



Customer Relationship
Management

ISI Business Solution Template Guide

Version 14.1



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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.
<i>Italic Fixed-width</i>	<i>Italic Fixed-width</i> 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.
<i>Italic serif</i>	In text, <i>italic serif</i> 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 <u>-LOGFILE</u> parameter in a command, you only need to enter <code>-LOGF</code> .
[]	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

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Information about the support organization is available on Support Central. The product documentation is available at <https://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

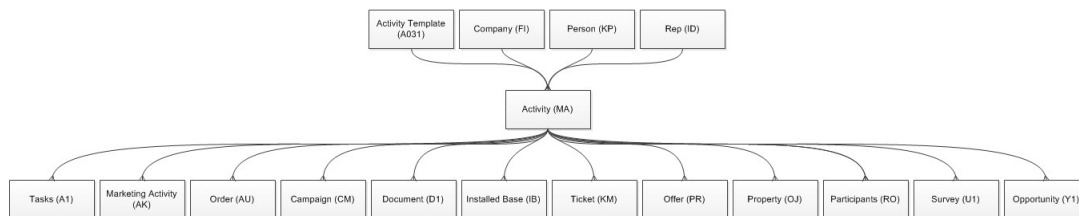
CRM Base

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.

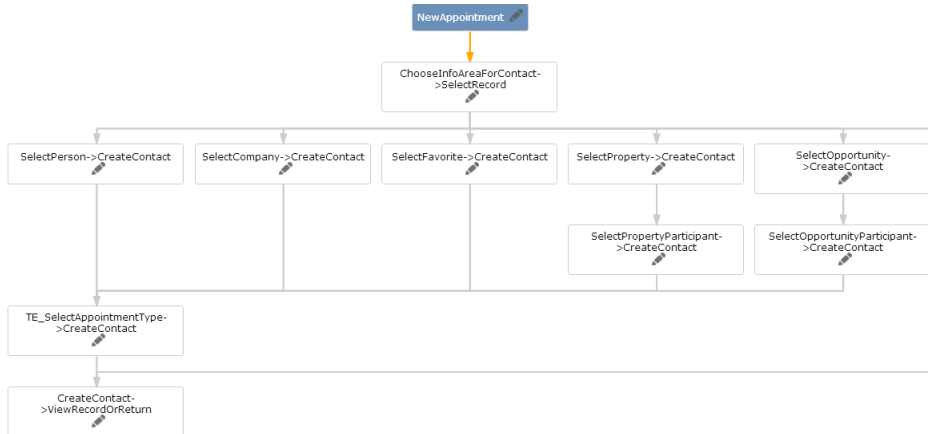
Filtermasks

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.

No.	Activity	Type	Length	Inheritance	Deny Access	Deny New	Deny Update	Deny Deletion	Mand. Field	Do not log updates
0	Typ		255					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
1	Status		255							
2	Starts on		10					<input checked="" type="checkbox"/>	<input type="checkbox"/>	
3	Starts at		11						<input type="checkbox"/>	
4	Calc. Durat.		5							
5	Unit		255							
6	Ends on		11							
7	Calc. Cost		12							
8	Rep		10						<input type="checkbox"/>	

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 Attac	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

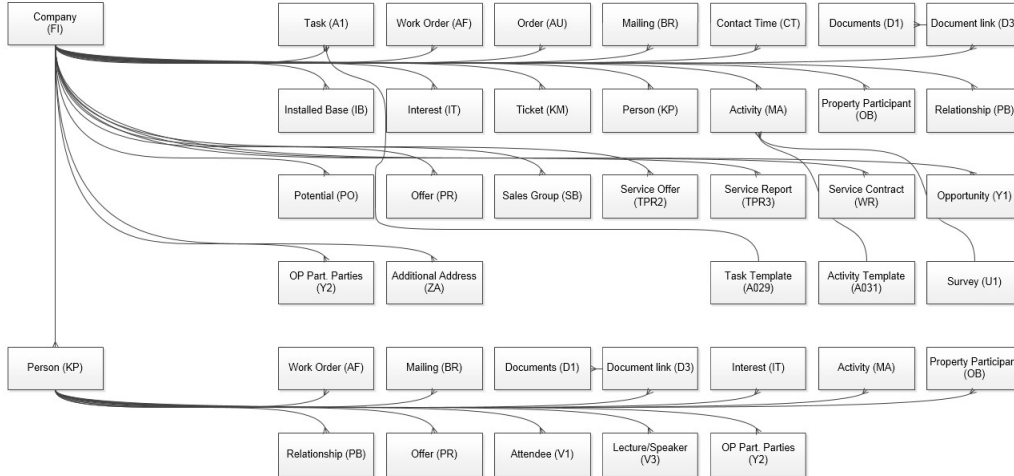
The configuration parameter Schema.EnableLiveCalculations is enabled in TE_ISI for this info area. So interactive business logic, like change of end time when start time gets changed, will be active.

Known Bugs

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

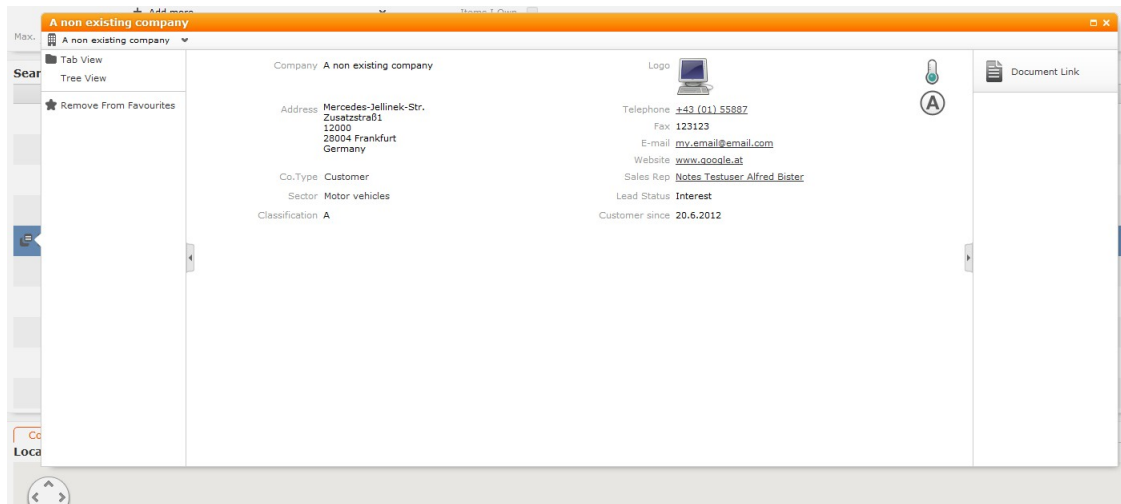
Customer Base(CRM 7000010)

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.



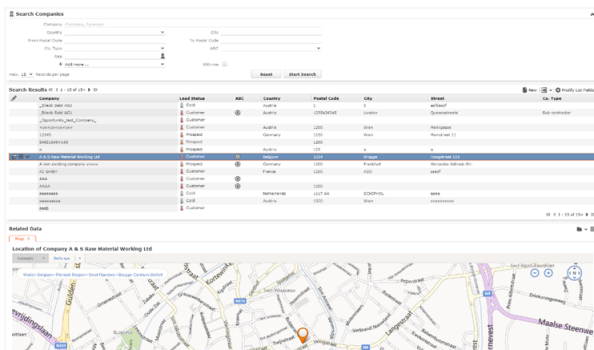
Note: If you want to display the same mask in the quick view as in the detail view you don't have to make any further configurations. The quick view will use the detail mask as configured.

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="/QvAJAZfc/Authenticate.aspx" scheme="Ntlm"/></Authentication>
These servers 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

Other (3 of 20)

TE_QlikView_DocumentName

TE_QlikView_ServerName

TE_QlikView_UserLogin

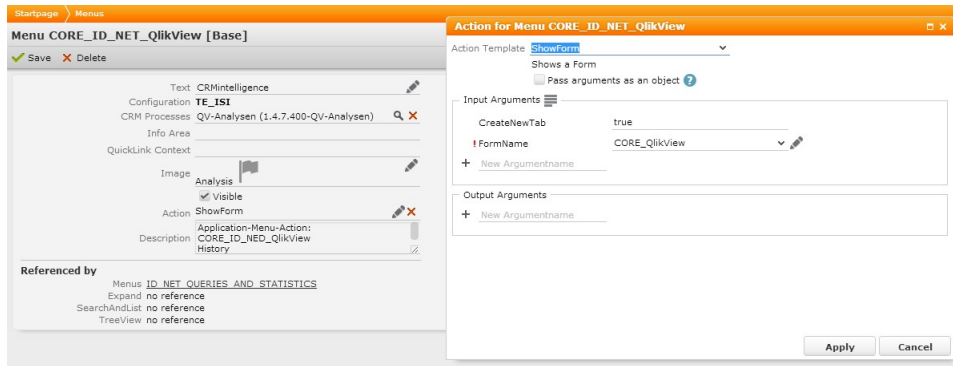
You need to configure the following 3 web configuration parameters in designer to use CRM Intelligence:

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

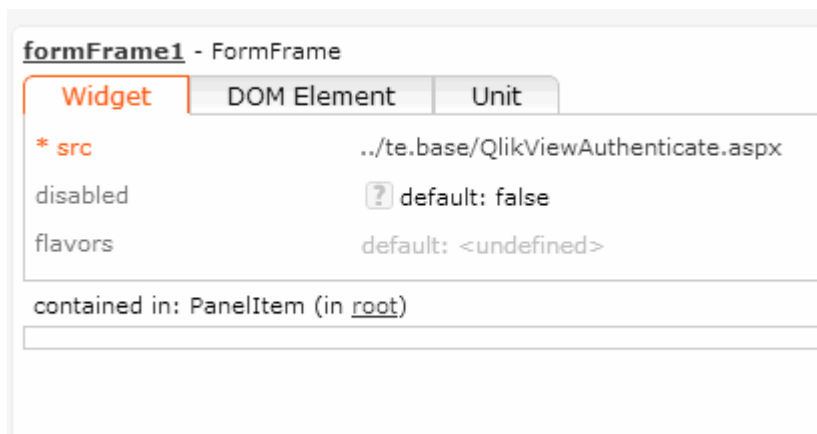
TE_QlikView_ServerName: The name of the server where QlikView is running

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

Business Data

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

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.	hhghzzhz	rgtgvbh	-	-	vzgbhugfzv
Mr.	Max	Rogl	-	-	-
Mr.	-	test	-	12345	-
Mr.	Lidas	XXXX	-	-	-

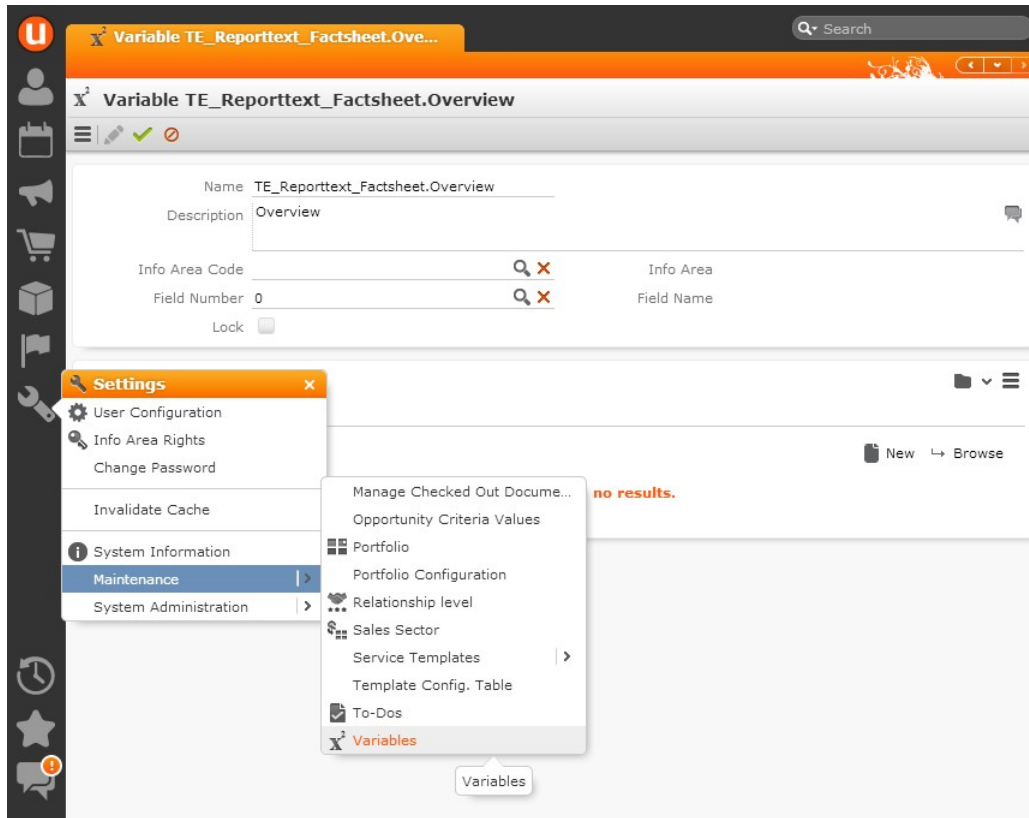
Opportunities

Opportunity	Level	Total Prod. Value	ABC
Philipps TestOpportunity	2 - Qualification	0,00	A
ewhtrvhtweth	1 - Identification	0,00	-
wrfvfevfewf	1 - Identification	0,00	-
g4regewthewhergre	1 - Identification	0,00	-
3q5htrqeqqe	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">
  →
  →<a href="javascript:window.print()">
  →>>
- 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.

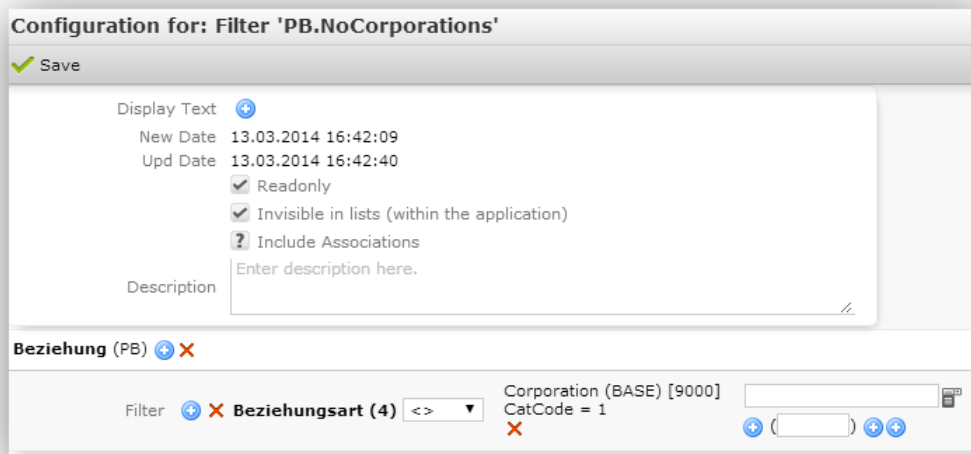
This feature replaces the two features - Company and Person.

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.

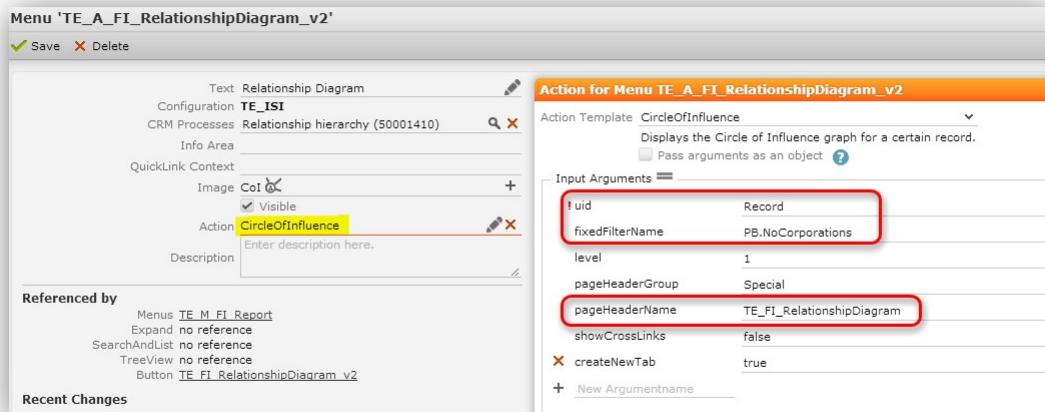
For this feature we are using the default action template “CircleOfInfluence” which is delivered by the product itself. Buttons and menu action:

- 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.



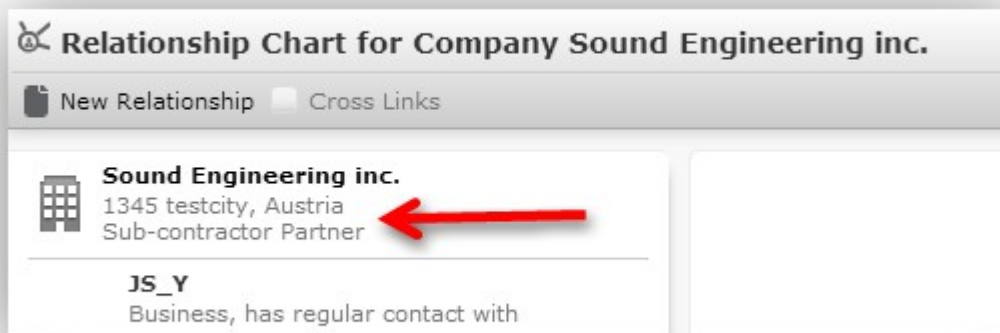
The action which opens the chart looks like this:



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

- TE\_FI\_RelationshipDiagram
- TE\_KP\_RelationshipDiagram

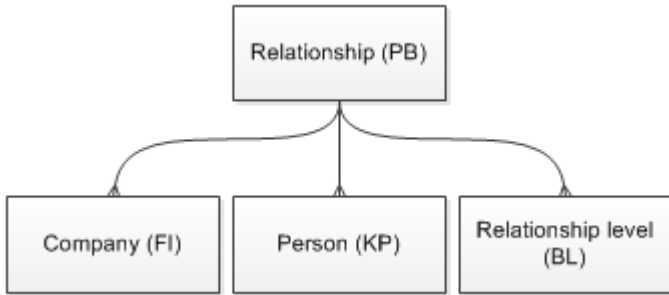
There are special table captions to display detailed information next to the tree:



Used table captions:

- FI.Col
- KP.Col

## Relationship Management (CRM 50001400)

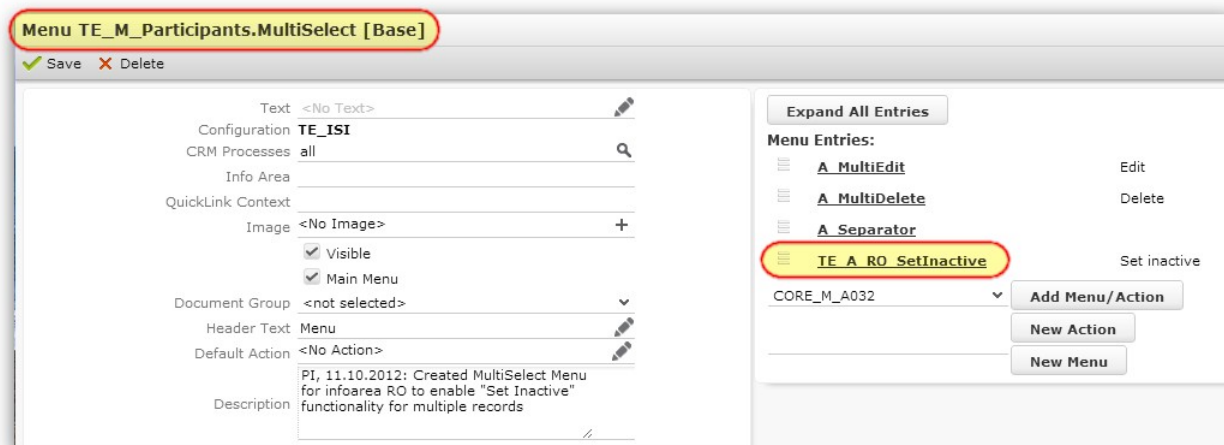


A new menu “TE\_M\_Participants” has been created.

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).

|   | Field     | Function | Field Contents | Reference Fu | Variable     | Direct Reference |
|---|-----------|----------|----------------|--------------|--------------|------------------|
| 0 | Active to | Insert   |                |              | Today's Date |                  |
| 1 | Inactive  |          | Y              |              |              |                  |
|   | New Line  |          |                |              |              |                  |

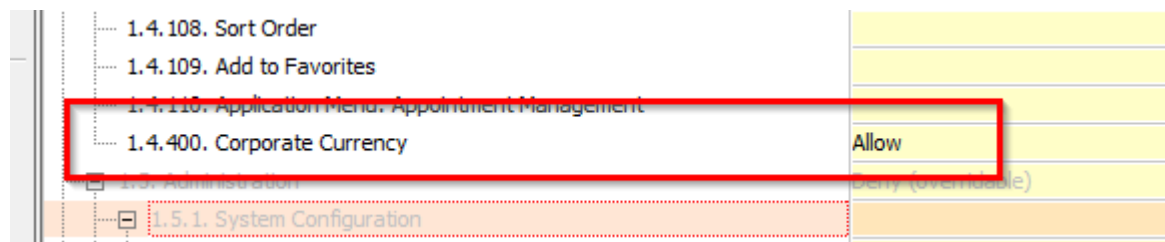
A new menu “TE\_M\_Participants.MultiSelect” has been created to enable the “Set Inactive” functionality for multiple records in a list. Attention: The menu name must contain “.MultiSelect”



## 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 for the following infoareas/fields:

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

| Info area        | Field #         | Reporting Field #  | Field                                |
|------------------|-----------------|--------------------|--------------------------------------|
| Offer            | PR/13<br>PR/167 | PR/5046<br>PR/5047 | Offer Value<br>Offer Value incl. VAT |
| Offer Position   | AP/19<br>AP/112 | AP/5026<br>AP/5027 | Item Value<br>Item Value incl. VAT   |
| Order            | AU/11<br>AU/140 | AU/5006<br>AU/5007 | Order Value<br>Ord. Val. Incl. VAT   |
| Order Item       | UP/17<br>UP/87  | UP/5001<br>UP/5002 | Item Value<br>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<br>WR/21  | WR/5007<br>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 were 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

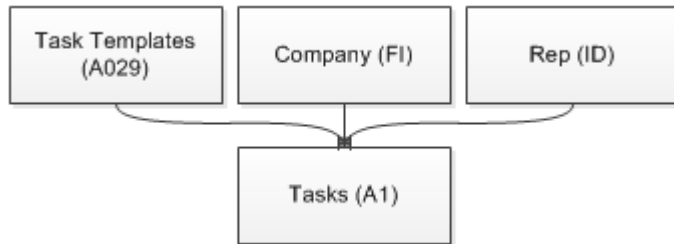
variable using the currency of your project.

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

The screenshot shows the SAP Variable Value configuration interface. The top window, titled 'Variable: up...', displays the configuration for the variable 'update\_CorporateCurrency'. The 'Name' field is highlighted with a red box. Below it, the 'Description' field is empty. The 'Info Area' is set to 'Exchange Rate' and the 'Field Name' is 'Currency'. The bottom window, titled 'Variable Value', shows a table with various fields for configuration, including 'Var. Text', 'Var. Number/Catalog', 'Var. Rep ID', 'Var. Date', 'Var. Time (s)', 'Var. Decimal', 'Var. Logical', and 'Link'. The 'Var. Text' field contains the value 'EUR'.

## 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. Therefore the following items are reused:

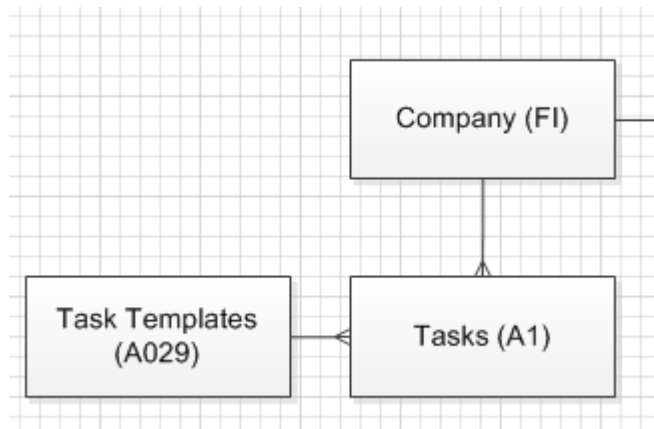
Menus:

- D\_ToDoStatus
- D\_ToDoParticipationStatus

Actions:

- A\_ToDoCompleted
- A\_ToDoMissed
- A\_ToDoAccepted
- A\_ToDoDenied

### Task Templates



|    |      |              |                           |
|----|------|--------------|---------------------------|
| 9  | 4016 | Updated at   | me(hh:mm:ss.ttt)   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:

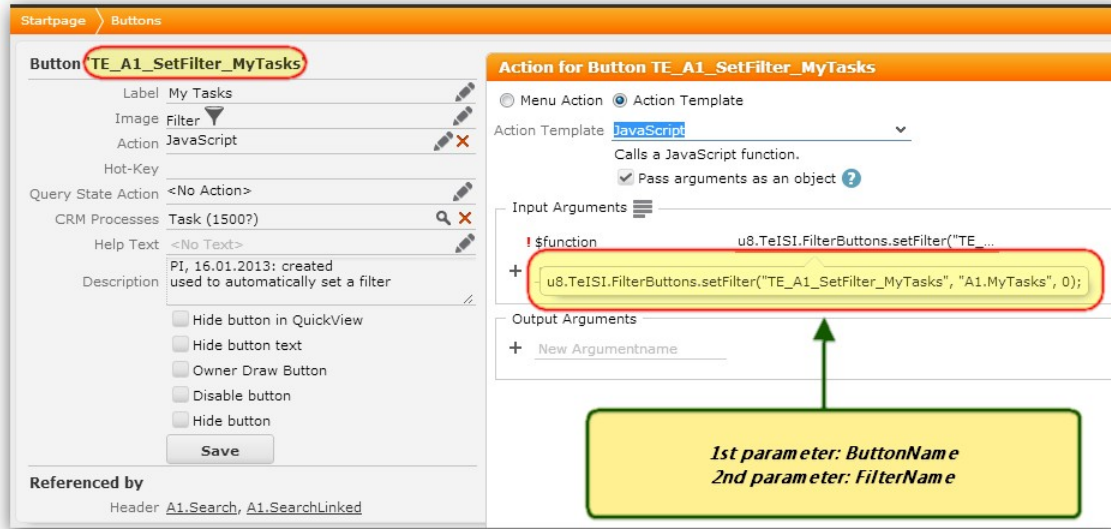
|     |      |                  |                 |         |
|-----|------|------------------|-----------------|---------|
| 120 | 5000 | Connector delete | y/n             |         |
| 121 | 5001 | Status           | var catalog     |         |
| 122 | 6000 | Template         | text(100)       |         |
| 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.



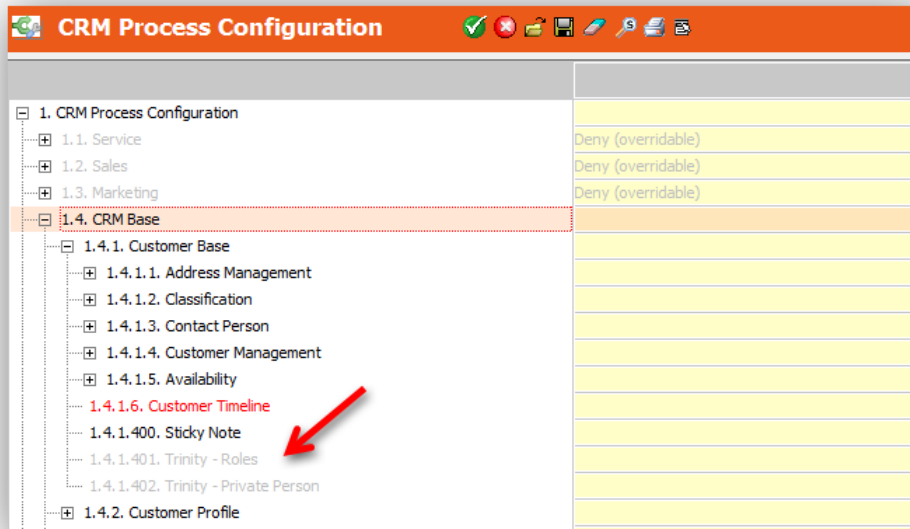
The 'TE\_M\_FI\_Timeline' company context menu holds an additional 'A\_Marketing-Timeline' action. It is also possible to open a Search&List with all timeline notes of the selected record with the 'TE\_A\_TimlineComments' action.

# 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:



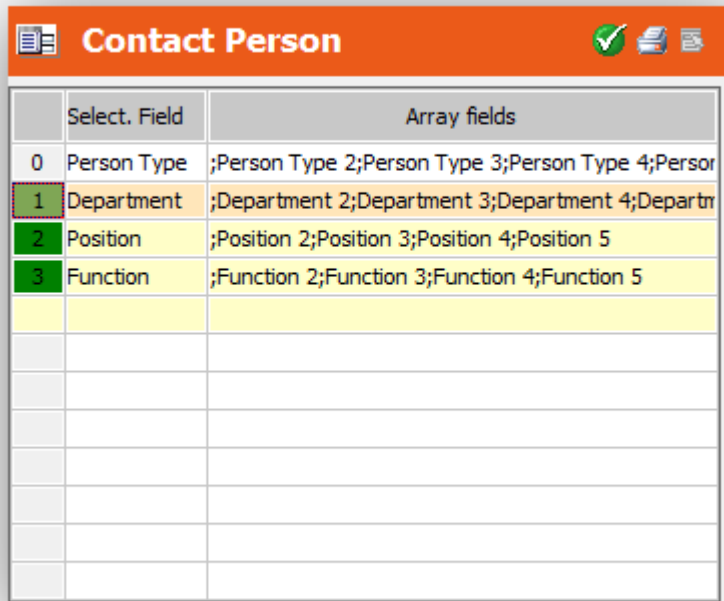
## Datamodel Changes

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)



|   | Select. Field | Array fields                                      |
|---|---------------|---------------------------------------------------|
| 0 | Person Type   | ;Person Type 2;Person Type 3;Person Type 4;Person |
| 1 | Department    | ;Department 2;Department 3;Department 4;Departm   |
| 2 | Position      | ;Position 2;Position 3;Position 4;Position 5      |
| 3 | Function      | ;Function 2;Function 3;Function 4;Function 5      |
|   |               |                                                   |
|   |               |                                                   |
|   |               |                                                   |
|   |               |                                                   |
|   |               |                                                   |
|   |               |                                                   |
|   |               |                                                   |
|   |               |                                                   |

## 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 quicksearch 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

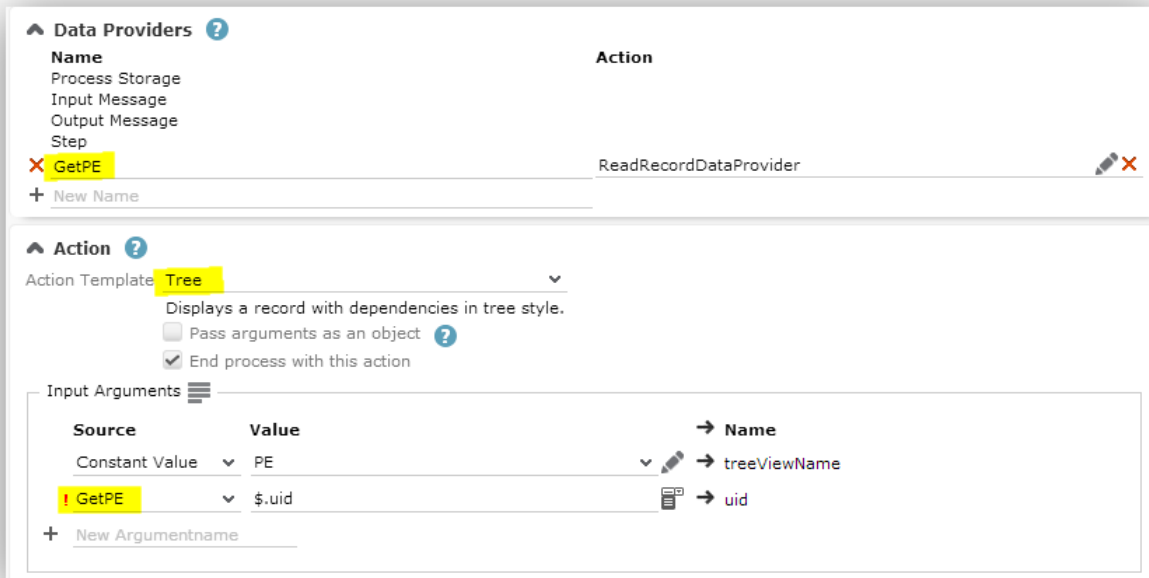
| Data Providers ? |                                                                                                                                                                                                |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name             | Action                                                                                                                                                                                         |
| Process Storage  |                                                                                                                                                                                                |
| Input Message    |                                                                                                                                                                                                |
| Output Message   |                                                                                                                                                                                                |
| Step             |                                                                                                                                                                                                |
| X Read_FI_Link   | ReadRecordDataProvider   |
| X Read_PE_Link   | ReadRecordDataProvider   |
| + New Name       |                                                                                                                                                                                                |

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\_OpenRecordInCompanyTreeview\_Open" with different parameters.

## Open PE from KP

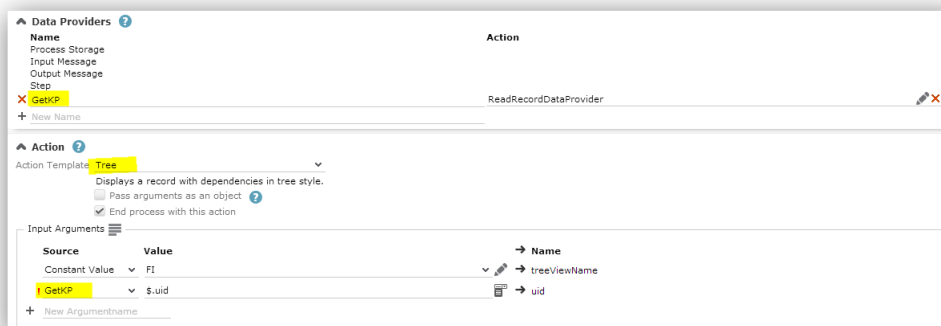
A new menu action "D\_KP\_OpenPE" is visible at the "M\_Person" menu and allows the user to open the PE record out of the KP record. The menu action calls the process "TE\_KP\_OpenPE" which has only 1 process step. In this step we search for the PE record and display it, as you can see on the screenshot:



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.





**Action for DataProvider**

Action Template: **ReadRecordDataProvider**

Data provider that reads a single record from the CRM database. Result type: u8.Crm.BusinessObject

Pass arguments as an object ?

Input Arguments

| Source         | Value             | Name      |
|----------------|-------------------|-----------|
| Input Message  | \$.get("uid")     | uid / uid |
| Constant Value | 0                 | fields    |
| Constant Value | <b>\$Link[KP]</b> | linkName  |

+ New Argumentname

## 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.

**Header 'ExpandChildren', Header Group 'KP'**

Save

Text: **Related Data: (SUBINFOS) of {RECORD}**

Image:

Options:  Show buttons with text  Show buttons in extra line  Use plain style (no borders)  Use page header style  Fixed tab width (SublistTabWidth)

Related View Layout:  Tabs  One column  Two columns

Description: History: added History Infoareas

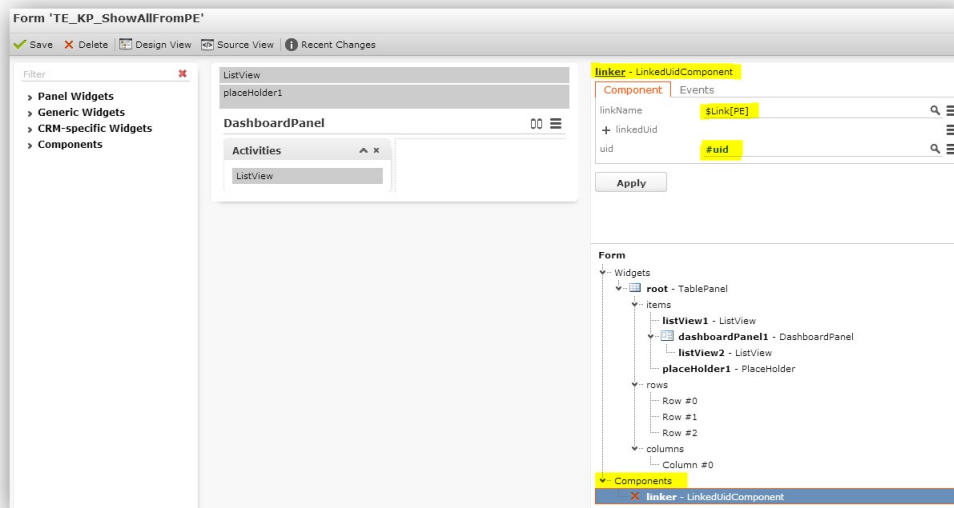
Buttons:

Infoareas

| Order | InfoArea                | Link | CRM Proc | Fieldgroup | Header    | Text     | Filter   | Tab Style | SubListParams | Menu | Search   | Form Name                  | Fla |
|-------|-------------------------|------|----------|------------|-----------|----------|----------|-----------|---------------|------|----------|----------------------------|-----|
| 1     | Contact Time (CT)       |      | all      | no value   | no value  | Default  | no value |           |               |      | no value |                            | 0   |
| 4     | ↑ Note (NO)             |      | no value | NO         | Default   | no value |          |           |               |      | no value |                            | 0   |
| 1     | ↑ Contact Person (pers) |      | no value | no value   | All Roles | no value |          |           |               |      | no value | <b>TE_KP_ShowAllFromPE</b> | 0   |
| 1     | ↑ History (HO)          |      | no value | no value   | Default   | no value |          |           |               |      | no value | RecordHistory              | 0   |

Rep (ID):

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 screenshot 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.

Header 'SearchResultsLinked', Header Group 'TE\_CP\_SublistKP'

Save



Text  

Image

Show buttons with text  Show buttons in extra line  Use plain style (no borders)

Description  
no buttons

Buttons

  TE\_CP\_NewRoleInOtherCompany



This button calls the process “TE\_CP\_NewFromKPSublist” which allows us to create new CP records.

Button 'TE\_CP\_NewRoleInOtherCompany'

Save Delete










Label New Role in other Company 

Image New-Button  


Action Process  

Hot-Key

Query State Action CORE\_C\_CanNew\_disabled  

CRM Processes Trinity - Roles  

Help Text

Description  
button in KP sublist tab (All Roles) 

Hide button in QuickView

Hide button text

Owner Draw Button


Disable button

Hide button


Referenced by  
Header TE\_CP\_SublistKP.SearchResultsLinked

Action for Button TE\_CP\_NewRoleInOtherCompany

Menu Action  Action Template

Action Template Process 

Executes a process.

Pass arguments as an object 

Input Arguments

**name** TE\_CP\_NewFromKPSublist

**uid** Linked

**processState** RequireEnabled

+ New Argumentname

Output Arguments

+ New Argumentname

The process itself looks like this:

The screenshot shows the configuration page for a CRM process named 'TE\_CP\_NewFromKPSublist'. The interface includes a header with 'Save', 'Delete', 'Show Usage', 'Graph', and 'Steps...' buttons. Below the header, there are fields for 'Process' (TE\_CP\_NewFromKPSublist), 'CRM Process' (all), 'Header' (TE\_CP\_NewFromKPSublist), 'Description' (Enter description here.), and 'Help Text'. The 'Initial Step' is set to 'TE\_CP\_NewFromKPSublist\_SelectFI'. The 'Process Phases' section is collapsed. The 'Data Providers' section is expanded, showing a table with columns 'Name' and 'Action'. The 'Process Storage Variables' section is also expanded, showing a table with columns 'Name', 'Data Provider', and 'Value'.

| Name  | Data Provider | Value        |
|-------|---------------|--------------|
| PEuid | Input Message | s.get("uid") |
| Fluid | none          |              |

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 "Fluid"

Furthermore we're dispatching to the next step ("TE\_CP\_NewFromKPSublist\_NewCP")

**Action** ?

Action Template: **ExecuteSelectRecordSubStep** (dropdown)  
 Executes a sub step within a process.  
 Pass arguments as an object ?  
 End process with this action

**Input Arguments**

| Source         | Value                 | Name |
|----------------|-----------------------|------|
| Constant Value | SelectCompany->Return | name |

+ New Argumentname

**ActionTemplate Output Arguments**

**uid** The uid of the selected record.

**Validation** ?

| Source          | Condition | Error Text |
|-----------------|-----------|------------|
| + New Condition |           |            |

**Output Arguments**

| Value | Target          | Name  |
|-------|-----------------|-------|
| uid   | Process Storage | Fluid |

+ New Argumentname

**Dispatching** ?

| Source | Condition                          | Next Step                    | Arguments |
|--------|------------------------------------|------------------------------|-----------|
| Step   | u8.isValidRecordUid(\$.get("uid")) | TE_CP_NewFromKPSublist_Ne... |           |

+ New Condition

In the second step of the process we're displaying the new CP mask, using the "PEuid" and "Fluid" as link records.

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

**Action** ?

Action Template: **ExpandNew**  
 Creates a new record in expanded view.

Pass arguments as an object ?  
 End process with this action

Input Arguments

| Source           | Value           | Name           |
|------------------|-----------------|----------------|
| Constant Value   | CP              | expandName     |
| ! Constant Value | CP              | infoAreaId     |
| Process Storage  | \$.get("PEuid") | link           |
| Process Storage  | \$.get("Fuid")  | link2          |
| Constant Value   | TE_CP_SublistKP | fieldGroupName |

+ New Argumentname

Validation ?

| Source          | Condition | Error Text |
|-----------------|-----------|------------|
| + New Condition |           |            |

Output Arguments

| Value              | Target | Name |
|--------------------|--------|------|
| + New Argumentname |        |      |

**Dispatching** ?

| Source           | Condition | Next Step        | Arguments           |
|------------------|-----------|------------------|---------------------|
| ! Constant Value | true      | ViewRecord->Exit | uid = \$.get("uid") |
| + New Condition  |           |                  |                     |

### 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:

**Menu "D\_KP\_SetPrivateCustomer"**

Save Delete

Text: Set as "Private Customer"

Configuration: **TE\_ISI**

CRM Processes: Trinity - Private Person

Info Area: PE

QuickLink Context: <No Image>

Image:  Visible

Action: Trigger

Description: Menu-Action to set the field #86 on the PE record to true. This menu action is disabled if the field #86

Referenced by:

- Menus: M\_Person
- Expand: no reference
- SearchAndList: no reference
- TreeView: no reference
- Button: no reference

**Action for Menu D\_KP\_SetPrivateCustomer**

Action Template: **Trigger**  
 Calls a trigger  
 Pass arguments as an object ?

Input Arguments

|                  |                                         |
|------------------|-----------------------------------------|
| ! name           | PE_UPD_SetPrivateCustomer               |
| uid              | Record                                  |
| callbackFunction | javascript:u8.session.refreshWorkWindow |

+ New Argumentname

Output Arguments

+ New Argumentname

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:

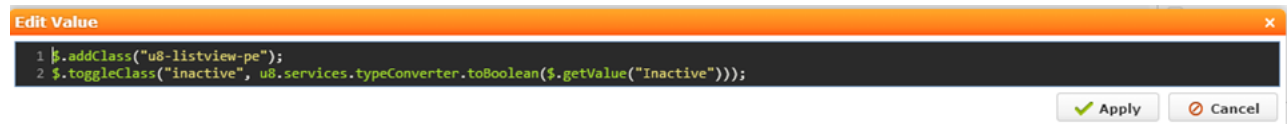
- TE\_PE\_SelectPersonOrNew
- TE\_PE\_New

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

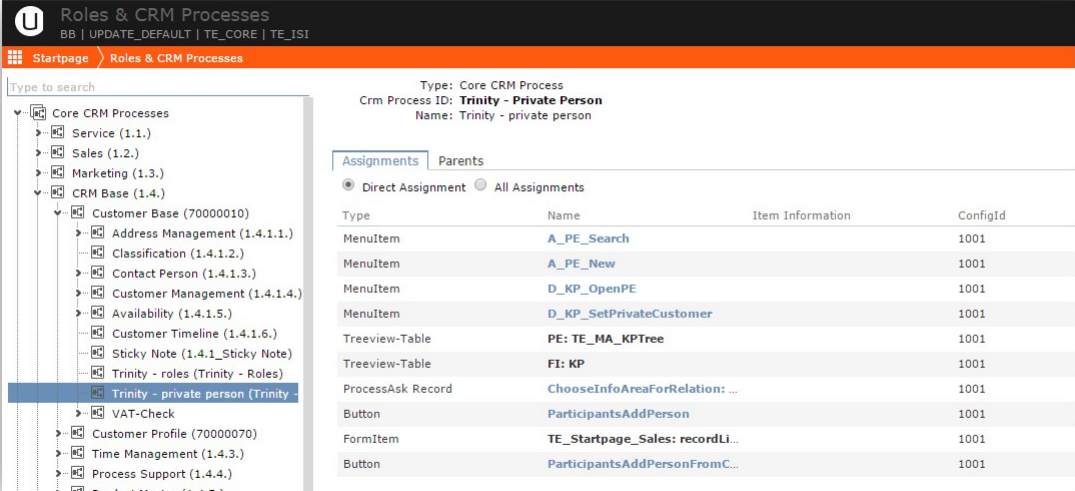
Learn how to upgrade to template version 5.

Steps you have to do:

- Patch your system to the latest WIN version (8.2.8.2568 or higher)
- Patch your 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:



The screenshot displays the SAP Roles & CRM Processes designer. The left pane shows a tree view of CRM processes, with 'Trinity - private person (Trinity)' selected. The right pane shows the configuration details for this process, including a table of assignments.

Type: Core CRM Process  
Crm Process ID: **Trinity - Private Person**  
Name: trinity - private person

Assignments Parents

Direct Assignment  All Assignments

| Type              | Name                            | Item Information | ConfigId |
|-------------------|---------------------------------|------------------|----------|
| MenuItem          | A_PE_Search                     |                  | 1001     |
| MenuItem          | A_PE_New                        |                  | 1001     |
| MenuItem          | D_KP_OpenPE                     |                  | 1001     |
| MenuItem          | D_KP_SetPrivateCustomer         |                  | 1001     |
| Treeview-Table    | PE: TE_MA_KPTree                |                  | 1001     |
| Treeview-Table    | FI: KP                          |                  | 1001     |
| ProcessAsk Record | ChooseInfoAreaForRelation: ...  |                  | 1001     |
| Button            | ParticipantsAddPerson           |                  | 1001     |
| FormItem          | TE_Startpage_Sales: recordLI... |                  | 1001     |
| Button            | ParticipantsAddPersonFromC...   |                  | 1001     |



## Visit Planning with map support

Learn to use map to plan your day.

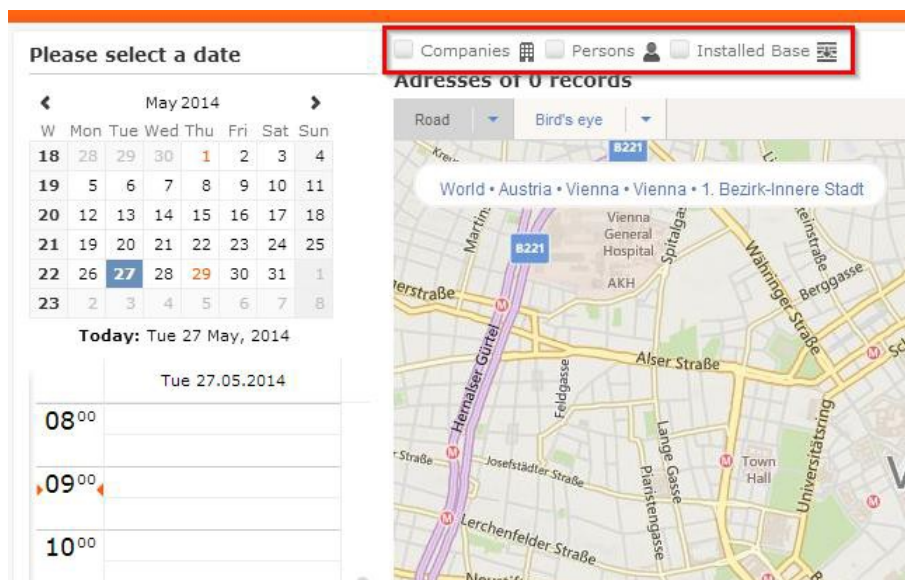
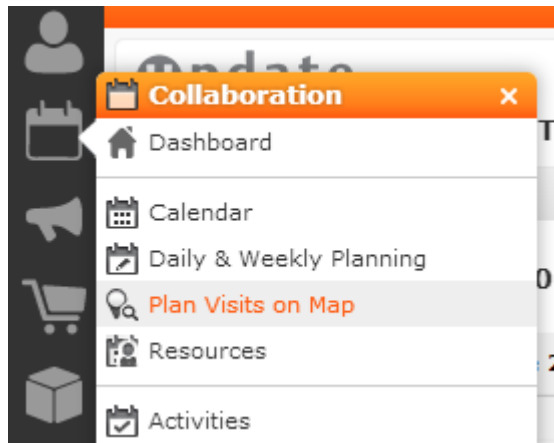
---

**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:

Plan Visit on Map

Adjust Layout & Fields

Overview

Company JOST AG Address Herren...  
 Synonym Y1 teste  
 Rep TE\_ISI 1010 W  
 Austria

Classification

Co. Type Customer ABC A

Please select a date

May 2014

| W  | Mon | Tue | Wed | Thu | Fri | Sat | Sun |
|----|-----|-----|-----|-----|-----|-----|-----|
| 18 | 28  | 29  | 30  | 1   | 2   | 3   | 4   |
| 19 | 5   | 6   | 7   | 8   | 9   | 10  | 11  |
| 20 | 12  | 13  | 14  | 15  | 16  | 17  | 18  |
| 21 | 19  | 20  | 21  | 22  | 23  | 24  | 25  |
| 22 | 26  | 27  | 28  | 29  | 30  | 31  | 1   |
| 23 | 2   | 3   | 4   | 5   | 6   | 7   | 8   |

Today: Tue 27 May, 2014

Tue 27.05.2014

08<sup>00</sup>

09<sup>00</sup>

JOST AG

Location of JOST AG

World • Austria • Vienna • Vienna • 10. Bezirk-Favoriten

Map showing location of JOST AG in Vienna, Austria, with a red location pin. The map includes street names like 'Carl-Appel-Straße' and 'Tries', and a search bar showing 'World • Austria • Vienna • Vienna • 10. Bezirk-Favoriten'.

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 javascript 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

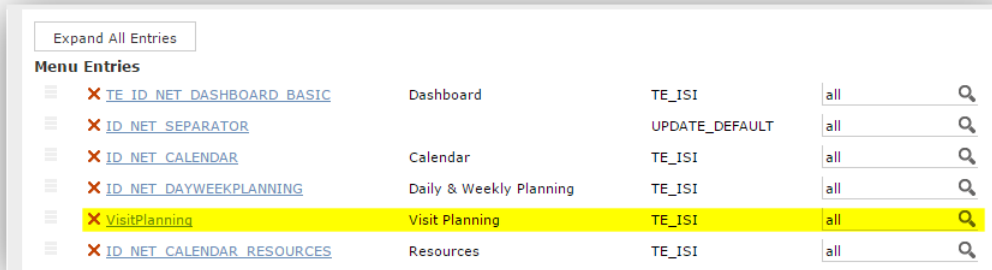
TE\_KP\_GeoPlanVisit

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

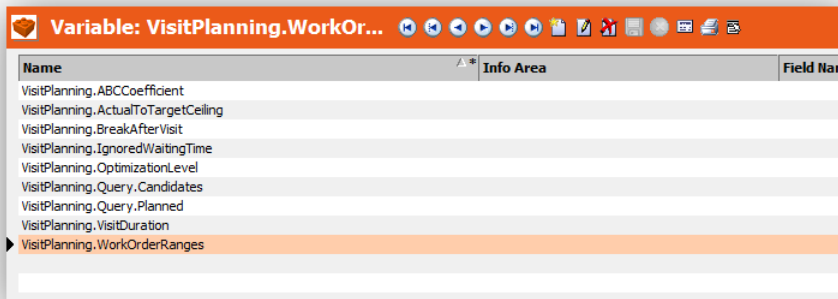


| Expand All Entries  |                                             |                         |                |     |   |
|---------------------|---------------------------------------------|-------------------------|----------------|-----|---|
| <b>Menu Entries</b> |                                             |                         |                |     |   |
| ☰                   | ✗ <a href="#">TE_ID_NET_DASHBOARD_BASIC</a> | Dashboard               | TE_ISI         | all | 🔍 |
| ☰                   | ✗ <a href="#">ID_NET_SEPARATOR</a>          |                         | UPDATE_DEFAULT | all | 🔍 |
| ☰                   | ✗ <a href="#">ID_NET_CALENDAR</a>           | Calendar                | TE_ISI         | all | 🔍 |
| ☰                   | ✗ <a href="#">ID_NET_DAYWEEKPLANNING</a>    | Daily & Weekly Planning | TE_ISI         | all | 🔍 |
| ☰                   | ✗ <a href="#">VisitPlanning</a>             | Visit Planning          | TE_ISI         | all | 🔍 |
| ☰                   | ✗ <a href="#">ID_NET_CALENDAR_RESOURCES</a> | Resources               | TE_ISI         | all | 🔍 |

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

```
TE_VisitPlanning_Candidates
TE_VisitPlanning_Planned
```

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



| Name                                | Info Area | Field Name |
|-------------------------------------|-----------|------------|
| VisitPlanning.ABCCoefficient        |           |            |
| VisitPlanning.ActualToTargetCeiling |           |            |
| VisitPlanning.BreakAfterVisit       |           |            |
| VisitPlanning.IgnoredWaitingTime    |           |            |
| VisitPlanning.OptimizationLevel     |           |            |
| VisitPlanning.Query.Candidates      |           |            |
| VisitPlanning.Query.Planned         |           |            |
| VisitPlanning.VisitDuration         |           |            |
| ▶ VisitPlanning.WorkOrderRanges     |           |            |

# 3

## Marketing

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

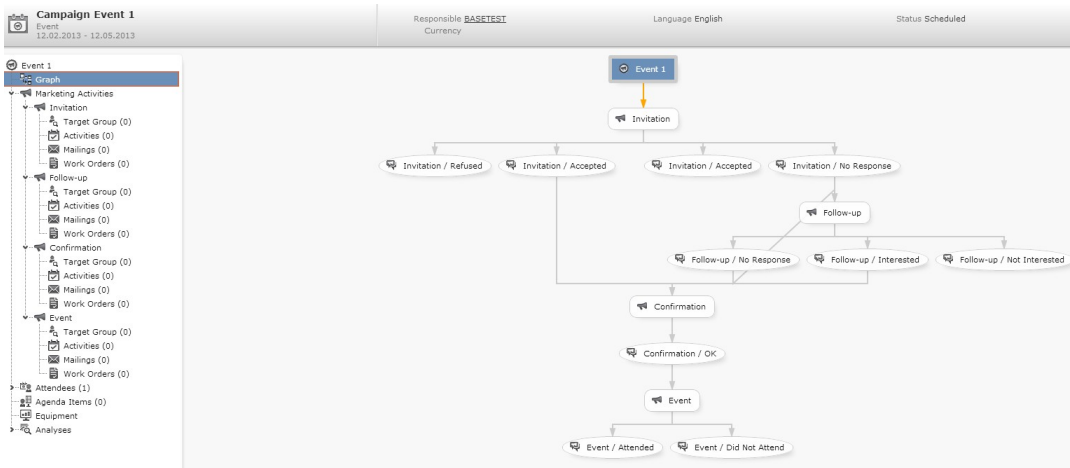
Marketing activity combines the active campaign for products with the aim to drive sales. Below topics discusses in detail the various activities that relates to marketing:

### Campaign Management(CRM #70000080)

Learn about configurations for Campaign management.

#### Graph

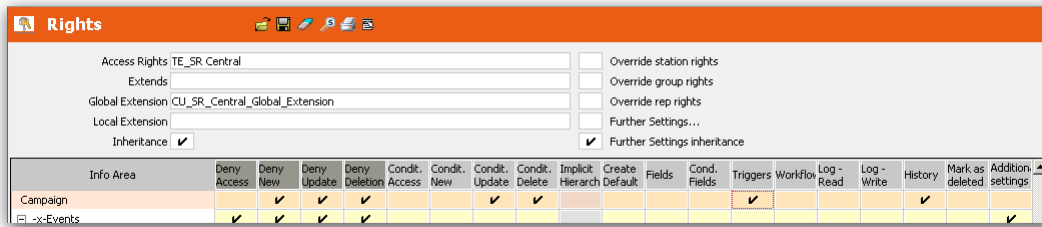
A campaign graph has been implemented into the tree to quickly navigate inside the campaign. The graph node shows the 'CORE\_CM\_CampaignGraph' form.



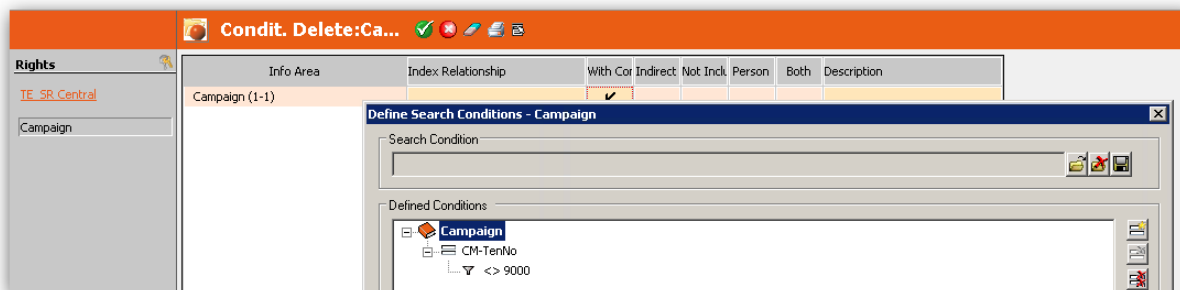
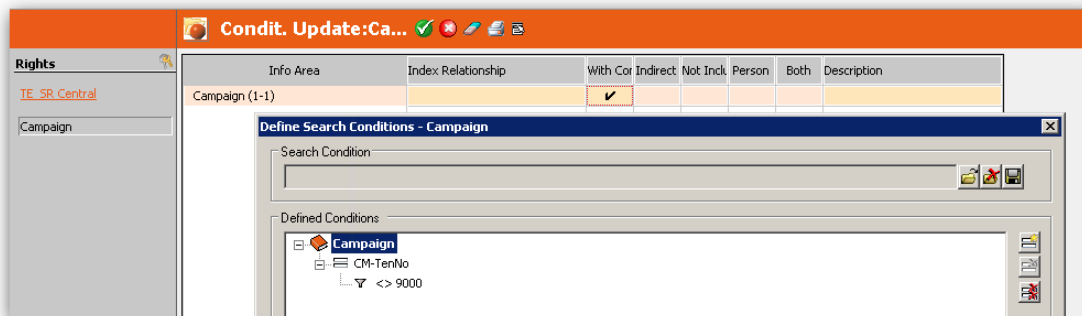
#### Rights & Triggers

- **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.



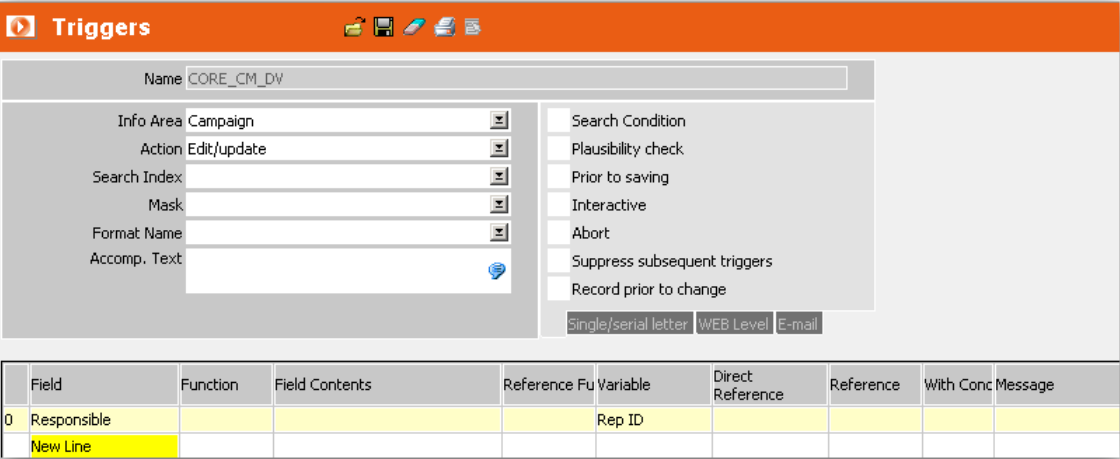
It is also defined that records with tenant 9000 are not allowed to be updated or deleted as they are part of the template and should be “upgradeable”.



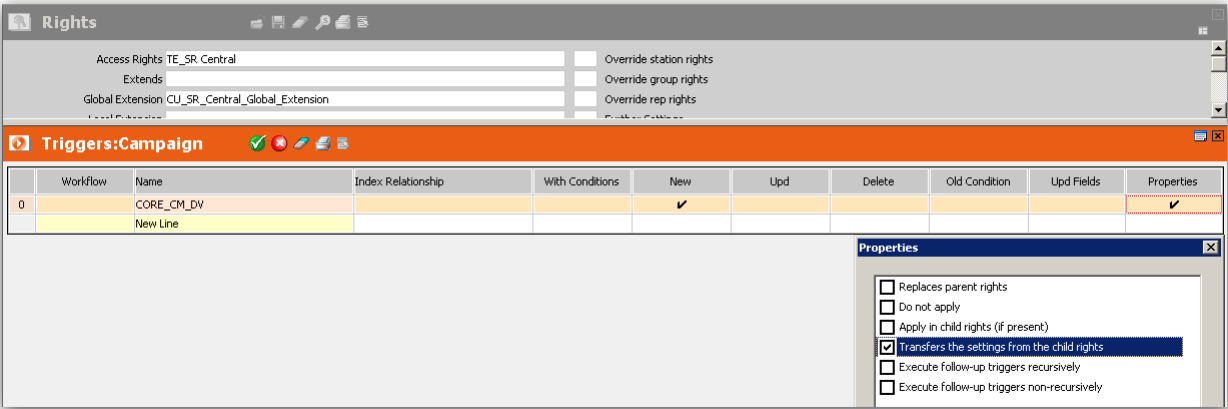
- **Trigger for Campaign (CM) Info Area**

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.

