets (KM) info area.



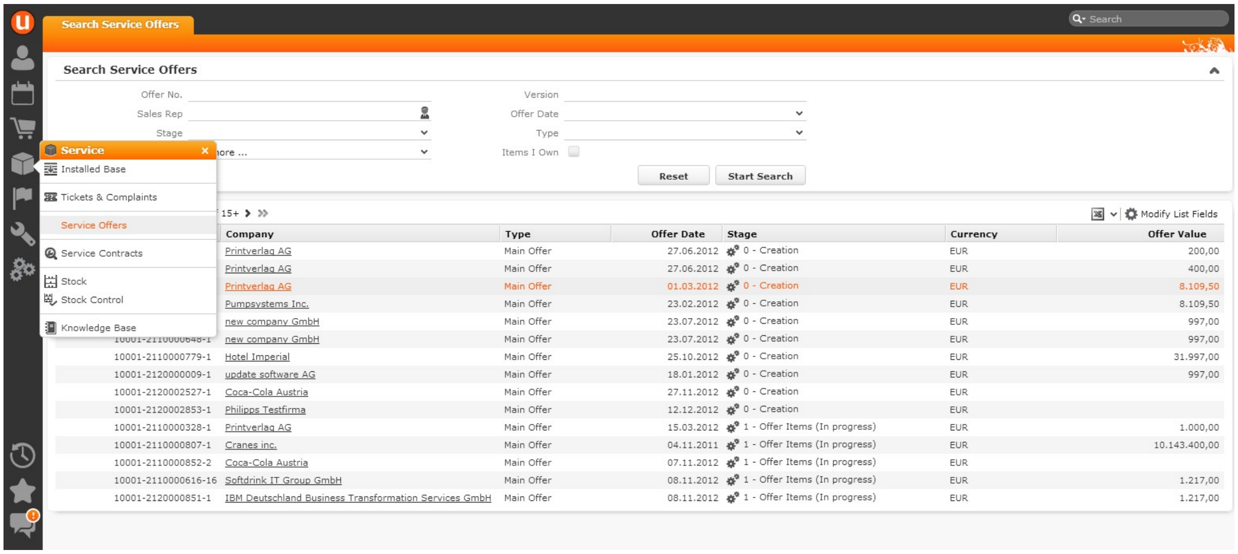
Service Offers(CRM Service Quote)



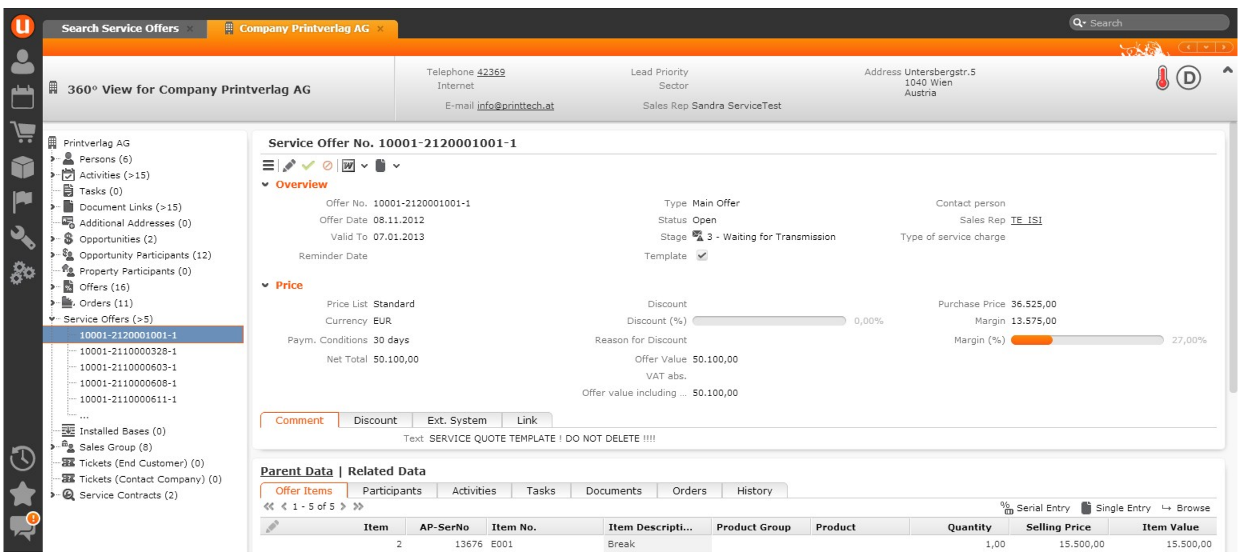
A new virtual Service Offer info area (TPR2) has been created in the settings.xml (web\web\system\settings):

```
<update.crm.base>
    <!--
    DefaultLanguage:
    The default language to be used as a fallback when no other language is defined.
    -->
    <DefaultLanguage>eng</DefaultLanguage>

    <!--
    Vertical:
    Defines the vertical of the installation.
    *WARNING* Changing this requires additional changes to other settings!
    possible values: "BB", "BC" or "FS".
    -->
    <Vertical>&VERTICAL;</Vertical>

    <DataBase>
        <LockFieldAttributes>Hidden</LockFieldAttributes>
        <Schema>
            <CustomFields>customfields.xml</CustomFields>
        </Schema>
        <VirtualSchema>
            <!-- ISI-TEMPLATE Virtual Infoareas must start with "T..." ! -->
            <!-- Company Competitor FI -->
            <InfoArea infoAreaId='TFI1' physicalInfoAreaId='FI' name='Competitor' fieldId='28'  fieldType='K' value='Competitor (BASE)' tenantNo='9000'/>

            <!-- Offer Types PR -->
            <InfoArea infoAreaId='TPR1' physicalInfoAreaId='PR' name='Service Contract Offer'   fieldId='5029' fieldType='K' value='Service Contract Offer (BASE)' tenantNo='9000'/>
            <InfoArea infoAreaId='TPR2' physicalInfoAreaId='PR' name='Service Offer'            fieldId='5029' fieldType='K' value='Service Offer (BASE)' tenantNo='9000'/>
            <InfoArea infoAreaId='TPR3' physicalInfoAreaId='PR' name='Service Report'           fieldId='5029' fieldType='K' value='Service Report (BASE)' tenantNo='9000'/>

            <!-- CUSTOMER Virtual Infoareas must start with "V..." as described in the infoletter -->
            <!-- DEFINE your customer virtual infoareas here: e.g.: <InfoArea infoAreaId='V...' physicalInfoAreaId='' name='Competitor' fieldId=''  fieldType='' value='' tenantNo=''/>
        </VirtualSchema>
    </DataBase>
</update.crm.base>

<!-- settings of update.crm.core -->
<update.crm.core type="update.Crm.Core.&Vertical;.Application.update.Crm.Core.&Vertical;">
```

Search&List can be reached using the “Service” menu:

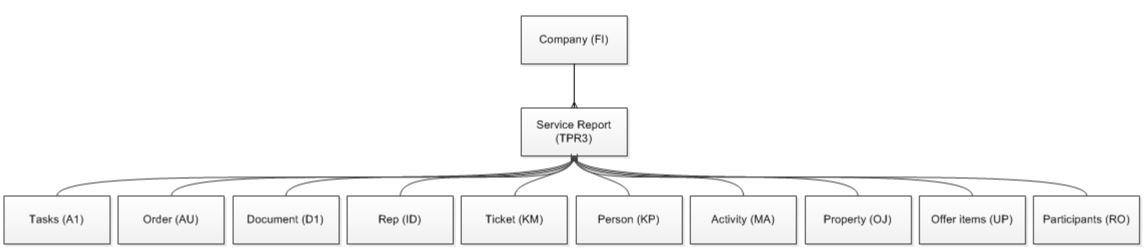


Open data entries in the FI tree

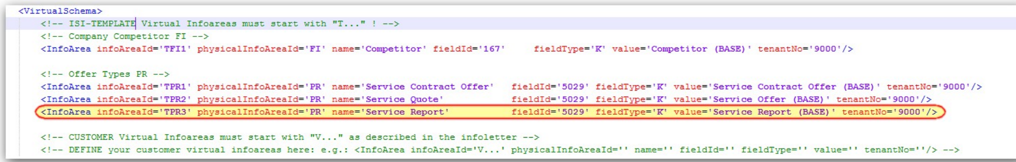


Service Reports

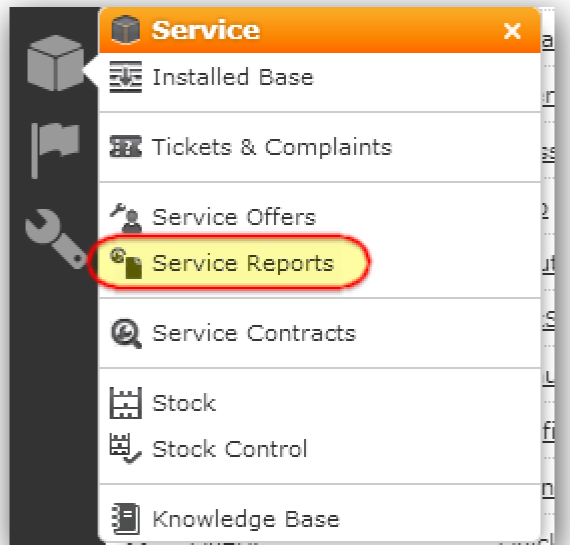
Learn about the new service reports.

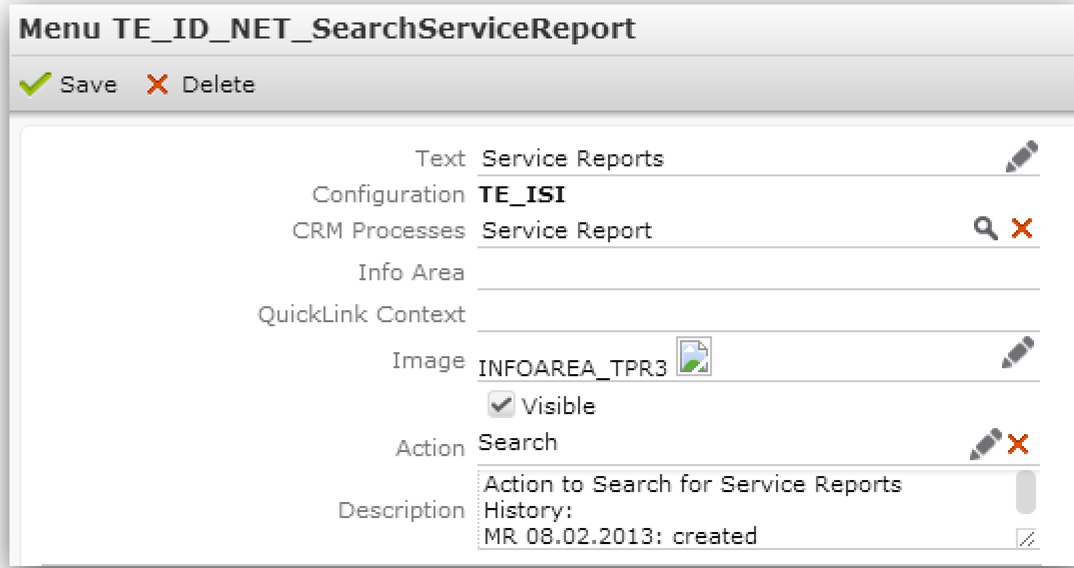


A new virtual info area (TPR3) has been created for service reports in the settings.xml (web\web\system\settings):



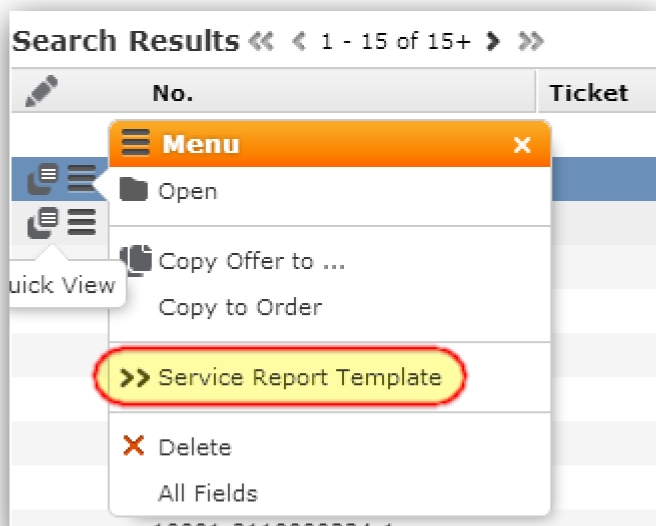
The new info area can be reached using the Service application menu.

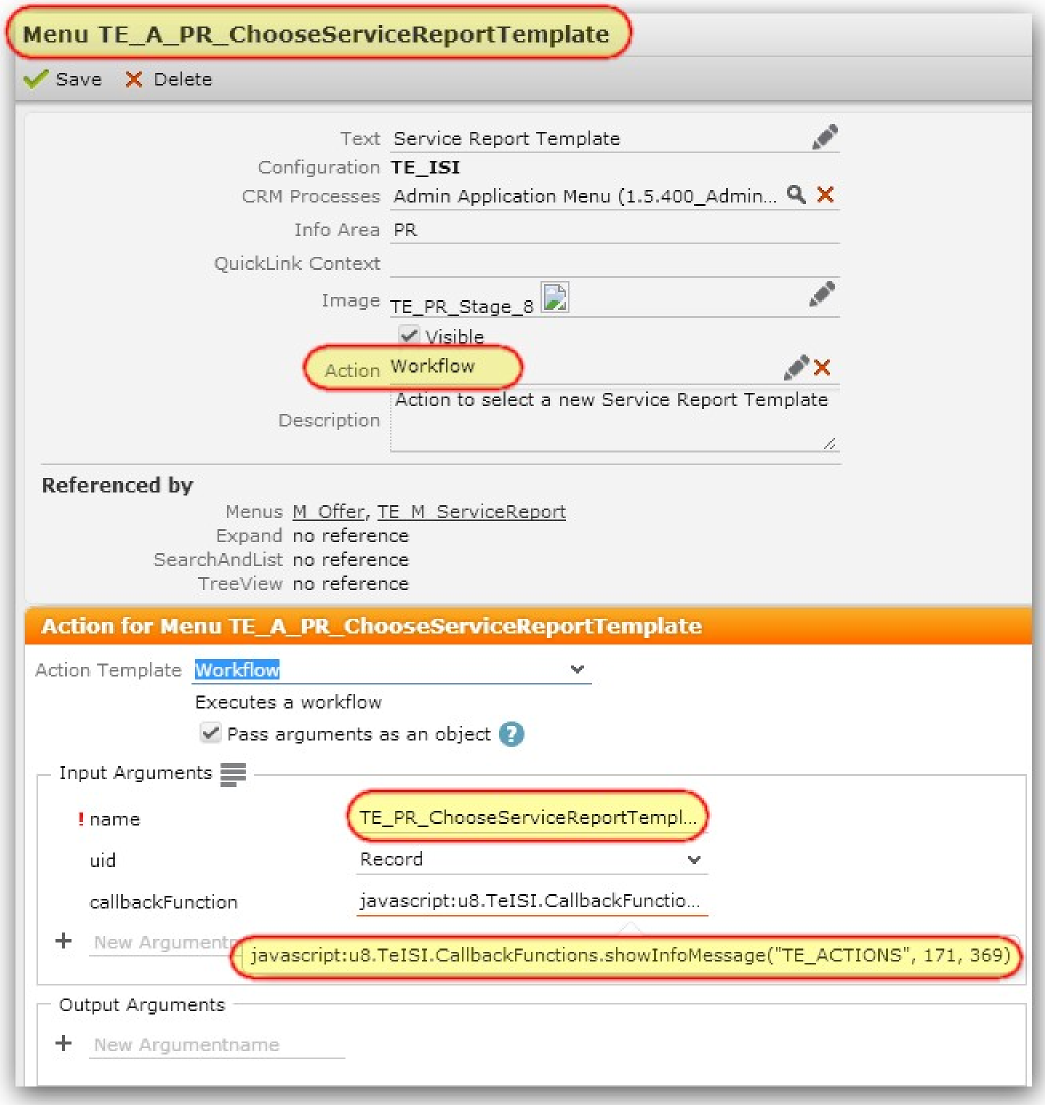




Service Report Template

It is possible to define one service report template for the whole system. The field #5038 will be set to “true” for this record by clicking the “Service Report Template” context menu entry. This flag is unchecked for the “old” service report template. This is done using the “TE_A_PR_ChooseServiceReportTemplate” context menu action which calls the “TE_PR_ChooseServiceReportTemplate” workflow.





Additionally, a new template configuration record (A000) is created with the following values:

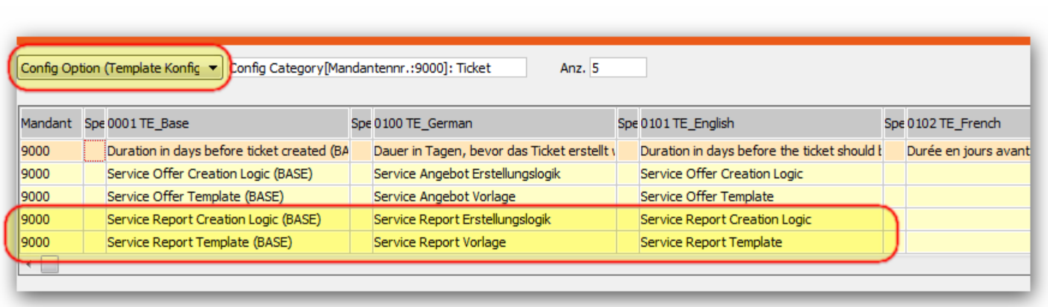
- Config Category: Ticket
- Config Option: Service Report Template
- Text1: Station number of the record
- Text2: Serial number of the record

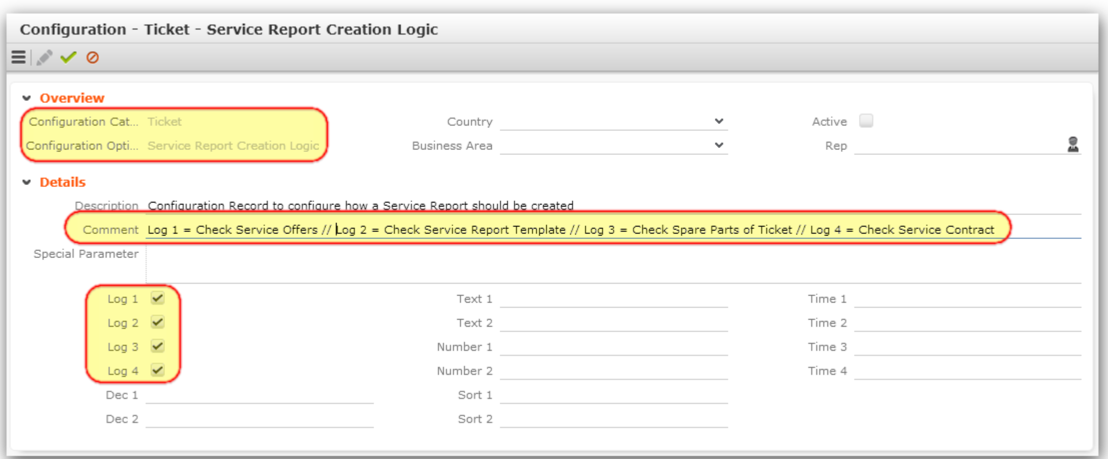
Creation Logic

A special logic is used for creating service reports. This logic is defined in the template configuration table. The administrator can use the flags (Log1 – Log4) to adapt the logic.

There are 2 new template configuration records:

1. Record to define which offer is used as service report template (see above)
2. Record to define the creation logic





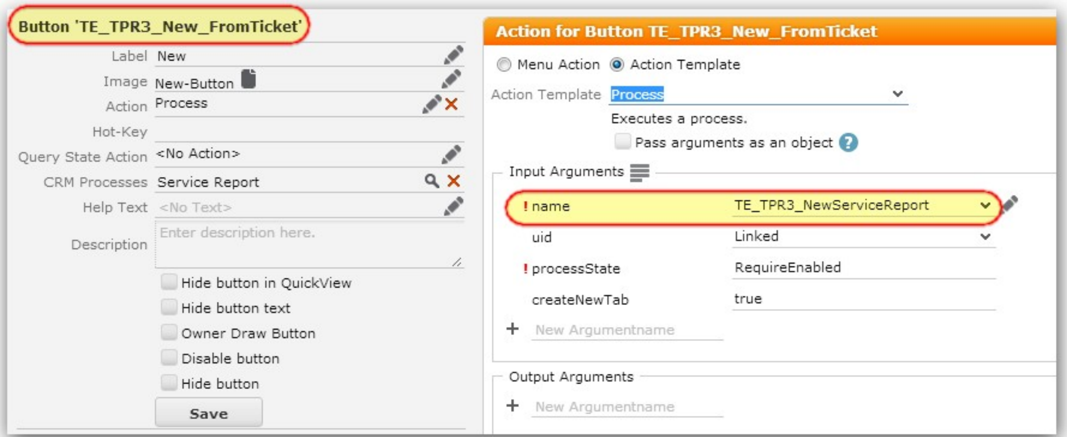
Log1 Service offer(s) are taken as the base for creating the service report

Log2 If a service report template is defined it is used to create the new service report

Log3 Spare parts of the ticket are used and will be added as offer positions

Log4 Check if there is a valid service contract for the installed base which is linked to the ticket. Add service contract items as offer positions.

A new “TE_TPR3_New_FromTicket” button has been created and is displayed in the sub-list of the info area. This buttons calls the “TE_TPR3_NewServiceReport” process which handles a part of the creation logic. Detailed information can be accessed directly in the step description of each step.



This process also calls the “TE_TPR3_CreateServiceReport” workflow which handles the rest of the creation logic and creates the new service report.

Further designer elements which are used in the process:

Process steps:

- TE_TPR3_NewServiceReport_CheckServiceReports
- TE_TPR3_NewServiceReport_ShowProcessAsk
- TE_TPR3_NewServiceReport_CheckCreationLogic
- TE_TPR3_NewServiceReport_CheckServiceOffers
- TE_TPR3_NewServiceReport_SearchServiceOffers
- TE_TPR3_NewServiceReport_CallWorkflow
- TE_TPR3_NewServiceReport_ShowServiceReport

Process ask:

- TE_TPR3_NewServiceReport_Overview

Form:

- TE_TPR3_NewServiceReport_ShowTPR2

Filter:

- TPR2.BaseForServiceReport

Queries:

- TE_A000_ServiceReportCreationLogic
- TE_TPR2_ServiceOffers
- TE_TPR3_ServiceReports

Table caption:

- TE_TPR3_Process

Graph of the Whole Process:

Additional Info: Newly created fields:

PR/5034 (Service Offer No.)

This field is filled if a service offer is used to create a new service report. This field contains the No. (5027) of the service offer.

PR/5044 (Signed)

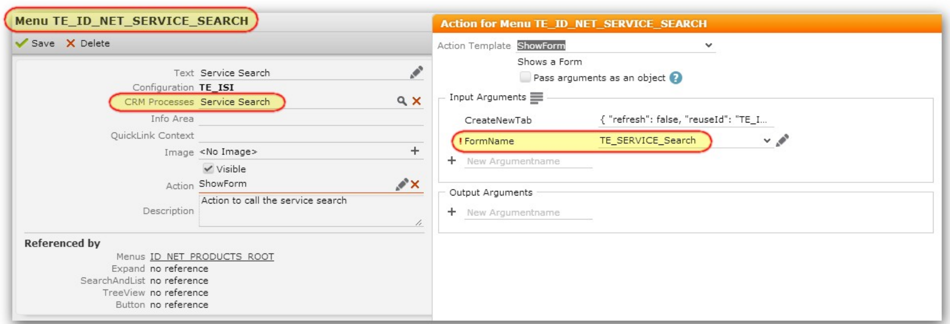
If this new field is “true”, then the “PR_UPD_SetStatusInTPR3” trigger sets the new Status-field (5045) to “Signed”. PR/5045 (Status)

This new catalog is set only withTriggers(PR_UPD_ServiceReportAccount-ing,PR_UPD_ServiceReportSigned, PR_UPD_ServiceReportClosed).

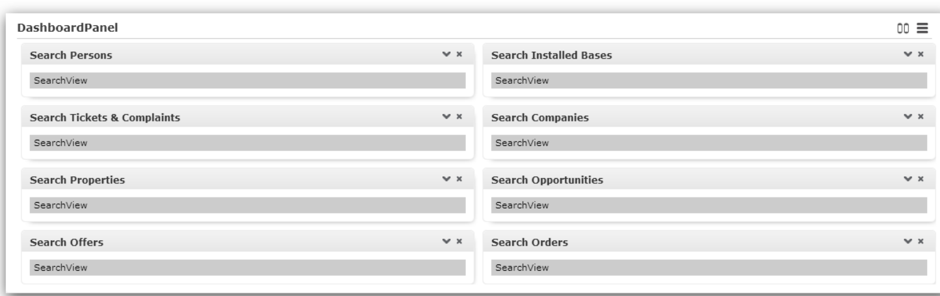
Service Search

Learn about the new application menu entry for service search.

A new application menu entry has been created. This action calls the “TE_SER-VICE_Search” form. The menu action could be hidden by disabling the “Service Search” CRM process in the process configuration of the dependent login role.



