Groupware and Mail Integration
Detailed View

SAP Enhancement Package 2 for SAP CRM 7.0
Agenda

• Introduction
• Business Processes
• Groupware Solutions
  – Server-Based Groupware Integration
  – Client-Based Groupware Integration
  – Comparison Overview
• One-to-One Mail Collaboration
Introduction
Collaboration in CRM is important:

You can only acquire real competitive advantage, if you know your customers’ requirements, and if you have a precise knowledge of their way of doing their business.

Relationship management should not only be limited to single customer encounters: only long term relationships bring real chances and value to your corporation.

A sales employee is the “Manager“ of a business relationship. A sales employee has to be familiar with, and know about all customer contacts and manage their expectations.

The Sales employee has to be the manager of his people collaboration network.
Today’s Challenges in People Collaboration

In a sales life that is getting faster and more and more outside in driven, sales people need to ensure that they manage and control the entire sales process.

Sales Professionals need to ensure that account and contact information can be used across CRM and groupware platforms by both, CRM and non-CRM users.

Exchanging appointments and tasks between CRM and groupware enables all employees to focus 100% on their customers and gain the full 360° customer view.

CRM users need a CRM system that supports closed loop mail processes as part of activity management for inbound and outbound mails in CRM.
Business Processes
Business Processes

In SAP CRM users can utilize groupware integration for three main processes that allow a deeper integration of SAP CRM and Groupware programs and collaboration between customer facing professionals.

**Account Management**
Sales professionals can maintain account and contact information in Groupware and SAP CRM including automatic synchronization. This ensures data consistency of account and contact information in both Groupware and SAP CRM.

**Appointments and Tasks**
Sales people can plan and record CRM-relevant activities in both Groupware and SAP CRM such as appointments and update them if required. Tasks can be planned and tracked also in Groupware and SAP CRM. All such activities are exchanged between the Groupware system and SAP CRM.

**Activity Management with Mail Collaboration**
„One-to-One Mail Collaboration“ enables users to send mails directly from SAP CRM and keep it together with other activities filed with the customer. Additionally, users can receive mails in the Groupware system and transfer them to CRM. The result is the availability of all CRM-related mails in SAP CRM.
Business Processes in Detail

Account and Contact Integration

Supported processes
Create an account and contact in SAP CRM and replicate them to a contact in Groupware.
Create a contact in Groupware and replicate to SAP CRM as an account and contact.
Change an account or contact in SAP CRM that were replicated from Groupware and synchronize the changes back.
Change a contact in Groupware that was created out of an account and contact in SAP CRM and synchronize the changes back.
Delete contacts in Groupware and remove corresponding contact in SAP CRM and vice versa.

Additional functions
Replication support for private contacts
Business Processes in Detail

Appointment Integration

**Supported processes**

Create an appointment in Groupware with a specific category and synchronize it to SAP CRM.

Create an appointment in SAP CRM and synchronize it to Groupware.

Change an appointment in Groupware that was originally created in SAP CRM and replicate changes back.

Change an appointment in SAP CRM that originally was created in Groupware and replicate changes back.

Delete an appointment in Groupware that originally was created in SAP CRM and remove it from SAP CRM.

Delete an appointment in SAP CRM that originally was created in Groupware and remove it from the Groupware.
Business Processes in Detail

Appointment Integration

**Additional functions**
Send updates of appointments, including internal attendees.
Attachments to appointments are also replicated*
  - e.g. Customer fact sheet replication
View appointments in both, Groupware calendar and SAP CRM calendar

* With MS Exchange/Outlook only
Task Integration

**Supported processes**
Create a task in Groupware with a specific category and synchronize it to SAP CRM.
Create a task in SAP CRM and synchronize it to Groupware with the correct employee responsible information.
Change a task in Groupware (e.g. set a new status) that was originally created in SAP CRM and replicate changes back.
Change a task in SAP CRM (e.g. set a new status) that was originally was created in Groupware and replicate changes back.
Delete a task in Groupware that originally was created in SAP CRM and remove it from SAP CRM.
Delete a task in SAP CRM that originally was created in Groupware and remove it from the Groupware.

**Additional functions**
Attachments to tasks are also replicated*

* With MS Exchange/Outlook only
Business Processes in Detail

Closed Loop Mail Integration

**Inbound mail**
Select a mail in the Groupware inbox and transfer a copy to SAP CRM. Save the mail including all attachments with a link to the account, contact and sales documents (e.g. opportunity or quotation)

**Outbound mails**
Send a mail from SAP CRM including
- Attachments
- Using HTML editor for formatted mail texts
- The address books provides all CRM accounts and contacts, private contacts, distribution lists from Groupware
- Mail is saved in Groupware „Sent Items“ and CRM in the context of the account, contact or a specific transaction
- Features like Forward and Reply available directly in SAP CRM
Groupware Solutions

Server-Based Groupware Integration
**Functional Scope of CRM Groupware Integration**

SAP offers two different packages of Groupware Integration: server-based and client-based.

