



SAP Best Practices

Opportunity Management (C63)

Business Process Documentation

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English

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Icons

Icon	Meaning
	Caution
	Example
	Note
	Recommendation
	Syntax

Typographic Conventions

Type Style	Description
<i>Example text</i>	Words or characters that appear on the screen. These include field names, screen titles, pushbuttons as well as menu names, paths and options. Cross-references to other documentation.
Example text	Emphasized words or phrases in body text, titles of graphics and tables.
EXAMPLE TEXT	Names of elements in the system. These include report names, program names, transaction codes, table names, and individual key words of a programming language, when surrounded by body text, for example, SELECT and INCLUDE.
Example text	Screen output. This includes file and directory names and their paths, messages, source code, names of variables and parameters as well as names of installation, upgrade and database tools.
EXAMPLE TEXT	Keys on the keyboard, for example, function keys (such as F2) or the ENTER key.
Example text	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
<Example text>	Variable user entry. Pointed brackets indicate that you replace these words and characters with appropriate entries.

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Opportunity Management

1 PURPOSE

In this scenario, all activities involved in creating an opportunity within the sales process are described. The opportunity acts as “umbrella” for all information that is related to a long sales project. The main target groups for this scenario are sales clerks, sales assistants, sales representatives, and sales managers.

2 PREREQUISITES

2.1 Master Data and Organizational Data

Essential master and organizational data were both created in and/or replicated to your CRM system during the implementation phase, such as the data that reflects the organizational structure of your company and master data that suits its operational focus, for example, master data for materials and customers.

Use your own master data (or the following Baseline Package scenario data listed below if you have installed an SAP Best Practices Baseline Package) to go through the business process procedure:

Master / org. data	Value	Master / org. data details	Comments
<PROSPECT>	100000		
<COMPETITOR>	9000000 (Name = APRA)		
<DATE>	<form: dd.mm.yyyy – Date should make sense in context>		
<PAYER>	100000		
<PRODUCT>	H11		
<CONTACT PERSON>			Depending on your choice in the beginning – see the <i>Partner</i> tab page.
<SALES MANAGER>	10000		
<SALES EMPL>	10010		

2.2 Preceding Process

The scenario described in this *Business Process Documentation* is part of a bigger chain of integrated scenarios. So, as an option, you have first completed the following business processes and conditions before you start any activities in this scenario:

Business condition	Scenario
Some opportunities were created as a follow-up activity within scenario C30 - <i>Lead Management</i> .	<i>Lead Management (C30)</i>

2.3 Roles

Use

The following roles must have been created to test this scenario using the SAP CRM WebClient UI. The roles in this Business Process Documentation need to be assigned to the system user(s) testing this scenario.

Log on the CRM WebClient UI with the following users:

Business Role	Bus. Role ID	System User	Employee	Password
BP Sales Employee	BP_SLS_EMPL	SALES_EMPL	Michael Curtis	welcome
BP Sales Manager	BP_SLS_MAN	SALES_MAN	Jennifer Stone	welcome

2.4 Preliminary Steps

2.4.1 Log on to CRM WebClient UI

Use

The purpose of this activity is to describe how the sales employee gets first-time access to the SAP CRM WebClient UI. There are two options: Access from SAPGUI or via URL.

Prerequisites

The appropriate SAP CRM WebClient role for the sales employee has been assigned to the sales employee user (*SALES_EMPL*) in the CRM system.

Procedure

1. Close all open browser windows.
2. Access the SAP CRM WebClient UI:

Option 1: Access from SAP GUI via Transaction:

1. In the input field for transactions, enter transaction *CRM_UI* and press *Enter*.

Option 2: Access from SAP GUI via BSP Application:

1. Log on to the CRM system with the user for the BP Sales Employee.
2. From the SAP menu choose *Favorites*. From the context menu, choose *Add Other Objects*.
3. Select URL type *BSP Application*.
4. Enter the following data:

Field name	User action and values
BSP Applicat.	CRM_UI_START
Description	CRM WebClient UI
Start Page	default.htm