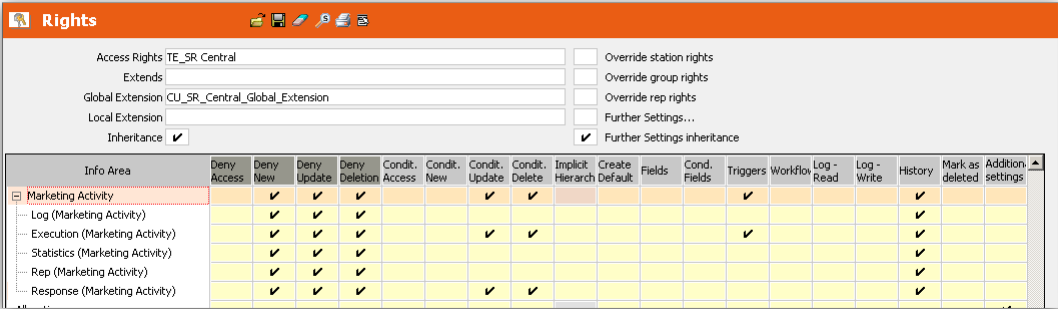


The trigger can be overwritten in a child right:

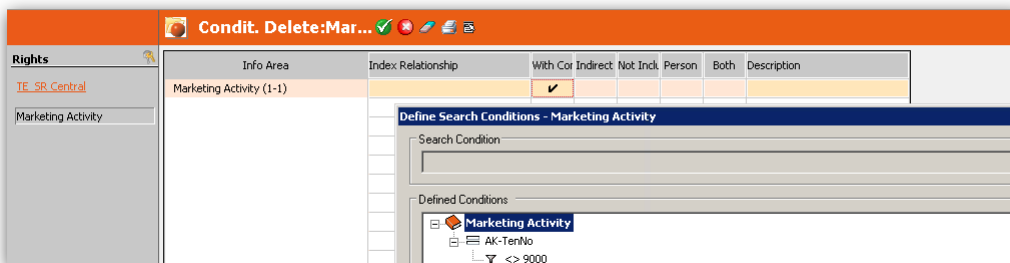
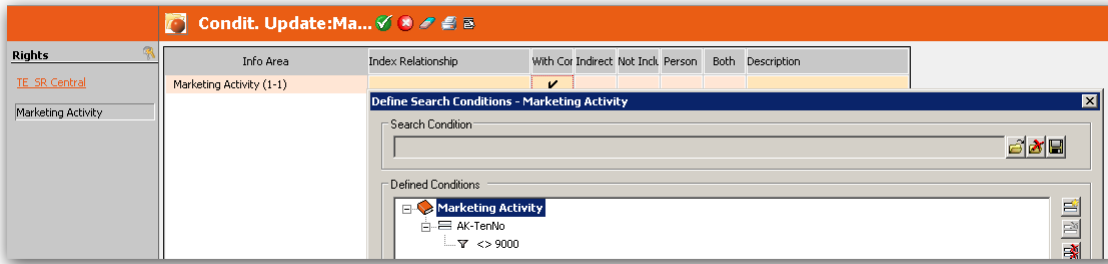


- **Rights for Marketing Activity (AK) Info Area**

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



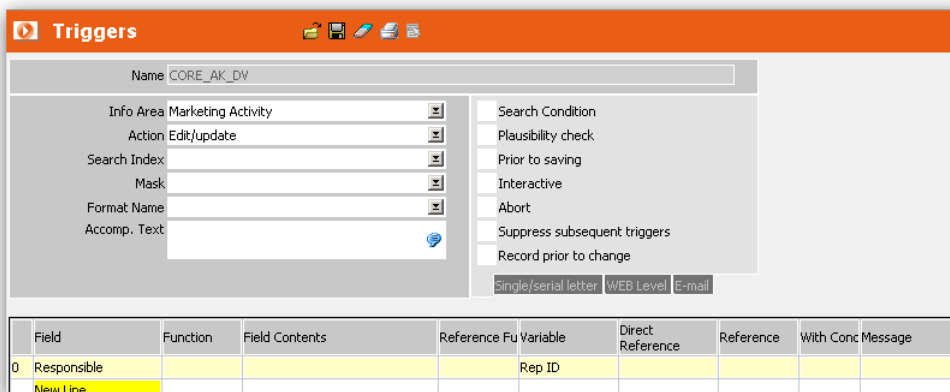
It is also defined that records with tenant 9000 are not allowed to be updated or deleted as they are part of the template and should be “upgradeable”.



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

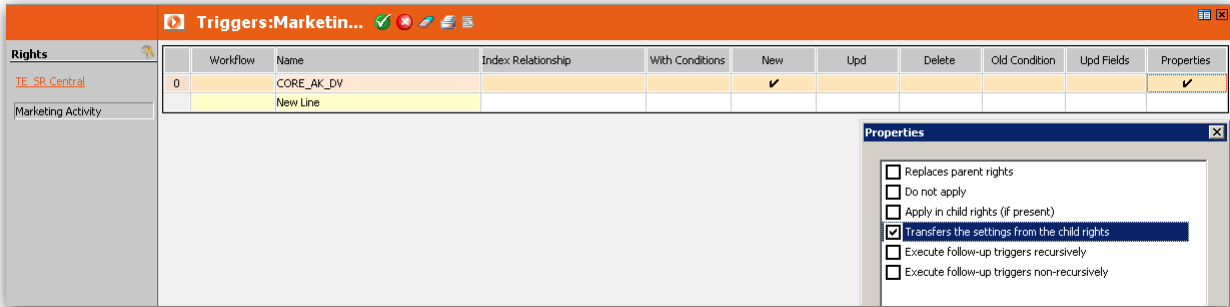
Trigger CORE\_AK\_DV

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.



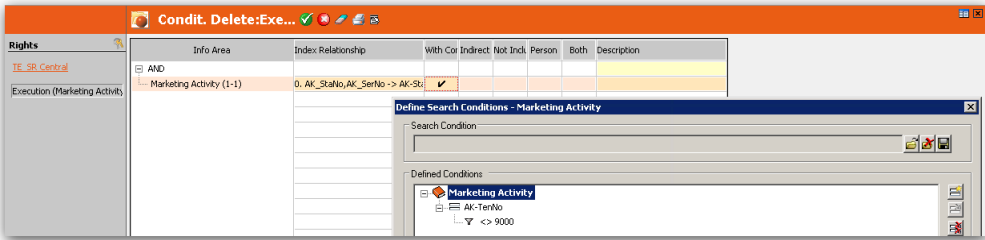
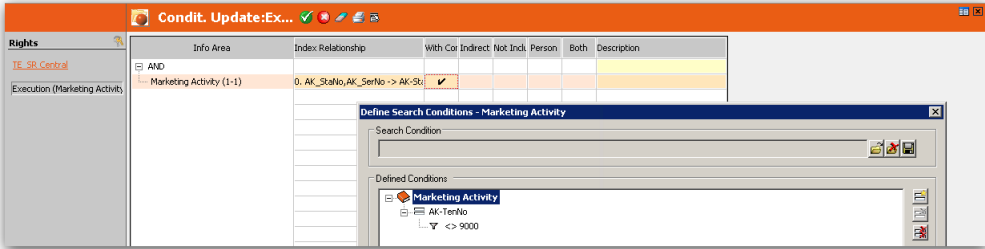
The trigger can be overwritten in a child right:



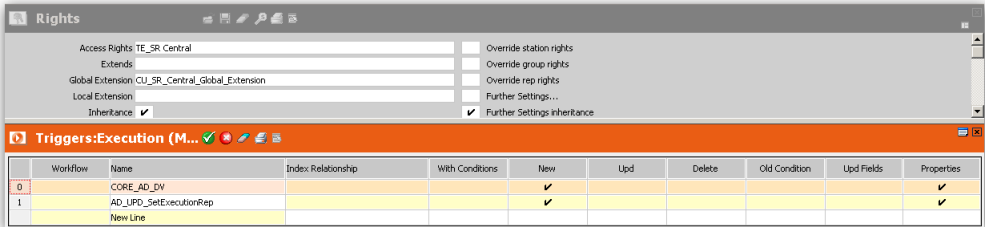


• Rights for the Execution (Marketing Activity) (AD) Info Area

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”.

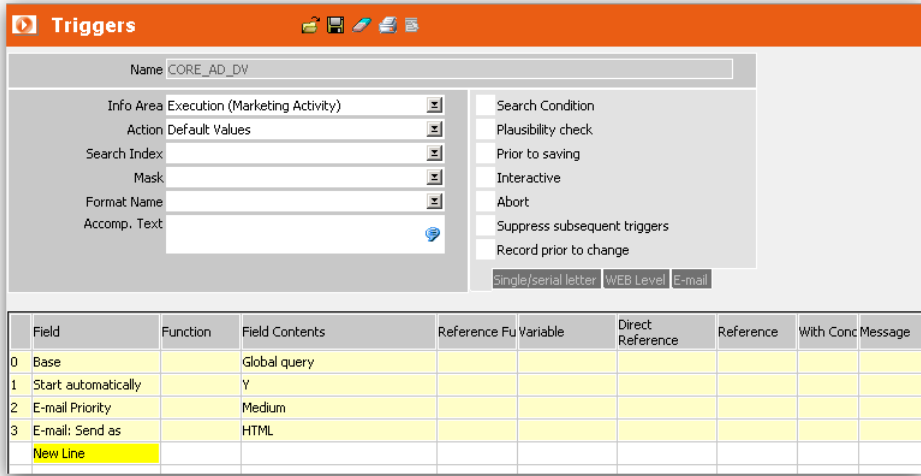


• Trigger for Execution (Marketing Activity) (AD) Info Area

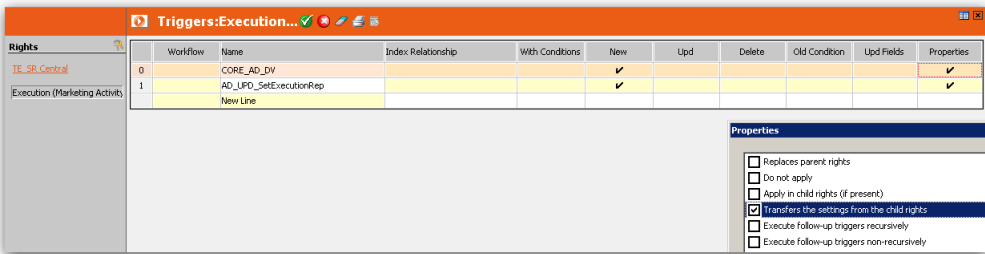


CORE\_AD\_DV Trigger

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:

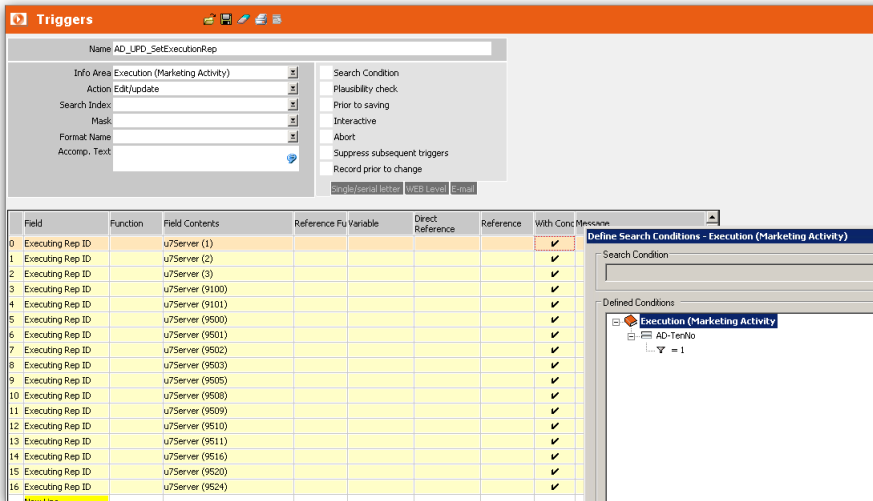


### AD\_UPD\_SetExecutionRep Trigger

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).

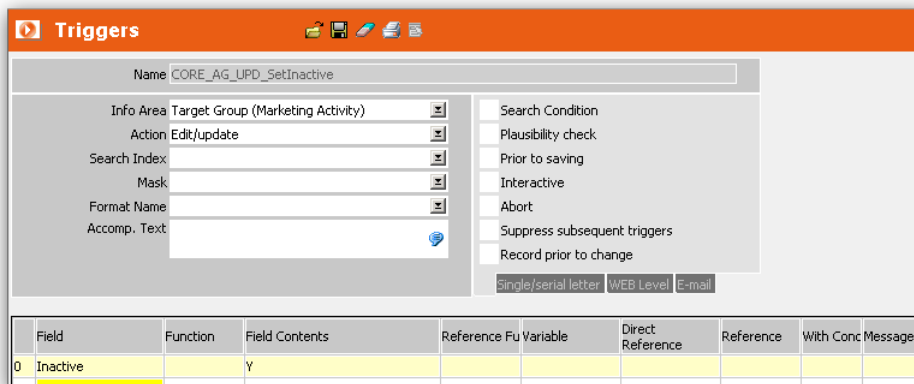
In a project: If a new tenant is created for an installation, then this trigger has to be adapted:



### CORE\_AD\_UPD\_ExecuteMarketingActivity Trigger

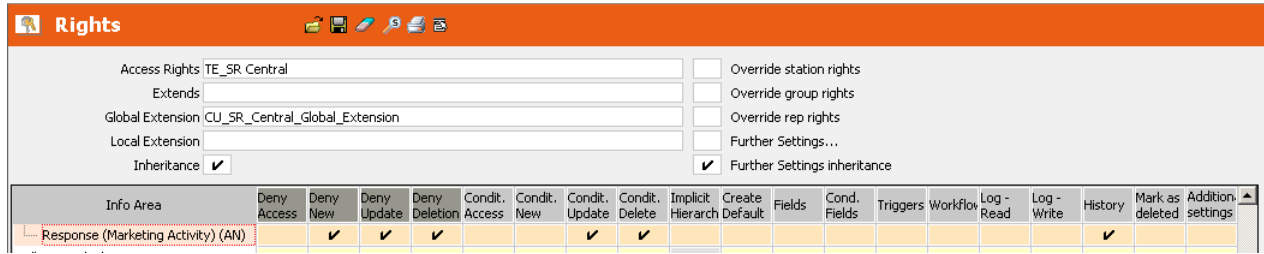
- Trigger for Target Group (Marketing Activity) (AG) Info Area  
CORE\_AG\_UPD\_SetInactive Trigger

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.

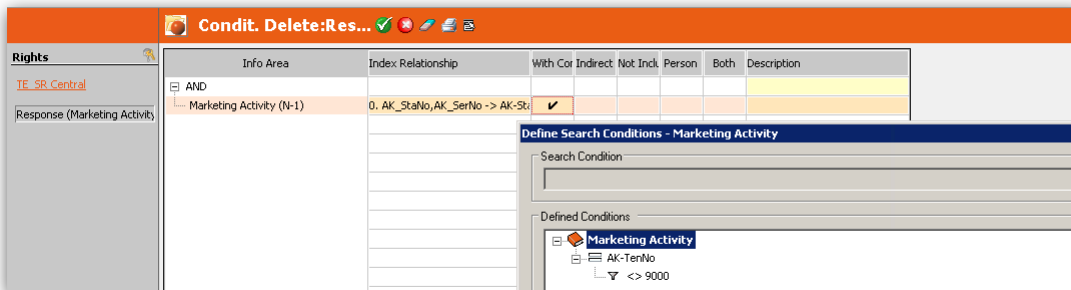
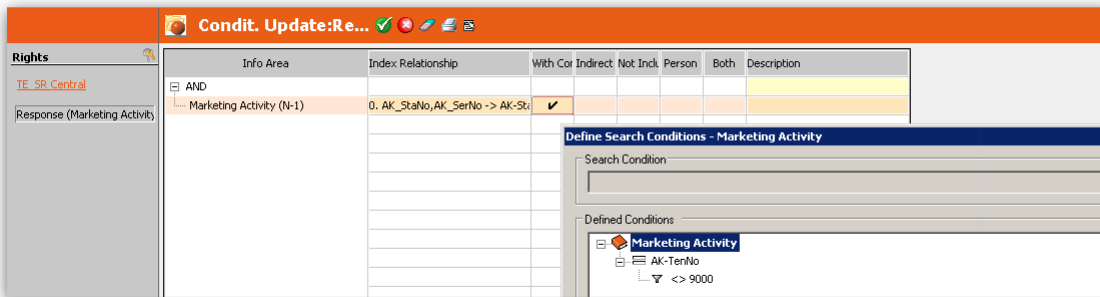


- Rights for Response (Marketing Activity) (AN) Info Area

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.

| Info Area                     | Deny Access | Deny New | Deny Update | Deny Deletion | Condit. Access | Condit. New | Condit. Update | Condit. Delete | Implicit Hierarch | Create Default | Fields | Cond. Fields | Triggers | Workflo | Log - Read | Log - Write | History | Mark as deleted | Addition. settings |
|-------------------------------|-------------|----------|-------------|---------------|----------------|-------------|----------------|----------------|-------------------|----------------|--------|--------------|----------|---------|------------|-------------|---------|-----------------|--------------------|
| Marketing Activity (AK)       |             | ✓        | ✓           | ✓             |                |             | ✓              | ✓              |                   |                |        |              | ✓        |         |            |             | ✓       |                 |                    |
| Log (Marketing Activity) (AO) |             | ✓        | ✓           | ✓             |                |             |                |                |                   |                |        |              |          |         |            |             |         | ✓               |                    |

• **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.

| Info Area                            | Deny Access | Deny New | Deny Update | Deny Deletion | Condit. Access | Condit. New | Condit. Update | Condit. Delete | Implicit Hierarch | Create Default | Fields | Cond. Fields | Triggers | Workflo | Log - Read | Log - Write | History | Mark as deleted | Addition. settings |
|--------------------------------------|-------------|----------|-------------|---------------|----------------|-------------|----------------|----------------|-------------------|----------------|--------|--------------|----------|---------|------------|-------------|---------|-----------------|--------------------|
| Statistics (Marketing Activity) (AX) |             | ✓        | ✓           | ✓             |                |             |                |                |                   |                |        |              |          |         |            |             |         | ✓               |                    |
| Rep (Marketing Activity) (AI)        |             | ✓        | ✓           | ✓             |                |             |                |                |                   |                |        |              |          |         |            |             |         | ✓               |                    |

**Label Formats  
German (Base)**

**Define Label**

Label: German (BASE)

Use additional address:

Label

Greeting

Male: Sehr geehrter {KP0\*Form of address}

Female: Sehr geehrte {KP0\*Form of address}

Unknown: Sehr geehrte {KP0\*Form of address}

Gender

Male: Herr

Female: Frau

Unknown: Damen und Herren

Elements/Wildcard

Company  Full title

Person  Line break

Country code  No blank

Insert merge fields

```
{F12*Company}
{KP0*Form of address} {KP3*First Name} {KP2*Last Name}

{F110*Street}
{F17*Postal Code} {F18*City}
{F15*Country}
```

(Insert elements with the <Insert> key or by double-clicking)

OK Cancel

English (UK) (BASE)

**Define Label**

Label: English (UK) (BASE)

Use additional address:

Label

Greeting

Male: Dear {KP0\*Form of address} {KP2\*L}

Female: Dear {KP0\*Form of address} {KP2\*L}

Unknown: Dear {KP0\*Form of address}!

Gender

Male: Mr.

Female: Mrs.

Unknown: Mr. / Mrs.

Elements/Wildcard

Company  Full title

Person  Line break

Country code  No blank

Insert merge fields

```
{F12*Company}
{KP0*Form of address} {KP3*First Name} {KP2*Last Name}

{F110*Street}
{F18*City}
{F17*Postal Code}
{F15*Country}
```

(Insert elements with the <Insert> key or by double-clicking)

OK Cancel

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.

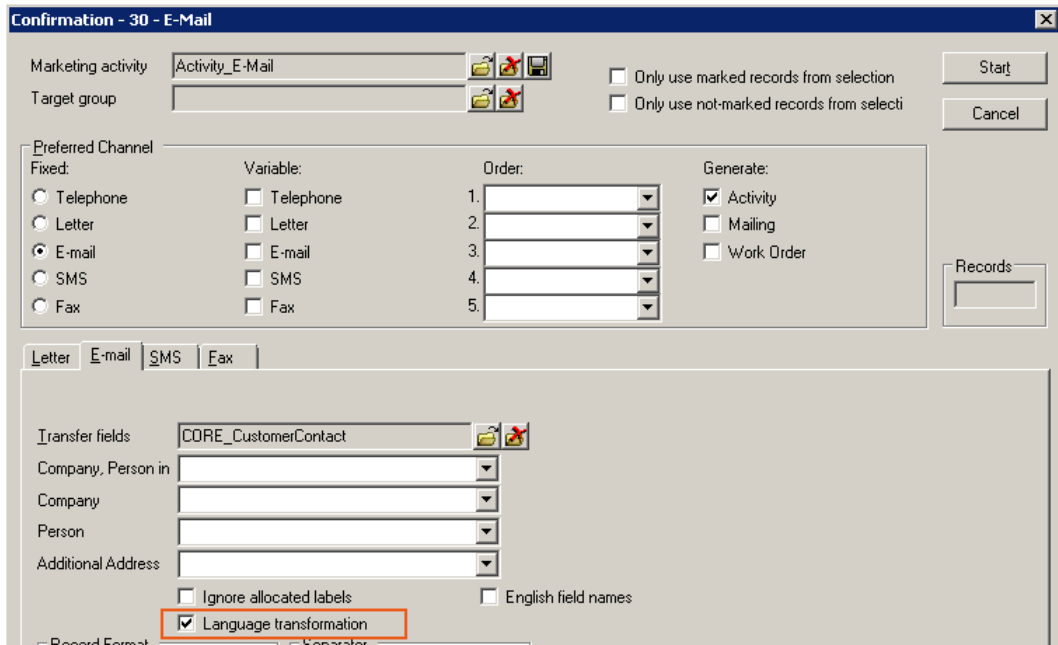
## Campaign Templates

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                                                                                                                                                                    |
|-----------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <pre>&lt;%%\$IF KPLanguage = 'Deutsch'%%&gt; Betreff: Produktinfor- mation &lt;%%\$ELSE%%&gt; Subject: Product Informa- tion &lt;%%\$FI%%&gt;</pre> | <p><b>Update</b></p> <p><small>update software AG   Opengasse 17-21   A-1040 Wien</small></p> <p><b>Betreff: Produktinformation</b></p> <p>Sehr geehrter Herr Steinhölzer!</p> <p>Wir freuen uns, Sie über unser neues Produkt informieren zu können.</p> | <p><b>Update</b></p> <p><small>update software AG   Opengasse 17-21   A-1040 Wien</small></p> <p><b>Subject: Product Information</b></p> <p>Dear Mrs. Swaney!</p> <p>We are happy to inform you about our new product.</p> |

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                   | Chnese                  |
| 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             | Finois                 | Finlandés               | Finland.                |
| French (BASE)     | French              | Français               | Francés                 | Francesse               |
| 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

| 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 |        | Telephone 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))

| Nr. | Text     | Code | Origineleinstellung | 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))

| Nr. | Text           | Code | Origineleinstellung | 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 Kont | Does Not Want Con   |

Code 4:

TE\_German: Möchte keinen Kontakt mehr

TE\_English: Does Not Want Contact Any More

9 Wichtigkeit (Aktivität (MA))

| Nr. | Text    | 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        | 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           | 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          | Cancelled        |                  | 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        | 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 / Query    | Selection        |                  | Selektion / Abfrage | Selection / Query   |
| 1   | Zielgruppe  |      |                     |        |                 | Zielgruppe           | Target Group     |                  | Zielgruppe          | Target Group        |
| 2   | Generiert   |      |                     |        |                 | Generiert            | Generated        |                  | Generiert           | Generated           |
| 3   | erledigt    |      |                     |        |                 | erledigt             | Completed        |                  | Erledigt            | Completed           |
| 4   | abgebrochen |      |                     |        |                 | abgebrochen          | Cancelled        |                  | Abgebrochen         | Cancelled           |
| 5   | Archiv      |      |                     |        |                 | Archiv               | Archive          |                  | Archiv              | Archived            |
| 6   | Vorlage     |      |                     |        |                 | Vorlage              | Template         |                  | Vorlage             | Template            |

Einheit Reaktionszeit/SLA (Angebot (PR))

| Fixe Katalo... |                                     | Einheit Reaktion... |                     |        |                 |                      |                  |                  |                    |                     |
|----------------|-------------------------------------|---------------------|---------------------|--------|-----------------|----------------------|------------------|------------------|--------------------|---------------------|
| Nr.            | Text                                | Code                | Originaleinstellung | Symbol | Referenz (Text) | Spe Sprachunabhängig | Spe 0001 TE_Base | Spe 0002 TE_Docu | Spe 0100 TE_German | Spe 0101 TE_English |
| 48             | Einheit Reaktionszeit/SLA (Angeb... | 0                   |                     |        |                 |                      |                  |                  |                    |                     |
| 49             | Durchführungsart (Durchführung...   | 1                   | Min                 |        |                 | Minute(s)            | Min              |                  | Minute(n)          | Minute(s)           |
| 50             | SAP Abgl.Modus (Firma (FI))         | 2                   | Std                 |        |                 | Hour(s)              | Hours            |                  | Stunden(n)         | Hour(s)             |
| 51             | SAP Abgl.Status (Firma (FI))        | 3                   | Tag(e)              |        |                 | Tag(e)               | Day(s)           |                  | Tage(e)            | Day(s)              |
| 52             | Typ (To-Do (TD))                    | 4                   | Woche(n)            |        |                 | Woche(n)             | Week(s)          |                  | Wochen(n)          | Week(s)             |
| 53             | Teilnahmeart (To-Do (TD))           | 5                   | Monat(e)            |        |                 | Monat(e)             | Month(s)         |                  | Monat(e)           | Month(s)            |
| 54             | Status (Absence (A3))               | 6                   | Jahr(e)             |        |                 | Jahr(e)              | Year(s)          |                  | Jahr(e)            | Year(s)             |

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

| Fixe Katalo... |                                   | Durchführungs... |                         |        |                 |                      |                      |                  |                       |                     |
|----------------|-----------------------------------|------------------|-------------------------|--------|-----------------|----------------------|----------------------|------------------|-----------------------|---------------------|
| Nr.            | Text                              | Code             | Originaleinstellung     | Symbol | Referenz (Text) | Spe Sprachunabhängig | Spe 0001 TE_Base     | Spe 0002 TE_Docu | Spe 0100 TE_German    | Spe 0101 TE_English |
| 49             | Durchführungsart (Durchführung... | 0                |                         |        |                 |                      |                      |                  |                       |                     |
| 50             | SAP Abgl.Modus (Firma (FI))       | 1                | einmalig, Selektion/... |        |                 | One-off: Create tar  | One-off, execute se  |                  | Einmalig: Zielgruppe  | One-off: Create tar |
| 51             | SAP Abgl.Status (Firma (FI))      | 2                | einmalig, Selektion n   |        |                 | One-off: Do not exe  | One-off, do not exe  |                  | Einmalig: Selektion n | One-off: Do not exe |
| 52             | Typ (To-Do (TD))                  | 3                | einmalig, nur Reakti    |        |                 | One-off: Create tar  | One-off, only respon |                  | Einmalig: Zielgruppe  | One-off: Create tar |
| 53             | Teilnahmeart (To-Do (TD))         | 4                | wiederholt, Selektio    |        |                 | Repeated: Create t   | Repeated, always e   |                  | Wiederholt: Zielgrup  | Repeated: Create t  |
| 54             | Status (Absence (A3))             | 5                | wiederholt, Selektio    |        |                 | Repeated: Create t   | Repeated, execute    |                  | Wiederholt: Selektio  | Repeated: Create t  |
| 55             | Status (To-Do (TD))               | 6                | wiederholt, Selektio    |        |                 | Repeated: Never ex   | Repeated, never ex   |                  | Wiederholt: Selektio  | Repeated: Never ex  |
| 56             | Typ (Meldung (MD))                | 7                | wiederholt, nur Real    |        |                 | Repeated: Create t   | Repeated, only resp  |                  | Wiederholt: Zielgrup  | Repeated: Create t  |
| 57             | Position Tag (Monat) (Wiederholu  | 8                | wiederholt, Pakete      |        |                 | Repeated: Send in p  | Repeated, package    |                  | Wiederholt: In Paket  | Repeated: Send in p |
| 58             | Art (Aufgabe (A1))                | 9                | wiederholt, Selektio    |        |                 | Repeated: Extend t   | Repeated, extend s   |                  | Wiederholt: Zielgrup  | Repeated: Extend t  |

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))

| Nr. | Text                              | Code | Origineleinstellung | Symbol | Referenz (Text) | Spe Sprachunabhängig | Spe 0001 TE_Base | Spe 0002 TE_Docu | Spe 0100 TE_German | Spe 0101 TE_English |
|-----|-----------------------------------|------|---------------------|--------|-----------------|----------------------|------------------|------------------|--------------------|---------------------|
| 55  | Status (To-Do (TD))               | 0    | offen               |        |                 | offen                | Open             |                  | Offen              | Open                |
| 56  | Typ (Meldung (MD))                | 1    | anzeigen            |        |                 | anzeigen             | Show             |                  | Anzeigen           | Show                |
| 57  | Position Tag (Monat) (Wiederholu  | 2    | erledigt            |        |                 | erledigt             | Completed        |                  | Erledigt           | Completed           |
| 58  | Art (Aufgabe (A1))                | 3    | versäumt            |        |                 | versäumt             | Missed           |                  | Versäumt           | Missed              |
| 59  | Bevorzugter Kanal (Person in Firr | 4    | in Bearbeitung      |        |                 | in Bearbeitung       | In Progress      |                  | In Bearbeitung     | In Progress         |
| 60  | Basis (Durchführung (Marketing-A  | 5    | Abgebrochen         |        |                 | Abgebrochen          | Aborted          |                  | Abgebrochen        | Cancelled           |

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

| Nr. | Text                             | Code | Origineleinstellung | Symbol | Referenz (Text) | Spe Sprachunabhängig | Spe 0001 TE_Base | Spe 0002 TE_Docu | Spe 0100 TE_German | Spe 0101 TE_English |
|-----|----------------------------------|------|---------------------|--------|-----------------|----------------------|------------------|------------------|--------------------|---------------------|
| 60  | Basis (Durchführung (Marketing-A | 0    | Selektion           |        |                 | Selektion            | Selection        |                  | Selektion          | Selection           |
| 61  | Typ (Abfrageergebnis (Q1))       | 1    | Globale Abfrage     |        |                 | Globale Abfrage      | Global query     |                  | Globale Abfrage    | Global Query        |
| 62  | Typ (Konfiguration (MC))         | 2    | Private Abfrage     |        |                 | Private Abfrage      | Private query    |                  | Private Abfrage    | Private Query       |

- Variable Kataloge

### 372 Kamp.-Typ. (Marketing-Aktivität)

| 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

| 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.)

| 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]: Nachverfi 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      |

| Katalog                                                                                  |                |                  |                |                    |                |                     |
|------------------------------------------------------------------------------------------|----------------|------------------|----------------|--------------------|----------------|---------------------|
| Reaktion (Marketing-Aktivität) [Marketing-Aktivität[Mandantennr.:9000]: Veransta] Anz. 2 |                |                  |                |                    |                |                     |
| Mandant                                                                                  | Ext. Schlüssel | Spe 0001 TE_Base | Ext. Schlüssel | Spe 0100 TE_German | Ext. Schlüssel | Spe 0101 TE_English |
| 9000                                                                                     | 10000_S2_10_1  | Attended         |                | Teilgenommen       |                | Attended            |
| 9000                                                                                     | 10000_S2_10_2  | Did Not Attend   |                | Nicht teilgenommen |                | Did Not Attend      |

## 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\_CAMPAGN\_MGMT, AK-CM, AKNew, ID\_NET\_ACTIVITY, CMTree, SelectCampaignReturn, SelectTemplateCampaign, CopyCampaign, M\_Activity, M\_ActivityExecution, ID\_NET\_NEWCAMPAGN, MarketingActiviyExecution, ID\_NET\_CAMPAGNS, 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

Menu CORE\_ID\_NET\_DASHBOARD\_MARKETING [Base]

Save Delete

Text Marketing Dashboard

Configuration TE\_CORE

CRM Processes Start Page: Marketing (50002160)

Info Area

QuickLink Context

Image Marketing

Visible

Action ShowForm

History: 04.03.2013: Created (Reason: It is not possible to use the action template)

Description

Referenced by

- Menu ID\_NET\_CAMPAIGN\_MGMT
- Expand no reference
- SearchAndList no reference
- TreeView no reference
- Button no reference

Action for Menu CORE\_ID\_NET\_DASHBOARD\_MARKETING

Action Template ShowForm

Shows a Form

Pass arguments as an object

Input Arguments

CreateNewTab { "refresh": false, "reusedId": "COR..."

FormName CORE\_Startpage\_Marketing

Output Arguments

CreateNewTab: { "refresh": false, "reusedId": "CORE\_ID\_NET\_DASHBOARD\_MARKETING" }

Menu CORE\_ID\_NET\_CM\_Templates [Base]

Save Delete

Text Campaign Templates

Configuration TE\_CORE

CRM Processes Campaign Management (70000080)

Info Area CM

QuickLink Context

Image CORE\_CAT\_CAMPAIGNSTATUS\_5

Visible

Action Search

Description Application menu for calling a search and list that only displays campaigns of status "Template"

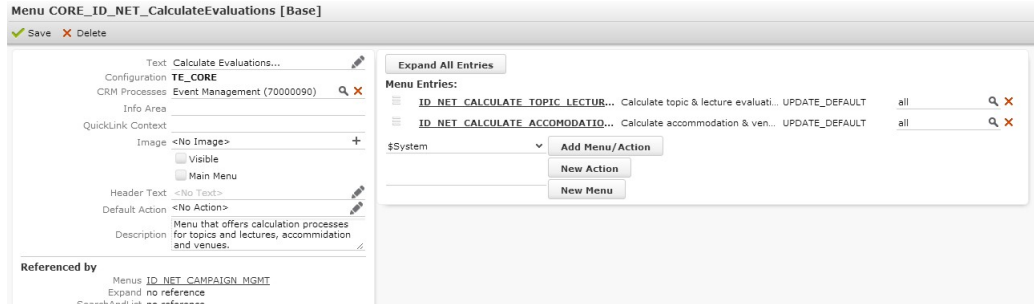
Referenced by

- Menu ID NET CAMPAIGN MGMT
- Expand no reference
- SearchAndList no reference
- TreeView no reference
- Button no reference



- **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.

Treeview 'CM' (Base) BB (Business to business) User: te\_isti Logout TE\_IST (1001) ->TE\_CORE (901),->UPDATE\_DEFAULT (0)

Startpage > All Info Areas > Info Area CM

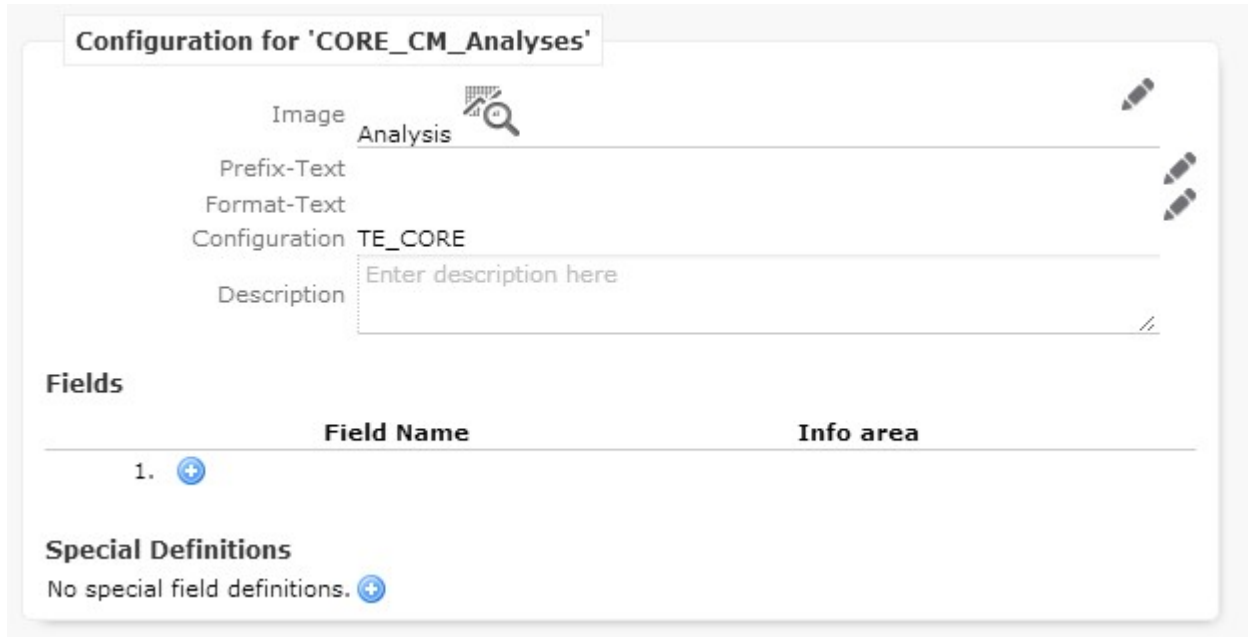
Configuration for 'CM'

Attribute-List -  
Description: Enter description here

| Nr. | Infoarea                               | Linkid  | Parent            | Filtername | RelationName | Flags | DisplayText | SortInfo | Displaymax | Record-Menu | Infoarea-Menu | Tablecaption | Expand-Name      | Search&List | ProcessId | Record-Control | InfoArea-Control | Record- |
|-----|----------------------------------------|---------|-------------------|------------|--------------|-------|-------------|----------|------------|-------------|---------------|--------------|------------------|-------------|-----------|----------------|------------------|---------|
| 0   | Campaign (CM)                          |         |                   |            |              |       |             |          | 1          |             | undefined     |              |                  |             |           |                |                  |         |
| 1   | Marketing (AK)                         | Default | 0: Campaign (CM)  |            |              | xr;ch |             |          | 5          |             |               | AK           | CORE_AK_CM       | AK-CM       |           |                |                  |         |
| 2   | Target Group (Marketing Activity) (AG) | Default | 1: Marketing (AK) |            |              | c;ch  |             |          | 100        |             |               |              |                  |             |           |                | Target...        | Q       |
| 3   | Activity (MA)                          | Default | 1: Marketing (AK) |            |              | c;ch  |             |          | 100        |             |               |              | CORE_MA_AK       |             |           |                |                  |         |
| 4   | Mailing (BR)                           | Default | 1: Marketing (AK) |            |              | c;ch  |             |          | 100        |             |               |              | CORE_BR_AK       |             |           |                |                  |         |
| 5   | Work Order (AF)                        | Default | 1: Marketing (AK) |            |              | c;ch  |             |          | 100        |             |               |              | CORE_AF_AK       |             |           |                |                  |         |
| 6   | Attendee (V1)                          | Default | 0: Campaign (CM)  |            |              | c;ch  |             |          | 5          |             |               |              |                  |             |           |                | Atten...         | Q       |
| 7   | Agenda Item (V4)                       | Default | 0: Campaign (CM)  |            |              | c;ch  |             |          | 5          |             |               |              |                  |             |           |                | Agen...          | Q       |
| 8   | Equipment (V6)                         | Default | 0: Campaign (CM)  |            |              | ch    |             |          | 5          |             |               |              |                  |             |           |                | Equip...         | Q       |
| 9   | Campaign (CM)                          | Default | 0: Campaign (CM)  |            |              |       | Analyses    |          | 5          |             |               |              | CORE_CM_Analyses |             |           |                |                  |         |

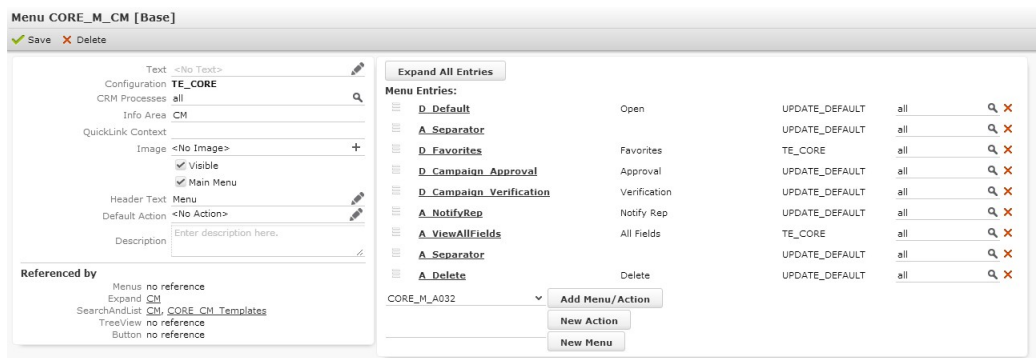
- **CORE\_CM\_Analyses Table Caption**

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**

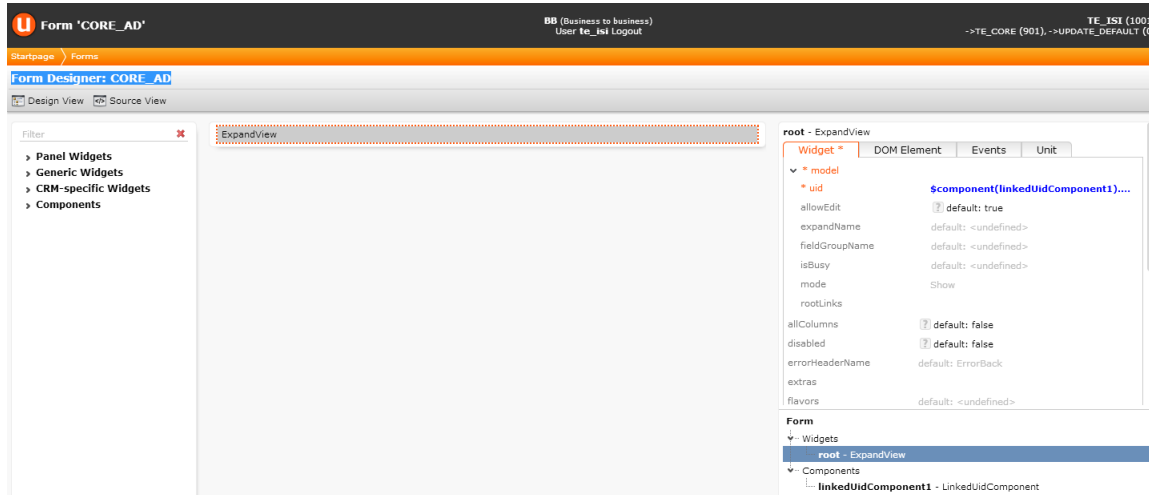
Used in the ExpandChildren header of the CM header group to offer NO new button for Response (AN) records in the sub-list of the Campaign (CM) mask.

- **CORE\_AK\_CM Field Group**

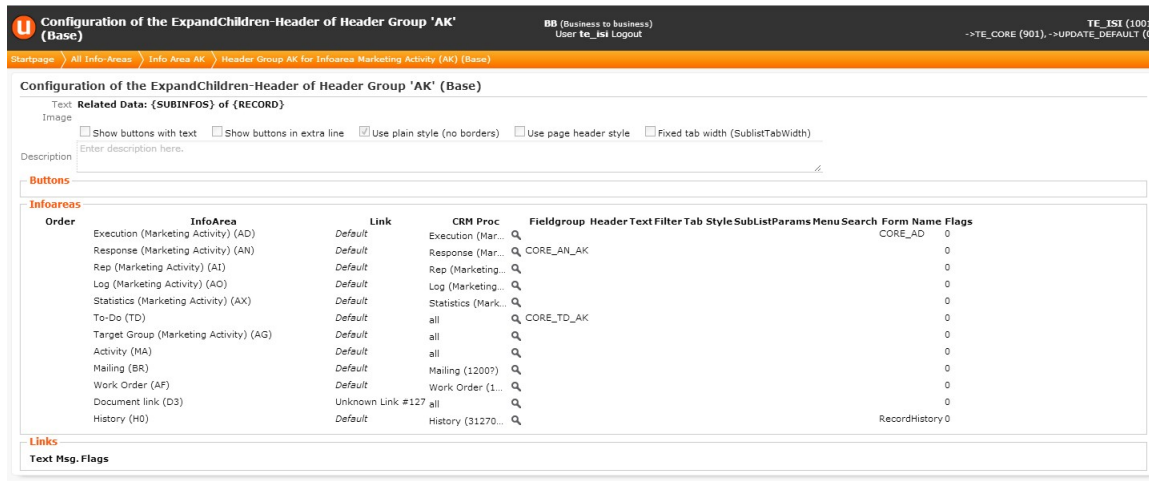
Defined elements: List, Search and MiniDetails. Used in the ExpandChildren header of the CM header group in order to display the sub-list of marketing activities (AK) records below a campaign.

- **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

**U** Configuration of the ExpandChildren-Header of Header Group 'AK-CM' (Base) BB (Business to business)  
User te\_hsi Logout

Startpage > All InfoAreas > Info Area AK > Header Group AK-CM for Infoarea Marketing Activity (AK) (Base)

**Configuration of the ExpandChildren-Header of Header Group 'AK-CM' (Base)**

Text: **Related Data: {SUBINFOS} of {RECORD}**

Image:  Show buttons with text  Show buttons in extra line  Use plain style (no borders)  Use page header style  Fixed tab width (SublistTabWidth)

Description: Enter description here.

**Buttons**

**Infoareas**

| Order | InfoArea                             | Link                        | CRM Proc | Fieldgroup | HeaderText | Filter | Tab Style | SubListParams | Menu Search | Form Name     | Flags |
|-------|--------------------------------------|-----------------------------|----------|------------|------------|--------|-----------|---------------|-------------|---------------|-------|
|       | Execution (Marketing Activity) (AD)  | Default Execution (Mar...   | Q        |            |            |        |           |               |             | CORE_AD       | 0     |
|       | Response (Marketing Activity) (AN)   | Default Response (Mar...    | Q        | CORE_AN_AK |            |        |           |               |             |               | 0     |
|       | Rep (Marketing Activity) (AI)        | Default Rep (Marketing...   | Q        |            |            |        |           |               |             |               | 0     |
|       | Log (Marketing Activity) (AO)        | Default Log (Marketing...   | Q        |            |            |        |           |               |             |               | 0     |
|       | Statistics (Marketing Activity) (AX) | Default Statistics (Mark... | Q        |            |            |        |           |               |             |               | 0     |
|       | To-Do (TD)                           | Default all                 | Q        | CORE_TD_AK |            |        |           |               |             |               | 0     |
|       | Document link (D3)                   | Default all                 | Q        |            |            |        |           |               |             |               | 0     |
|       | History (H0)                         | Default History (31270...   | Q        |            |            |        |           |               |             | RecordHistory | 0     |

**Links**

Text Msg. Flags

- **Field Groups**

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

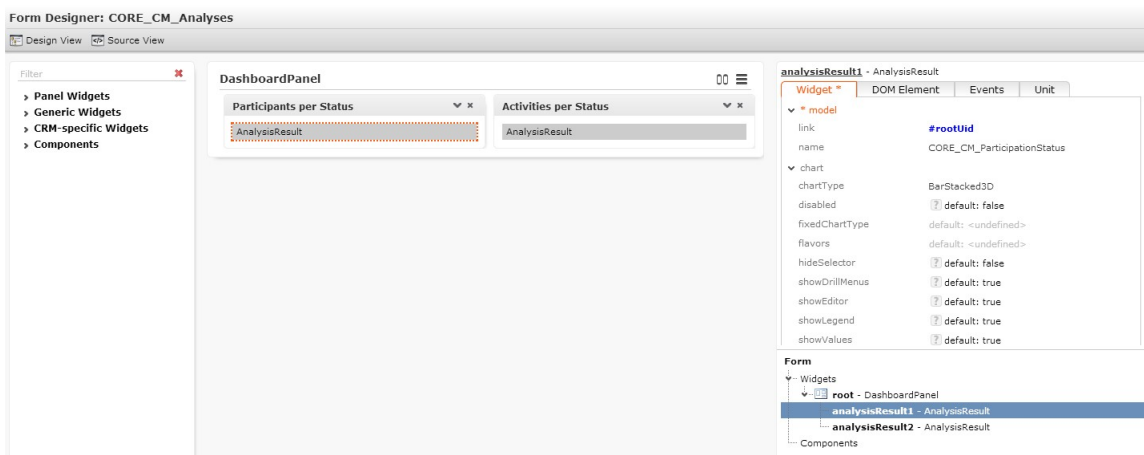
TE\_MA\_Email, TE\_MA\_EmailSent, TE\_MA\_Fax, TE\_MA\_Info, TE\_MA\_Internet, TE\_MA\_Letter, TE\_MA\_Telephone, TE\_MA\_Telephone\_Completed, TE\_MA\_Visit, TE\_MA\_Visit\_Completed Field Groups



| Internal Participants & Content | Marketing Activity | Duration & Costs                 | Linked Elements |
|---------------------------------|--------------------|----------------------------------|-----------------|
| Campaign My Event               |                    | Response 1 (Marke... No response | + ▼             |
| Marketing Activity Invitation   |                    | Response 2 (Marke...             | + ▼             |
| Marketing Activity Invitation   |                    | Response 3 (Marke...             | + ▼             |
|                                 |                    | Response 4 (Marke...             | + ▼             |
|                                 |                    | Response 5 (Marke...             | + ▼             |

## Form CORE\_CM\_Analyses

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



- **CORE\_CM Query**

**Query 'CORE\_CM' (Base)** BB (Business to business)  
User te\_isi Logout

Startpage > Queries

**Configuration for Query 'CORE\_CM' (Base)**

New-Date: 14.01.2013 10:20:09  
 Upd-Date: 12.02.2013 14:57:53

Readonly  
 Invisible in lists (within the application)

Hints:  default  enabled  disabled

CRM Processes: Campaign Management (700...

Description: Main query for campaign analysis page (Campaign tree)

---

**Campaign (CM)**

Fields: Name, Type, Responsible, Responsible (Name), Starts on, Ends on, Status, Language, Costs: Entire event, Costs: Entire event (2C), Currency

Sort:

Filter:

**PLUS Attendee (V1)maxrec=0**

Fields: Type, Registration, Invited on, Registered on, Confirmed on, Canceled on, Participation status, Company, Person

Sort:

Filter:

**WITH Marketing Activity (AK)maxrec=0**

Fields:

Sort:

Filter:

**PLUS Activity (MA)maxrec=0**

Fields: Marketing Activity, Result, Rep (Name), Rep, Starts on, Status, Typ, Response 1 (Marketing Act.), Company, Person

Sort:

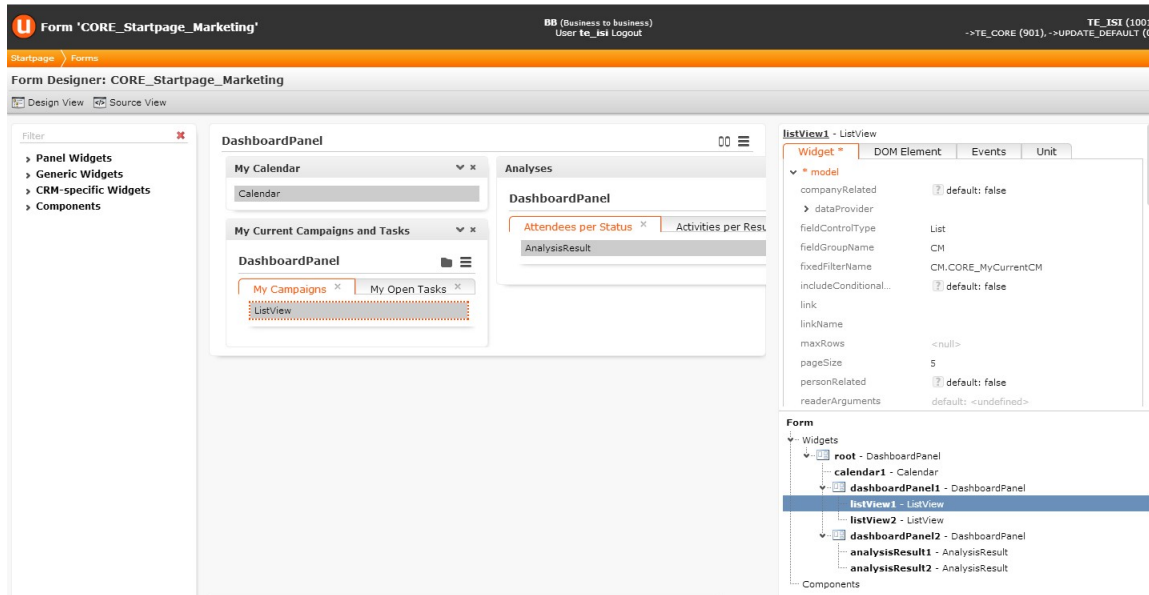
Filter:

- **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          | <input type="checkbox"/>            |   |
| showSidebar         | <input checked="" type="checkbox"/> |   |
| + 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.

| Nr | Infoarea                  | LinkId  | Parent                | Filtername | RelationName | Flags | DisplayText | SortInfo | Displaymax | Record-Menu | Infoarea-Menu  | Tablecaption | Expand-Name | Search&List | ProcessId | Record-Control |
|----|---------------------------|---------|-----------------------|------------|--------------|-------|-------------|----------|------------|-------------|----------------|--------------|-------------|-------------|-----------|----------------|
| 0  | Company (FI)              | -       |                       |            |              |       |             |          | 1          |             | FI             | FI Tree      |             |             |           |                |
| 1  | Person (KP)               | Default | 0:Company (FI)        |            | c:ch         |       | 2,58        | 15       |            |             | KP             | KP Tree      | TE_KP_FI    | Custo...    |           |                |
| 2  | Activity (MA)             | Default | 1:Person (KP)         |            | c:ch         |       | 12,0        | 15       |            |             | TE_MA_KP Tree  | MA Tree      | TE_MA_KP    | Custo...    |           |                |
| 3  | Mailing (BR)              | Default | 1:Person (KP)         |            | c:ch         |       |             | 5        |            |             |                |              |             | CORE_BR_KP  | Mailin... |                |
| 4  | Work Order (AF)           | Default | 1:Person (KP)         |            | c:ch         |       |             | 5        |            |             |                |              |             | CORE_AF_KP  | Work...   |                |
| 5  | Interest (IT)             | Default | 1:Person (KP)         |            | c:ch         |       | 0,1         | 5        |            |             | IT             | IT           | IT          | Inter...    |           |                |
| 6  | Relationship (PB)         | Default | 1:Person (KP)         |            | c:ch         |       | 4,5         | 5        |            |             | PB             | PB           | PB          | Relati...   |           |                |
| 7  | OP Part. Parties (Y2)     | Default | 1:Person (KP)         |            | c:ch         |       | 6           | 15       |            |             | TE_Y2_KP Tree  | Y2 Tree      | TE_Y2_FI    | Oppo...     |           |                |
| 8  | Property Participant (OB) | Default | 1:Person (KP)         |            | c:ch         |       |             | 15       |            |             | TE_OB_FITree   | OB Tree      | OB-KP       | Prope...    |           |                |
| 9  | Offer (PR)                | Default | 1:Person (KP)         |            | c:ch         |       | 5027        | 15       |            |             |                | PRTree       | PR-FI       | Offer...    |           |                |
| 10 | Document link (D3)        | Link    | 1:Person (KP)         | #127       | c:ch;hr      |       |             | 15       |            |             |                | D3Tree       | D3          | D3          |           |                |
| 11 | Documents (D1)            | Default | 10:Document link (D3) |            | c:ch;h       |       | 14010,6     | 15       |            |             | M_TreeChildren |              | D1          | D1          |           |                |
| 12 | Attendee (V1)             | Default | 1:Person (KP)         |            | c:ch         |       |             | 15       |            |             |                |              | CORE_V1_KP  | CORE_V1_KP  | Event...  |                |
| 13 | Lecture/Speaker (V3)      | Default | 1:Person (KP)         |            | c:ch         |       |             | 5        |            |             |                |              | CORE_V3_KP  | CORE_V3_KP  | Event...  |                |
| 14 | Activity (MA)             | Default | 0:Company (FI)        |            | c:ch;dt      |       | 12,0        | 15       |            |             | TE_MA_FITree   | MA Tree      | TE_MA_FI    | Activi...   |           |                |
| 15 | Mailing (BR)              | Default | 0:Company (FI)        |            | c:ch;dt      |       |             | 5        |            |             |                |              |             | CORE_BR_FI  | Mailin... |                |
| 16 | Work Order (AF)           | Default | 0:Company (FI)        |            | c:ch;dt      |       |             | 5        |            |             |                |              |             | CORE_AF_FI  | Work...   |                |

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.

|                                      |                    |
|--------------------------------------|--------------------|
| 1.4.2.1.1.17. Add Company            |                    |
| 1.4.2.1.1.18. Add Person to Activity |                    |
| 1.4.2.1.2. Letters                   |                    |
| 1.4.2.1.2.1. Mailing                 |                    |
| 1.4.2.1.3. Surveys                   | Deny (overridable) |
| 1.4.2.1.3.1. Survey                  |                    |

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.

|                              |       |
|------------------------------|-------|
| 1.4.3.1.1. Assign Tasks      |       |
| 1.4.3.1.2. Project Structure |       |
| 1.4.3.1.3. Task Tracking     |       |
| 1.4.3.1.100. Work Order      | Allow |
| 1.4.3.1.103. Task            |       |

- AK.CORE\_NoTemplate Filter

**U Filter 'AK.CORE\_NoTemplate' (Base)**

Startpage > Filter

**Configuration for Filter 'AK.CORE\_NoTemplate' (Base)**

Display-Text: No Templates  
New-Date: 15.01.2013 11:03:58  
Upd-Date: 15.01.2013 10:07:57

Readonly  
 Invisible in lists (within the application)

Description: (Status <> Template)

| Marketing Activity (AK)  |             |
|--------------------------|-------------|
| Filter: <b>Status</b> <> | Vorlage     |
|                          | CatCode = 5 |

- AK.CORE\_Template Filter

**U Filter 'AK.CORE\_Template' (Base)**

Startpage > Filter

**Configuration for Filter 'AK.CORE\_Template' (Base)**

Display-Text: Templates Only  
New-Date: 15.01.2013 11:06:24  
Upd-Date: 15.01.2013 10:07:29

Readonly  
 Invisible in lists (within the application)

Description: (Status == Template)

| Marketing Activity (AK) |             |
|-------------------------|-------------|
| Filter: <b>Status</b> = | Vorlage     |
|                         | CatCode = 5 |

- **CM.CORE\_MyCurrentCM Filter**

U Filter 'CM.CORE\_MyCurrentCM' (Base)

Startpage > Filter

**Configuration for Filter 'CM.CORE\_MyCurrentCM' (Base)**

Display-Text: My Current Campaigns  
 New-Date: **12.02.2013 09:46:24**  
 Upd-Date: **14.02.2013 15:45:42**

Readonly  
 Invisible in lists (within the application)

Description: (Responsible == current Rep AND Ends on >= current day)

---

**Campaign (CM)**

Filter: **AND**

- + X **Responsible** = \$curRep X ( ) + Parameter +
- + X **Ends on** >= \$curDay X ( ) + Parameter +

- **CM.CORE\_NoTemplate Filter**

U Filter 'CM.CORE\_NoTemplate' (Base)

Startpage > Filter

**Configuration for Filter 'CM.CORE\_NoTemplate' (Base)**

Display-Text: No Templates  
 New-Date: **08.01.2013 14:48:18**  
 Upd-Date: **14.02.2013 15:46:33**

Readonly  
 Invisible in lists (within the application)

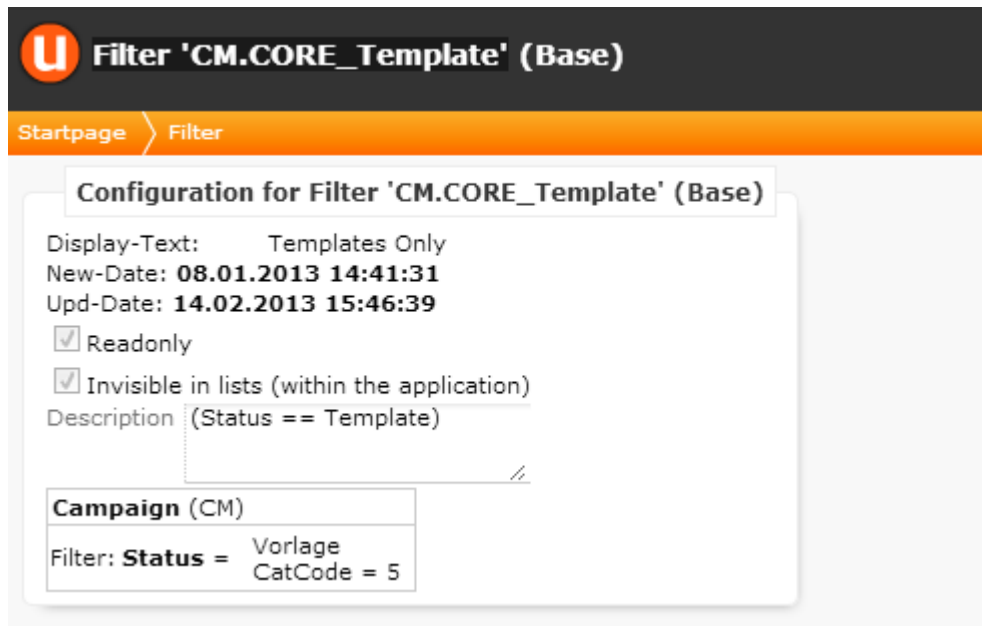
Description: (Status <> Template)

---

**Campaign (CM)**

Filter: **Status** <> Vorlage  
 CatCode = 5

- **CM.CORE\_Template Filter**



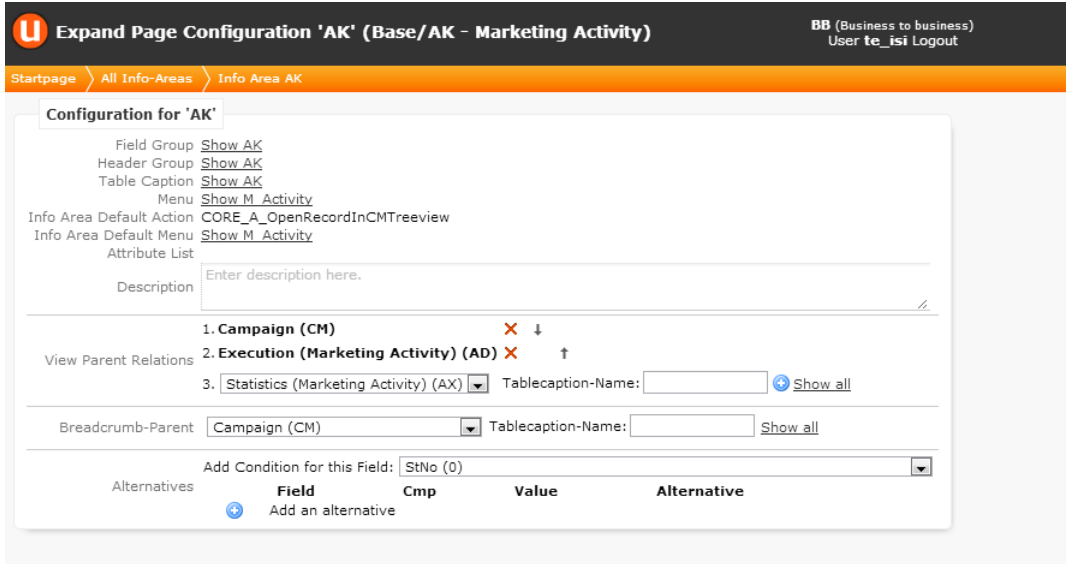
- **Find-as-you-type functionality**

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

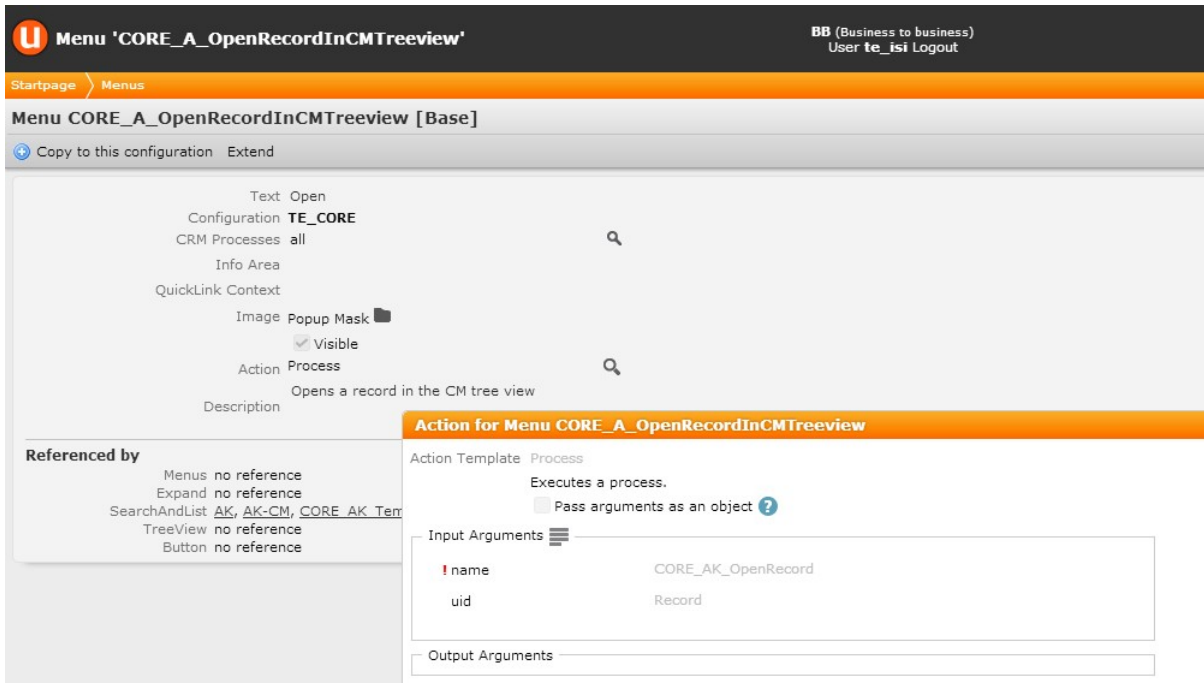
Queries AK.FindAsYouType, CM.FindAsYouType, F1.FindAsYouType, FI.FindAsYouType, KP.FindAsYouType, MA.FindAsYouType, V1.FindAsYouType, V2.FindAsYouType, V4.FindAsYouType

- **AK Expand Page**

Defines that the default action for the info area is CORE\_A\_OpenRecordInCMTreeview. 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

Process 'CORE\_AK\_OpenRecord'

CRM Process Campaign Management (70000080)

Description Process to open a Marketing Activity Record in the CM Tree or in Expand View if no Campaign is linked

Initial Step CORE\_AK\_OpenRecord\_Dispatching

**Process Phases**

**Data Providers**

| Name             | Action                 |
|------------------|------------------------|
| Input Message    |                        |
| Process Storage  |                        |
| ReadRecordValues | ReadRecordDataProvider |

**Process Storage Variables**

| Name      | Data Provider    | Value                    |
|-----------|------------------|--------------------------|
| CM_StatNo | ReadRecordValues | \$.get("CampaignStatNo") |
| CM_SeqNo  | ReadRecordValues | \$.get("CampaignSeqNo")  |
| AKuid     | Input Message    | \$.get("uid")            |

**Process Metrics**

| View | Data Provider | Value | Help Text |
|------|---------------|-------|-----------|
|------|---------------|-------|-----------|

**Action for DataProvider**

Action Template [ReadRecordDataProvider](#)

Data provider that reads a single record from the CRM database. Result type: u8.Crm.BusinessObject

Pass arguments as an object

**Input Arguments**

| Source         | Value                        | Name      |
|----------------|------------------------------|-----------|
| Input Message  | \$.get("uid")                | uid / uid |
| Constant Value | CampaignStatNo,CampaignSeqNo | fields    |



- CORE\_AK\_OpenRecord\_Dispatching Step

The screenshot shows the configuration page for the 'CORE\_AK\_OpenRecord\_Dispatching' step. The interface includes a header with the step name, user information, and navigation links. Below the header, there are sections for 'Data Providers', 'Action', 'Validation', and 'Dispatching'. The 'Dispatching' section contains a table with columns for Source, Condition, Next Step, and Arguments.

