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## SAP CRM – (by Ravikiran)

### 1) My SAP CRM Solution Overview

- Overview of SAP ERP and SAP CRM
- Introduction - Getting to know mySAP CRM
- mySAP CRM – Features and Industry Solutions
- CRM architecture & Component integration
- System Landscape
- Easy Access & IMG - importance & necessity
- Key capabilities of mySAP CRM
- Channels of interaction

### 2) SAP CRM Web User Interface (WEB UI)

- Detailed overview on CRM Web UI
- UI Concept ,component workbench
- UI Configuration
- Business roles customizing ,PFCG Role config keys
- Navigation bar profile Customizing
- Configuration for work centers ,
- logical link groups, Direct link Groups
- Navigation Bar Customizing and Transaction Launcher,
- Easy Enhancement Workbench and Application Enhancement Tool
- Component Enhancement Concept
- Personalization & Skins

### 3) Base Customization/Master Data (SAP CRM & SAP ECC)

#### CRM Business Partner (BP)

- Creation of BP on Category
- Basic setting on Field grouping & No ranges
- BP Relationships, BP Roles

- Mapping BP Classification & Account Group from ECC to CRM

### **Organizational Management**

- Fundamentals of SAP CRM Org Structure
- Organizational Data determination
- Mapping Org Model & Enterprise Structure from ECC to CRM

### **Territory Management**

- Hierarchy Levels, Hierarchy ID
- Assign employee to Hierarchy

### **Product Master**

- CRM Product Types
- Creation of Hierarchies & Categories
- Creation of Attributes & Set Types
- Mapping Product Master & Material Master from ECC to CRM

### **Transaction Processing**

- Transaction Processing for Enquiry, Quotation & Order
- Customization of Transaction Types
- Assignment of Item Category Determination
- Mapping Transaction Types & Sales doc Processing from ECC to CRM

### **Activity Management**

- Business Activity / Task
- Activity Monitor

### **Partner Processing**

- Partner determination Procedure

### **Action Profile**

### **Pricing Fundamental (SAP CRM)**

- Configuration setting for Pricing Procedure
- Pricing fundamentals (ECC)
- Condition technique and pricing procedure determination (ECC)

### **CRM Billing**

- CRM Billing Fundamental (ECC)

## **4) CRM Marketing**

- Overview of Marketing
- Marketing planning, Marketing calendar
- Marketing Analytics
- Graphical Modeler
- Creating profiles and target groups
- Campaign management
- Campaign Automation
- Segmentation of business partners
- Segment builder tool
- Product Proposals

- Lead Management
- Personalized mail forms
- External list management
- Trade Promotion Management

## **5) CRM Sales**

- The Sales cycle
- Opportunity Management
- Copying control
- Quotation Management
- Order Management
- Special Functions in Quotation and Order Management
- Credit Management
- Visit Planning
- Task & Activity Management
- Contract Management, Status Management
- Transactions processing, Partner processing
- Mapping Sales Transactions between SAP ECC and SAP CRM

## **6) CRM Service**

- Service Request, Service Ordering & Contract Mgmt
- Complaint Management
- Case Management
- Installed base Management
- Overview of CRM Service
- Installed Base Management and Individual Objects
- Service Agreements and Service Contracts
- Service Plans
- Service Order Management
- Product Service Letters
- Complaints and Returns Management
- Workflow and Escalation Management
- Warranty Claim Services
- Case Management

## **7) CRM Middleware**

- CRM Middleware Overview
- Concepts of Middleware
- Administration Console
- Basic Replication Administration

- Adapter Objects
- Initial Load, Delta Load
- BDocs and types of Bdocs, BDoc Modeler
- Data exchange between ECC and CRM
- Monitoring and Error handling

## **8) CRM Customer Interaction center (CIC)**

- Interaction center overview
- Framework and components
- CIC Profile and Configuration
- Agent functions and processes in the IC
- Component Configuration
- Action Box Configuration, CTI Configuration
- Visible component configuration
- IC Agent and IC Manager Profile
- IC Management functions: (Call List, Scripting)
- IC Manager Portal, IC Manager Dashboard
- Call List Management
- Interactive Scripting
- IC Workforce Management

## **9) E-Commerce (Web Channel)**

- Overview of E-Commerce & ICSS
- B2B and B2C scenarios
- Configuration Web Application
- Different Types of Selling Cross selling ,Up selling, Down selling
- Creating Product catalogs
- Publication of Product Catalog content
- Create Internet User for order processing
- Sales Transactions using "Internet Sales"
- Web Shop Maintenance

## **10) Overview of Mobile Applications – Mobile Application Studio**