5. Choose *Continue*.
6. Choose *CRM WebClient UI* from the Favorites.
7. In the dialog box *Connect to <hostserver>* enter the following data and choose *OK*:

Field name	User action and values
User name	SALES_EMPL
Password	welcome

Option 3: Access via URL:

The CRM WebClient UI can also be accessed using a Uniform Resource Locator (URL). The URL of the CRM WebClient UI is:

[http://sapds5.pal.sap.corp:8003/sap\(bD1lbiZjPTAwMSZkPW1pbq==\)/bc/bsp/sap/crm_ui_start/default.htm](http://sapds5.pal.sap.corp:8003/sap(bD1lbiZjPTAwMSZkPW1pbq==)/bc/bsp/sap/crm_ui_start/default.htm)

Note: Make sure the proxy settings are correctly set for the browser.

Result

You have entered the SAP CRM WebClient user interface as BP Sales Employee with user *SALES_EMPL*.

3 PROCESS OVERVIEW TABLE

Process step	Business condition	Business role	Expected results
Creating an Opportunity Manually		Sales Employee	Opportunity created
Creating an Opportunity Based Upon an Activity	Activity accomplished	Sales Employee	Opportunity created out of an activity
Creating an Opportunity via Workflow from Lead Management	Follow-up transaction out of a lead	Sales Employee	Opportunity created via workflow as a result of lead management
Identify Opportunity	Data collected	Sales Employee	Opportunity has been further processed
Qualify Opportunity	Additional data collected	Sales Employee	Opportunity has been qualified
Quotation	Additional data collected	Sales Employee	Quotation created
Decision	Feedback / verbal agreement received	Sales Employee	Opportunity won
Close	Conditions negotiated, outcome analyzed	Sales Employee	Opportunity closed, activities finished
Sales Order	Quotation created and accepted by customer	Sales Employee	Sales order created
Opportunity Reporting		Sales Manager	Sales pipeline has been analyzed

4 PROCESS STEPS

4.1 Creating Opportunities

4.1.1 Creating an Opportunity

Use

This process describes three different starting points for the creation of an opportunity:

1. Manual creation of an opportunity
2. Creation of an opportunity based on an activity
3. Automatic creation of an opportunity creation using workflow as a result of lead management.

Once an opportunity is created using one of these steps, there will be no further differentiation concerning the opportunity's origin in the document. The structure of the document will follow the phases of the sales cycle:

1. Identify Opportunity
2. Qualification
3. Quotation
4. Decision
5. Close
6. Sales Order

Prerequisites

You must have completed all steps of the installation of SAP Best Practices for CRM Opportunity Management.

4.1.2 Creating an Opportunity Manually

Use

Use this process to maintain an opportunity without a preceding document.

Procedure

1. Log on to the CRM WebClient as sales employee (SALES_EMPL / welcome).
2. Access the transaction choosing the following navigation option:

Navigation Bar	Sales Cycle → Create: Opportunity
-----------------------	-----------------------------------

3. In the work area *BP Opportunity: New*, maintain the following entries:

Field name	Description	User action and values	Comment
Description		Opportunity for product <PRODUCT>	Describes the opportunity.
Prospect	Business Partner Number	<PROSPECT>	

4. Choose *Enter*.
5. Select one contact person from the proposed contact persons, which are derived from the maintained business partner master data and select *Choose*.
6. The *Employee Responsible* field is initially filled with the business partner assigned to your user.
7. Make the following entry:

Field name	Description	User action and values	Comment
Closing Date	Estimated closing date for the sales cycle.	<DATE> for example, Starting Date + 3 months	Closing date must be greater than the start date.

8. Choose *Enter*.

- Choose Save.

Result

An opportunity has been manually created. After saving you will see the unique number of your transaction in the field *ID* next to the description.

4.1.3 Creating an Opportunity Based on an Activity

Use

Use this procedure to create an opportunity from an accomplished activity, for example, *Visit according to campaign* with the prospect.

Prerequisites

An activity has been maintained previously. See the corresponding BPD for Activity Management.