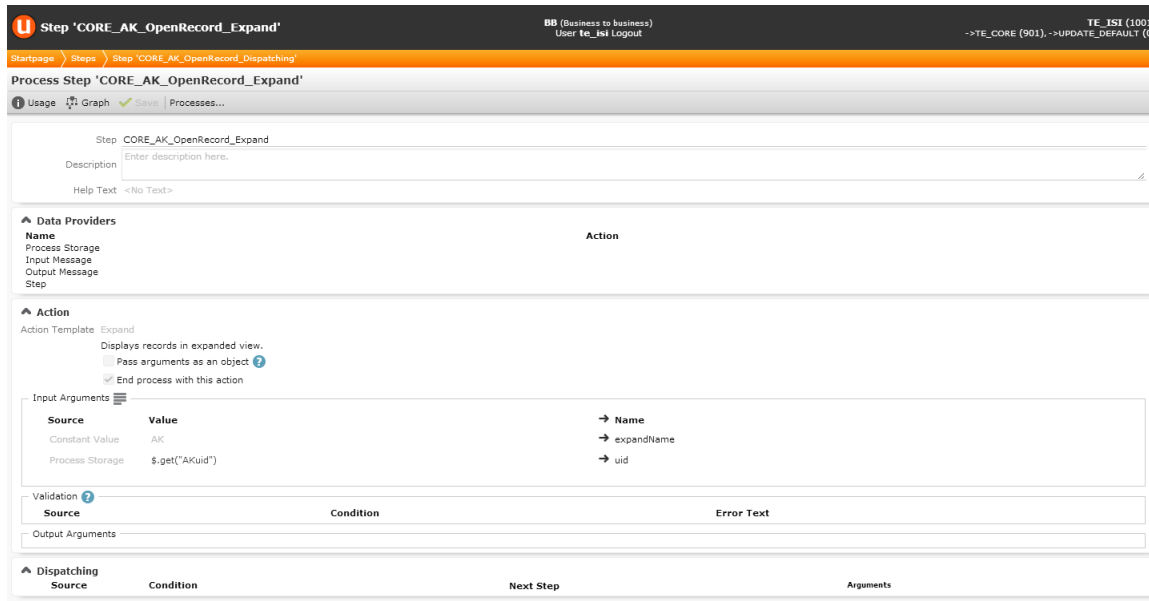
| Source          | Condition                                                                 | Next Step                 | Arguments |
|-----------------|---------------------------------------------------------------------------|---------------------------|-----------|
| Process Storage | <code>\$.get("CM_StaNo") != "" &amp;&amp; \$.get("CM_SerNo") != ""</code> | CORE_AK_OpenRecord_Tree   |           |
| Constant Value  | true                                                                      | CORE_AK_OpenRecord_Expand |           |

- CORE\_AK\_OpenRecord\_Tree Step

The screenshot shows the configuration page for the 'CORE\_AK\_OpenRecord\_Tree' step. The interface includes a header with the step name, user information, and navigation links. Below the header, there are sections for 'Data Providers', 'Action', 'Validation', and 'Dispatching'. The 'Action' section is expanded to show 'Tree' as the action template. The 'Dispatching' section contains a table with columns for Source, Condition, Next Step, and Arguments.

| Source          | Condition                    | Next Step    | Arguments |
|-----------------|------------------------------|--------------|-----------|
| Constant Value  | CM                           | treeViewName |           |
| Process Storage | <code>\$.get("AKuid")</code> | uid          |           |

- **CORE\_AK\_OpenRecord\_Expand Step**

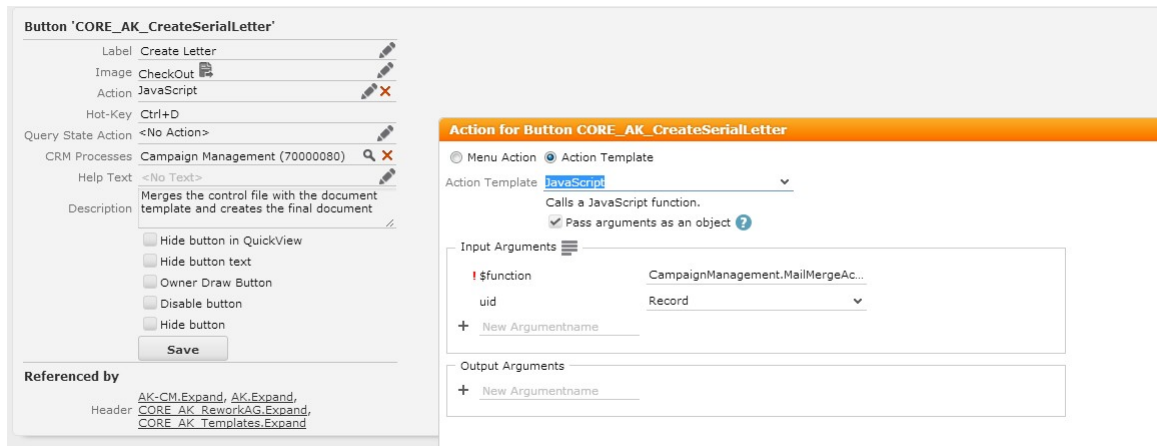


- **CORE\_TD\_AK Field Group**

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 UPDATE\_DEFAULT is used.

The screenshot shows the configuration interface for a button. On the left, the 'Button 'CORE\_AD\_CreateTargetGroup'' configuration is visible, including fields for Label, Image, Action, Hot-Key, Query State Action, CRM Processes, Help Text, and Description. On the right, the 'Action for Button CORE\_AD\_CreateTargetGroup' panel is active, showing 'Menu Action' selected and 'CORE\_A\_AD\_GenerateTargetGroup' chosen from a dropdown menu. A 'Save' button is located at the bottom of the configuration area.

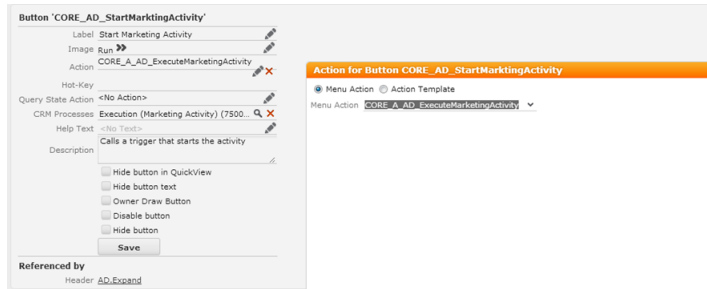
- **CORE\_A\_AD\_GenerateTargetGroup Menu**

**Attention:** This element does not exist in v3 or higher. A button from the UPDATE\_DEFAULT is used.

The screenshot displays the configuration for a menu item. The main configuration area includes fields for Text, Configuration, CRM Processes, Info Area, QuickLink, Context, Image, Visible, Action, and Trigger. The 'Action' field is set to 'Trigger' with the description 'Calls a trigger that creates the target group based on a query / selection.' On the right, the 'Action for Menu CORE\_A\_AD\_GenerateTargetGroup' panel is shown, with 'Trigger' selected as the Action Template. The 'Input Arguments' section shows 'I name' as 'CORE\_AD\_UPD\_GenerateTargetGro...' and 'uid' as 'Record'. A 'Save' button is at the top left of the configuration area.

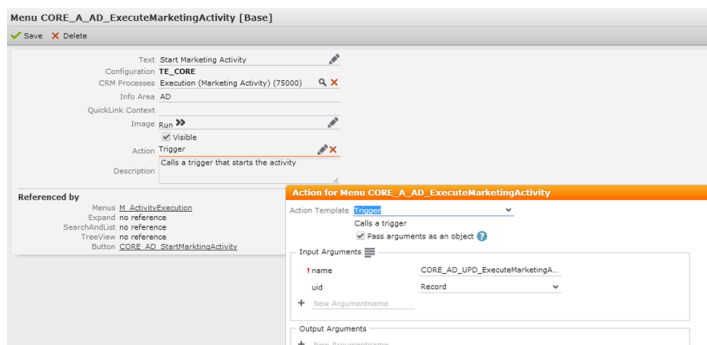
- **CORE\_AD\_StartMarketingActivity Button**

**Attention:** This element does not exist in v3 or higher. A button from the UPDATE\_DEFAULT is used.

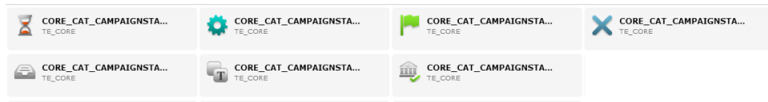


- **CORE\_A\_AD\_ExecuteMarketingActivity Button**

**Attention:** This element does not exist in v3 or higher. A button from the UPDATE\_DEFAULT is used.

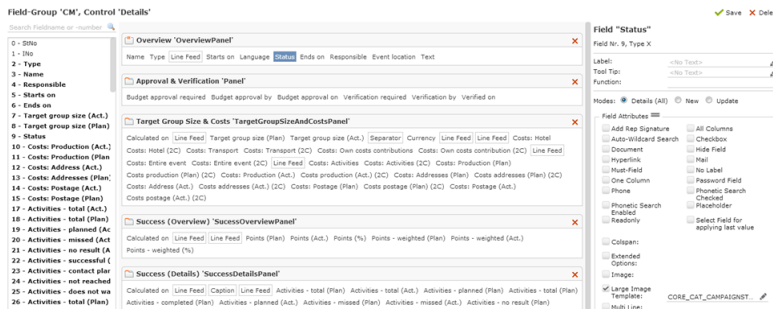


• CORE\_CAT\_CAMPAIGNSTATUS\_0-CORE\_CAT\_CAMPAIGNSTATUS\_6 Images



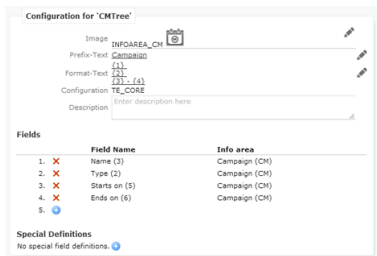
Files: u8-open.png, u8-progress.png, u8-completed.png, u8-missed.png, u8-archive.png, u8-template.png, u8-budget-approval.png.

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



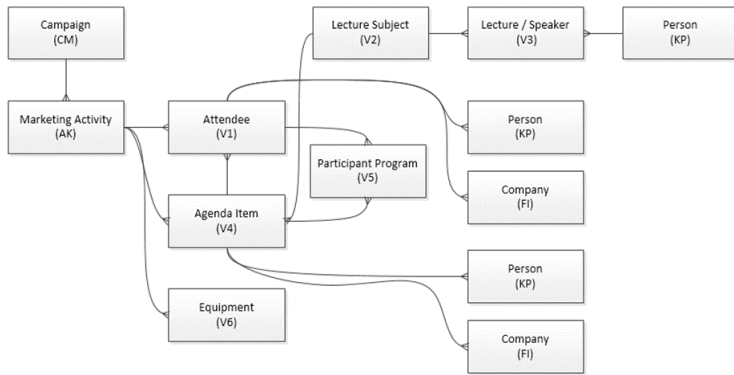
• Caption CMTree Table

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.

| Info Area                | Deny Access | Deny New | Deny Update | Deny Deletion | Condit. Access | Condit. New | Condit. Update | Condit. Delete | Implicit Hierarch | Create Default | Fields | Cond. Fields | Triggers | Workflow | Log - Read | Log - Write | History | Mark as deleted | Addition settings |
|--------------------------|-------------|----------|-------------|---------------|----------------|-------------|----------------|----------------|-------------------|----------------|--------|--------------|----------|----------|------------|-------------|---------|-----------------|-------------------|
| Attendee (V1)            |             | ✓        | ✓           | ✓             |                |             |                |                |                   |                |        |              |          |          |            |             | ✓       |                 |                   |
| Participant Program (V5) |             | ✓        | ✓           | ✓             |                |             |                |                |                   |                |        |              |          |          |            |             | ✓       |                 |                   |

### 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.

| Info Area            | Deny Access | Deny New | Deny Update | Deny Deletion | Condit. Access | Condit. New | Condit. Update | Condit. Delete | Implicit Hierarch | Create Default | Fields | Cond. Fields | Triggers | Workflow | Log - Read | Log - Write | History | Mark as deleted | Addition settings |
|----------------------|-------------|----------|-------------|---------------|----------------|-------------|----------------|----------------|-------------------|----------------|--------|--------------|----------|----------|------------|-------------|---------|-----------------|-------------------|
| Lecture Subject (V2) |             | ✓        | ✓           | ✓             |                |             |                |                |                   |                |        |              |          |          |            |             |         | ✓               |                   |
| Agenda Item (V4)     |             | ✓        | ✓           | ✓             |                |             |                |                |                   |                |        |              |          |          |            |             |         | ✓               |                   |

### 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.

| Info Area            | Deny Access | Deny New | Deny Update | Deny Deletion | Condit. Access | Condit. New | Condit. Update | Condit. Delete | Implicit Hierarchy | Create Default | Fields | Cond. Fields | Triggers | Workflow | Log - Read | Log - Write | History | Mark as deleted | Additional settings |
|----------------------|-------------|----------|-------------|---------------|----------------|-------------|----------------|----------------|--------------------|----------------|--------|--------------|----------|----------|------------|-------------|---------|-----------------|---------------------|
| Lecture Subject (V2) | ✓           | ✓        | ✓           | ✓             |                |             |                |                |                    |                |        |              |          |          |            |             | ✓       |                 |                     |

### 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.

| Info Area        | Deny Access | Deny New | Deny Update | Deny Deletion | Condit. Access | Condit. New | Condit. Update | Condit. Delete | Implicit Hierarchy | Create Default | Fields | Cond. Fields | Triggers | Workflow | Log - Read | Log - Write | History | Mark as deleted | Additional settings |
|------------------|-------------|----------|-------------|---------------|----------------|-------------|----------------|----------------|--------------------|----------------|--------|--------------|----------|----------|------------|-------------|---------|-----------------|---------------------|
| Agenda Item (V4) | ✓           | ✓        | ✓           |               |                |             |                |                |                    |                |        |              |          |          |            |             | ✓       |                 |                     |

### 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.

| Info Area                | Deny Access | Deny New | Deny Update | Deny Deletion | Condit. Access | Condit. New | Condit. Update | Condit. Delete | Implicit Hierarchy | Create Default | Fields | Cond. Fields | Triggers | Workflow | Log - Read | Log - Write | History | Mark as deleted | Additional settings |
|--------------------------|-------------|----------|-------------|---------------|----------------|-------------|----------------|----------------|--------------------|----------------|--------|--------------|----------|----------|------------|-------------|---------|-----------------|---------------------|
| Participant Program (V5) | ✓           | ✓        | ✓           |               |                |             |                |                |                    |                |        |              |          |          |            |             | ✓       |                 |                     |

### 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.

| Info Area      | Deny Access | Deny New | Deny Update | Deny Deletion | Condit. Access | Condit. New | Condit. Update | Condit. Delete | Implicit Hierarchy | Create Default | Fields | Cond. Fields | Triggers | Workflow | Log - Read | Log - Write | History | Mark as deleted | Additional settings |
|----------------|-------------|----------|-------------|---------------|----------------|-------------|----------------|----------------|--------------------|----------------|--------|--------------|----------|----------|------------|-------------|---------|-----------------|---------------------|
| Equipment (V6) | ✓           | ✓        | ✓           |               |                |             |                |                |                    |                |        |              |          |          |            |             | ✓       |                 |                     |

# Campaign Templates

Learn about the defined campaign template.

The following campaign templates are defined:

## Template: Event (StNo: 10000 INo: 7) Marketing Activity & Execution “Invitation”

The screenshot shows the configuration for a Marketing Activity named "Invitation".

- Activity Details:**
  - Name: Marketing Activity Invitation
  - Channel: Letter
  - Status: Template
  - Starts on: 01.01.2000
  - Ends on: 10.01.2000
  - Level: 10
  - Event Location: Text
- Parent Data | Related Data:**
  - Execution type: One-off: Create target group based on query
  - Base: Global Query
  - Target group defin... (partial)
  - Query right of: Marketing activity... Activity\_Letter
  - Query right of (Na... (partial)
  - Executing rep (partial)
  - Execution status (partial)
- Activity Configuration:**
  - Letter: Template - COSE\_English\_Invitation.doc
  - Letter: Control File
  - Save letters:
- Activity Default Values:**
  - Activity default val... Letter Invitation
  - Create activities for: 10.01.2000
  - Activity type: Letter
  - Priority: High
  - Unit costs (partial)
  - Questionnaire (partial)
  - Survey on (partial)

## Marketing Activity & Execution “Follow-Up”

The screenshot shows the configuration for a Marketing Activity named "Follow-up".

- Activity Details:**
  - Name: Marketing Activity Follow-up
  - Channel: Telephone
  - Status: Template
  - Starts on: 01.02.2000
  - Ends on: 24.03.2000
  - Level: 20
  - Event Location: Text
- Parent Data | Related Data:**
  - Execution type: One-off: Create target group based on response / new entry
  - Base: Selection
  - Target group defin... (partial)
  - Query right of: Marketing activity... Activity\_Tel
  - Query right of (Na... (partial)
  - Executing rep (partial)
  - Execution status (partial)
- Activity Configuration:**
  - Letter: Template - COSE\_English\_Invitation.doc
  - Letter: Control File
  - Save letters:
- Activity Default Values:**
  - Activity default val... Telephone Follow-up
  - Create activities for: 10.01.2000
  - Activity type: Telephone
  - Priority: High
  - Unit costs (partial)
  - Questionnaire (partial)
  - Survey on (partial)

## Marketing Activity & Execution “Confirmation”



**Marketing Activity Confirmation**

Marketing Activity Confirmation  
Starts on 15.01.2000  
Ends on 24.03.2000  
Text

Channel E-Mail  
Currency Responsible  
Status Template Level 30  
Event Location

**Parent Data | Related Data**

Execution Repeated: Create target group based on responses

Base Selection Target group defin...  
Query right of Query right of (Ita...  
Executing rep

Marketing activity ... Activity\_E-Mail  
Execution type Repeated: Create target group based on responses Execution status

Letter E-mail Fax SMS Activities Mailing WorkOrder Milestones Repeated

mail: Template Doc... COBE\_Confirmation\_E-Mail.html  
E-mail: Control File  
Subject Confirmation  
E-mail from mona.market@mycompany.com  
E-mail: Send as HTML  
Attachment 1 Attachment 2 Attachment 3  
E-mail: not personal... E-mail Priority High  
E-mail address order  
Send questionnaire Questionnaire  
Web server address

Letter E-mail Fax SMS Activities Mailing WorkOrder Milestones Repeated

Activity default val... E-Mail Confirmation

Create activities for  
Unit costs Activity type E-mail Priority High  
Questionnaire Survey on

## Marketing Activity & Execution “Event”

**Marketing Activity Event**

Marketing Activity Event  
Starts on 25.03.2000  
Ends on 25.03.2000  
Text

Channel Personal  
Currency Responsible  
Status Template Level 40  
Event Location

**Parent Data | Related Data**

Execution Repeated: Create target group based on responses

Base Selection Target group defin...  
Query right of Query right of (Na...  
Executing rep

Marketing activity ... Activity  
Execution type Repeated: Create target group based on responses Execution status

Letter E-mail Fax SMS Activities Mailing WorkOrder Milestones Repeated

Activity default val... Event Event

Create activities for  
Unit costs Activity type Event Priority High  
Questionnaire Survey on

## Vorlage: Veranstaltung (StNo: 1000 INo: 10)

**Kampagne Vorlage: Veranstaltung**

Vorstellung 01.01.2000 - 30.03.2000

Vantwortlich Wahrung Sprache Deutsch Status Vorlage

**Kampagne Vorlage: Veranstaltung**

Name Vorlage: Veranstaltung Typ Veranstaltung  
Beginnt am 01.01.2000 Verantwortlich Sprach Deutsch Status Vorlage  
Endet am 30.03.2000 Veranstaltung

Text: Kampagne für eine Veranstaltung: Einladung per Brief, telefonische Nachverfolgung, Bestätigung per E-Mail und die Veranstaltung selbst.

Freigabe & Prüfung Zielgruppengröße & Kosten Erfolg (Übersicht) Erfolg (Detail)

Budgetfreigabe er... Budgetfreigabe von Budgetfreigabe am  
Prüfung erforderlich Prüfung von Prüfung am

**Abhängige Daten**

Marketing-Aktivitäten Reaktionen Aufgaben Dokument-Links Historie

| Marketing Aktivität | Reaktion           | Folge-Markett... | An... | Anzahl... | Einzelpla... | Anmeldung | Teilnahme... | Ergebnis            |
|---------------------|--------------------|------------------|-------|-----------|--------------|-----------|--------------|---------------------|
| Bestätigung         | OK                 | Veranstaltung    | 50    |           |              |           |              |                     |
| Einladung           | Abgelehnt          |                  | 20    |           | 2            | Abmelden  |              | Möchte kennen...    |
| Einladung           | Angenommen         | Bestätigung      | 30    |           | 10           | Anmelden  |              | Aktiviert gesteu... |
| Einladung           | Keine Antwort      | Nachverfolgung   | 30    |           |              |           |              | Nicht erreicht      |
| Nachverfolgung      | Interesse          | Bestätigung      | 20    |           | 8            | Anmelden  |              | Aktivität geplant   |
| Nachverfolgung      | Kein Interesse     |                  | 20    |           | 1            | Abmelden  |              | Möchte kennen...    |
| Nachverfolgung      | Keine Antwort      | Nachverfolgung   | 10    |           |              |           |              | Nicht erreicht      |
| Veranstaltung       | Nicht teilgenommen |                  | 5     |           |              |           | Verzunkt     |                     |
| Veranstaltung       | Teilgenommen       |                  | 45    |           | 50           |           | Teilgenommen | Erfolgreich         |

## Marketing Activity & Execution “Einladung”

**Marketing-Aktivität Einladung**

Kopieren Berechnen Brief erstellen

Marketing-Aktivität: Einladung Kanal: Brief Status: Vorlage  
 Beginnt am: 01.01.2000 Währung: Stufe: 10  
 Endet am: 10.01.2000 Verantwortlich: Veranstaltungsort:  
 Text

**Übergeordnete Daten | Abhängige Daten**

Durchführung Reaktionen Bearbeiter Protokolle Statistiken To-Dos Dokument-Links Historie

**Durchführung Einmalig: Zielgruppe durch Abfrage erstellen**

Kopieren Zielgruppe erstellen Format erstellen / bearbeiten Marketing-Aktivität starten

Basis: Globale Abfrage Zielgruppendefiniert...  
 Abfragerecht von: Abfragerecht von... Ausführender Ben...  
 Marketing-Aktivitätsformat: Marketing-Activity\_Letter  
 Durchführungsart: Einmalig: Zielgruppe durch Abfrage erstellen Durchführungsstat...  
 Brief E-Mail Fax SMS Aktivitäten Mailing Arbeitsauftrag Meilensteine Wiederholt

Brief: Dokumentv... COSE\_German\_Invitation.doc  
 Brief: Steuerdatei  
 Briefe speichern

Brief E-Mail Fax SMS **Aktivitäten** Mailing Arbeitsauftrag Meilensteine Wiederholt

Aktivitäts- Brief Einladung  
 Vorgabewerte  
 Aktivitäten erstelle... 10.01.2000 Aktivitätstyp: Brief Priorität: Hoch  
 Einzelkosten Fragebogen Umfrage am

## Marketing Activity & Execution “Nachverfolgung”

**Marketing-Aktivität Nachverfolgung**

Kopieren Berechnen Brief erstellen

Marketing-Aktivität: Nachverfolgung Kanal: Telefon Status: Vorlage  
 Beginnt am: 01.02.2000 Währung: Stufe: 20  
 Endet am: 24.03.2000 Verantwortlich: Veranstaltungsort:  
 Text

**Übergeordnete Daten | Abhängige Daten**

Durchführung Reaktionen Bearbeiter Protokolle Statistiken To-Dos Dokument-Links Historie

**Durchführung Einmalig: Zielgruppe aufgrund von Reaktion / Neuzugang erstellen**

Kopieren Zielgruppe erstellen Format erstellen / bearbeiten Marketing-Aktivität starten

Basis: Selektion Zielgruppendefiniert...  
 Abfragerecht von: Abfragerecht von... Ausführender Ben...  
 Marketing-Aktivitätsformat: Marketing-Activity\_Tel  
 Durchführungsart: Einmalig: Zielgruppe aufgrund von Reaktion / Neuzugang erstellen Durchführungsstat...  
 Brief E-Mail Fax SMS **Aktivitäten** Mailing Arbeitsauftrag Meilensteine Wiederholt

Aktivitäts- Telefone Nachverfolgung  
 Vorgabewerte  
 Aktivitäten erstelle... 10.01.2000 Aktivitätstyp: Telefon Priorität: Hoch  
 Einzelkosten Fragebogen Umfrage am

## Marketing Activity & Execution “Bestätigung”

**Marketing-Aktivität Bestätigung**

Kopieren Berechnen Brief erstellen

Marketing-Aktivität: Bestätigung Kanal: E-Mail Status: Vorlage  
 Beginnt am: 15.01.2000 Währung: Stufe: 30  
 Endet am: 24.03.2000 Verantwortlich: Veranstaltungsort:  
 Text

**Übergeordnete Daten | Abhängige Daten**

Durchführung Reaktionen Bearbeiter Protokolle Statistiken To-Dos Dokument-Links Historie

**Durchführung Wiederholt: Zielgruppe aufgrund von Reaktion / Neuzugang erstellen**

Kopieren Zielgruppe erstellen Format erstellen / bearbeiten Marketing-Aktivität starten

Basis: Selektion Zielgruppendefiniert...  
 Abfragerecht von: Abfragerecht von... Ausführender Ben...  
 Marketing-Aktivitätsformat: Marketing-Activity\_E-Mail  
 Durchführungsart: Wiederholt: Zielgruppe aufgrund von Reaktion / Neuzugang erstellen Durchführungsstat...  
 Brief **E-Mail** Fax SMS Aktivitäten Mailing Arbeitsauftrag Meilensteine Wiederholt

Mail: Dokumentv... COSE\_Confirmation\_E-Mail.html  
 E-Mail: Steuerdatei  
 Betreff: Bestätigung  
 E-Mail von: monika.market@mycompany.com  
 E-Mail senden als HTML  
 Anlage 1 Anlage 2 Anlage 3  
 E-Mail: nicht person... E-Mail Priorität: Hoch  
 E-Mail Adressreihen...  
 Fragebogen senden Fragebogen  
 Webserver-Adresse

Brief E-Mail **Fax** SMS **Aktivitäten** Mailing Arbeitsauftrag Meilensteine Wiederholt

Aktivitäts- E-Mail Bestätigung  
 Vorgabewerte  
 Aktivitäten erstelle... 10.01.2000 Aktivitätstyp: E-Mail Priorität: Hoch  
 Einzelkosten Fragebogen Umfrage am

## Marketing Activity & Execution “Veranstaltung”

**Marketing-Aktivität Veranstaltung**

Kopieren Berechnen Brief erstellen

Marketing-Aktivität: Veranstaltung Kanal: Persönlich Status: Vorlage  
 Beginnt am: 25.03.2000 Währung: Währung Stufe: 40  
 Endet am: 25.03.2000 Verantwortlich: Verantwortlich Veranstaltungsort: Veranstaltungsort  
 Text

**Übergeordnete Daten | Abhängige Daten**

Durchführung Reaktionen Bearbeiter Protokolle Statistiken To-Dos Dokument-Links Historie

**Durchführung Wiederholt: Zielgruppe aufgrund von Reaktion / Neuzugang erstellen**

Kopieren Zielgruppe erstellen Format erstellen / bearbeiten... Marketing-Aktivität starten

Basis Selektion Zielgruppendefini... Abfragerecht von... Ausführender Ben...  
 Abfragerecht von: Marketing-Aktivität Zielgruppe erstellen  
 Aktivitätsformat: Aktivitätsformat  
 Durchführungsart: Wiederholt: Zielgruppe aufgrund von Reaktion / Neuzugang erstellen Durchführungsstat...  
 Brief E-Mail Fax SMS **Aktivitäten** Mailing Arbeitsauftrag Meilensteine Wiederholt  
 Aktivitäts-Vorname: Veranstaltung Veranstaltung  
 Aktivitäts-Vorgabewerte: Veranstaltung Veranstaltung  
 Aktivitäten erstelle... Aktivitätstyp: Veranstaltung  
 Einzelkosten: Fragebogen  
 Priorität: Hoch  
 Umfrage am:

# Catalogs

Learn about the variable catalog.

## Variable Catalogs

### 486 Teilnehmertyp

| Katalog                         |                |                  |                |                     |                |                     |
|---------------------------------|----------------|------------------|----------------|---------------------|----------------|---------------------|
| Teilnehmertyp (Teilnehmer) [48] |                |                  |                |                     |                |                     |
| 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] |                |                       |                |                     |                |                       |
| 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

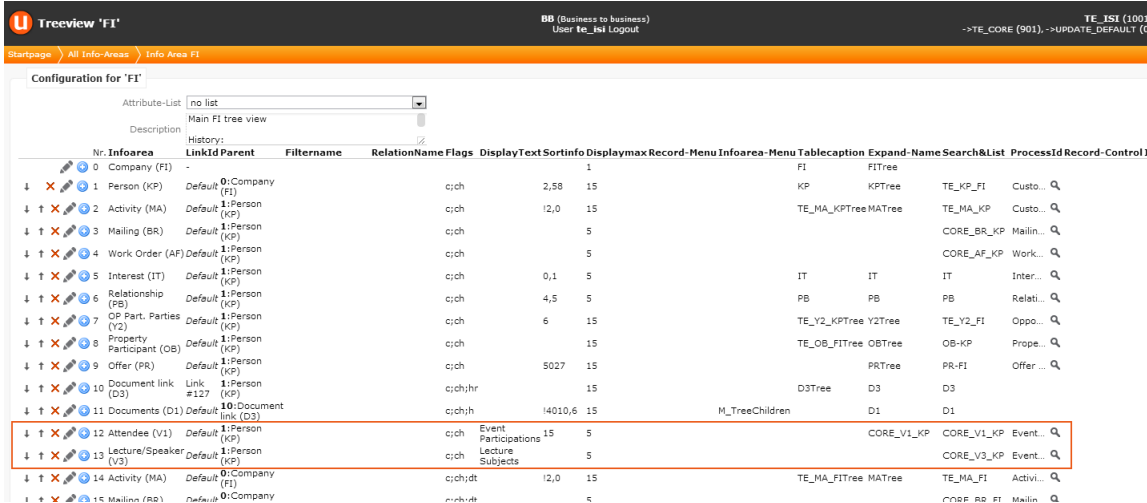
| Katalog                        |                |                  |                |                     |                |                     |
|--------------------------------|----------------|------------------|----------------|---------------------|----------------|---------------------|
| Ausstattung (Ausstattung) [49] |                |                  |                |                     |                |                     |
| 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.

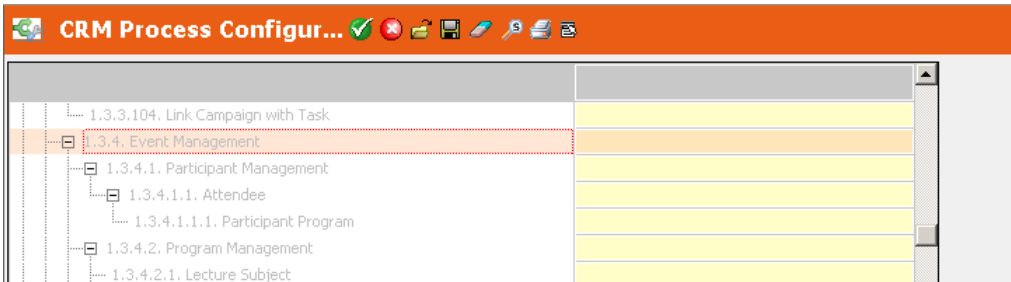
## Tree View FI

The following elements were included in the FI tree view.

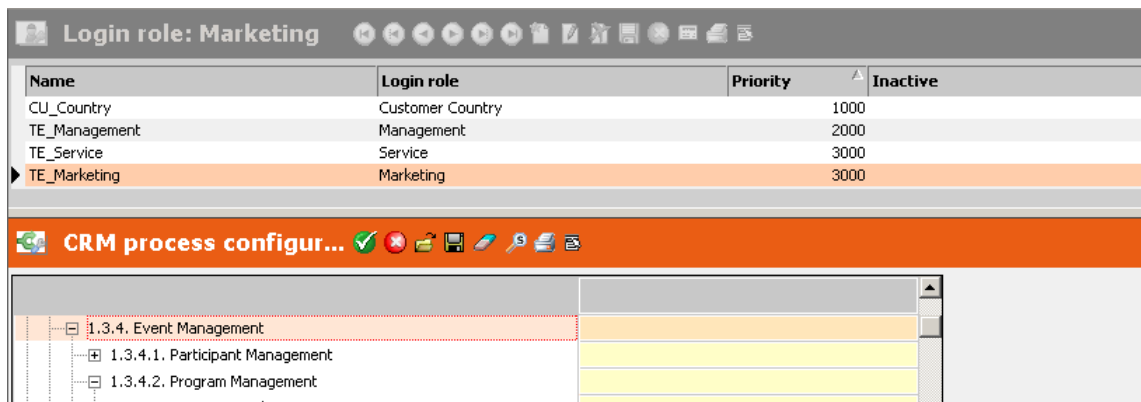


The Attendee (V1) node and the Lecture/Speaker (V3) should only be visible if the role of the current user has access to the CRM process “1.3.4. Event Management”:

- 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

The screenshot shows the configuration for the button 'CORE\_V5\_NewFromV1'. On the left, the 'Button' configuration panel includes fields for Label (New), Image (New-Button), Action (ExpandNew), Hot-Key, Query State Action (<No Action>), CRM Processes (Participant Program (243400\*)), Help Text (<No Text>), and a Description field. Below these are several checkboxes: Hide button in QuickView, Hide button text, Owner Draw Button, Disable button, and Hide button. A 'Save' button is at the bottom. The 'Referenced by' section shows the button is used in the Header of 'TE\_V5\_V1.SubList'. On the right, the 'Action for Button CORE\_V5\_NewFromV1' panel shows the 'Action Template' set to 'ExpandNew', which 'Creates a new record in expanded view.' and has the option 'Pass arguments as an object' checked. The 'Input Arguments' table is as follows:

|                  |             |
|------------------|-------------|
| InfoAreaId       | V5          |
| link             | Linked      |
| history          | none        |
| copyUId          | Linked      |
| copySourceFields | \$Reference |
| copyTargetFields | 13          |
| createNewTab     | true        |

### Button CORE\_V5\_NewFromV4

The screenshot shows the configuration for the button 'CORE\_V5\_NewFromV4'. The left panel is identical to the previous one, but the 'Referenced by' section shows the button is used in the Header of 'TE\_V5\_V4.SubList'. The right panel, 'Action for Button CORE\_V5\_NewFromV4', is also identical, but the 'copyTargetFields' value in the 'Input Arguments' table is 14.

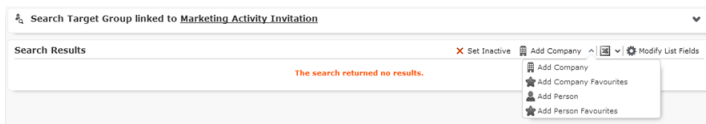
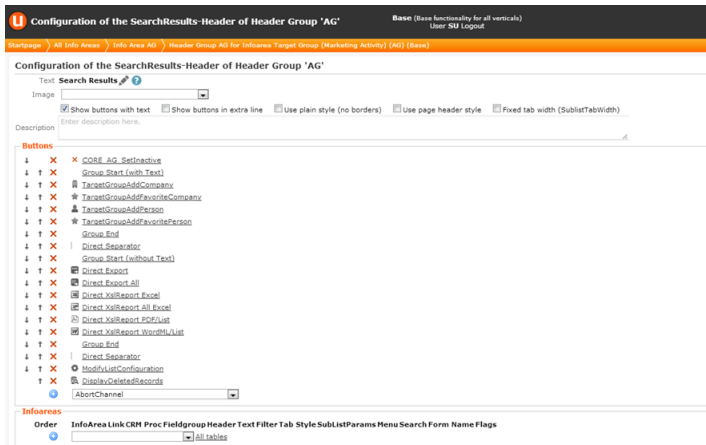
|                  |             |
|------------------|-------------|
| InfoAreaId       | V5          |
| link             | Linked      |
| history          | none        |
| copyUId          | Linked      |
| copySourceFields | \$Reference |
| copyTargetFields | 14          |
| createNewTab     | true        |

# Process Rework Target Group

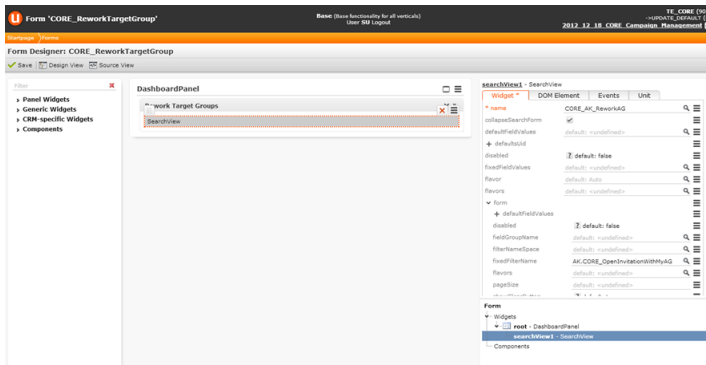
This process is designed to support the re-working of an automatically generated target group, e.g. by a sales rep.

## Designer Configuration

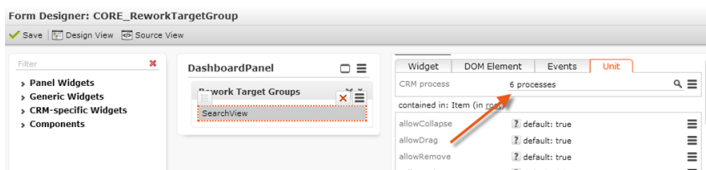
### SearchResults-Header of Header Group AG



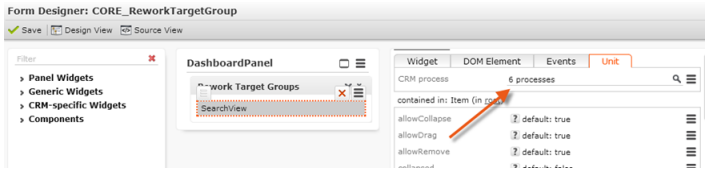
## CORE\_ReworkTargetGroup Form



The form is assigned to the following processes:



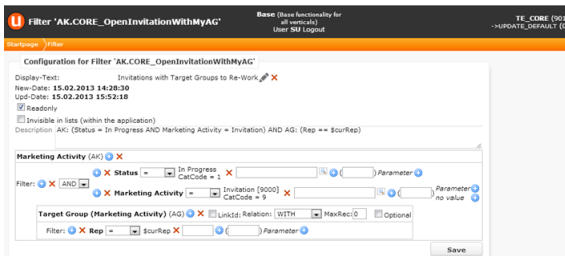
If the role of a user (group) has the right to access this process, then the form is displayed (e.g. on the start page of the user).



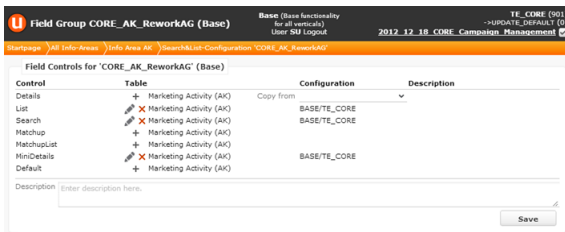
## AK.CORE\_OpenInvitationWithMyAG Filter

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

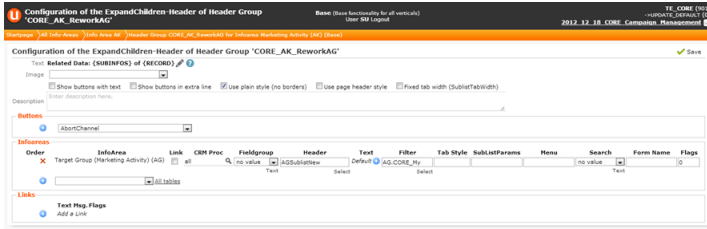
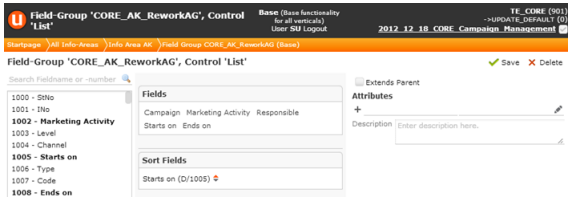
## CORE\_AK\_ReworkAG Search&List



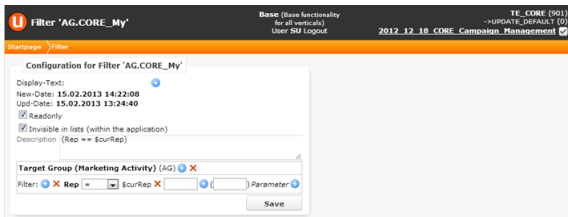
## CORE\_AK\_ReworkAG Field Group



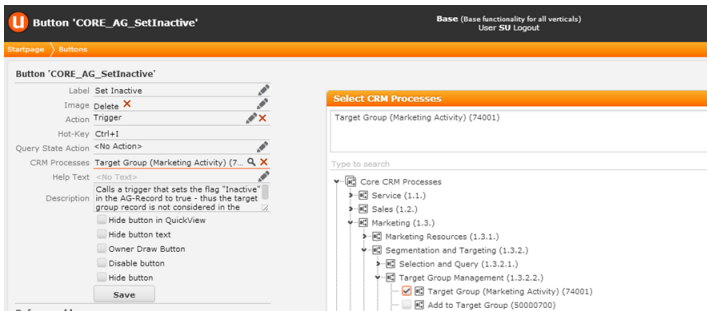
## CORE\_AK\_ReworkAG List



## AG.CORE\_My Filter



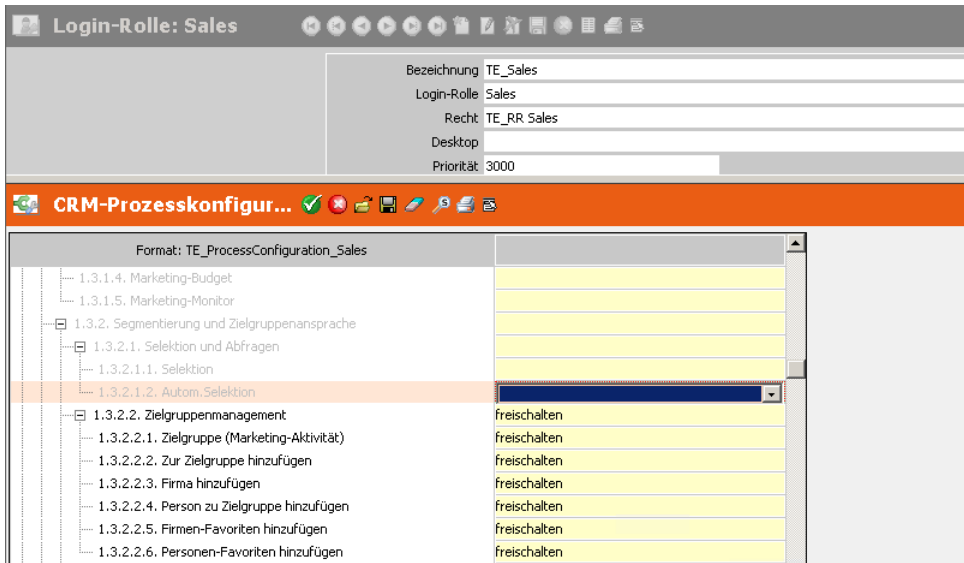
## CORE\_AG\_SetInactive Button



## 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.

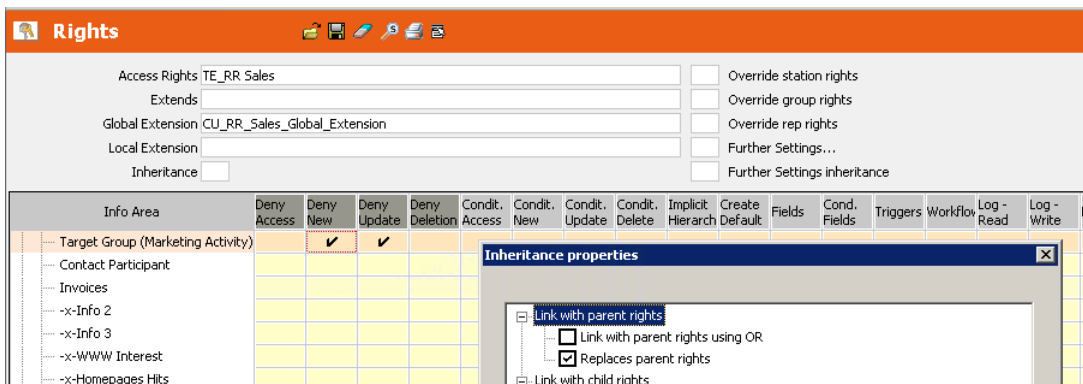




This should display the “Form Designer: CORE\_ReworkTargetGroup” form on the start page of a sales user.

### 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

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>Process</b></p> <ul style="list-style-type: none"> <li>• CORE_Innovation_IdeaMgmt</li> </ul> <p><b>Process Steps</b></p> <ul style="list-style-type: none"> <li>• CORE_InnovationIdeaMgmt_ChangeToBacklog</li> <li>• CORE_InnovationIdeaMgmt_ChangeToEvaluation</li> <li>• CORE_InnovationIdeaMgmt_ChangeToRealization</li> <li>• CORE_InnovationIdeaMgmt_ChangeToArchive</li> <li>• CORE_InnovationIdeaMgmt_CheckRepRole</li> <li>• CORE_InnovationIdeaMgmt_DisplayAppropriateIAForm</li> <li>• CORE_SocialIdeaManagement_GetTwistId</li> <li>• CORE_SocialIdeaManagement_NewIdea</li> <li>• CORE_SocialIdeaManagement_UpdateTwist</li> </ul> <p><b>Buttons</b></p> <ul style="list-style-type: none"> <li>• CORE_IA_NewIdea</li> <li>• CORE_IA_ChangePhaseToArchive</li> <li>• CORE_IA_ChangePhaseToBacklog</li> <li>• CORE_IA_ChangePhaseToEvaluation</li> <li>• CORE_IA_ChangePhaseToRealization</li> <li>• CORE_IA_InnovationMgmt_ChangeCommunityStage</li> <li>• CORE_InnovationIdeaMgmt_NewCommunityComment</li> <li>• CORE_InnovationIdeasMgmt_NewInternalComment</li> <li>• CORE_InnovationIdeaMgmt_NewCommunitySolution</li> <li>• CORE_InnovationIdeaMgmt_NewInternalSolution</li> <li>• CORE_InnovationIdeaMgmt_SaveInternal</li> <li>• CORE_TW_InnovationIdeaMgmt_Feedback</li> </ul> <p><b>JavaScript</b></p> | <p><b>Forms</b></p> <ul style="list-style-type: none"> <li>• CORE_Innovation_IdeaMgmt</li> </ul> <p><b>Expand Configs</b></p> <ul style="list-style-type: none"> <li>• IA</li> <li>• IA.QuickView</li> <li>• CORE_IA_IDEAMGMT_ProductManager</li> <li>• CORE_MA_IDEAMGMT_CommunityComment</li> <li>• CORE_MA_IDEAMGMT_CommunitySolution</li> <li>• CORE_TW_IDEAMGMT_Feedback</li> <li>• CORE_NO_IDEAMGMT_InternalComment</li> <li>• CORE_NO_IDEAMGMT_InternalSolution</li> </ul> <p><b>Field groups</b></p> <ul style="list-style-type: none"> <li>• IA</li> <li>• CORE_IA_IDEAMGMT_QuickView</li> <li>• CORE_IA_IDEAMGMT_ProductManagerView</li> <li>• CORE_MA_IDEA</li> <li>• CORE_TW_IDEAMGMT_Feedback</li> <li>• CORE_NO_IDEAMGMT_InternalComment</li> <li>• CORE_NO_IDEAMGMT_InternalSolution</li> </ul> <p><b>Header groups</b></p> <ul style="list-style-type: none"> <li>• IA</li> <li>• CORE_IA_IDEAMGMT_FormArchive</li> <li>• CORE_IA_IDEAMGMT_FormBacklog</li> <li>• CORE_IA_IDEAMGMT_FormEvaluation</li> <li>• CORE_IA_IDEAMGMT_FormRealization</li> <li>• CORE_MA_IDEA_CommunityComment</li> <li>• CORE_MA_IDEA_CommunitySolution</li> <li>• CORE_TW_IDEAMGMT_Feedback</li> <li>• CORE_NO_IDEAMGMT_InternalComments</li> <li>• CORE_NO_IDEAMGMT_InternalSolution</li> </ul> |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

|                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                     |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• \web\scripts\te.base\basecallbackfunc- tions.js</li> <li>• \web\scripts\te.base\baseideamgmtfunc- tions.js</li> <li>• \web\scripts\te.base\basequerystates.js</li> </ul> <p><b>Menus/Actions</b></p> <ul style="list-style-type: none"> <li>• CORE_ID_NET_IdeaMgmt</li> <li>• CORE_C_QueryFieldValue</li> <li>• CORE_C_QueryFieldValue2</li> </ul> | <p>tions</p> <p><b>TableCaption</b></p> <ul style="list-style-type: none"> <li>• IA</li> </ul> <p><b>Special Header</b></p> <ul style="list-style-type: none"> <li>• CORE_IdeaMgmt</li> </ul> <p><b>Textgroup</b></p> <ul style="list-style-type: none"> <li>• CORE_SocialIdeaManagement</li> </ul> |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

**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.

Items of Offer 10001-2100000935-5 - Open

Deselect

All Overview Last Entries

Product Group

Item name

+ Add more ...

Max. 15 records per page

| Item No. | Item name | Product |
|----------|-----------|---------|
| ✓ ✗ A001 | A001      |         |
| A002     | A002      |         |
| A003     | A003      |         |
| A004     | A004      |         |

You need to configure item structures for your item masters:

**Item Structure A001 in S-000 (Structure 1)**

Adjust Layout & Fields

Structure type: **Structure 1** (dropdown)

Item Master: **A001** (search icon, red X)

Active from: (dropdown)

Quantity: (input field)

Alternative:

Bundle code: (input field)

Target item: **S-000** (search icon, red X)

Active to: (dropdown)

Max. Quantity: (input field)

Parent Data

📄 📁 📌 A001

- 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:

**Test**

Adjust Layout & Fields

Item name: **Test**

Item No.: **S-000**

Product Group: (input field)

Product: (input field)

Settings: **Image**

Discount limit: 0,00%

No effect on stock:

Hierarchy identifier:  (highlighted with red box)

Available:

Est. available from: (input field)

Manufacturer: (input field)

Add as Component:

Add as Installed B...:

Working time/Trav...:

Item requires offe...:

Price Lists x | Item Master Texts x | Bulk Volumes x | Sales Area (Item) x | **Item Structure** x

| Structure type | Bundle code | Item Master | Target item |
|----------------|-------------|-------------|-------------|
| Structure 1    |             | A001        | S-000       |
| Structure 1    |             | A002        | S-000       |
| Structure 1    |             | A003        | S-000       |

The field 'Hierarchy 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 Hierarchy 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

**Process Step 'TE\_PR\_OfferMgmt\_APSerialEntry'**

Save Delete Usage Graph Processes...

Input Message  
Output Message  
Step  
+ New Name

**Action** ?

Action Template HierarchicalSerialEntry

Serial entry page.

Pass arguments as an object ?

End process with this action

Input Arguments

| Source            | Value                       | Name                 |
|-------------------|-----------------------------|----------------------|
| Constant Value    | Offer(AR=>AP)               | name                 |
| ! Process Storage | \$.get("uid")               | uid                  |
| Constant Value    | Your Item Master number     | hierarchyRootId      |
| Constant Value    | AP.SerialEntry              | listFieldGroupName   |
| Constant Value    | SerialEntry.Default.Options | optionsFormName      |
| Constant Value    | 0                           | copySourceFields     |
| Constant Value    | 4                           | copyTargetFields     |
| Constant Value    | AR                          | searchFieldGroupName |
| Constant Value    | AR.TE_no_identifiers        | fixedFilter          |

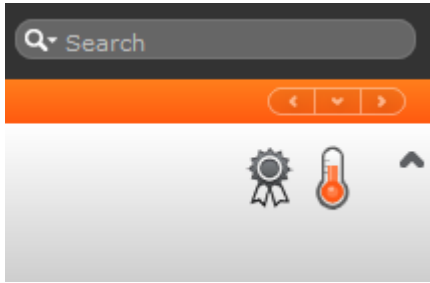
+ New Argumentname

## 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).





### Company

|                      |                                                                                    |
|----------------------|------------------------------------------------------------------------------------|
| KAM Level 0          |  |
| KAM Level 1 (First)  |                                                                                    |
| KAM Level 1 (Second) |                                                                                    |
| KAM Level 1 (Third)  |                                                                                    |
| KAM Level 2 (First)  |  |
| KAM Level 2 (Second) |  |

## Key-Account Management Dashboard (Startpage)

Form: 'TE\_Startpage\_KeyAccountManagement'

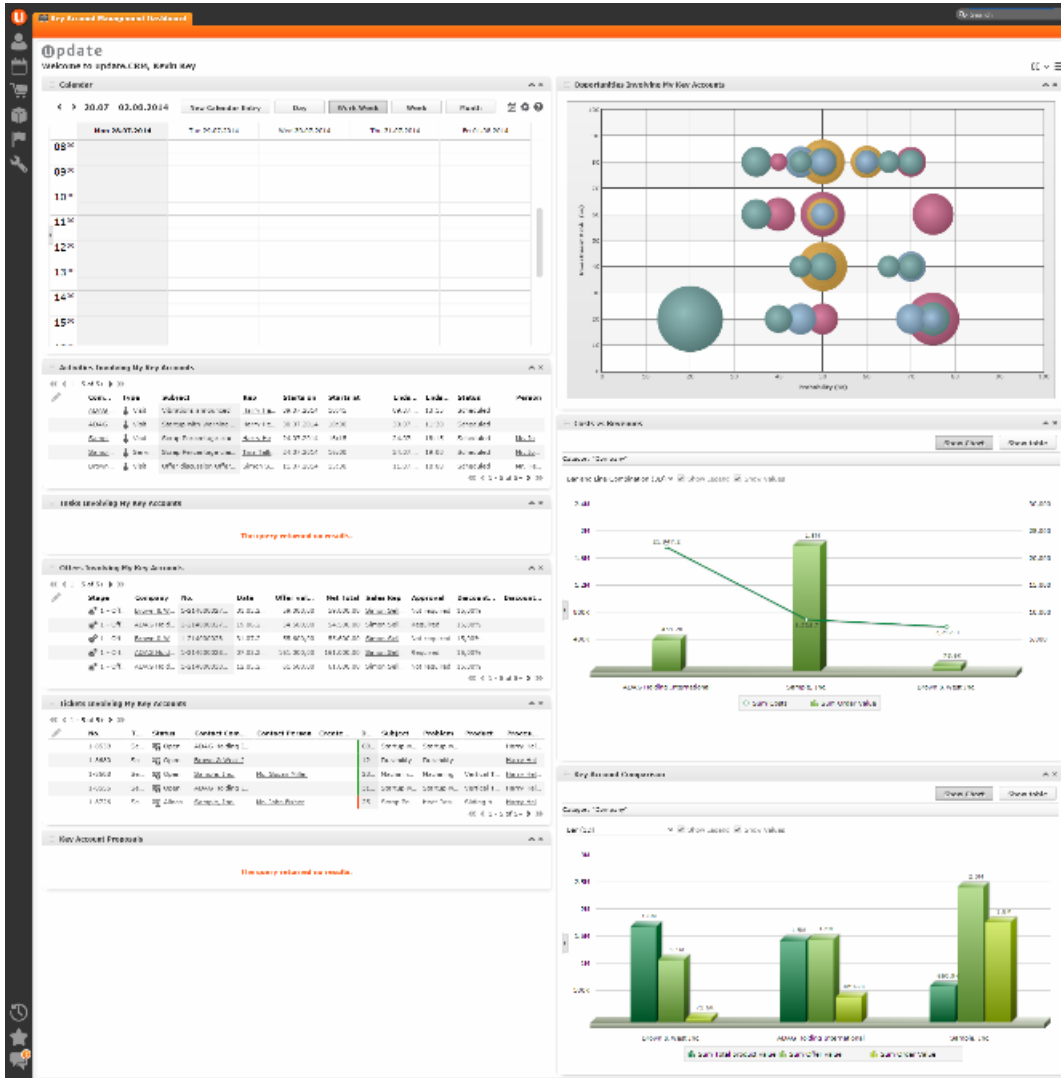
Most Elements on this Startpage are straight forward but the Opportunity Matrix is a little bit special. The form widget itself does nothing else than calling it's own form and is used like an anchor in which the javascript places the xslt-report. The javascript is called through a handler which is only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

```

"events": [
 { "eventName": "onCreate", "handlerType": "Function", "handler": "u8.TeISL.ReportFunctions.run_opportunityMatrix(\"te.isl\\\\\\\\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"]
 }
]
},
],

```

**Configuration for: Query 'TE\_A1\_KeyAccountLiveTile'**

✓ Save

New Date 21.07.2014 08:07:45  
 Upd Date 24.07.2014 09:45:27

Readonly  
 Invisible in lists (within the application)  
 Include Associations

Hints  default  enabled  disabled

CRM Processes all 🔍

Description used in TE\_FI\_KeyAccountDashboard  
 MR, 2014-07-21: created

---

**Company (FI)** + X

Fields FI\_StaNo (0) +

Sort FI\_StaNo (0) +

Filter + X AND + X Key Account (5033) = Y X + ( ) +  
 + X Rep (24) = \$curRep X + ( ) +

**Task (A1)** + X LinkId 30000 Relation WITH Max Rows 0  Optional

Select

Fields Subject (58) X, Rep (4) X, Link (115) X A1\_StaNo (0) +

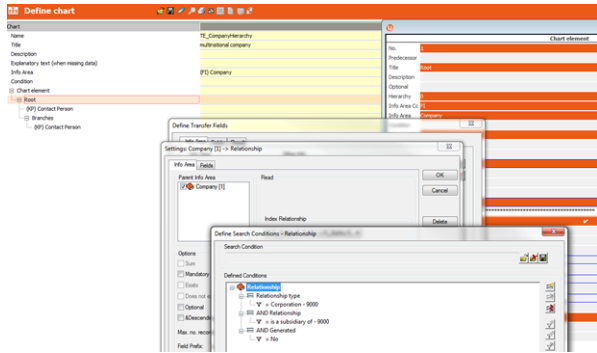
Sort Starts on (38) (asc) X A1\_StaNo (0) +

Filter A1\_StaNo (0) func + FIELD

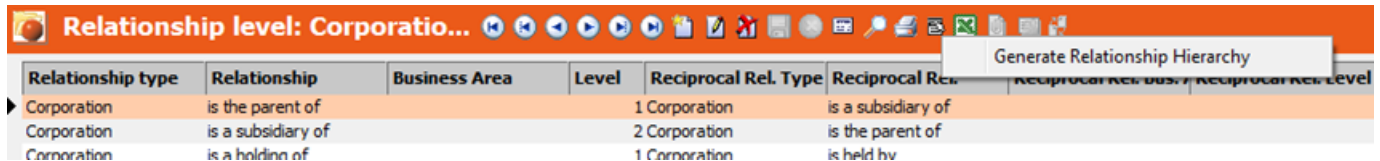
Additionally this Form holds a component to get the rootUid (the FI-Uid) through to the opportunity-matrix javascript. The eventhandler works like in the dashboard on the startpage, calling the same javascript function but with another xsli.