### Area | Scope
--- | ---
General | - Supports Lotus Domino and MS Exchange  
- Includes replication of attachments (for MS Exchange/Outlook only)
Activities | - Bi-directional replication of appointments and tasks between CRM and Groupware
Contacts | - Replication of CRM Contacts to Groupware contacts
Mail Integration | - Send mails from CRM and store them with the customer file in CRM  
- Import mails received in groupware mail Inbox to CRM and track them as customer interaction

### GWI type | Scope
--- | ---
Server-based Groupware Integration | - Backend integration without user interaction  
- Replication of CRM contacts in Groupware contacts  
- To public folder bidirectional, to private folder incl. relationship data unidirectional from CRM to Groupware
Client-based Groupware Integration | - End-user focused integration  
- Locally installed software  
- Users can change the local settings  
- Bi-directional contact replication in private folder
Server-Based Groupware Integration – Architecture

The server based Groupware integration is a messaging based solution to transfer SAP CRM data to the Groupware and back.

The landscape consist of three components

- CRM Adapter
- CRM Mapbox
- Groupware Connector

The system allows a centralized setup and monitoring by the IT department. Sales Professionals do not have to do any manual work to see activities replicating between systems.

This architecture is best for the integration of Mobile Sales scenarios and highly specific applications like Interaction Center or Service dispatching.
Server-Based Groupware Integration – Architecture*

* For Microsoft Exchange 2003 and 2007, Lotus Domino 7.0x, 8.0x and 8.5x
Server-Based Groupware Integration – Architecture

Server-based Customizing includes Connector and CRM Backend Customizing

Customizing in SAP CRM includes:
- Mapping tables from CRM <-> Groupware
- Site definitions for replication

The connector Admin Tool includes:
- Connector specific settings for Lotus Domino and MS Exchange
- Monitoring capabilities for queues and Connector instances (Proxies)
Groupware Solutions

Client-Based Groupware Integration
Client-Based Groupware Integration – Architecture

Front-End integration of CRM UI (backend) and groupware client application

The client based groupware integration directly connects SAP CRM Server with the local Groupware client.

The landscape consist of three components
- CRM SICF Framework (server) for reading/writing data
- Client GWI application
- Client Groupware API

The system needs to be setup by every end-user of using SMS installer (or compatible) services. Synchronization process runs on the local machine and can be started either automatically or manually. The user controls the replication completely and can influence the conflict handling.
MS Outlook Add-In enables the user to link the appointment to CRM objects like:

- Account
- Contact
- Employee Responsible
- Reference Document e.g. Opportunity (depends on the object reference profile in IMG)
Users can enable or disable the automatic synchronization

Users can define on which days the sync should be performed

The data conflict handling privilege for the automatic synchronization can be defined different from the standard conflict handling defined on the page “Confirmation and Conflicts”
Client-Based Groupware Integration – Settings

The client-based GWI has two parts of administration, SAP CRM backend Customizing and user-based personalization.

Admin Customizing in SAP CRM includes:
- Defaulting for transaction types and categories,
- Relationships to identify users accounts and contacts,
- Mapping of activity status with CRM status.

Users can change local settings like:
- CRM login details
- Synchronization settings
- Replication timeframe
- Automatic sync
- Handling of sync conflicts
- Column personalization of the result lists.
Users can use Single Sign-On to run the SAP CRM application and the client-based Groupware integration fully integrated.

SAP CRM allows to determine the logon ticket in various ways, e.g. by Windows authentication or a certificate fetched from a local file.