Procedure

- Access the transaction choosing the following navigation option:

Navigation Bar	<i>Activities</i> → <i>Search: Activities</i>
-----------------------	---

- Choose the following search criteria:

Field name	Description	User action and values	Comment
Employee Responsible ID		<SALES EMPL>	

- Choose *Search*.
- Select the activity for which you want to create a follow-up transaction (opportunity) by clicking on the description.
- From the work area toolbar, choose *More* → *Follow up*.
- Choose Transaction Type *BP Opportunity*.
- If you have chosen a *BP Visit with Prod.*, you have to select the products which are of interest for the opportunity. If you have an activity without products, proceed to step 8.
- Select one contact person from the proposed contact persons, which are derived from the maintained business partner master data and select *Choose*.
- Make the following entries:

Field name	Description	User action and values	Comment
Closing Date	Estimated closing date for the sales cycle.	<DATE> for example, Starting Date + 3 months	Closing date must be greater than the start date.

- Choose Save.

Result

An opportunity is created out of a former activity. After saving, you will see the unique number for your transaction in the field *ID* next to the description.

4.1.4 Creating an Opportunity via Workflow from Lead Management

Use

In this procedure, the opportunity was already created via workflow as a result of lead management.

Prerequisites

The Lead Management scenario has been configured.

You have created an opportunity as a follow-up transaction from a lead.

Result

An opportunity was automatically created as a follow-up transaction from a lead. More information can be found in the *Lead Management Business Process Documentation*.

4.2 Maintaining Opportunities

Use

The sales cycle for a product or service is divided into various sales stages and begins with the recognition of a sales opportunity. This can arise by chance, for example, if a sales employee finds out about a worthwhile investment project during a conversation. The process ends with a sales order or a rejection by the customer. In the meantime, various sales activities take place, such as providing information material, customer visits, product presentations, quotations, and contractual negotiations. An opportunity leads through the sales stages of a sales cycle. Specific sales activities are proposed by the system and can be activated depending on the various sales stages. The sales cycle with the relevant sales stages helps your company to follow a standardized sales process.

4.2.1 Sales Stage 1: Identify an Opportunity

Use

Use this procedure to maintain the opportunity with data collected during sales stage 1, such as gathering general information concerning the prospect and the preparation of a visit.

Prerequisites

An opportunity has been created.
You are logged on to the CRM WebClient UI with the system user for the sales employee.

Procedure

1. Access the activity by choosing the following navigation option:

Navigation Bar	<i>Sales Cycle</i> → Search: <i>Opportunities</i>
-----------------------	---

2. In the work area *Search: Opportunities*, choose the following search criteria and make the following entry to search for an existing opportunity:

Search criteria	Operator	Values	Comment
Prospect ID	is	< PROSPECT >	You can also use the input help.

3. Choose *Search*.
4. Select an opportunity from the result list by clicking on the description.
5. Choose *Edit* to maintain the following entries in the assignment block *Opportunity Details*:

Field name	Description	User action and values	Comment
Sales Stage	Current phase of the opportunity	Identify Opportunity	The <i>Chance of Success</i> changes to 10%.
Status		In process	
Origin		<Select an origin>	
Priority		<Select a priority>	

6. Choose *More* → *Sales Assistant*. Depending on the phase of the opportunity, the sales assistant suggests certain actions that should be considered during this phase. Here you will find the suggested actions for the current phase.

7. To automatically create an activity, the corresponding action has to be activated. For example, select the action *Gather Information on Customer*, and choose *Activate*.
8. Choose *Back*.
9. Choose *Save*.
10. The system automatically creates activities for you out of that action. You can see them in the assignment block *Planned Activities*.
11. Click on the description of the activity of interest to switch into the activity, for example, *Gather Information on Customer*.
12. Choose *Edit* in the assignment block *Task Details* and maintain the following values:

Field name	User action and values	Comment
General Data		
Employee		Use this field to delegate the activity to colleagues.
Start Date	<DATE>	
Due Date	<DATE>	Date by which the activity should be done.
Active Status	In Process	
Notes		Here you have the possibility to write down the results of your activities.

13. Choose *Save and Back*



Remember that the completion of the created activities is not mentioned in this document. For completion, please refer to the corresponding BPP for Activity Management.