## 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.

**Rechte**

Rechtebez.  Stationsrecht aufheben  
 Erweiterung von  Gruppenrecht aufheben  
 Globale Erweiterung  Bearbeiterrecht aufheben  
 Lokale Erweiterung  Weitere Einstellungen...  
 Vererbung  Vererbung für weitere Einstellungen

| Infobereich                  | Sperre Upd | Sperre Löschen | Zugriff bedingt | Neu bedingt | Upd bedingt | Löschen bedingt | Implizite Hierarch Neu | Vorgabe Felder | Felder bedingt | Trigger                             | Workflow | Protokoll Lesen | Protokoll - | Historie | Gelöscht markiere | Weitere Einstellung |
|------------------------------|------------|----------------|-----------------|-------------|-------------|-----------------|------------------------|----------------|----------------|-------------------------------------|----------|-----------------|-------------|----------|-------------------|---------------------|
| Lead                         |            |                |                 |             |             |                 |                        |                |                | <input checked="" type="checkbox"/> |          |                 |             |          |                   |                     |
| Importierte Beteiligte Daten |            |                |                 |             |             |                 |                        |                |                | <input checked="" type="checkbox"/> |          |                 |             |          |                   |                     |

---

**Trigger:Lead**

|   | Workflow | Name                             | Index-Beziehung | Bedingt                             | Neu                                 | Upd                                 | Löschen | Upd Bed. | Upd Felder | Eigenscha                           |
|---|----------|----------------------------------|-----------------|-------------------------------------|-------------------------------------|-------------------------------------|---------|----------|------------|-------------------------------------|
| 0 |          | CORE_A034_DV_DefaultValues       |                 |                                     | <input checked="" type="checkbox"/> |                                     |         |          |            | <input checked="" type="checkbox"/> |
| 1 |          | CORE_A034_set_closed_created_Opp |                 | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> |         |          |            | <input checked="" type="checkbox"/> |
| 2 |          | A034_UPD_copy_from_FI            |                 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |         |          |            | <input checked="" type="checkbox"/> |
|   |          | Neue Zeile                       |                 |                                     |                                     |                                     |         |          |            |                                     |

## Designer Configuration

### Application Menu

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

Menu 'ID\_NET\_PROCESSES'

Save Delete

Text Sales  
 Configuration TE\_ISI  
 CRM Processes Application Menu: Sale...  
 Info Area  
 QuickLink Context  
 Image <No Image>  
 Visible  
 Main Menu  
 Header Text <No Text>  
 Default Action <No Action>  
 Sales Menu (816)  
 Description

Referenced by  
 Menu \$Main FSLEFT UPDATE.NET  
 Expand no reference  
 SearchAndList no reference  
 TreeView no reference  
 Button no reference

Expand All Entries

Menu Entries

|                                     |                                   |                                 |                |     |   |
|-------------------------------------|-----------------------------------|---------------------------------|----------------|-----|---|
| <input checked="" type="checkbox"/> | TE_ID_NET_DASHBOARD_SALES         | Sales Dashboard                 | TE_ISI         | all | Q |
| <input checked="" type="checkbox"/> | TE_ID_NET_DASHBOARD_KeyAccount... | Key Account Management Dashb... | TE_ISI         | all | Q |
| <input checked="" type="checkbox"/> | ID_NET_SEPARATOR                  |                                 | UPDATE_DEFAULT | all | Q |
| <input checked="" type="checkbox"/> | TE_ID_NET_LEADS                   | Leads                           | TE_ISI         | all | Q |
| <input checked="" type="checkbox"/> | TE_ID_NET_LEAD_NEW                | New Lead                        | TE_ISI         | all | Q |
| <input checked="" type="checkbox"/> | ID_NET_OPPORTUNITIES              | Opportunities                   | TE_ISI         | all | Q |
| <input checked="" type="checkbox"/> | ID_NET_OPPORTUNITY_NEW            | New Opportunity                 | TE_ISI         | all | Q |
| <input checked="" type="checkbox"/> | ID_NET_OFFER                      | Offers                          | TE_ISI         | all | Q |
| <input checked="" type="checkbox"/> | ID_NET_ORDER_SEARCH               | Orders                          | TE_ISI         | all | Q |
| <input checked="" type="checkbox"/> | TE_ID_NET_PRICE_LIST              | Price Lists                     | TE_ISI         | all | Q |
| <input checked="" type="checkbox"/> | ID_NET_PRODUCTS                   | Item Master                     | TE_ISI         | all | Q |
| <input checked="" type="checkbox"/> | ID_NET_SEPARATOR                  |                                 | UPDATE_DEFAULT | all | Q |

Menu 'TE\_ID\_NET\_LEADS'

Save Delete

Text Leads  
 Configuration TE\_ISI  
 CRM Processes Lead Management (70000800)  
 Info Area A034  
 QuickLink Context  
 Image INFOAREA\_A034  
 Visible  
 Action Search  
 Description Application-Menu-Action: TE\_ID\_NET\_LEADS

Referenced by  
 Menu ID\_NET\_PROCESSES  
 Expand no reference  
 SearchAndList no reference  
 TreeView no reference  
 Button no reference

Action for Menu TE\_ID\_NET\_LEADS

Action Template Search  
 Searches for records and displays them in the list  
 Pass arguments as an object

Input Arguments













! searchAndListName A034  
 + New Argumentname

Output Arguments

+ New Argumentname

## 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:

TE\_CORE (6 of 45)

|                                                                                                                         |                                                                                                                    |                                                                                                                       |
|-------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|
|  CORE_A034_create_FI_...<br>TE_CORE  |  CORE_A034_create_KP<br>TE_CORE |  CORE_A034_create_Y1<br>TE_CORE    |
|  CORE_A034_new<br>TE_CORE Ctrl+Alt+N |  CORE_A034_quick_new<br>TE_CORE |  CORE_A034_quick_new...<br>TE_CORE |

- 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

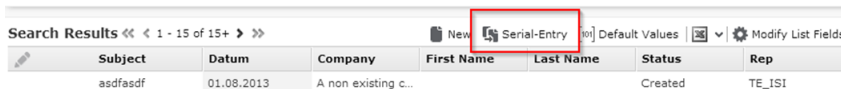
There are two context menu actions:

- 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:



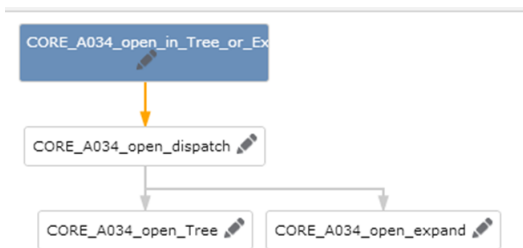
| Subject  | Datum      | Company             | First Name | Last Name | Status  | Rep    |
|----------|------------|---------------------|------------|-----------|---------|--------|
| asdfasdf | 01.08.2013 | A non existing c... |            |           | Created | TE_ISI |

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

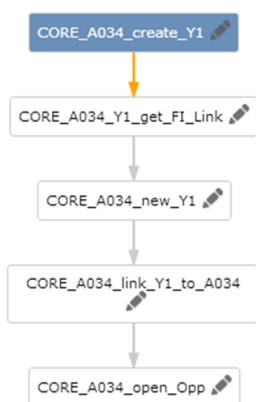


- The following things are carried out in the entry step of the process:
  - The lead record from where the process was started is written to the process storage
  - From the started lead record, all person-related fields are written to the process storage (combined into two variables) to check later 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

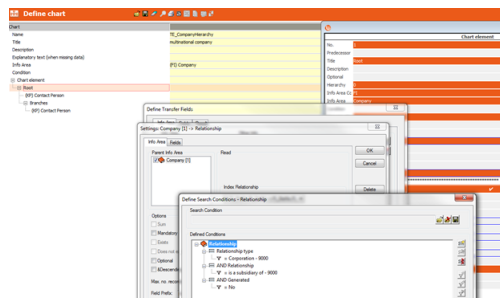
### Process Create New Opportunity



- 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':

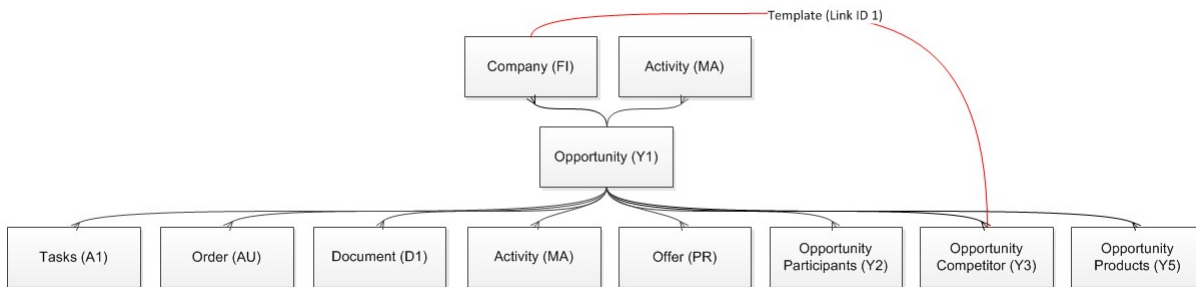
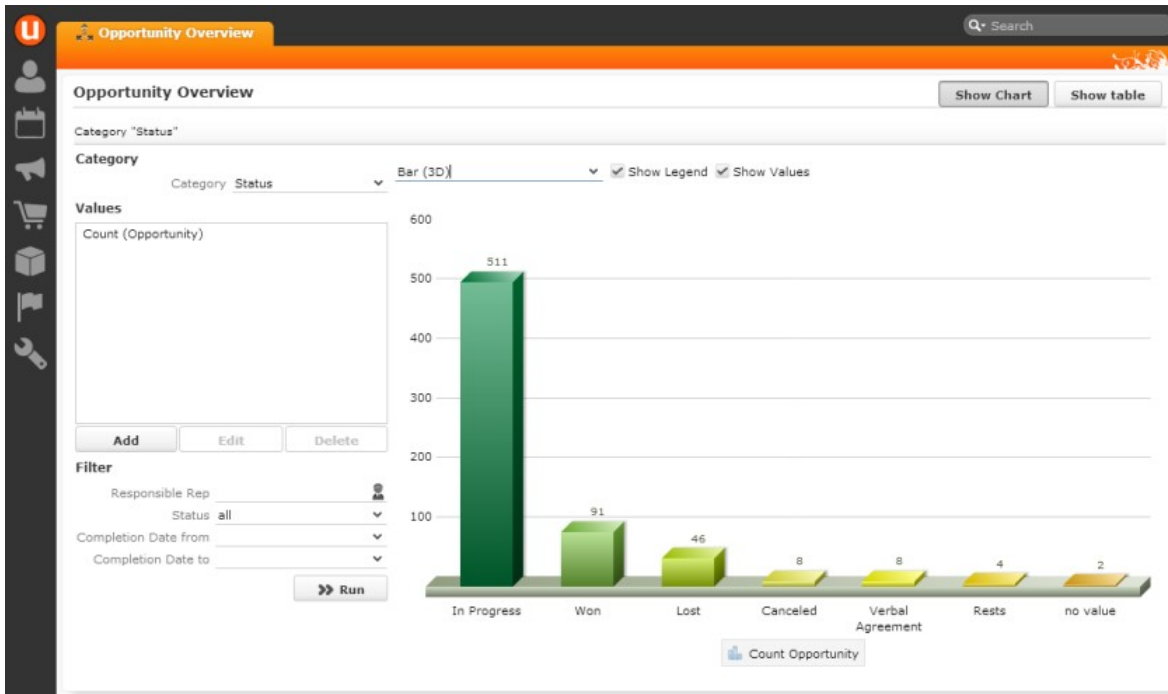
The screenshot shows a window titled 'Relationship level: Corporatio...'. It contains a table with the following data:

| Relationship type | Relationship       | Business Area | Level         | Reciprocal Rel. Type | Reciprocal Res. |
|-------------------|--------------------|---------------|---------------|----------------------|-----------------|
| Corporation       | is the parent of   |               | 1 Corporation | is a subsidiary of   |                 |
| Corporation       | is a subsidiary of |               | 2 Corporation | is the parent of     |                 |
| Corporation       | is a holder of     |               | 1 Corporation | is held by           |                 |

Below the table is a button labeled 'Generate Relationship Hierarchy'.

# Opportunity Management(CRM 6000020)

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”

New-Date: **03.07.2012 10:57:00**  
 Upd-Date: **04.07.2012 10:46:14**

Readonly  
 Invisible in lists (within the application)

Hints:  default  enabled  disabled

CRM Processes: all

---

**Opportunity (Y1)**

|                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>Opportunity</b></p> <p><b>OP Type</b></p> <p><b>Status</b></p> <p>Fields: <b>Completion Date</b></p> <p><b>Total Prod. Value</b></p> <p><b>OP Wtd. Total Prod. Value</b></p> <p><b>Resp. Rep ID</b></p> | <p><input checked="" type="radio"/> No Link <input type="radio"/> Link-Field <input type="radio"/> URL</p> <p><input checked="" type="radio"/> No Link <input type="radio"/> Link-Field <input type="radio"/> URL</p> <p><input checked="" type="radio"/> No Link <input type="radio"/> Link-Field <input type="radio"/> URL</p> <p><input checked="" type="radio"/> No Link <input type="radio"/> Link-Field <input type="radio"/> URL</p> <p><input checked="" type="radio"/> No Link <input type="radio"/> Link-Field <input type="radio"/> URL</p> <p><input checked="" type="radio"/> No Link <input type="radio"/> Link-Field <input type="radio"/> URL</p> <p><input checked="" type="radio"/> No Link <input type="radio"/> Link-Field <input type="radio"/> URL</p> |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Sort:

Filter:

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

# Analyses – “OpportunityForecast”

Based on Query:

Max. Count of Bars:

CRM Processes:

Invisible in web-Lists  
 Type/Value fixed  
 All Column on X-Categories  
 No Sum Line  
 Quadrant analysis only  
 Query:  private  public  all

| Field Name                              | CriteriaField                       | AdditionalCriteria                  | ReadAll                             | DependentOnCurrency      | WeightedField            | DoNotSortBars            | ShowAllBars              | NoOther                  | MustSelect               | AlternateCurrencyField   | CategoryNotMandatory     | XCategory | Defaultvalue | Default-End | Slices | Category | List-Nr. | List-Width |
|-----------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|-----------|--------------|-------------|--------|----------|----------|------------|
| <b>Opportunity (1006)</b>               | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |           |              |             |        |          | 1        | %          |
| <b>OP Type (1008)</b>                   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |           |              |             |        |          | 2        | %          |
| <b>Resp. Rep ID (1010)</b>              | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |           |              |             |        |          | 8        | %          |
| <b>Status (1016)</b>                    | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |           |              |             |        |          | 3        | %          |
| <b>Completion Date (1043)</b>           | <input type="checkbox"/>            | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |           |              |             |        |          | 7        | %          |
| <b>Total Prod. Value (1145)</b>         | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |           |              |             |        |          | 4        | %          |
| <b>OP Wtd. Total Prod. Value (1147)</b> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |           |              |             |        |          | 5        | %          |

CriteriaDefault:   
 Weight:   
 Currency:

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.

**Default Values**

| Type                                    | Column                      |
|-----------------------------------------|-----------------------------|
| <input checked="" type="checkbox"/> Sum | TotalProdValue (fixed type) |
| <input checked="" type="checkbox"/> Sum | Weighted (fixed type)       |
| <input checked="" type="checkbox"/> Sum | Order in (fixed type)       |
| <input checked="" type="checkbox"/> Sum | ForSure (fixed type)        |
| <input checked="" type="checkbox"/> Sum | Uncertain (fixed type)      |
| <input checked="" type="checkbox"/> Sum | Unlikely (fixed type)       |

**Additional Values**

| Valuename                                          | Valuetype | Parameter                 | Display-Text               | Fixed Stat-Type Options |
|----------------------------------------------------|-----------|---------------------------|----------------------------|-------------------------|
| <input checked="" type="checkbox"/> Order in       | computed  | u8.services.catalogs.code | Won (order in)             | Sum                     |
| <input checked="" type="checkbox"/> Weighted       | computed  | \$Y1[147]                 | Weighted Total Prod. Value | Sum                     |
| <input checked="" type="checkbox"/> TotalProdValue | computed  | \$Y1[145]                 | Total Prod. Value          | Sum                     |
| <input checked="" type="checkbox"/> ForSure        | computed  | u8.services.catalogs.code | Open - Certain             | Sum                     |
| <input checked="" type="checkbox"/> Uncertain      | computed  | u8.services.catalogs.code | Open - Uncertain           | Sum                     |
| <input checked="" type="checkbox"/> Unlikely       | computed  | u8.services.catalogs.code | Open - Unlikely            | Sum                     |
| <input checked="" type="checkbox"/>                | Computed  |                           |                            | all                     |

## 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:

```

1 (function()
2 {
3 // Functions used in analyses.
4
5 u8.TeBase.Analyses =
6 {
7 catalogCodeToExternalKey: function(catalogNo, code)
8 {
9 return u8.services.catalogs.codeToExternalKey(catalogNo, code);
10 }
11 };
12
13
14 })();
15

```

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, int>**  
 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”

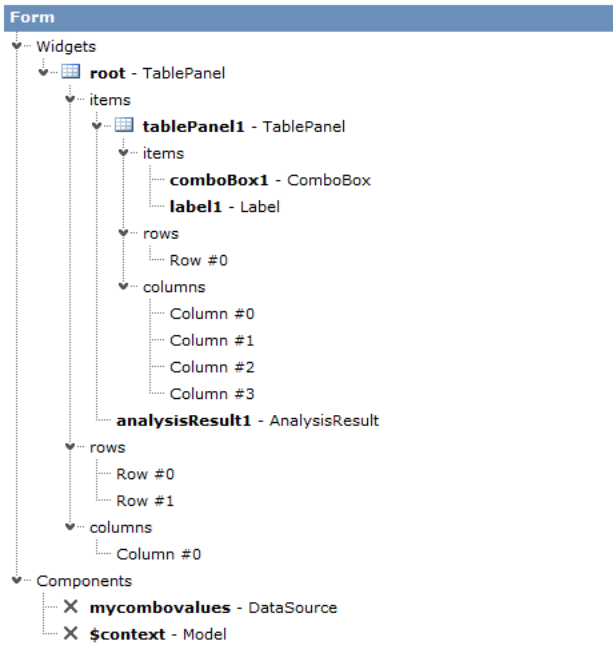
| Parameter Type:                                                                                                                                                    | <b>Combobox</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                 |       |              |  |  |   |  |  |  |   |                 |  |  |   |              |  |  |   |              |  |  |   |              |  |  |  |  |  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|-------|--------------|--|--|---|--|--|--|---|-----------------|--|--|---|--------------|--|--|---|--------------|--|--|---|--------------|--|--|--|--|--|
| Display Name:                                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                 |       |              |  |  |   |  |  |  |   |                 |  |  |   |              |  |  |   |              |  |  |   |              |  |  |  |  |  |
| CRM Process:                                                                                                                                                       | all                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                 |       |              |  |  |   |  |  |  |   |                 |  |  |   |              |  |  |   |              |  |  |   |              |  |  |  |  |  |
| <b>Parameter Options</b>                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                 |       |              |  |  |   |  |  |  |   |                 |  |  |   |              |  |  |   |              |  |  |   |              |  |  |  |  |  |
| <input type="radio"/> Use Options from another Parameter<br><input type="radio"/> Use Options from an external source<br><input checked="" type="radio"/> Options: |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                 |       |              |  |  |   |  |  |  |   |                 |  |  |   |              |  |  |   |              |  |  |   |              |  |  |  |  |  |
|                                                                                                                                                                    | <table border="1"> <thead> <tr> <th></th> <th>Value</th> <th>Display Text</th> <th></th> </tr> </thead> <tbody> <tr> <td></td> <td>4</td> <td></td> <td></td> </tr> <tr> <td> </td> <td>0</td> <td>current quarter</td> <td></td> </tr> <tr> <td> </td> <td>1</td> <td>next quarter</td> <td></td> </tr> <tr> <td> </td> <td>2</td> <td>last quarter</td> <td></td> </tr> <tr> <td> </td> <td>3</td> <td>current year</td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> |                 | Value | Display Text |  |  | 4 |  |  |  | 0 | current quarter |  |  | 1 | next quarter |  |  | 2 | last quarter |  |  | 3 | current year |  |  |  |  |  |
|                                                                                                                                                                    | Value                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Display Text    |       |              |  |  |   |  |  |  |   |                 |  |  |   |              |  |  |   |              |  |  |   |              |  |  |  |  |  |
|                                                                                                                                                                    | 4                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                 |       |              |  |  |   |  |  |  |   |                 |  |  |   |              |  |  |   |              |  |  |   |              |  |  |  |  |  |
|                                                                                                                                                                    | 0                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | current quarter |       |              |  |  |   |  |  |  |   |                 |  |  |   |              |  |  |   |              |  |  |   |              |  |  |  |  |  |
|                                                                                                                                                                    | 1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | next quarter    |       |              |  |  |   |  |  |  |   |                 |  |  |   |              |  |  |   |              |  |  |   |              |  |  |  |  |  |
|                                                                                                                                                                    | 2                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | last quarter    |       |              |  |  |   |  |  |  |   |                 |  |  |   |              |  |  |   |              |  |  |   |              |  |  |  |  |  |
|                                                                                                                                                                    | 3                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | current year    |       |              |  |  |   |  |  |  |   |                 |  |  |   |              |  |  |   |              |  |  |   |              |  |  |  |  |  |
|                                                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                 |       |              |  |  |   |  |  |  |   |                 |  |  |   |              |  |  |   |              |  |  |   |              |  |  |  |  |  |
| <input type="button" value="» Save"/>                                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                 |       |              |  |  |   |  |  |  |   |                 |  |  |   |              |  |  |   |              |  |  |   |              |  |  |  |  |  |

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:

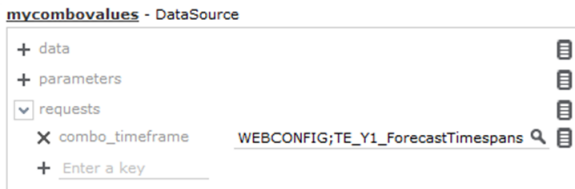
|                     |  |
|---------------------|--|
| Select a timeframe: |  |
| AnalysisResult      |  |



**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:**

```

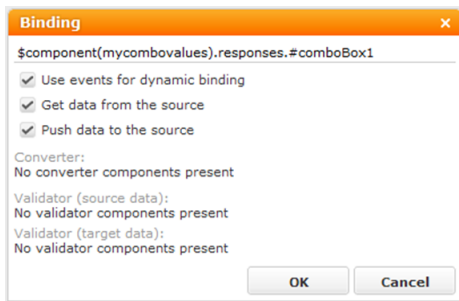
"components": {
 "mycombovalues": {
 "type": "DataSource",
 "options": {
 "requests": { "comboBox1": "WEBCONFIG;TE_Y1_ForecastTimespans" }
 }
 },
 "$context": { "type": "Model", "options": {} }
}

```



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.
```

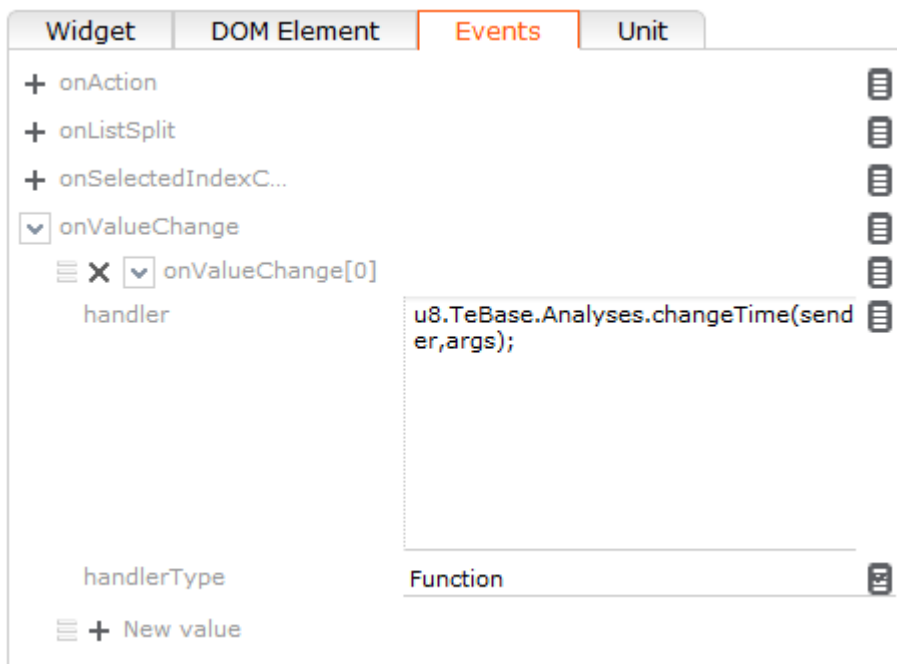


This is how the connection between the combo box and the “external” data source (web config parameter) is created.

### 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 “onValueChanged” 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(“...”) 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:



Action Template **ShowForm** 

Shows a Form

 Pass arguments as an object Input Arguments 

CreateNewTab \_\_\_\_\_

createNewPopup \_\_\_\_\_


**!** FormNameCORE\_OpportunityManagement\_Fo  

HeaderName \_\_\_\_\_

HeaderType

Special \_\_\_\_\_

InfoArea / RecID

<No Value> 

InitialTabNr \_\_\_\_\_

Options \_\_\_\_\_

Scripts \_\_\_\_\_

Textgroups \_\_\_\_\_

**+** New Argumentname \_\_\_\_\_

Output Arguments

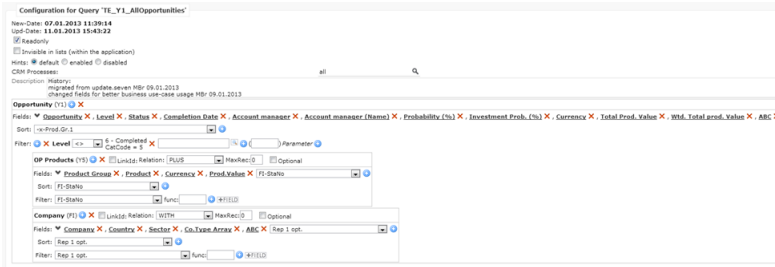
**+** New Argumentname \_\_\_\_\_

## Opportunity Sales Funnel

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

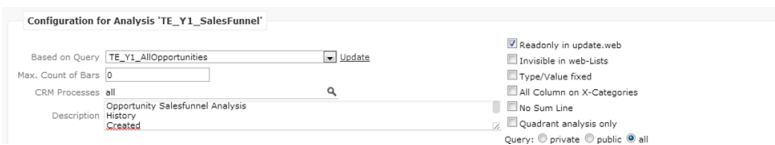
It consists of four elements and can be called directly from the “Queries and Analysis” application menu.

**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



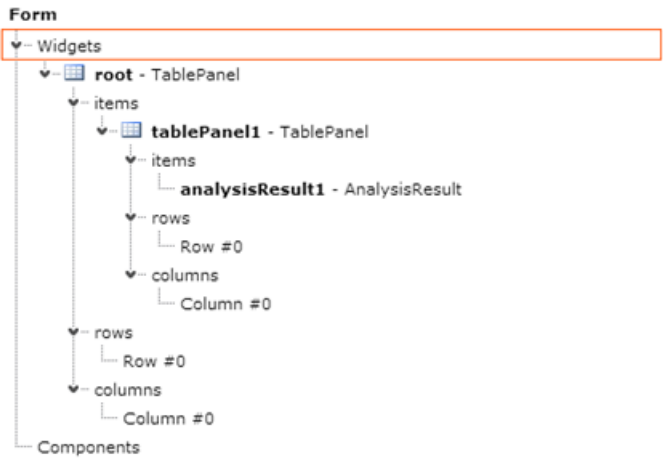
| Field Name                     | Default | Value | End | Slices | Category | List-Nr.    | List-Width |
|--------------------------------|---------|-------|-----|--------|----------|-------------|------------|
| ▲ Opportunity (1)              |         |       |     |        |          |             |            |
| ✗ Opportunity (6)              |         |       |     |        |          | 2           | %          |
| ✗ Level (9)                    |         |       |     |        |          | 3           | %          |
| ✗ Account manager (12)         |         |       |     |        | ScurRep  |             | %          |
| ✗ Status (16)                  |         |       |     |        |          | 4           | %          |
| ✗ Probability (%) (37)         |         |       |     |        |          | 5           | %          |
| ✗ Investment Prob. (%) (38)    |         |       |     |        |          | 6           | %          |
| ✗ Completion Date (43)         |         |       |     |        | ScurYear | ScurYear-1y |            |
| ✗ Total Prod. Value (145)      |         |       |     |        |          | 7           | %          |
| ✗ Wtd. Total prod. Value (146) |         |       |     |        |          | 9           | %          |
| ✗ Account manager (Name) (159) |         |       |     |        |          | 8           | %          |
| ✗ Currency (4005)              |         |       |     |        |          |             | %          |
| ✗ ABC (5004)                   |         |       |     |        |          |             | %          |
| ▲ OP Products (1)              |         |       |     |        |          |             |            |
| ✗ Product Group (4)            |         |       |     |        |          |             | %          |
| ✗ Product (5)                  |         |       |     |        |          |             | %          |
| ✗ Prod. Value (6)              |         |       |     |        |          |             | %          |
| ✗ Currency (4005)              |         |       |     |        |          |             | %          |
| ▲ Company (1)                  |         |       |     |        |          |             |            |
| ✗ Company (2)                  |         |       |     |        |          | 1           | %          |
| ✗ Country (5)                  |         |       |     |        |          |             | %          |
| ✗ Co.Type Array (28)           |         |       |     |        |          |             | %          |
| ✗ Sector (29)                  |         |       |     |        |          |             | %          |
| ✗ ABC (5002)                   |         |       |     |        |          |             | %          |

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.

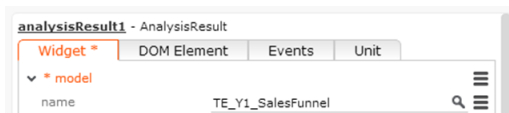
### Form: TE\_OpportunitySalesFunnel

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

### Page layout:



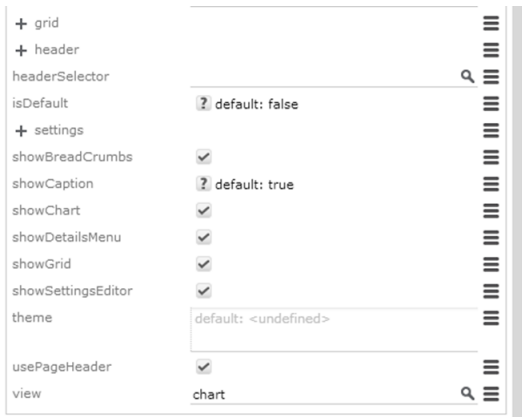
### analysisResult1 Configuration:



The above documented analysis is called.

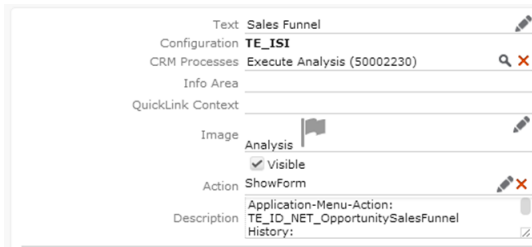


“Funnel” is selected as a chart and fixed chart type. The selector to change the default chart type is hidden.



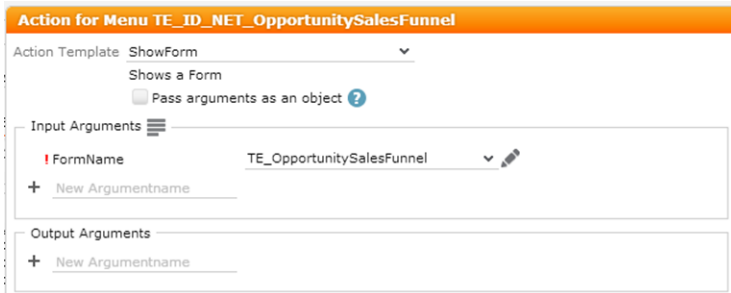
The “chart” view is selected as a default view, the details menu as well as the possibility to switch to “grid” view as available.

### 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:



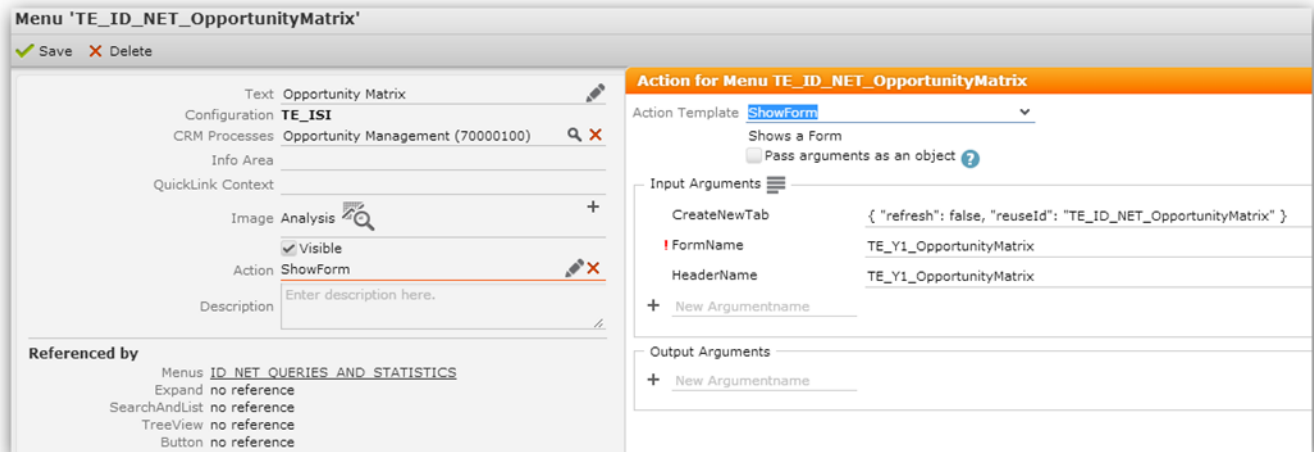
No additional configuration or settings are needed.

### Opportunity Matrix

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

Used menu action: “TE\_ID\_NET\_OpportunityMatrix”

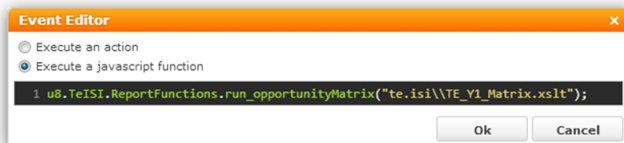




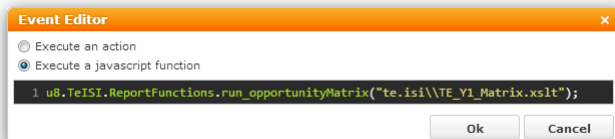
The form “TE\_Y1\_OpportunityMatrix” contains the following:

- 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 to 2.(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)<br>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_ToOppor-tunity | 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.                                    |

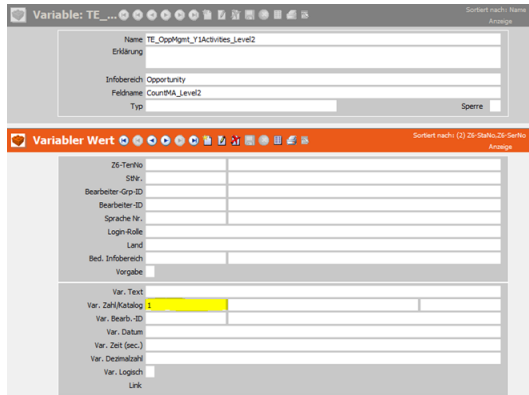
### Used Variables

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_Opp-Mgmt_Y1Partici-pants_Level2 | Count of opportunity participants Y2 from Y1 $\geq$ TE_Opp-Mgmt_Y1Partici-pants_Level2 | 1             |
| 2     | TE_OppMgmt_Y1Ac-tivities_Level2    | Count of activities from Y1 $\geq$ TE_OppMgmt_Y1Ac-tivities_Level2                     | 1             |
| 3     | TE_Opp-Mgmt_Y1Evalua-tion_Level3   | Estimate probability (Y1:6008) $\geq$ TE_Opp-Mgmt_Y1Evalua-tion_Level3                 | 10(%)         |

| Phase | Name                                      | Description                                                                                                                         | Default Value |
|-------|-------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|---------------|
| 3     | TE_Opp-Mgmt_Y1Competitor_Level3           | Count of competitor (Y3) from Y1 >= TE_Opp-Mgmt_Y1Competitor_Level3                                                                 | 1             |
| 3     | TE_Opp-Mgmt_Y5Product_Level3              | Count of opp. Products from Y1 >= TE_Opp-Mgmt_Y5Product_Level3                                                                      | 1             |
| 4     | TE_OppMgmt_Y1Activities_Level4            | Count of activities >= TE_Opp-Mgmt_Y1Activities_Level4                                                                              | 1             |
| 4     | TE_Opp-Mgmt_Y1Participants_Level4         | Count of participants from Y1 >= TE_Opp-Mgmt_Y1Participants_Level4                                                                  | 1             |
| 4     | TE_Opp-Mgmt_Y1Participants_Decider_Level4 | Count of participants (where role = "Decider") from Y1 >= TE_Opp-Mgmt_Y1Participants_Decider_Level4                                 | 1             |
| 5     | TE_OppMgmt_Y1Offer_Level5                 | Count of offers(State="Waiting for Decision") from Y1 >= TE_Opp-Mgmt_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_Opp-Mgmt_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

The screenshot shows the configuration form for a button named "TE\_Y1\_CopyOpportunityTo". The form includes the following fields and options:

- Label:** Copy Opportunity to ...
- Image:** Copy
- Action:** TE\_Y1\_CopyOpportunityTo
- Hot-Key:** (empty)
- Query State Action:** <No Action>
- CRM Processes:** Opportunity Management (70000100)
- Description:** Enter description here.
- Options:**
  - Hide button in QuickView
  - Hide button text
  - Owner Draw Button
  - Disable button
  - Hide button
- Save** button

This action calls the “TE\_Y1\_CopyOpportunityTo” process

The screenshot shows the configuration form for a menu named "TE\_Y1\_CopyOpportunityTo". The form includes the following fields and options:

- Text:** Copy Opportunity to ...
- Configuration:** TE\_ISI
- CRM Processes:** Opportunity Management (70000100)
- Info Area:** Y1
- QuickLink Context:** (empty)
- Image:** Copy
- Visible:**
- Action:** Process
- Description:** Enter description here.

The right-hand pane shows the configuration for the "Action for Menu TE\_Y1\_CopyOpportunityTo":

- Action Template:** Process
- Executes a process:**  Pass arguments as an object
- Input Arguments:**
  - ! name:** TE\_Y1\_CopyOpportunityTo
  - uid:** Record
  - createNewTab:** true
  - New Argumentname:** (empty)

**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:**

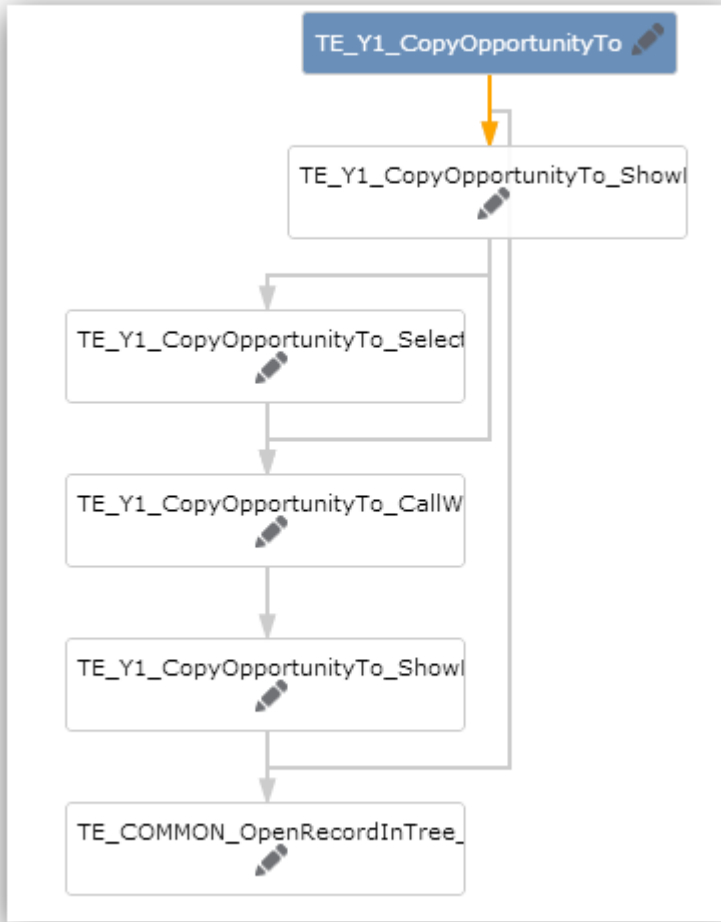
- TE\_Y1\_CopyOpportunityTo\_ChooseTarget (prompts the user whether he/she want to copy the opportunity to the same or another company)
- TE\_Y1\_CopyOpportunityTo\_CopyAgain (ask the user if he/she wants to copy the opportunity again to another target)

**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

| Portfolio ABC                                                         |                                                                                      |
|-----------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| Portfolio ABC<br>Text: Opportunity Evaluation                         | Type: Opportunity portfolio                                                          |
| Max. Points: 97,00                                                    | Portfolio Configuration: 2x2                                                         |
| Max. points (potential): 60,00<br>Potential description: Quantitative | Max. points (customer intimacy): 37,00<br>Customer intimacy description: Qualitative |
| Info Area Code: Y1<br>Info Area: Opportunity                          | Field Number: 17<br>Field Name: ABC                                                  |
| Created by: SU<br>Created on: 24.06.2013                              | Updated by: TE_ISI<br>Updated on: 27.06.2013                                         |

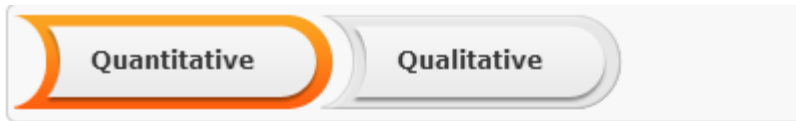
## weighting of Questions:

 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

**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: Qualitative Questions/Answers :



**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

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

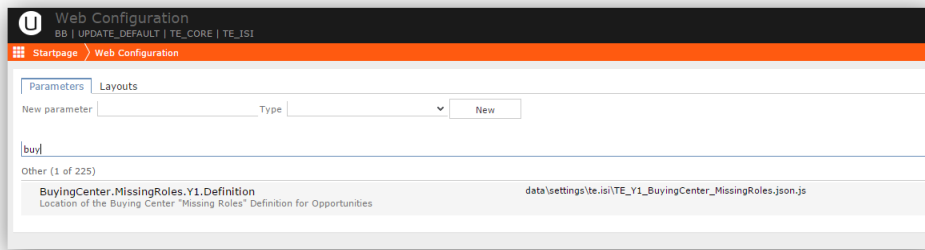
**Are references available?**

- 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".

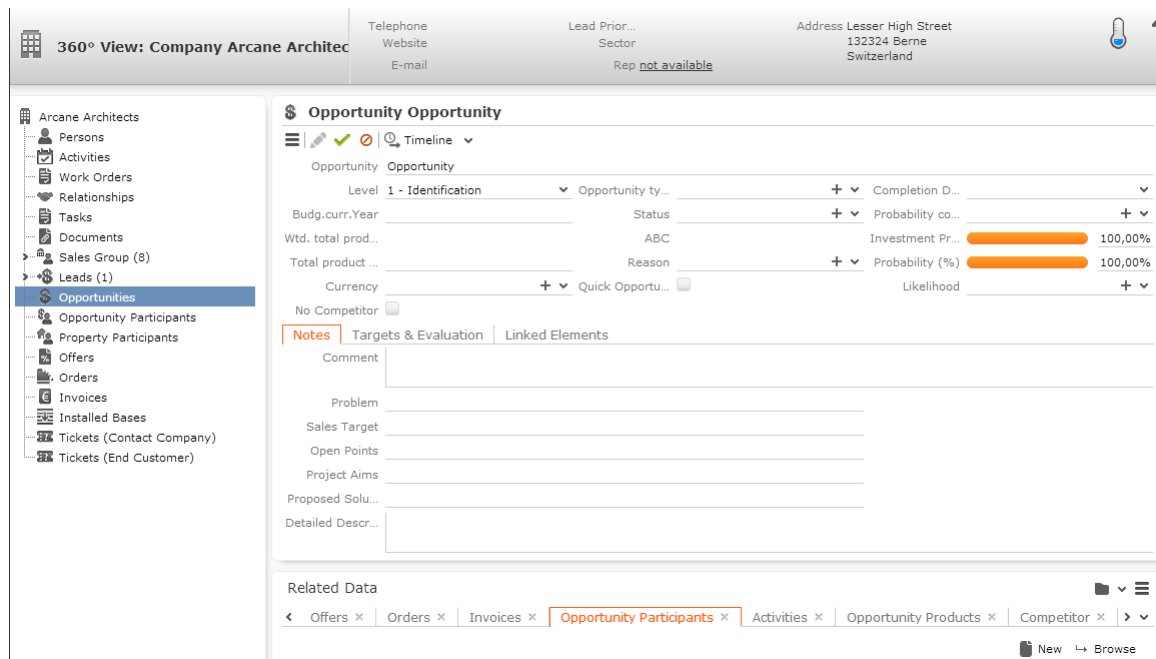
We adapted some things to fit the opportunity process, which is delivered by the template. The adaptations were made in the file "TE\_Y1\_BuyingCenter\_MissingRoles.json.js" which can easily be changed using the web configuration parameter.



## 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

**Configuration for 'Y1'**

Infoarea **Opportunity (Y1)**

Configuration Demo\_OppBasic

Field Group  ▼ [Show TE\\_Y1\\_Basic](#)

Header Group  ▼ [Show TE\\_Y1\\_Basic](#)

Context Menu  ▼ [Show M\\_Opportunity](#)

Default Action  ▼ [Show TE\\_A\\_OpenRecordInCompanyTreeview](#)

Description

Help ID

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

**Configuration for 'Y1'**

Field Group: TE\_Y1\_Basic [Show TE\\_Y1\\_Basic](#)

Header Group: TE\_Y1\_Basic [Show TE\\_Y1\\_Basic](#)

Table Caption: Y1 [Show Y1](#)

Menu: M\_Oppportunity [Show M\\_Oppportunity](#)

Info Area Default Action: TE\_A\_OpenRecordInCompanyTreeview

Info Area Default Menu: M\_Oppportunity [Show M\\_Oppportunity](#)

Description: Enter description here.

---

**1. Firma (F1)** ✘

View Parent Relations: 2. Lead (A034) [Tablecaption Name](#)  [Show all](#)

LinkId

[Add Parent Relation](#)

---

Breadcrumb-Parent: Firma (F1) [Tablecaption Name](#)  [Show all](#)

LinkId

---

| Field                                             | Cmp | Value        | Alternative |
|---------------------------------------------------|-----|--------------|-------------|
| no alternatives                                   |     |              |             |
| <a href="#">Add an alternative based on field</a> |     | FI_StaNo (0) |             |

Reason for Change: Enter a reason for your change.

[Save](#)

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

**TreeView 'FI'**

[Save](#) [Delete](#)

Description: Main FI tree view  
History: MR, 21.03.2013: renamed d3 node

---

+ Add | Decrease Indent | Increase Indent

**Firma (F1)**

- Person (KP)
- Aktivität (MA)
- Mailing (BR)
- Arbeitsauftrag (AF)
- Interesse (IT)
- Beziehung (PB)
- Opportunity-Beteiligter (Y2)
- Obj.-Beteiligter (OB)
- Angebot (PR)
- Dokument-Link (D3)
- Dokument (D1)
- Teilnehmer (V1)

**Info Area Settings**

\*Info Area: Opportunity (Y1)  show linked  show all

Link ID:  Link #0

CRM Processes: Opportunity Ma... ✘

Record Filter:

Sorting: 6,9

Node Menu:

Widget Options:

Relation Name:

Info Area Label:

Info Area Filter:

Record Count: 15

Search&List: Y1-FI

Form:

---

**Node Settings**

Check Children

Expand

Hide Records

Show Count

Company Related

Readonly

No Records

Disable Tweaks

Expand Records

Hide Groupnode

---

**Record Settings**

Context Menu:

Table Caption: Y1\_FI\_Tree

Widget Options:

Expand: Y1Tree

Form:

The last thing to do is to change the menu's 'ID\_NET\_OPPORTUNITY\_NEW' process to 'NewOpportunity':

Menu 'ID\_NET\_OPPORTUNITY\_NEW'

✓ Save ✗ Delete

Text: New Opportunity

Configuration: Demo\_OppBasic

CRM Processes: Opportunity (60000020)

Info Area: Y1

QuickLink Context: <No Image>

Image: <No Image>

Visible:

Action: Process

Description: New Opportunity

**Referred by**

Menus: ID\_NET\_PROCESSES

Expand: no reference

SearchAndList: no reference

TreeView: no reference

Button: no reference

**Action for Menu ID\_NET\_OPPORTUNITY\_NEW**

Action Template: Process

Executes a process.

Pass arguments as an object

**Input Arguments**

! name: NewOpportunity

! processState: RequireEnabled

createNewTab: true

+ New Argumentname

**Output Arguments**

+ New Argumentname

## Rights Settings

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

## Inheritance Settings

**Rights**

Access Rights: Demo\_OppBasic

Extends:

Global Extension:

Local Extension:

Inheritance:

Override station rights:

Override group rights:

Override rep rights:

Further Settings...:

Further Settings inheritance:

| Info Area   | Deny Access | Deny New | Deny Update | Deny Deletion | Condit. Access | Condit. New | Condit. Update | Condit. Delete | Implicit Hierarch | Create Default | Fields | Cond. Fields                        | Triggers | Wor |
|-------------|-------------|----------|-------------|---------------|----------------|-------------|----------------|----------------|-------------------|----------------|--------|-------------------------------------|----------|-----|
| Opportunity |             |          |             |               |                |             |                |                |                   |                |        | <input checked="" type="checkbox"/> |          |     |
| Competitor  |             |          |             |               |                |             |                |                |                   |                |        |                                     |          |     |

Further Settings...

View: Rights Settings

View: Inheritance Settings

Display info area abbreviations

Link with parent rights using AND

## Rights Settings

**Rights**

Access Rights: Demo\_OppBasic

Extends:

Global Extension:

Local Extension:

Inheritance:

Override station rights:

Override group rights:

Override rep rights:

Further Settings...:

Further Settings inheritance:

| Info Area   | Deny Access | Deny New | Deny Update | Deny Deletion | Condit. Access | Condit. New | Condit. Update | Condit. Delete | Implicit Hierarch | Create Default | Fields | Cond. Fields                        | Triggers | Wor |
|-------------|-------------|----------|-------------|---------------|----------------|-------------|----------------|----------------|-------------------|----------------|--------|-------------------------------------|----------|-----|
| Opportunity |             |          |             |               |                |             |                |                |                   |                |        | <input checked="" type="checkbox"/> |          |     |
| Competitor  |             |          |             |               |                |             |                |                |                   |                |        |                                     |          |     |

Further Settings...

View: Rights Settings

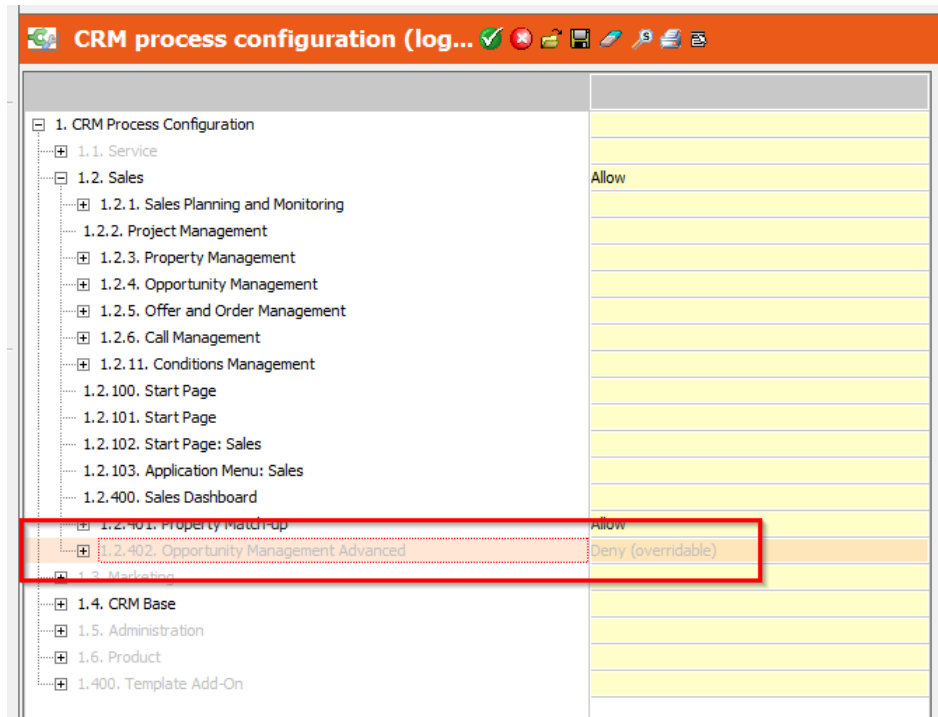
View: Inheritance Settings

Display info area abbreviations

Link with parent rights using AND

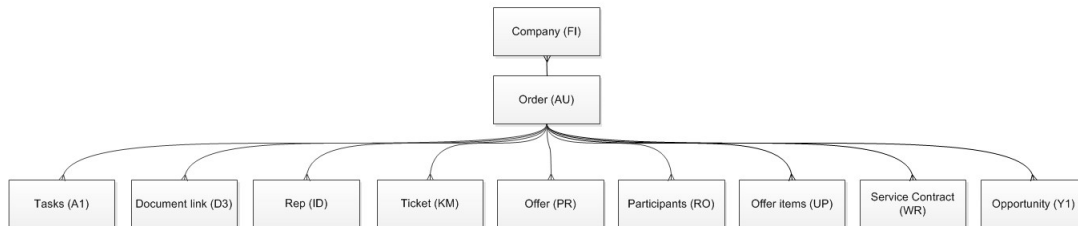
This needs to be done so that the fields in the opportunity can be edited no matter what the level of the opportunity is currently in.

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:

**Parameter 'StartPage'**
✕

Parameter Type: **Combobox**  
 Display Name: Start page   
 CRM Process: all

**Parameter Options**

Use Options from another Parameter  
 Use Options from an external source  
 Options:

|   |   | Value                                      | Display Text        |   |
|---|---|--------------------------------------------|---------------------|---|
| ✕ | / | ID_NET_COMPANY_SEARCH                      | Companies           |   |
| ✕ | / | ID_NET_APPOINTMENT_SEARCH                  | Activities          |   |
| ✕ | / | ID_NET_CALENDAR                            | Calendar            |   |
| ✕ | / | ID_NET_OBJECTS                             | Properties          |   |
| ✕ | / | ID_NET_PERSON_SEARCH                       | Persons             |   |
| ✕ | / | ID_FAVORITES                               | Favorites           |   |
| ✕ | / | ID_NET_DAYPLANNING                         | Day & Week Planning |   |
| ✕ | / | ID_NET_STARTPAGE_CONSTRUCTION              | Construction Home   |   |
| ✕ | / | ID_NET_STARTPAGE_GENERAL                   | Start Page          |   |
| ✕ | / | ID_NET_STARTPAGE_SERVICE                   | Service             |   |
| ✕ | / | ID_NET_SDK                                 | SDK                 |   |
| ✕ | / | ID_NET_Startpage_Sales                     | Sales Startpage     |   |
| + |   |                                            |                     |   |
| + |   | ID_NET_ORGCHART (Organizational Hierarchy) |                     | ▼ |

TE\_ISI

Therefore a new application menu action has been added:

|                   |                                                                                                                                                            |                                                                                                                                                                         |
|-------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Text              | Sales Startpage                                                                                                                                            |                                                                                      |
| Configuration     | <b>TE_ISI</b>                                                                                                                                              |                                                                                                                                                                         |
| CRM Processes     | all                                                                                                                                                        |                                                                                      |
| Info Area         |                                                                                                                                                            |                                                                                                                                                                         |
| QuickLink Context |                                                                                                                                                            |                                                                                                                                                                         |
| Image             | <No Image>                                                                                                                                                 |                                                                                      |
|                   | <input checked="" type="checkbox"/> Visible                                                                                                                |                                                                                                                                                                         |
| Action            | ShowForm                                                                                                                                                   |   |
| Description       | Application-Menu-Action:<br>ID_NET_Startpage_Sales<br>History: GSw,15.10.2012 changed text to<br>"Sales Startpage" - this will be displayed<br>as TAB Name |                                                                                                                                                                         |

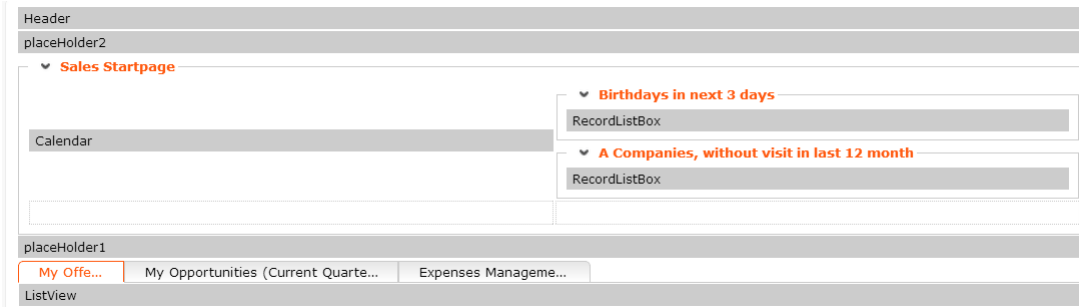
**Referenced by**

|               |                         |
|---------------|-------------------------|
| Menus         | <u>ID_NET_PROCESSES</u> |
| Expand        | no reference            |
| SearchAndList | no reference            |
| TreeView      | no reference            |

This menu action is lodged with a ShowForm action which calls the “TE\_Startpage\_Sales” form.

### “TE\_Startpage\_Sales” Form

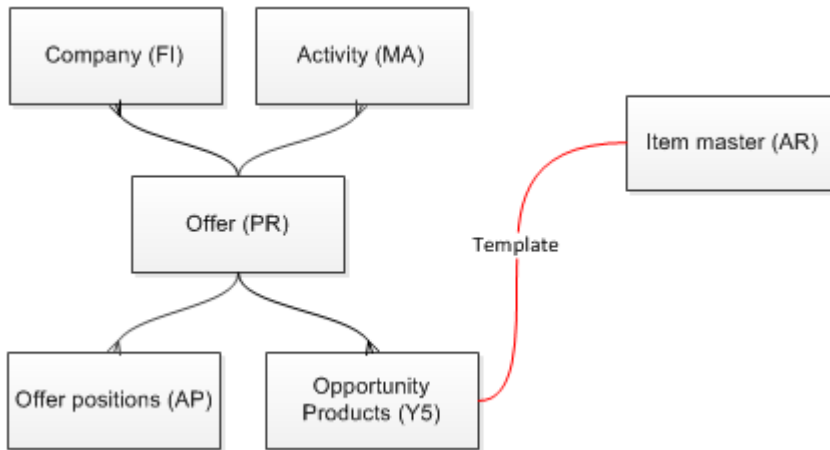
Form structure:



- 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

**Menu TE\_ID\_NET\_WonLostMainSecondaryOffer**

✓ Save ✗ Delete

Text: Won/Lost Main and Secondary Offers

Configuration: **TE\_ISI**

CRM Processes: Execute Analysis (50002230) ✗

Info Area: \_\_\_\_\_

QuickLink Context: \_\_\_\_\_

Image: Analysis

Visible

Action: ShowForm ✗

Description: Application-Menu-Action: TE\_ID\_NET\_WonLostMainSecondaryOffer  
History:

**Referenced by**

Menus: ID\_NET\_QUERIES\_AND\_STATISTICS

Expand: no reference

SearchAndList: no reference

TreeView: no reference

Used to call the respective form. The menu entry is directly referenced in the application menu "ID\_NET\_QUERIES\_AND\_STATISTICS".

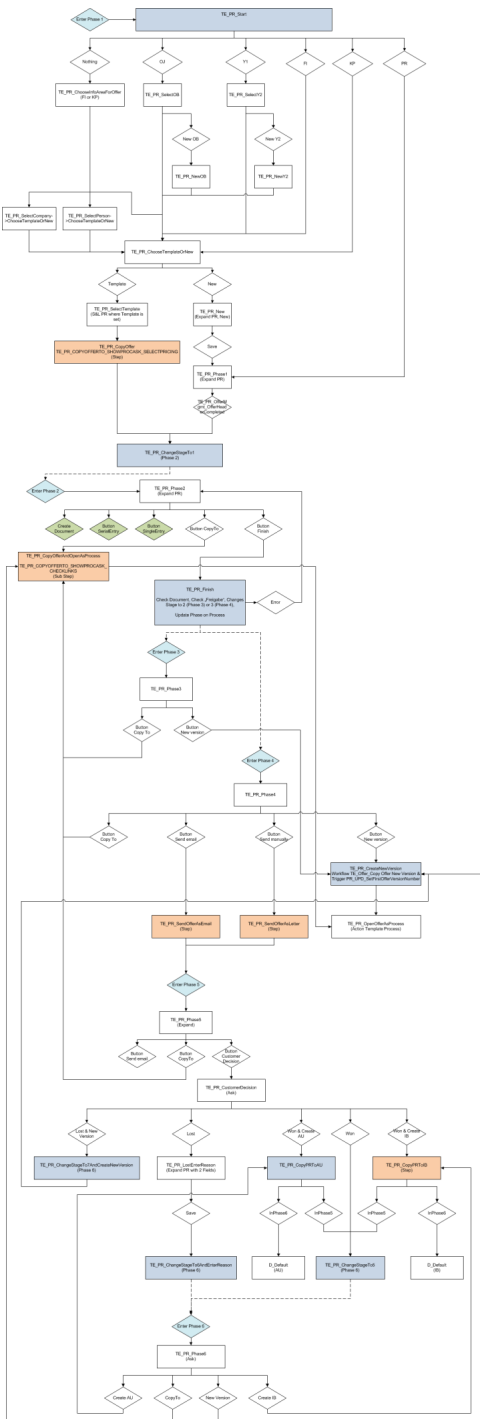


The screenshot shows a configuration window for an action. At the top, the title is "Action for Menu TE\_ID\_NET\_WonLostMainSecondaryOffer". Below the title, the "Action Template" is set to "ShowForm". Underneath, it says "Shows a Form" and there is an unchecked checkbox for "Pass arguments as an object" with a help icon. The "Input Arguments" section contains one argument: "FormName" with a value of "TE\_WonLostMainSecondaryOffer" and a dropdown arrow. Below it is a plus sign and a text input field labeled "New Argumentname". The "Output Arguments" section also contains a plus sign and a text input field labeled "New Argumentname".

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_WithoutChildren | 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_SelectPricing        | Used in Phase 1                                                            |
| 1     | TE_PR_OfferMgmt_ChooseInfoAreaForOffer | 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_CustomerDecision       | Used in phase 5                                                            |
| 3     | TE_PR_SendOfferAsEmail_CreateDcoument  | Shown if there is no document 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_ChangeStageTo6AndEnterReason      | Changes the state of the offer to "6 - Closed - Lost"                                                                                                                                                        |
| 5     | TE_PR_Offer-Mgmt_ChangeStageTo7AndCreateNewVersion | Changes the state of the offer to "7 - Closed - Versioning"                                                                                                                                                  |
| 1     | TE_PR_OfferMgmt_ChooseInfoAreaForOffer             | 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_CopyOffer                          | Calls a sub step to copy the offer to the given "link" (KP or FI). Note: sub step "TE_PR_CopyOfferTo_ShowProcAsk_SelectPricing" is part of process "TE_PR_CopyOfferTo".                                      |
| 1-6   | TE_PR_OfferMgmt_CopyOfferAndOpenAsProcess          | 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_CreateNewVersion                   | Creates a new version of an offer. (note this is actually a duplicate of step 'TE_PR_CreateNewOfferVersion_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_SelectOB                             | 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 created.                                                                                                                                                                                                                                                                                                                                                                                |
| 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_OfferMgmt_ChooseTemplateOrNew" 2.) or click on the "New" Button in the header to be forwarded to further steps for creating a new OpportunityParticipant |
| 4   | TE_PR_OfferMgmt_SendOfferAsEmail                     | 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 according to its info area.                                                                                                                                                                                                                                                                                                                                                                  |
| 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).                                                                                                                                                                                                                                                                                                                             |

|     |                             |                                                                                                        |
|-----|-----------------------------|--------------------------------------------------------------------------------------------------------|
| 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_CreateOfferDocument_QueryState              |
| 4   | TE_A_PR_SendOfferAsEmail_QueryState                 |
| 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 Transmission  |
| 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:



Startpage > Menus

### Menu TE\_A\_PR\_CreateNewOfferVersion\_QueryState

✓ Save ✗ Delete

Text <No Text>

Configuration **TE\_ISI**

CRM Processes Offer and Order Management (70000400) ✗

Info Area

QuickLink Context

Image <No Image>

Visible

Action JavaScript ✗

Description Action to set button  
"TE\_PR\_CreateNewOfferVersion" visible or not  
(depends on offer stage (9))

---

**Referenced by**

- Menus
- Expand
- SearchAndList
- TreeView

---

**Action for Menu TE\_A\_PR\_CreateNewOfferVersion\_QueryState**

Action Template **JavaScript**

Calls a JavaScript function.

Pass arguments as an object

Input Arguments

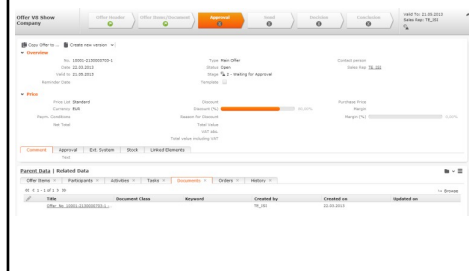
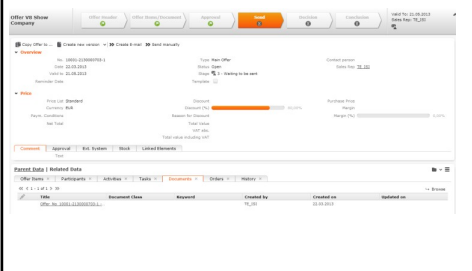
- ! \$function u8.services.te\_offerManagement["Q...
- ✗ offerStages 10001\_108\_3,10001\_108\_1
- + New Argumentname

Output Arguments

- + New Argumentname

• 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:

Parameter 'StartPage'

Parameter Type: **Combobox**

Display Name: Start page

CRM Process: all

**Parameter Options**

Use Options from another Parameter  
 Use Options from an external source  
 Options:

|       | Value                          | Display Text         |
|-------|--------------------------------|----------------------|
| X ↓   | ID_NET_COMPANY_SEARCH          | Companies            |
| X ↑ ↓ | ID_NET_APPOINTMENT_SEARCH      | Activities           |
| X ↑ ↓ | ID_NET_CALENDAR                | Calendar             |
| X ↑ ↓ | ID_NET_OBJECTS                 | Properties           |
| X ↑ ↓ | ID_NET_PERSON_SEARCH           | Persons              |
| X ↑ ↓ | ID_FAVORITES                   | Favorites            |
| X ↑ ↓ | ID_NET_DAYPLANNING             | Day & Week Planning  |
| X ↑ ↓ | ID_NET_STARTPAGE_CONSTRUCTION  | Construction Home    |
| X ↑ ↓ | ID_NET_STARTPAGE_GENERAL       | Start Page           |
| X ↑ ↓ | ID_NET_STARTPAGE_SERVICE       | Service              |
| X ↑ ↓ | ID_NET_SDK                     | SDK                  |
| X ↑ ↓ | ID_NET_Startpage_Sales         | Sales Startpage      |
| X ↑   | TE_ID_NET_STARTPAGE_Management | Management Startpage |

TE\_ISI

Save Close

A new “TE\_ID\_NET\_STARTPAGE\_Management” action has been created to call the new start page:

Menu **TE\_ID\_NET\_STARTPAGE\_Management**

Save Delete

Text: Sales Startpage

Configuration: **TE\_ISI**

CRM Processes: all

Info Area:

QuickLink Context:

Image: <No Image>

Visible:

Action: **ShowForm**

Description: Action to call the Management Startpage

**Action for Menu TE\_ID\_NET\_STARTPAGE\_Management**

Action Template: **ShowForm**

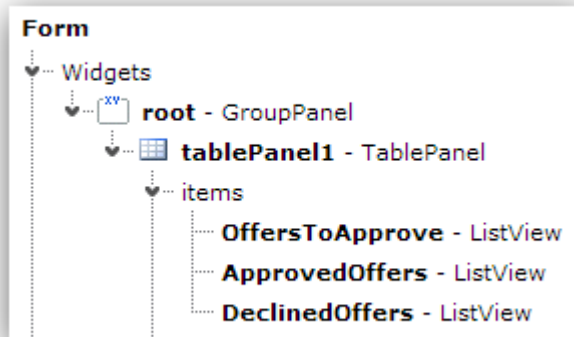
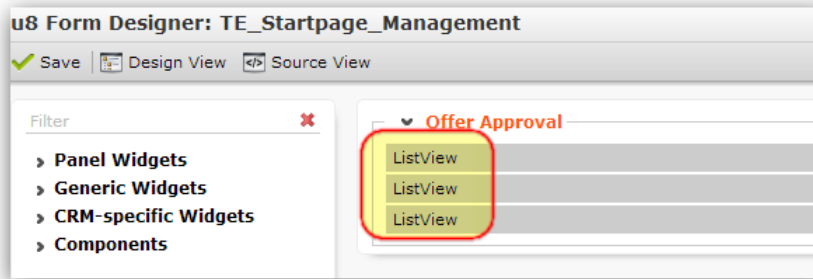
Shows a Form:  Pass arguments as an object

Input Arguments:

|            |                         |
|------------|-------------------------|
| ! FormName | TE_Startpage_Management |
| HeaderName | TE_Startpage_Management |

+ New Argumentname

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

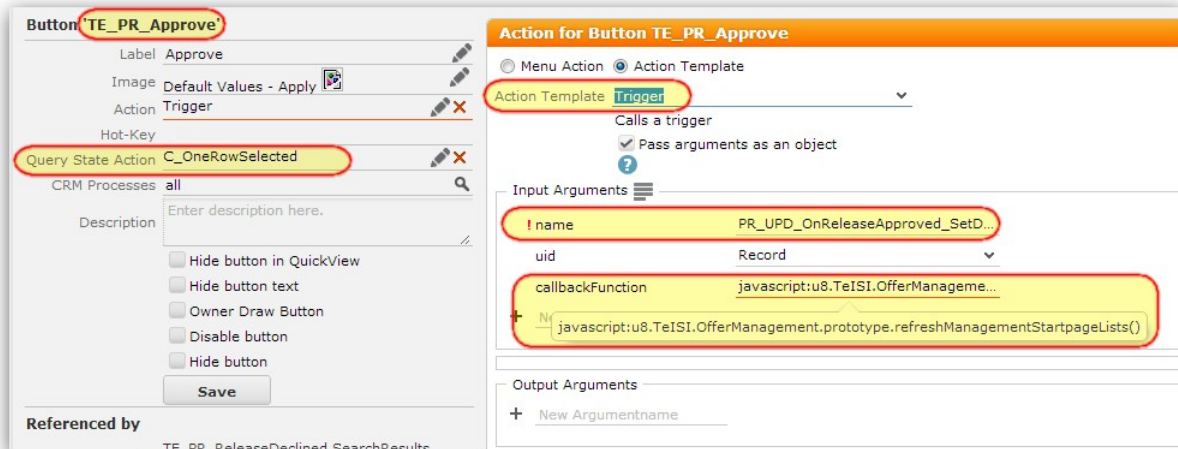
TE\_PR\_ReleaseDeclined

TE\_PR\_ReleaseRequired

Used buttons:

TE\_PR\_Approve

TE\_PR\_Decline



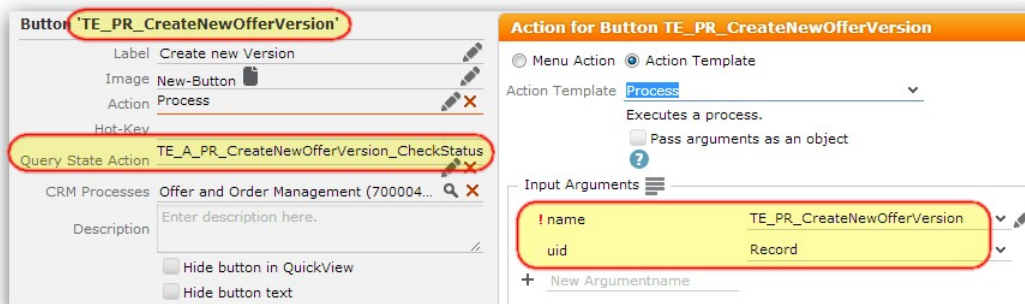
Used triggers:

- PR\_UPD\_OnReleaseApproved\_SetData
- PR\_UPD\_OnReleaseDeclined\_SetData

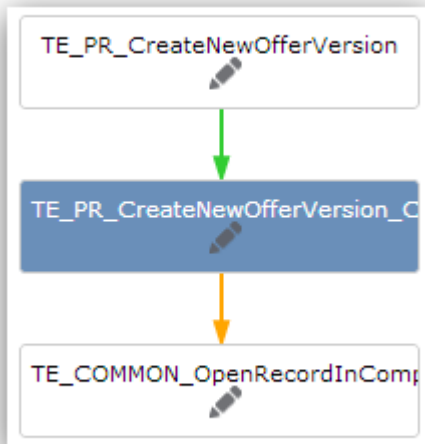
The JavaScript callback function is located in the “offermanagement.js” file and simply refreshes the 3 lists on the start page.

## 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\_CreateNewOfferVersion\_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 “fixedFieldValues” and “defaultsUid” parameters.

**Button "TE\_PR\_SearchOfferVersions"**

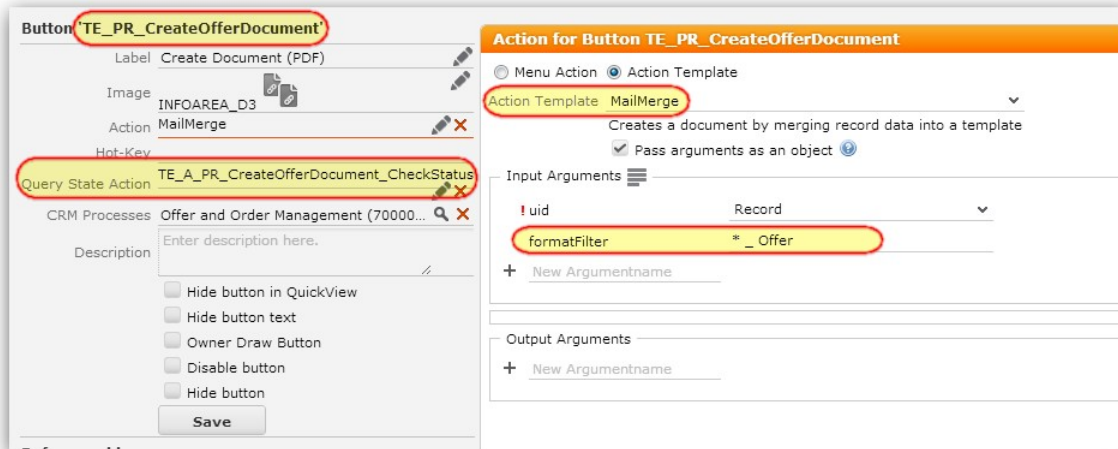
- Label: Offer Versions
- Image: ShowAll
- Action: Search
- Hot-Key:
- Query State Action: <No Action>
- CRM Processes: Offer and Order Management (7000...)
- Description: Enter description here.
- Options: Hide button in QuickView, Hide button text, Owner Draw Button, Disable button, Hide button
- Save
- Referenced by: Header PR\_Expand

**Action for Button TE\_PR\_SearchOfferVersions**

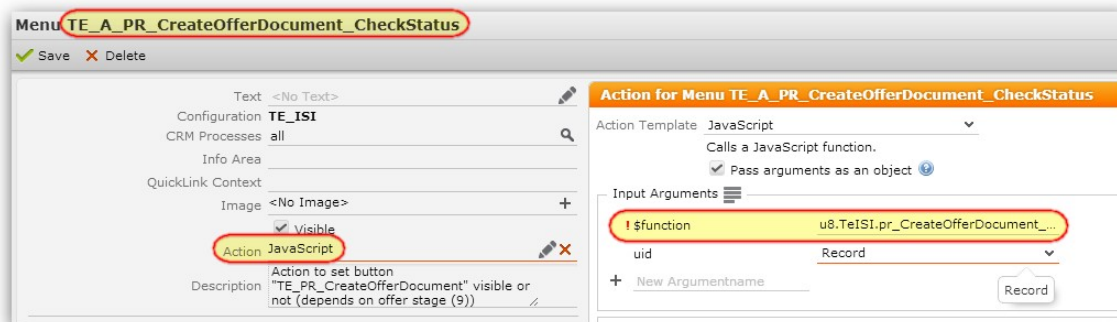
- Menu Action:  Menu Action  Action Template
- Action Template: Search
- Searches for records and displays them in the list
- Pass arguments as an object:
- Input Arguments:
  - fixedFieldValues: 5026:PR.5026
  - searchAndListName: TE\_PR\_OfferVersions
  - createNewTab: true
  - showSearch: false
  - selectionMode: Multi
  - autoSearch: true
  - defaultsUid: Record
  - autoExpandOnSingleHit: false
- + New Argumentname

### Create Offer Document

A new Button called “TE\_PR\_CreateOfferDocument” has been created.



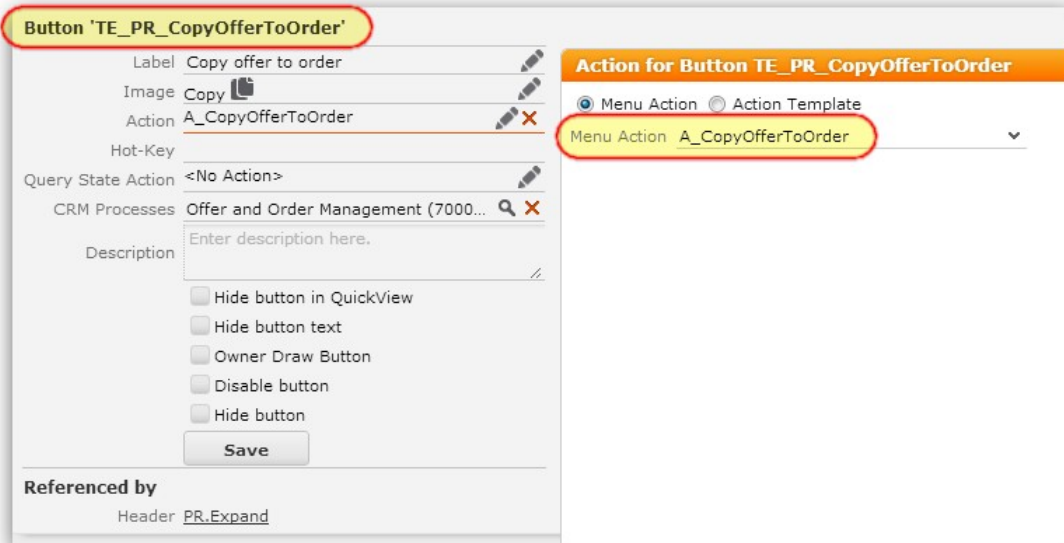
The “TE\_A\_PR\_CreateOfferDocument\_CheckStatus” query state action is used to set the button active or inactive:



Calling the “pr\_CreateOfferDocument\_Button\_CheckStatus”  
(web\scripts\te.isi\te.isi.js) function.

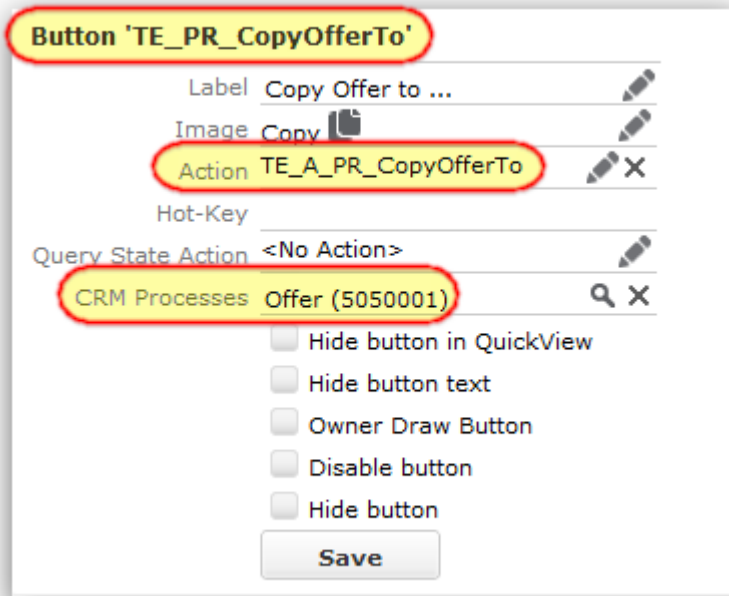
## Copy Offer to Order

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.



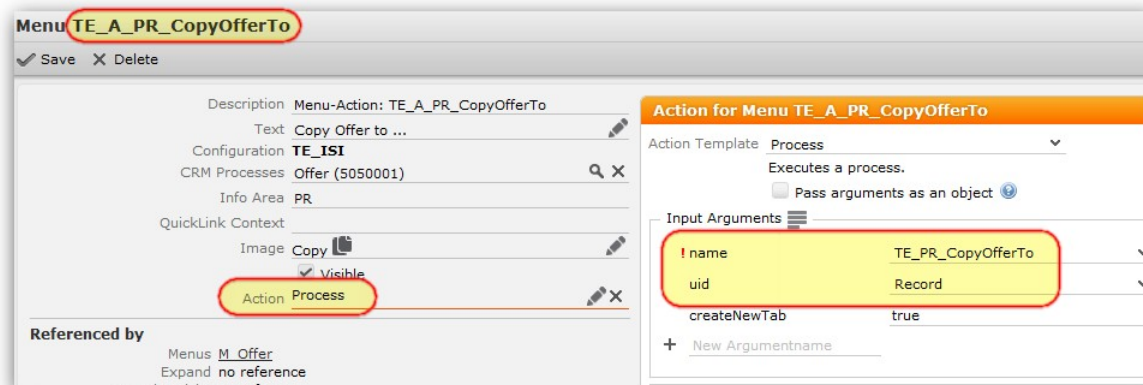
### Copy Offer to

New "TE\_PR\_CopyOfferTo" button which calls a menu action

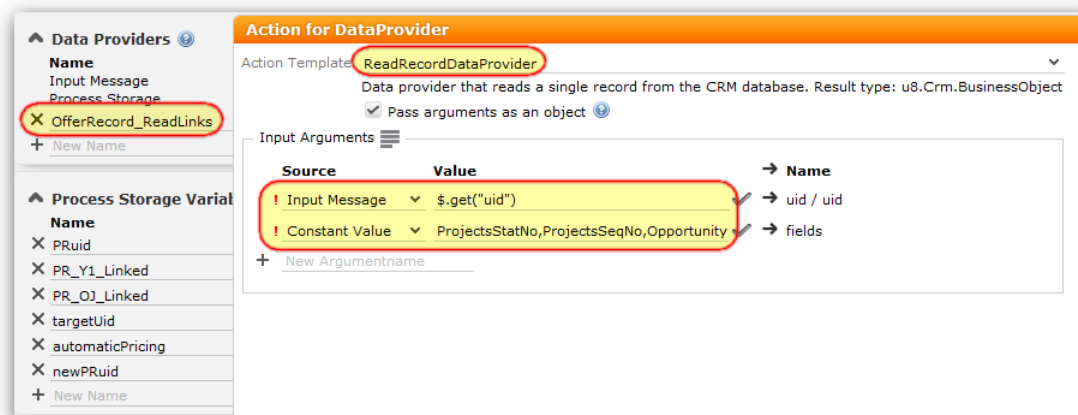


This menu action calls the new "TE\_PR\_CopyOfferTo" process:





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:

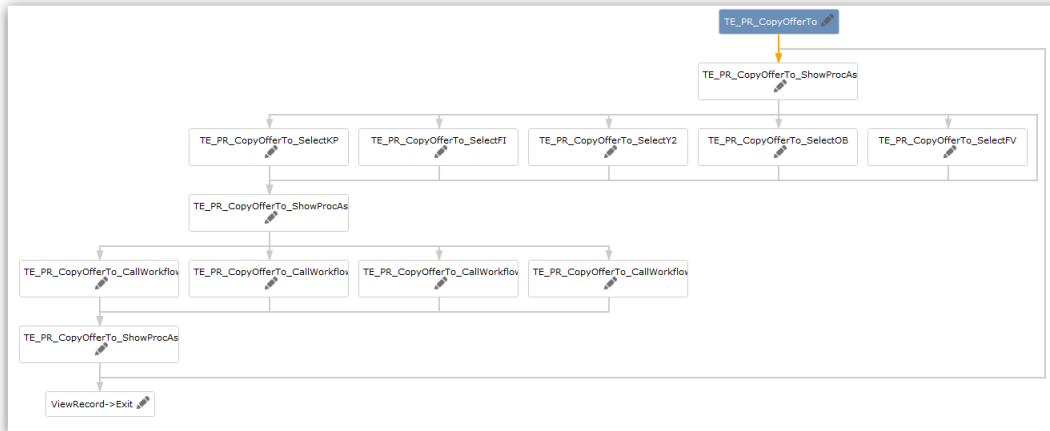
- TE\_PR\_CopyOfferTo\_CheckLinks (display “copy to” buttons: e.g.: company, person, favorites ...)
- TE\_PR\_CopyOfferTo\_CopyAgain (prompts the user to copy the offer again to another target)
- TE\_PR\_CopyOfferTo\_SelectPricing (prompts the user to enable or disable pricing)

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 of 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

| Validation | Source        | Condition                                                 | Error Text                                          |
|------------|---------------|-----------------------------------------------------------|-----------------------------------------------------|
| X          | Step          | $(\$.get("uid").infoAreaId == "FI")    (\$.get("uid").in$ | It's not possible to select this infoarea. Please s |
| +          | New Condition |                                                           |                                                     |

Step which calls a workflow:

**Action**

Action Template: **Workflow**

Executes a workflow

Pass arguments as an object

End process with this action

**Input Arguments**

| Source          | Value                                                                          | Name       |
|-----------------|--------------------------------------------------------------------------------|------------|
| Constant Value  | TE_Offer_Copy Offer from Template to Opportunity                               | name       |
| Process Storage | $\$.get("PRuid")$                                                              | uid        |
| Process Storage | $\$.get("targetUid")$                                                          | uid2       |
| Process Storage | $[ \{ name: "automaticCalculation", values: [\$.get("automaticPricing")] \} ]$ | parameters |

**Validation**

| Source | Condition     | Error Text |
|--------|---------------|------------|
| +      | New Condition |            |

**Output Arguments**

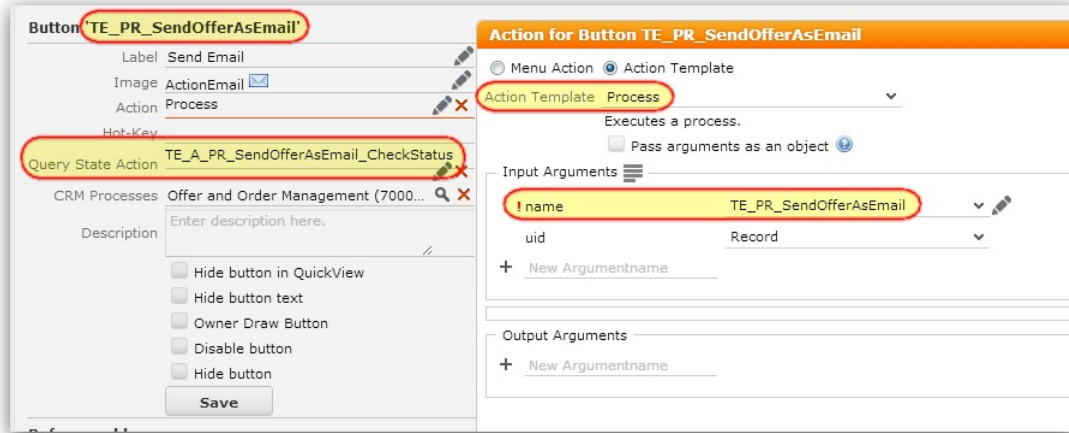
| Value                             | Target          | Name     |
|-----------------------------------|-----------------|----------|
| $\$.get("changedRecords")[0].uid$ | Process Storage | newPRuid |

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

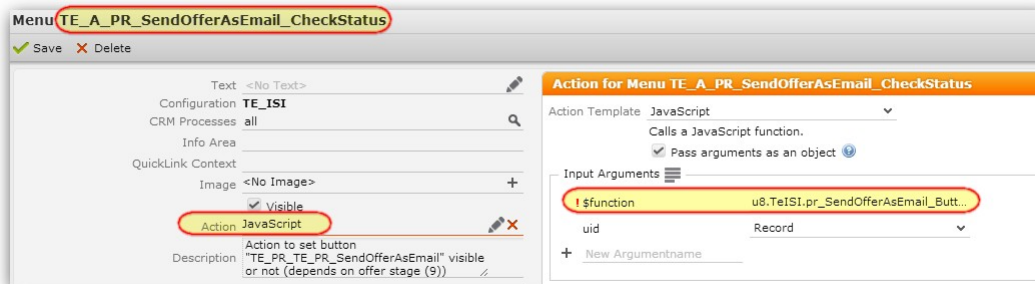
Using the output arguments we are waiting to get the response of the workflow and receive the new offer records uid.

### 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.

| Data Providers            |  | Action                 |
|---------------------------|--|------------------------|
| Name                      |  |                        |
| Input Message             |  |                        |
| Process Storage           |  |                        |
| X OfferRecord_ReadCompany |  | ReadRecordDataProvider |
| X OfferRecord_ReadPerson  |  | ReadRecordDataProvider |
| + New Name                |  |                        |

| Process Storage Variables |                         |                                         |
|---------------------------|-------------------------|-----------------------------------------|
| Name                      | Data Provider           | Value                                   |
| X PRuid                   | Input Message           | ▼ \$.get("uid")  null                   |
| X Efluid                  | OfferRecord_ReadCompany | ▼ \$.uid                                |
| X KPLinked                | OfferRecord_ReadPerson  | ▼ (\$.pet("CoPe") != "") ? true : false |
| + New Name                |                         |                                         |

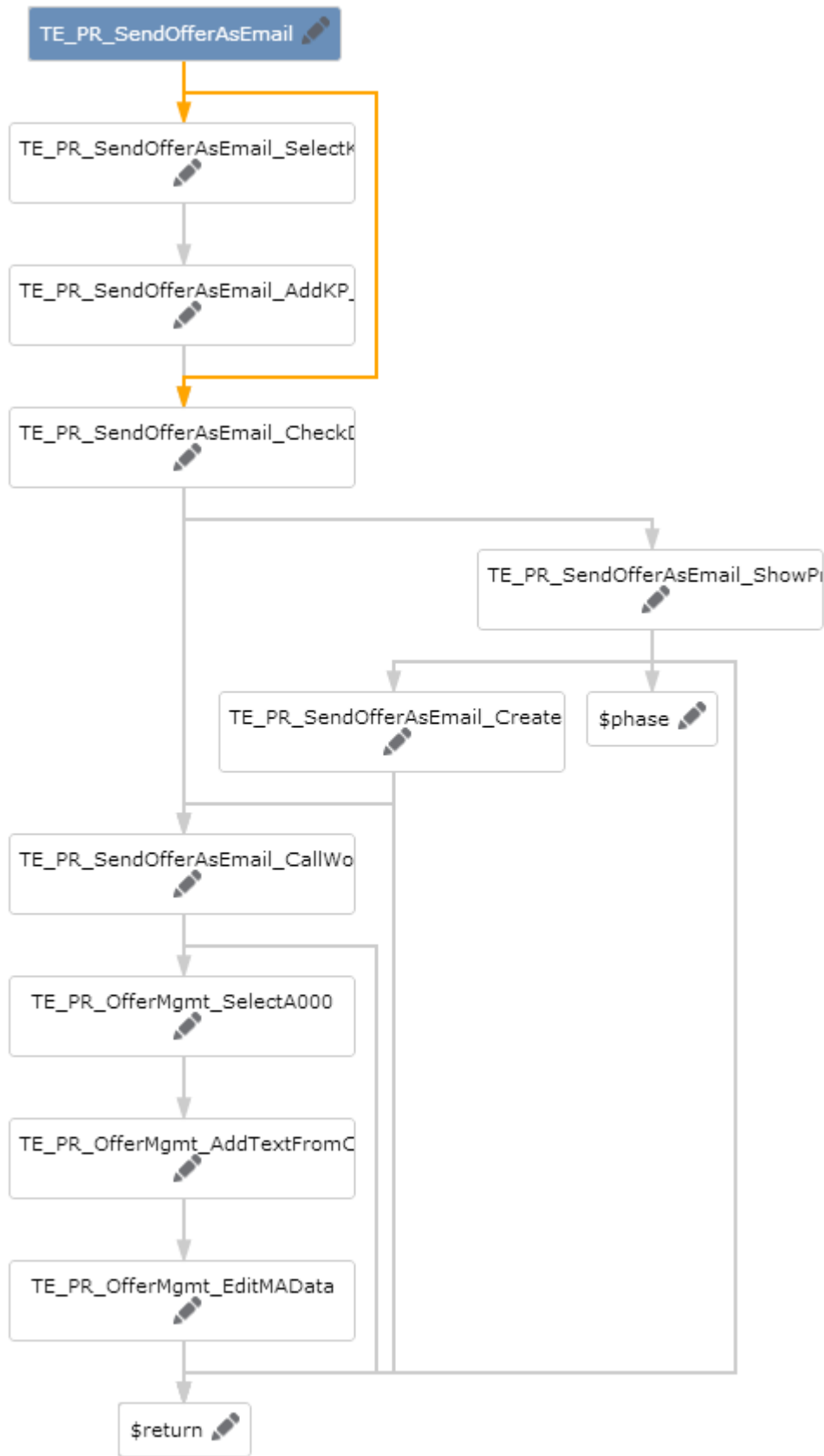
Used process steps:

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:



## 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 appro  | 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_LPR_SetItemMasterFields                       |                    |                 |     | ✓   |        |
| 2                   | AP_LPR_Calculate_Price                           |                    | ✓               | ✓   |     |        |
| 3                   | AP_LPR_Set_DiscountLimit                         |                    |                 | ✓   |     |        |
| 4                   | PR_LPR_SetRelease_Required                       |                    | ✓               | ✓   |     |        |
| 5                   | AP_NEW_Create New Offer Position From Copied Off |                    | ✓               |     | ✓   |        |
| 6                   | AP_LPR_Check_Endtime_later_starttime             |                    |                 |     | ✓   |        |
| 7                   | AP_LPR_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:

