Little-Known CRM Service & Interaction Centers Features and Functionality That Offer Big Returns

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Learning Points

- Discover useful tools, features, and customizing options you might not know existed in the SAP CRM Interaction Center.
- Learn how to use these tools to increase agent productivity and extract greater value from your SAP CRM system.

- This session is targeted primarily at individuals who already have a basic level of familiarity with the SAP CRM Interaction Center.
What We’ll Cover ...

Agent Multi-Session
CRM Instant Messenger
Agent Inbox Asynchronous Processing
Improved Agent Alerts
Clear, Cancel, Reset...
Agent Guidance: Automated Navigation, Wrap-Up List, Task-Based User Interface
Load Balancing, Heart Beat, Watch Dog
BCM Deployment Options
Wrap Up
Agent Multi-Session

As of Enhancement Package 1 for SAP CRM 7.0 (EHP1), Interaction Center agents can have up to 6 different customer interactions open in parallel.

- A single agent can work on multiple interactions (with different customers and different communication channels) in parallel. If a customer is on hold (e.g., while applying configuration changes and rebooting their device) an agent can open another session and work on an e-mail or service ticket for a different customer.

Each separate customer interaction is represented via an own tab in the agent’s screen.
Using Agent Multi-Session

Working with agent multi-session functionality

- An agent can manually open an additional session by pressing the New Session button on the communication toolbar.
- In addition, if CTI (computer telephony integration) is used, the underlying communication management software can automatically route additional items (chats, emails, business transactions, etc.) to an agent, with each additional item creating a separate new tab.
- Pressing the End button on the communication toolbar will cause an additional session to be closed and the additional tab to disappear; the original (master) tab always remains open (until the agent closes the browser or logs out).
Enabling Agent Multi-Session

Turning on the Multi-Session functionality

- To enable multi-session functionality, the flag “Multi-Session” must be checked in the communication management software profile definition in the IMG.
Configuring Agent Multi-Session

Configuring the Multi-Session functionality

- See SAP note 1597836 for how to keep the maximum number of parallel HTTP backend sessions in synch with the number of sessions in your agent’s browser. This note will help agents avoid random “timeout errors” when switching between different customer sessions.

- To reduce the number of parallel sessions an agent can open from the default (i.e., 6) to a smaller number (e.g., 3) see SAP note 1628185.

- The maximum number of multi-session-tabs per browser session of an agent is hardcoded at 6. However, the total number of HTTP(S) sessions per agent can be extended from the default (default value 6) up to 16 via the SAP application server kernel ICM parameter icm/HTTP/esid_max_ctx.
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**CRM Instant Messenger**

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BCM Deployment Options

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**CRM Instant Messenger**

As of EHP1, users can now send instant messages and collaborate internally with other SAP CRM users.

- In addition to sending instant messages, CRM users can also make telephone calls, send e-mails, and transfer CRM objects (e.g., Service Request) to other internal CRM users via instant messaging.
Capabilities of CRM Instant Messenger

CRM Instant Messenger provides standard IM capabilities... along with unique CRM only features

- Add and delete personal contacts
- Send instant messages to CRM users listed in partner functions (i.e., Employee Responsible) of CRM business transactions
- Transfer business transaction and other CRM objects between CRM users
Using CRM Instant Messenger

Using CRM Instant Messenger agents can...

- An agent can have up to 5 different instant messaging sessions open
- Every instance of an IM conversation creates an IM icon at the bottom left of the Interaction Center screen (in the broadcast messaging area). The icon looks like this: ![IM Icon].
- The IM icon blinks when a new message arrives
- The tooltip of this icon shows the last message received and also the user from whom the message is received
- Clicking on an IM icon will open the IM window
- An IM conversation is “ended” when either party closes (rather than minimizes) the window
Using CRM Instant Messenger – Context Transfer

During an IM conversation, CRM users can transfer business objects (customer records, sales orders, service requests, etc.) from one user to another.

CRM user can select (and then transfer) any recently viewed item(s) from their Recent Items. In addition, Interaction Center agents can select current items from the Activity Clipboard.
Configuring CRM Instant Messaging (1 of 3)

The following are required to use CRM Instant Messenger:

- It is necessary to activate the business function ‘CRM_PCC_CEBP’ via transaction SFWD.
- Your communication management software (CMS) product must support chat.
- Presence information must be enabled for configured CMS in the IMG transaction “Define Communication Management Software Profiles”.

