



Abridged Functional/Technical Specification

NOVELL

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**Resolves Defect # 595384**

Web UI Configuration in Web UI to make the field “Chance of Success” Display only for all Business Roles

“Chance of Success” is a field dependant on the Sales Stage chosen on the opportunity. So, by default this is a display only for most of the user roles. The user roles, ZPCADMIN (Channel Partner Admin User) and ZPAREXE (Partner Executive) are the only 2 user groups to override this field, the development will remove their authorization to override and will be made “Display only” for all Roles.

The field label is: Chance of Success, UI Component: BT111H\_OPPT, Context Node: BTOPPORTH, View: BT111H\_OPPT/Details, Role Keys: All, Business Roles: ALL, Field Attribute: PROBABILITY

The screenshot shows the SAP Opportunity Details form. The 'Sales Cycle' section is highlighted, and a red arrow points to the 'Chance of Success' field, which is set to 10%. The 'Calculated Chance' is 0%. The 'Status' is 'In process' and the 'Reason' is empty. The 'Classification' section is also visible at the bottom.

General Data		Dates	
Type	Sales Opportunity	Start Date	07/29/2009
ID	54	Closing Date*	07/31/2009
Description*	Test206	<b>Sales Cycle</b>	
Prospect*	ABC INC	field "Display Only" Sales Stage	Identification and Alignm
Prospect Address	179 Hawthorne Ave / Central Islip NY 11722-5104	Chance of Success	10 %
Main Contact	Rhonda Fields	Calculated Chance	0 %
Employee Responsible	David Anderson	Status	In process
<b>Forecast</b>		Reason	
Expected Total Value	0.00 USD	<b>Classification</b>	

**Resolves Defect # 595382**

A modification to Nightly Batch Job Which closes the related non-mandatory activities for a Sales Stage Whenever is progressed.

**Current Logic**

1. Each sales stage will have mandatory and supporting tasks that are to be performed during the life cycle of the opportunity.
2. Each sales stage will have one mandatory task and several supporting tasks. The Sales Employee or the Channel Partner must complete the mandatory task offline and then update the Opportunity record by “closing” the task. This action (i.e. closing the mandatory task) will trigger the system to automatically move the opportunity into the next sales stage.

**New Enhancement Request**

When moved to the next stage in the opportunity the system must look for all the Non-Mandatory activities/ Supporting Activities and close out their status to “completed”. Currently there is a Batch program in place which is not working as intended and is intended to close out all the non-mandatory activities upon a change in Opportunity status to “Lost” or “Won”.

The proposal for this development will be to modify the current enhancement on “progressing Sales Stage”. The sales stage is progressed based on completion of the Mandatory Activities, triggered by a system event implemented using the Object: Component: BT111H\_OPPT, Enhancement Set: ZNOVELL, Class: ZL\_BT111H\_O\_DETAILS\_IMPL, Method: SALES\_STAGE\_PROCESS