```

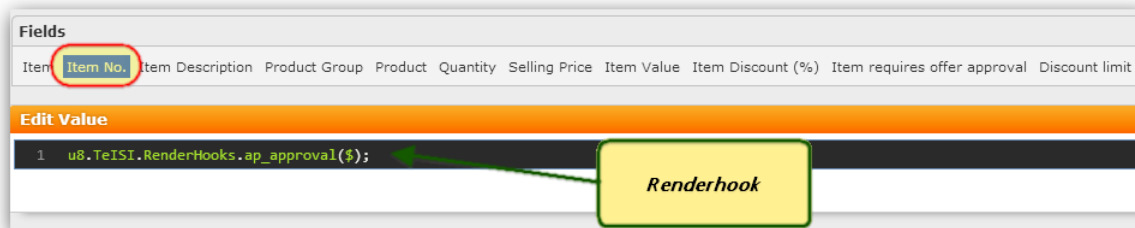
/// call: u8.TeISI.RenderHooks.pr_discount($);
/// call: u8.TeISI.RenderHooks.pr_value($);
/// call: u8.TeISI.RenderHooks.ap_discount($);
/// call: u8.TeISI.RenderHooks.ap_approval($);
pr_discount: function (object) {
 var prDiscount = u8.services.typeConverter.toBoolean(object.getValue(5039));
 if(prDiscount == 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).





The screenshot shows the SAP configuration interface for a field. The field name is 'Item requires offer approval'. In the 'Field Attributes' section, the 'Hide Field' checkbox is checked and highlighted with a red circle.

## 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 OI 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.St 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 screenshot shows the configuration interface for a button. On the left, the 'Button' configuration is visible, including the label 'Sales Planning', image 'INFOAREA\_FC', and action 'Process'. The right pane shows the 'Action for Button TE\_FC\_SalesPlanning' configuration, where the 'Action Template' is set to 'Process'. The 'Input Arguments' section is populated with:
 

- ! name: TE\_FC\_SalesPlanning
- ! processState: RequireEnabled
- createNewTab: true

 There are also fields for 'New Argumentname' under both input and output arguments sections.

The process contains 4 phases:

The screenshot shows the configuration interface for a process. The 'Process Phases' section is expanded, showing four phases: 'Preparation', 'Detail Planning', 'Review', and 'Acceement'. Below this, the 'Data Providers' section lists:
 

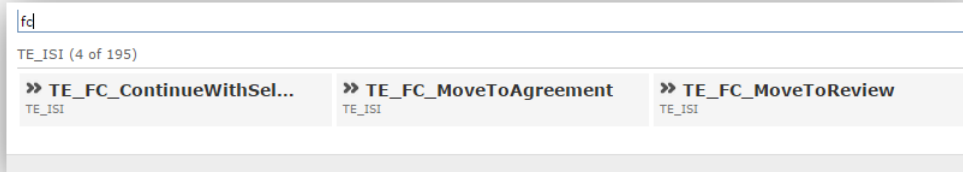
- Input Message: Process Storage
- SalesPlanningDataProvider: TE\_FC\_SalesPlanning\_DataProvider

 The 'Process Storage Variables' section is also expanded, showing:
 

- generateduids: none
- phase: 1

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

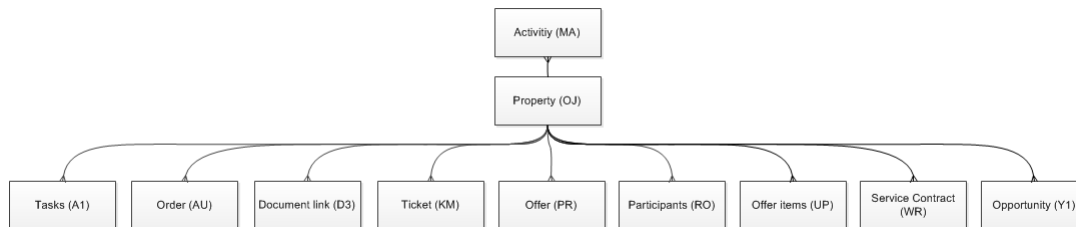
These three buttons are used to change the phase within the process:

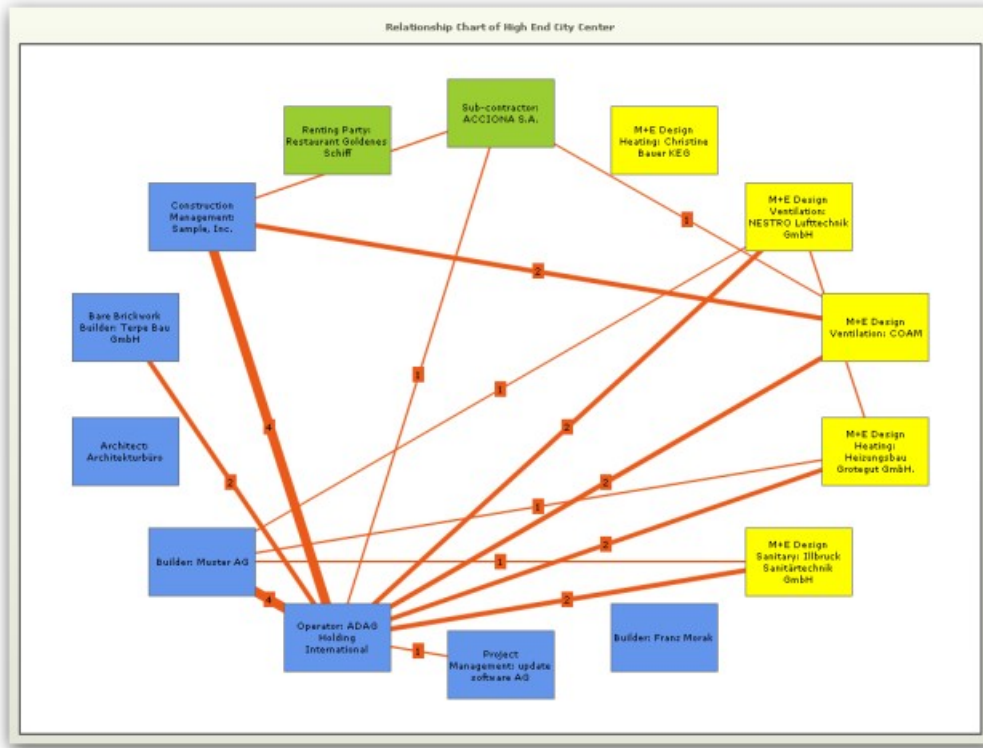


Furthermore a javascript is used to create the records for the next year (step from phase1 to phase2) File location: \web\scripts\te.isi\processes\TE\_FC\_SalesPlanning.js

## Property

Learn to manage property portfolio and run analysis.





NewTE\_OJ\_ParticipantRelationsReportpagewhichcallsthe“relationshipDiagram.aspx” file.

**Action Template** 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: _____   |
| X Description: RelationshipDiagram   |                        |                  |
| Table: uid                           | Type: Record - Must    | Record-ID: _____ |
| X Description: <infoarea>;<recordID> |                        |                  |
| Name: createNewTab                   | Type: Value - Optional | Default: true    |
| X 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                        | ID   | Name                        | Type                 | Reference                         | Catalogue | OB Column | Time stamp | Length |
|------|-----------------------------|------|-----------------------------|----------------------|-----------------------------------|-----------|-----------|------------|--------|
| U000 | Knowledge Base              | 4001 | U014-StaNo                  | snq(2byte)           |                                   |           | ID        |            | 4      |
| U001 | Contact Time                | 4002 | U014-SerNo                  | ino(4byte)           |                                   |           | ID        |            | 9      |
| U002 | IMPORTCompany               | 4010 | Created on                  | date(4byte)          | Created at                        |           | NEW_DT    |            | 10     |
| U003 | IMPORTUserLogin             | 4011 | Updated on                  | date(4byte)          | Updated at                        |           | UPD_DT    |            | 10     |
| U004 | IMPORTPerson                | 4012 | ASTNR.                      | snq(2byte)           |                                   |           | NEW_SNO   |            | 4      |
| U005 | IMPORTContact               | 4013 | DELCD.                      | y/n                  |                                   |           | DEL       |            | 1      |
| U006 | IMPORTAdditionalAddress     | 4014 | COMCD.                      | y/n                  |                                   |           | COM       |            | 1      |
| U007 | IMPORTItemMaster            | 4015 | Created at                  | time(hh:mm:ss.00) TZ | Created on                        |           | NEW_DT    |            | 12     |
| U008 | IMPORTItemMasterText        | 4016 | Updated at                  | time(hh:mm:ss.00) TZ | Updated on                        |           | UPD_DT    |            | 12     |
| U009 | IMPORTOrders                | 5000 | OB_Constr. Proj. Particip   | snq(2byte)           | Link->(OB) Constr. Proj. Particip |           | ID_OB     |            | 4      |
| U010 | IMPORTOffers                | 5001 | OB_Constr. Proj. Particip   | ino(4byte)           | Link->(OB) Constr. Proj. Particip |           | ID_OB     |            | 9      |
| U011 | IMPORTBuildingprojects      | 5002 | Constr. Proj. Participant   | reference (table)    | Link->(OB) Constr. Proj. Particip |           |           |            | 60     |
| U012 | IMPORTPriceList             | 5003 | OB_1_Constr. Proj. Partic   | snq(2byte)           | Link(1)->(OB) Constr. Proj. Part  |           | ID_OB_1   |            | 4      |
| U013 | IMPORTActivities            | 5004 | OB_1_Constr. Proj. Partic   | ino(4byte)           | Link(1)->(OB) Constr. Proj. Part  |           | ID_OB_1   |            | 9      |
| U014 | Constr. Proj. Participant F | 5005 | Constr. Proj. Participant F | reference (table)    | Link(1)->(OB) Constr. Proj. Part  |           |           |            | 60     |
| U015 | IMPORTInvoices              | 5006 | Weighting (1-10)            | short int(2byte)     |                                   |           | F5006     |            | 5      |
|      |                             | 5007 | REF_OB_FI-StaNo             | reference (field)    | Link->(OB) Constr. Proj. Particip |           |           |            | 4      |
|      |                             | 5008 | REF_OB_FI-SerNo             | reference (field)    | Link->(OB) Constr. Proj. Particip |           |           |            | 9      |
|      |                             | 5009 | REF_OB_Company              | reference (field)    | Link->(OB) Constr. Proj. Particip |           |           |            | 60     |
|      |                             | 5010 | REF_OB_1_FI-StaNo           | reference (field)    | Link(1)->(OB) Constr. Proj. Part  |           |           |            | 4      |
|      |                             | 5011 | REF_OB_1_FI-SerNo           | reference (field)    | Link(1)->(OB) Constr. Proj. Part  |           |           |            | 9      |
|      |                             | 5012 | REF_OB_1_Company            | reference (field)    | Link(1)->(OB) Constr. Proj. Part  |           |           |            | 60     |
|      |                             | 5013 | FI_Company A StaNo          | snq(2byte)           | Link->(FI) Company: FI-StaNo      |           | ID_FI     |            | 4      |
|      |                             | 5014 | FI_Company A SerNo          | ino(4byte)           | Link->(FI) Company: FI-SerNo      |           | ID_FI     |            | 9      |
|      |                             | 5015 | Company A                   | reference (table)    | Link->(FI) Company                |           |           |            | 60     |
|      |                             | 5016 | OU_Constr. Proj. Overvie    | reference (table)    | Link->(OU) Constr. Proj. Overvie  |           |           |            | 60     |
|      |                             | 5017 | FI_1_Company B StaNo        | snq(2byte)           | Link(1)->(FI) Company: FI-StaNo   |           | ID_FI_1   |            | 4      |
|      |                             | 5018 | FI_1_Company B SerNo        | ino(4byte)           | Link(1)->(FI) Company: FI-SerNo   |           | ID_FI_1   |            | 9      |
|      |                             | 5019 | Company B                   | reference (table)    | Link(1)->(FI) Company             |           |           |            | 60     |
|      |                             | 5020 | OU_1_Constr. Proj. Over     | reference (table)    | Link(1)->(OU) Constr. Proj. Over  |           |           |            | 60     |
|      |                             | 5021 | OJ_OJ StaNo                 | snq(2byte)           | Link->(OJ) Construction Project   |           | ID_OJ     |            | 4      |
|      |                             | 5022 | OJ_OJ SerNo                 | ino(4byte)           | Link->(OJ) Construction Project   |           | ID_OJ     |            | 9      |
|      |                             | 5023 | Constr. Proj. Name          | reference (table)    | Link->(OJ) Construction Project   |           |           |            | 60     |
|      |                             | 5024 | Constr. Proj. Evaluation    | reference (table)    | Link->(OW) Constr. Proj. Evalu    |           |           |            | 60     |
|      |                             | 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                                                                                                            |

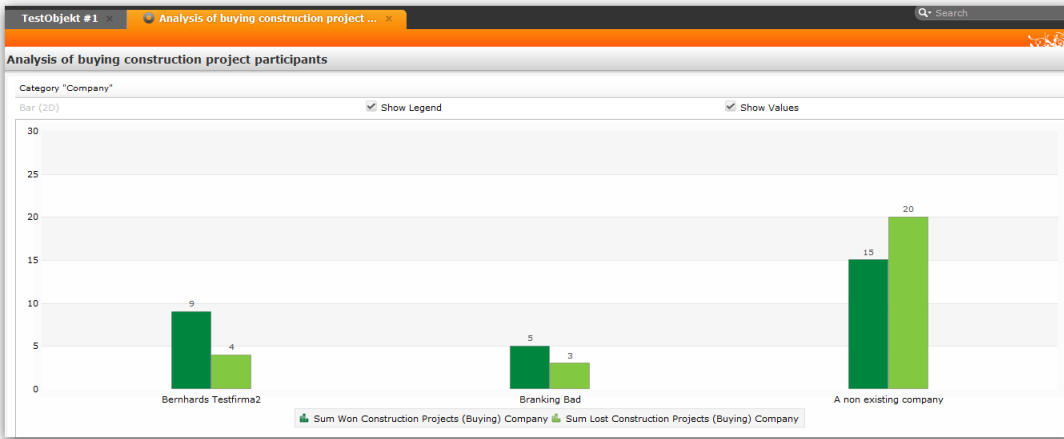
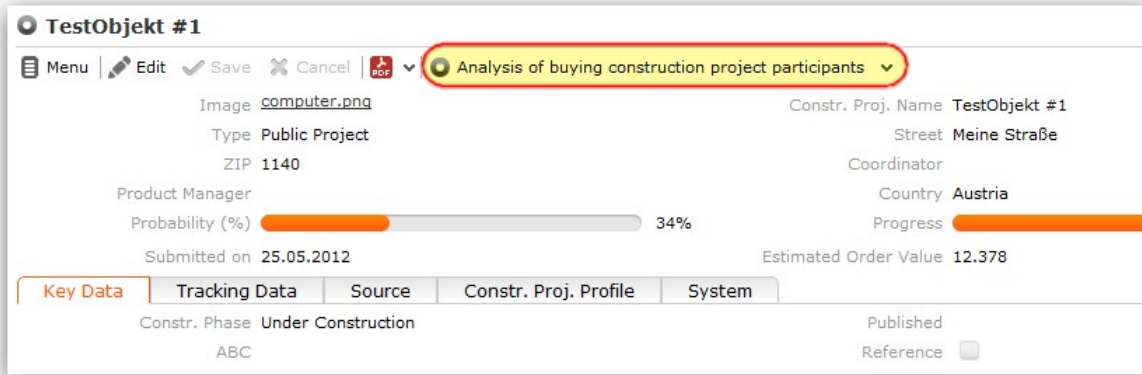
### Used Web Config Parameters:

| Tab #2: TE_OJ_OBRelReport               |                                                                                                                                                                                                                 |                                                      |
|-----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|
| Name                                    | Display Label                                                                                                                                                                                                   | Value                                                |
| TE_OJ_OBRelReport_Height                | Height of the companies in the report:                                                                                                                                                                          | <input type="text" value="70"/>                      |
| TE_OJ_OBRelReport_Width                 | Width of the companies in the report:                                                                                                                                                                           | <input type="text" value="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.:                                                                   | <input type="text" value="1,D3D3D3;2,9ACD32;3"/>     |
| TE_OJ_OBRelReport_RelInfoArea           | InfoArea shortcut of the relationship records:                                                                                                                                                                  | <input type="text" value="U014"/>                    |
| TE_OJ_OBRelReport_RelInfoArea_A_SerNoId | Field Id of Company A Serial Number:                                                                                                                                                                            | <input type="text" value="S014"/>                    |
| TE_OJ_OBRelReport_RelInfoArea_A_StaNoId | Field Id of Company A Station Number:                                                                                                                                                                           | <input type="text" value="S013"/>                    |
| TE_OJ_OBRelReport_RelInfoArea_B_SerNoId | Field Id of Company B Serial Number:                                                                                                                                                                            | <input type="text" value="S018"/>                    |
| TE_OJ_OBRelReport_RelInfoArea_B_StaNoId | Field Id of Company B Station Number:                                                                                                                                                                           | <input type="text" value="S017"/>                    |
| TE_OJ_OBRelReport_ConColor              | HEX-Color of the connection lines:                                                                                                                                                                              | <input type="text" value="E85A19"/>                  |
| TE_OJ_OBRelReport_ConStdStrength        | A relative value from 0 to 5, which changes the strength of the connectors:                                                                                                                                     | <input type="text" value="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: | <input type="text" value="../crm/tree.aspx?uid=FI"/> |

# Analysis

Learn about the queries that are used to run analysis.

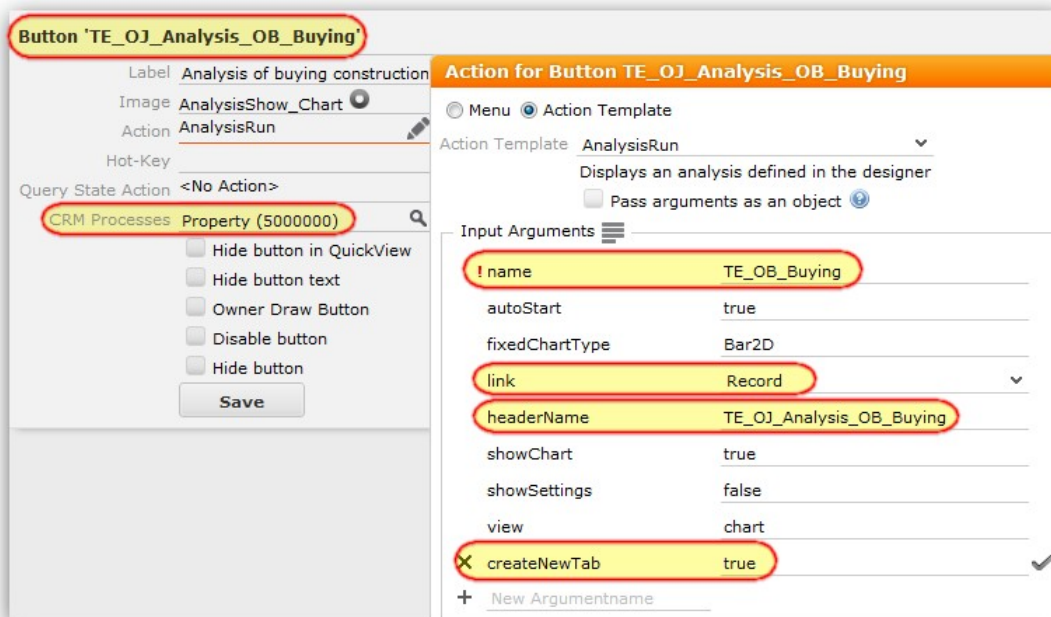
You can find the 2 new analyses in the expand header of a construction project. The 2 buttons have been added to the “OJ” and the “OJTree” header group.



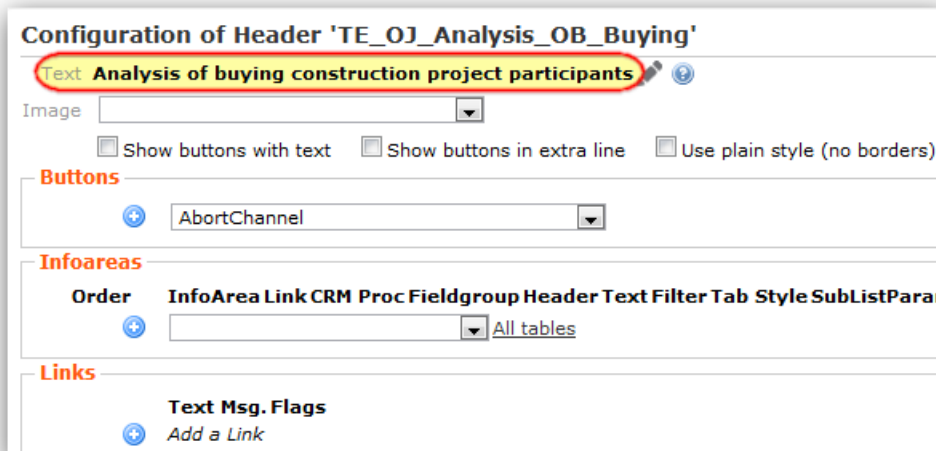
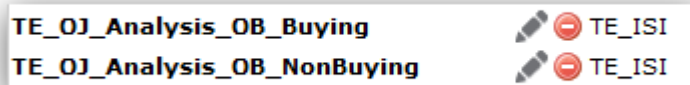
| Header Groups |     |                |
|---------------|-----|----------------|
| Name          |     | Configuration  |
| OJ            | + 🔍 | UPDATE_DEFAULT |
| OJTree        | + 🔍 | UPDATE_DEFAULT |

ButtonConfiguration:TE\_OJ\_Analysis\_OB\_BuyingTE\_OJ\_Analysis\_OB\_NonBuying





Special Headers which are Used:



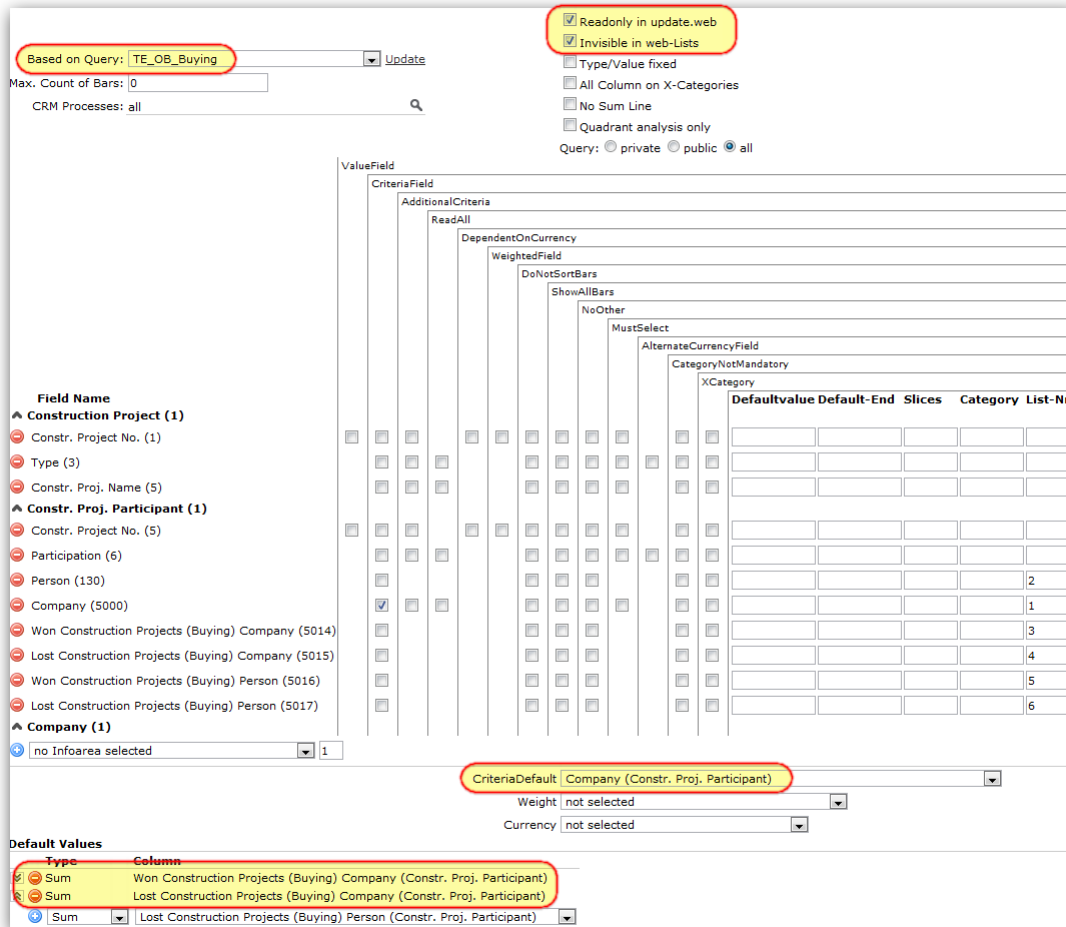
The Queries which are Used to Run the Analysis:

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

Configuration for Query 'TE\_OJ\_SalesFunnel'

New Date: 07.01.2013 14:38:17  
 Last Date: 15.01.2013 14:52:47  
 Readonly:  Readonly in update.web  
 Invisible in lists (within the application):   
 Filter: # default  enabled  disabled  
 CRM Processes: all

Description: Query to be used as basis for SalesFunnel Analysis  
 History: copied from TE\_MA\_Activities MBr 09.01.2013

Construction Project (10) X

Fields:  Constr. Proj. Name X,  Status X,  Estimated Order Value X,  Type X,  Country X,  ZIP X,  City X,  Project manager (Name) X,  Coordinator (Name) X,  Product Manager (Name) X,  ABC X,  Project manager X,  Coordinator X,  Product Manager X,  Expected Tendering Date X

Sort:  Status

Filters:  Construction Project Management type  Public Management (BASE) (3000) X,  Parameter / no value  
 Status =  CatCode = 0 X,  CatCode = 1 X,  CatCode = 2 X,  CatCode = 3 X,  CatCode = 4 X,  CatCode = 5 X,  Parameter

**Construction Start X, Submitted on X, Award Date X**

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

Configuration for Analysis 'TE\_OJ\_SalesFunnel'

Based on Query: TE\_OJ\_SalesFunnel Update

Max. Count of Bars: 0

CRM Processes: all

Description: Analysis of Property SalesFunnel  
 History: created MBr 11.01.2013

Query:  private  public  all

| Field Name                                                        | CriteriaField                       | AdditionalCriteria       | ReadAll                  | DependentOnCurrency      | WeightedField            | DoNotSortBars            | ShowAllBars              | NoOther                  | MustSelect               | AlternateCurrencyField   | Category/NotMandatory    | XCategory | Defaultvalue | Default-End | Slices | Category | List-Nr. | List-Width |
|-------------------------------------------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|-----------|--------------|-------------|--------|----------|----------|------------|
| <input checked="" type="checkbox"/> Construction Project (1)      | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |           |              |             |        |          |          |            |
| <input checked="" type="checkbox"/> Type (3)                      | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |           |              |             |        |          |          |            |
| <input checked="" type="checkbox"/> Constr. Proj. Name (5)        | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |           |              |             |        | 1        |          | %          |
| <input checked="" type="checkbox"/> Country (6)                   | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |           |              |             |        | 4        |          | %          |
| <input checked="" type="checkbox"/> ZIP (7)                       | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |           |              |             |        |          |          | %          |
| <input checked="" type="checkbox"/> City (8)                      | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |           |              |             |        |          |          | %          |
| <input checked="" type="checkbox"/> Project manager (15)          | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |           |              |             |        |          |          | %          |
| <input checked="" type="checkbox"/> Coordinator (16)              | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |           |              |             |        |          |          | %          |
| <input checked="" type="checkbox"/> Product Manager (17)          | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |           |              |             |        |          |          | %          |
| <input checked="" type="checkbox"/> Estimated Order Value (26)    | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |           |              |             |        | 5        |          | %          |
| <input checked="" type="checkbox"/> Construction Start (57)       | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |           |              |             |        |          |          | %          |
| <input checked="" type="checkbox"/> Submitted on (58)             | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |           |              |             |        |          |          | %          |
| <input checked="" type="checkbox"/> Award Date (59)               | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |           |              |             |        |          |          | %          |
| <input checked="" type="checkbox"/> Expected Tendering Date (103) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |           |              |             |        |          |          | %          |
| <input checked="" type="checkbox"/> Project manager (Name) (124)  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |           |              |             |        |          |          | %          |
| <input checked="" type="checkbox"/> Coordinator (Name) (125)      | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |           |              |             |        |          |          | %          |
| <input checked="" type="checkbox"/> Product Manager (Name) (126)  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |           |              |             |        |          |          | %          |
| <input checked="" type="checkbox"/> Status (5012)                 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |           |              |             |        | 2        |          | %          |
| <input checked="" type="checkbox"/> ABC (5022)                    | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |           |              |             |        | 6        |          | %          |

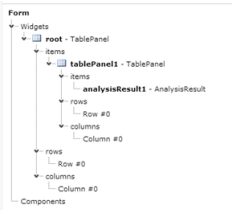
CriteriaDefault: Status (Construction Project)  
 Weight: not selected  
 Currency: not selected

Default Values  
 Type: Sum Column: Estimated Order Value (Construction Project)  
 Sum ABC (Construction Project)

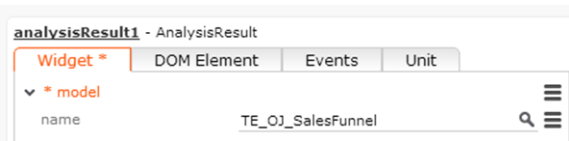
The analysis uses the query above and filters by default by tendering date within the current year. Additional drill-down and filters are provided for the internal reps, the country, the ABC classification and the different dates. The value of the sum of all order values is calculated per status (similar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

### Form: TE\_PropertySalesFunnel

#### Layout of the form:



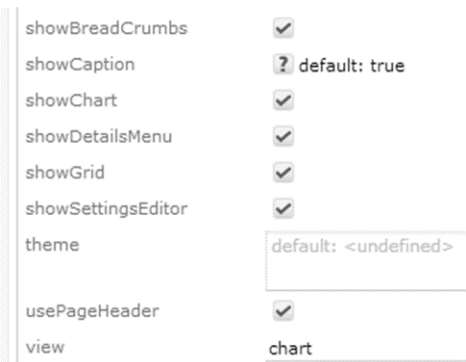
#### analysisResult1 Configuration:



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

|                   |                                                                                                   |  |
|-------------------|---------------------------------------------------------------------------------------------------|--|
| Text              | Property Sales Funnel                                                                             |  |
| Configuration     | TE_ISI                                                                                            |  |
| CRM Processes     | Execute Analysis (50002230)                                                                       |  |
| Info Area         |                                                                                                   |  |
| QuickLink Context |                                                                                                   |  |
| Image             | Analysis                                                                                          |  |
|                   | <input checked="" type="checkbox"/> Visible                                                       |  |
| Action            | ShowForm                                                                                          |  |
| Description       | Application-Menu-Action:<br>TE_ID_NET_PropertySalesFunnel to show the sales funnel for properties |  |

The entry can be called directly from the “ID\_NET\_QUERIES\_AND\_STATISTICS” menu and shows the form that was defined above.

**Action for Menu TE\_ID\_NET\_PropertySalesFunnel**

|                 |                                                      |                        |
|-----------------|------------------------------------------------------|------------------------|
| Action Template | ShowForm                                             |                        |
|                 | Shows a Form                                         |                        |
|                 | <input type="checkbox"/> Pass arguments as an object |                        |
| Input Arguments |                                                      |                        |
|                 | FormName                                             | TE_PropertySalesFunnel |
|                 | New Argumentname                                     |                        |

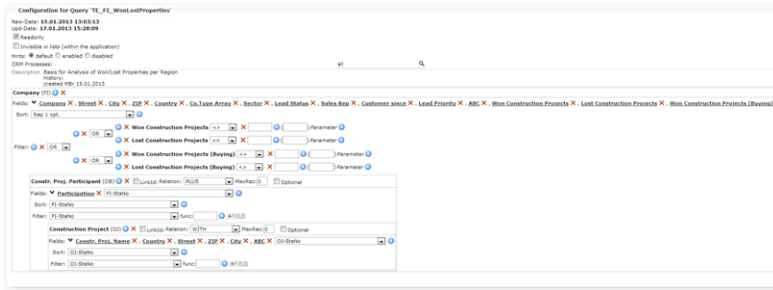
No additional parameters are required.

## 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.

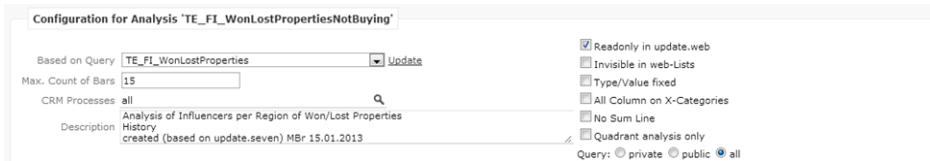
The analysis itself gives a complete overview oo all the participants. From the view the user can directly navigate to the respective company record.

## 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.

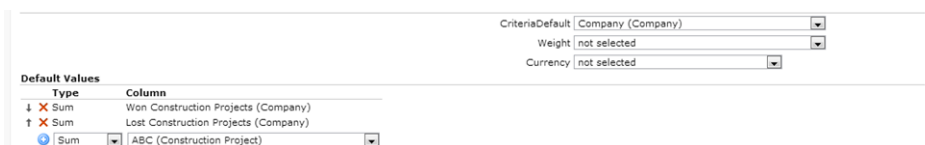
### Analysis: TE\_FI\_WonLostPropertiesNotBuying



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

| Field Name                                 | Defaultvalue             | Default-End              | Slices                   | Category                            | List-Nr. | List-Width |
|--------------------------------------------|--------------------------|--------------------------|--------------------------|-------------------------------------|----------|------------|
| <b>Company (1)</b>                         |                          |                          |                          |                                     |          |            |
| Company (2)                                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                                     | 1        | 5%         |
| Country (5)                                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                                     | 5        | 5%         |
| ZIP (7)                                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                                     | 3        | 5%         |
| City (8)                                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                                     | 4        | 5%         |
| Street (10)                                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                                     | 2        | 5%         |
| Area (23)                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                                     |          | 5%         |
| Co.Type Array (28)                         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                                     |          | 5%         |
| Lead Status (38)                           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                                     | 8        | 5%         |
| Sales Rep (132)                            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                                     | 6        | 5%         |
| Sector (29)                                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                                     | 7        | 5%         |
| Won Construction Projects (5000)           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                                     |          | 5%         |
| Lost Construction Projects (5001)          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                                     |          | 5%         |
| ABC (5002)                                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 9        | 5%         |
| Won Construction Projects (Buying) (5010)  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                                     |          | 5%         |
| Lost Construction Projects (Buying) (5011) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                                     |          | 5%         |
| Customer since (5016)                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                                     |          | 5%         |
| Lead Priority (5026)                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                                     |          | 5%         |
| <b>Constr. Proj. Participant (1)</b>       |                          |                          |                          |                                     |          |            |
| Participation (6)                          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                                     | 10       | 5%         |
| <b>Construction Project (1)</b>            |                          |                          |                          |                                     |          |            |
| Constr. Proj. Name (5)                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                                     | 11       | 5%         |
| Country (6)                                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                                     | 12       | 5%         |
| ZIP (7)                                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                                     |          | 5%         |
| City (8)                                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                                     |          | 5%         |
| Street (10)                                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                                     |          | 5%         |
| ABC (5022)                                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |          | 5%         |

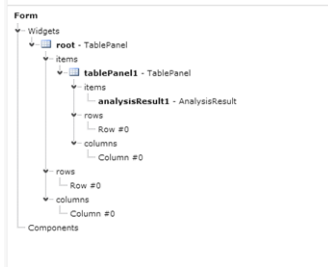
The sorting by ABC is disabled by default, information from FI, OB and OJ act as filter and drill-down possibilities. Information from FI, OB and OJ is used for the list view.



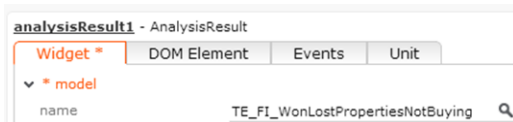
A sum of all won and lost projects per company is provided. The sum is precalculated via a background workflow.

## 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

|                   |                                                                                    |                                                                                                                                                                     |
|-------------------|------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Text              | Won/Lost Properties of Not Buying Compan...                                        |                                                                                    |
| Configuration     | TE_ISI                                                                             |                                                                                                                                                                     |
| CRM Processes     | Execute Analysis (50002230)                                                        |   |
| Info Area         |                                                                                    |                                                                                                                                                                     |
| QuickLink Context |                                                                                    |                                                                                                                                                                     |
| Image             |   |                                                                                    |
|                   | Analysis                                                                           |                                                                                                                                                                     |
|                   | <input checked="" type="checkbox"/> Visible                                        |                                                                                                                                                                     |
| Action            | ShowForm                                                                           |   |
| Description       | Application-Menu-Action:<br>TE_ID_NET_WonLostPropertiesNotBuying<br>shows the Form |                                                                                    |

The entry is directly integrated into the “ID\_NET\_QUERIES\_AND\_STATISTICS” application menu and calls the form without any additional parameters:

### Action for Menu TE\_ID\_NET\_WonLostPropertiesNotBuying

|                 |                                                                                                                                          |                                                                                                                                                                                                        |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Action Template | ShowForm                                                                                                                                 |                                                                                                                      |
|                 | Shows a Form                                                                                                                             |                                                                                                                                                                                                        |
|                 | <input type="checkbox"/> Pass arguments as an object  |                                                                                                                                                                                                        |
| Input Arguments |                                                       |                                                                                                                                                                                                        |
|                 | ! FormName                                                                                                                               | TE_WonLostPropertiesNotBuying   |

## Property Portfolio

Learn how to configure property portfolio.

