

ERP –CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

Introduction to CRM packages
SAP history and evolution
Introduction to SAP-CRM
CRM architecture
ASAP methodology

ERP –SALES & DISTRIBUTION (BASE)

Introduction to SAP-R/3
Enterprise structure
Customer master
Material master
Pricing
Sales transactions (Inquiry, quotation, order)
Header control, item category control, schedule line control
Delivery
Billing

BASE CUSTOMIZATION

1. Business partners

BP type & roles, grouping
BP relationships
Partner functions
Configuring field attributes
Number range settings

2. Organizational Management

Elements of organizational model
Creating position, employee & user
Organizational data determination

ERP Implementation, Project Management and Training

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3. Product master

Product type & grouping
Hierarchies, category dissent type and attributes
Number assignments
View id
Basic settings
Relationships of products

4. Territory management

Territory ID
Assignment of territory to org.model
Assignment of bp to territory

5. Partner processing

Partner functions
Partner determination procedure
Access sequence

6. Actions

Action profile
Action definition
Processing form
Action monitor

7. Date management

Date profile
Duration, date type, date rule

8. Status profile

User status
Status in transactions
Status in user authorization

9. Pricing

Putting fields into field catalogue
Creating condition tables
Creating the access sequence
Creating condition types
Creating pricing procedure
Pricing procedure determination
Creating condition record
Condition maintenance group

10. Text determination

Text determination procedure
Text object
Text ID

11. Credit management

12. Incompleteness

13. Output determination

14. Copy control

15. Billing

SALES

1. Introduction to basic sales cycle

2. Significance of header and item category control data

3. Structure of sales transactions

4. Activity management

Types of activities
Activity document structure
Basic settings
Activity monitor
Header and item category control data
Activity journal
Follow up transactions

5. Lead management

Lead document structure
Creating lead from activity
Header and item category control data
Lead priorities, group and origin

6. Opportunity management

Opportunity document structure
Create opportunity from lead
Header and item category control data
Sales life cycle and phases
Opportunities priorities, group and origin

7. Quotation/Order in CRM

Structure of quotation/order
Header and item category control data
Schedule line concept in quotation/order
Basic settings

8. Document flow

Detail view
Overview

MARKETING & CAMPAIGN MANAGEMENT

1. Business partner segmentation

Business partner attributes
Set types
Maintaining data source for Segment builder
Segment builder
Creating target groups

2. Creating marketing plan, marketing plan element, campaign and campaign element

Define objective, tactics, campaign types
Define partner determination procedure for campaign
Actions in campaign
Communication channel
Define transaction types for campaign
Assign BP segments to campaign
Survey settings

3. Personalized mail form

Maintain E-mail form and survey URL
Maintain subject line
Maintain attachments

4. Marketing calendar

Define search criteria
Assign search criteria
Assign graphic profile for marketing calendar
Define views for marketing calendar
Define search query

5. External list management

Define uploading file
Maintain mapping format for external lists
Activate check

MIDDLEWARE

Middleware overview
Concepts of CRM middleware
Replication administration
Administration console
Data exchange with R/3 backend
Monitoring and error handling

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