Alternatively, you can complete the activities by simply clicking *Close* in the assignment block *Planned Activities*.

14. As soon as an activity has been completed (Status *Completed*), it will be displayed in the assignment block *Completed Activities* of the opportunity.

Result

The opportunity has been further processed. Two activities within sales stage 1 have been generated and distributed to the responsible employees. As soon as they are completed you can move on to sales stage 2 of the sales cycle.

4.2.2 Sales Stage 2: Qualify Opportunity

Use

Use this procedure to maintain the opportunity with data gained in sales stage 2, such as requirements analysis, the prospect's decision-making process, and the defined sales team.

Prerequisites

An opportunity has been created.

Procedure

1. Access the activity by choosing the following navigation option or continue with step 3 if you are already in the maintenance activity for opportunities.

Navigation Bar	<i>Sales Cycle</i> → Search: <i>Opportunities</i>
-----------------------	---

2. Search for the opportunity maintained in the preceding activity.

3. Choose *Edit* in the assignment block *Opportunity Details* and maintain the following entry:

Field name	Description	User action and values	Comment
Sales Stage		Qualification	The <i>Chance of Success</i> changes to 20%

4. Choose *More* → *Sales Assistant*. Depending on the phase of the opportunity, the sales assistant suggests certain actions that should be considered during this phase. Here you will find the suggested actions for the current phase.
5. To automatically create an activity, the corresponding action has to be activated by selecting the action and choosing *Activate*.
6. Choose *Back*.
7. Choose *Save*.
8. The system automatically creates an activity for each activated action. You see them in the assignment block *Planned Activities*.
9. With a clearer idea of the opportunity, you are able to set some milestones. To do so, choose assignment block *Milestones* and maintain dates for the following entry by clicking on *Edit List*.



To display the assignment block *Milestones*, choose *Personalize*. Select *Milestones* from the list *Available Assignment Blocks* and choose *Move to Right* and then *Save*.

Field name	Description	User action and values	Comment
Demonstration		<DATE>	Date of demonstration

10. Choose *Enter*.
11. After you have completed the activities, you should be able to maintain products for the opportunity.
12. To maintain products for the opportunity, open the assignment block *Items* and maintain the following entries by clicking on *Edit List*:

Field name	Description	User action and values	Comment
Product ID		<PRODUCT>	
Quantity		1000	
Expected Total Value			The expected total value is filled automatically.

13. Choose *Enter*.
14. In the assignment block *Opportunity Details*, choose *Edit* to maintain the following entries:

Field name	Description	User action and values	Comment
Expected Sales Vol.		Enter the amount, which usually covers about 90% of the Expected Total Value	

15. Choose *Save*.
16. Open assignment block *Contacts* and choose *New* to maintain the following entries:

Field name	Description	User action and values	Comment
Function		Decider	
Contact		<CONTACT PERSON>	

17. Choose *Back*.

18. Choose *Edit List* in assignment block *Sales Team* and maintain the following entries:

Field name	Description	User action and values	Comment
Function		Sales Manager	

19. Open assignment block *Milestones* and choose *Edit List* to maintain the following entries:

Field name	Description	User action and values	Comment
Initial Requirement Analysis		<DATE> <TO DATE>	
Go/No-Go Decision		<DATE>	
Develop Proposed Solution		<DATE> <TO DATE>	
Quotation		<DATE>	
Customer Decision		<DATE>	



To maintain a start and end date for the milestones *Initial Requirement Analysis* and *Develop Proposed Solution*, the column *Date To* has to be inserted. Choose *Personalize* in the assignment block *Milestones* and select *Date To* from the list *Available Columns*. Then choose *Move to Right* and *Save*.

20. Choose *Enter*.

21. During a sales visit, you may have acquired data concerning the competitors involved in this opportunity. Choose assignment block *Competitors* and *New* to maintain the following entries:

Field name	Description	User action and values	Comment
Function		Competitors	
Competitor	BP no. of competitor	<COMPETITOR>	

22. Choose *Back*.

23. Assess the opportunity via a survey to make a go/no-go decision. Choose the assignment block *Assessments* and click on the questionnaire *ID* to open the survey.