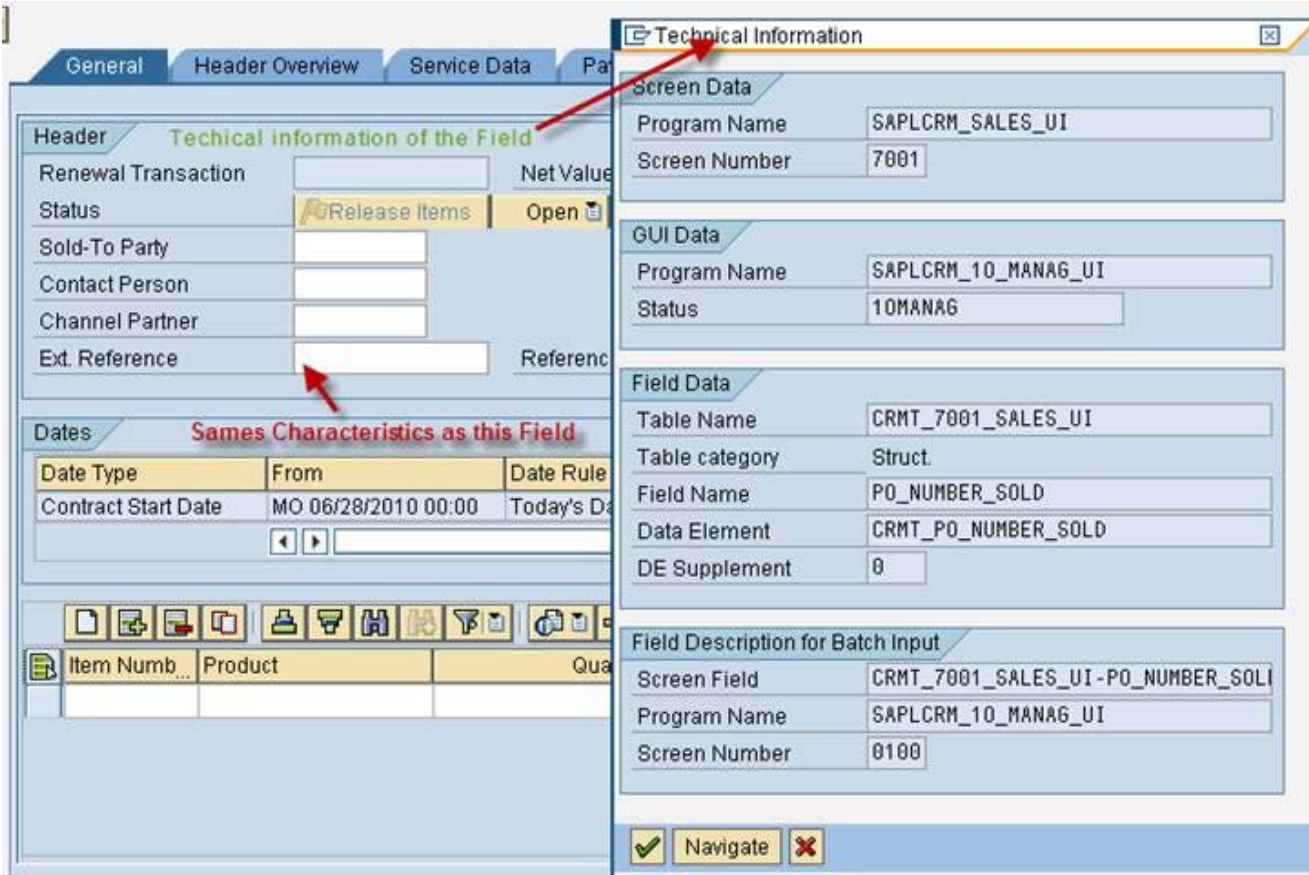
The additional logic will simply close out the non-mandatory activities, which are in Document flow/ or which are triggered through action profile or manually created and associated with the Previous Sales Stage

**Resolves Defect # 609694**

Development Changes on Opportunity type ZOP2

- A. Add field to ZOP2 to capture the Service Contract Number & Enable the field for Screen in Web UI and also the BI extraction
  - a. Add a Field Using EEWB, Enable the field for Web-UI in the opportunity Header UI Component: BT111H\_OPPT, Context Node: BTOPPORTH, View: BT111H\_OPPT/Details – **Refer to Screen Shot 1 for Field characteristics**
- B. Add the newly created SC# as a option with Boolean variants as “is”, “is not” and a Blank Variants
  - a. Add this field as part of the Search Variants in the Opportunity Search Screen, and the Search must give “is”, “is not” and a Blank as the options for Search Criteria
  - b. Add the newly created SC# as a column on the Search Results
- C. Make changes to the BI Reporting and extraction protocols to exclude the Opportunities with value in SC#
  - a. BI when extracting data for any opportunity dependant forecast and reporting must exclude the opportunities when a value is filled in the newly developed field “Service Contract Number”
- D. Update the Security Authorization to provide Create/ Write access to ZOP2 Transaction type
  - a. Provide Edit Access to ZTWRENREP (TW Renewal Rep) users on ZOP2 Transaction