The form contains a dashboard panel with 8 Search&Lists of different info areas.



All Search&Lists are using this syntax:

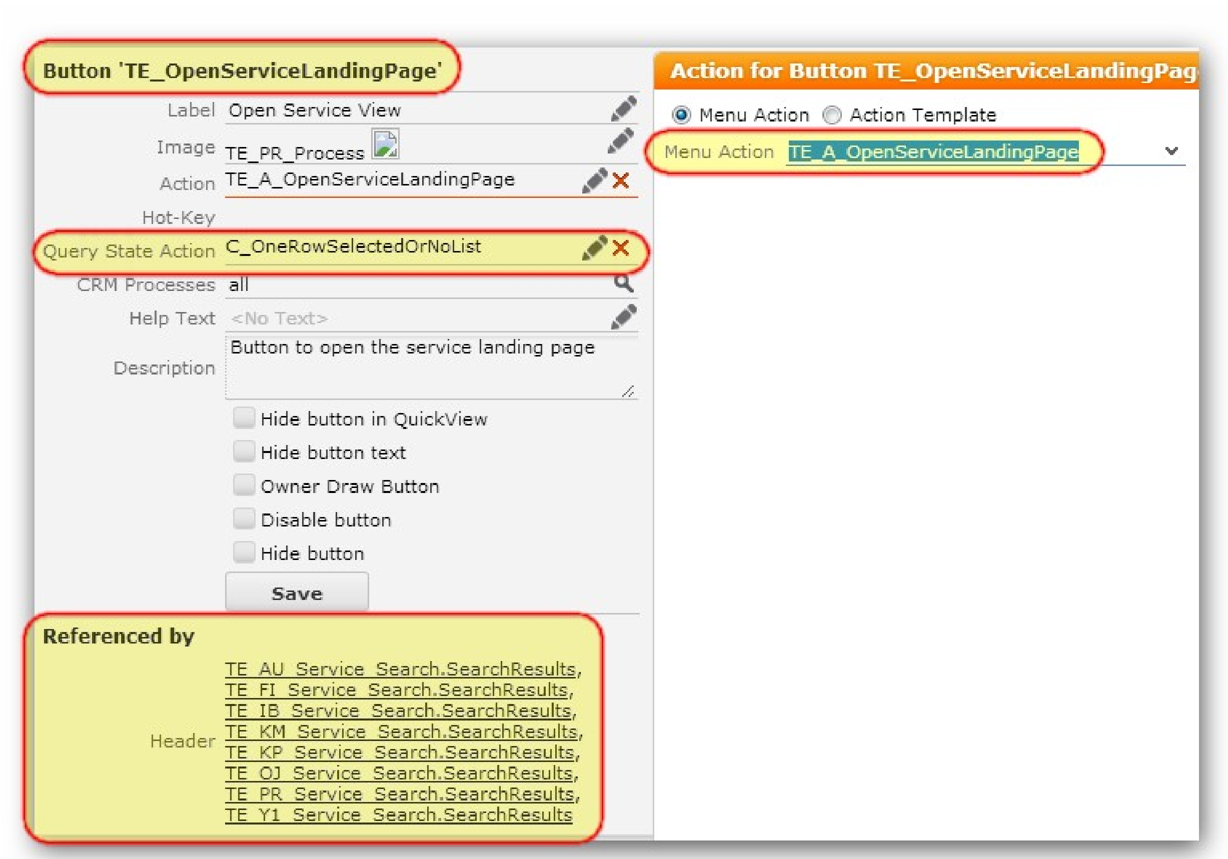
The following Search&List configs have been created:

- TE_KP_Service_Search
- TE_IB_Service_Search
- TE_KM_Service_Search
- TE_FI_Service_Search
- TE_OJ_Service_Search
- TE_Y1_Service_Search
- TE_PR_Service_Search
- TE_AU_Service_Search

All Search&List definitions are using field and header groups with the same name.

All Search&List definitions are using the “TE_A_OpenServiceLandingPage” default action All Search&List definitions are using the “M_Expand” menu

A new “TE_OpenServiceLandingPage” button has been created to simulate the double-click. This button does the same as the default action of the Search&List configuration. The button is active if exactly 1 record is selected.



General

To open the service landing page we are using a process which checks the info area of the record that is delivered by the input message.

The correct expand masks are called depending on this information. This is done via some process steps in combination with a form which uses input parameters delivered by the process.

Process:

- TE_OpenServiceLandingPage

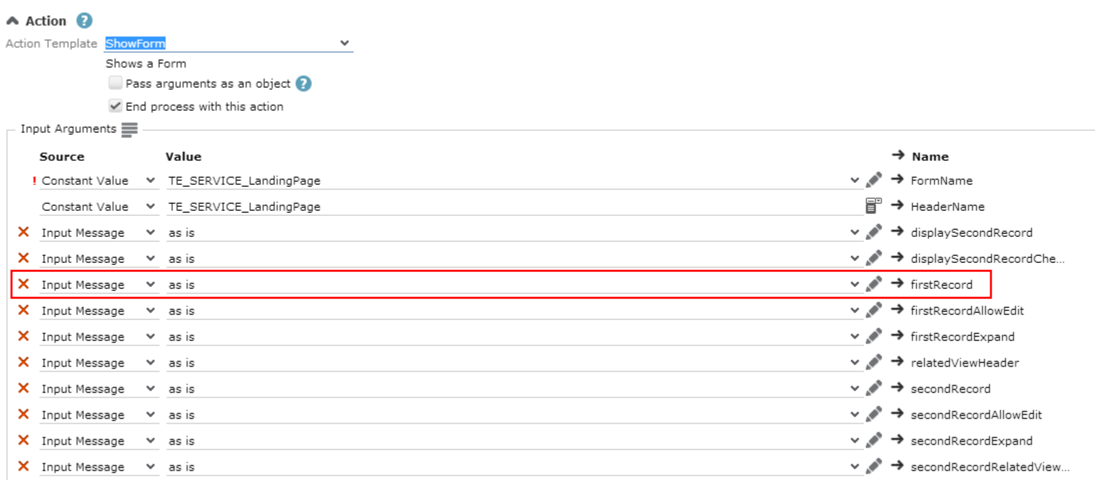
Process Steps:

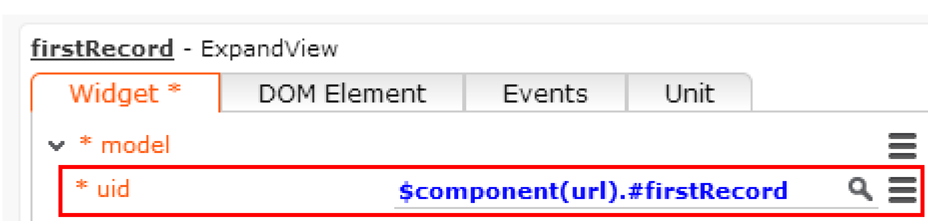
- TE_OpenServiceLandingPage_CheckInfoarea
- TE_OpenServiceLandingPage_GetParent
- TE_OpenServiceLandingPage_ShowForm

Form:

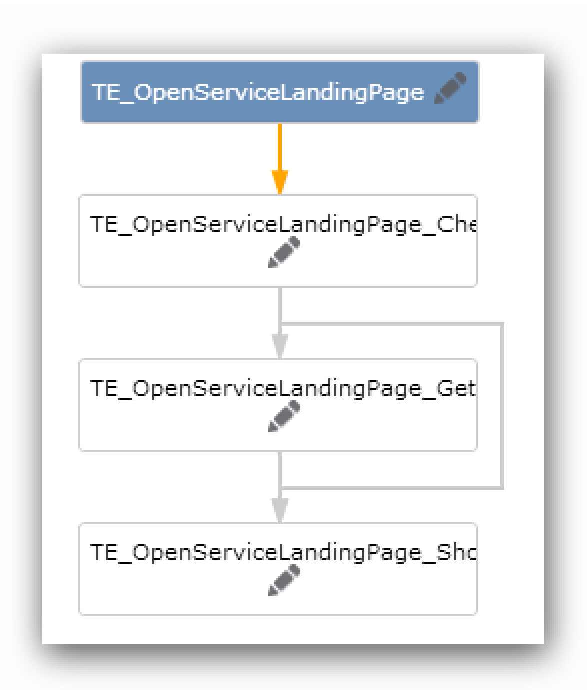
- TE_SERVICE_LandingPage

Data-binding example: Bind Process to Form





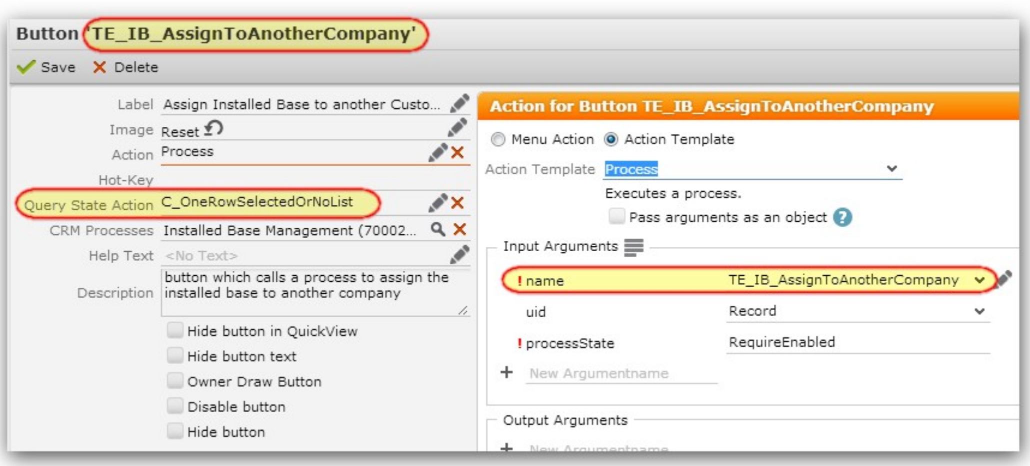
Process Graph:



Special Functionality – Installed Base

We have implemented some special functionalities for the IB (Installed Base) info area on the service landing page.

1st functionality: Assign installed base to another customer



Button:

- TE_IB_AssignToAnotherCompany

Process:

- TE_IB_AssignToAnotherCompany

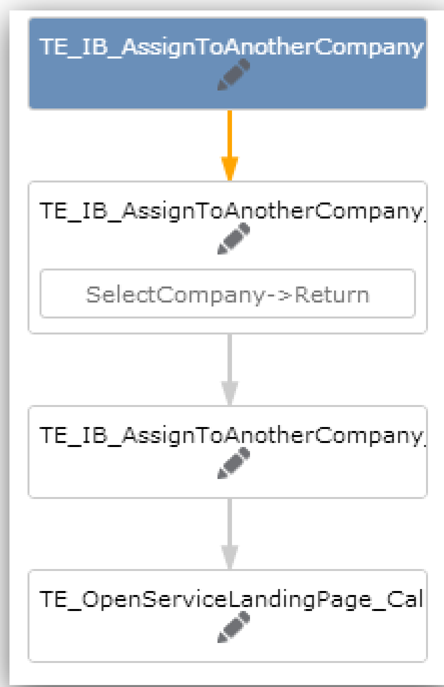
Process Steps:

- TE_IB_AssignToAnotherCompany_SelectFI
- TE_IB_AssignToAnotherCompany_CallWorkflow

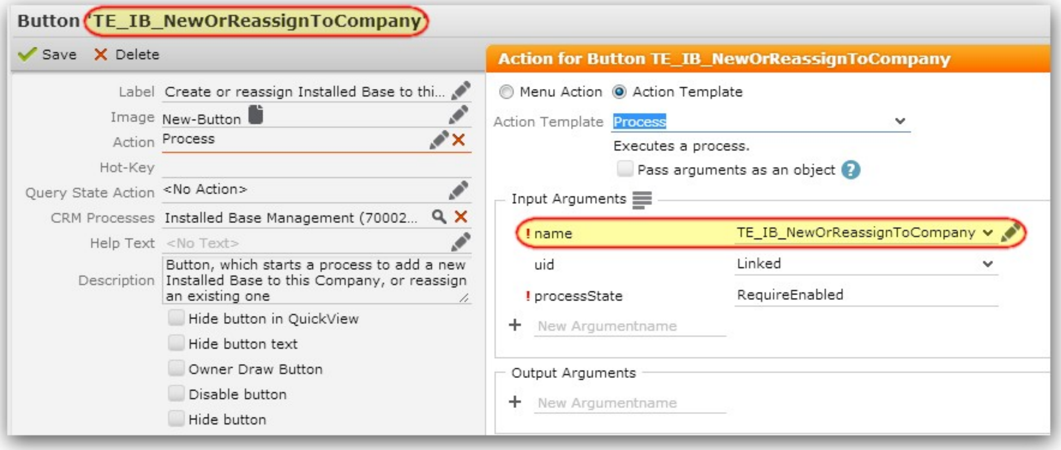
  TE_OpenServiceLandingPage_CallProcess (used to reopen the service landing page)

Workflow:

- TE_IB_ReassignInstalledBase



2nd functionality: Assign an Installed Base to this Customer



Button:

- TE_IB_NewOrReassignToCompany

Process:

- TE_IB_NewOrReassignToCompany

Process Steps:

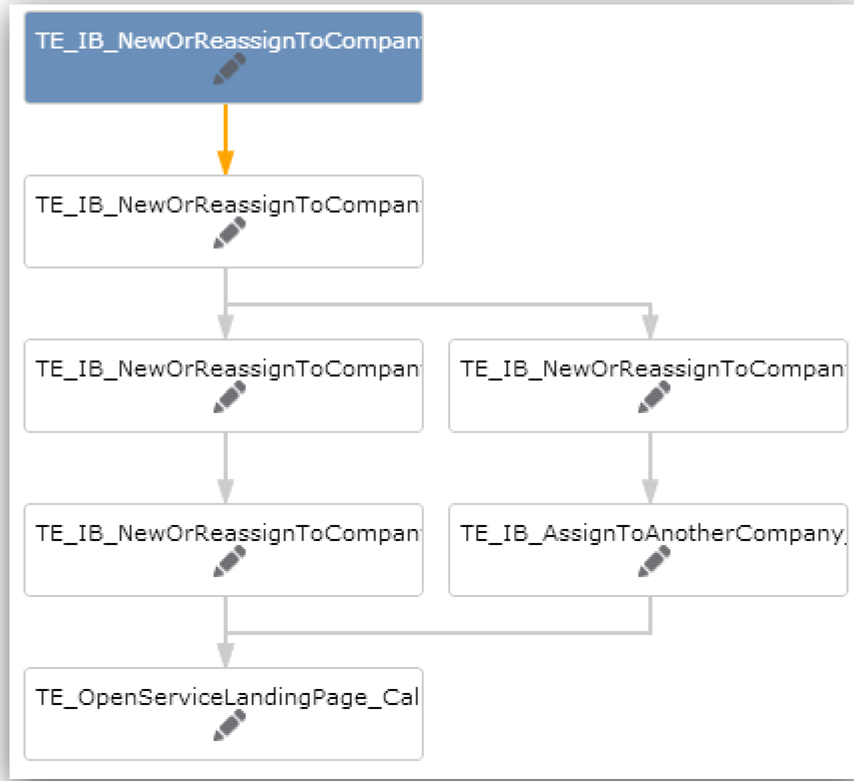
- TE_IB_NewOrReassignToCompany_ProcAsk
- TE_IB_NewOrReassignToCompany_SelectType
- TE_IB_NewOrReassignToCompany_CreateNew
- TE_IB_NewOrReassignToCompany_SelectIB
- TE_IB_AssignToAnotherCompany_CallWorkflow
- TE_OpenServiceLandingPage_CallProcess (used to reopen the service landing page)

Process Asks:

- TE_IB_AddOrReassign
- TE_IB_NewInstalledBase_ProductTyp

Workflow:

- TE_IB_ReassignInstalledBase



4

Administration

Learn about CRM process administration to manage user interfaces.

CRM Processes are used to manage visibility of the user interface (masks, buttons, tabs, actions ...) in the template. Processes make it possible to hide units/elements in the user interface.

Catalog Maintenance(CRM 312600?)

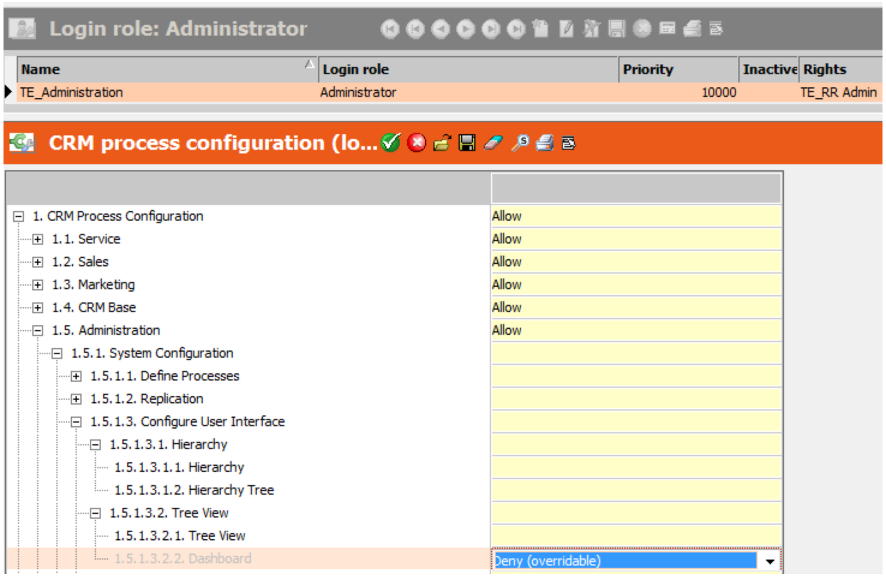
PVCS #73510

In the course of consolidating the Settings menu the **Settings -> Maintenance -> Catalog Maintenance** menu option which uses the catalog maintenance process has been enabled for the superuser only (not the normal administrator rule) by denying it in the CRM process of the administrator role.

Dashboard(CRM 50050030)

PVCS #73510

In the course of consolidating the Settings menu the **Settings -> System Administration -> Application Settings** menu entry which uses the dashboard process has been enabled for the superuser only (not the normal administrator rule) by denying it in the CRM process of the Administrator role.



History

The history for all info areas is activated (see Rights & Triggers for the CM, AK, AD, AN, AG, AO, AX, AI, V1, V2, V3, V4, V5 and V6 info areas). The “History” (H0) info area is configured for the ExpandChildren header of the header groups but they are assigned to the “History” CRM process and are therefore only visible if the user has access to this process.

Notify Rep and All Fields function in Context Menus

The “A_NotifyRep” and “A_ViewAllFields” menu items are defined for all context menus:

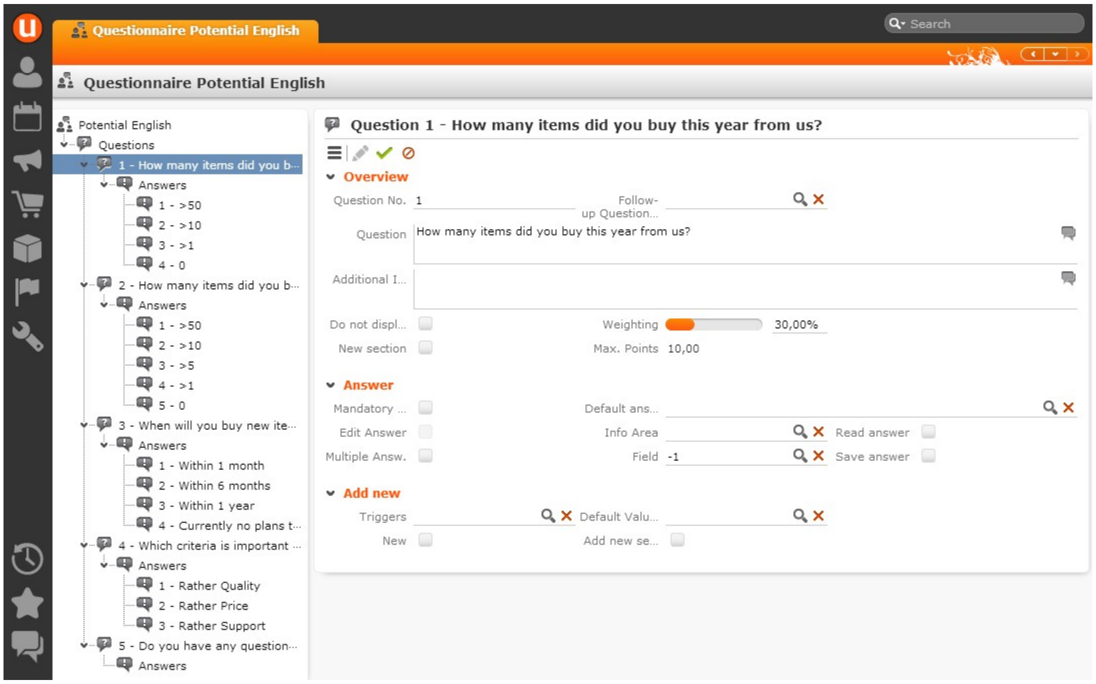
A_NotifyRep	Notify Rep	UPDATE_DEFAULT	all	
A_ViewAllFields	All Fields	TE_CORE	all	

“Notify Rep” is visible in general, “All Fields” is assigned to the “All Fields” CRM process and only visible if the user has access to this process.

Questionnaire(CRM 20000)

PVCS #77849

Questionnaires have their own questionnaire tree so that questions and answers can be edited quickly and in a clear layout.

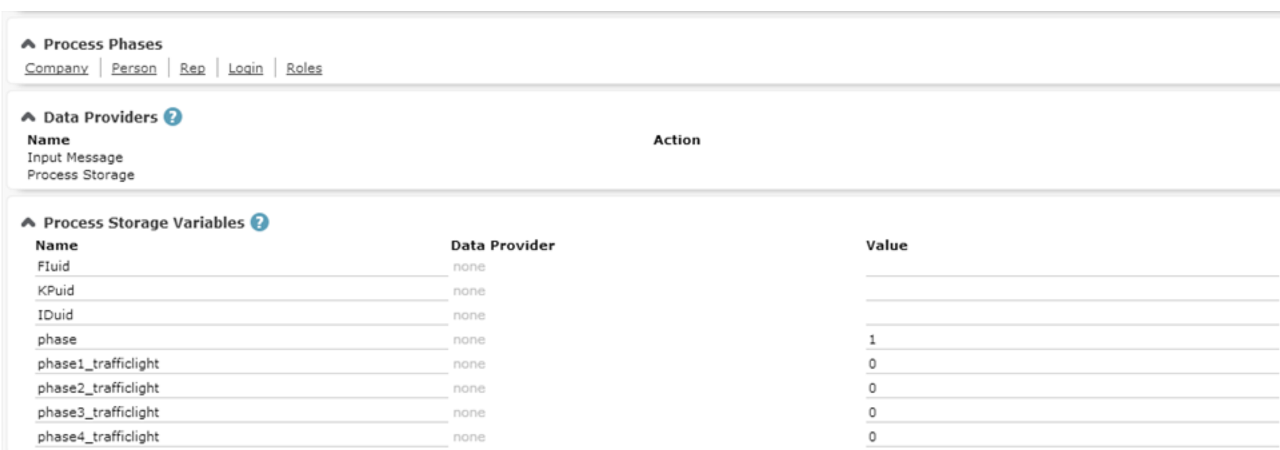


Reps(CRM 50000670)

PVCS #82589

We created a new process called „CORE_ID_New“.