24. Maintain the answers to the posted questions by using the dropdown menu.

25. Choose *Save*.

26. Choose *Back*.

27. Depending on the maintained survey, the field *Calculated Chance* in the assignment block *Opportunity Details* will be automatically filled.

28. Choose *Save*.

Result

The opportunity has been further processed. New activities within sales stage 2 have been generated and distributed to the responsible employees. You have defined milestones for the opportunity, maintained data for competitors, for the sales team, and for the contacts.

4.2.3 Sales Stage 3: Quotation

Use

Use this procedure to change the opportunity with data gained in sales stage 3, for example, by extending the opportunity with the development of a solution proposal.



This step requires integration with SAP ERP, because the quotation is directly created in the ERP system. Skip this step if you are using a standalone CRM system.

Procedure

1. Access the activity by choosing the following navigation option or continue with step 3 if you are already in the maintenance activity for opportunities.

Navigation Bar	<i>Sales Cycle → Search: Opportunities</i>
-----------------------	--

2. Search for the opportunity maintained in the preceding activity.
3. Choose *Edit* in the assignment block *Opportunity Details* and maintain the following entries:

Field name	Description	User action and values	Comment
Sales Stage		Quotation	The <i>Chance of Success</i> changes to 50%

4. Choose *Save*.
5. Choose *More → Sales Assistant*. Depending on the phase of the opportunity, the sales assistant suggests certain actions that should be considered during this phase. Here you will find the suggested actions for the current phase.
6. To automatically create an activity the corresponding action has to be activated by selecting the action and choosing *Activate*. Activate at least the action *Create Quotation*.
7. Choose *Back*.
8. Choose *Save*.
9. After the completion of these tasks, you should be able to create a quotation for the prospect. Make sure that there is no red traffic light detailing missing data for the opportunity. On the *BP Opportunity* screen, choose the function *Create Follow-Up* from the work area toolbar. The system needs to save your current opportunity to create a quotation.
10. The system offers you several transaction types for creating a follow up. Choose *Category Description 'ERP Quotation' / Transaction Type Description 'BP Quotation'* (You may have to scroll down to find this entry).
11. The system may offer you the previously discussed/requested products of the opportunity. Choose the products you want to copy. The system automatically creates an item for the quotation.
12. The system may offer you several business partners that are maintained as payers for the opportunity's business partner. Choose one payer.
13. Enter a *Valid to date*.
14. Choose *Save*.
15. Choose *Back*.

Normally, the quotation now passes through a phase of iterative changes, such as price changes or changes in the amount of the items.

Result

The opportunity has been further processed. New activities within sales stage 3 have been generated and distributed to the responsible employees. You also have created a quotation based on the data from the opportunity.

4.2.4 Sales Stage 4: Decision*Use*

Use this procedure to change the opportunity with data collected in sales stage 4, for example, to extend the opportunity with the feedback from the previous phases. You may also work on a verbal agreement to sign the deal.

Procedure

1. Access the activity by choosing one of the following navigation options or continue with step 3 if you are already in the maintenance activity for opportunities.

Navigation Bar	<i>Sales Cycle → Search: Opportunities</i>
-----------------------	--

2. Search for the opportunity maintained in the preceding activity.
3. In the assignment block *Opportunity Details*, choose *Edit* from the toolbar to enter the following:

Field name	Description	User action and values	Comment
Sales Stage		Decision	The <i>Chance of Success</i> changes to 80%

4. Choose *Save*.
5. Choose *More* → *Sales Assistant*. Depending on the phase of the opportunity, the sales assistant suggests certain actions that should be considered during this phase. Here you will find the suggested actions for the current phase. Activate the suitable actions. To do this, highlight the corresponding action and choose *Activate*.
6. Activate at least the action *Secure Verbal Agreement*. To do so, highlight this action and choose *Activate*.
7. Choose *Back*.
8. Choose *Save*.

Result

The opportunity has been further processed. New activities within sales stage 4 have been generated and distributed to the responsible employees.