### 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**

---

**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: Qualitative Questions/Answers :**



### 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?**

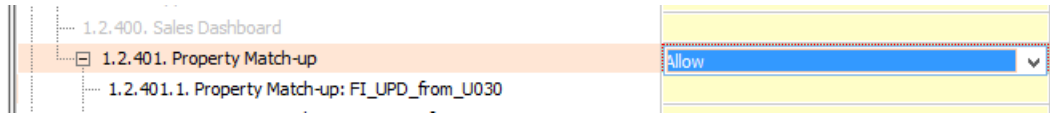
- Yes
- Partially
- No
- No response

**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 (pos 27, 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 (pos 48, 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 Condition | 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 Condition | 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 Condition | New | Upd | Delete | Old Condition | 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:

- Property Match-up
  - Imported Properties Data
  - Imported Participants Data
  - Imported Participation Data

- Core CRM Processes
  - Service (1.1.)
  - Sales (1.2.)
  - Marketing (1.3.)
  - CRM Base (1.4.)
  - Administration (1.5.)
    - System Configuration (1.5.1.)
    - Maintenance (1.5.2.)
    - System Interfaces (1.5.3.)
    - Connectors (1.5.4.)
    - Revision (1.5.5.)
    - Info Area Rights (50020000)
    - Admin Application Menu (1.5.400\_AdminApplicationMenu (UI))
    - Product (70000190)

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:



**Property Match-up** Search

---

**Property Match-up - Match-up and merge of properties and participants**

Import - Properties must be checked << < 1 - 15 of 15+ > >> Take over Property  
X Reject Property

| Prope...      | Country | Posta... | City       | Street         | Creat...   | Source | Status |
|---------------|---------|----------|------------|----------------|------------|--------|--------|
| "Peter un...  | Germany | 84028    | Landshut   |                | 18.12.2013 | IBau   |        |
| "St. Anton... | Germany | 91301    | Forchheim  | Klosterstr...  | 18.12.2013 | IBau   |        |
| "St. Anton... | Germany | 91301    | Forchheim  | Klosterstr...  | 18.12.2013 | IBau   |        |
| Neubau 3...   | Germany | 40764    | Langenfeld | Nelly-Sac...   | 18.12.2013 | IBau   |        |
| Neubau ei...  | Germany | 84028    | Landshut   |                | 18.12.2013 | IBau   |        |
| Neubau ei...  |         | 60437    | Frankfurt  |                | 18.12.2013 | IBau   |        |
| Neubau ei...  | Germany | 93047    | Regensburg | steht noch...  | 18.12.2013 | IBau   |        |
| Neubau ei...  |         | 91052    | Erlangen   | Elisabeths...  | 18.12.2013 | IBau   |        |
| Neubau ei...  |         | 44651    | Herne      | Eickeler S...  | 18.12.2013 | IBau   |        |
| Neubau ei...  |         | 87700    | Memmingen  | Freudenth...   | 18.12.2013 | IBau   |        |
| Neubau ei...  |         | 13158    | Berlin     | Mittelstraß... | 18.12.2013 | IBau   |        |
| Neubau ei...  |         | 12459    | Berlin     | Treskowstr...  | 18.12.2013 | IBau   |        |
| Neubau ei...  | Germany | 85049    | Ingolstadt | Albertus-...   | 18.12.2013 | IBau   |        |
| Neubau ei...  |         | 13437    | Berlin     | Techowpr...    | 18.12.2013 | IBau   |        |
| Neubau ei...  | Germany | 33602    | Bielefeld  | Walther-R...   | 18.12.2013 | IBau   |        |

<< < 1 - 15 of 15+ > >>

**Participants of selected property**

| Comp...      | Partic...     | Country | Postal... | City    | Street        | Creat...   | Source |
|--------------|---------------|---------|-----------|---------|---------------|------------|--------|
| Bayerisch... | Tenderee      | Germany | 81669     | München | Franziskan... | 18.12.2013 | IBau   |
| Bayerisch... | Project Ma... | Germany | 81669     | München | Franziskan... | 18.12.2013 | IBau   |

**Overview of new properties after take over in database**

| Property                | Status        | Con...   | Sub... | Cou...  | Post... | City      | Or... |
|-------------------------|---------------|----------|--------|---------|---------|-----------|-------|
| Neubau 35 Reihen...     | Allocated ... | Planning |        | Germany | 40789   | Monheim   |       |
| "The Fizz" - Erricht... | Allocated ... | Planning |        | Germany | 60326   | Frankfurt |       |
| "Musikerhaus" - N...    | Allocated ... | Planning |        | Germany | 20457   | Hamburg   |       |
| "Villa Schott" - Sa...  | To Allocate   | Planning |        | Germany | 63303   | Dreieich  |       |
| "IQ Nordostbahnh...     | Allocated ... | Planning |        | Germany | 90491   | Nürnberg  |       |
| "Revaler Spitze" - ...  | Allocated ... | Planning |        | Germany | 10245   | Berlin    |       |
| "Saloe" - Neubau ...    | To Allocate   | Planning |        | Germany | 63071   | Offenb... |       |

**Participants of selected property**

| Participation    | Company                  | City      | Person | Participation G... |
|------------------|--------------------------|-----------|--------|--------------------|
| Builder          | International Campus ... | Munch...  |        | Non-buying Company |
| Product Engineer | Magnus Kaminiarz & C...  | Frankf... |        | Non-buying Company |

**Not yet transferred participants of selected property** Take over Participants

| Participation              | Company       |
|----------------------------|---------------|
| Responsible Administration | Neuer Bauherr |

Please note that the right part of the form consists of the imported records. If a user should not be able to open these records 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    | 0 |
| Neubau eines Menfamille... | 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

#### Participants of selected property

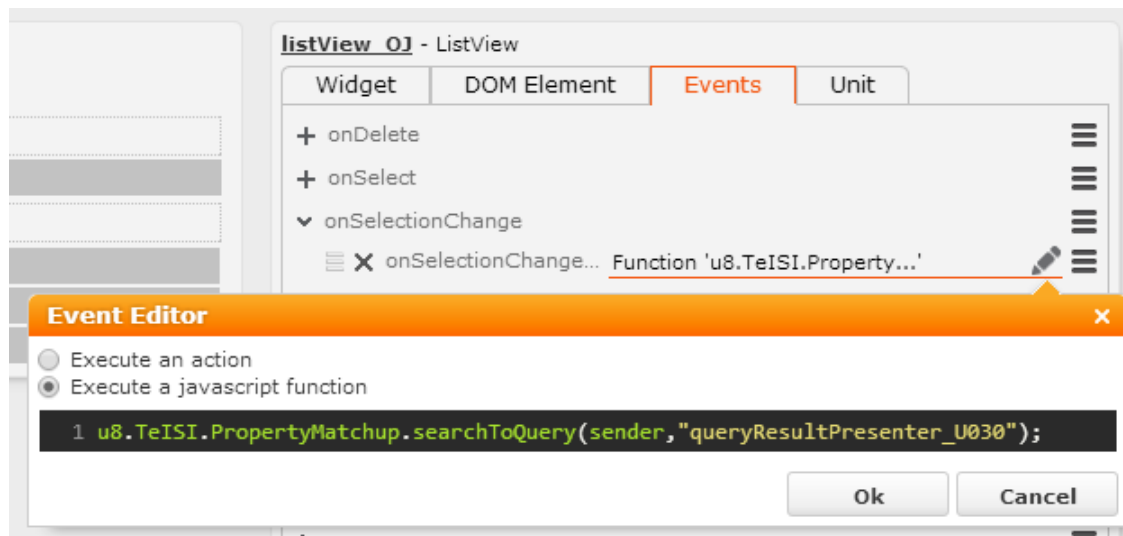
| Participation    | Company                                       | City      | Person | Participation Group |
|------------------|-----------------------------------------------|-----------|--------|---------------------|
| Builder          | <a href="#">International Campus AG</a>       | München   |        | Non-buying Company  |
| Product Engineer | <a href="#">Magnus Kaminiarz &amp; Cie...</a> | Frankfurt |        | Non-buying Company  |

#### Not yet transferred participants of selected property

take over Participants

| Participation              | Company       |
|----------------------------|---------------|
| Responsible Administration | Neuer Bauherr |

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

### Property Match-up

#### Property Match-up - Match-up and merge of properties and participants

Import - Properties must be checked << < 1 - 15 of 15+ > >>

 Take over Property  Reject Property

|    | Property          | Country | Postal Code | City         | Street            | Created on | Source          | Status |
|-------------------------------------------------------------------------------------|-------------------|---------|-------------|--------------|-------------------|------------|-----------------|--------|
|                                                                                     | "An der Reiten... |         | 93444       | Bad Kötzting | Reitensteiner ... | 13.11.2013 |                 |        |
|  | "anders Wohn...   |         | 50859       | Köln         | Auf der Aspel     | 13.11.2013 | marketing.ma... |        |
|                                                                                     | "Logen Gärten...  |         | 90763       | Fürth        | Dambacher St...   | 13.11.2013 |                 |        |
|                                                                                     | "Musikerhaus" ... |         | 20457       | Hamburg      | Shanghaiallee     | 13.11.2013 |                 |        |

### 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 change the 'TE\_A\_U029\_reject' action to javascript and 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

### Participants of selected property

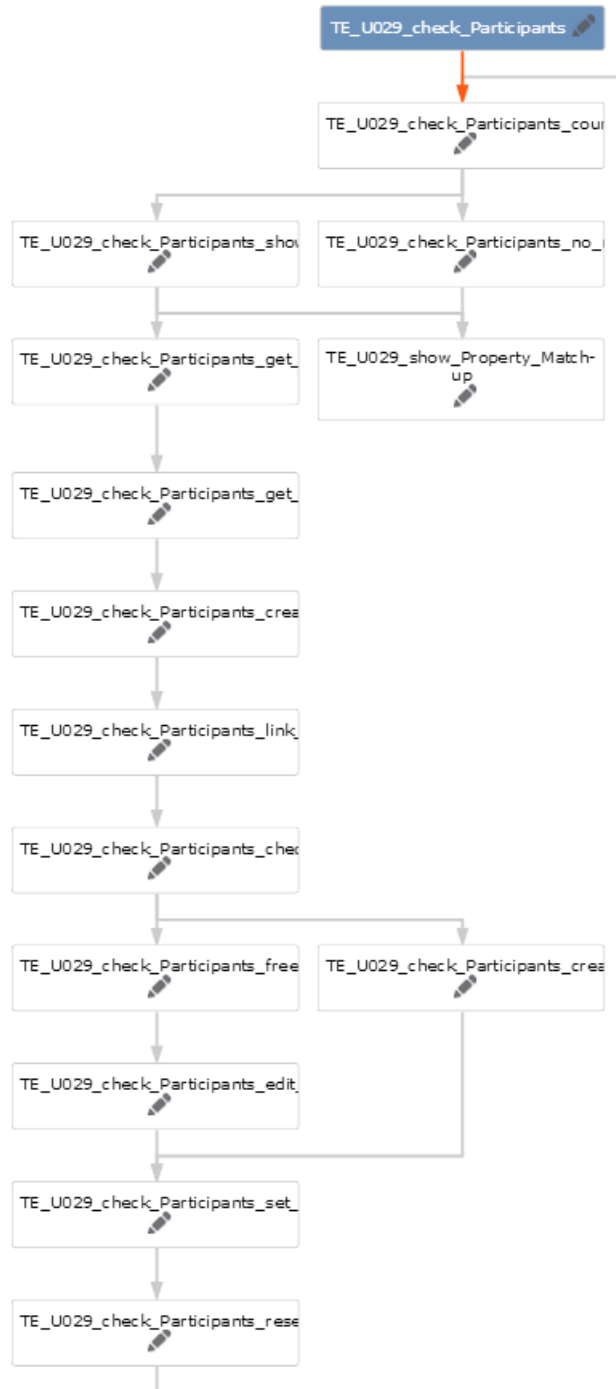
The query returned no results.

### Not yet transferred participants of selected property

take over Participants

| Pa... | Company                                      |
|-------|----------------------------------------------|
|       | Heidt Bau GmbH                               |
|       | Architekturbüro Dipl.-Ing. Hans-Jürgen Finke |

Note that this process can only be called from the check\_U030\_process jsript 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.

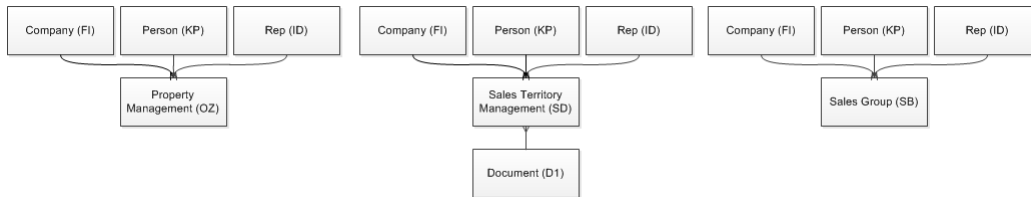
Once an imported participant is selected the process gets all necessary details which are linked to the imported participant.

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

|                                        |                                |                |     |     |
|----------------------------------------|--------------------------------|----------------|-----|-----|
| <b>ID_NET_TERRITORY_MGMT</b>           | Sales Territory Management     | UPDATE_DEFAULT | all | 🔍 X |
| <b>ID_NET_CALC_TERRITORYALLOCATION</b> | Calculate territory allocation | UPDATE_DEFAULT | all | 🔍 X |
| <b>ID_NET_UNALLOC_COMPANIES</b>        | Companies without Allocation   | UPDATE_DEFAULT | all | 🔍 X |
| <b>ID_NET_UNALLOC_PROPERTIES</b>       | Properties without Allocation  | UPDATE_DEFAULT | all | 🔍 X |

**Menu ID\_NET\_TERRITORY\_MGMT**

[Copy to this configuration](#) [Extend](#)

Description

Text Sales Territory Management

Configuration **UPDATE\_DEFAULT**

CRM Processes Sales Territory Management (2440000) 🔍

Info Area

QuickLink Context

Image <No Image>

Visible

Action SearchAndList 🔍

### SB – Company tree view

Info Area: **Sales Group (SB)** 🔽  Readonly

show all

LinkID:

Parent: **0: Company (FI)** 🔽

CRM Processes: all 🔍

Filter:

Relation Name:

Table Caption: SB

InfoArea-Label-Text:

Record Count: 10

Sorting:

Company related

Expand

Expand records

Show count

Check children

Hide groupnode

Hide records

No records

Disable tweaks

**Record Node**

Menu: no Menu 🔽

Expand Configuration: SB

Custom Control:

Generic Form:

**InfoArea Node**

Menu: no Menu 🔽

Search&List Configuration: SB

Custom Control:

Generic Form:

### OZ – Constr. Project tree view

0 Construction Project (O3)

Info Area: **Property Management (OZ)** 🔽  Readonly

show all

LinkID:

Parent: **0: Construction Project (O3)** 🔽

CRM Processes: all 🔍

Filter:

Relation Name:

Table Caption: OZ

InfoArea-Label-Text:

Record Count: 15

Sorting:

Company related

Expand

Expand records

Show count

Check children

Hide groupnode

Hide records

No records

Disable tweaks

**Record Node**

Menu: no Menu 🔽

Expand Configuration: OZ

Custom Control:

Generic Form:

**InfoArea Node**

Menu: no Menu 🔽

Search&List Configuration: OZ

Custom Control:

Generic Form:



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:

```
1 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”)

|                                        |                                |                |     |     |
|----------------------------------------|--------------------------------|----------------|-----|-----|
| <u>ID_NET_TERRITORY_MGMT</u>           | Sales Territory Management     | UPDATE_DEFAULT | all | 🔍 ✕ |
| <u>ID_NET_CALC_TERRITORYALLOCATION</u> | Calculate territory allocation | UPDATE_DEFAULT | all | 🔍 ✕ |
| <u>ID_NET_UNALLOC_COMPANIES</u>        | Companies without Allocation   | UPDATE_DEFAULT | all | 🔍 ✕ |
| <u>ID_NET_UNALLOC_PROPERTIES</u>       | 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

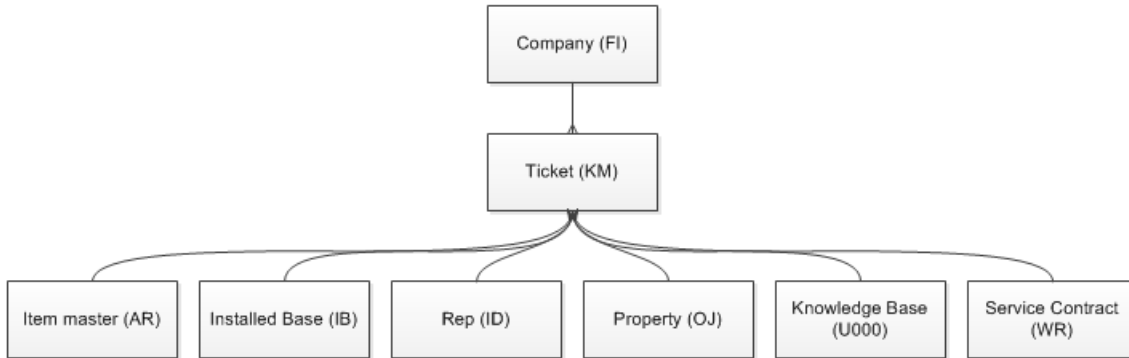
Menu actions which are used to show companies and properties without allocation (actions from “update\_default”)

|                                        |                                |                |     |     |
|----------------------------------------|--------------------------------|----------------|-----|-----|
| <u>ID_NET_TERRITORY_MGMT</u>           | Sales Territory Management     | UPDATE_DEFAULT | all | 🔍 ✕ |
| <u>ID_NET_CALC_TERRITORYALLOCATION</u> | Calculate territory allocation | UPDATE_DEFAULT | all | 🔍 ✕ |
| <u>ID_NET_UNALLOC_COMPANIES</u>        | Companies without Allocation   | UPDATE_DEFAULT | all | 🔍 ✕ |
| <u>ID_NET_UNALLOC_PROPERTIES</u>       | Properties without Allocation  | UPDATE_DEFAULT | all | 🔍 ✕ |

# Service

Learn about the customer service process in business solution template.

## Complaint Management and Tickets(CRM 70000500)



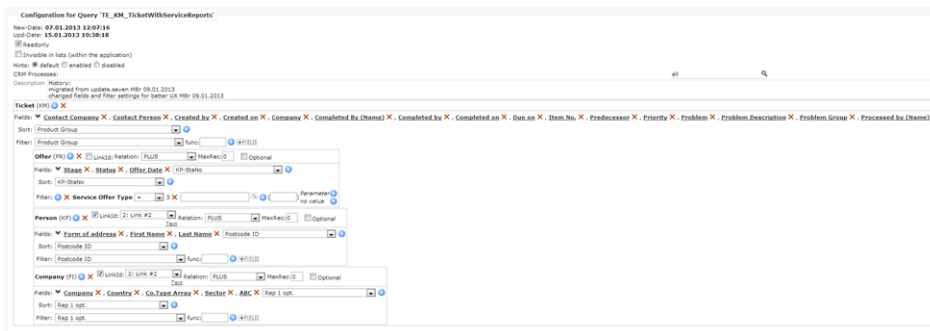
## Service Tickets

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

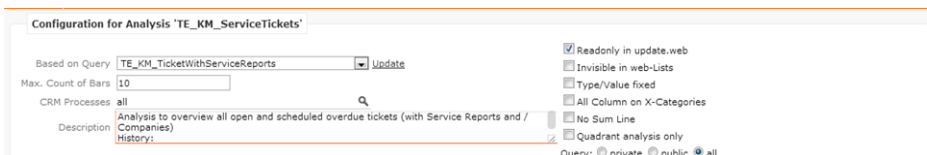
The number of tickets, service reports and companies is therefore counted.

### 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



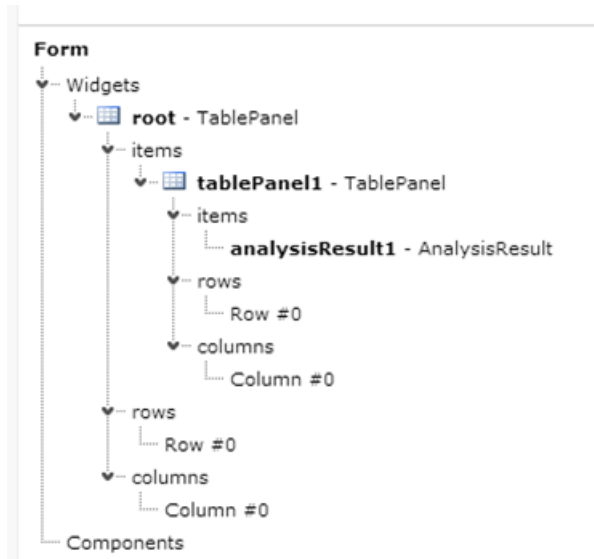
The above defined query is the basis for the analysis.

| Field Name                                        | Filter                              | Drill-Down               | Count    | % |
|---------------------------------------------------|-------------------------------------|--------------------------|----------|---|
| ▲ Ticket (1)                                      |                                     |                          |          |   |
| ✖ Product Group (29)                              | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 8        | % |
| ✖ Product (30)                                    | <input type="checkbox"/>            | <input type="checkbox"/> |          |   |
| ✖ Problem Group (4)                               | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 7        | % |
| ✖ Problem (5)                                     | <input type="checkbox"/>            | <input type="checkbox"/> |          |   |
| ✖ Ticket No. (7)                                  | <input type="checkbox"/>            | <input type="checkbox"/> | 1        | % |
| ✖ Processed by (10)                               | <input checked="" type="checkbox"/> | <input type="checkbox"/> |          |   |
| ✖ Completed by (11)                               | <input checked="" type="checkbox"/> | <input type="checkbox"/> |          |   |
| ✖ Status (35)                                     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |          |   |
| ✖ Created by (49)                                 | <input type="checkbox"/>            | <input type="checkbox"/> |          |   |
| ✖ Processed by (Name) (50)                        | <input type="checkbox"/>            | <input type="checkbox"/> | 4        | % |
| ✖ Completed By (Name) (51)                        | <input type="checkbox"/>            | <input type="checkbox"/> |          |   |
| ✖ Created on (55)                                 | <input type="checkbox"/>            | <input type="checkbox"/> |          |   |
| ✖ Due on (57)                                     | <input checked="" type="checkbox"/> | <input type="checkbox"/> | \$curDay | 3 |
| ✖ Completed on (59)                               | <input type="checkbox"/>            | <input type="checkbox"/> |          |   |
| ✖ Priority (61)                                   | <input checked="" type="checkbox"/> | <input type="checkbox"/> |          |   |
| ✖ Problem Description (62)                        | <input type="checkbox"/>            | <input type="checkbox"/> |          |   |
| ✖ Solution (64)                                   | <input type="checkbox"/>            | <input type="checkbox"/> |          |   |
| ✖ Maintenance Contract (65)                       | <input type="checkbox"/>            | <input type="checkbox"/> |          |   |
| ✖ Predecessor (73)                                | <input type="checkbox"/>            | <input type="checkbox"/> |          |   |
| ✖ Subject (90)                                    | <input type="checkbox"/>            | <input type="checkbox"/> | 2        | % |
| ✖ Company (91)                                    | <input type="checkbox"/>            | <input type="checkbox"/> |          |   |
| ✖ Contact Company (97)                            | <input type="checkbox"/>            | <input type="checkbox"/> | 6        | % |
| ✖ Contact Person (96)                             | <input type="checkbox"/>            | <input type="checkbox"/> | 5        | % |
| ✖ Reaction Time/SLA (109)                         | <input type="checkbox"/>            | <input type="checkbox"/> |          |   |
| ✖ Reaction Time Units/SLA (110)                   | <input type="checkbox"/>            | <input type="checkbox"/> |          |   |
| ✖ Item No. (26)                                   | <input type="checkbox"/>            | <input type="checkbox"/> |          |   |
| ✖ Service Level (5019)                            | <input type="checkbox"/>            | <input type="checkbox"/> |          |   |
| ✖ Type (5023)                                     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |          |   |
| ✖ Installed Base with Warranty (5027)             | <input checked="" type="checkbox"/> | <input type="checkbox"/> |          |   |
| ✖ Warranty to (5028)                              | <input type="checkbox"/>            | <input type="checkbox"/> |          |   |
| ✖ The company has a valid service contract (5029) | <input type="checkbox"/>            | <input type="checkbox"/> |          |   |
| ✖ Active (5032)                                   | <input checked="" type="checkbox"/> | <input type="checkbox"/> | true     |   |
| ▲ Offer (1)                                       |                                     |                          |          |   |
| ✖ Status (8)                                      | <input checked="" type="checkbox"/> | <input type="checkbox"/> |          |   |
| ✖ Stage (9)                                       | <input type="checkbox"/>            | <input type="checkbox"/> |          |   |
| ✖ Offer Date (10)                                 | <input type="checkbox"/>            | <input type="checkbox"/> |          |   |
| ▲ Person (1)                                      |                                     |                          |          |   |
| ✖ Form of address (0)                             | <input type="checkbox"/>            | <input type="checkbox"/> |          |   |
| ✖ Last Name (2)                                   | <input type="checkbox"/>            | <input type="checkbox"/> |          |   |
| ✖ First Name (3)                                  | <input type="checkbox"/>            | <input type="checkbox"/> |          |   |
| ▲ Company (1)                                     |                                     |                          |          |   |
| ✖ Company (2)                                     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |          |   |
| ✖ Country (5)                                     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |          |   |
| ✖ Co.Type Array (28)                              | <input checked="" type="checkbox"/> | <input type="checkbox"/> |          |   |

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:

| analysisResult1 - AnalysisResult |                      |        |      |
|----------------------------------|----------------------|--------|------|
| Widget *                         | DOM Element          | Events | Unit |
| ▼ * model                        |                      |        |      |
| name                             | TE_KM_ServiceTickets |        |      |

The above defined analysis is called

|                |                                     |  |  |
|----------------|-------------------------------------|--|--|
| ▼ chart        |                                     |  |  |
| chartType      | Bar3D                               |  |  |
| disabled       | ? default: false                    |  |  |
| fixedChartType |                                     |  |  |
| flavors        | default: <undefined>                |  |  |
| hideSelector   | <input checked="" type="checkbox"/> |  |  |
| showLegend     | <input checked="" type="checkbox"/> |  |  |
| showValues     | <input checked="" type="checkbox"/> |  |  |

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.

|                    |                                     |  |  |
|--------------------|-------------------------------------|--|--|
| showBreadCrumbs    | <input checked="" type="checkbox"/> |  |  |
| showCaption        | ? default: false                    |  |  |
| showChart          | <input checked="" type="checkbox"/> |  |  |
| showDetailsMenu    | <input checked="" type="checkbox"/> |  |  |
| showGrid           | <input checked="" type="checkbox"/> |  |  |
| showSettingsEditor | <input checked="" type="checkbox"/> |  |  |
| theme              | default: <undefined>                |  |  |
| usePageHeader      | <input checked="" type="checkbox"/> |  |  |
| view               | grid                                |  |  |

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

|                   |                                                                  |  |
|-------------------|------------------------------------------------------------------|--|
| Text              | Service Tickets                                                  |  |
| Configuration     | TE_ISI                                                           |  |
| CRM Processes     | Execute Analysis (50002230)                                      |  |
| Info Area         |                                                                  |  |
| QuickLink Context |                                                                  |  |
| Image             | Analysis                                                         |  |
|                   | <input checked="" type="checkbox"/> Visible                      |  |
| Action            | ShowForm                                                         |  |
| Description       | Application-Menu-Action:<br>TE_ID_NET_ServiceTickets<br>History: |  |

The entry is directly called from the “ID\_NET\_QUERIES\_AND\_STATISTICS” application menu and calls the above defined form without any special parameters:

**Action for Menu TE\_ID\_NET\_ServiceTickets**

|                 |                                                      |  |
|-----------------|------------------------------------------------------|--|
| Action Template | ShowForm                                             |  |
|                 | Shows a Form                                         |  |
|                 | <input type="checkbox"/> Pass arguments as an object |  |
| Input Arguments |                                                      |  |
| ! FormName      | TE_ServiceTickets                                    |  |

## 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)

|                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                |                        |                |                |        |               |                           |                |             |  |  |       |          |  |                   |                       |                     |  |                                |                   |                     |  |              |  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|------------------------|----------------|----------------|--------|---------------|---------------------------|----------------|-------------|--|--|-------|----------|--|-------------------|-----------------------|---------------------|--|--------------------------------|-------------------|---------------------|--|--------------|--|
| <ul style="list-style-type: none"> <li>A non existing company</li> <li>Persons</li> <li>Activities</li> <li>Opportunities</li> <li>Offers</li> <li>Orders</li> <li>Installed Bases</li> <li>Service Contracts</li> <li>Tickets</li> <li>Complaint 10001-6081 44...</li> </ul> | <p><b>Complaint 10001-6081 444444</b></p> <p>Menu    </p> <table border="0"> <tr> <td>Contact Company</td> <td>A non existing company</td> <td>Contact Person</td> <td>Subject 444444</td> </tr> <tr> <td>Status</td> <td>2 - Allocated</td> <td>Type (Service Management)</td> <td>No. 10001-6081</td> </tr> <tr> <td>Predecessor</td> <td></td> <td></td> <td>Cause</td> </tr> <tr> <td>Solution</td> <td></td> <td>Created by TE_ISI</td> <td>Created on 09.05.2012</td> </tr> <tr> <td>Rep (Access denied)</td> <td></td> <td>Processed by Beatrice BaseTest</td> <td>Due on 16.05.2012</td> </tr> <tr> <td>Completed By (Name)</td> <td></td> <td>Completed on</td> <td></td> </tr> </table> | Contact Company                | A non existing company | Contact Person | Subject 444444 | Status | 2 - Allocated | Type (Service Management) | No. 10001-6081 | Predecessor |  |  | Cause | Solution |  | Created by TE_ISI | Created on 09.05.2012 | Rep (Access denied) |  | Processed by Beatrice BaseTest | Due on 16.05.2012 | Completed By (Name) |  | Completed on |  |
| Contact Company                                                                                                                                                                                                                                                               | A non existing company                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Contact Person                 | Subject 444444         |                |                |        |               |                           |                |             |  |  |       |          |  |                   |                       |                     |  |                                |                   |                     |  |              |  |
| Status                                                                                                                                                                                                                                                                        | 2 - Allocated                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Type (Service Management)      | No. 10001-6081         |                |                |        |               |                           |                |             |  |  |       |          |  |                   |                       |                     |  |                                |                   |                     |  |              |  |
| Predecessor                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                | Cause                  |                |                |        |               |                           |                |             |  |  |       |          |  |                   |                       |                     |  |                                |                   |                     |  |              |  |
| Solution                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Created by TE_ISI              | Created on 09.05.2012  |                |                |        |               |                           |                |             |  |  |       |          |  |                   |                       |                     |  |                                |                   |                     |  |              |  |
| Rep (Access denied)                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Processed by Beatrice BaseTest | Due on 16.05.2012      |                |                |        |               |                           |                |             |  |  |       |          |  |                   |                       |                     |  |                                |                   |                     |  |              |  |
| Completed By (Name)                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Completed on                   |                        |                |                |        |               |                           |                |             |  |  |       |          |  |                   |                       |                     |  |                                |                   |                     |  |              |  |

## Ticket Management

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

| 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

Name: OJ\_UPD\_ActiveTickets

Info Area: Construction Project  
 Action: Edit/update  
 Search Index:   
 Mask:   
 Format Name:   
 Accomp. Text: Counts the number of open tickets

Search Condition  
 Plausibility check  
 Prior to saving  
 Interactive  
 Abort  
 Suppress subsequent triggers  
 Record prior to change

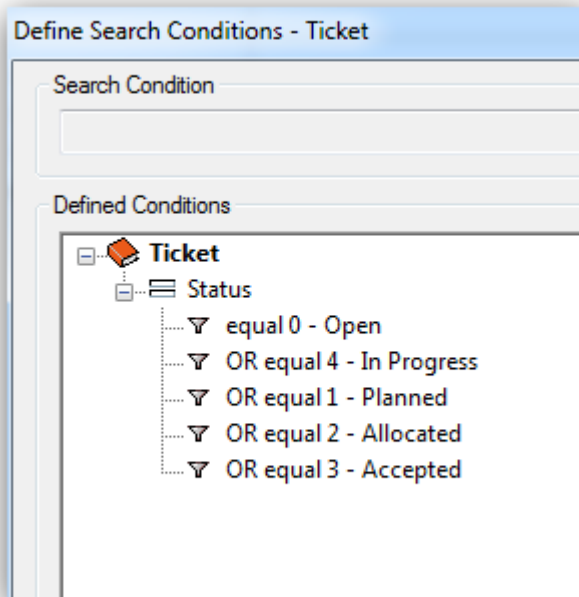
Single/serial letter WEB Level E-mail

| Field            | Function | Field Contents | Reference Fu | Variable | Direct Reference | Reference | With Conc | Message |
|------------------|----------|----------------|--------------|----------|------------------|-----------|-----------|---------|
| 0 Active tickets |          |                |              |          |                  | ✓         |           |         |
| New Line         |          |                |              |          |                  |           |           |         |

**Field Reference:Active tickets**

| Root info area         | = Trigger Info Area | Index Relationship                              | Info Area | With Conditions |
|------------------------|---------------------|-------------------------------------------------|-----------|-----------------|
| 0 Construction Project | ✓                   | 276. OJ-StaNo,Constr. Project No. -> OJ-StaNo,C | Ticket    | ✓               |





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:

| Workflow | Name                                           | Index Relationship | With Conditions | New | Upd | Delete | Old Condition |
|----------|------------------------------------------------|--------------------|-----------------|-----|-----|--------|---------------|
| 0        | KM_Div_Default Values                          |                    |                 | ✓   |     |        |               |
| 1        | KM_LFD_Update TicketInfo                       |                    |                 | ✓   |     |        |               |
| 2        | KM_LFD_Update Ticket from Service Contract     |                    |                 |     | ✓   |        |               |
| 3        | KM_LFD_Set Ticket Due Date and Time            |                    | ✓               | ✓   |     |        |               |
| 4        | KM_LFD_Copy_Fields_from_WIP                    |                    | ✓               | ✓   |     |        |               |
| 5        | WP_LFD_OnTicketCompleted_SetLastService        |                    | ✓               |     | ✓   |        |               |
| 6        | UX00_NEW_Create New Knowledgebase Entry from T |                    | ✓               |     | ✓   |        |               |
| 7        | KM_LFD_SetEndCustomerLinkIfEmpty               |                    | ✓               | ✓   |     |        |               |
| 8        | KM_LFD_SetFXFromEndCustomer                    |                    | ✓               | ✓   |     |        |               |
| 9        | AF_NEW_CheckList                               |                    |                 | ✓   |     |        |               |
| 10       | KM_LFD_SetActiveStatusCheck                    |                    |                 | ✓   |     |        |               |
| 11       | A1_NEW_FromTicket                              |                    | ✓               |     |     |        |               |
| 12       | FL_LFD_ActiveTickets                           |                    |                 | ✓   | ✓   | ✓      |               |
| 13       | OJ_LFD_ActiveTickets                           |                    |                 | ✓   | ✓   | ✓      |               |
| 14       | IB_LFD_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.

Name: TD\_NEW\_ToDo\_For\_MMServer\_WF\_TE\_WP\_Create Tickets

Info Area: **To-Do**

Action: Add new

Search Index: [ ]

Mask: [ ]

Format Name: [ ]

Accomp. Text: [ ]

Search Condition:

- Plausibility check
- Prior to saving
- Interactive
- Abort
- Suppress subsequent triggers
- Record prior to change

Single/serial letter WEB Level E-mail

|   | Field            | Function | Field Contents                   | Reference Fu | Variable     | Direct Reference | Reference | With Conc | 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.TeISt.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:

|                        |                                                     |               |         |
|------------------------|-----------------------------------------------------|---------------|---------|
| Configuration Category | Ticket                                              | Country       | Austria |
| Configuration Option   | Duration in days before the ticket should be ticket | Business Area |         |

### Spare Parts – Serial Entry

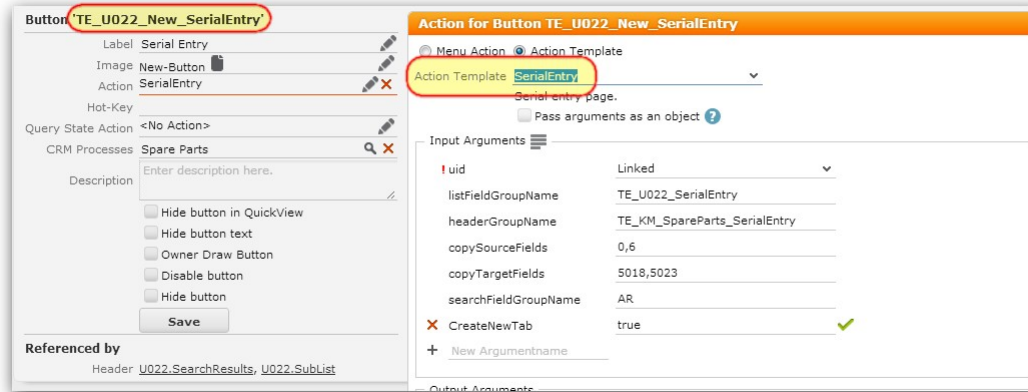
The “U022” Spare Parts info area has been customized and is available as a sub-list of the Ticket (KM). Serial Entry modifications:

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

| STANDARD HEADERS    |               |                    | SPECIAL HEADERS  |               |                                            |
|---------------------|---------------|--------------------|------------------|---------------|--------------------------------------------|
| Header Type         | Configuration | Description        | Name             | Configuration | Description                                |
| Search              | Q +           | from default group | SerialEntry      | TE_IS1        | used for Spare Parts ("U022") Serial Entry |
| SearchResults       | Q +           | from default group | SerialEntry.List | TE_IS1        | used for Spare Parts ("U022") Serial Entry |
| SearchLinked        | Q +           | from default group |                  |               |                                            |
| SearchResultsLinked |               |                    |                  |               |                                            |
| SearchResultsSelect | Q +           | from default group |                  |               |                                            |

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.

**Ticket 10001-6143 - Review**

☰ | ✎ | ✓ | ⓧ | ✉ Create E-mail

**Overview**

End Customer Company [<vx<vx<vx<vx<vx<](#)  
 End Customer Person  
 Contact Company [\\_Bileck Sekt AG](#)  
 Contact Person

Type Ticket  
 Status 6 - Closed  
 Priority ★ ★ ★  
 Due 12.12.2012 - 13:13

Create Task for due date

**Problem**

Installed Base [10001-1233 - 001 Service Report](#)  
 Item No. A001  
 Item Description [edwedwed](#)  
 Subject [Review](#)  
 Problem Description  
 Internal Problem Descripti...  
 Cause  
 Solution

Product Group [Product Group 1](#)  
 Product [Product 1](#)  
 Knowledge Base [Review](#)

**Timing**

Created 05.12.2012 by Sandra ServiceTest  
 Completed 30.01.2013 - 10:45 by [TE ISI](#)

Reaction Time/SLA 1 - Day  
 Warranty to

**Linked Elements**

|                 |                       |
|-----------------|-----------------------|
| Predecessor     | Service Contract      |
| Constr. Project | Service Contract Item |

## Administration of Ticket Mails

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

**Search Template Configuration Table**

|                                                           |                                   |
|-----------------------------------------------------------|-----------------------------------|
| Configuration Category <a href="#">Ticket (E-mails)</a> ▼ | Country <a href="#">_____</a> ▼   |
| Configuration Option <a href="#">_____</a> ▼              | Description <a href="#">_____</a> |
| Active <a href="#">?</a>                                  | With me <input type="checkbox"/>  |
| <a href="#">+ Add more ...</a> ▼                          |                                   |

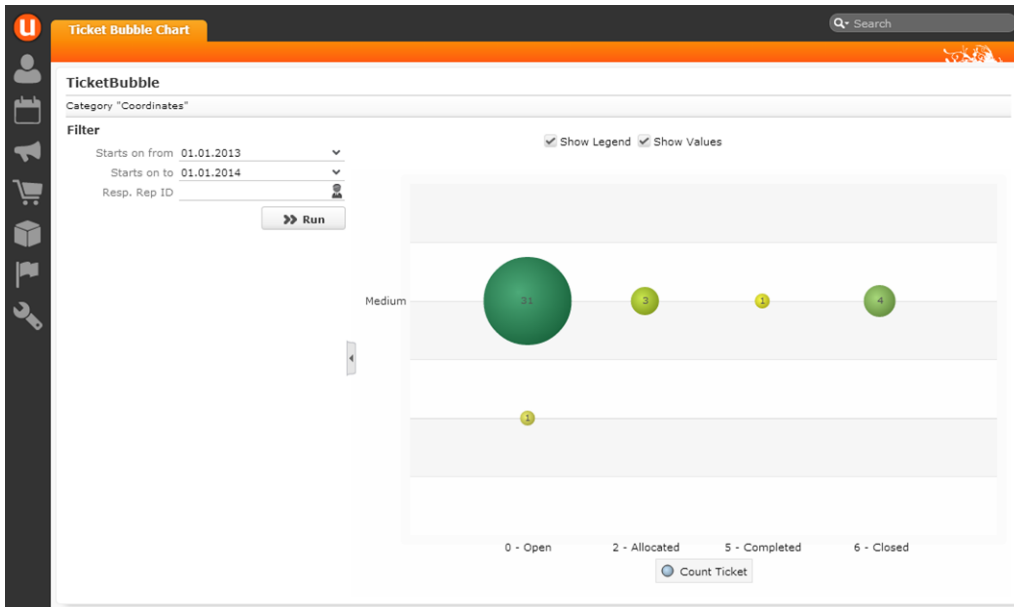
max. 15 ▼ Records / Page Reset Start Search

**Search Results** << 1 - 3 of 3 >>

| Configuration Category | Configuration Option | Descrip |
|------------------------|----------------------|---------|
| Ticket (E-mails)       | Confirmation e-mail  |         |
| Ticket (E-mails)       | Status e-mail        |         |
| Ticket (E-mails)       | Solution e-mail      |         |

## Analysis: Ticket Bubble Chart

An “Administration of Ticket Mails” analysis has been added to the “Queries & Analyses” application menu. No further 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.

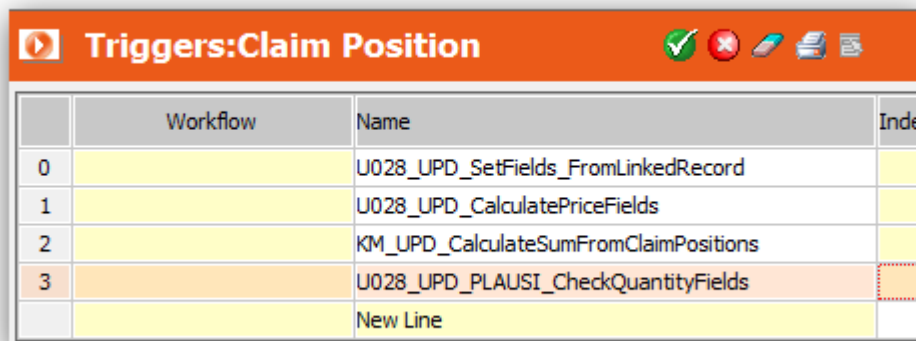
| ID | Name                   | Type                | Reference | Catalog       | DB Column   | Time st | Length |
|----|------------------------|---------------------|-----------|---------------|-------------|---------|--------|
| 0  | 4001 U028-StaNo        | sno(2Byte)          |           |     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

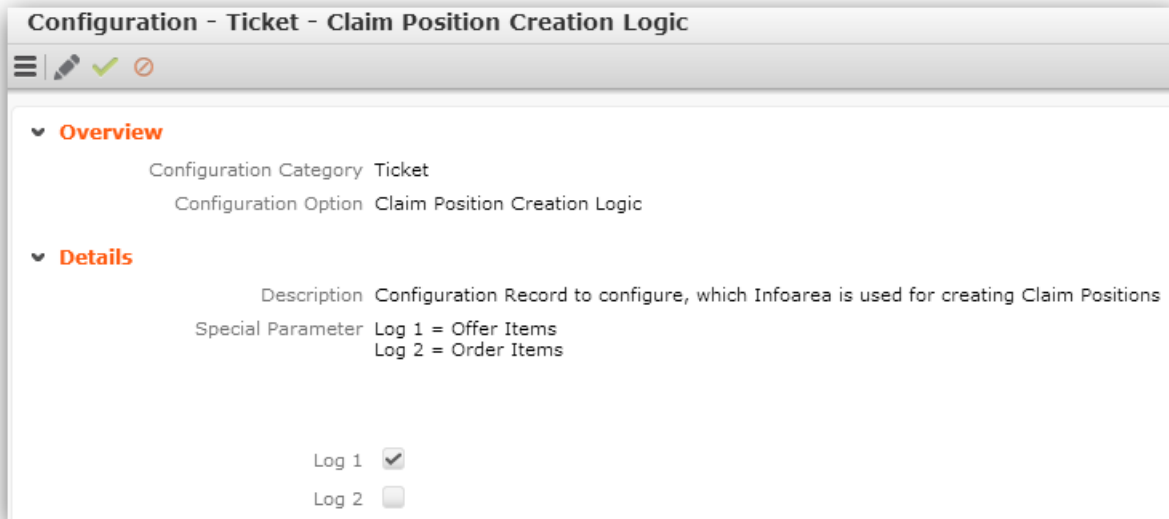
The following elements are used to create records, calculate prices and check the data quality:

| 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                      |

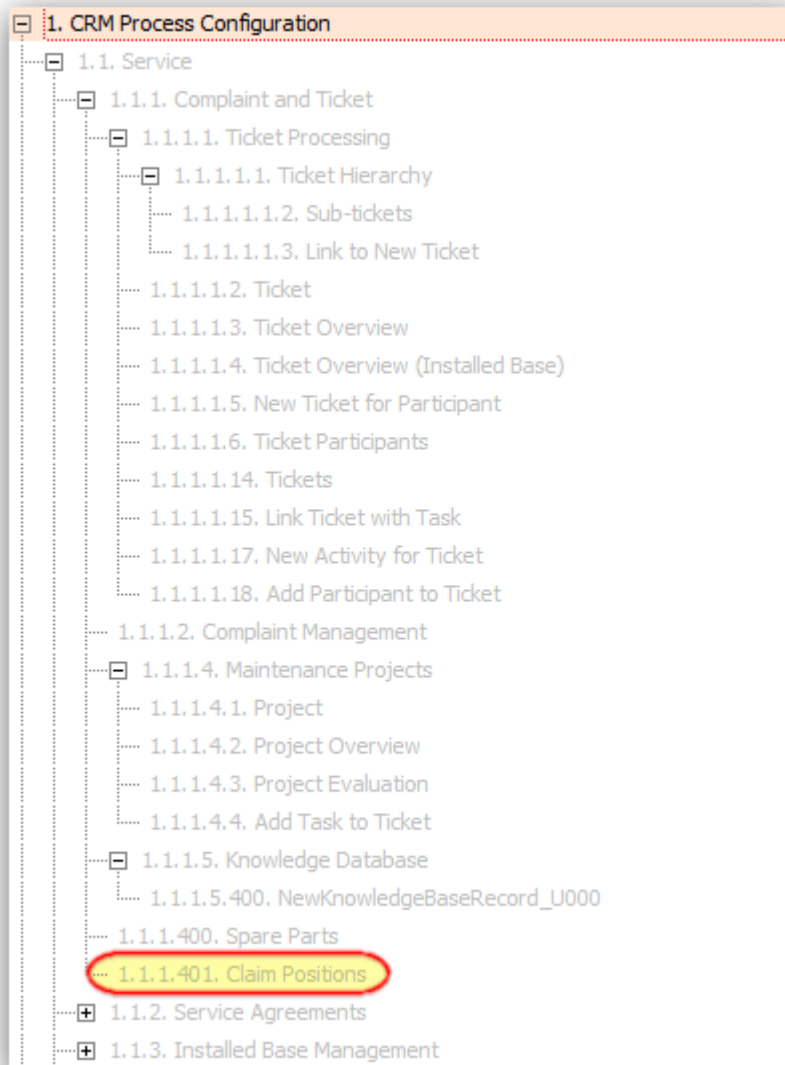


The template configuration table catalog has been extended. New value: "Claim Position Creation Logic".

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.

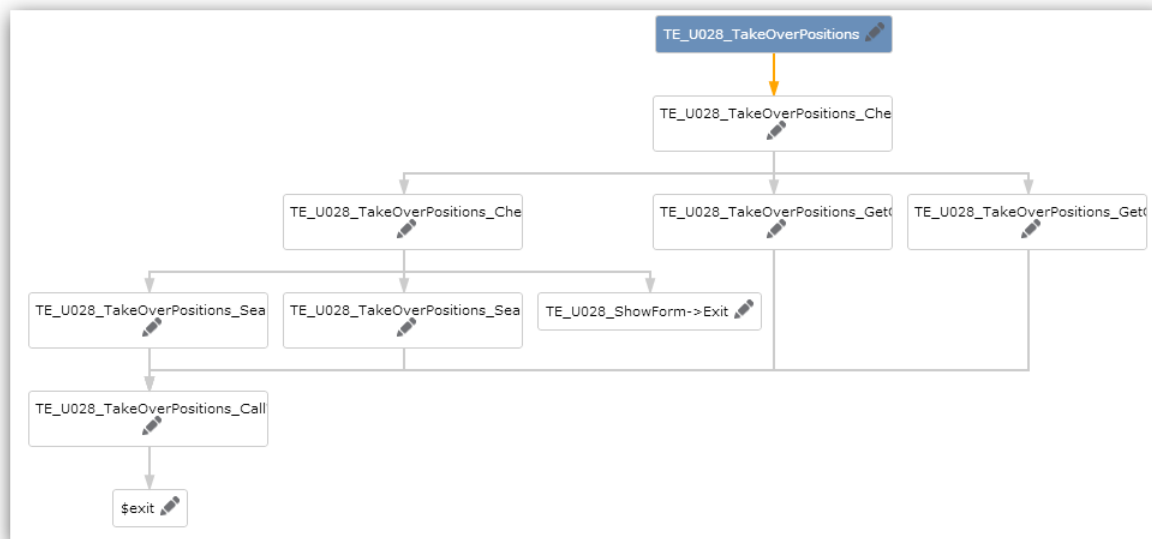
Used designer elements:



| Element      | Name                                          | Usage                                                                                         |
|--------------|-----------------------------------------------|-----------------------------------------------------------------------------------------------|
| Button       | TE_U028_ChangeSelection                       | Calls "TE_U028_TakeOverPositions" 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:

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                                                                                                           |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>• TE_KM_TicketMgmt_AcceptTicket</li><li>• TE_KM_TicketMgmt_CloseTicket</li><li>• TE_KM_TicketMgmt_CompleteTicket</li><li>• TE_KM_TicketMgmt_DeclineTicket</li><li>• TE_KM_TicketMgmt_DispatchManually</li><li>• TE_KM_TicketMgmt_Manage</li><li>• TE_KM_TicketMgmt_ManualEscalation</li><li>• TE_KM_TicketMgmt_NewServiceOffer</li><li>• TE_KM_TicketMgmt_NewServiceOffer_Sublist</li><li>• TE_KM_TicketMgmt_NewServiceReport</li><li>• TE_KM_TicketMgmt_NewServiceReport_Sublist</li><li>• TE_KM_TicketMgmt_OpenDispatchingDashboard</li><li>• TE_KM_TicketMgmt_QualifyTicket</li><li>• TE_KM_TicketMgmt_ReOpenTicket</li><li>• TE_KM_TicketMgmt_SendEmail</li><li>• TE_KM_TicketMgmt_StopEscalation</li><li>• TE_KM_TicketMgmt_TicketInProgress</li><li>• TE_KM_TicketMgmt_TicketIsQualified</li><li>• TE_KM_TicketMgmt_TicketIsSolved</li></ul> <p>JavaScript:</p> <ul style="list-style-type: none"><li>• \web\scripts\te.isi\processes\TE_KM_TicketMgmt.js</li></ul> <p>CSS:</p> <ul style="list-style-type: none"><li>• \web\styles\te.isi\update.css</li></ul> <p>Images:</p> | <ul style="list-style-type: none"><li>• TE_TicketMgmt_PhaseMapping</li><li>• TE_TicketMgmt_KMEmails_Phase1</li><li>• TE_TicketMgmt_KMEmails_Phase1_Active</li><li>• TE_TicketMgmt_KMServiceOffers_Phase2</li><li>• TE_TicketMgmt_KMServiceOffers_Phase2_Active</li><li>• TE_TicketMgmt_KMServiceReports_Phase5</li><li>• TE_TicketMgmt_KMServiceReports_Phase5_Active</li><li>•</li></ul> <p>Actions:</p> |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• TE_KM_Status_0</li> <li>• TE_KM_Status_1</li> <li>• TE_KM_Status_2</li> <li>• TE_KM_Status_3</li> <li>• TE_KM_Status_4</li> <li>• TE_KM_Status_5</li> <li>• TE_KM_Status_6</li> <li>• TE_KM_Status_130</li> <li>• TE_KM_Status_131</li> <li>• TE_KM_8drelevant_true</li> <li>• TE_KM_Overdue</li> <li>• TE_KM_TicketMgmt_Accept</li> <li>• TE_KM_TicketMgmt_Decline</li> <li>• TE_KM_TicketMgmt_MA_s</li> <li>• TE_KM_TicketMgmt_TPR2_s</li> <li>• TE_KM_TicketMgmt_TPR3_s</li> <li>• TE_KM_validIB_false</li> <li>• TE_KM_validIB_true</li> <li>• TE_KM_validWR_false</li> <li>• TE_KM_validWR_true</li> <li>• TE_KM_validWRatIB_false</li> <li>• TE_KM_validWRatIB_true</li> </ul> | <ul style="list-style-type: none"> <li>• TE_A_KM_TicketMgmt</li> <li>• TE_A_KM_TicketMgmt_AcceptTicket_QueryState</li> <li>• TE_A_KM_TicketMgmt_CloseTicket_QueryState</li> <li>• TE_A_KM_TicketMgmt_CompleteTicket_QueryState</li> <li>• TE_A_KM_TicketMgmt_DispatchingDashboard_QueryState</li> <li>• TE_A_KM_TicketMgmt_ManualDispatching_QueryState</li> <li>• TE_A_KM_TicketMgmt_ManualEscalation_QueryState</li> <li>• TE_A_KM_TicketMgmt_NewServiceOffer_QueryState</li> <li>• TE_A_KM_TicketMgmt_NewServiceReport_QueryState</li> <li>• TE_A_KM_TicketMgmt_QualifyTicket_QueryState</li> <li>• TE_A_KM_TicketMgmt_ReOpenTicket_QueryState</li> <li>• TE_A_KM_TicketMgmt_SendEmail_QueryState</li> <li>• TE_A_KM_TicketMgmt_StopEscalation_QueryState</li> <li>• TE_A_KM_TicketMgmt_TicketInProgress_QueryState</li> <li>• TE_A_KM_TicketMgmt_TicketIsQualified_QueryState</li> <li>• TE_A_KM_TicketMgmt_TicketIsSolved_QueryState</li> </ul> |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

### How are the elements listed above working together?

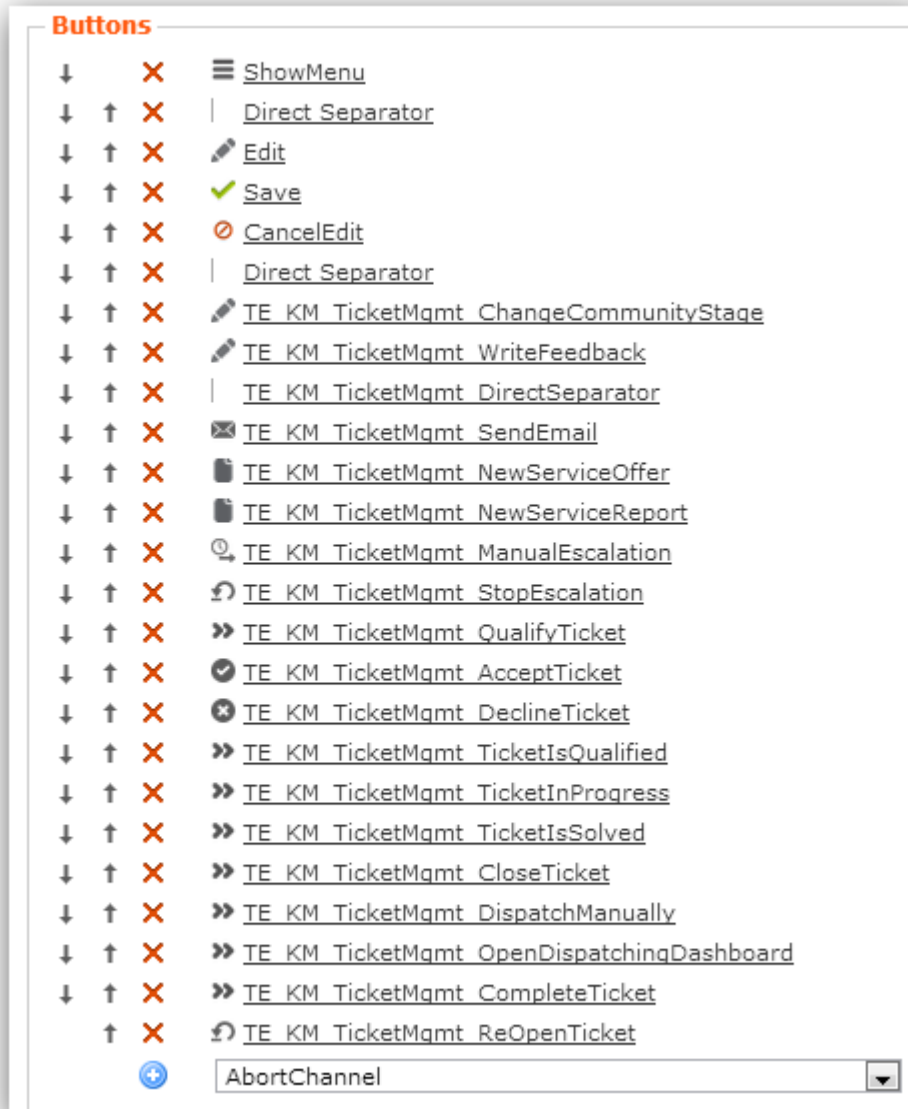
Starting the ticket process, the data provider delivers the uid of the Ticket and some other parameters (eg. Phase). The delivered phase could be customized for every project. This is done using the “TE\_TicketMgmt\_PhaseMapping” variable.

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.



| Source | Condition                                        | Next Step                                      | Arguments |
|--------|--------------------------------------------------|------------------------------------------------|-----------|
| Step   | \$.get('command') == "Proceed/SendEmail"         | TE_KM_TicketMgmt_SendEmail                     |           |
| Step   | \$.get('command') == "Proceed/QualifyTicket"     | TE_KM_TicketMgmt_QualifyTicket_CheckFields     |           |
| Step   | \$.get('command') == "Proceed/TicketIsQualified" | TE_KM_TicketMgmt_TicketIsQualified_CheckFields |           |
| Step   | \$.get('command') == "Proceed/DispatchManually"  | TE_KM_TicketMgmt_DispatchManually              |           |
| Step   | \$.get('command') == "Proceed/ManualEscalation"  | TE_KM_TicketMgmt_ManualEscalation              |           |
| Step   | \$.get('command') == "Proceed/AcceptTicket"      | TE_KM_TicketMgmt_SetPhase5                     |           |
| Step   | \$.get('command') == "Proceed/DeclineTicket"     | TE_KM_TicketMgmt_DeclineTicket                 |           |
| Step   | \$.get('command') == "Proceed/TicketInProcess"   | TE_KM_TicketMgmt_TicketInProcess               |           |

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_ChangeCommunityS-<br>tage                     | -                                                                   |
| Fieldgroup   | TE_KM_Social_ChangeCommunityS-<br>tage                     | -                                                                   |
| Headergroup  | TE_KM_Social_ChangeCommunityS-<br>tage                     | -                                                                   |
| ExpandConfig | TE_MA_Social_NewCommunityAn-<br>swer                       | -                                                                   |
| Fieldgroup   | TE_MA_Social_NewCommunityAn-<br>swer                       | -                                                                   |
| ExpandConfig | TE_MA_Social_NewCommunitySolu-<br>tion                     | -                                                                   |
| Fieldgroup   | TE_MA_Social_NewCommunitySolu-<br>tion                     | -                                                                   |
| Headergroup  | TE_MA_Social_TE_MA_Social_New-<br>CommunityAnswer/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_WriteFeedback_QueryState        | Query state action for linked button |
| MenuAction   | TE_A_KM_TicketMgmt_ChangeCommunityStage_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'.

**Rights**

Access Rights: TE\_SR Central  Override station rights

Extends:  Override group rights

Global Extension: CU\_SR\_Central\_Global\_Extension  Override rep rights

Local Extension:  Further Settings...

Inheritance:   Further Settings inheritance

| Info Area | Deny Access | Deny New | Deny Update | Deny Deletion | Condit. Access | Condit. New | Condit. Update | Condit. Delete | Implicit Hierarch | Create Default | Fields | Cond. Fields | Triggers | Workflow | Log |
|-----------|-------------|----------|-------------|---------------|----------------|-------------|----------------|----------------|-------------------|----------------|--------|--------------|----------|----------|-----|
| Ticket    |             | ✓        | ✓           | ✓             |                |             | ✓              | ✓              |                   | ✓              | ✓      | ✓            | ✓        | ✓        |     |

**Workflow:Ticket**

|   | Name                                     | Dependent | With Conditions | New | Upd | Delete | Old Condition |
|---|------------------------------------------|-----------|-----------------|-----|-----|--------|---------------|
| 0 | TE_KM_CheckWarranty_NEW                  |           |                 | ✓   |     |        |               |
| 1 | TE_KM_CheckWarranty_UPD                  |           |                 |     | ✓   |        |               |
| 2 | TE_KM_Create_Tools                       |           |                 | ✓   | ✓   |        |               |
| 3 | TE_KM_email_on_emergency                 |           | ✓               | ✓   |     |        |               |
| 4 | TE_KM_WriteLastServicevisitToInstalledba |           | ✓               |     | ✓   |        |               |
|   | New Line                                 |           |                 |     |     |        |               |

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 actual 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

Menu 'ID\_NET\_DISPACHING\_DASHBOARD'

Configuration: TE\_ISI  
CRM Processes: Dispatching (B\_500000310)  
Info Area: Dispatching Dashboard  
QuickLink Context: Dispatching Dashboard  
Image: Dispatching Dashboard  
Visible:

Action: Action for Menu ID\_NET\_DISPACHING\_DASHBOARD  
Description: Action Template: DispatchingDashboard  
Dispatching Dashboard History: MR, 2013-07-30: created, added scale argument  
Pass arguments as an object

Input Arguments:

- refreshListAfterDrop: true
- repGroupingOptions: { "items": [ { "textId": "TXT\_net\_resourceplan\_text\_3" }, { "text": "Department", "key": 1, "infoAreaId": "ID", "fieldIds": ["OrgGrpID"], "tableCaption": "..." } ] }
- copyFields: ServiceDuration:Duration;ServiceDurationUnit:Unit;Title:Subject;ProblemDescription:Text
- defaultFieldValuesForMA: Contact:130;Purpose:S;
- defaultFilterName: KM.StatusDispatching
- searchAndListName: TE\_KM\_Dispatching\_Dashboard
- maxRows: 5
- showSearch: false
- autoSearch: true
- CreateNewTab: { "refresh": false, "reuseId": "ID\_NET\_DISPACHING\_DASHBOARD" }

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 Skills

Product Group: [dropdown] Problem Group: [dropdown]  
Product: [dropdown] Problem: [dropdown]  
Item No.: [dropdown] Language: [dropdown]  
+ Add more ... [dropdown] With me:

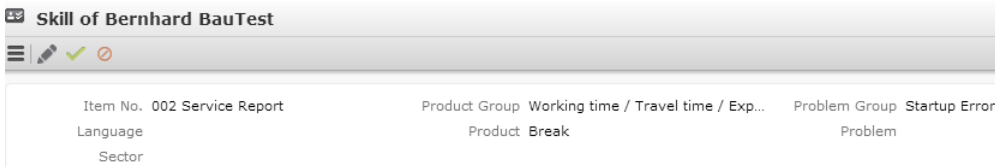
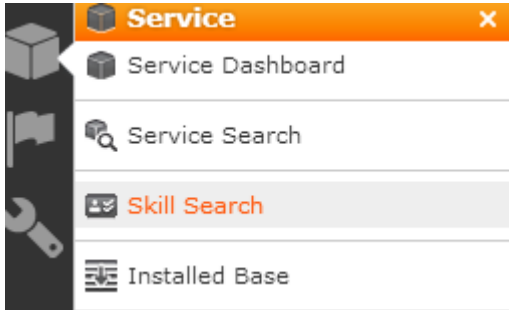
max. 15 Records per page [Reset] [Start Search]

Search Results << 1 - 15 of 15+ >> [dropdown] [gear]

| Rep               | Product Group           | Product          | Problem Group | Problem                  | Language |
|-------------------|-------------------------|------------------|---------------|--------------------------|----------|
| Lena Lotus        |                         |                  | Other         |                          |          |
| Simon Seller Test |                         |                  | Startup Error | Startup with Error Me... |          |
| Harry HelperTest  |                         |                  | Startup Error | Startup with Warning...  |          |
| Berta Basis Test  | Automatic Lathe         | Automatic Lathes |               |                          | German   |
| Mona MarketTest   | Automatic Lathe         | Automatic Lathes | Startup Error | Startup with Error Me... |          |
| Bernhard BauTest  | Working time / Trave... | Break            | Startup Error |                          |          |
| Paul ProjectTest  | Automatic Lathe         |                  |               |                          |          |

## Search&List of SI

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

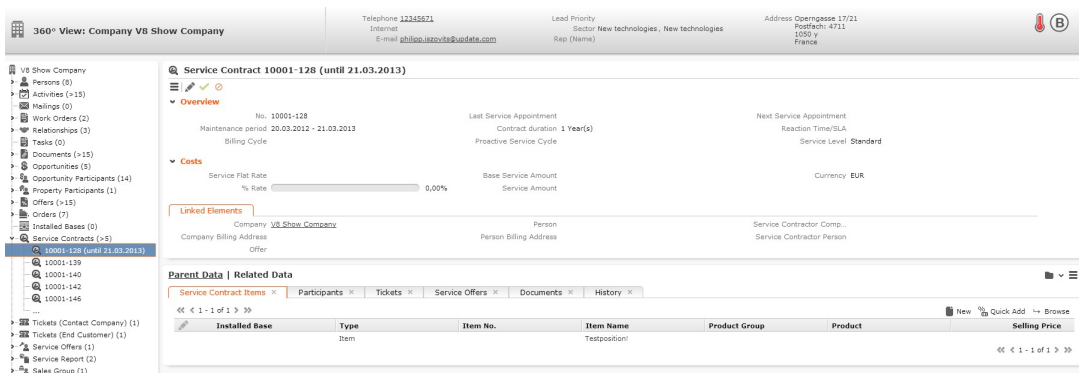


Details Mask of SI with record selector on the Item No. field:

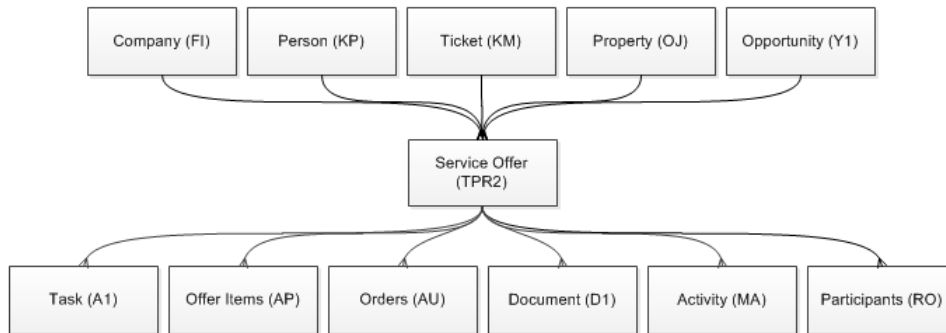
```
selectRecord({ from: {
 infoAreaId: "AR", selectionMode: "single", useAutoSearch: true
},
target: {
 copyFields: { 3: 0,
 6: 3,
 7: 4
}
}
});
```

## 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: "SB", "BC" or "FS".
 -->
 <Vertical>&VERTICAL;</Vertical>

 <DataBase>
 <LockFieldAttributes>Hidden</LockFieldAttributes>
 <Schema>
 <CustomFields>customfields.xml</CustomFields>
 </Schema>
 <VirtualSchema>
 <!-- ISI-TEMPLATE Virtual Infoareas must start with "I..." ! -->
 <!-- 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:



Search Service Offers

Offer No. \_\_\_\_\_ Version \_\_\_\_\_  
 Sales Rep \_\_\_\_\_ Offer Date \_\_\_\_\_  
 Stage \_\_\_\_\_ Type \_\_\_\_\_  
 Items I Own

Reset Start Search

| Company                                               | Type       | Offer Date | Stage                         | Currency | Offer Value   |
|-------------------------------------------------------|------------|------------|-------------------------------|----------|---------------|
| Printverlag AG                                        | Main Offer | 27.06.2012 | 0 - Creation                  | EUR      | 200,00        |
| Printverlag AG                                        | Main Offer | 27.06.2012 | 0 - Creation                  | EUR      | 400,00        |
| Printverlag AG                                        | Main Offer | 01.03.2012 | 0 - Creation                  | EUR      | 8.109,50      |
| Pumpsystems Inc.                                      | Main Offer | 23.02.2012 | 0 - Creation                  | EUR      | 8.109,50      |
| new company GmbH                                      | Main Offer | 23.07.2012 | 0 - Creation                  | EUR      | 997,00        |
| new company GmbH                                      | Main Offer | 23.07.2012 | 0 - Creation                  | EUR      | 997,00        |
| Hotel Imperial                                        | Main Offer | 25.10.2012 | 0 - Creation                  | EUR      | 31.997,00     |
| update software AG                                    | Main Offer | 18.01.2012 | 0 - Creation                  | EUR      | 997,00        |
| Coca-Cola Austria                                     | Main Offer | 27.11.2012 | 0 - Creation                  | EUR      | 997,00        |
| Philips Testfirma                                     | Main Offer | 12.12.2012 | 0 - Creation                  | EUR      | 997,00        |
| Printverlag AG                                        | Main Offer | 15.03.2012 | 1 - Offer Items (In progress) | EUR      | 1.000,00      |
| Cranes inc.                                           | Main Offer | 04.11.2011 | 1 - Offer Items (In progress) | EUR      | 10.143.400,00 |
| Coca-Cola Austria                                     | Main Offer | 07.11.2012 | 1 - Offer Items (In progress) | EUR      | 997,00        |
| Softdrink IT Group GmbH                               | Main Offer | 08.11.2012 | 1 - Offer Items (In progress) | EUR      | 1.217,00      |
| IBM Deutschland Business Transformation Services GmbH | Main Offer | 08.11.2012 | 1 - Offer Items (In progress) | EUR      | 1.217,00      |

Open data entries in the FI tree

Search Service Offers Company Printverlag AG

Telephone 42369 Internet Lead Priority Sector Address Untersbergstr.5 1040 Wien Austria  
 E-mail info@printtech.at Sales Rep Sandra ServiceTest

360° View for Company Printverlag AG

Printverlag AG  
 Persons (6)  
 Activities (>15)  
 Tasks (0)  
 Document Links (>15)  
 Additional Addresses (0)  
 Opportunities (2)  
 Opportunity Participants (12)  
 Property Participants (0)  
 Offers (16)  
 Orders (11)  
 Service Offers (>5)

Service Offer No. 10001-2120001001-1

Overview  
 Offer No. 10001-2120001001-1 Type Main Offer Contact person  
 Offer Date 08.11.2012 Status Open Sales Rep TE ISI  
 Valid To 07.01.2013 Stage 3 - Waiting for Transmission Type of service charge  
 Reminder Date Template

Price  
 Price List Standard Discount Purchase Price 36.525,00  
 Currency EUR Discount (%) 0,00% Margin 13.575,00  
 Paym. Conditions 30 days Reason for Discount Margin (%) 27,00%  
 Net Total 50.100,00 Offer Value 50.100,00  
 VAT abs.  
 Offer value including ... 50.100,00

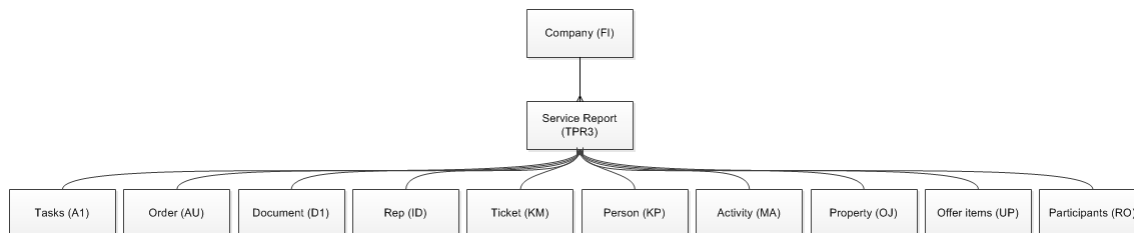
Comment Discount Ext. System Link  
 Text SERVICE QUOTE TEMPLATE | DO NOT DELETE !!!!

Parent Data | Related Data  
 Offer Items Participants Activities Tasks Documents Orders History

| Item | AP-SerNo | Item No. | Item Descrip... | Product Group | Product | Quantity | Selling Price | Item Value |
|------|----------|----------|-----------------|---------------|---------|----------|---------------|------------|
| 2    | 13675    | E001     | Break           |               |         | 1,00     | 15.500,00     | 15.500,00  |

## Service Reports

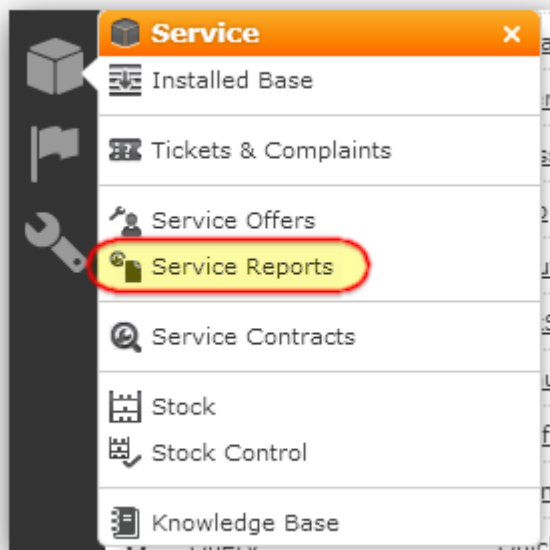
Learn about the new service reports.



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