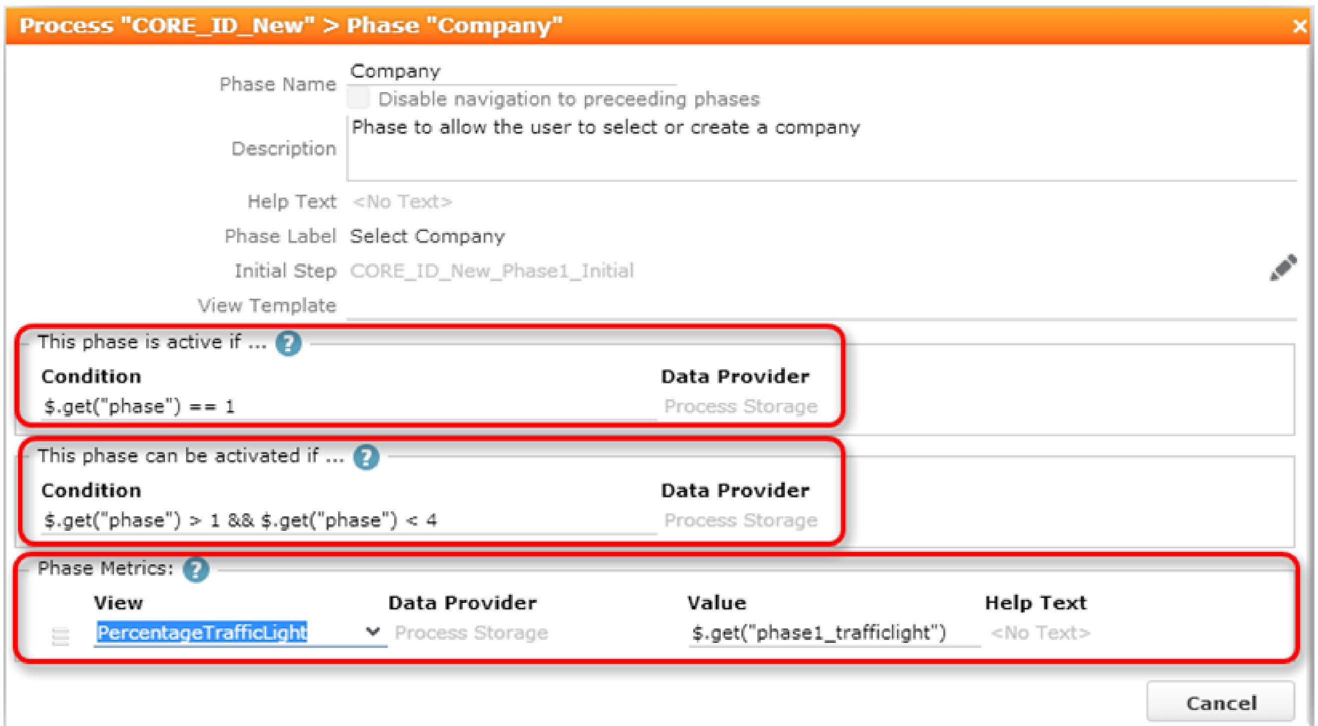
Used process storage variables:



	FIuid	Company which is linked to the rep
	KPuid	Person who is linked to the rep

	IDuid	Rep (after creating the ID record, used as parent for the ES login configuration and R3 rep roles)
	phase	Active phase
	trafficlights	Process storage variables to visualize the traffic light metric for each phase

Phase definition example of phase 1:

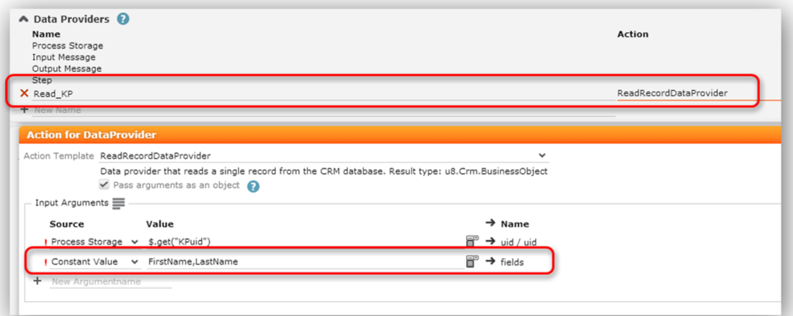


Process Tree:

After selecting a company and a person, the process gets values from the person record in the “CORE_ID_New_ReadKP” step, because we want to set the “FirstName” and “LastName” fields as default value for the field #3 (description) of the new rep record.

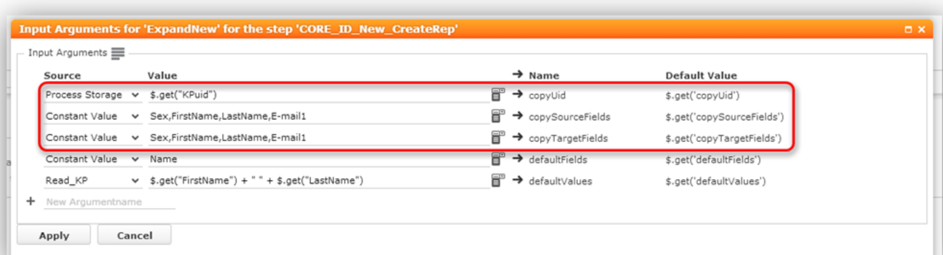
The “CORE_ID_New_Phase1_Initial” step is used if the user clicks on the first phase in the header of the process. If the user steps through the process without clicking on the phase, then this step is not executed.

The “CORE_ID_New_Phase2_Initial” step is not only used when the user clicks on the phase. The step is also used to set the phase and the traffic light variables when moving from phase1 to phase2.



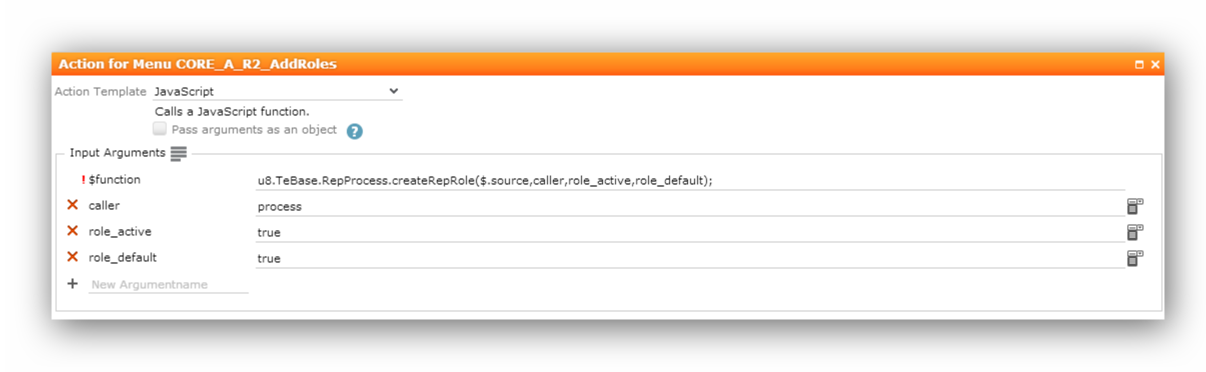
In the dispatching area we are handing the combined string (FirstName + LastName) over to the next step as default value:

Furthermore we are setting some other default values by using the xml names:



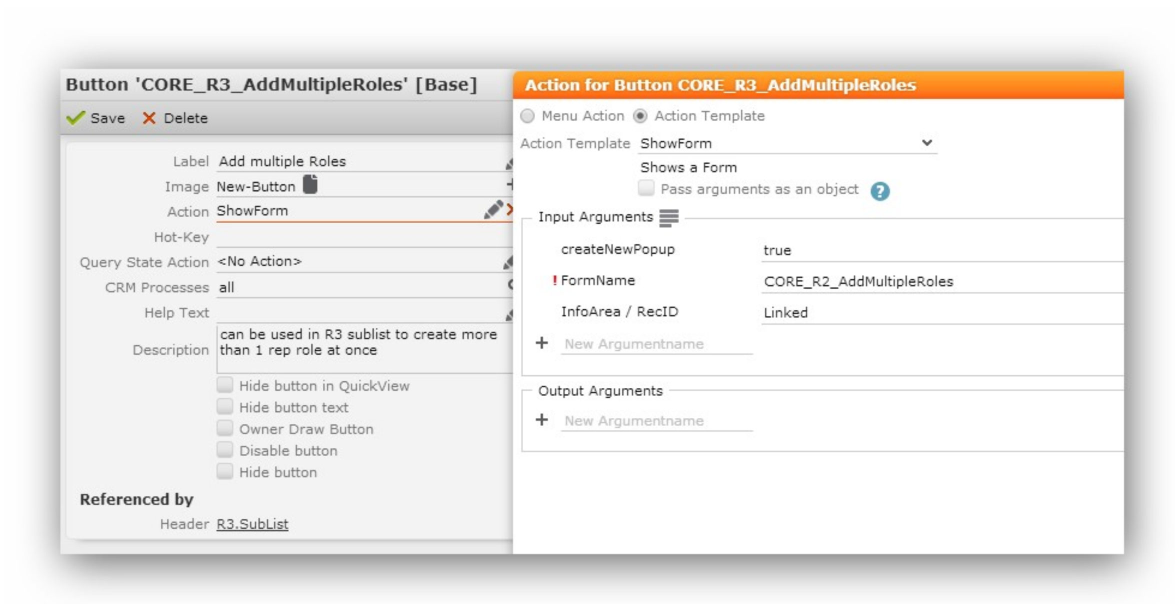
In the “CORE_ID_New_SelectRoles” step we are using a special searchAndList with a special defaultAction and a special contextMenu. This action calls a javascript function which creates rep role record (R3) from the selected login roles. (R2).

In the action itself it is possible to set default values for the role (active flag, default flag).



After creating the roles for the rep we proceed with the **ViewRecord->Exit** step to display the rep record.

We created a new "CORE_R3_AddMultipleRoles" button which is used in the R3 sublist in order to make it possible to create more than one rep role at once.



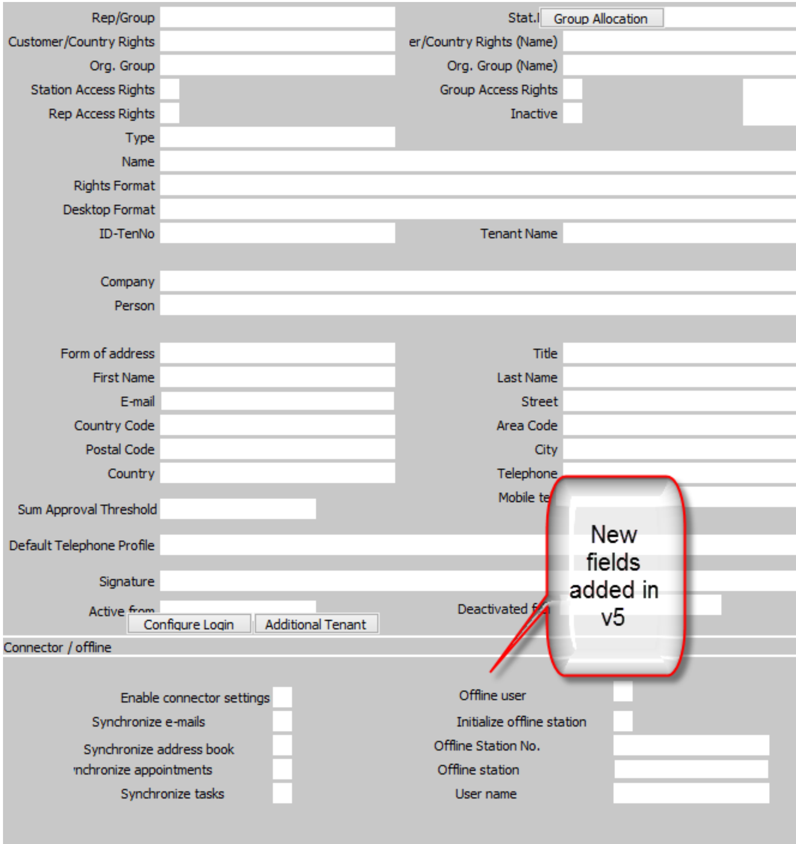
The button opens a form in a popup, displaying a special searchAndList. This is nearly the same functionality as in the process. Javascript used for creating roles: "\web\scripts\te.base\baserepprocess.js".

Reps Masks in windows mmri.exe

A new mask definition was created showing fields needed often for the Aurea connector.

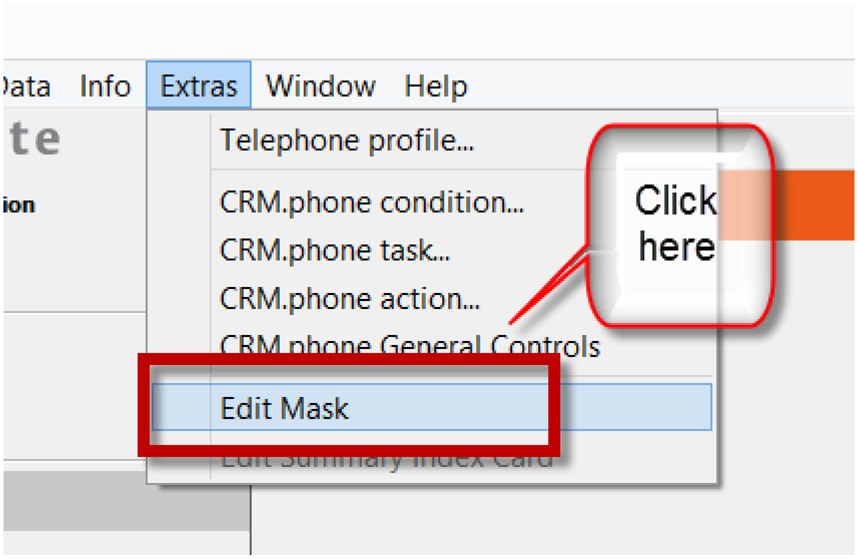
PVCS # 86937

Due to a restriction of the product, the mask needs to be selected by the win user to see it. Please follow steps below:

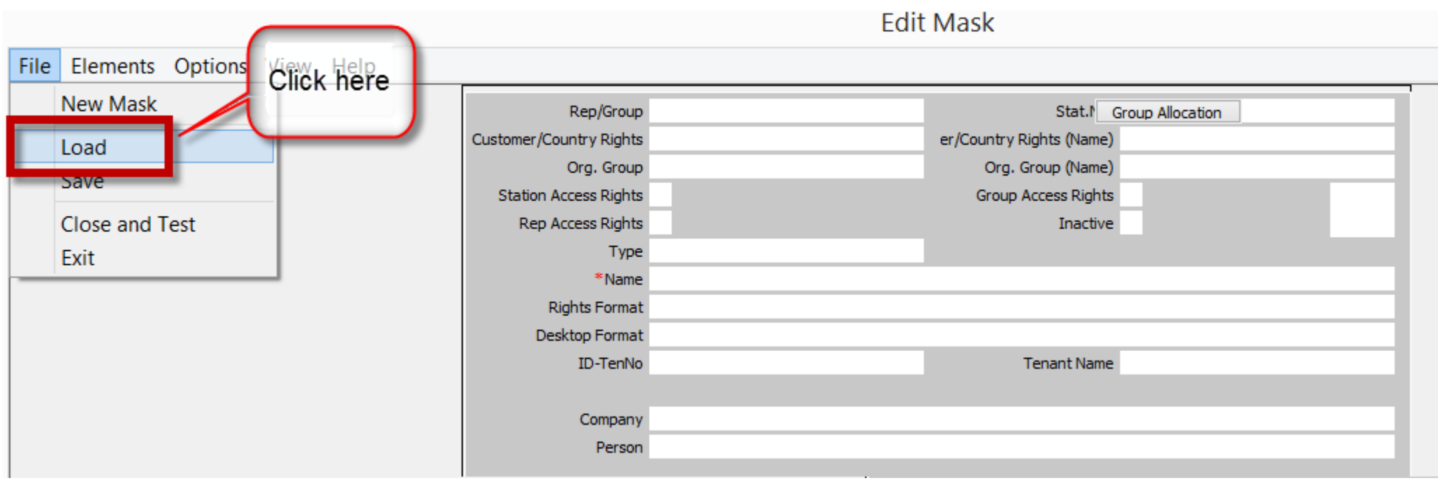


To make use of this mask “ID Maske” you need to go through the following steps:

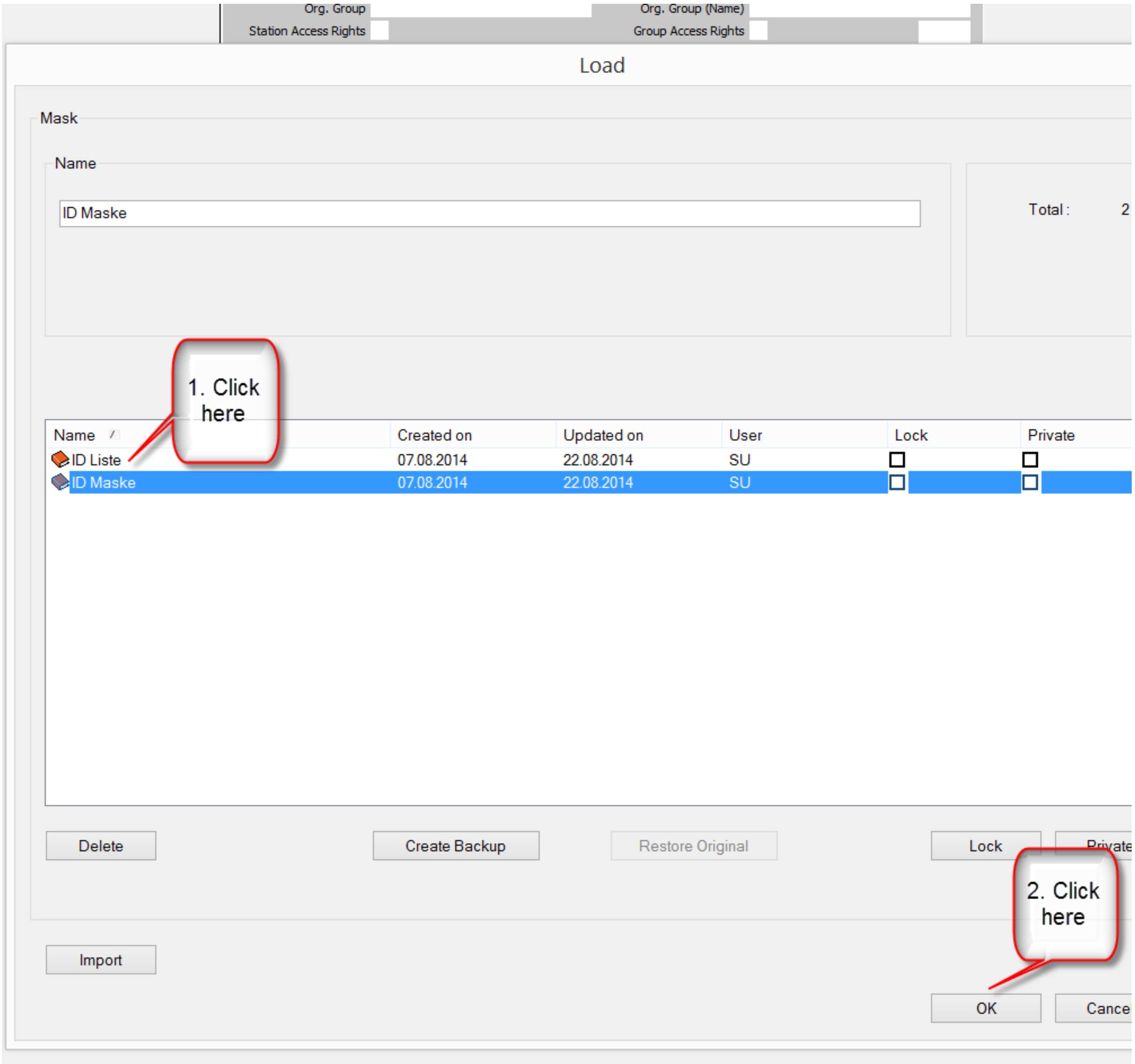
1. Go to Edit Mask in the Extras menu:



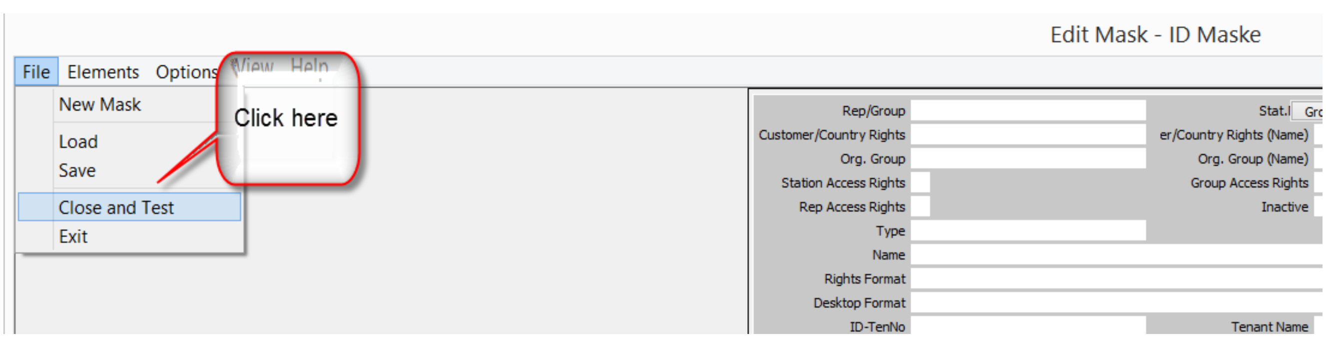
2. Load the mask:



3. Select the mask “ID Maske”:



4. Activate the mask

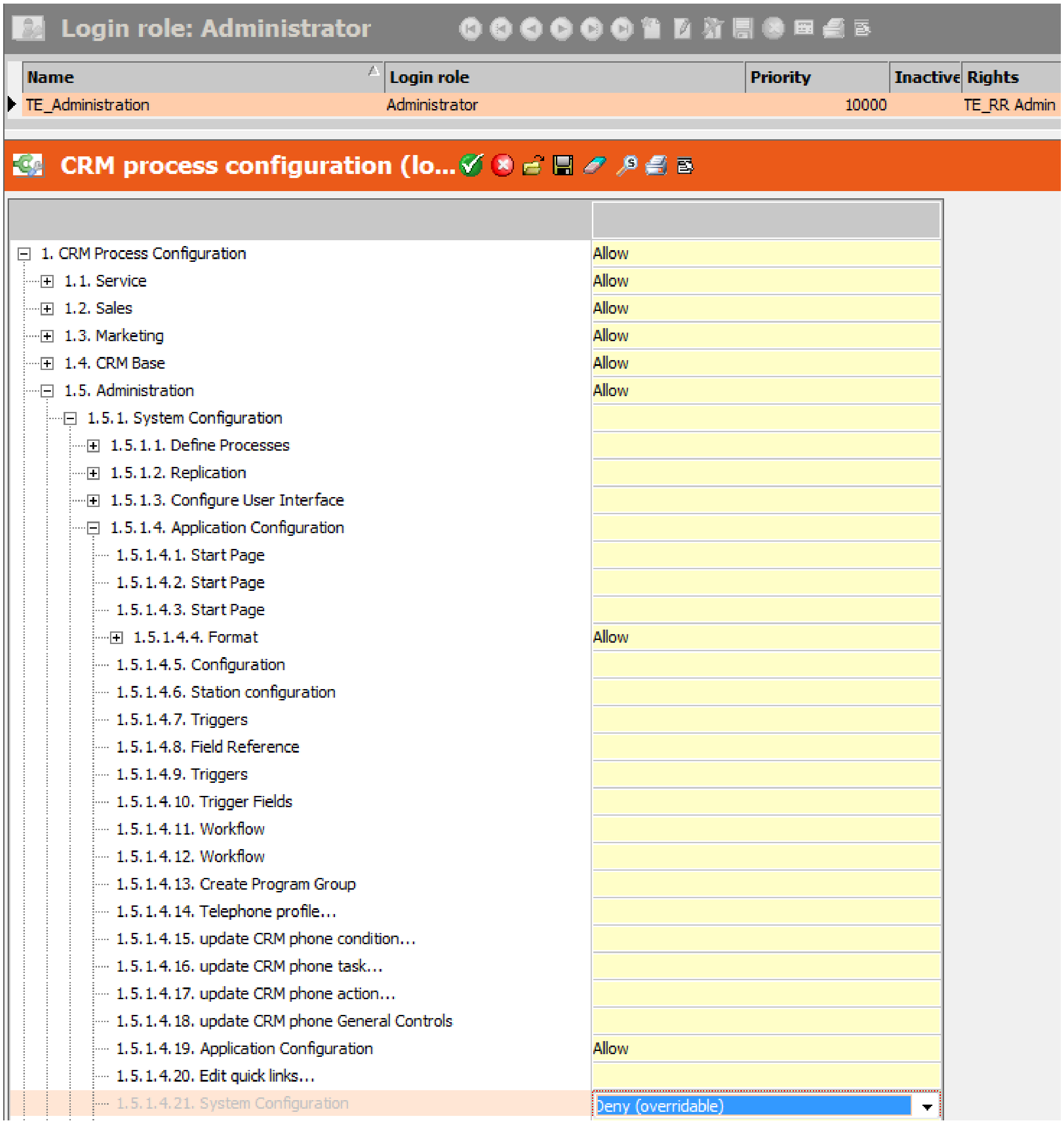


Congratulations, now you should see the new mask. This setting is saved automatically for this win user.

System Configuration(CRM 50050080)

PVCS #73510

In the course of consolidating the Settings menu, the **Settings** > **System Administration** > **System Settings** menu entry which uses the system configuration process has been enabled for the superuser only (not the normal administrator rule) by denying it in the CRM process of the administrator role.



5

Various

Learn about the miscellaneous features of business solution template.

General Structure of Template Processes

Reasons for single process for editing records.

We are delivering only one process for editing records and also for creating new records. (eg. opportunities, offers, tickets). Here are some reasons why this was not split up into 2 processes:

- Only 1 process definition in the designer. If an additional phase should be created, you have to create the phase only for one process and for two.
- We are opening only one process. It is not important if we are opening an existing opportunity or if we want to create a new one. The difference is the call of the process.
- If a new record is created in a separate process, you have to switch to the “real” process after creating this record. By doing this, the whole header and all phases and metrics will be completely refreshed. This does not look very nice.
- The process framework allows us to execute data providers with conditions. Therefore a data provider is not executed if the required records are not available. Therefore it is not necessary to split up a process into two parts.