![Change View "Define Communication Management Software Profiles": Overview](image)
Configuring CRM Instant Messaging (2 of 3)

The following are required to use CRM Instant Messenger

- Each CRM user must be maintained as a Business Partner with type Employee in transaction BUPA.
- The standard delivered business partner relation ‘CRMI01’ must have not been deleted. You can verify the existence of this BP relation via transaction BUBA.
The following are required to use CRM Instant Messenger:

- The “IM Enabled” flag must be enabled in your chat profile in the IMG activity, “Define Chat Profiles”
- You must enable the “Polling” flag in your polling profile in the IMG activity, “Define Context Area Profile”
Configuring Context Transfer for CRM Instant Messenger

The following are required to use the Context Transfer feature of CRM Instant Messenger

- The flag “Multicontext Transfer” must be enabled in your CRM Integration Profile in the IMG activity “Define CMS Integration Profiles”
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Wrap Up
Asynchronous Processing in the Agent Inbox provides a new leaner search, faster result, and the ability to execute searches in the background allowing agents to continue working on other tasks while a search executes.

Once a defined time limit (e.g., 3 seconds) is exceeded, the search switches over to asynchronous mode. Once the search is completed, an alert will notify the agent, the agent then clicks on the alert and is taken to the inbox and the results are displayed. Cancel button enabled in asynchronous search mode. User can cancel search.
Configuring Asynchronous Processing in the Agent Inbox

Configuration options exist to enable the lean inbox search and asynchronous search option.

<table>
<thead>
<tr>
<th>Define Inbox Profiles</th>
<th>Lean Search</th>
<th>Asynchronous</th>
<th>Interval for Result Alert</th>
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</thead>
<tbody>
<tr>
<td>AI Profile</td>
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<td>5</td>
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<td>ASYN_SRCH_LEAN</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>DEFAULT - 1</td>
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</tr>
</tbody>
</table>

In this case the previous inbox search capability using SAM would be used.

Enables the leaner search capability, performing faster than the SAM based inbox search.

Enables the asynchronous search. Allowing for the search to process in the background while the agent continues their tasks. They are notified via alert when complete.

Considered when the asynchronous option is checked, this indicates the number of seconds to wait before initiating the search in the background, thereby allowing the agent to work on other tasks.
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*Improved Agent Alerts*

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BCM Deployment Options

Wrap Up
**Improved Agent Alerts**

- **Contact Attached Data (CAD)** can now be included in alerts.
- Agents can be informed via alert if the telephone caller has any open/unprocessed emails.
- Alerts can now include formatting (bold, italic, underline) and icons!
Configuring Alerts Themes

- It is first necessary to create one or more alert themes; each theme contains a specific combination of font, color, and (optional) icon. You can later specify which theme you want to use when creating each alert in the Alert Editor tool.
- Define one or more alert themes in the IMG activity, “Define Themes for Alerts”
Creating Alerts

- After creating your alert themes, you can specify which theme to use when creating each alert in the Alert Editor tool.
  - You can access the Alert Editor tool from the IC Manager business role via menu: Process Modeling > Create: Alert
  - When creating an alert, enter the alert message and choose a theme to see a preview of what the alert will look like.

**Alert: BP_CONFIRMED**

- **Display Alert**: BP_CONFIRMED
- **General Data**:
  - **Alert ID**: BP_CONFIRMED
  - **Language**: English
  - **Description**: BP_Confirmed
- **Characteristics**:
  - **Navigation Object/Action**:
  - **Theme**: Priority Alert
- **Message**:
  - **Tooltip**:
  - **Message**: BP is now confirmed

**Theme**: combination of color and style such as bold, italic.

**Preview of the alert formatting with the selected theme.**
Using Contact Attached Data (CAD) in an Alert

- Contact attached data (CAD) entered by a customer on the phone (i.e., customer ID, order number, etc.) can be retrieved and displayed in an alert.

Agent can see the alert containing CAD attribute triggered.
When creating an alert, you can select out-of-box CAD-related Fact Base attributes such as CAD: Order Number, CAD: Call Back Description, etc.
After creating a CAD-related alert, you can trigger the alert via the Rule Modeler using Intent-Driven Interaction (IDI).
Creating Custom Contact Attached Data (CAD) Attributes

Create new CAD attribute and enable it for Fact Gathering by checking the flag.

