



**Course** : SAP CRM 5.0  
**Type** : Hands-On Training

### Course Content:

- Introduction to CRM
- Architecture and components
- Introduction in People-centric CRM (PC UI)
- Master Data
  - Business partner
  - Organizational model
  - Product master
- CRM business transactions
- Activity management
- Partner determination
- Actions
- CRM Sales
  - Call planning
  - Activity management in mySAP CRM Sales
  - Area management
  - Opportunity Management
  - Copy control
  - Quote management
  - Order management
  - Special functions in quote and order management
  - Pricing in mySAP CRM Sales
  - Contract management
  - Rebate processing
- SAP CRM E-Commerce solutions
  - Web shop administration (Web-based)
  - Superuser / user administration
  - Maintaining and explaining the product catalog (views, documents, BAdIs, product catalog export, external catalogs, Web-based maintenance. ..
  - Pricing in the Web shop using the Internet Pricing Configurator (IPC) - Marketing functions
  - E-service
  - Additional functions
- SAP CRM Service



- Installed base management:
- Service contract processing:
  - Service agreements
  - Service contracts
  - Service plans
  - Usage-based billing
- Service order processing:
  - Resource planning
  - Service confirmation
  - Service billing
  - Product service letter
  - Warranty claims
- Complaints and returns processing:
  - Complaints and returns
  - In-house repair processing
- Case management
- IC Win client
  - Introduction, terminology
  - Architecture, landscape
  - Agent functions and processes in the IC
  - Creating IC profiles
  - Configuring components
  - IC management functions - Call lists – Scripting
- IC Web Client
  - Architecture and technology
  - Agent functions and operating the IC
  - Creating IC profiles
  - Configuring components such as the navigation bar and the transaction launcher
  - IC manager portal:
    - IC manager dashboard
    - Management call lists
    - Interactive scripting
    - IC workforce management
- Marketing management in mySAP CRM
- Marketing and campaign planning
- Planning and performing marketing projects
- Marketing Calendar



MEGA informatics

- Overview of marketing analytics
  - Personalized mail forms
- Segmenting business partners
- Lead Management
- Campaign automation
- External List Management
- Special functions in campaign management
- Couponing
- CRM Middleware
- Connecting an SAP back-end system to an SAP CRM system:
  - CRM Middleware / administration console
    - Messaging BDoc
    - Initial load / delta load / request
    - Data flow, configuration and monitoring
- Connecting an external system using the XIF adapter
- Architecture and technical configuration for field applications (mobile):
  - CRM Middleware: synchronizing BDoc and consolidated database
  - Minor / major realignment
- Analytical CRM
- Analytical methods:
  - Measurement (data extraction and reporting)
  - Forecasts (data mining with a decision tree, scoring, association analysis, ABC classification)
  - Optimizing (using analytical results in CRM processes)
  - Planning (CRM planning applications)
- Analytical scenarios:
  - Interaction channel analyses
  - Customer analyses
  - Marketing analyses
  - Sales analyses
  - Service analyses