Important:

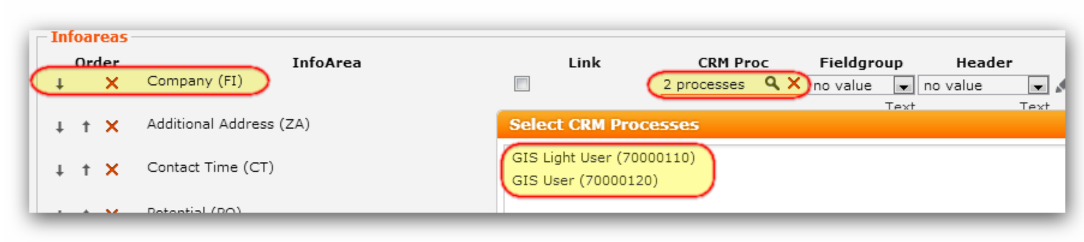
In the offer process, a javascript is used to set the stage of the offer. This will NOT work if the offer is locked via the station right, because the JS code is running with the corresponding user rights. If you want to set the stage, although the offer is locked for editing, use a trigger or workflow.

Note: With the template we’re also delivering a configuration for the CRM.pad (“TE_ISI_TABLET” configuration).

Bing Maps Integration(CRM #70000130)

This topic has information on web and win integration of Bing maps.

Web



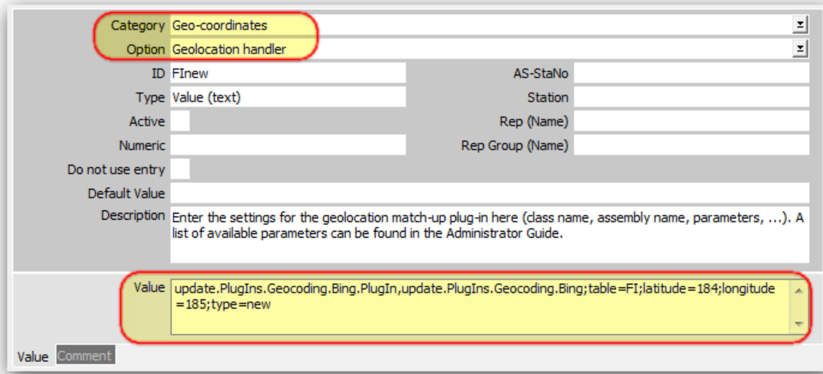
We are displaying the map for the following info areas: Company (FI), Additional Address (ZA) and Property (OJ). The map is displayed as a related data tab:

{ type: "RecordMap", options: { size: { height: 600 } } }

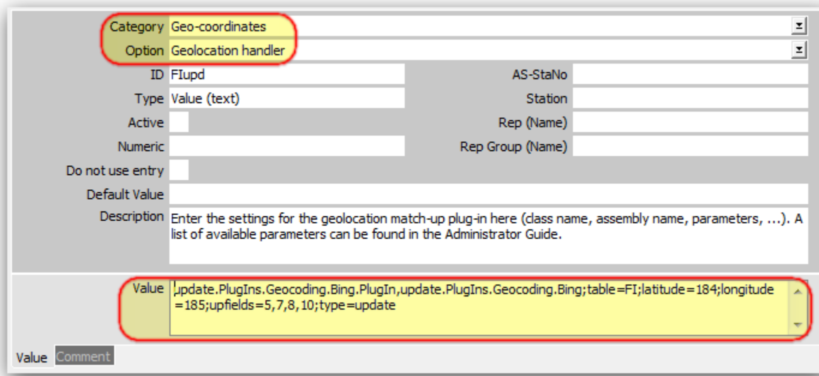
Win

The following configuration records have been defined. Example for FI info area:

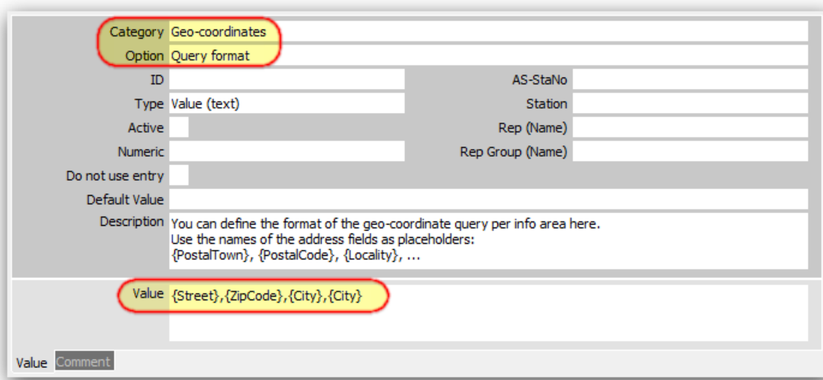
1. Handler for creating new records



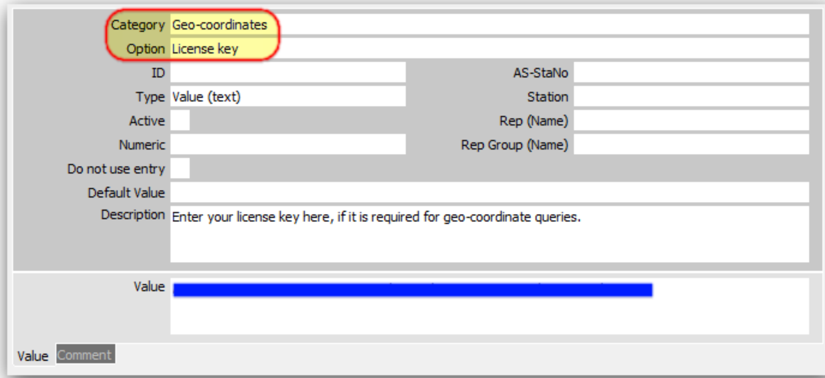
2. Handler for updating existing records



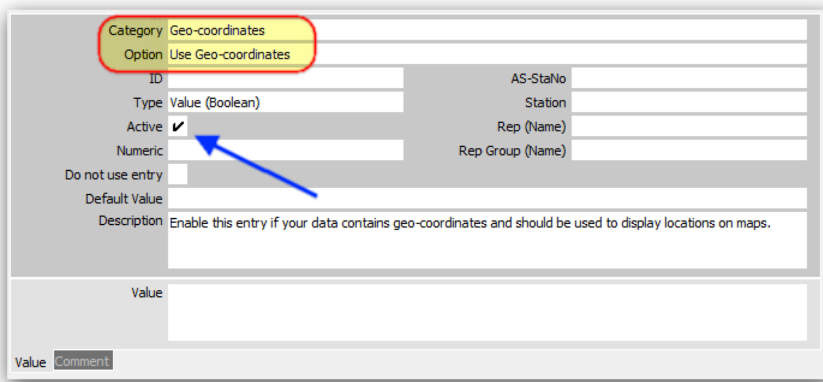
3. Query format



4. License Key



5. A configuration record which defines if the whole geo-coding functionality is active or not



IMPORTANT:

The gps template fields (5xxx or 6xxx) are not used anymore!

The following fields have been renamed and should not be used anymore:

FI 5013, 5014

ZA 6003, 6004

OJ 5023, 5024

Two new login roles have been defined:

TE_GIS	GIS	9500
TE_GIS_Light	GIS_Light	9500

Cascading Style Sheets (CSS)

You get three stylesheets as part of the Business solution template.

Below are the 3 style sheets that you get:

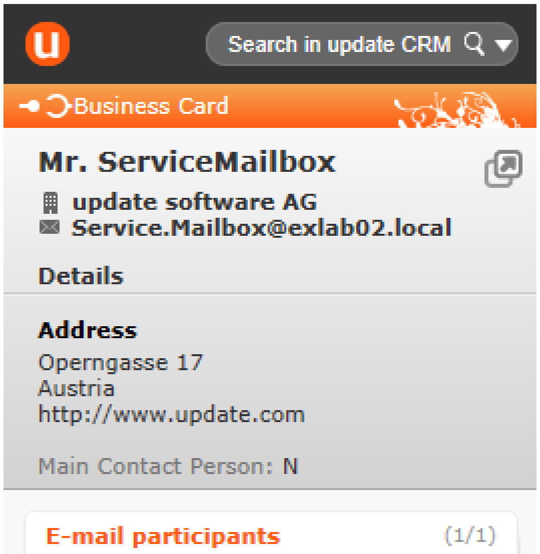
- 1.styles\te.base\update.css
- 2. styles\te.base\custom-color_Example.css
- 3.styles\te.isi\update.css

To make modifications or additions to the styles please rename the custom-color_example.css from the “te.base” directory to custom-color.css. This file will not be overwritten during an upgrade.

ConnectLive

Learn about the fields for record detail view.

General



The following fields are used in the record details view:

FI: Street (10), ZIP (7), City (8), Country (5), Internet (20)

KP: Salutation (0), Academic Degree (1), First Name (3), Last Name (2), Job Title (5), Function (13), Position (12), Date of Birth (30), Main Contact Person (5007)

MA: Type (0), Status (1), Subject (103), Date (2), Time (3), Time End (6), Rep (115), Text (23)

KM: Subject (90), Status (25), Type (5023), Priority (61), Due Date (57), Current Owner (50), Service Level (5019), Problemgroup (4), Productgroup (29)

OJ: Property Name (5), Status (5012), Type (3), Street (10), Zip (7), City (8), Probability (81),

Start (57), Projectmanager (15)

Y1: Opportunity Name (6), Level (9), Status (16), Probability (37), Type (8), Account Manager (159), Completition Date (43), Total Product Value (145)

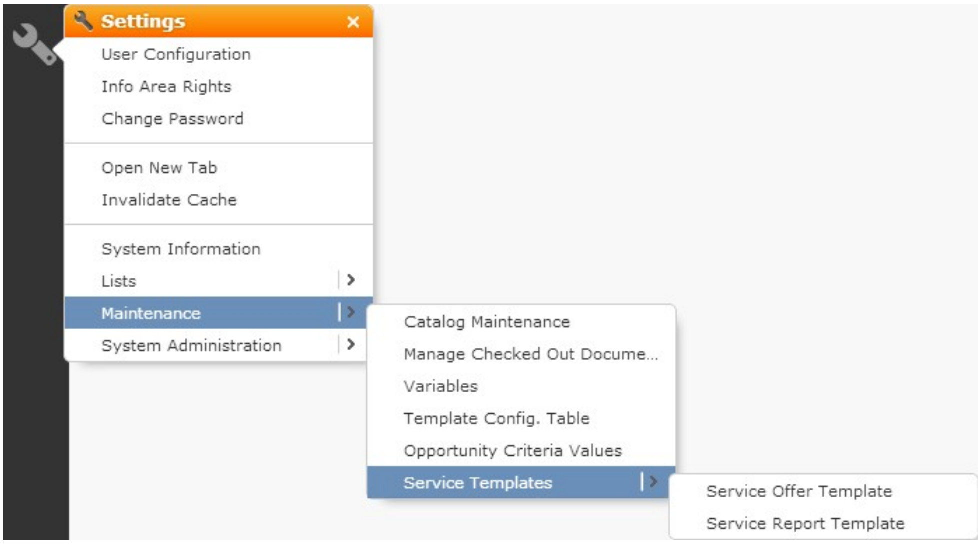
Additionally, the following info areas can be searched through the search in the top-right corner of the add-in: KM, OJ, Y1.

Consolidated Settings Menu

Learn about the dedicated Settings menu created for the template called ”TE_ID_NET_SETTINGS”.

It consolidates selected entries from 'ID_NET_SERVICES' (Settings) and 'ID_NET_WEBDESIGNER' (Administration).

Additionally, a new RoleRight has been created to differentiate between a customer admin and a superuser account.



Corporate Currency for Reports and Analysis

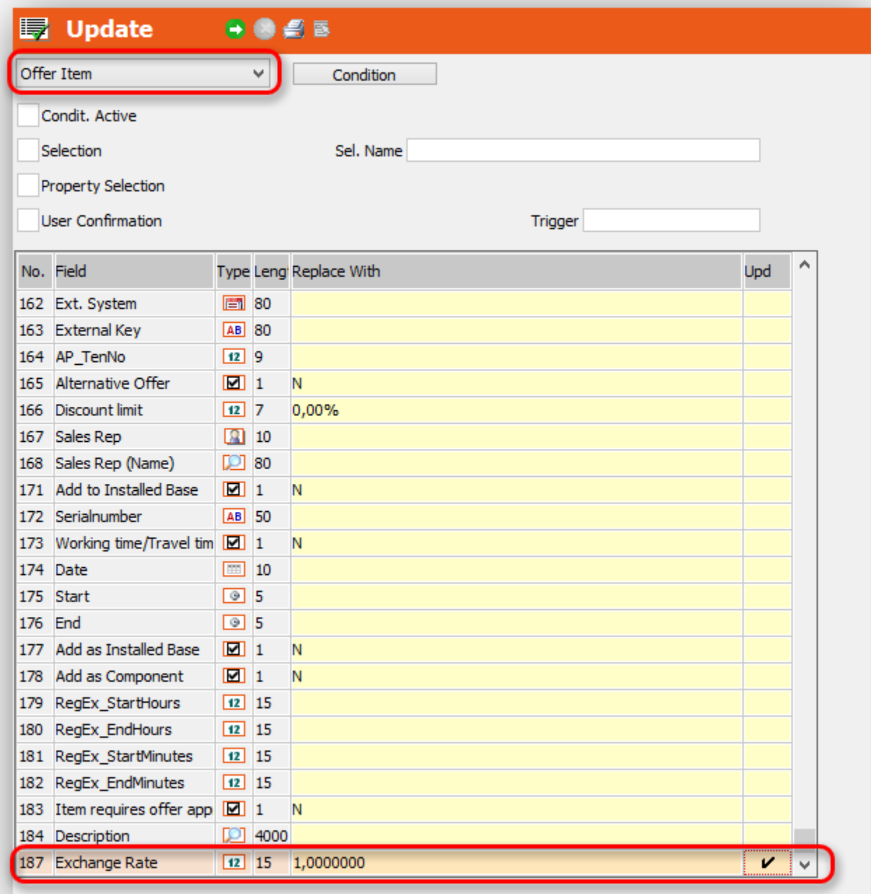
Learn about the Version 4 special currency fields for reports and analysis.

Every report/analysis using following infoareas has been changed: Y1, Y5, PR, AP, AU, UP, OJ, PO

Infoarea	Standard Field	New Corporate Currency Field
Y1	145	5046
Y1	147	5047
Y5	6	5000
Y5	7	5001
PR	13	5046
PR	167	5047
AP	19	5026
AP	112	5027
AU	11	5006
AU	140	5007
UP	17	5001
UP	87	5002
OJ	26	5038
PO	5	5001
PO	2	5003

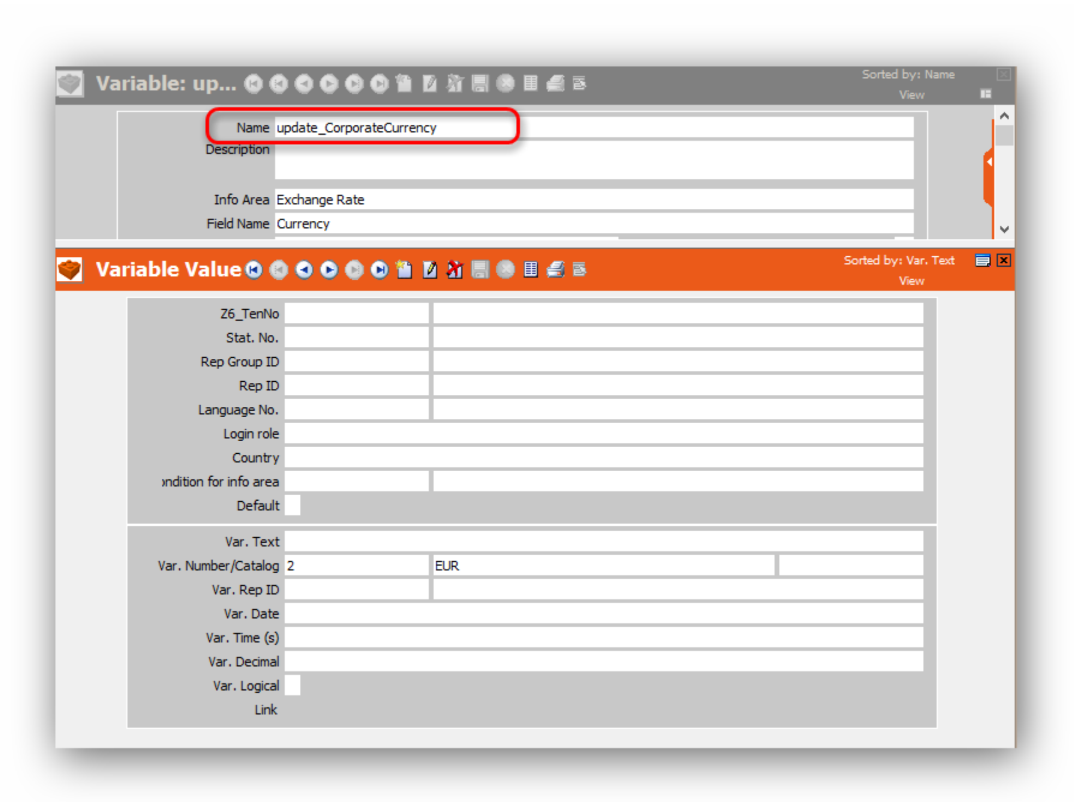
PO	3	5005
PO	4	5007

To make sure that the new fields are filled, you have to execute a maintenance run for the infoareas mentioned above and set the field “Exchange Rate (4025)” to 1. This only makes sense, if a customer is using one currency (eg. only EUR)



If you don’t want to use the corporate currency feature in your project, you just have to define the variable “update_CorporateCurrency” with a variable value using the currency of your project.

After doing this, the exchange rate is automatically set to 1 and the value in both fields is the same.


Variable: up...
Sorted by: Name
View
Name update_CorporateCurrency
Description
Info Area Exchange Rate
Field Name Currency
Variable Value
Sorted by: Var. Text
View
Z6_TenNo
Stat. No.
Rep Group ID
Rep ID
Language No.
Login role
Country
ondition for info area
Default
Var. Text
Var. Number/Catalog 2 EUR
Var. Rep ID
Var. Date
Var. Time (s)
Var. Decimal
Var. Logical
Link

There are 4 scenarios:

1. Upgrade (customer uses only 1 currency)
   - Execute a maintenance run for the infoareas mentioned above and set the field “Exchange Rate (4025)” to 1. Reports and analysis of the template can be reused, because we’re displaying the new fields.
2. Upgrade (customer uses more than 1 currency)
   - Customer specific adaptions (fields, reports, analysis, ...
3. Initial (customer uses only 1 currency)
   - The feature should be activated, so that the new fields get filled. Reports and analysis of the template can be reused, because we’re displaying the new fields.
4. Initial (customer uses more than 1 currency)
   - The feature should be activated, so that the new fields get filled. Reports and analysis of the template can be reused, because we’re displaying the new fields.

Changing Template Records

List of info areas whose records can be changed.

Records of the following info areas can be changed:

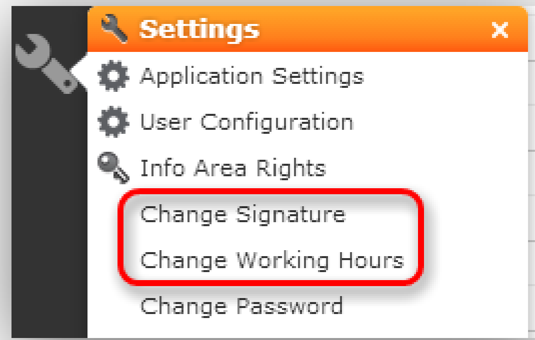
- Z6
- M1
- MC
- R2
- AS
- A000
- A001

If these records are changed on a station <10000 then the records are not updated during the next template upgrade.

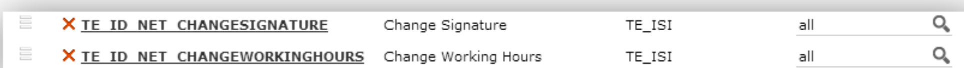
Change Signature & Change Working Hours

Learn how to change signature and working hours from the settings application menu.

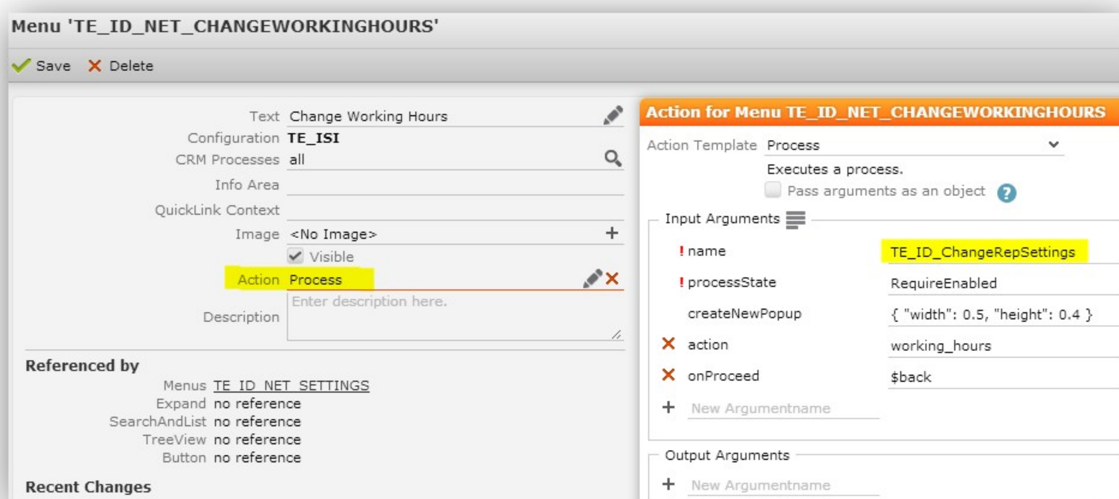
From the Settings application menu it is possible to change the signature and the working hours of the currently logged on rep:



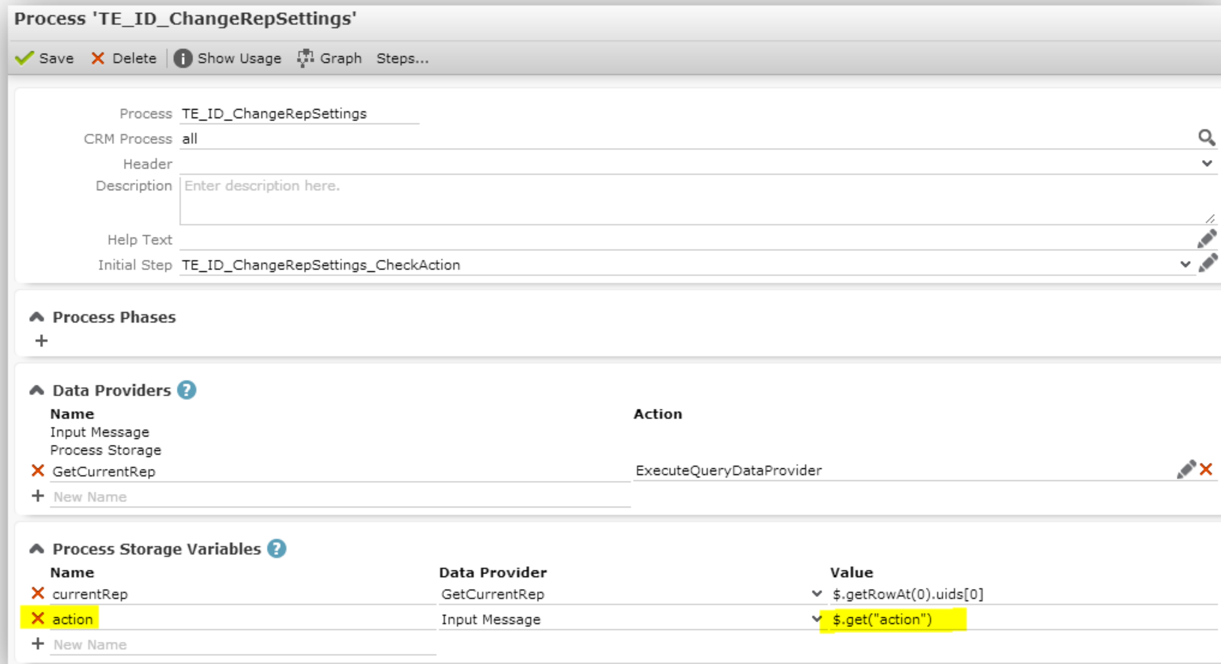
New application menu actions:



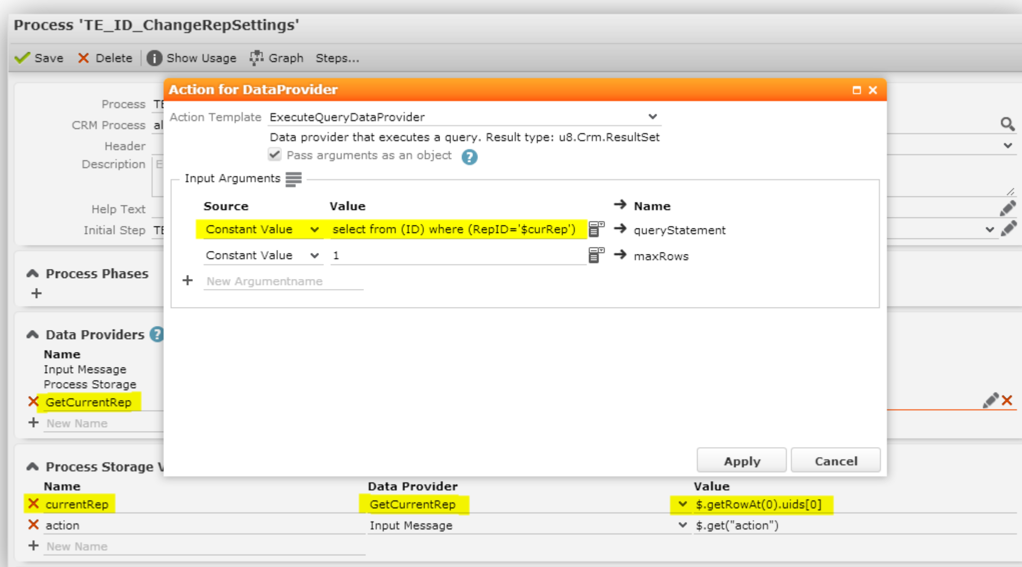
For both actions we're calling the same process:



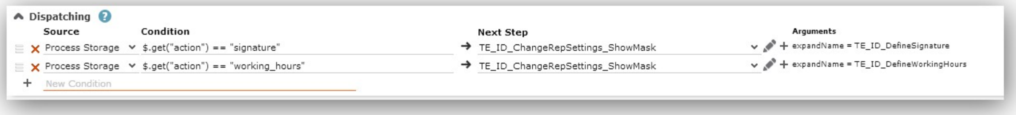
The difference between the processes is the value of the parameter "action"



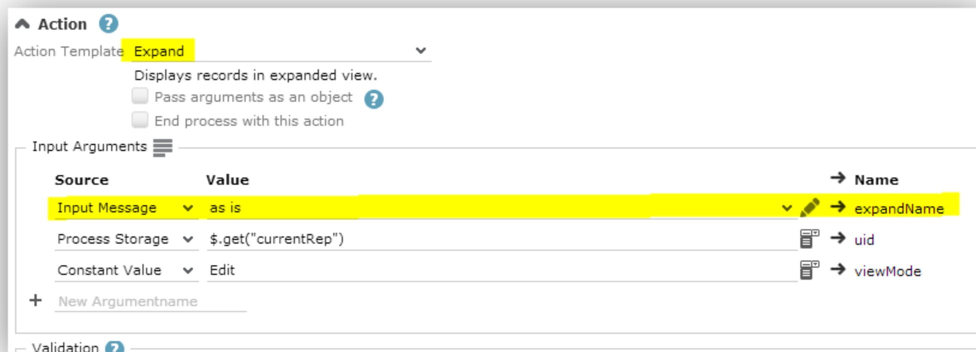
We defined an own data provider to get the current rep:



At the initial step we’re checking the value of the “action” parameter. Afterwards we’re dispatching to the same step, but with different input arguments:



The last step is displaying a specific expand:



Used expands:

TE_ID_DefineSignature

TE_ID_DefineWorkingHours

Deactivated Template Processes

List of deactivated template processes.