Define CAD attribute in ERMS attribute repository.

Assigning CAD profile value to the business role.
Alert Notification for Unprocessed Inbox E-Mails

You can display an alert to inform agents if the customer on the telephone also has any unprocessed (“open” or “in process”) emails in the Agent Inbox.

- Agent receives an alert displaying number of incomplete e-mails.
- By clicking the alert, agent can be directly navigated to Inbox view showing the incomplete e-mails.
- Action when creating rule policy.

Real Experience. Real Advantage.
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Wrap Up
Clear, Cancel, Reset ...

Agents need an easy way to correct mistakes without saving bad data:

- “Clear Interaction” toolbar button (formerly “Cancel”) clears the interaction record and resets the confirmed account (business partner/contact person).
- “Cancel” application button, appearing inside business transactions like the sales order or service request, allows an agent to cancel a new (unsaved) business transaction that they have inadvertently created.
- “Reset CTI” toolbar button (formerly “Reset”) allows agents to reset the connection to the communication management software (CMS) without having to log off from IC.

See SAP note 1339970 for more details on the “Clear Interaction” and “Reset CTI” buttons.
Application “Cancel” Button

- The application “Cancel” button was introduced in CRM 2006s and allows an agent to cancel a newly created business transaction (Sales Order, Service Request, etc.) that the agent has inadvertently created but not yet saved.
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BCM Deployment Options
Wrap Up
Wrap-Up List can be used to notify agents of relevant product proposals, incomplete orders, missing data, etc.

- With the Intent-Driven Interaction, it is possible to use Rule Modeler to add products, objects, or incomplete orders to the Wrap-Up List.
- Wrap-Up List items can be flagged as mandatory. Items can also be flagged as \textit{Customer Required Online} indicating that the agent should process the item while the customer is still on the telephone or chat session.
Automated Navigation

Using the Intent-Driven Interaction (IDI) you can create business rules to automatically navigate agents to particularly CRM screens or business transactions based on events (such as the clicking of a specific button) and/or data (i.e., customer has an expiring service contract)
**Task-Based User Interface (UI)**

- Task-based UI provides “guided procedures” that navigate IC agents through the necessary steps to complete a business tasks such as creating a service ticket.
- Agents are not always certain of the exact next step (or sequence of steps) when handling a complex or unfamiliar business process.
- Guided procedures provide increased reliability and productivity and results in greater compliance with corporate contact center practices.

*Caution: SAP delivers a sample guided procedure for Product Support scenario, but you will mostly likely need to create your own custom guided procedures (with some development effort).*
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Wrap Up
Load Balancing

- SAP CRM can be connected to external Communication Management Software (CMS) systems which take care of CTI (telephony, email, fax, chat, ...). Many of these systems have limits with regards to how many users (i.e., 500) can log on to a single CMS instance. Thus it is necessary to connect multiple CMS instances to one CRM system.
- In such cases 3rd party load balancers can be used to handle the message traffic between the SAP CRM interaction center and the CMS system: The 3rd party load balancers assure that:
  - Logon sessions are (evenly) distributed across the CMS instances.
  - Subsequent message from agents are always sent to the right CMS instance
- SAP supports this 3rd party load balancing by providing session and user information in ICI SOAP messages directly in the HTTP header.

See SAP note 1640673 for details on how to use third-party load balancers
IC1 Heartbeat and Watchdog Check

For every browser session of an IC agent there are two sessions on the CRM server: the communication session and the agent session. The **communication session** hosts communication functions such as telephony, and the **agent session** hosts generic functions such as account identification and the navigation bar.

The Heartbeat and Watchdog checks allow you to check for continued communication between the communication session, the communication management software (CMS), and the Web browser.

- Goal is to detect if the agent browser session is still available for a new incoming CMS event (i.e., phone call, email, Web chat)

See **note 1595224** on additional field to be filled by CMS to use the Watchdog in combination with Load Balancing.
Enter the time interval at which you want the watchdog to come out of its dormant state to check the timestamps of the browser pings and/or the CMS pings in the shared memory.

Enter the maximum ping delay you want to allow between the last browser ping and the current watchdog wake up time.

Enter the maximum ping delay you want to allow between the last browser ping and the current incoming CMS event.

Enter the time interval between the pings from the Web browser session to the communication session to check for availability of the browser session.