```
<VirtualSchema>
<!-- ISI-TEMPLATE Virtual Infoareas must start with "T..." ! -->
<!-- Company Competitor FI -->
<InfoArea infoAreaId='VF11' physicalInfoAreaId='FI' name='Competitor' fieldId='167' fieldType='K' value='Competitor (BASE)' tenantNo='9000'/>
<!-- Offer Types FR -->
<InfoArea infoAreaId='VFR1' physicalInfoAreaId='FR' name='Service Contract Offer' fieldId='5029' fieldType='K' value='Service Contract Offer (BASE)' tenantNo='9000'/>
<InfoArea infoAreaId='VFR2' physicalInfoAreaId='FR' name='Service Quote' fieldId='5029' fieldType='K' value='Service Offer (BASE)' tenantNo='9000'/>
<InfoArea infoAreaId='VFR3' physicalInfoAreaId='FR' 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='' -->
```

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



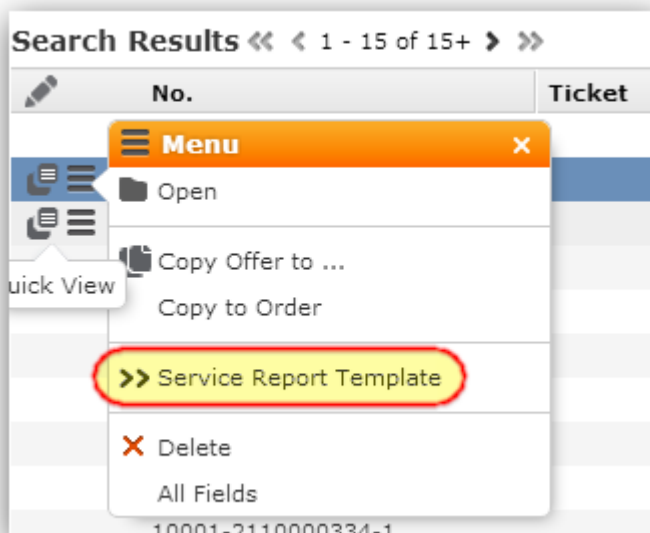
**Menu TE\_ID\_NET\_SearchServiceReport**

✓ Save ✗ Delete

Text	Service Reports	
Configuration	TE_ISI	
CRM Processes	Service Report	✗
Info Area		
QuickLink Context		
Image	INFOAREA_TPR3	
	<input checked="" type="checkbox"/> Visible	
Action	Search	✗
Description	Action to Search for Service Reports History: MR 08.02.2013: created	

## 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.



**Menu TE\_A\_PR\_ChooseServiceReportTemplate**

✔ Save ✘ Delete

Text Service Report Template ✎  
 Configuration **TE\_ISI**  
 CRM Processes Admin Application Menu (1.5.400\_Admin... 🔍 ✘  
 Info Area PR  
 QuickLink Context  
 Image TE\_PR\_Stage\_8 📎 ✎  
 Visible  
 Action **Workflow** ✎ ✘  
 Description Action to select a new Service Report Template

**Referenced by**  
 Menus M Offer, TE M ServiceReport  
 Expand no reference  
 SearchAndList no reference  
 TreeView no reference

**Action for Menu TE\_A\_PR\_ChooseServiceReportTemplate**

Action Template Workflow ▼  
 Executes a workflow  
 Pass arguments as an object ?

Input Arguments ☰

<b>! name</b>	<u>TE_PR_ChooseServiceReportTempl...</u>
uid	<u>Record</u> <span style="float: right;">▼</span>
callbackFunction	<u>javascript:u8.TeISI.CallbackFunctio...</u>
<b>+ New Argument</b>	<u>javascript:u8.TeISI.CallbackFunctions.showInfoMessage("TE_ACTIONS", 171, 369)</u>

Output Arguments ☰

<b>+ New Argumentname</b>	<u></u>
---------------------------	---------

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

Mandant	Spe 0001 TE_Base	Spe 0100 TE_German	Spe 0101 TE_English	Spe 0102 TE_French
9000	Duration in days before ticket created (BA)	Dauer in Tagen, bevor das Ticket erstellt v	Duration in days before the ticket should l	Durée en jours avant
9000	Service Offer Creation Logic (BASE)	Service Angebot Erstellungslogik	Service Offer Creation Logic	
9000	Service Offer Template (BASE)	Service Angebot Vorlage	Service Offer Template	
9000	Service Report Creation Logic (BASE)	Service Report Erstellungslogik	Service Report Creation Logic	
9000	Service Report Template (BASE)	Service Report Vorlage	Service Report Template	

Configuration - Ticket - Service Report Creation Logic

Overview

Configuration Cat... Ticket Country \_\_\_\_\_ Active

Configuration Opt... Service Report Creation Logic Business Area \_\_\_\_\_ Rep \_\_\_\_\_

Details

Description Configuration Record to configure how a Service Report should be created

Comment Log 1 = Check Service Offers // Log 2 = Check Service Report Template // Log 3 = Check Spare Parts of Ticket // Log 4 = Check Service Contract

Special Parameter

Log 1 <input checked="" type="checkbox"/>	Text 1 _____	Time 1 _____
Log 2 <input checked="" type="checkbox"/>	Text 2 _____	Time 2 _____
Log 3 <input checked="" type="checkbox"/>	Number 1 _____	Time 3 _____
Log 4 <input checked="" type="checkbox"/>	Number 2 _____	Time 4 _____
Dec 1 _____	Sort 1 _____	
Dec 2 _____	Sort 2 _____	

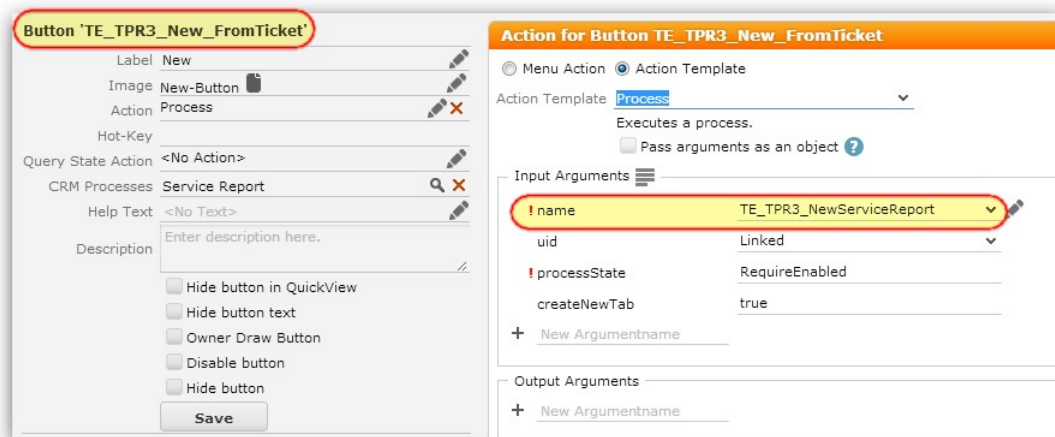
Log1 Service offer(s) are taken as the base for creating the service report

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)



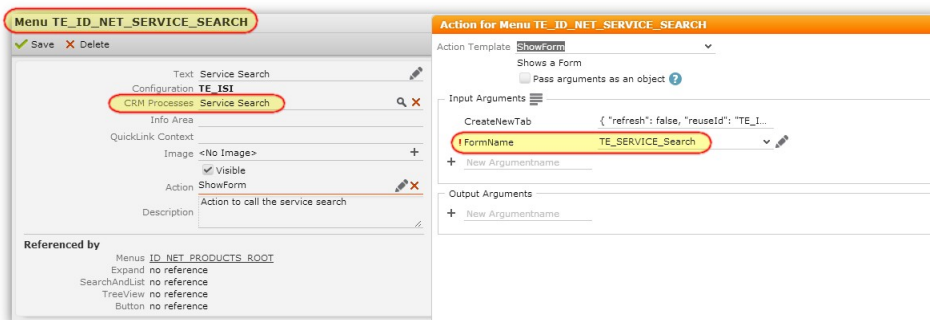
If this new field is “true”, then the “PR\_UPD\_SetStatusInTPR3” trigger sets the new Status-field (5045) to “Signed”. PR/5045 (Status)

This new catalog is set only with Triggers(PR\_UPD\_ServiceReportAccounting,PR\_UPD\_ServiceReportSigned, PR\_UPD\_ServiceReportClosed).

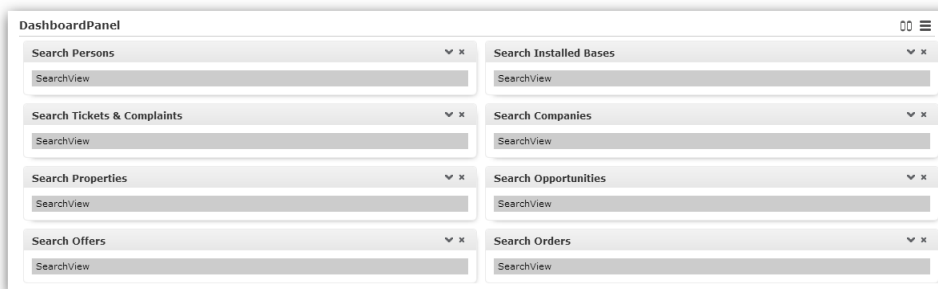
## Service Search

Learn about the new application menu entry for service search.

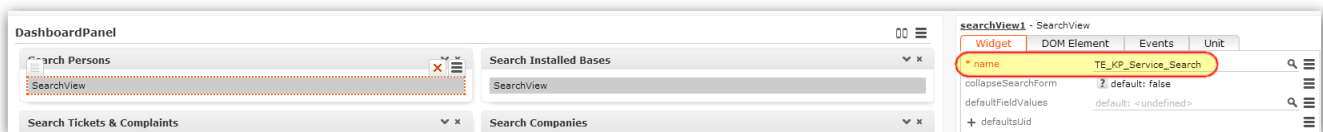
A new application menu entry has been created. This action calls the “TE\_SERVICE\_Search” form. The menu action could be hidden by disabling the “Service Search” CRM process in the process configuration of the dependent login role.



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



All Search&Lists are using this syntax:



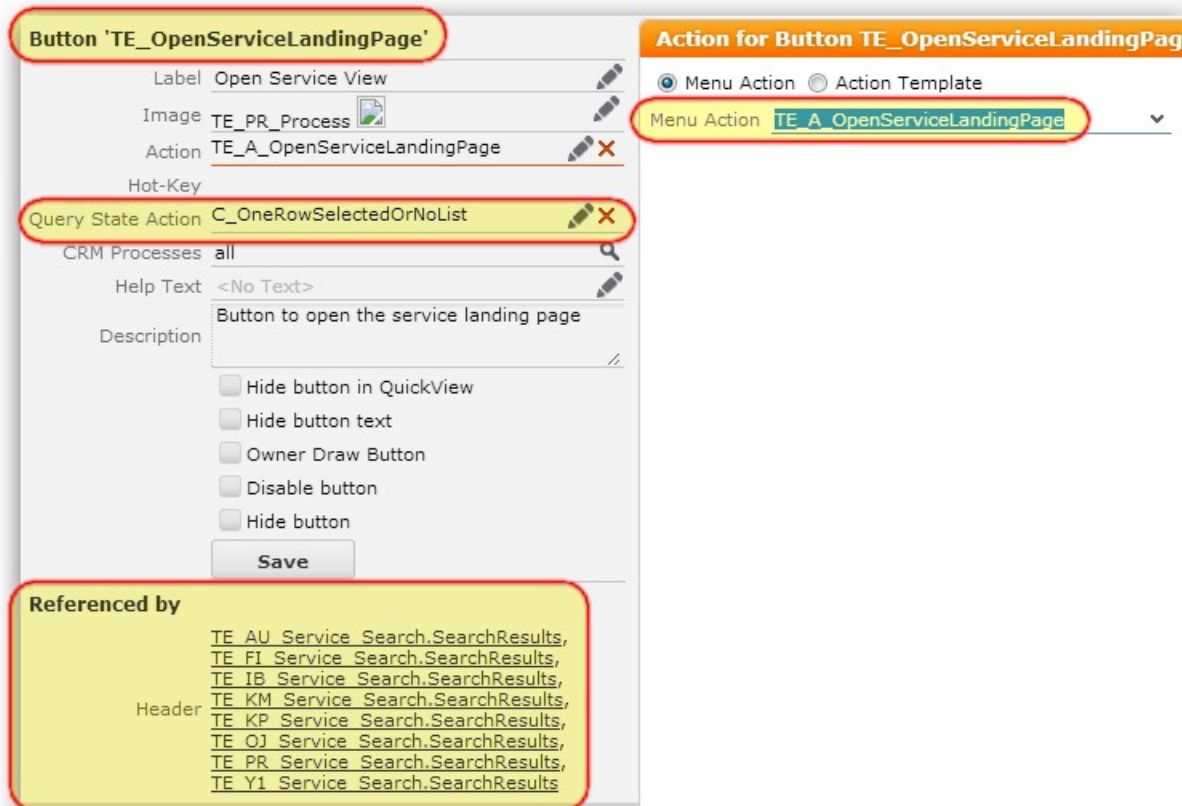
The following Search&List configs have been created:

- 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

^ Action ?  
Action Template **ShowForm**

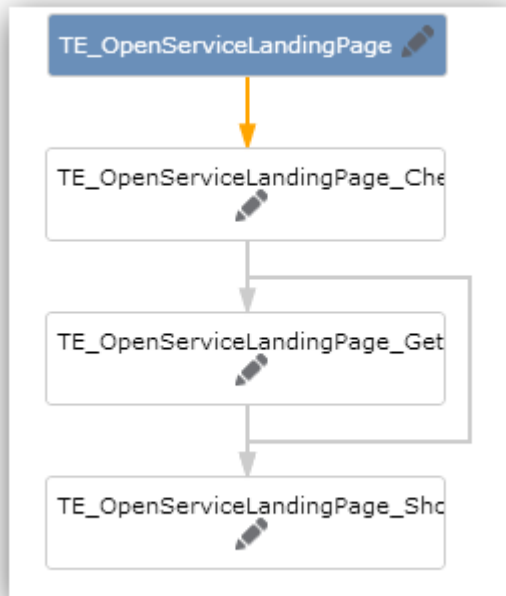
Shows a Form  
 Pass arguments as an object ?  
 End process with this action

Source	Value	Name
! Constant Value	TE_SERVICE_LandingPage	FormName
Constant Value	TE_SERVICE_LandingPage	HeaderName
X Input Message	as is	displaySecondRecord
X Input Message	as is	displaySecondRecordChe...
X Input Message	as is	firstRecord
X Input Message	as is	firstRecordAllowEdit
X Input Message	as is	firstRecordExpand
X Input Message	as is	relatedViewHeader
X Input Message	as is	secondRecord
X Input Message	as is	secondRecordAllowEdit
X Input Message	as is	secondRecordExpand
X Input Message	as is	secondRecordRelatedView...

**firstRecord** - ExpandView

Widget *	DOM Element	Events	Unit
* model			
* uid	\$component(url).#firstRecord		

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**

Save Delete

Label Assign Installed Base to another Custo...

Image Reset

Action Process

Hot-Key

Query State Action C\_OneRowSelectedOrNoList

CRM Processes Installed Base Management (70002...

Help Text <No Text>

Description button which calls a process to assign the installed base to another company

Hide button in QuickView

Hide button text

Owner Draw Button

Disable button

Hide button

**Action for Button TE\_IB\_AssignToAnotherCompany**

Menu Action Action Template

Action Template Process

Executes a process.

Pass arguments as an object ?

Input Arguments

name TE\_IB\_AssignToAnotherCompany

uid Record

processState RequireEnabled

New Argumentname

Output Arguments

New Argumentname

Button:

- TE\_IB\_AssignToAnotherCompany

Process:

- TE\_IB\_AssignToAnotherCompany

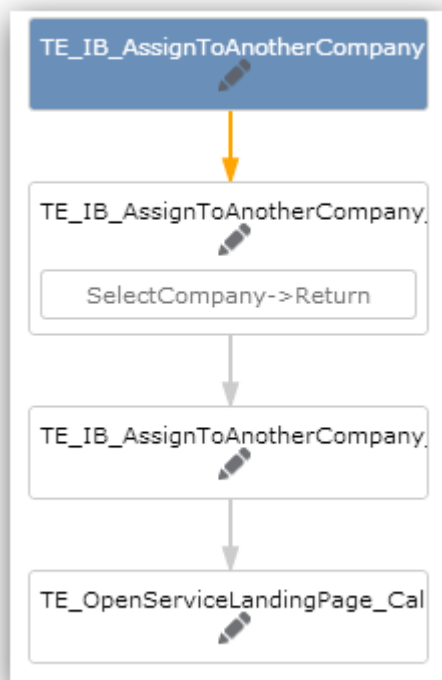
Process Steps:

- TE\_IB\_AssignToAnotherCompany\_SelectFI
- TE\_IB\_AssignToAnotherCompany\_CallWorkflow

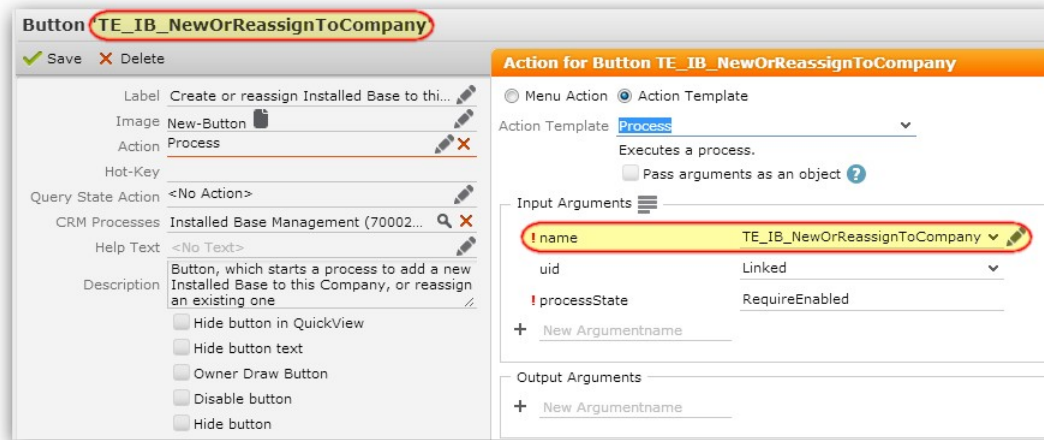
TE\_OpenServiceLandingPage\_CallProcess (used to reopen the service landing page)

Workflow:

- TE\_IB\_ReassignInstalledBase



2nd functionality: Assign an Installed Base to this Customer



Button:

- TE\_IB\_NewOrReassignToCompany

Process:

- TE\_IB\_NewOrReassignToCompany

Process Steps:

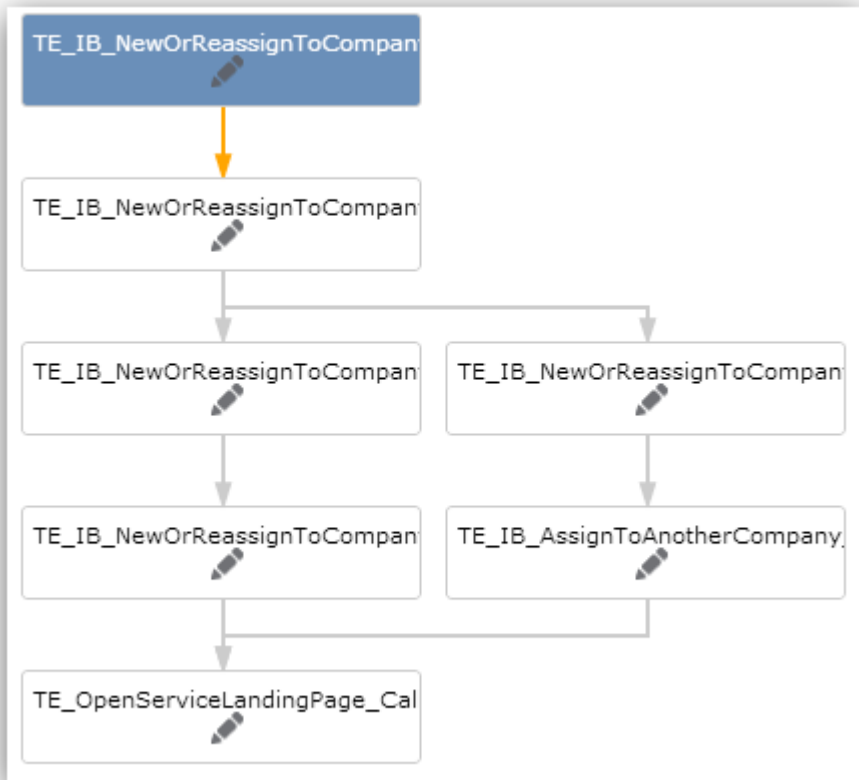
- TE\_IB\_NewOrReassignToCompany\_ProcAsk
- TE\_IB\_NewOrReassignToCompany\_SelectType
- TE\_IB\_NewOrReassignToCompany\_CreateNew
- TE\_IB\_NewOrReassignToCompany\_SelectIB
- TE\_IB\_AssignToAnotherCompany\_CallWorkflow
- TE\_OpenServiceLandingPage\_CallProcess (used to reopen the service landing page)

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.

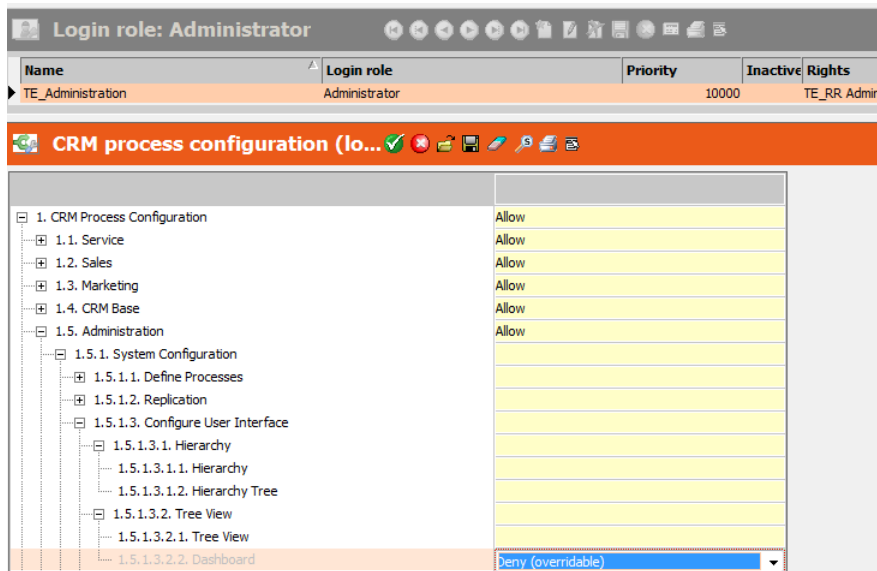


### Dashboard(CRM 50050030)

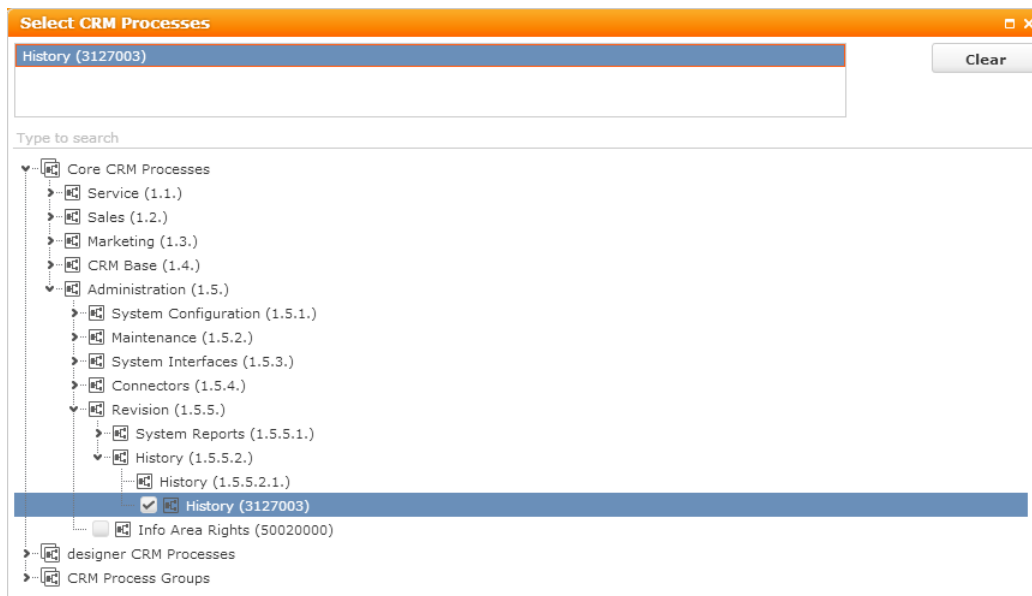
PVCS #73510

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:

	<b>A NotifyRep</b>	Notify Rep	UPDATE_DEFAULT	all	 
	<b>A ViewAllFields</b>	All Fields	TE_CORE	all	 

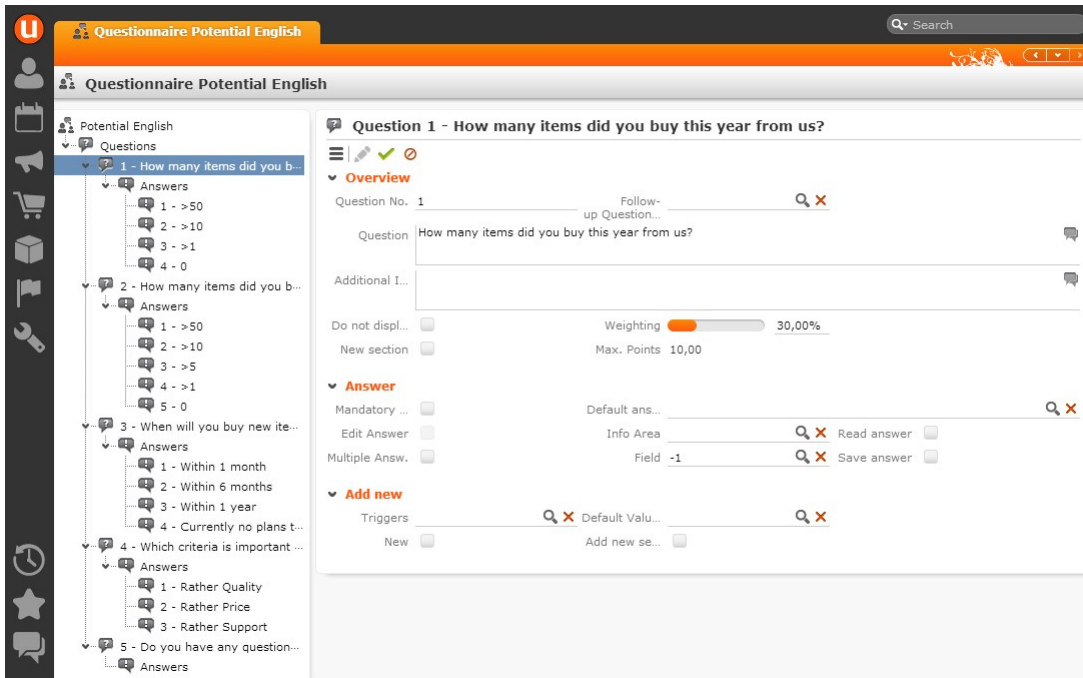
“Notify Rep” is visible in general, “All Fields” is assigned to the “All Fields” CRM process and only visible if the user has access to this process.



## 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:

Process Phases		
<a href="#">Company</a>   <a href="#">Person</a>   <a href="#">Rep</a>   <a href="#">Login</a>   <a href="#">Roles</a>		
Data Providers ?		
Name	Action	
Input Message		
Process Storage		
Process Storage Variables ?		
Name	Data Provider	Value
Fluid	none	
KPuid	none	
IDuid	none	
phase	none	1
phase1_trafficlight	none	0
phase2_trafficlight	none	0
phase3_trafficlight	none	0
phase4_trafficlight	none	0

	Fluid	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 "CORE\_ID\_New" > Phase "Company"**

Phase Name: Company

Disable navigation to preceding phases

Description: Phase to allow the user to select or create a company

Help Text: <No Text>

Phase Label: Select Company

Initial Step: CORE\_ID\_New\_Phase1\_Initial

View Template

---

This phase is active if ... ?

<b>Condition</b>	<b>Data Provider</b>
\$.get("phase") == 1	Process Storage

---

This phase can be activated if ... ?

<b>Condition</b>	<b>Data Provider</b>
\$.get("phase") > 1 && \$.get("phase") < 4	Process Storage

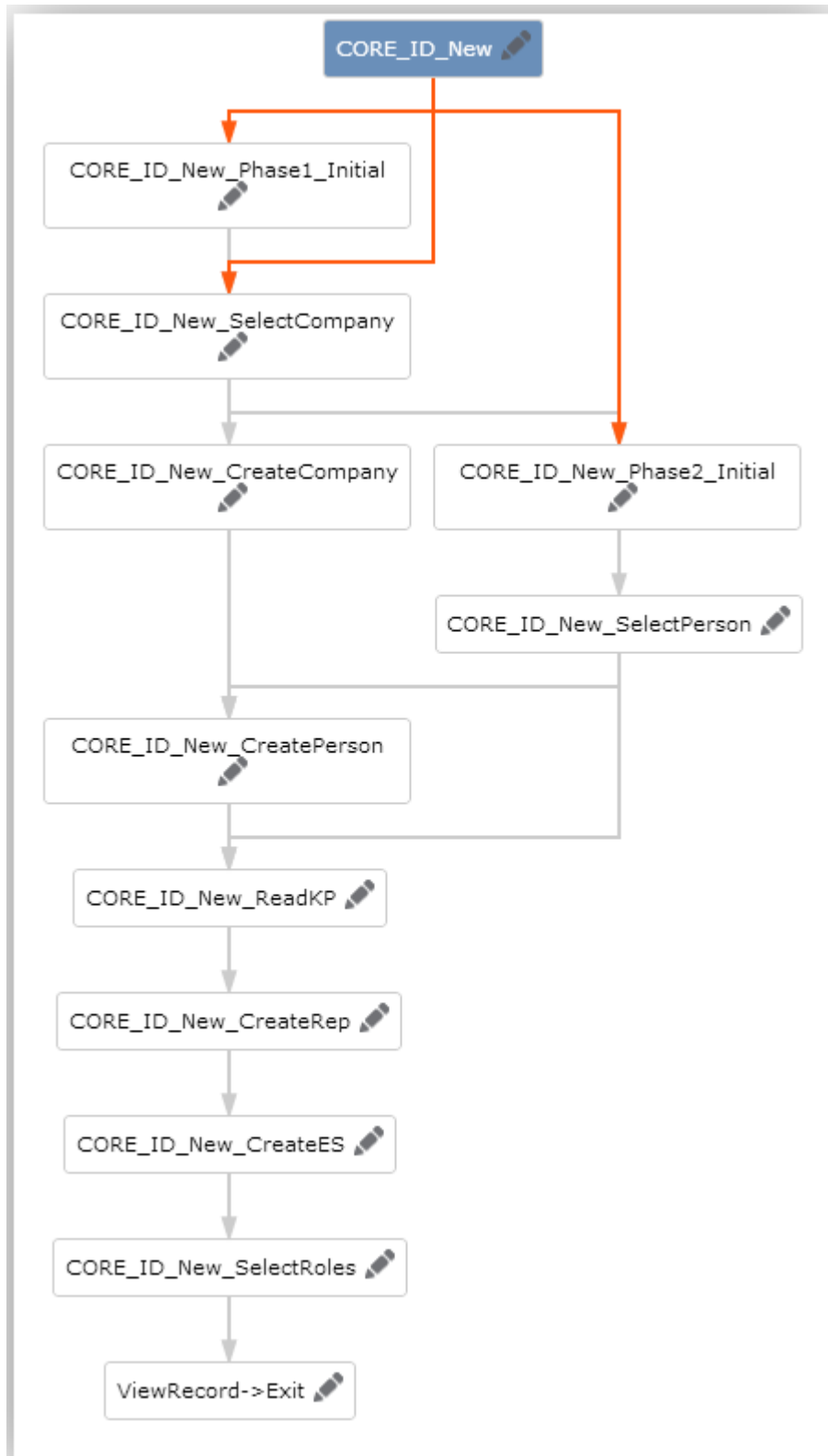
---

Phase Metrics: ?

View	Data Provider	Value	Help Text
<u>PercentageTrafficLight</u>	Process Storage	\$.get("phase1_traffilight")	<No Text>

Cancel

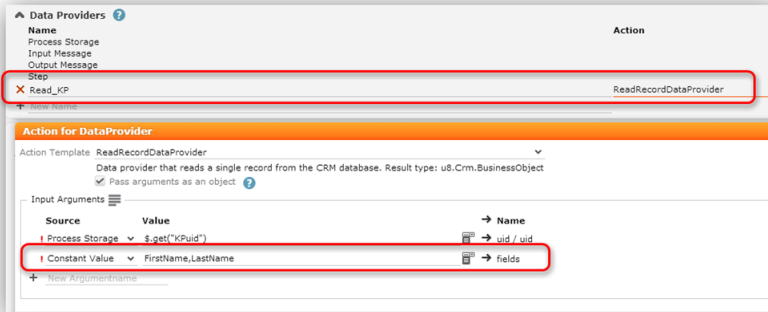
Process Tree:



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:



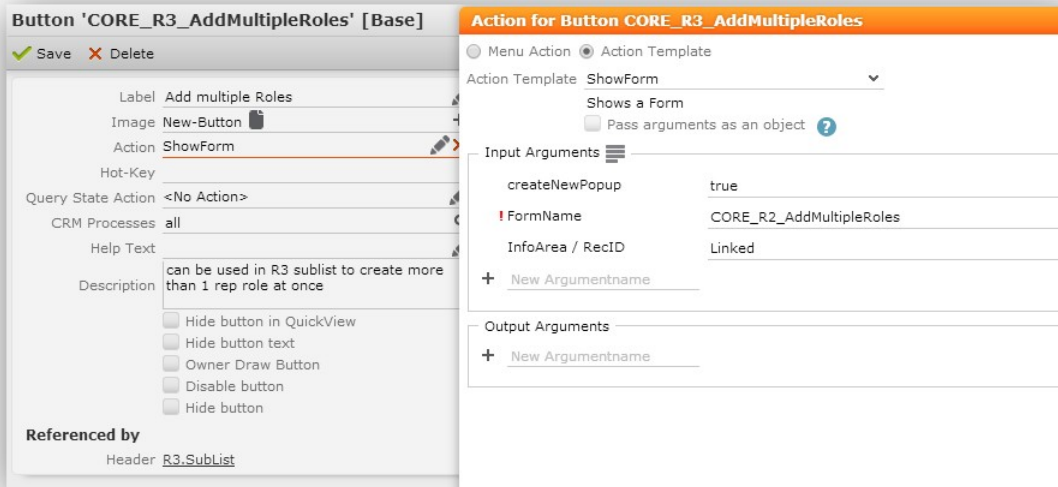
In the “CORE\_ID\_New\_SelectRoles” step we are using a special searchAndList with a special defaultAction and a special contextMenu. This action calls a javascript function which creates rep role record (R3) from the selected login roles. (R2).

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

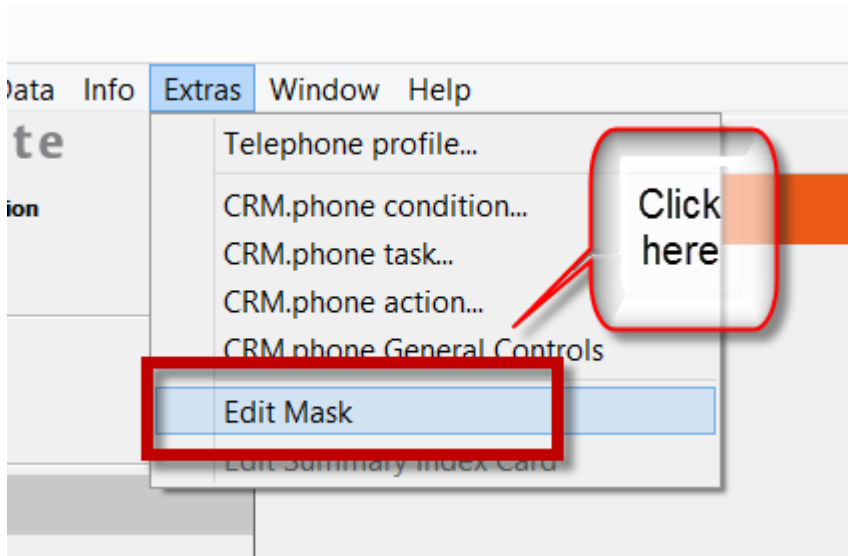
Due to a restriction of the product, the mask needs to be selected by the win user to see it. Please follow steps below:

The image shows a screenshot of a user configuration form. The form is divided into several sections. At the top, there are fields for 'Rep/Group', 'Customer/Country Rights', 'Org. Group', 'Station Access Rights', 'Rep Access Rights', 'Type', 'Name', 'Rights Format', 'Desktop Format', 'ID-TenNo', 'Company', and 'Person'. Below these are fields for 'Form of address', 'First Name', 'E-mail', 'Country Code', 'Postal Code', 'Country', 'Title', 'Last Name', 'Street', 'Area Code', 'City', 'Telephone', and 'Mobile te'. There are also fields for 'Sum Approval Threshold', 'Default Telephone Profile', 'Signature', and 'Active from'. At the bottom, there are checkboxes for 'Enable connector settings', 'Synchronize e-mails', 'Synchronize address book', 'Synchronize appointments', and 'Synchronize tasks'. There are also fields for 'Offline user', 'Initialize offline station', 'Offline Station No.', 'Offline station', and 'User name'. A callout box with a red border and a red arrow points to the 'Offline user' and 'Initialize offline station' fields, with the text 'New fields added in v5' inside the box.

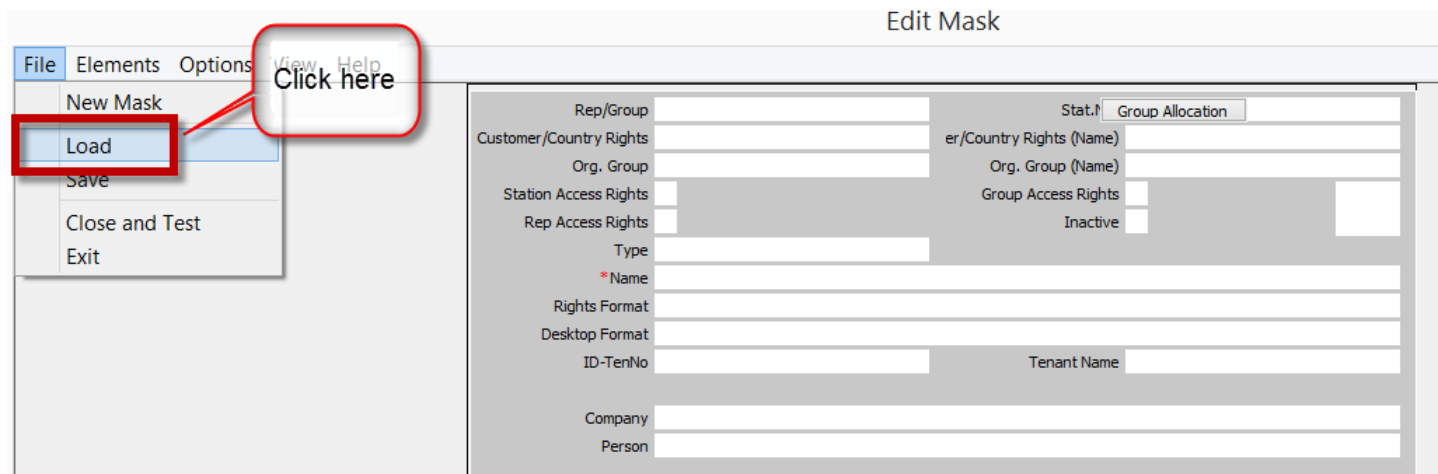


To make use of this mask “ID Maske” you need to go through the following steps:

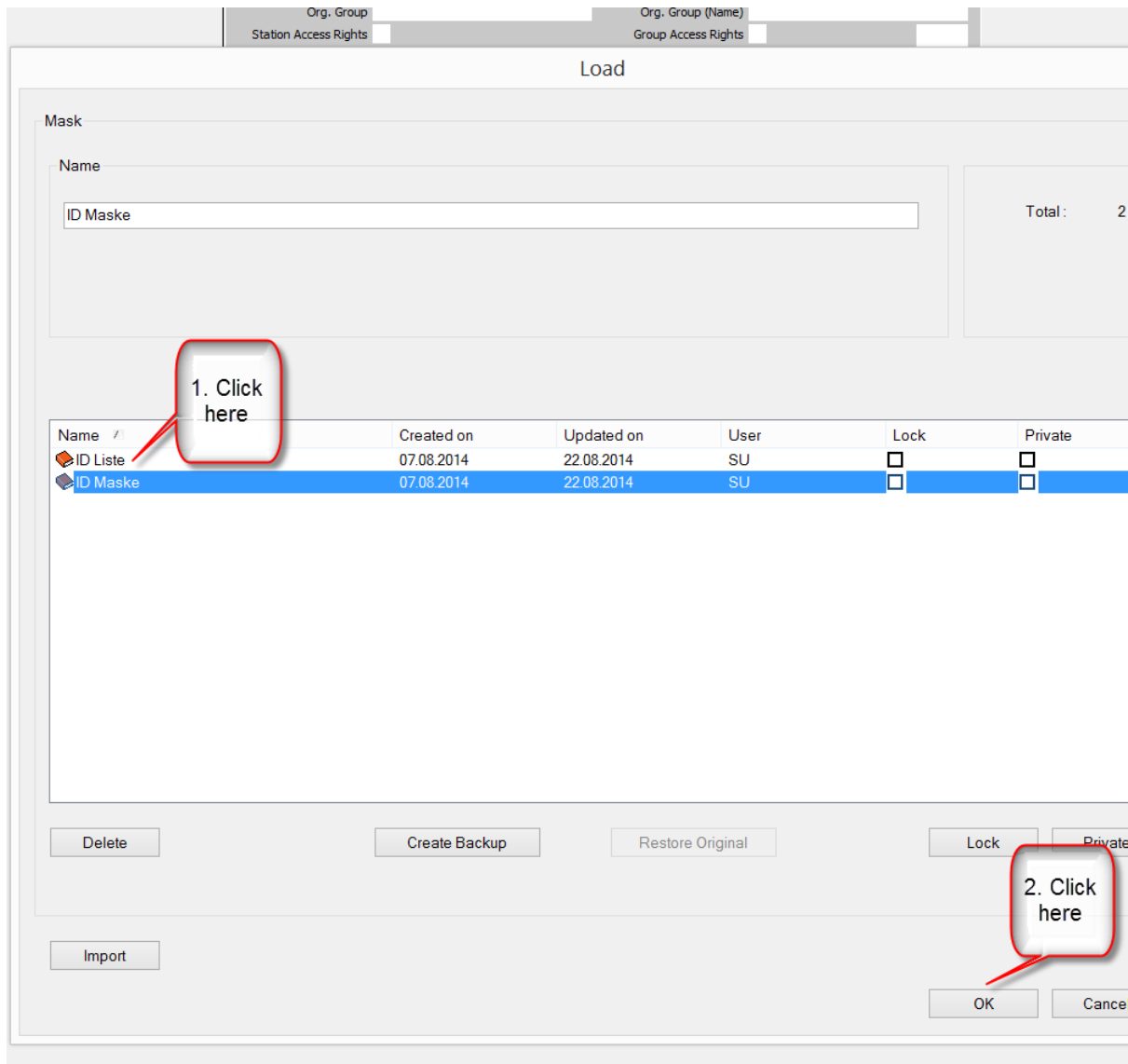
1. Go to Edit Mask in the Extras menu:



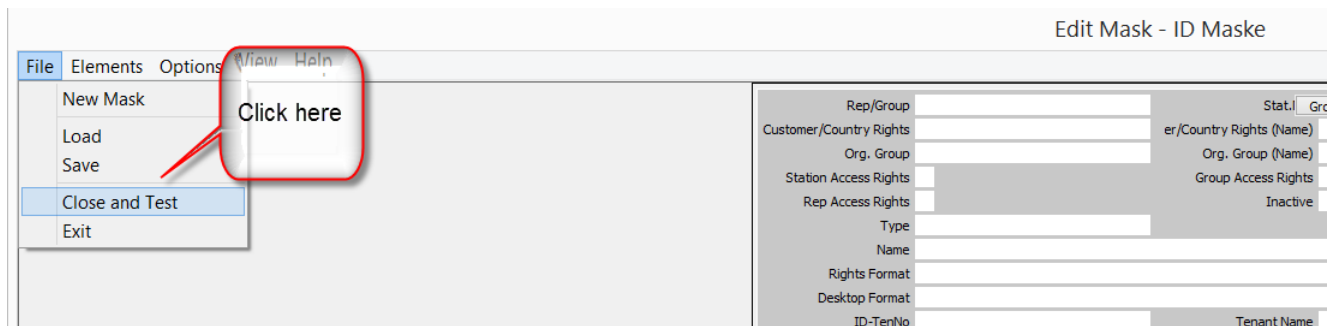
2. Load the mask:



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.

The screenshot shows the CRM process configuration interface for the Administrator role. The interface includes a table with the following columns: Name, Login role, Priority, Inactive, and Rights. The table lists various system configuration options under the '1.5.1.4.21. System Configuration' path, with the 'Rights' column set to 'Deny (overridable)'.

Name	Login role	Priority	Inactive	Rights
TE_Administration	Administrator	10000		TE_RR Admin

Name	Rights
1. CRM Process Configuration	Allow
1.1. Service	Allow
1.2. Sales	Allow
1.3. Marketing	Allow
1.4. CRM Base	Allow
1.5. Administration	Allow
1.5.1. System Configuration	
1.5.1.1. Define Processes	
1.5.1.2. Replication	
1.5.1.3. Configure User Interface	
1.5.1.4. Application Configuration	
1.5.1.4.1. Start Page	
1.5.1.4.2. Start Page	
1.5.1.4.3. Start Page	
1.5.1.4.4. Format	Allow
1.5.1.4.5. Configuration	
1.5.1.4.6. Station configuration	
1.5.1.4.7. Triggers	
1.5.1.4.8. Field Reference	
1.5.1.4.9. Triggers	
1.5.1.4.10. Trigger Fields	
1.5.1.4.11. Workflow	
1.5.1.4.12. Workflow	
1.5.1.4.13. Create Program Group	
1.5.1.4.14. Telephone profile...	
1.5.1.4.15. update CRM phone condition...	
1.5.1.4.16. update CRM phone task...	
1.5.1.4.17. update CRM phone action...	
1.5.1.4.18. update CRM phone General Controls	
1.5.1.4.19. Application Configuration	Allow
1.5.1.4.20. Edit quick links...	
1.5.1.4.21. System Configuration	Deny (overridable)

# 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.

---

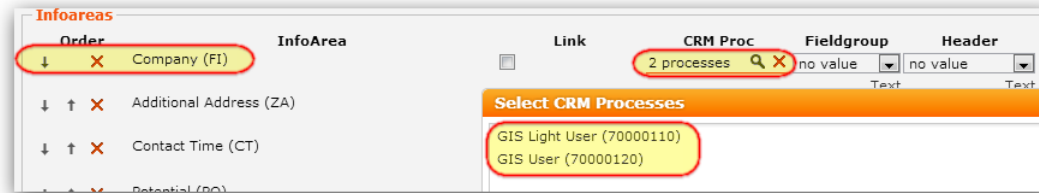
**Note:** With the template we’re also delivering a configuration for the CRM.pad (“TE\_ISI\_TABLET” configuration).

---

# 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

Category: Geo-coordinates  
 Option: Geolocation handler  
 ID: FInew  
 Type: Value (text)  
 Active:   
 Numeric:   
 Do not use entry:   
 Default Value:   
 Description: Enter the settings for the geolocation match-up plug-in here (class name, assembly name, parameters, ...). A list of available parameters can be found in the Administrator Guide.  
 Value: update.PlugIns.Geocoding.Bing.PlugIn,update.PlugIns.Geocoding.Bing;table=FI;latitude=184;longitude=185;type=new

2. Handler for updating existing records

Category: Geo-coordinates  
 Option: Geolocation handler  
 ID: FIupd  
 Type: Value (text)  
 Active:   
 Numeric:   
 Do not use entry:   
 Default Value:   
 Description: Enter the settings for the geolocation match-up plug-in here (class name, assembly name, parameters, ...). A list of available parameters can be found in the Administrator Guide.  
 Value: update.PlugIns.Geocoding.Bing.PlugIn,update.PlugIns.Geocoding.Bing;table=FI;latitude=184;longitude=185;upfields=5,7,8,10;type=update

3. Query format

Category: Geo-coordinates  
 Option: Query format  
 ID:   
 Type: Value (text)  
 Active:   
 Numeric:   
 Do not use entry:   
 Default Value:   
 Description: You can define the format of the geo-coordinate query per info area here. Use the names of the address fields as placeholders: {PostalTown}, {PostalCode}, {Locality}, ...  
 Value: {Street},{ZipCode},{City},{City}

#### 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:

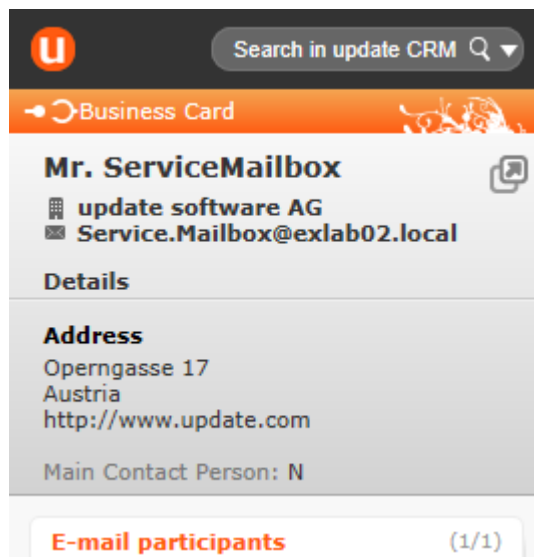
- 1.styles\te.base\update.css
- 2. styles\te.base\custom-color\_Example.css
- 3.styles\te.isi\update.css

To make modifications or additions to the styles please rename the custom-color\_ex-ample.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), Completion Date (43), Total Product Value (145)

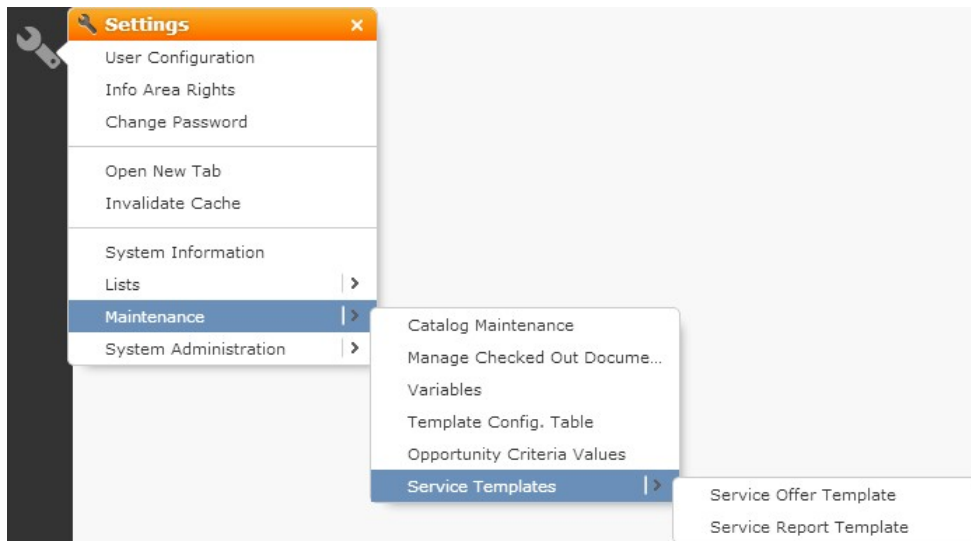
Additionally, the following info areas can be searched through the search in the top-right corner of the add-in: KM, OJ, Y1.

## 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

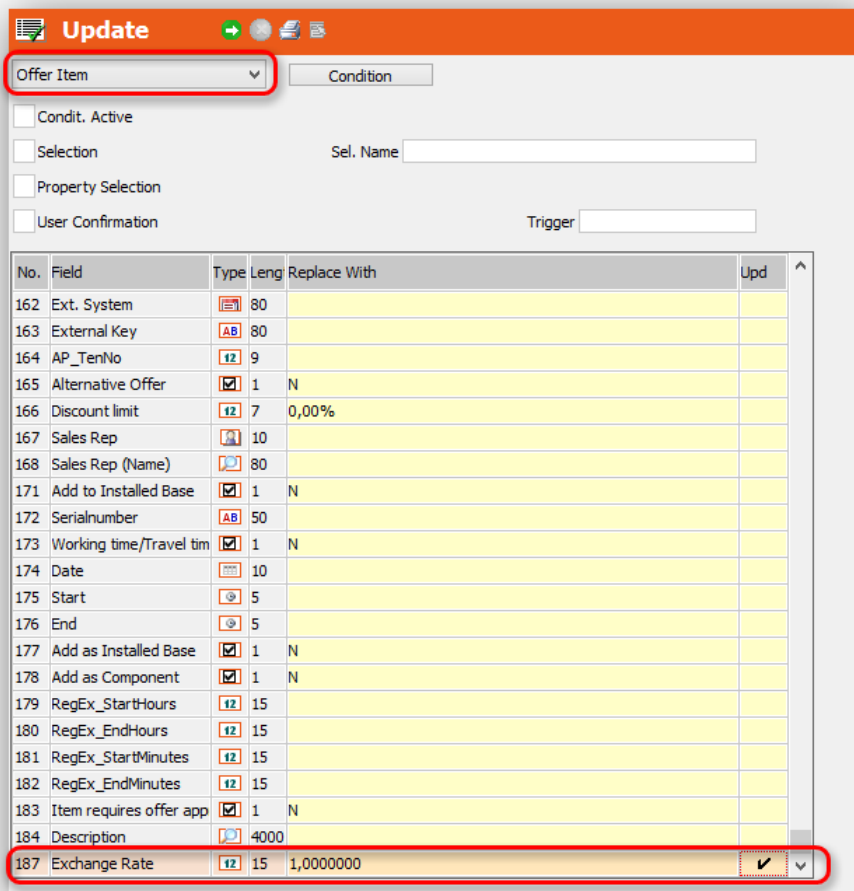
Learn about the Version 4 special currency fields for reports and analysis.

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.

The screenshot displays two windows from a software application. The top window, titled 'Variable: up...', shows the configuration for a variable named 'update\_CorporateCurrency'. The 'Name' field is highlighted with a red rectangle. Below it, the 'Info Area' is set to 'Exchange Rate' and the 'Field Name' is 'Currency'. The bottom window, titled 'Variable Value', shows a list of variables with their values. The 'Var. Text' field is set to 'EUR'.

Variable Name	Value
Z6_TenNo	
Stat. No.	
Rep Group ID	
Rep ID	
Language No.	
Login role	
Country	
Condition for info area	
Default	<input type="checkbox"/>
Var. Text	EUR
Var. Number/Catalog	2
Var. Rep ID	
Var. Date	
Var. Time (s)	
Var. Decimal	
Var. Logical	<input type="checkbox"/>
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 adaptations (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:

✗	TE_ID_NET_CHANGE SIGNATURE	Change Signature	TE_ISI	all	🔍
✗	TE_ID_NET_CHANGE WORKING HOURS	Change Working Hours	TE_ISI	all	🔍

For both actions we're calling the same process:

**Menu 'TE\_ID\_NET\_CHANGEWORKINGHOURS'**

Save ✓ Delete ✗

Text	Change Working Hours	
Configuration	TE_ISI	
CRM Processes	all	
Info Area		
QuickLink Context		
Image	<No Image>	
	<input checked="" type="checkbox"/> Visible	
Action	Process	
Description	Enter description here.	

**Referenced by**

- Menus [TE\\_ID\\_NET\\_SETTINGS](#)
- Expand no reference
- SearchAndList no reference
- TreeView no reference
- Button no reference

**Recent Changes**

**Action for Menu TE\_ID\_NET\_CHANGEWORKINGHOURS**

Action Template: Process

Executes a process.

Pass arguments as an object ?

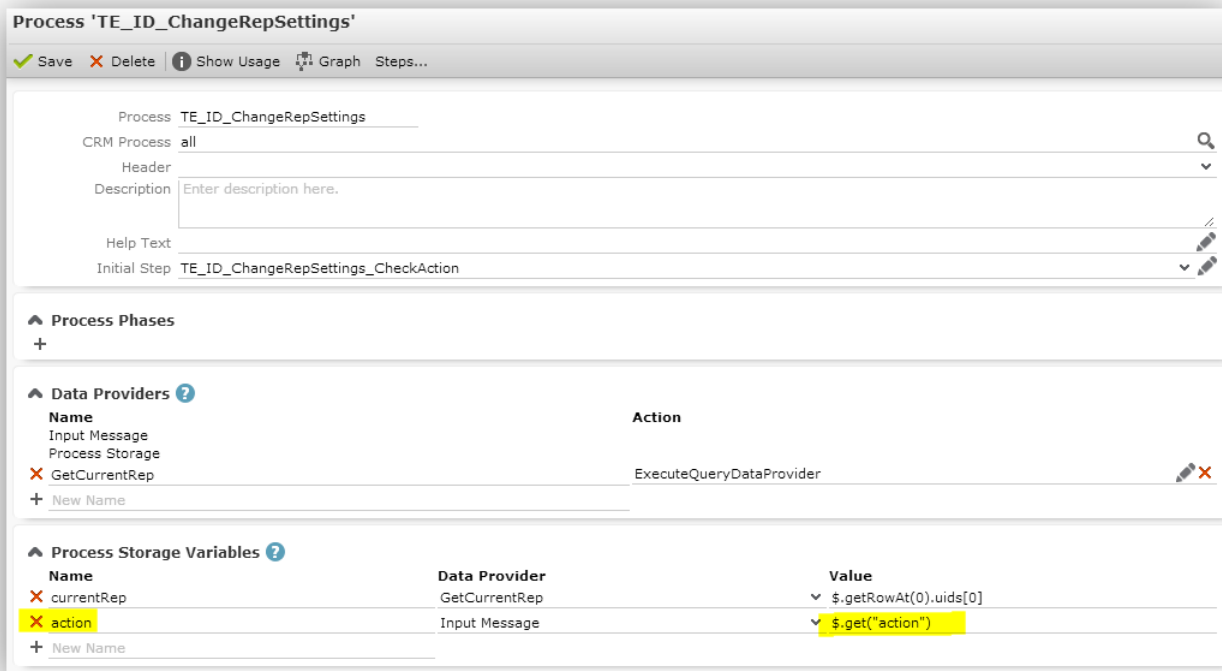
**Input Arguments**

- ! name: TE\_ID\_ChangeRepSettings
- ! processState: RequireEnabled
- createNewPopup: { "width": 0.5, "height": 0.4 }
- ✗ action: working\_hours
- ✗ onProceed: \$back
- + New Argumentname

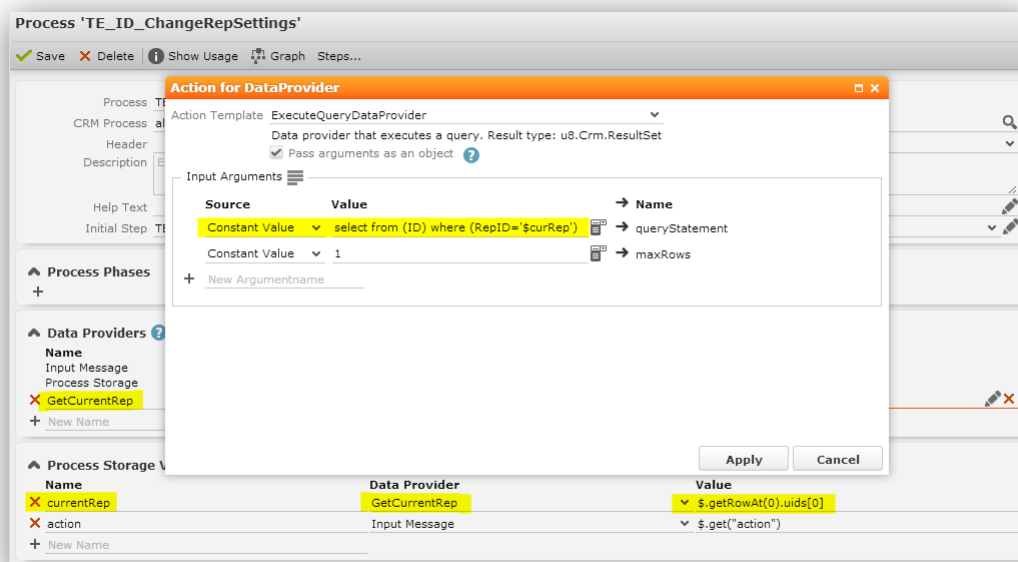
**Output Arguments**

- + New Argumentname

The difference between the processes is the value of the parameter “action”



We defined an own data provider to get the current rep:

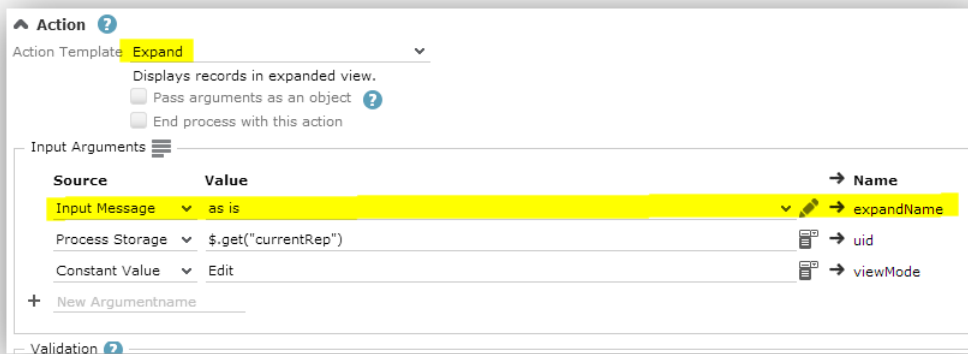




At the initial step we're checking the value of the "action" parameter. Afterwards we're dispatching to the same step, but with different input arguments:



The last step is displaying a specific expand:



Used expands:

TE\_ID\_DefineSignature

TE\_ID\_DefineWorkingHours

## Deactivated Template Processes

List of deactivated template processes.

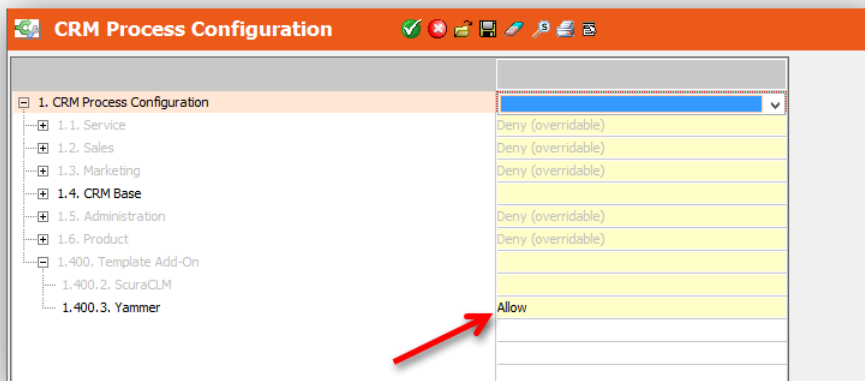
We are delivering a lot of CRM processes with the template. The following processes are deactivated by default:

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

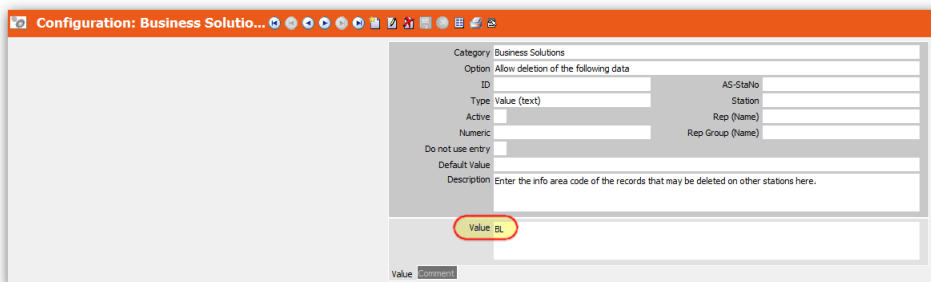
Every process can be activated in our own global process configuration or in the process configurations of our roles (eg. Sales).

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	Direction	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

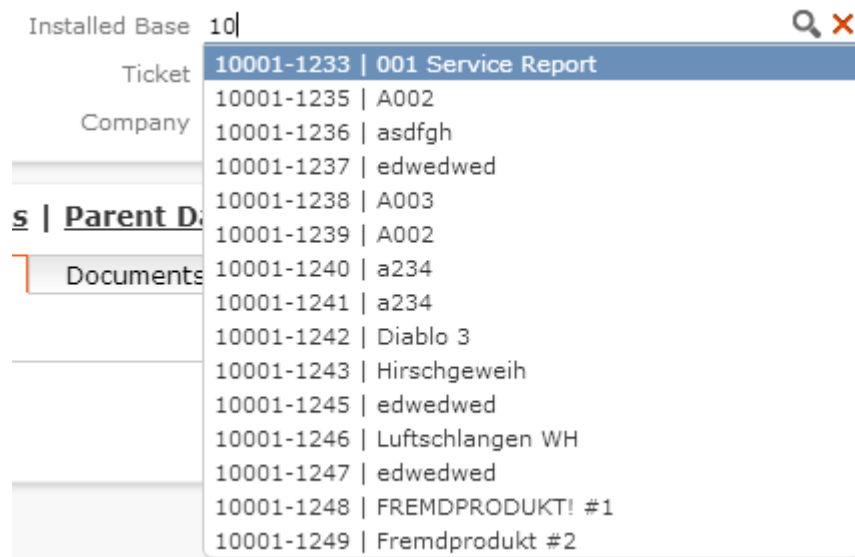
\<Interface Installation directory>\xml\SyncML\_gw2mm.xslt

\<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](http://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

Call: `u8.TeISI.CallbackFunctions.displayMessage("textGroupName",messageTextNo,commentTextNo)`

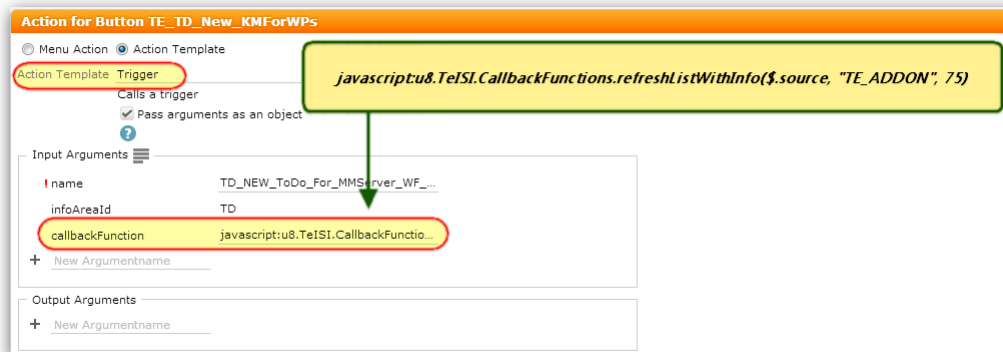
## refreshListWithInfo

Parameter: source, textGroupName, messageTextNo, commentTextNo

Call: `u8.TeISI.CallbackFunctions.refreshListWithInfo($.source, "textGroupName",messageTextNo,commentTextNo)`

Info: Grey parameters are optional!

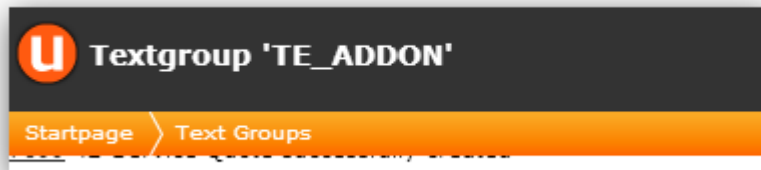
Example:



After executing the trigger, the list will be refreshed and the text will be displayed.  
Text which is displayed:

textgroup "TE\_ADDON"

textNo 75



7508 74 Original Pricing - Offer value will be calculated using the price lists  
 7912 75 To-Do successfully created!

## Light User

Learn about the light user for the ISI Business solution template.

Name	TE_Light_User
Login role	Light User
Rights Format	TE_RR LightUser
Desktop Format	
Priority	9000
	Inactive <input type="checkbox"/>
	Read only <input type="checkbox"/>

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.

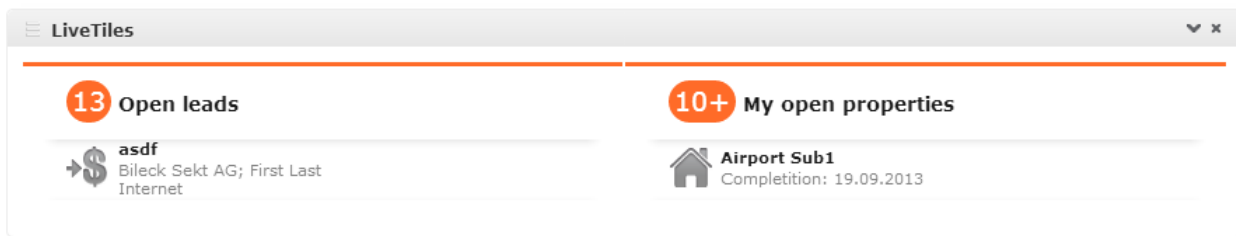
---



## 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.

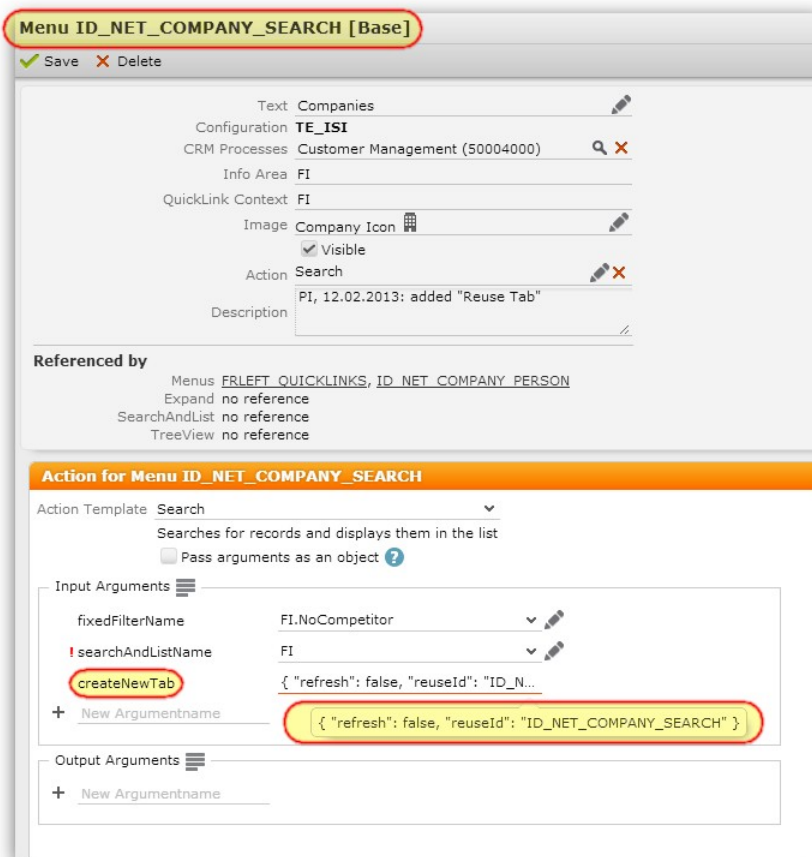
### Non-Target

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.

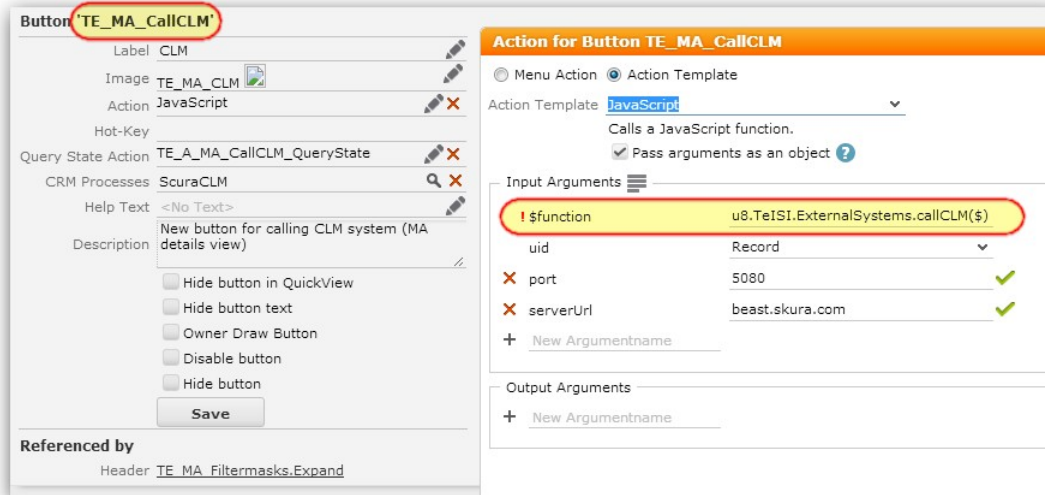
If a tab with the same ID is still open, the tab will be reused, but not refreshed. The ID of the tab is always the name of the menu action. The following syntax has been added:



## Scura CLM

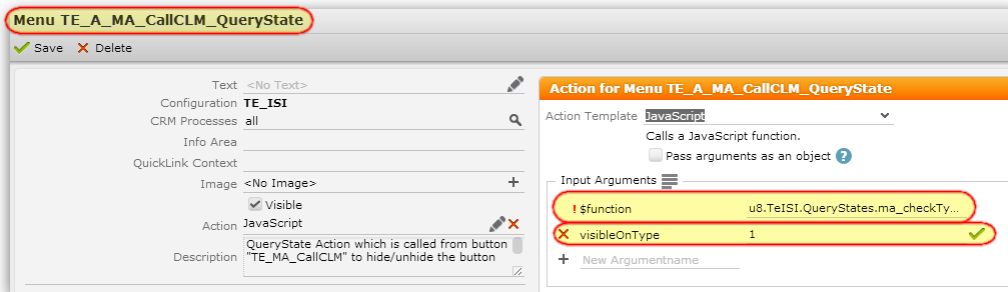
Learn about the Scura CLM for ISI business solution template.

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 "visibleOnType" 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

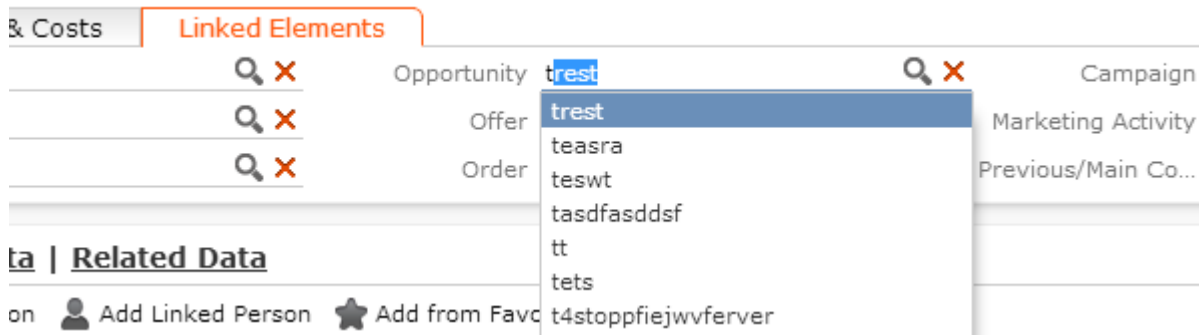
Learn about the user experience goodies.

### 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.