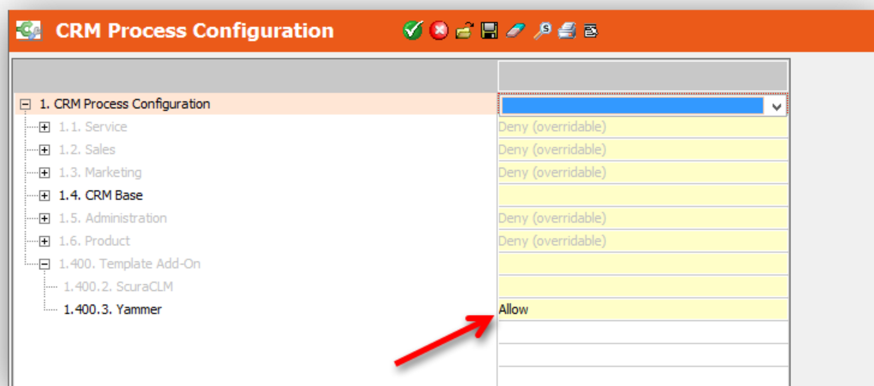
We are delivering a lot of CRM processes with the template. The following processes are deactivated by default:

Process Name	Process ID (Tree)
QlikView	1.4.7.400
Scura CLM	1.400.2
GIS (Bing Maps)	1.5.2.5.2

Process Name	Process ID (Tree)
Expenses	1.4.10 | 1.4.10.400
Property Matchup	1.2.401
Lead Management	1.3.6
Social Inbox	1.4.6.3.1
Social Ticket Management	1.1.1.1.19 | 1.1.1.1.20
Social Product (eg. Idea Management)	1.6

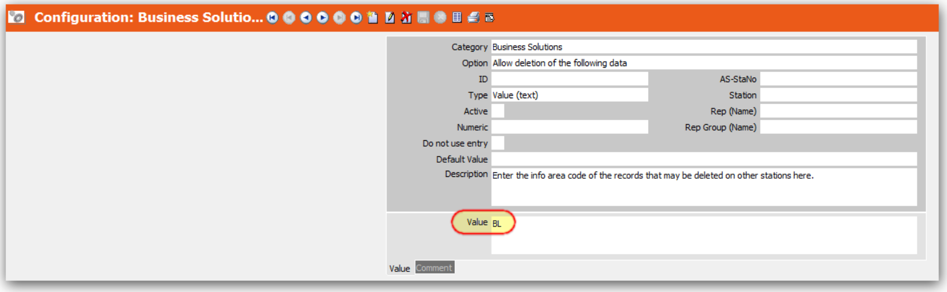
Every process can be activated in our own global process configuration or in the process configurations of our roles (eg. Sales).

Example: Allowing the “Yammer” process.



Deleting Template Records

Since version 2 it is possible to delete records which are delivered by the template. This could be defined via a configuration record.



Therefore it is possible to delete records of the “BL” info area in customer projects.

Exchange Connector

Learn about the general and technical aspects of configuring exchange connector on ISI template.

General

The standard Aurea CRM exchange connector product has been adapted to allow the following functionality in the ISI template:

#	Action	Outlook	CRM	Direction	Result
1	New	Appointment	Activity (Visit)	Outlook to CRM	A link to the CRM item appears in the text after the synchronization The location is transferred from Outlook to CRM The reminder duration is transferred from Outlook to CRM
2	New	Appointment	Activity (Visit)	CRM to Outlook	The appointment is created in both systems
3	Update	Appointment	Activity (Visit)	Outlook to CRM	The appointment is updated, e.g. new time in both systems
4	Update	Appointment	Activity (Visit)	CRM to Outlook	The appointment is updated, e.g. new participant in both systems
5	Delete	Appointment	Activity (Visit)	Outlook to CRM	The appointment is flagged with "Connector deleted" in CRM
6	Delete	Appointment	Activity (Visit)	CRM to Outlook	The appointment is deleted in both systems.

#	Action	Outlook	CRM	Direc-tion	Result
7	New	Email	Activity (Email)	Outlook to CRM	Appointment/E-mail in both systems
8	New	Email	Activity (Email)	Outlook to CRM	E-mail has attachment Complete e-mail is stored as ".msg" file as linked document
9	New	Email	Activity (Email)	Outlook to CRM	The e-mail is stored in a folder in Outlook with the syntax “NameOP Y1-Stationnr-Serialnr” Appointment is linked to Opportunity (prerequisite: OP participant with this e-mail address needs to be linked to opportunity)
10	New	Email	Activity (Email)	Outlook to CRM	With e-mail address not existent in CRM as FROM --> E-mail is flagged with "Missing participants" and the email address is listed in the body. The e-mail is linked to "TO" - the Rep.
11	New	Email	Activity (Email)	Outlook to CRM	With e-mail address not existent in CRM as CC --> E-mail is flagged "Missing participants" and the missing participants are listed in a separate field. E-mail is linked to "FROM" person.
12	New	Email	Activity (Email)	Outlook to CRM	E-mail is sent to the service mailbox (This e-mail address is assigned to “Service User” rep (for Exchange Connector)) --> is automatically synchronized and a ticket is created.
13	New	Email	Activity (Email)	Outlook to CRM	E-mail that is sent to service mailbox is automatically synchronized. It contains ‘Ticket #’ followed by a ticket number in the subject line. The appointment is linked to the existing ticket (no new ticket is created!).
14	New	Task	Task	CRM to Outlook	Task is present in both systems. With Aurea CRM there are 2 new catalog fields: “InProgress” and “Approved”.
15	Update	Task	Task	CRM to Outlook	Task updated in Outlook.

#	Action	Outlook	CRM	Direction	Result
16	Update (status)	Task	Task	Outlook to CRM	Change status in CRM (only status change in Outlook - nothing else possible).
17	Delete	Task	Task	CRM to Outlook	Task deleted in both systems.
18	New	Contactperson	Person	CRM to Outlook	Prerequisite: Either person record has been added as favorite or person has rep entered in AD field, which is the owner of the mailbox [This is defined in http console]--> persons (KP) are transferred. The following fields are included: First name, Last name, Telephone (Company), Telephone Homeoffice, Mobile, Fax, Fax (Company), Email 1, Birthday, Position, Company Name, Company Street, Company Zip code, Company Country).
19	Update	Contactperson	Person	CRM to Outlook	Only one direction from CRM to Outlook possible
20	New	Absence	Activity	CRM to Outlook	Absence is created as an appointment with the “Holiday” type.
21	Update	Absence	Activity	CRM to Outlook	Absence is updated.

Technical

The following files have been adapted to implement the functions in the ISI template. These files contain no customer-specific configuration as e.g. user, exchange server name.

All customizations are prefixed with “Customised”.

All activations, i.e. standard functionality, which are not active by default, are prefixed with “Activated”.

Connector files:

\<Connector Installation directory>\FieldMapping.xml

\<Connector Installation directory>\SynchroConnectorConfig.xml

Interface files:

\<Interface Installation directory>\xml\Forms.xml

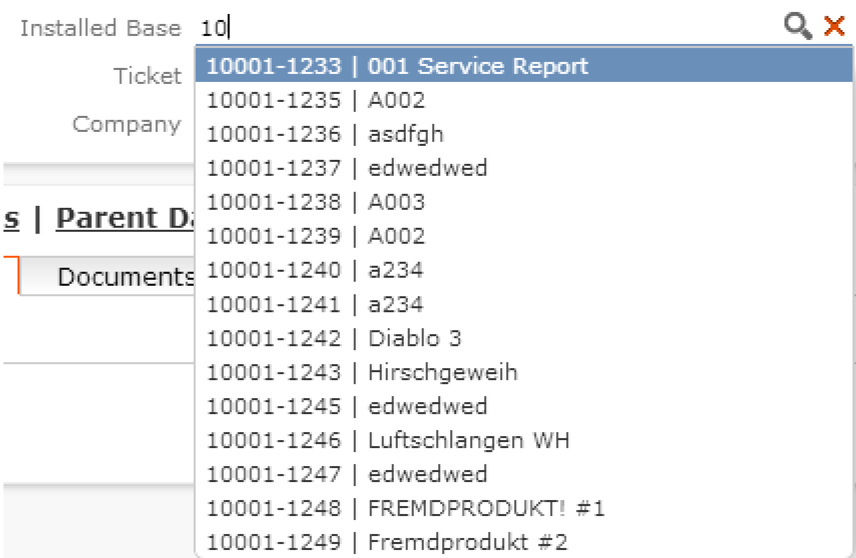
\<Interface Installation directory>\xml\SyncML_gw2mm.xslt

\<Interface Installation directory>\xml\SyncML_mm2gw.xslt

While setting up the Exchange connector please also refer to the Technical Guides of Connector and Interface on our help.aurea.com website.

Find-As-You-Type

Learn about the FAYT (Find-As-You-Type) search feature.



The FAYT feature has been implemented globally for all expand masks which use select functions for the following info areas:

Appointment (MA), Company (FI), Components (KO), Construction Project (OJ), Construction Project Competitor (OM), Construction Project Participants (OB), Installed Base (IB), Offer (PR), Opportunity (Y1), Opportunity Participant (Y2), Order (AU), Other Address (ZA), Property Management (OZ), Service Contract (WR), Spare Part (U022), Ticket (KM)

HTML Text Fields

HTML text fields were implemented in the Activity (MA), Activity Templates (A031) and Configuration Translation (A001) info areas. New fields: MA: ID 5044 referencing the standard text field ID 23 A031: ID 6008 referencing the old text field ID 6003 A001: ID’s 6008 and 6009 referencing the old text field ID’s 6006 and 6007 New text fields have been created in the data model for that purpose which hold the new HTML formatted text This text is automatically copied (and stripped of HTML tags) by the business logic to the referenced non-HTML fields for legacy reasons (eg. clients which do not support text formatted in HTML). To add the button “Add Signature” to a HTML field, please enable the Field Attribute “Add Rep Signature” on the field in the designer:

JavaScript Callback Functions

Learn how to use JavaScript Callback Functions to perform some actions after executing a trigger or a workflow.

There are some callback functions which should be reused. JavaScript file: “isicall-backfunctions.js”.

refreshList

Parameter: source

Call: u8.TeISI.CallbackFunctions.refreshList($.source)

showInfoMessage

Parameter: textGroupName, messageTextNo, commentTextNo

Callu8.TeISI.CallbackFunctions.displayMessage("textGroupName",messageTextNo, commentTextNo)

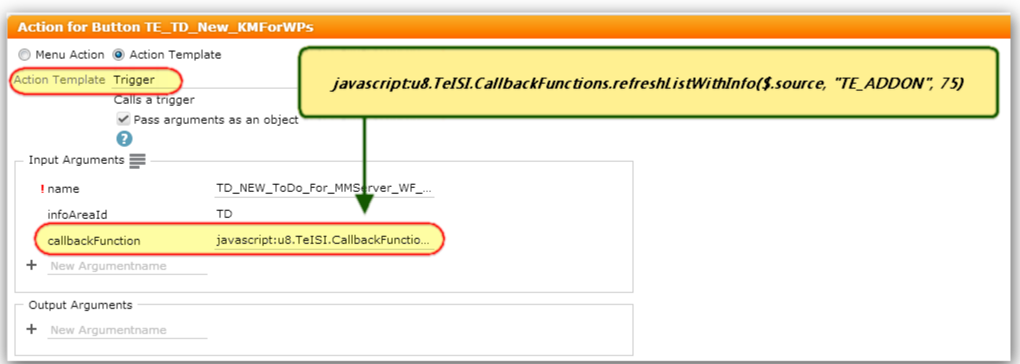
refreshListWithInfo

Parameter: source, textGroupName, messageTextNo, commentTextNo

Call: u8.TeISI.CallbackFunctions.refreshListWithInfo($.source, "textGroupName", messageTextNo, commentTextNo)

Info: Grey parameters are optional!

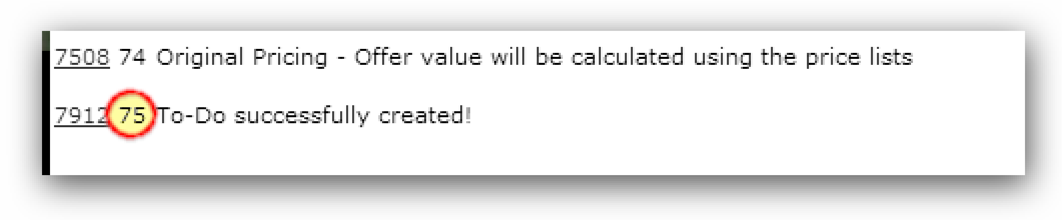
Example:



After executing the trigger, the list will be refreshed and the text will be displayed. Text which is displayed:

textgroup “TE_ADDON”

textNo 75



Light User

Learn about the light user for the ISI Business solution template.

The template comes with a light user role: "TE_Light_User".

And the fitting role-right: "TE_RR LightUser".

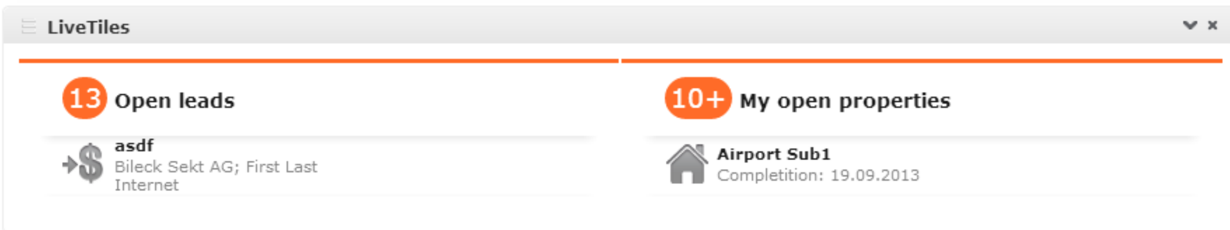
The light user can read everything, but his write rights are restricted to companies, persons and appointments.

Note: If the CRM process configuration is edited you need to update the process configuration with the bulkloader.

LiveTiles

Learn about the LiveTiles that are configured on the property sales dashboard (Form: 'TE_Startpage_Sales_Properties') for demonstration purposes.

The orange circle which counts the results of the used query is implemented through a placeholder {amount} in the displayText property of the LiveTile. The sliding records are formatted through table captions in the corresponding info areas. If there are 2 LiveTiles used aside each other (e.g. inside a table) it is useful to add a CSS property to the DOM element of the table to align them always at the top (so if the height of both LiveTiles is not the same they will still look equal).



Phone

Learn about the Phone feature for ISI business solution template.

By default the selected profile is "TE_Phone_Profile_Demo" which uses uppDemo.dll. Select "TE_Phone_Profile_Standard" to use the uppTapiExt.dll.

Software that must be installed on every client:

- Tapi phone client of your telephone system
- CRM.phone

Queries and Analyses

Queries and analyses enable the user to easily review current information in the Aurea CRM database.

These standard queries and analyses shall cover the most important questions occurring through the use of the provided standard processes. The user shall be able to immediately react to certain status in the different processes, based on the information gathered from and within these queries and analyses.

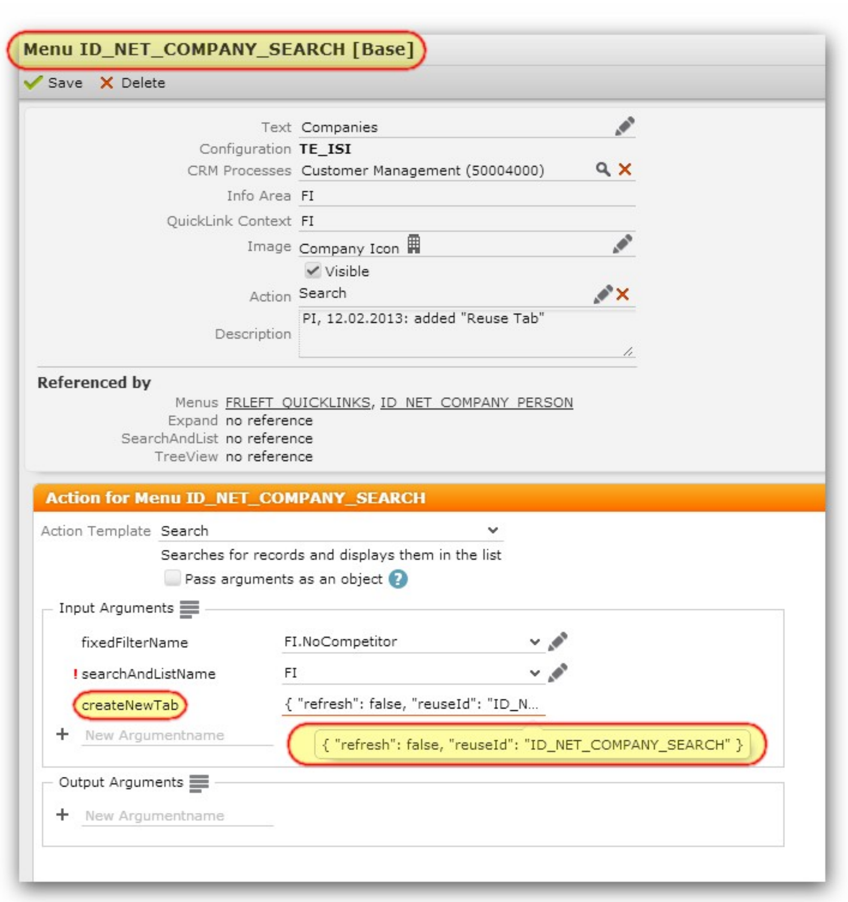
Non-Target

It is not the goal to provide a CRM analytics tool – the analysis shall only aggregate ad-hoc information to provide information for immediate response.

ReUse Tab

The ReUse Tab functionality has been added to all application menu actions.

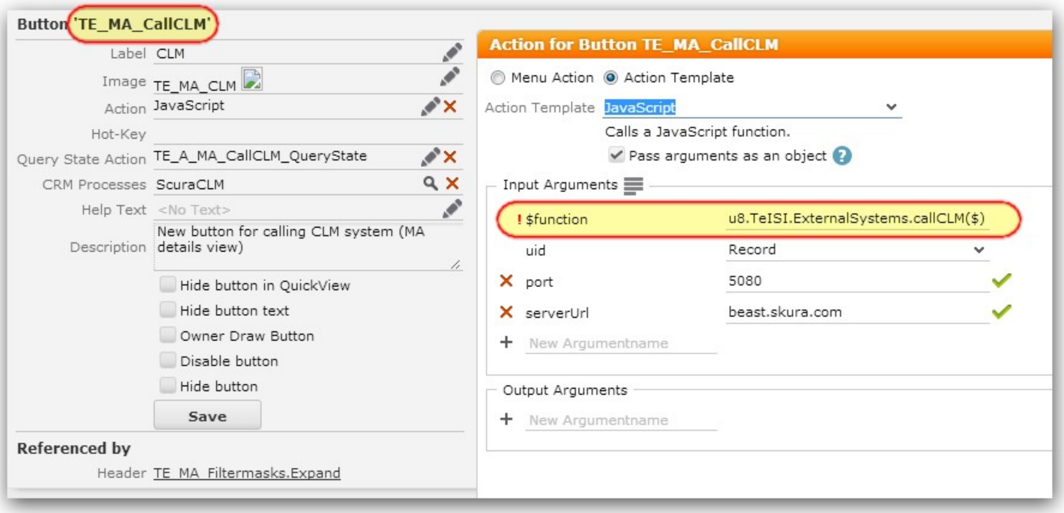
If a tab with the same ID is still open, the tab will be reused, but not refreshed. The ID of the tab is always the name of the menu action. The following syntax has been added:



Scura CLM

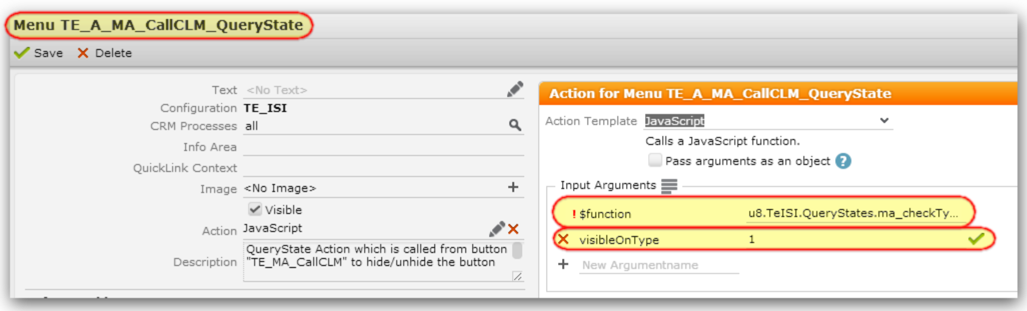
Learn about the Scura CLM for ISI business solution template.

A new “TE_MA_CallCLM” button has been created and has been added to the MA expand masks.



A new JavaScript file “isiexternalsystems.js” has been created.

To hide/unhide this button a query state action has been created. The "visibleOn-Type" parameter defines on which type of MA record the button should be displayed (comma separated list of fixedCatCodeValues, e.g. 1 for “Visit”).



Template Station Right (Free Fields)

Learn how to use free fields in ISI business solution template.

All free fields of every info area are locked in the “TE_SR Central” station right of the ISI template. If you want to use these fields in your project you have to unlock the fields you need in your extension right.

UX Goodies

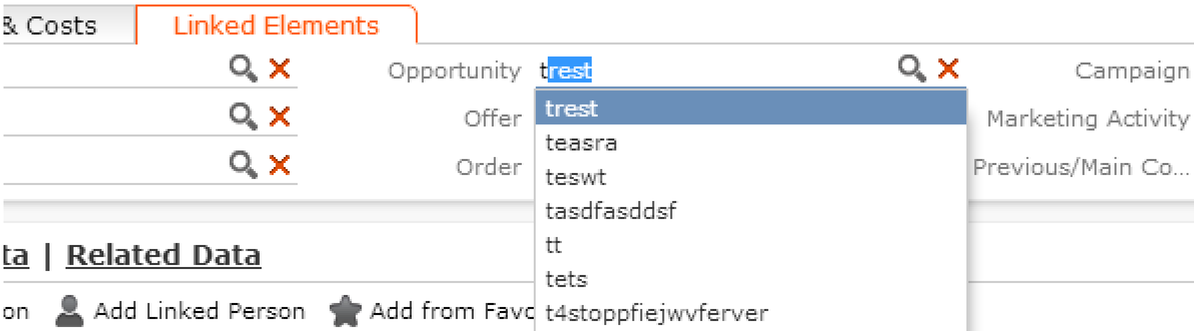
Learn about the user experience goodies.