Enter the time between the two pings to the CMS session to check for the CMS availability.

If you don't select this checkbox, the CMS-event-triggered timestamp comparison (heartbeat without watchdog) is used by default.
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### SAP Business Communications Management Software

**Key Solution Capabilities**

<table>
<thead>
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<th>Inbound Contact Center</th>
<th>Outbound Contact Center</th>
<th>Expert and Mobile Users</th>
<th>Automated Services (IVR)</th>
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</thead>
<tbody>
<tr>
<td><strong>Solution Capabilities</strong></td>
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<tr>
<td>Inbound Contact Center</td>
<td><strong>Voice over IP Telephony Services</strong></td>
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<tr>
<td>Outbound Contact Center</td>
<td><strong>Unified Multi-Channel Contact Routing</strong></td>
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<td><strong>Voicemail and Messaging Services</strong></td>
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<td>Automated Services (IVR)</td>
<td><strong>Presence and Directory Services</strong></td>
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<tr>
<td><strong>Corporate communication services</strong></td>
<td><strong>Call Recording and Contact History Services</strong></td>
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<td><strong>Online Monitoring, Reporting and Analysis Tools</strong></td>
<td><strong>Consolidated Administration, Management, and Control</strong></td>
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<tr>
<td><strong>Softphone, IP Deskphone and Mobile Clients</strong></td>
<td><strong>Deep SAP Business Context Integration thru Open Interfaces</strong></td>
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</table>
What is a “managed appliance”?

Pre-packaged Hardware and Software
- Implemented using best practices.
- Approved hardware configurations.

Drop it in, Light it up
- Minimal on-site configuration.

Application Managed Services
- Remote monitoring with service levels.
- Pro-active assessment and application of hotfixes and upgrades.

What are some of the benefits?

Reduced Implementation Time
- Cookie-cutter approach.
- Assembly-line vs. one-offs.

Improved Consistency and Reliability
- Fewer differences between implementations.
- Less opportunity for errors and incompatibilities.
- Reuse proven methods.

24x7 Peace of Mind
- Application Managed Services ensures your BCM system receives pro-active care.
- Trusted vendor keeps up-to-date on technology and advises of upcoming product advances.

Real Experience. Real Advantage.
Enable A Modern Workforce
- At-home Agents
- Flexibility to move or provision new sites with ease
- Enable geographically disbursed workforce

Inherent Platform Capabilities
- Instant access to cost-prohibitive redundancy and scalability
- Built-in security
- Highly skilled expertise in hosting, networking, voice over IP / call centers

Achieve Remarkable Results
- Use contact center as a strategic asset for creating customer value
- Maximize contact center performance
- Avoid unnecessary investments
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Return on Investment

- One quick win for increasing your ROI is to integrate your CTI system with SAP CRM Interaction Center if you haven’t done so already. You can easily calculate ROI if you know the following:
  - Average amount of time users spend manually searching for customer records
  - Average number of calls
  - Average number of agents
  - Average agent salary
- After you calculate the yearly ‘costs’ of having agents manually search for and confirm customers, you can compare it against the typically costs of a CTI integration project to determine the payback period and ROI.
Key Learnings

- As of EHP1 for SAP CRM 7.0, Interaction Center agents can have up to 6 different customer interactions open in parallel.
- Agents can send instant messages, transfer business objects, and collaborate with other SAP CRM users.
- Agent Inbox asynchronous processing provides lean search, faster results, and ability to execute background searches.
- Agent alerts can now be formatted, can include CAD data, and can notify agents if a telephone caller has open emails.
- SAP BCM is available in a variety of deployment options including on-premise, managed appliance (BCM-in-a-Box) and SaaS (BCM-in-a-Cloud) via a third-party SAP partner.
Additional Resources

  - Alert for Open / In-Process Emails in SAP Enhancement Package 1 for CRM 7.0
  - SAP CRM 7.0 EhP1: Contact Attached Data available for Alert and Rule Modeler
  - SAP CRM 7.0 EhP1: Alert and Broadcast Message Formatting
  - How to configure New Search in CRM7.01 Agent Inbox
  - List of all IC-related blogs, articles, and whitepapers
  - IC question & answer forum – ask the experts any question if you get stuck
Thank you for participating.

Please remember to complete and return your evaluation form following this session.

For ongoing education on this area of focus, visit the Year-Round Community page at www.asug.com/yr

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