```

1 selectRecord({
2 from:
3 {
4 infoAreaId: "Y1",
5 useAutoSearch: true
6 },
7 findAsYouType:
8 {
9 searchFields:[6],
10 textFields:[6]
11 }
12 });

```

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.

Telefon +49 () | 

Fax +49 () |

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 f	Ortsvorwahl der	Person (KP)	Telefon		✓
1	Telefon	Firma (FI)		Landesvorwahl f	Ortsvorwahl der	Person (KP)	Telefon 2		✓
2	Fax	Firma (FI)		Landesvorwahl f	Ortsvorwahl der	Person (KP)	Fax		
3	Telefon	Person (KP)	Länderschlüssel	Ortsvorwahl	Person (KP)	Person (KP)	Tel.privat		✓
4	Fax	Person (KP)	Länderschlüssel	Ortsvorwahl	Person (KP)	Person (KP)	Fax privat		
5	Mobiltelefon	Firma (FI)		Landesvorwahl f		Person (KP)	Mobil		✓
6	Telefon	Firma (FI)		Landesvorwahl f	Ortsvorwahl der	Firma (FI)	Telefon -x-Tel.Ext		✓
7	Fax	Firma (FI)		Landesvorwahl f	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)	Person (KP)	Tel.privat		✓
4	Fax	Person (KP)	Länderschlüssel	Ortsvorwahl	Person (KP)	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

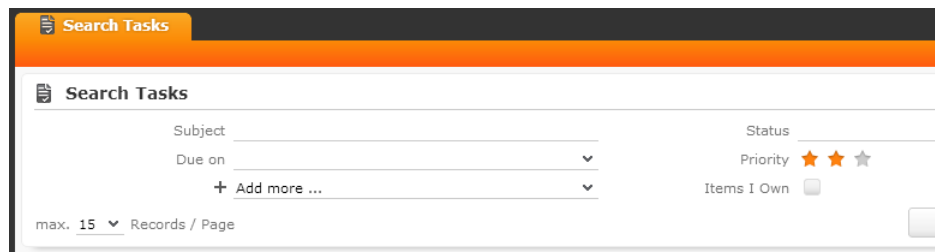
Substituted with these field IDs from the product:

16	16	Telefon	text(40)		Tel	✓	40
17	17	Fax	text(40)		Fax	✓	40

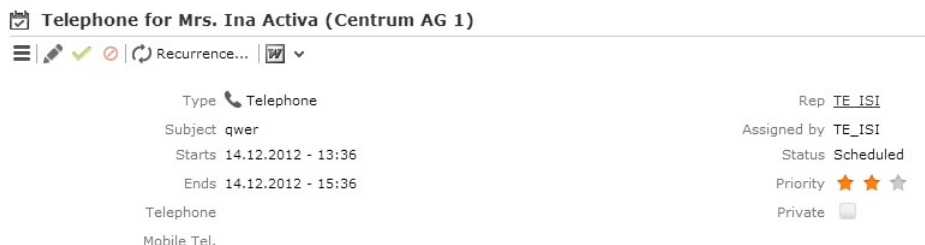
**Rating Input**

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 InfoAreald related to the used priority catalog) was used on every rating control:

```
{
type: "CatalogRatingInput", options:
{
infoAreald: "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.

TE_Social_ObservedFields_KM Comma separated list of FieldIDs of the infoarea KM	<empty>
TE_Social_ObservedFields_MA Comma separated list of FieldIDs of the infoarea MA	<empty>

Until now, the fields were hardcoded in the script “isisocial.js”

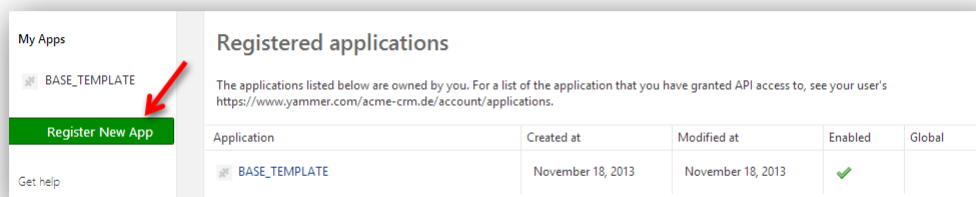
Example: The value of the parameter “TE\_Social\_ObservedFields\_MA” may look like this: 5044,23

## Yammer

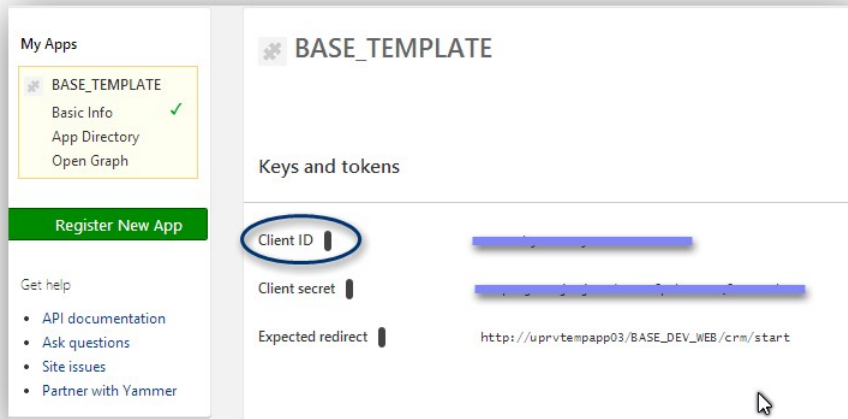
Learn about using yammer in business solution template.

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](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.

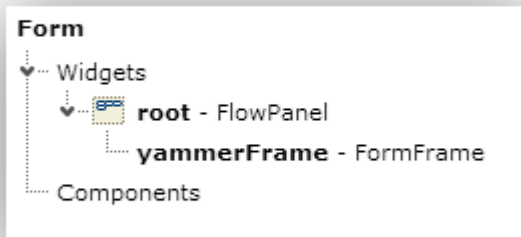


### Aurea CRM designer

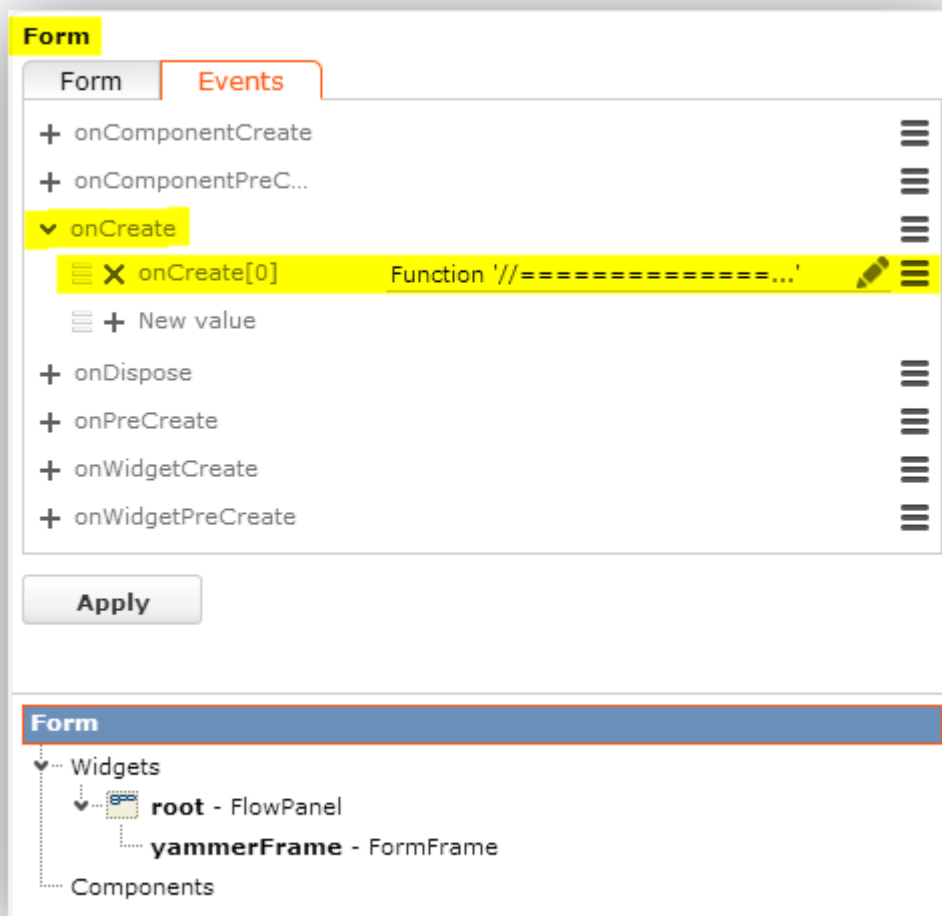
As part of the ISI Template we deliver an example form in the TE\_CORE configuration.

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

```

Event Editor
○ Execute an action
● Execute a javascript function

1 //=====
2 var baseUrl = "http://uprvtempapp03/BASE_DEV_WEB";
3 var htmlUrl = "http://uprvtempapp03/BASE_DEV_WEB/te.base/Yammer.html?";
4 var imageUrl = "http://www.update.com/var/em_plain_site/storage/images/media/imag
5 var network = " ";
6 var objectType = "company";
7 var backLink = baseUrl + "/crm/view?uid=";
8 var postTextTextgroup = "TE_CORE";
9 var postTextNr = "54";
10 //=====
11

```

Parameter Name	Description	Example
baseUrl	URL of your web installation	<a href="http://uprvtempapp03/BASE_DEV_WEB/te.base/Yammer.html?">http://uprvtempapp03/BASE_DEV_WEB/te.base/Yammer.html?</a>
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_button/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:

```

17 // get company fields
18 u8.services.crud.read({ uid: uid, fields: ["Company", "Synonym"] }, function
19

```

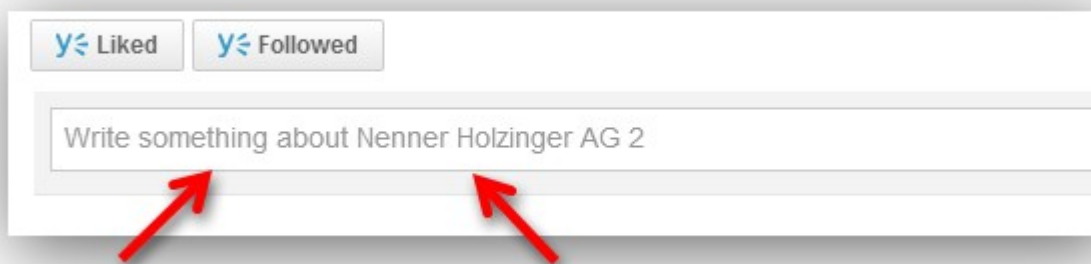
Modify the "title" and "description" strings so that they fit your customer's needs:

```

22 // get the Yammer title from the business object
23 var title = crudArgs.businessObject.get("Company");
24 var description = crudArgs.businessObject.get("Synonym");
25

```

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\_Example.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:

```
1 <html>
2 <head>
3 <title>Yammer</title>
4
5 <!-- Enter your project specific yammer ID here -->
6 <script data-app-id="XXXXXXXXXXXXXXXXXXXX" src="https://assets.yammer.com/platform/yam.j
7
8 <script src="http://code.jquery.com/jquery-1.10.1.min.js"></script>
9 <style type="text/css">
10 .feed { width:95%; height:95%; margin:5px; margin-top: 7px; float:left;}
```

To display the form in your web application just add the form as a related data tab:

Header 'ExpandChildren', Header Group 'FI'

Save

Text **Related Data: {SUBINFOS} of {RECORD}**

Image

Show buttons with text    Show buttons in extra line    Use plain style (no borders)

Related View Layout  Tabs    One column    Two columns

Description

**Buttons**

**Infoareas**

Order	InfoArea	Link	CRM Proc	Fieldgroup	He
↓	Company (FI)	<input type="checkbox"/>	Yammer	no value	no value



**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:

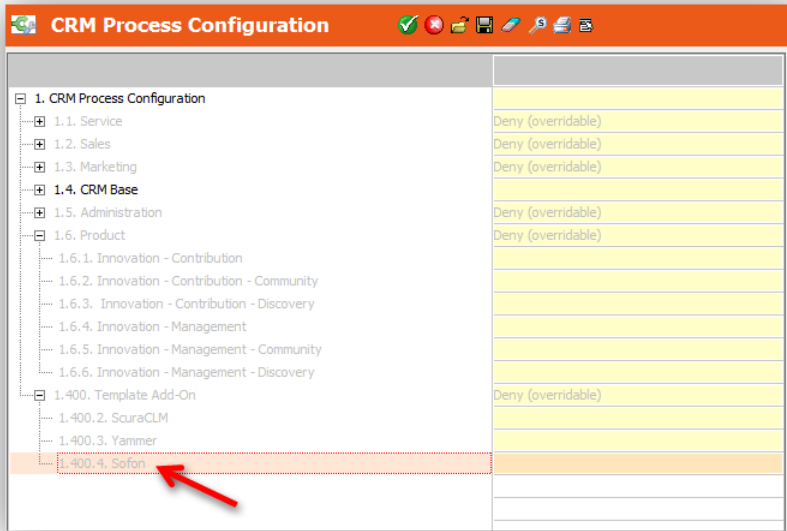
Infoarea PR: field 5048 here the sofon id is stored

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, because 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.

R4-StaNo	R4-SerNo	Parent CRM Proci No.	CRM Process	CRM Process ID	win	web	Overridable	Lock	Lock
10001	67	1.1.1.1.20.	Social Ticket Management				✓		
10001	68	1.6.	Social Product				✓		
10001	69	1.4.	400 Corporate Currency		✓	✓	✓		
10001	70	1.1.1.	402 Emergency e-mail		✓	✓	✓		
10001	27	1.4.7.	400 QV-Analyses	1.4.7-400-QV-Analysen	✓	✓	✓		
10001	20	1.	400 Template Add-On				✓		
10001	73	1.4.1.3.11.	Person (PE)		✓	✓	✓		
10001	74	1.4.1.	401 Trinity - roles				✓		
10001	75	1.4.1.	402 Trinity - private person				✓		
10001	18	1.4.1.	400 Sticky Note				✓		
10001	77	1.400.	4 Sofon		✓	✓	✓		
10001	78	1.4.7.2.11.	Export All Excel				✓		

## 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

**TE\_Sofon\_ItemNo**  
 Web Config Parameter to define which item master record should be used for sofon items.  
 xx\_sofon\_xx  
 Configuration: TE\_ISI

Please make sure that the item master records exists in your crm

The screenshot shows the configuration page for 'xx\_sofon\_xx'. It includes a header with the title 'xx\_sofon\_xx' and an 'Adjust Layout & Fields' button. Below the header, there are several fields: 'Item name' (xx\_sofon\_xx), 'Item No.' (xx\_sofon\_xx), 'Product Group', 'Product', 'Packaging Unit', 'Quantity Unit', and 'Packaging Unit Description'. There are two tabs: 'Settings' and 'Image'. Under the 'Settings' tab, there are three settings: 'Discount limit' (0,00%), 'No effect on stock' (checkbox), and 'is hierarchy level' (checkbox). On the right side, there are two checkboxes: 'Add as Component' and 'Add as Installed Base'.

The second parameter defines the default values of the offer item record

**TE\_Sofon\_SofonItemDefaultValues**  
 Web Config Parameter to define the default values for the sofon offer item. Comma separated list of fieldIDs and values.  
 10:1,151:true,152:true,153:true  
 Configuration: TE\_ISI

The parameter contains a comma separated list of fieldIDs and values <field-ID>:<fieldValue>,...

The third parameter defines the url to your sofon installation

**TE\_Sofon\_URL**  
 Web Config Parameter to define the URL of the sofon installation.  
 http://localhost/UpdateWpoInterface/StartSofon.aspx?id=  
 Configuration: TE\_ISI

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".

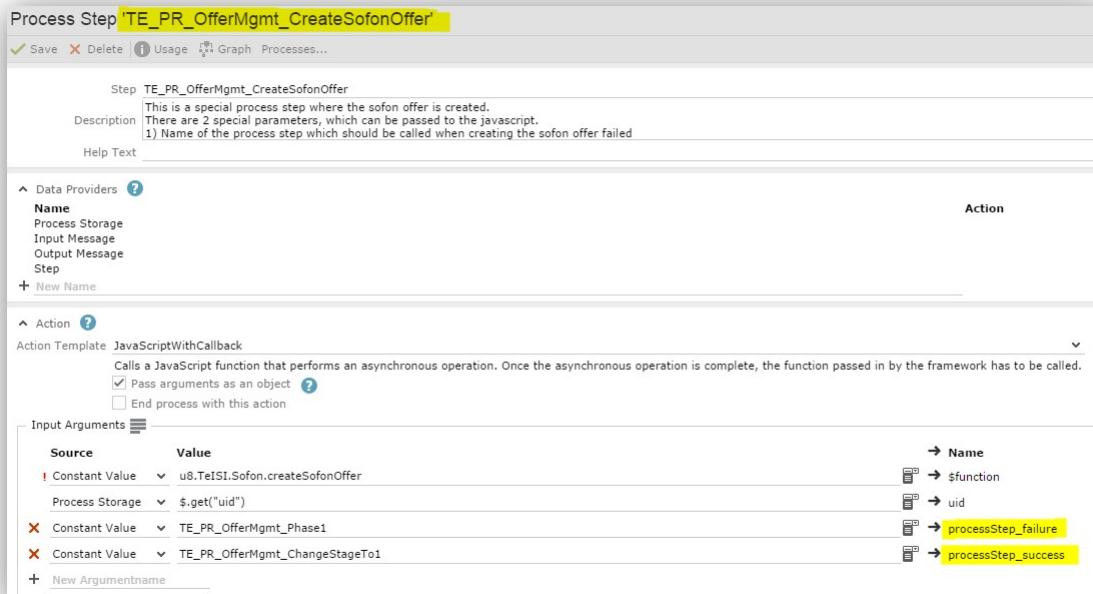
### Queries

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 handled in the offer process to create a new offer in sofon

The screenshot shows the configuration interface for a button named 'TE\_PR\_Sofon\_CreateOfferInSofon'. The interface is divided into two main sections: a left-hand configuration panel and a right-hand action configuration panel.

**Left Panel (Button Configuration):**

- Label:** Create Offer in Sofon
- Image:** II
- Action:** Command
- Hot-Key:** (empty)
- Query State Action:** <No Action>
- CRM Processes:** Sofon
- Help Text:** Enter description here.
- Description:** Enter description here.
- Options:**
  - Hide button in QuickView
  - Hide button text
  - Owner Draw Button
  - Disable button
  - Hide button

**Right Panel (Action Configuration):**

**Action for Button TE\_PR\_Sofon\_CreateOfferInSofon**

- Menu Action:** (unselected)
- Action Template:** Command (selected)
- Executes a command:** (checked)
- Pass arguments as an object:** (unchecked)
- Input Arguments:**
  - Command: Proceed/CreateOfferInSofon
  - Record: Record
  - + New Argumentname
- Output Arguments:**
  - + New Argumentname

Process Step 'TE\_PR\_OfferMgmt\_Phase1'

Step: TE\_PR\_OfferMgmt\_Phase1  
 Description: Display the existing offer record in phase 1.  
 History:  
 Help Text:

Data Providers

Name	Action
Process Storage	
Input Message	
Output Message	
Step	

Action

Action Template: Expand  
 Displays records in expanded view.  
 Pass arguments as an object  
 End process with this action

Input Arguments

Source	Value	Name
Constant Value	TE_PR_Phase1_WithoutChildren	expandName
Input Message	u8.isValidRecordUid(process.get("uid")) ? process.get("uid") : \$.get("uid")	uid
Input Message	as is	link
Constant Value	off	proceed

Validation

Source	Condition	Error Text
+ New Condition		

Output Arguments

Value	Target	Name
+ New Argumentname		

Dispatching

Source	Condition	Next Step	Arguments
Step	\$.get('command') == "Proceed/OfferHeaderComplete"	TE_PR_OfferMgmt_ChangeStageTo1	uid = \$.get("uid")
Step	\$.get('command') == "Proceed/CreateOfferInSofon"	TE_PR_OfferMgmt_CreateSofonOffer	

TE\_PR\_Sofon\_OpenSofonOffer

This button opens the sofon form in a new tab

Button 'TE\_PR\_Sofon\_OpenSofonOffer'

Label: Open Sofon  
 Image: II  
 Action: ShowForm  
 Hot-Key:  
 Query State Action: TE\_A\_PR\_Sofon\_OpenSofon\_QueryState  
 CRM Processes: Sofon  
 Help Text:  
 Description: Enter description here.  
 Hide button in QuickView  
 Hide button text  
 Owner Draw Button  
 Disable button  
 Hide button

Action for Button TE\_PR\_Sofon\_OpenSofonOffer

Menu Action  Action Template   
 Action Template: ShowForm  
 Shows a Form  
 Pass arguments as an object

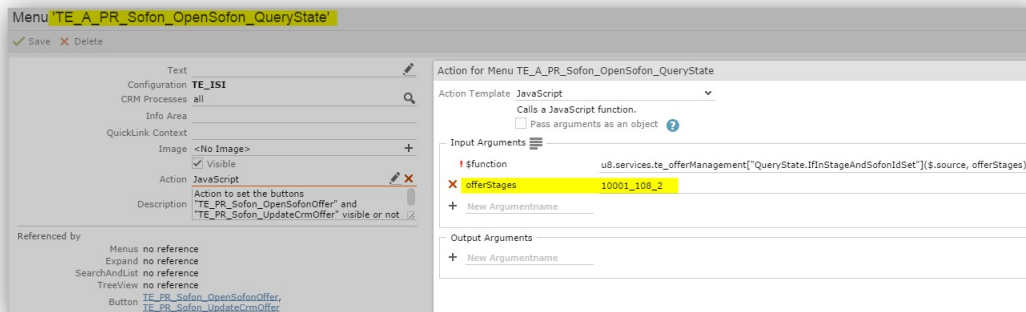
Input Arguments

CreateNewTab	true
! FormName	TE_PR_Sofon
InfoArea / RecID	Record

Output Arguments

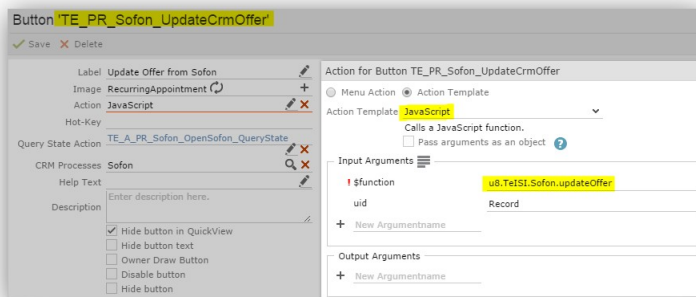
+ New Argumentname

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:



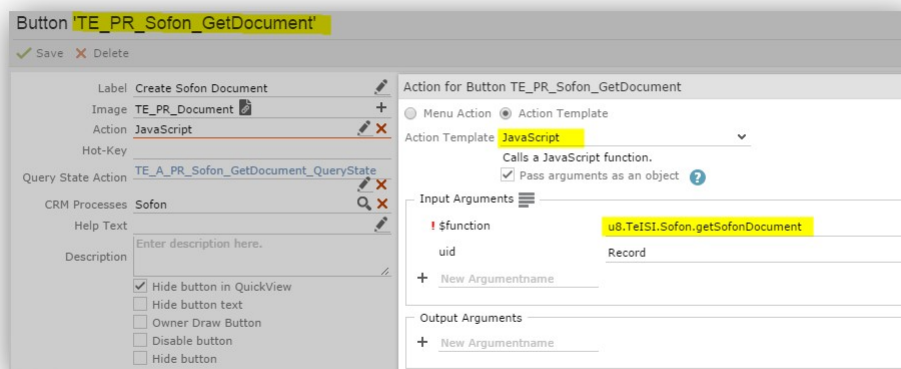
## TE\_PR\_Sofon\_UpdateCrmOffer

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"/>
```



```
<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.

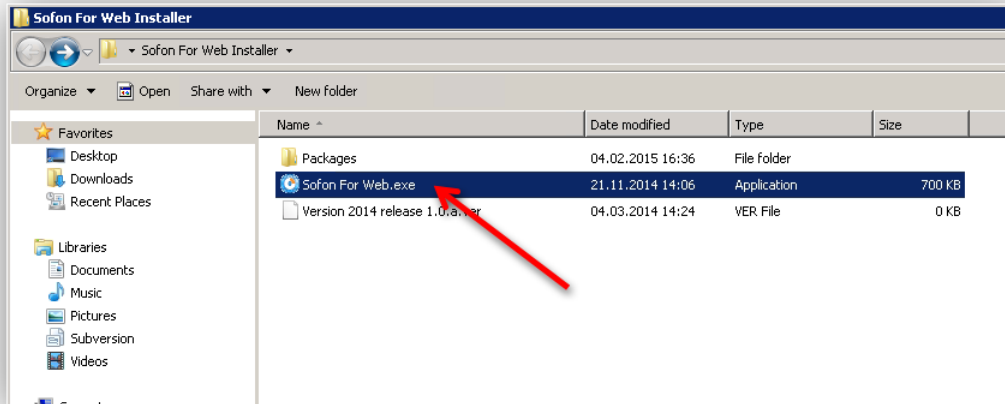
## Installation & Configuration

1. To install Sofon please run the Sofon Standard installer.

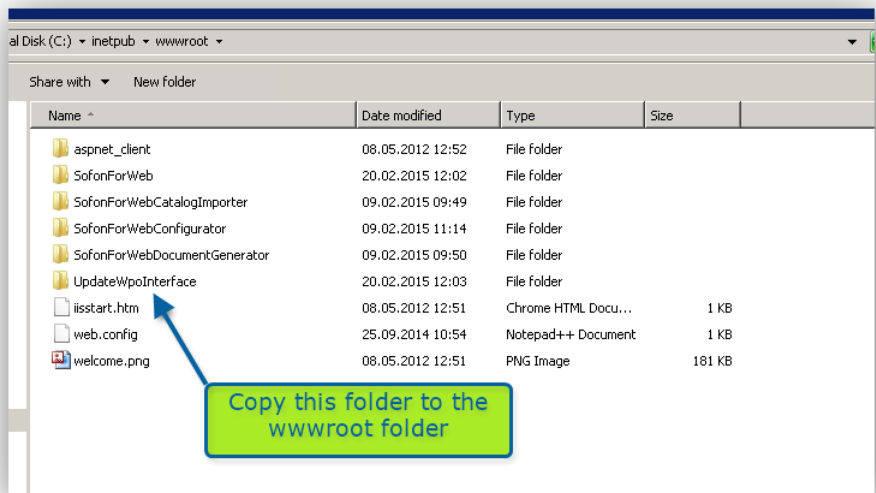
---

**Note:** Packages folder must contain msi files.

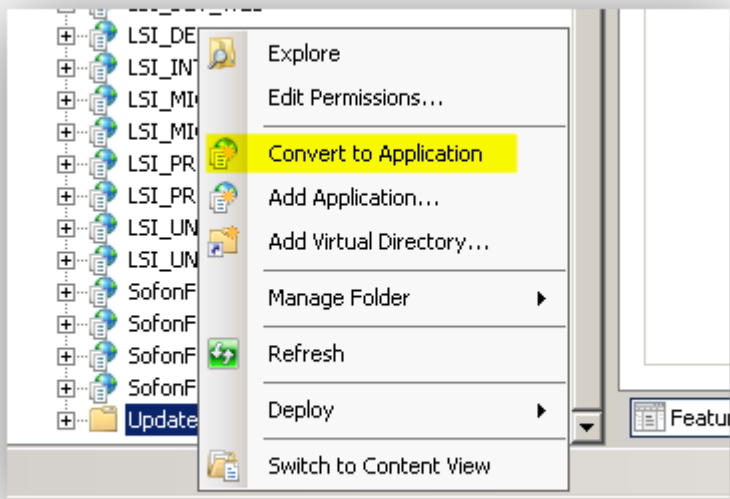
---



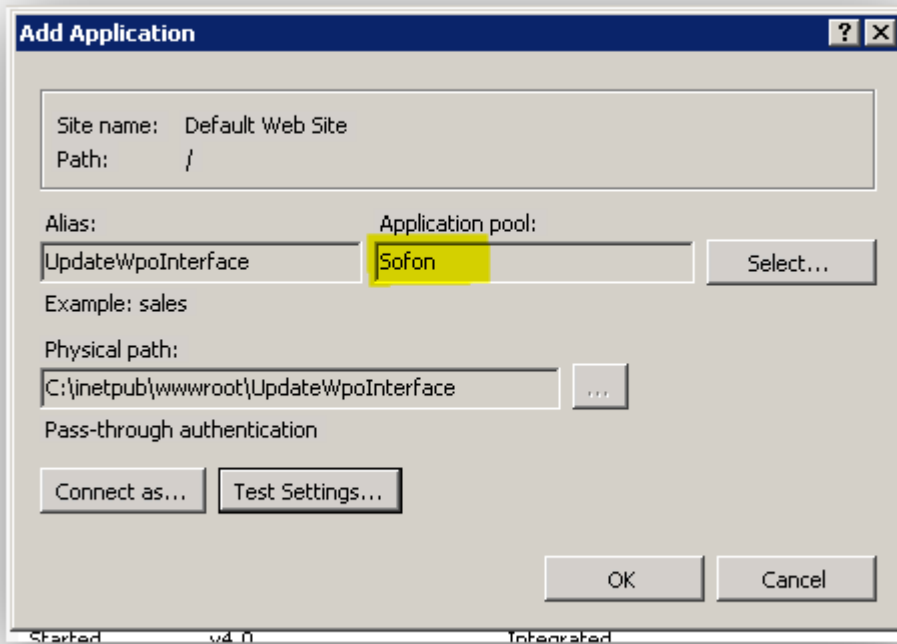
2. After installing Sofon you have to install the update specific interface.



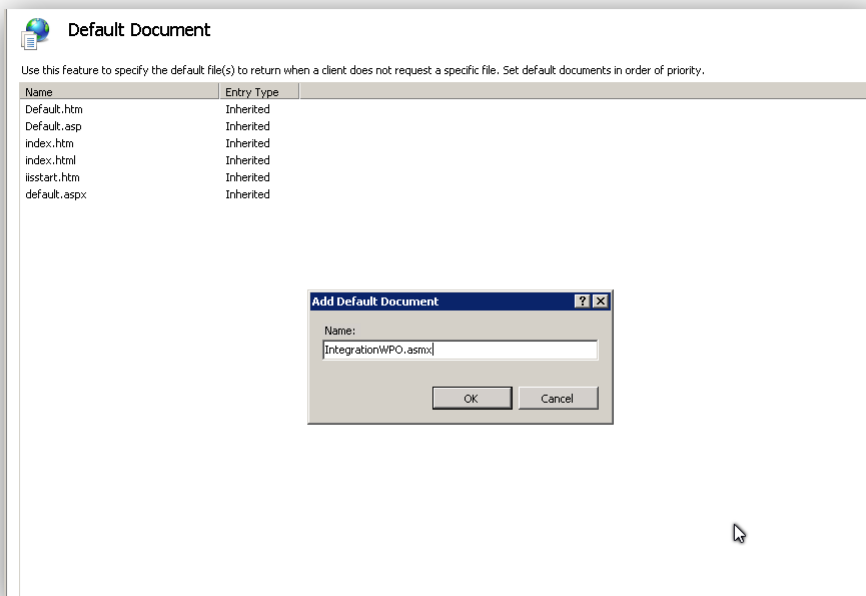
3. When opening the IIS Manager you can see the folder. Convert this folder to an application:



4. Choose the automatically created “Sofon” application pool:



## 5. Now, add the “IntegrationWPO.asmx” to the IIS Default Documents

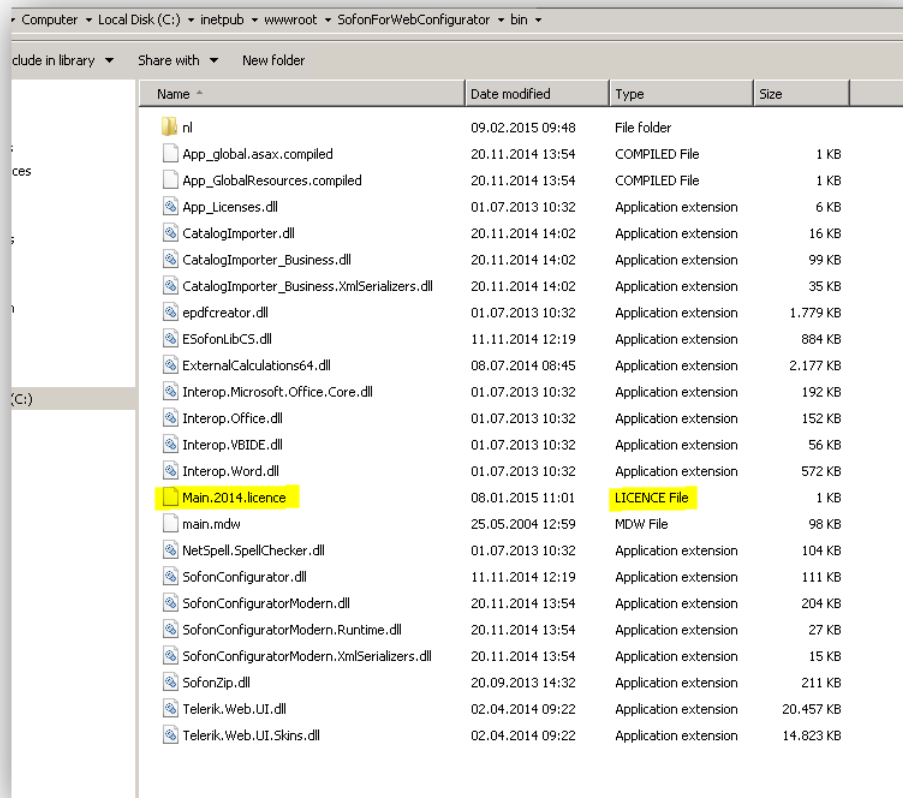


## 6. Now, open all of these \*.exe File to configure your Sofon installation:



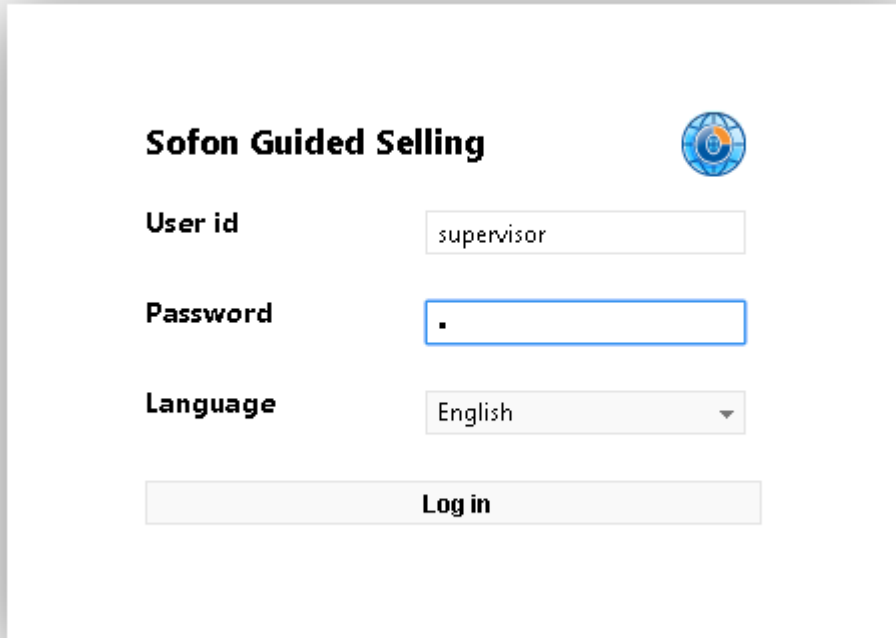
This URL should be set as „Integration Service URL:“ <http://servername/UpdateWpolInterface/IntegrationWPO.asmx>


7. After installing the complete Sofon package you should make sure that the product is licensed. Copy your 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”



**Sofon Guided Selling** 

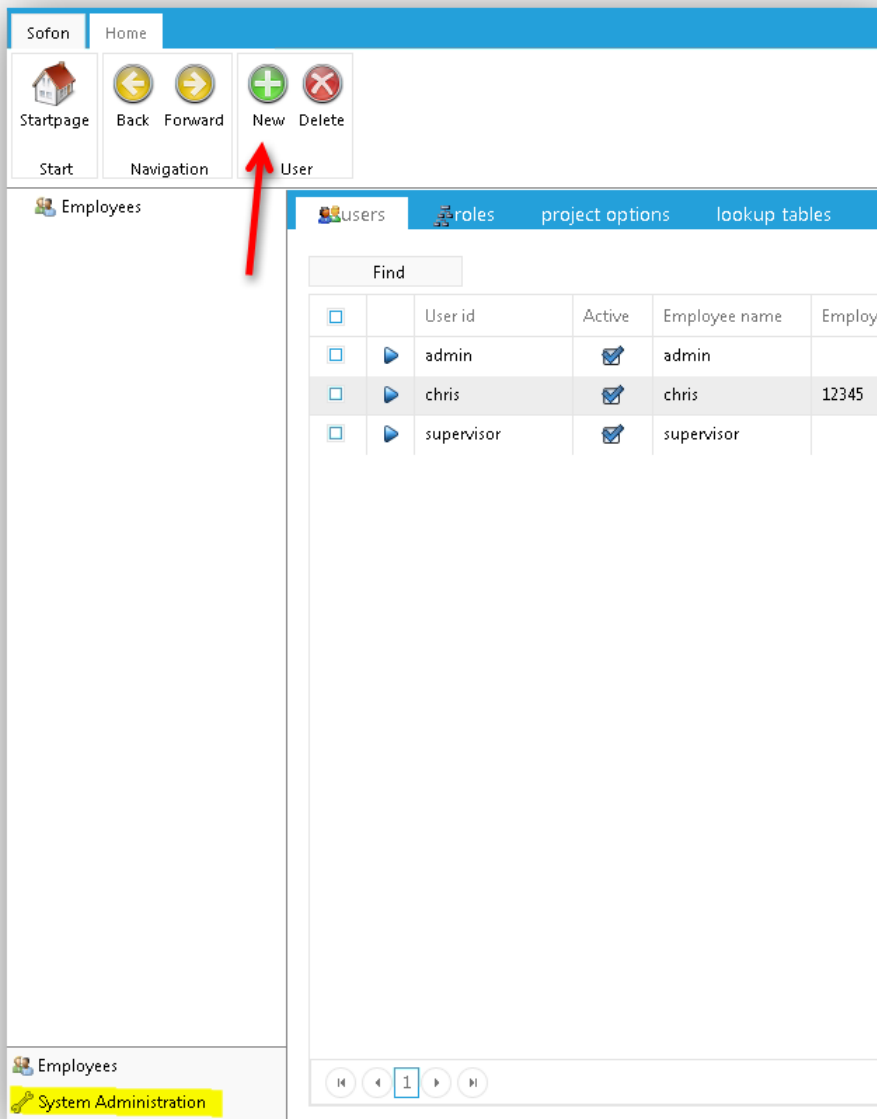
**User id**

**Password**

**Language**

**Log in**

9. Switch to “System Administration” and create a new employee as described below. In our case the user name is “chris”.



User

User id   Active

Password

Role

Role  ▼

Studio

Proposal Organizer

Sales Organizer

Authorizer

Employee

Employee code

Default employee type in project

Employee name

Department

Phone

Mobile phone

E-mail

Site

10. Create a new role called “default”

Sofon Home

Startpage Back Forward New Delete

Start Navigation Role

Employees

Users Roles project options lookup tables entity settings fields settings security

	Role id	Description
<input type="checkbox"/>	default	

11. Assign the role to the rep:

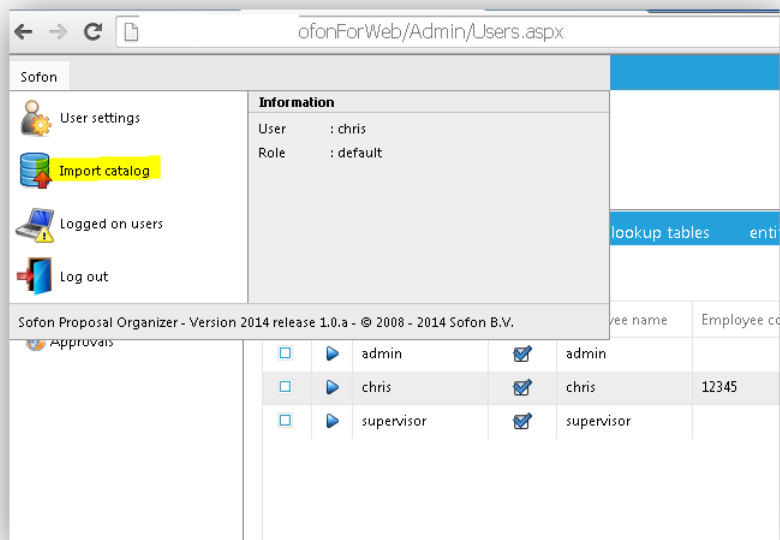
The screenshot shows a web form for user management, divided into three sections: User, Role, and Employee. The 'User' section contains a 'User id' field with the value 'chris' and an 'Active' checkbox that is checked. The 'Role' section features a dropdown menu currently set to 'default', with a list of other roles: 'Studio', 'Proposal Organizer', 'Sales Organizer', and 'Authorizer', each accompanied by a checked checkbox. The 'Employee' section includes several input fields: 'Employee code' (12345), 'Default employee type in project' (a dropdown menu), 'Employee name' (chris), 'Department', 'Phone', 'Mobile phone', 'E-mail', and 'Site'.

User	
User id	chris
Active	<input checked="" type="checkbox"/>
Password	

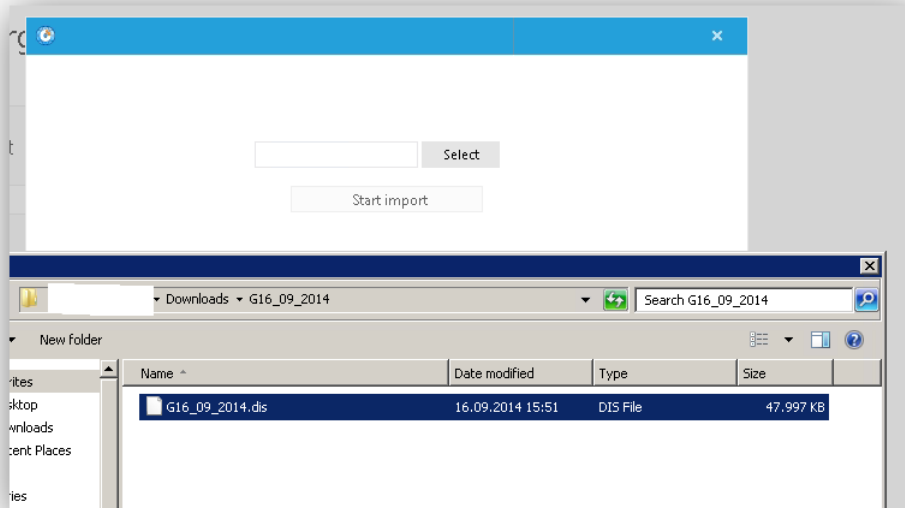
Role	
Role	default
Studio	<input checked="" type="checkbox"/>
Proposal Organizer	<input checked="" type="checkbox"/>
Sales Organizer	<input checked="" type="checkbox"/>
Authorizer	<input checked="" type="checkbox"/>

Employee	
Employee code	12345
Default employee type in project	
Employee name	chris
Department	
Phone	
Mobile phone	
E-mail	
Site	

## 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".