Field Help

The field help can only be edited. Adding new records must be done in the WIN module or the TranslationTool. Used items:

Unit type	Name	Sub-unit name
MenuItem	CORE_ID_NET_FIELDHELP_SEARCH	
FieldGroup	FH	
FieldControl	FH	Details
FieldControl	FH	List
FieldControl	FH	MiniDetails
FieldControl	FH	Search
HeaderGroup	FH	
Header	FH	ExpandChildren
Header	FH	ExpandOptions
Header	FH	SearchResults
Header	FH	SearchSubList
TableCaption	FH	
Expand	FH	
SearchAndList	FH	
HeaderGroup	CORE_04_FH	
Header	CORE_04_FH	SubList
TextGroup	CORE_common_text	

Linked Fields



The find-as-you-type feature for linked fields has been configured for the following fields: On the details masks:

'MA','TE_MA_Email','TE_MA_Fax','TE_MA_Info','TE_MA_Internet','TE_MA_Letter','TE_MA_QuickView', 'TE_MA_Telephone', 'TE_MA_Telephone_Completed', 'TE_MA_Visit' and 'TE_MA_Visit_Completed'.

For the following fields:

Template (6005), Constr. Project (68), Opportunity (135), Installed Base (146), Offer (144), Activity (143) and Ticket (147). On the 'A1' details mask for the Template (6000) field.

On the 'AU' details mask for the Opportunity (5005) and Ticket (5002) fields. The following select function has been configured for these fields.

```
selectRecord({
  from:
  {
    infoAreaId: "Y1",
    useAutoSearch: true
  },
  findAsYouType:
  {
    searchFields:[6],
    textFields:[6]
  }
});
```

InfoAreaId: the ID of the info area where you want to search, e.g. "Opportunity". searchFields: which fields you want to search.

textFields: the fields you want to show in the drop-down box on the mask (the suggestions).

Telephone Fields

A new functionality has been implemented which pre-fills the country and area code in the phone field.

This function is implemented for the following fields:

- Person
- “Contact” group
- Telephone
- Mobil
- Home office
- Fax
- Company
- “Overview” group
- Telephone
- Fax
- Additional Addresses
- Telephone
- Fax

Example: [country code] ([area code]) e.g. +43 (676)

Changes in the data model

The fax and phone field from the template are obsolete and have been changed to the fields coming from the product. See changes below:

- **Company (FI)**

  Obsolete fields:

212	6000	-x-Telefon	text(50)			F6000	✔	50
213	6001	-x-Fax	text(50)			F6001	✔	50

  Substituted with these field IDs from the product:

Firma

	Typ	Infobereich Vwl.	Vwl.L.	Vwl.O.	Infobereich Tel.	Telefon	Durchwahl	Suche
0	Telefon	Firma (FI)	Landesvorwahl fi	Ortsvorwahl der	Firma (FI)	Telefon		✔
1	Fax	Firma (FI)	Landesvorwahl fi	Ortsvorwahl der	Firma (FI)	Fax		
2	Modem	Firma (FI)	Landesvorwahl fi	Ortsvorwahl der	Firma (FI)	Modem		
3	Telefon				Firma (FI)	Telefon		

  Phone column: Obsolete configuration.

  New configuration.

Firma

	Typ	Infobereich Vwl.	Vwl.L.	Vwl.O.	Infobereich Tel.	Telefon	Durchwahl	Suche
0	Telefon	Firma (FI)	Vwl.L.	Vwl.O.	Firma (FI)	Telefon		✔
1	Fax	Firma (FI)	Vwl.L.	Vwl.O.	Firma (FI)	Fax		
2	Modem	Firma (FI)	Vwl.L.	Vwl.O.	Firma (FI)	Modem		

- **Person (KP)**

  Obsolete fields:

161	6001	-x-Telefon	text(50)			F6001	✔	50
162	6002	-x-Fax	text(50)			F6002	✔	50

  Substituted with these field IDs from the product:

6	6	Telefon	text(40)			Telefon1	✔	40
8	8	Fax	text(40)			Fax	✔	40

  Phone column: Obsolete configuration.

Person

	Typ	Infobereich Vwl.	Vwl.L.	Vwl.O.	Infobereich Tel.	Telefon	Durchwahl	Suche
0	Telefon	Firma (FI)	Landesvorwahl fi	Ortsvorwahl der	Person (KP)	Telefon		✔
1	Telefon	Firma (FI)	Landesvorwahl fi	Ortsvorwahl der	Person (KP)	Telefon 2		✔
2	Fax	Firma (FI)	Landesvorwahl fi	Ortsvorwahl der	Person (KP)	Fax		
3	Telefon	Person (KP)	Länderschlüssel	Ortsvorwahl	Person (KP)	Tel.privat		✔
4	Fax	Person (KP)	Länderschlüssel	Ortsvorwahl	Person (KP)	Fax privat		
5	Mobiltelefon	Firma (FI)	Landesvorwahl fi		Person (KP)	Mobil		✔
6	Telefon	Firma (FI)	Landesvorwahl fi	Ortsvorwahl der	Firma (FI)	Telefon	-x-Tel.Ext	✔
7	Fax	Firma (FI)	Landesvorwahl fi	Ortsvorwahl der	Firma (FI)	Fax	-x-Fax.Ext	
8	Telefon				Person (KP)	Telefon		✔
9	Fax				Person (KP)	Fax		
10	Mobiltelefon				Person (KP)	Mobil		✔
11	Telefon				Person (KP)	Homeoffice		

  New configuration.

Person

	Typ	Infobereich Vwl.	Vwl.L.	Vwl.O.	Infobereich Tel.	Telefon	Durchwahl	Suche
0	Telefon	Firma (FI)	Vwl.L.	Vwl.O.	Person (KP)	Telefon		✔
1	Telefon	Firma (FI)	Vwl.L.	Vwl.O.	Person (KP)	Telefon 2		✔
2	Fax	Firma (FI)	Vwl.L.	Vwl.O.	Person (KP)	Fax		
3	Telefon	Person (KP)	Länderschlüssel	Ortsvorwahl	Person (KP)	Tel.privat		✔
4	Fax	Person (KP)	Länderschlüssel	Ortsvorwahl	Person (KP)	Fax privat		
5	Mobiltelefon	Firma (FI)	Vwl.L.		Person (KP)	Mobil		✔
6	Telefon	Firma (FI)	Vwl.L.	Vwl.O.	Firma (FI)	Telefon	-x-Tel.Ext	✔
7	Fax	Firma (FI)	Vwl.L.	Vwl.O.	Firma (FI)	Fax	-x-Fax.Ext	
8	Mobiltelefon				Person (KP)	Mobil		✔
9	Telefon	Firma (FI)	Vwl.L.	Vwl.O.	Person (KP)	Homeoffice		✔

- **Additional Addresses (ZA)**

  Obsolete fields:

81	6000	-x-Telefon	text(50)			F6000	✔	50
82	6001	-x-Fax	text(50)			F6001	✔	50

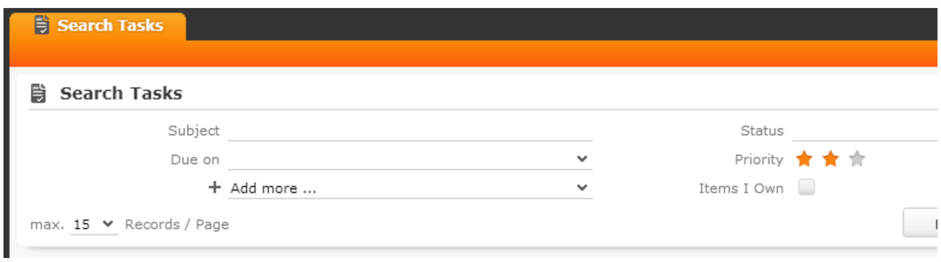
  Substituted with these field IDs from the product:

16	16	Telefon	text(40)			Tel	✔	40
17	17	Fax	text(40)			Fax	✔	40

Rating Input

The MA (Activity), A031 (Activity Template), A1 (Task), A029 (Task Template), and KM (Ticket) info areas have been customized to use a rating input widget in all available areas.

Used in Search:



Used in Details:

The following widget code (with variable InfoAreaId related to the used priority catalog) was used on every rating control:

{

type: "CatalogRatingInput", options:

{

infoAreaId: "KM", fieldId: "Priority", style: "stars", allowNull: true, ratingInput:

{

showValue: false

}

}

}

The “allowNull” option should be only used in search masks to give the user the opportunity to disable the search for records with a specific priority.

Virtual Info Areas

We have defined 4 virtual info areas in the ISI template:

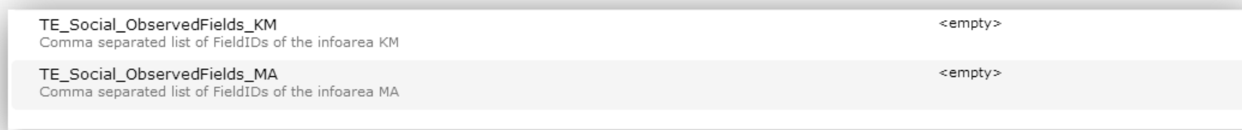
Virtual info area	Base info area	Name
TFI1	FI	Competitor
TPR1	PR	Service Contract Offer
TPR2	PR	Service Offer
TPR3	PR	Service Report

The virtual info areas are defined in the “settings.xml” file so please check out this file to get more information:

```
<VirtualSchema>
    <!-- ISI-TEMPLATE Virtual Infoareas must start with "T..." ! -->
    <!-- Company Competitor FI -->
    <InfoArea infoAreaId='TFI1' physicalInfoAreaId='FI' name='Competitor' fieldId='5031'    fieldType='K' value='Competitor (BASE)' tenantNo='9000'/>

    <!-- Offer Types PR -->
    <InfoArea infoAreaId='TPR1' physicalInfoAreaId='PR' name='Service Contract Offer'   fieldId='5029' fieldType='K' value='Service Contract Offer (BASE)' tenantNo='9000'/>
    <InfoArea infoAreaId='TPR2' physicalInfoAreaId='PR' name='Service Offer'            fieldId='5029' fieldType='K' value='Service Offer (BASE)' tenantNo='9000'/>
    <InfoArea infoAreaId='TPR3' physicalInfoAreaId='PR' name='Service Report'           fieldId='5029' fieldType='K' value='Service Report (BASE)' tenantNo='9000'/>

    <!-- CUSTOMER Virtual Infoareas must start with "V..." as described in the infoletter -->
    <!-- DEFINE your customer virtual infoareas here: e.g.: <InfoArea infoAreaId='V...' physicalInfoAreaId='' name='' fieldId='' fieldType='' value='' tenantNo=''/> -->
</VirtualSchema>
```

Social Listener

Version 5 of the template has two new web config parameters where the listened fields can be defined.



Until now, the fields were hardcoded in the script “isisocial.js”

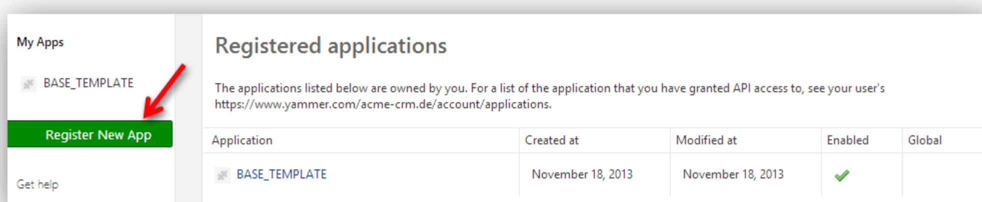
Example: The value of the parameter “TE_Social_ObservedFields_MA” may look like this: 5044,23

Yammer

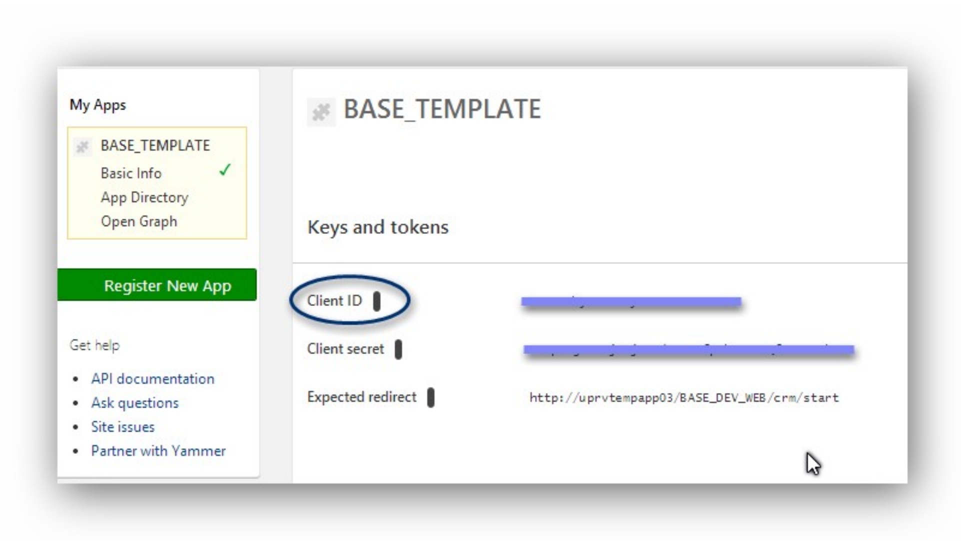
Learn about using yammer in business solution template.

To get your own yammer ID you have to register your application in yammer.

- Log on to yammer with your (admin) user. Use this link: https://www.yammer.com/client_applications
- Click on “Register New App”. Complete the registration process.



After registering your application you can see your “Client ID” which you have to enter in the html file.

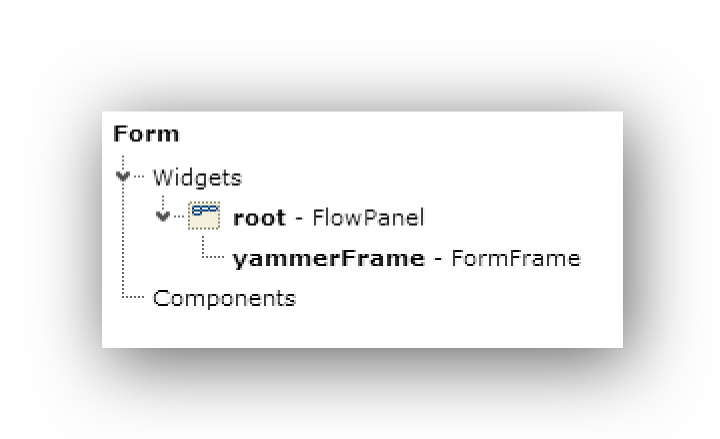


Aurea CRM designer

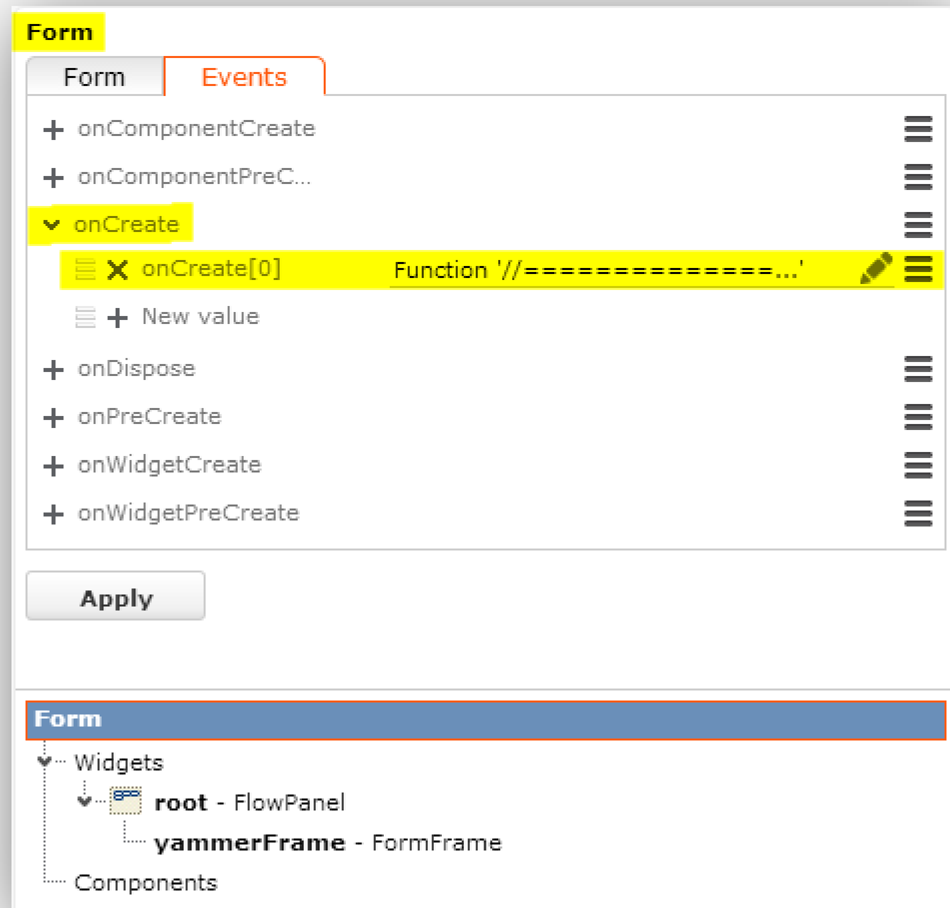
As part of the ISI Template we deliver an example form in the TE_CORE configuration.

Form name: “CORE_Yammer_Example_FI”

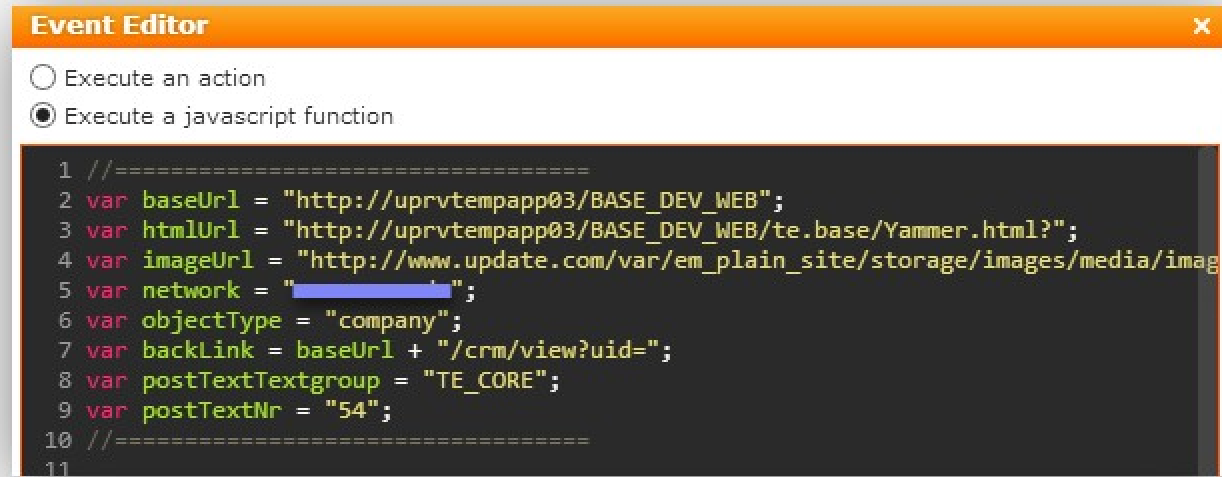
This form contains a FormFrame, which allows the display of the Yammer content.



We added an OnCreate javascript function for the form:



You have to modify the function to use your project-specific data:
Enter all parameters at the top of the script

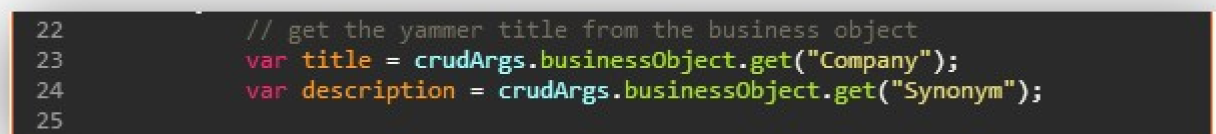


Parameter Name	Description	Example
baseUrl	URL of your web installation	http://uprvtempapp03/BASE_DEV_WEB/te.base/Yammer.html?
htmlUrl	URL of the yammer html file	http://uprvtempapp03/BASE_DEV_WEB
imageUrl	URL of an image (eg. company icon for FI info area)	http://www.update.com/var/em_plain_site/storage/images/media/images/logos/update/isi_icon_b utton/120519-1-eng-US/ISI_icon_button_65px.png
network	Yammer network name	-
objectType	Type of yammer feed	company
backlink	Link of the record in your CRM system to navigate from yammer back to your CRM system	http://uprvtempapp03/BASE_DEV_WEB/crm/view?uid=

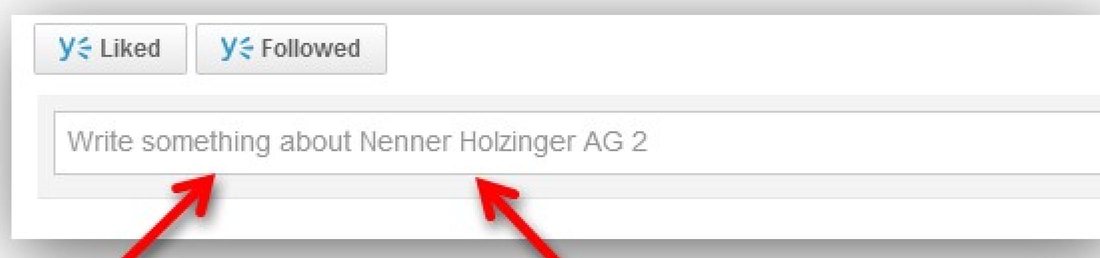
Parameter Name	Description	Example
postText-Textgroup	Name of the text group in your designer configuration where the string you want to display is located	TE_CORE
postTextNr	Number of the text in the text group	54

Enter all fields of the info area, which you want to pass to yammer as title or description:

Modify the “title” and “description” strings so that they fit your customer’s needs:



UI text:



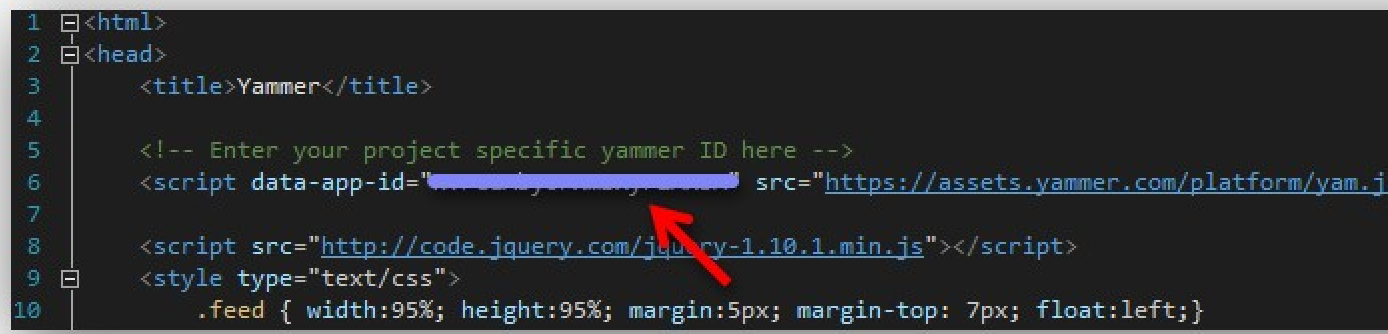
We are using two strings to display this text:

“Write something about” = postText (in our case TextNr. 54 in TE_CORE text group)

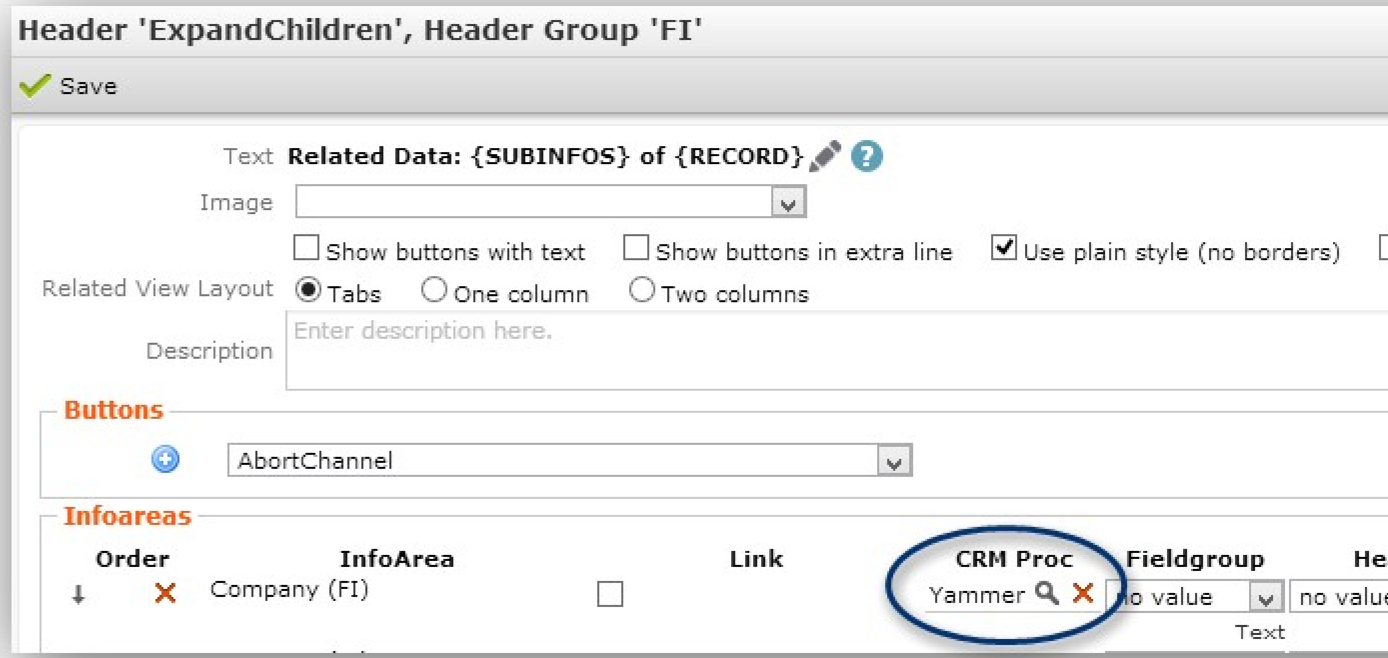
“Nenner Holzinger AG 2” = title

We are also delivering an example html file, which you can use as a template, so please copy the “Yammer_Expample.html” file which is located in the “\web\te.base” folder and rename the copy to “Yammer.html”.