For the automatic synchronization the Single Sign-On feature needs to be activated in the local client application.
Server sync profiles are used to control the client application by defining which local settings

- are defaulted
- are allowed to be changed locally
- are disabled for changing by the local user

Before synchronizing the client application checks for a valid profile and applies it
Groupware Solutions

Comparison Overview
Server-Based Versus Client-Based

On a high level the Groupware integration (GWI) solutions work different here:

<table>
<thead>
<tr>
<th>Area</th>
<th>Server-Based GWI</th>
<th>Client-Based GWI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Architecture</td>
<td>Message based data flow between servers</td>
<td>Direct CRM access over SICF to read and write data</td>
</tr>
<tr>
<td>Filter criteria</td>
<td>Subscription based replication rules</td>
<td>Filter based on current user with small customizing. Only data he is assigned to is getting replicated</td>
</tr>
<tr>
<td>Transaction types</td>
<td>Multiple transaction types allowed (using groupware category)</td>
<td>Default transaction type per Customizing</td>
</tr>
<tr>
<td>Monitoring</td>
<td>Centralized monitoring available</td>
<td>Conflict resolution screen shown to the end user. The user has full control over the data that is getting replicated</td>
</tr>
<tr>
<td>Appointments</td>
<td>Team appointments are supported</td>
<td>Team appointments are not supported</td>
</tr>
<tr>
<td>Accounts</td>
<td>Accounts and contacts only replicated from CRM to Groupware</td>
<td>Contacts replicated in both directions, accounts are not replicated separately</td>
</tr>
<tr>
<td>Address details</td>
<td>Customer can decide whether the standard or the relationship address is exchanged.</td>
<td>For contact persons, only relationship related data is replicated</td>
</tr>
<tr>
<td>Functions</td>
<td>Attachments without size limits only for MS Exchange, no support of attachments for Lotus Domino</td>
<td>Attachments without size limits only for MS Outlook, no support of attachments for Lotus Notes</td>
</tr>
<tr>
<td>Usage</td>
<td>Automatic synchronization</td>
<td>Manual or automatic synchronization by individual user</td>
</tr>
</tbody>
</table>
One-To-One Mail Collaboration
Inbound and Outbound Mail Flow

Mail Inbound

Start process

Receive new e-mail in Groupware Inbox

CRM relevant?

No

Yes

Transfer e-mail to CRM

View “Incoming e-mail List”

CRM

Categorize and assign business objects to e-mail

Create new CRM Activity of type e-mail

Transfer e-mail to CM

Content Management

Mail Outbound

Start process

Private address books

Public address books

CRM business objects - contact or quotes

CRM attachments - Word format, HTML, PDF

Create/Reply with outbound e-mail - word templates

Create new CRM activity of type e-mail

Groupware sent items

SAP Office Outbox

End process

Note:
For Microsoft Outlook the Inbound Scenario can be visualized either in CRM or Outlook front end. For Lotus Note the visualization is located in CRM.
Receiving Mails

CRM users can receive mails in two ways

**Mail Inbox in the CRM WebClient UI**

**Mail Inbox in Groupware front-end (direct CRM assignment using Add-In only available for Microsoft Outlook)**

**Receive mail process**

**Mail replication from Groupware to SAP CRM mail object (activity) including attachments**

Automatic account and contact determination based on senders mail address

Object assignment wizard for SAP CRM objects to define SAP CRM context of received mail

* MS Outlook only
** CRM WebClient UI only
Composing Mails

- CRM users can compose mails

In the CRM WebClient UI

- Send mail process

Easy access to mail capability in CRM business context (hyperlink on email address information)

Powerful mail editor

Incorporation of personal Groupware contacts in address book

Mail replication from SAP CRM (activity) to Groupware mail
Mail Integration – Architecture

The mail integrates to both the Groupware client and the SAP CRM backend. According to the implementation there are two ways the process can flow technically, pure client-based or hybrid client/server-based integration. The hybrid scenario is used in SAP CRM On Premise: mails are sent by the SAP CRM server (server based) while mails are received locally by the Groupware client.
## Groupware Integration

In general SAP CRM supports two Groupware platforms:

<table>
<thead>
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<th>Server-Based GWI</th>
<th>Client-Based GWI</th>
<th>Mail Collaborat.</th>
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</thead>
<tbody>
<tr>
<td>MS Exchange/Outlook 2003</td>
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<td>MS Exchange/Outlook 2007</td>
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<tr>
<td>MS Exchange/Outlook 2010</td>
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<td>X</td>
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<tr>
<td>Lotus Domino/Notes 7.0x</td>
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<td>Lotus Domino/Notes 8.0x</td>
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<tr>
<td>Lotus Domino/Notes 8.5x</td>
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Further Information

SAP CRM - Ramp-Up Knowledge Transfer (RKT)
http://service.sap.com/rkt-crm

SAP CRM – WiKi
https://wiki.wdf.sap.corp/wiki/display/PTUCRM/BST+CRM+WIKI+Home

SAP CRM - Help Portal
http://help.sap.com/crm

BPX Community
www.sdn.sap.com/irj/sdn/bpx-crm

SAP Public Web
http://www.sap.com/crm