4.2.5 Sales Stage 5: Close

Use

Use this procedure to close the opportunity with data collected in sales stage 5. In this phase you will negotiate the conditions for the sales order as well as analyze reasons for success or failure.

Procedure

1. Access the activity by choosing one of the following navigation options or continue with step 3 if you are already in the maintenance activity for opportunities.

Navigation Bar	Sales Cycle → Search: Opportunities
-----------------------	-------------------------------------

2. Search for the opportunity maintained in the preceding activity.
3. In the assignment block *Opportunity Details*, choose *Edit* from the toolbar to make the following entries:

Field name	Description	User action and values	Comment
Sales Stage		Close	The <i>Chance of Success</i> changes to 100%

4. Choose *Save*.
5. Choose *More* → *Sales Assistant*. Depending on the phase of the opportunity, the sales assistant suggests certain actions that should be considered during this phase. Here you will find the suggested actions for the current phase.
6. To automatically create an activity, the corresponding action has to be activated by selecting the action and choosing *Activate*.
7. Choose *Back*.
8. After completing the activity *Analyze Reasons for Success or Failure*, edit the *Opportunity Details* assignment block and adjust the status.
9. Choose *Edit* in the assignment block *Opportunity Details* and make the following entries:

Field name	Description	User action and values	Comment
Status		Won or Lost	Won: The <i>Chance of Success</i> remains at 100%

			Lost: The <i>Chance of Success</i> changes to 0%
--	--	--	--

10. Choose *Save*.

Result

The opportunity has been closed. You performed the necessary activities for the last sales stage and changed the status. Depending on the selected status, the system provides different reasons to further specify the chosen status.

4.2.6 Sales Order Creation

4.2.6.1 Creating a Sales Order from a Quotation

Use

The ERP Quotation that was created in Sales Stage 3 can be transferred into an ERP Sales Order.



This step requires integration with SAP ERP, because the sales order is directly created in the ERP system.

Skip this step if you are using a standalone CRM system.

Procedure

1. Access the activity by choosing the following navigation options or continue with step 3 if you are already in the maintenance transaction for ERP Quotations.

Navigation Bar	<i>Sales Cycle → Search: Opportunities</i>
-----------------------	--

2. Search for the opportunity maintained in the preceding activity.
3. From the assignment block *Transaction History*, navigate to the quotation.
4. Add additional information to the Quotation if necessary.
5. After the completion of these tasks, you should be able to create a sales order for the prospect. Make sure that there is no red traffic light about missing data for the quotation. On the *BP Quotation* screen, choose function *Create Follow-Up* from the work area toolbar. The system needs to save your current Quotation to create a Sales Order.
6. The system offers you several transaction types to create a follow up. Choose *Category Description 'ERP Sales Order' / Transaction Type Description "Standard Order"* (You may have to scroll down to find this entry).
7. Enter a value for field *External Reference*.
8. Choose *Save*.
9. Choose *Back*.

Result

The quotation has been further processed. You have created a sales order in ERP based on the data of the quotation.

4.2.6.2 Creating an ERP Sales Order Directly (Optional)

Use

You can also create an ERP sales order directly without reference to an opportunity or a quotation.



Certain restrictions apply to this function. Therefore, it should only be used by sales employees that occasionally work in SAP ERP.

You can find extensive information about these restrictions in SAP Note 1078575.



This step requires integration with SAP ERP, because the sales order is directly

created in the ERP system.
Skip this step if you are using a standalone CRM system.

Procedure

1. Access the transaction by choosing the following navigation option:

Navigation Bar	Sales Cycle → Create: ERP Sales Order
-----------------------	---------------------------------------

2. Make the following entries:

Field name	Description	User action and values	Comment
Sold-to Party ID		<PROSPECT>	Select a sales organization if a selection screen appears
Product ID		<PRODUCT>	
Qty	Quantity	Enter a quantity	
External Reference	Purchase Order Number	Enter a value	

3. Check assignment block *Incompletion Log* for entries and add missing values if required.
4. Choose *Save*.

Result

A sales order has been created directly in the ERP system.