You have to enter your project-specific yammer ID in this file:



To display the form in your web application just add the form as a related data tab:



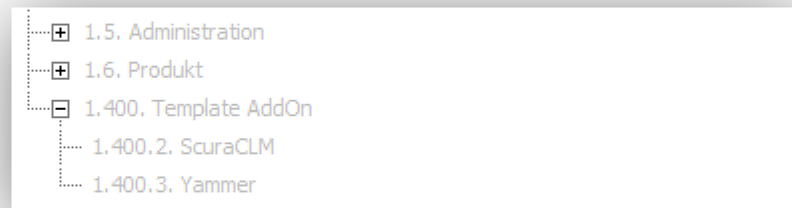
Parameters:

CRM Process: “Yammer”

Text: “Yammer” (text group: TE_CORE)

Form name: Your form name

The “Yammer” CRM process (1.400.3) is a node beneath the “Template AddOn” node in the process config tree:



This process is deactivated by default so you have to activate it in your process configurations if you want to use it.

Sofon

Learn how to install and configure sofon and integrate it with aurea win and web.

Aurea CRM win

Datamodel

We added 2 fields for the sofon integration:

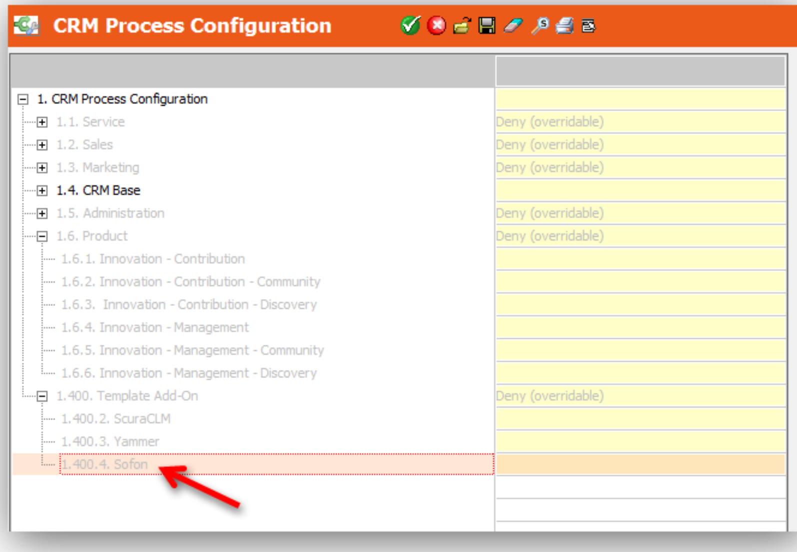
Infoarea PR: field 5048   here the sofon id is stored

Infoarea AP: field 5028   describes if the offer item represents a sofon item These fields are automatically set in the background.

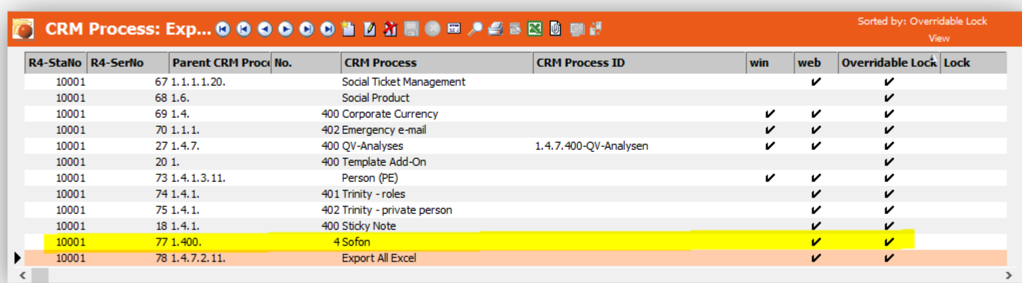
Rights

We have locked the following fields (infoarea PR) if the sofonID is set, beacause it should not be possible to set a sofon offer as template.

CRM process



A new crm process has been created and is delivered deactivated. All designer elements are linked to this process. If you want to used sofon in your project, you have to activate this crm process.

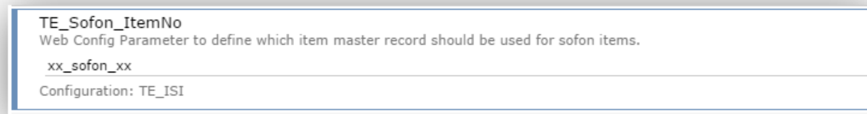


Aurea CRM web

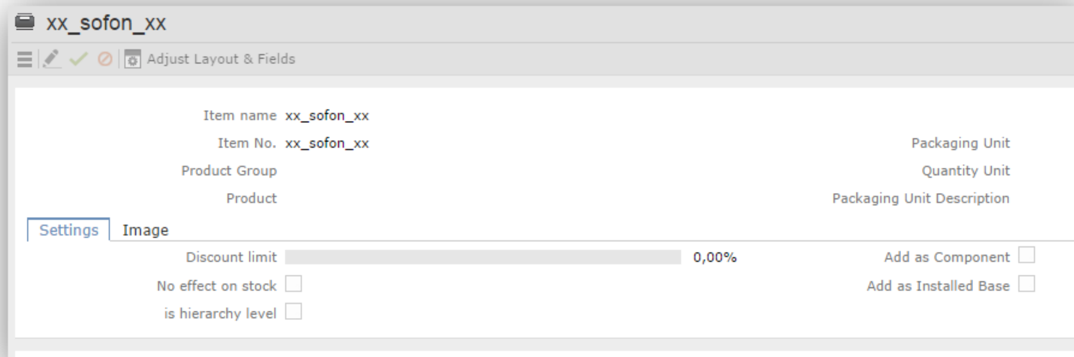
WebConfiguration Parameter

There are 4 web configuration parameters which have to be set in the projects to run sofon.

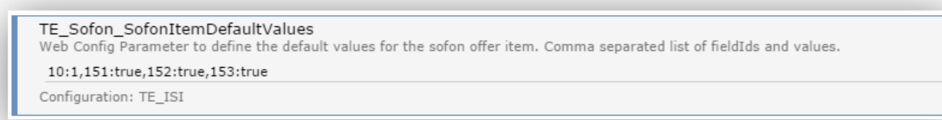
The first parameter defines which item master is used to create the offer item position of the sofon offer



Please make sure that the item master records exsists in your crm

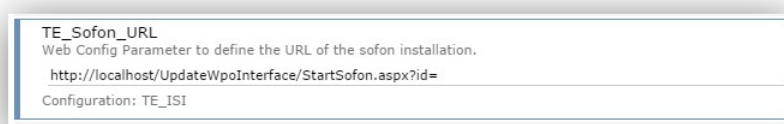


The second parameter defines the default values of the offer item record

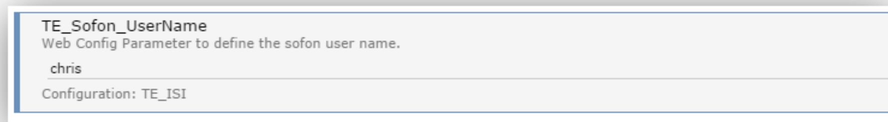


The parameter contains a comma separated list of fieldIDs and values <field-ID>:<fieldValue>,...

The third parameter defines the url to your sofon installation



The fourth parameter defines the user name of your sofon installation



Textgroup

We're using a special textgroup for all texts used for sofon called "TE_PR_Sofon".

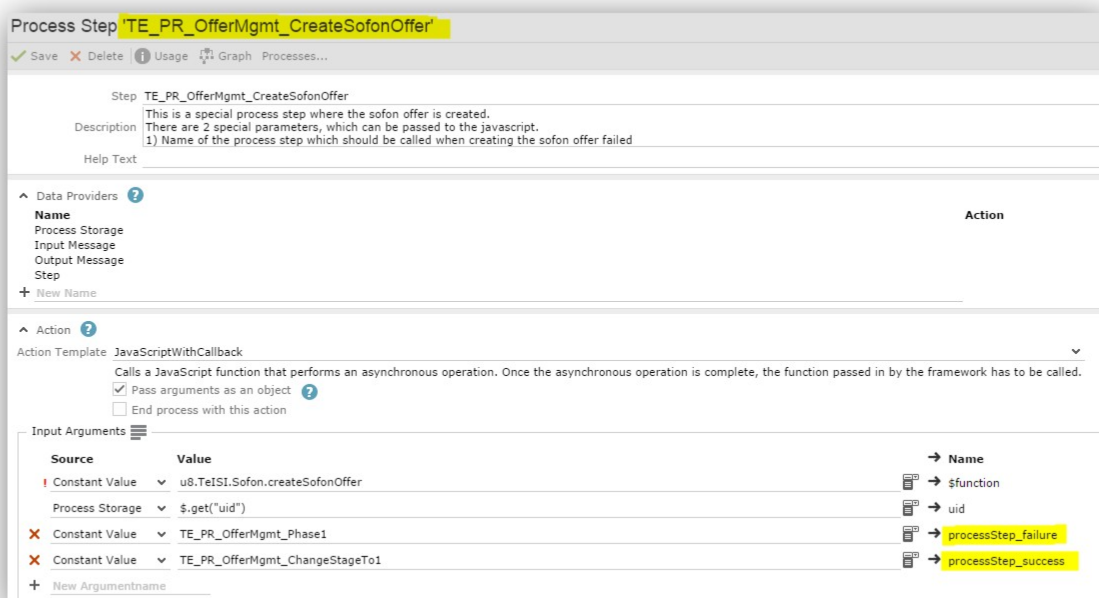
Queries

We created 2 new queries which are used in the javascript. Please make sure that these queries exist in your designer database (TE_PR_Sofon_CheckAP, TE_PR_Sofon_CheckAR).

Offer Process

The offer process has been modified to fit the requirements. A new process step has been added. This step call a javascript function which calls the sofon channel. The channel is used to call the serverside code. This code creates an offer in sofon and returns the sofonID.

There are 2 additional parameters which define the next steps. You can define which steps are called, if the creation of the offer in sofon failed or was successful.

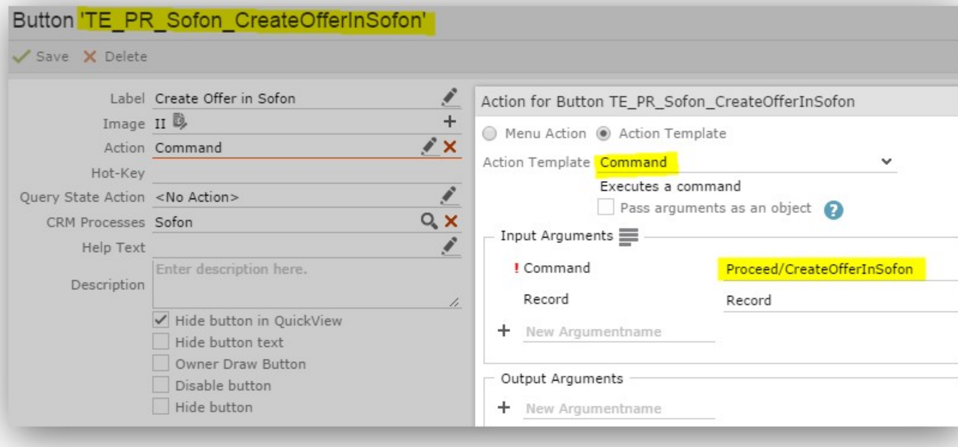


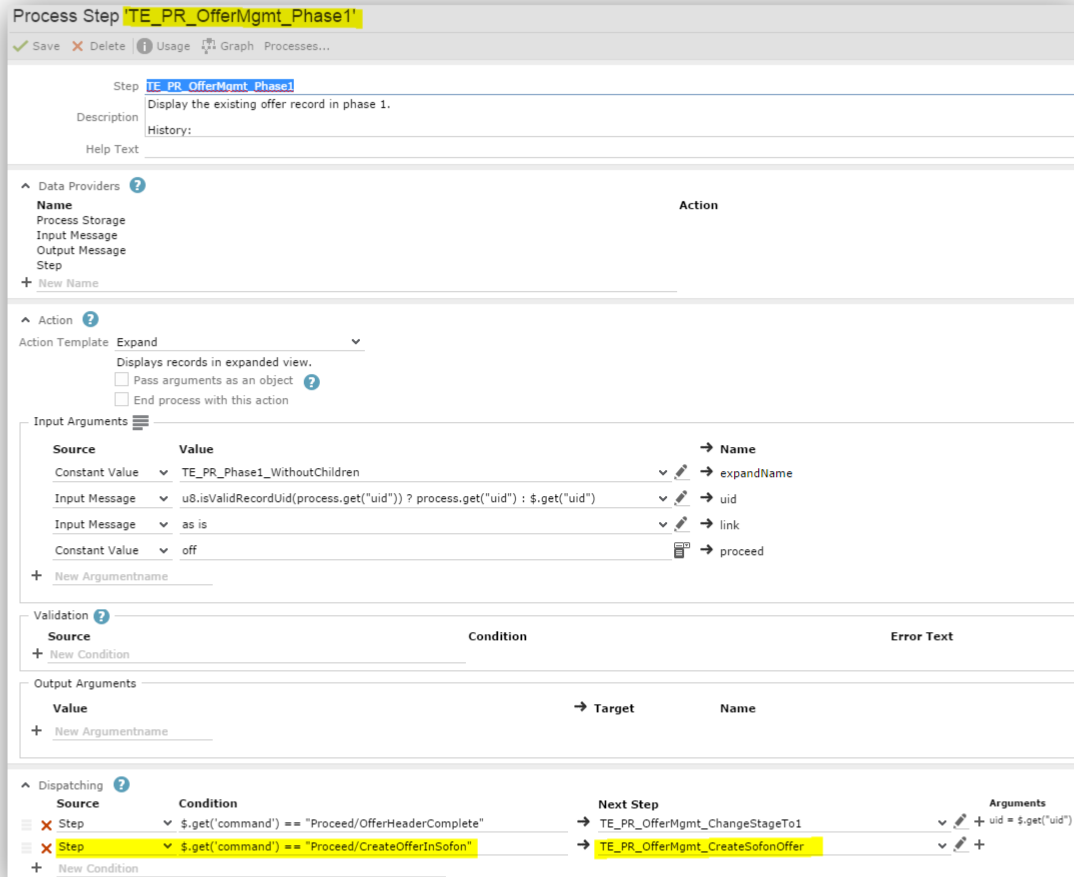
Buttons

A few new buttons have been created.

TE_PR_Sofon_CreateOfferInSofon

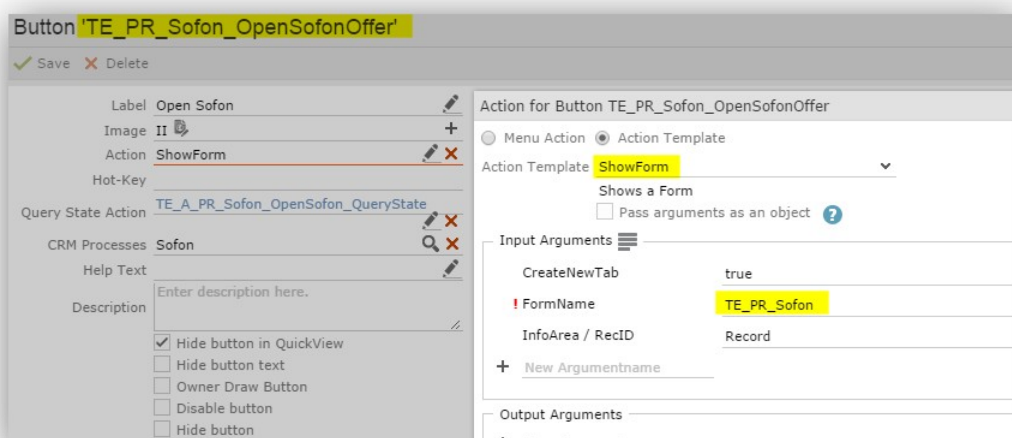
This button fires a command, which is handeled in the offer process to create a new offer in sofon



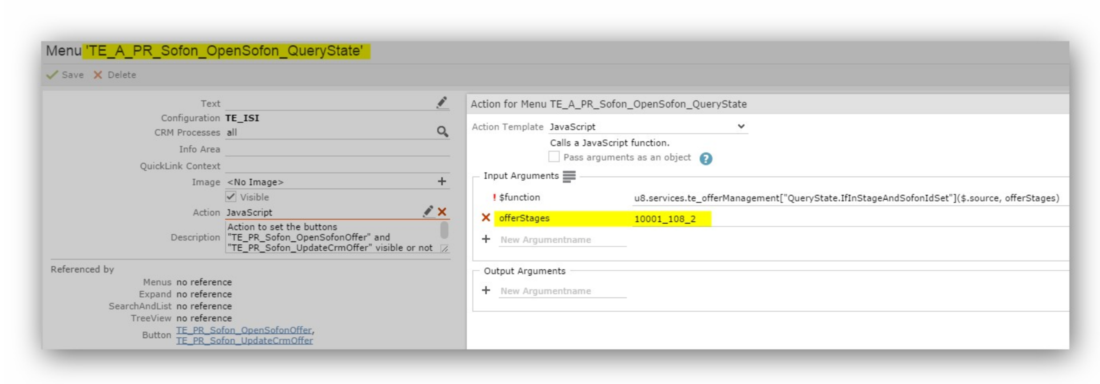


TE_PR_Sofon_OpenSofonOffer

This button opens the sofon form in a new tab

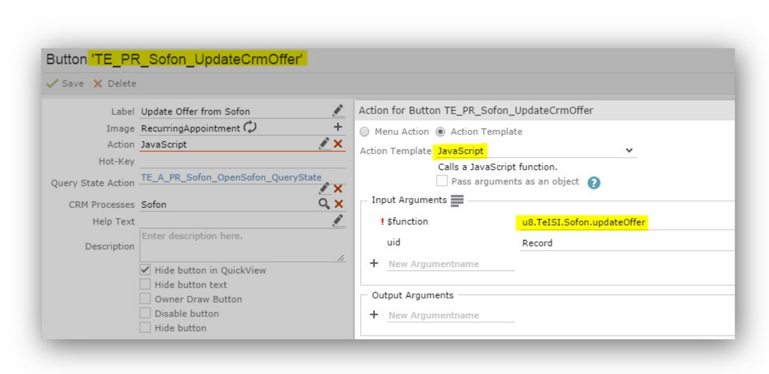


Furthermore a querystate action is linked to the button. Using this querystate you can define, when the button is visible or not, dependent on the offer stage:



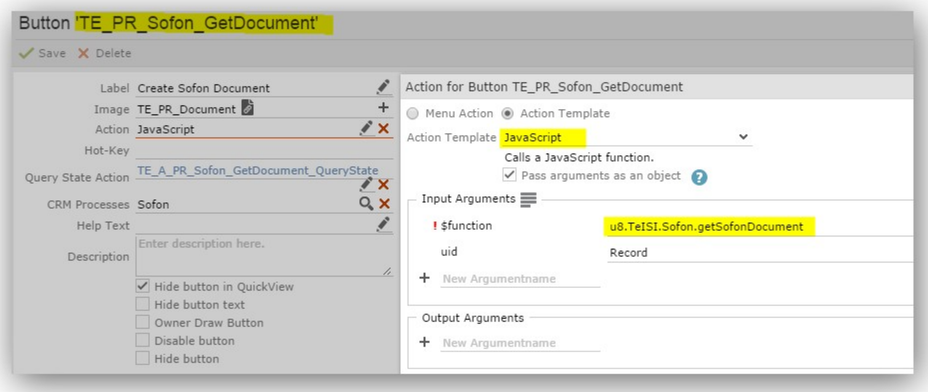
TE_PR_Sofon_UpdateCrmOffer

This button calls a javascript function which calls a channel. This channel calls the serverside code to update the offer in your crm with data from sofon. Which fields should be updated, can be defined in the settings.xml



TE_PR_Sofon_GetDocument

This button calls a javascript function which calls a channel. This channel calls the serverside code to get the document from sofon. After getting the document, a D1 and a D3 records is created in the crm. The D3 record gets linked to the offer.



Form

The form itself contains 3 elements:

- Model to save the offer record
- FlowPanel
- FormFrame to render the sofon application

The model is used to store the offer uid in the form. When using javascript code we can access this variable and get the right offer record:

As you can see on the second screenshot, there are functions which are called when the form is created and when the form is disposed.

The “onCreate” function gets some information out of the form and calls a javascript function which renders the sofon

application in the formframe.

The “onDispose” function does the same as the “TE_PR_Sofon_UpdateCrmOffer” button. When the tab with the form is closed, the crm offer gets updated.

For more information please check out the code comments in the form.

Files

Following files have been added/modified to run the sofon integration:

- Sofon.dll (\web\te.bin)
- Settings.xml (\web\system\settings)
- isisofon.js (\web\scripts\te.isi)

Settings.xml

This file contains some additional parameters for sofon. A new plugin has been added. The whole fieldmapping between update and sofon fields is done in this file. Furthermore you can define the URL of your sofon installation.

Example Code:

<PlugIn type="Sofon.PlugIn,Sofon">

<SofonWebService url="http://localhost/UpdateWpoInterface/integration.asmx"/>

```xml
<InputFieldMappings>
<!-- Fields which are initially sent to Sofon -->
<FieldMapping type="Company">
<Field sofonName="CustomerName"index="2" />
</FieldMapping>
<FieldMapping type="Person">
<Field sofonName="CustomerLastName"index="2"/>
</FieldMapping>
<FieldMapping type="Rep">
<Field sofonName="Salesman"index="3" />
</FieldMapping>
<FieldMapping type="Offer">
<Field sofonName="QuoteDate"index="10" />
<Field sofonName="QuoteNr"index="7000" />
</FieldMapping>
</InputFieldMappings>
<UpdateFieldMappings>
<!-- Fields which should get updated, if the data in the crm has changed (eg. contact
person) -->
<FieldMapping type="Company">
<Field sofonName="CustomerName"index="2" />
</FieldMapping>
<FieldMapping type="Person">
<Field sofonName="CustomerLastName"index="2"/>
</FieldMapping>
<FieldMapping type="Rep">
<Field sofonName="Salesman"index="3" />
</FieldMapping>
<FieldMapping type="Offer">
<Field sofonName="SalesmanCode"index="24" />
</FieldMapping>
</UpdateFieldMappings>
<OutputFieldMappings>
<!-- Fields which get updated from Sofon -->
<FieldMapping type="Offer">
<Field sofonName="Subject"index="72" />
```

```
</FieldMapping>
<FieldMapping type="OfferItem">
<Field sofonName="CostPrice"index="17" />
</FieldMapping>
</OutputFieldMappings>
</PlugIn>
```

You can extend the field mapping in this file, but the infoareas are fixed. Therefore it is possible to change the sofonName and the index.

- index represents the fieldID of the update datamodel
- sofonName represents the sofon xml field name

Other infos

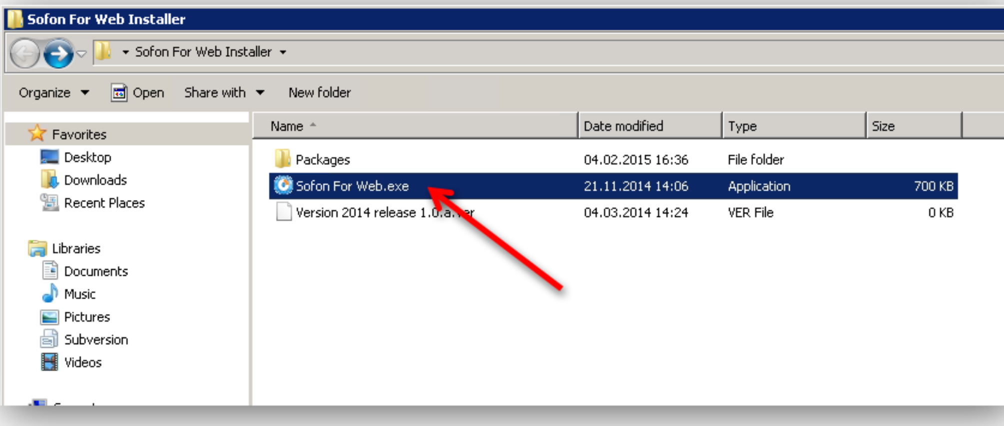
Due to the fact, that we’re not delivering the sofon item, you should make sure,that you set special rights on that item.

Furthermore you should modify your document templates, so that when creating offer documents the sofon item is not passed to the template and therefore not part of the document.

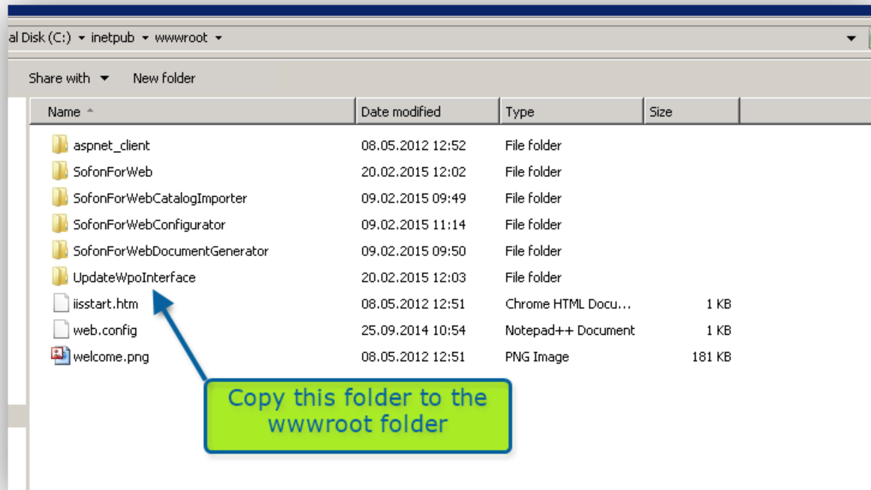
Installation & Configuration

1. To install Sofon please run the Sofon Standard installer.

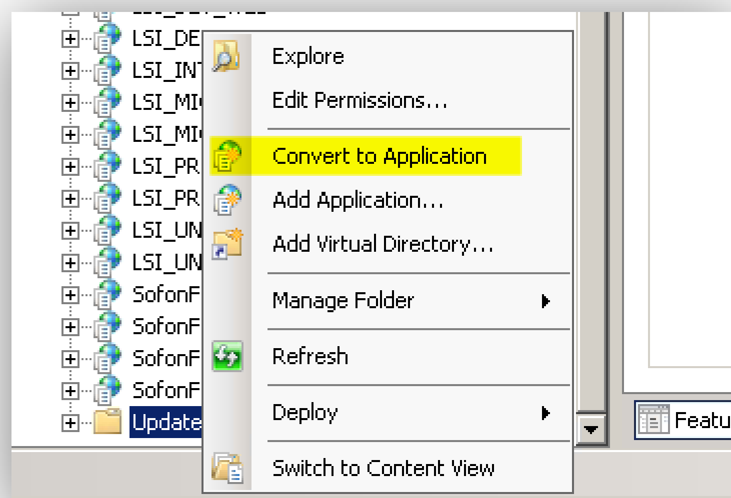
Note: Packages folder must contain msi files.



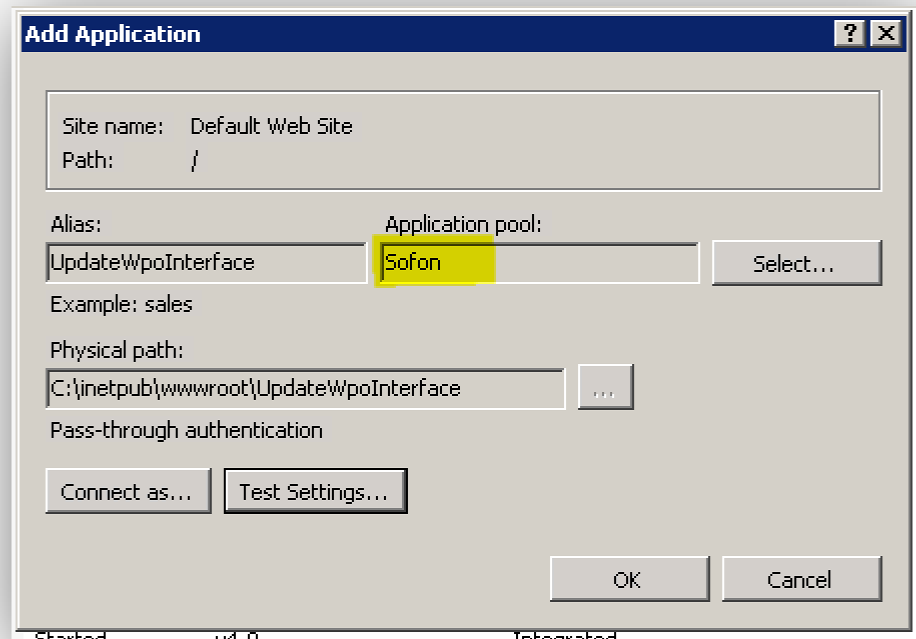
2. After installing Sofon you have to intall the update specific interface.



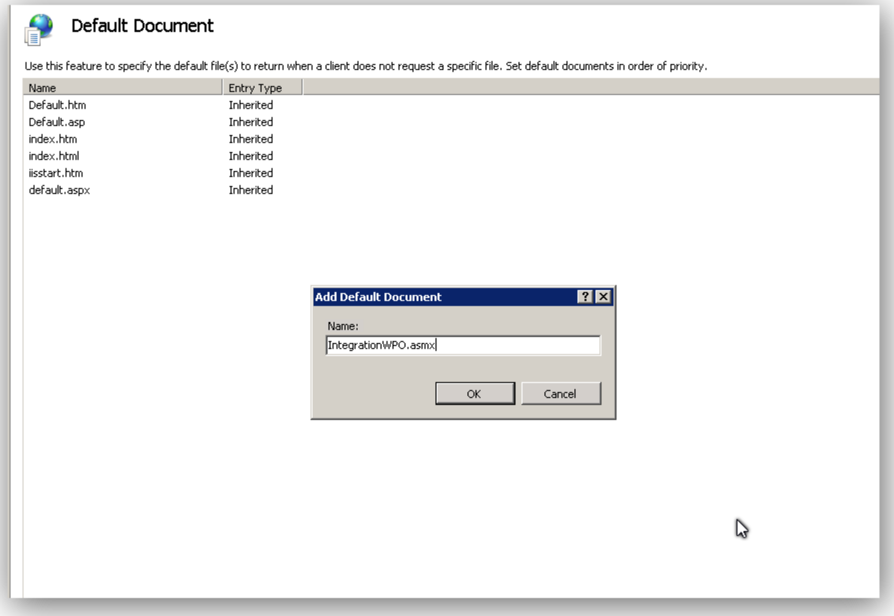
3. When opening the IIS Manager you can see the folder. Convert this folder to an application:



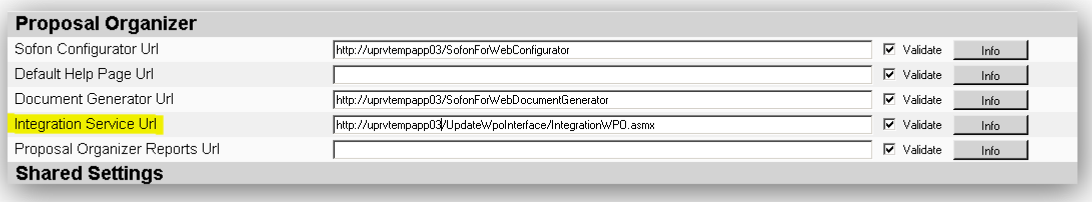
4. Choose the automatically created “Sofon” application pool:



5. Now, add the “IntegrationWPO.asmx” to the IIS Default Documents

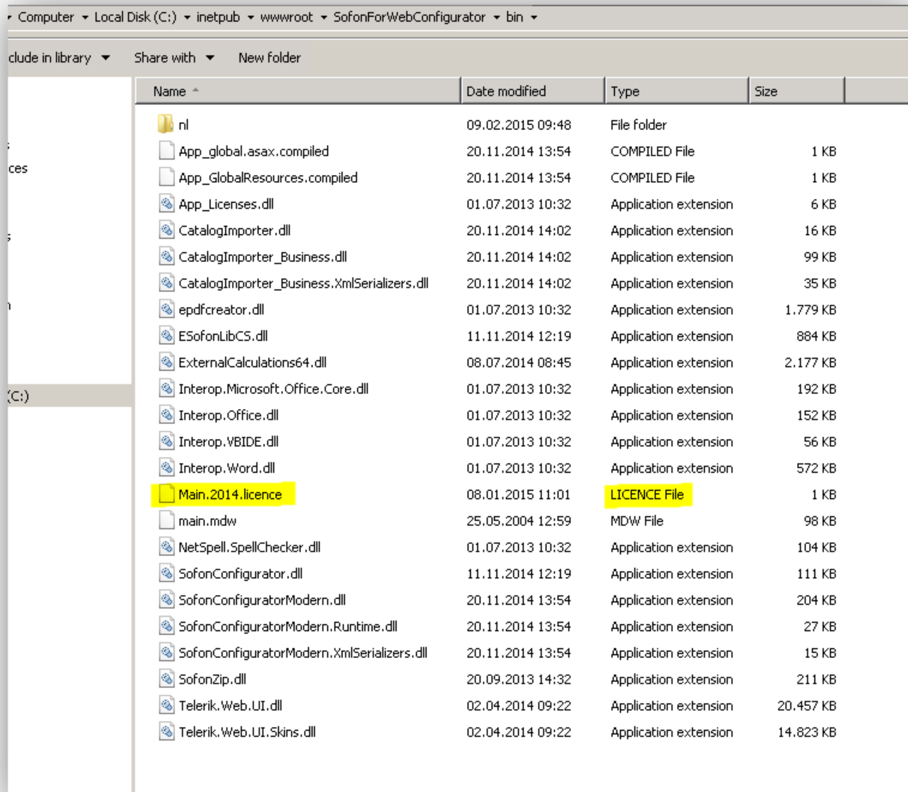


6. Now, open all of these *.exe File to configure your Sofon installation:

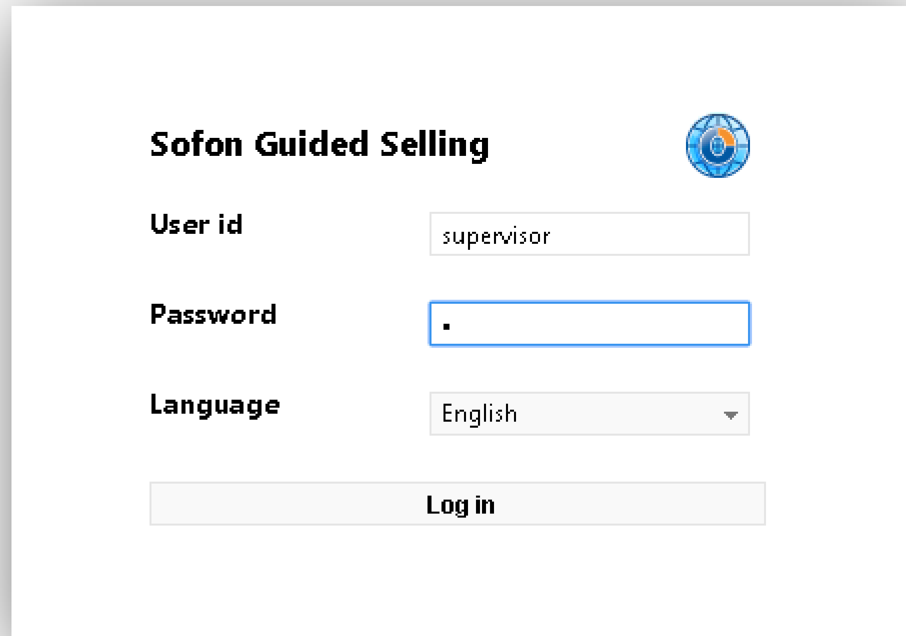


This URL should be set as „Integration Service URL:“ http://servername/UpdateWpoInterface/IntegrationWPO.asmx

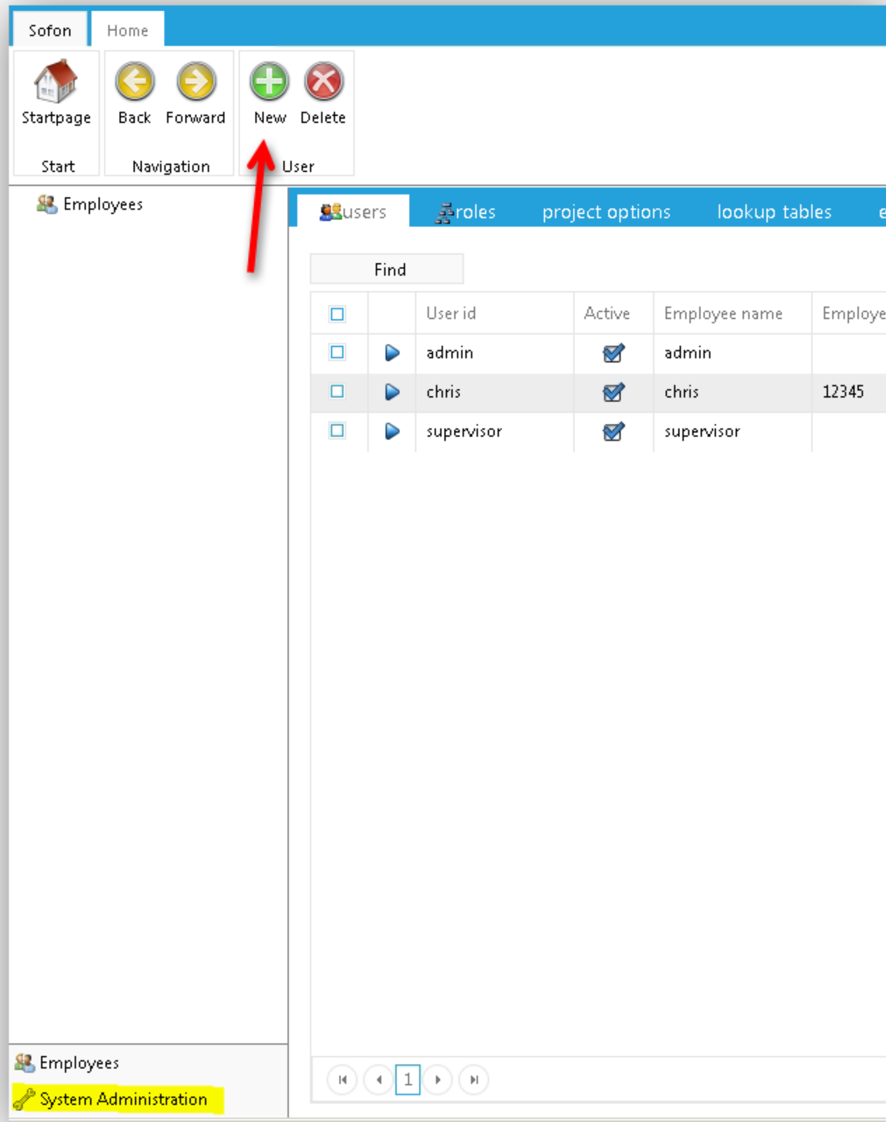
7. After installing the complete Sofon package you should make sure that the product is licensed. Copy you valid license to the following folder:

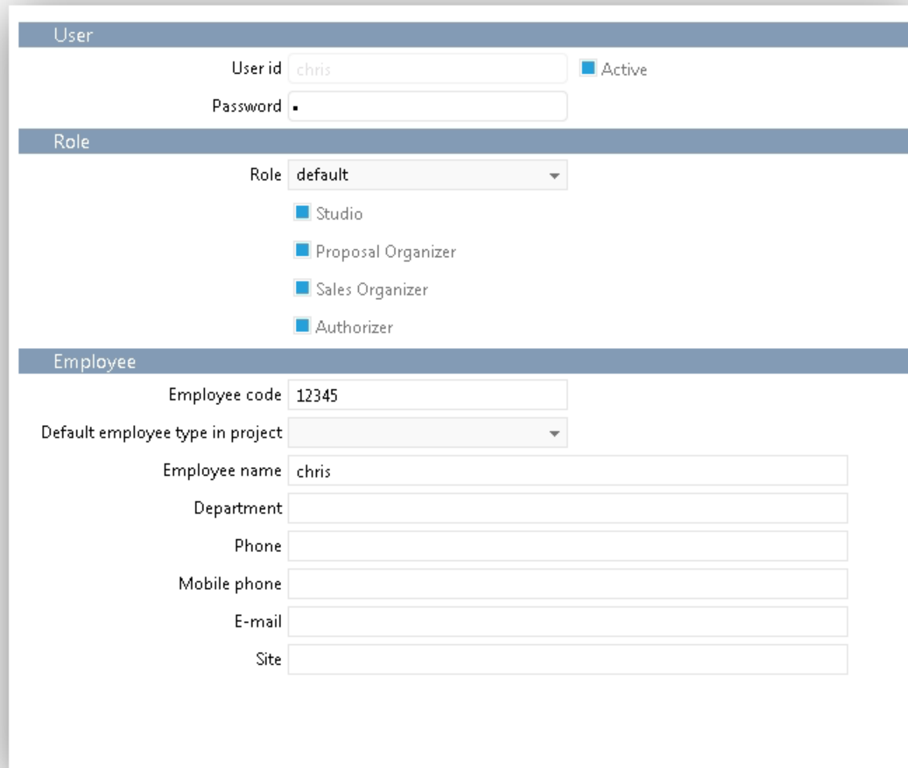


8. If all steps are successful, you should now be able to login as „supervisor“ (password: “s”) Open IIS Manager Go to SofonForWeb Page Click “browse”

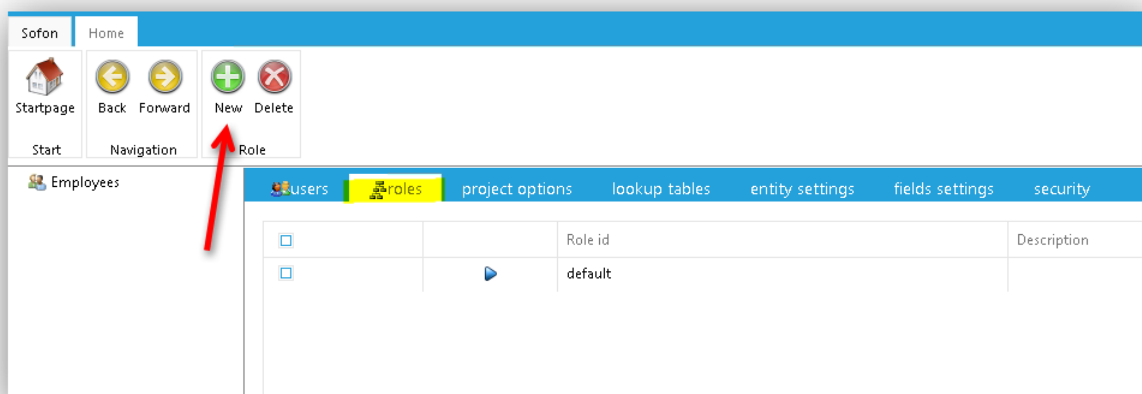


9. Swith to “System Administration” and create a new employee as described below. In our case the user name is “chris”.

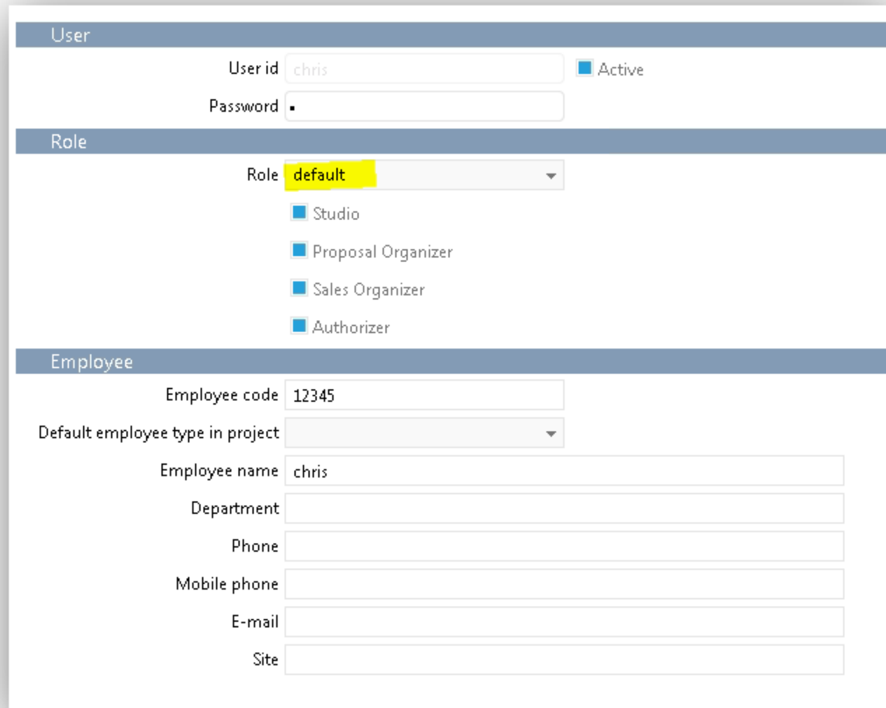




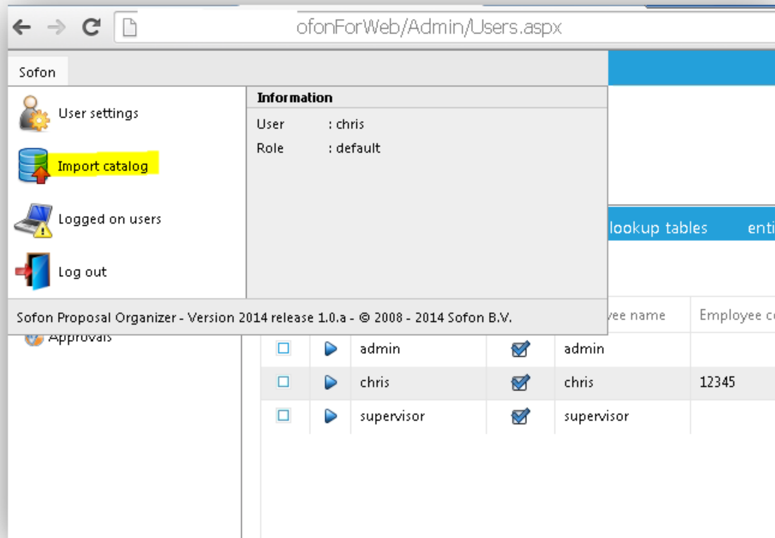
10.Create a new role called “default”



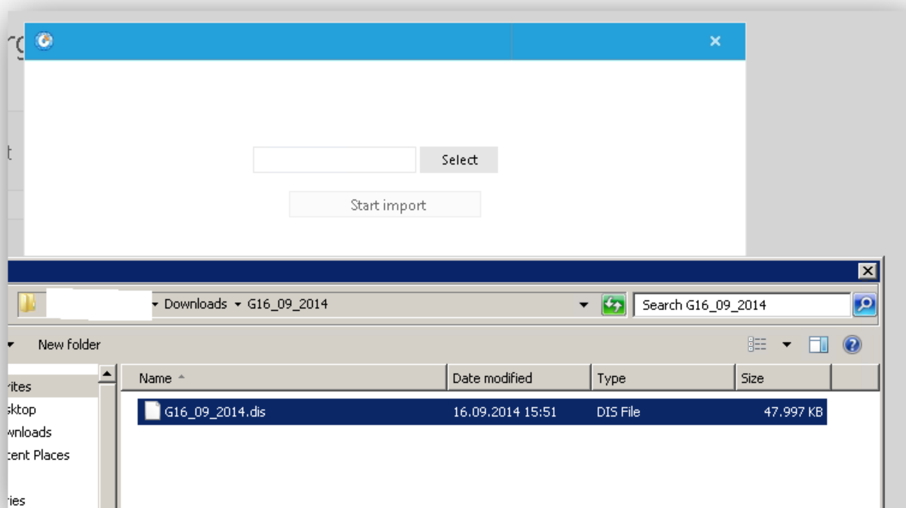
11. Assign the role to the rep:



12.Import your Model.



13.Choose you *.dis file and upload it.



Note: Make sure, that the user has access to he folder “C:\temp\ImportData”. Otherwise the import will fail!

New Tenant Number Fields

List if new tenant number fields for certain info areas.

We added new tenant number fields for the following infoareas:

Y3, BR, F4, F5, AT, AN, TN, AG, U020, U022, U029, U030, U031

Furthermore we also added these infoareas to the template tenant right “TR Tenant”.