4.2.6.3 Creating an Extended ERP Sales Order Directly (Optional)

Use

Sales order processing in ERP can be also be executed by calling the standard ERP transaction VA01 from the CRM WebClient.

This alternative can be used if your ERP sales order processing requires functionality not covered by the built-in ERP sales order using the WebClient.



This step requires integration with SAP ERP, because the sales order is directly created in the ERP system.
Skip this step if you are using a standalone CRM system.

Procedure

1. Log on to the CRM WebClient as sales manager.
2. Access the activity by choosing the following navigation option:

Navigation Bar	Sales Cycle → Create: ERP Sales Order (Extended)
-----------------------	--

3. Enter *Order Type TA* and choose *Enter*.
4. Make the following entries:

Field name	Description	User action and values	Comment
Sold-to Party		<PROSPECT>	Select a sales organization if a selection screen appears.
PO Number		Enter a PO number	
Material		<PRODUCT>	
Order Quantity		Enter a quantity	

5. Choose *Enter*.
6. Choose *Menu* → *Edit* → *Incompletion Log*.
7. Add missing values if required.
8. Choose *Save*.
9. Choose *Back*.

Result

A sales order has been created directly in the ERP system.

5 REPORTING

Use

This section describes which reports exist for Opportunity Management and briefly describes the content of the reports.

For an overview of how to navigate within the reports, refer to the Business Process Documentation (User Guide) of the relevant Analytics scenario (Interactive Reporting or BI Reporting). The reports you will be able to view depends on which Analytics scenario you have implemented (Interactive Reporting or BI Reporting).

5.1 SAP CRM Interactive Reporting

Procedure

1. Log on to the CRM WebClient UI as BP Sales Manager (*SALES_MAN*) or as BP Sales Employee (*SALES_EMPL*) if not already done.
2. In the Work Center Link Group *Reports* you can find the available reports. Choose the report you want to display.

Reports

Accounts with Open Opportunities:

This report shows the accounts with open opportunities and their number as well as the expected sales volume (weighted).

Closed Opportunities:

This report shows the number of closed opportunities grouped by their status (won, lost, and so on) and their sales stage. The weighted expected sales volume (net value * probability of success) is also displayed.

Opportunity Sources:

This report shows the number of opportunities and their expected sales volume (weighted and not weighted) for each origin. They are grouped by date and sales stage. The report enables sales managers to analyze which origins are more successful than others and to develop actions from the figures.

Opportunity Pipeline:

This report can be used in order to see how far along opportunities are in the opportunity pipeline. For each month, the net value of the opportunities that have the current month as closing date is displayed (split into the different opportunity stages (identify opportunities, qualification, quotation, and so on)).

Win/Loss Analysis by Reason:

This report shows the number of opportunities, their chance of success, and the expected sales volume for won and lost status. The figures are grouped by reason as well as sales stage, so it is possible to analyze whether particular reasons in specific stages led to won or lost opportunities. This gives the sales team a chance to work on these issues.

5.2 BW Reporting

Procedure



Opening the reports from the WebClient UI is only possible if you have carried out all the necessary configuration steps described in the *BS4 Basic Configuration CRM Analytics Configuration Guide*.

Alternatively you can log on to the BW system and open the business user role I15_03U. In this business user role, you will find a broad range of BI reports for all areas.

1. Log on to the CRM WebClient UI as BP Sales Manager (*SALES_MAN*) if you have not already done so.
2. In the Work Center Link Group *Reports*, you can find the available reports. Choose the report you want to display.

Reports

From the WebClient UI the following BW reports are available for Opportunity Management:

Opportunity Pipeline Analysis:

This web template provides an overview of the opportunities that are expected to be closed within the next six months. It takes values from opportunities with the statuses *Open* or *In Process*.

Opportunity Funnel Analysis:

This web template displays opportunity values by organizational units.

Sales Pipeline Analysis:

This report displays opportunity values as well as values of quotations.

BP Sales Pipeline:

This report displays opportunity values as well as values of ERP quotations and ERP sales orders.

Incoming Orders per Month:

This report displays data on incoming orders, which is retrieved from the ERP system.