Screen Shot 1



**DETAIL PROCESSING LOGIC**

ID	Description
594575	Need to restrict visibility for Franchises, When we mean assigned to them Only, that means assigned to the Franchisee as a organization. Franchisee Reps must see only the Leads which are assigned to their Franchisee and no other Opportunities.
595381	Planned activity - move from sales stage 03 to sales stage 04 - move the non-mandatory task "Create and deliver draft proposal to Power Sponsor" from sales stage 3 to sales stage 4
595382	CR75 Remove non-mandatory sales tasks for Opportunities – Batch job is not updating the Open documents as it is designed
595383	Ability to leverage sub-opportunities – Configuration/ Demo to enable the Sub Opportunities
595384	Opportunity - Field Chance of Success editable for some users – Currently This can be done by the role ZPAREXE – must be Display only for all users in the system
596139	Market One Users have visibility to all Novell Opportunities – This Defect will be resolved via the Defect # 595356 in Leads Management
609692	Regress an opportunity to a previous Sales Stage
609694	Dealer Registration Vs. Academic SAP Renewal Opportunities. 1) Add SC# field in SAP CRM for type Dealer Registration Opportunity type ZOP2 2) Add field value SC# to the Search criteria options for Opportunities with function 'is', 'is not' and 'empty' 3) BI Reporting - any Dealer Registration Opportunity type opportunity with a value in field SC# to be excluded from reporting - (section Opportunity and Pipeline)

4) This change will also require a security matrix update for TW Renewal Reps to have Change rights to ZOP2.

**Web UI Configuration in Web UI to make the field “Chance of Success” Display only for all Business Roles**

**PROGRAM ATTRIBUTES**

Component	BT111H_OPPT
View	Details
Class	ZL_BT111H_O_DETAILS_CN01
Method	GET_I_PROBABILITY

Logic:

- Set parameter RV\_DISABLED to “TRUE”.

**Close out all open activities when sales stage moves to next level**

This requirement will be fulfilled with action management. Actions will be configured that will execute immediately when the sales stage is advanced. Execution of this action is with higher priority than the actions that create activities. (immediate execution because the creation of activities based on a new sales stage is executed immediately)

**PROGRAM ATTRIBUTES**

Definition Name	EXEC_METHODCALL_PPF
Implementation	Z_CLOSE_ACTIVITIES

Logic:

- Read docflow for current opportunity via function CRM\_DOC\_FLOW\_READ\_OB
- Get process type configuration
- Skip process type ‘ZNSG’
- Update activity status via CRM\_ORDER\_MAINTAIN.
  - User status = E0003
  - Get Status Profile via process type configuration (field USER\_STATUS\_PROC)
- Register for save

Customizing:

Action Profile

- ZNOVELL\_OPPORTUNITY\_SALES\_ASST

Implementation

- Z\_CLOSE\_ACTIVITIES

Actions:

- ZNOVCNMASS1: STAGE 01      Close all Non Mandatory Action for Sales Stage 1
- ZNOVCNMASS1: STAGE 02      Close all Non Mandatory Action for Sales Stage 2
- ZNOVCNMASS1: STAGE 03      Close all Non Mandatory Action for Sales Stage 3
- ZNOVCNMASS1: STAGE 04      Close all Non Mandatory Action for Sales Stage 4
- ZNOVCNMASS1: STAGE 05      Close all Non Mandatory Action for Sales Stage 5

```

METHOD if_ex_exec_methodcall_ppf~execute.
*/-----/
* Action to set status 'Complete' (E0003) on all open activities
* for the current opportunity. Do not process ZNSG' (Strategic Task)
* activities
*/-----/
* Pieter Wildschut                    06/29/2010                    initial version
*/-----/
* Changes:
*-----/
INCLUDE crm_direct.
DATA: lc_action_execute            TYPE REF TO cl_action_execute.
DATA: lv_guid_ref                  TYPE crmt_object_guid,
      lv_actionname                TYPE ppfdtt,
      lv_actiontext                TYPE ppfdttt,
      lv_retcode_ppf                TYPE sy-subrc.
DATA: lv_msg                        TYPE string.
DATA: lt_doc_flow_wrk              TYPE crmt_doc_flow_wrkt.
DATA: ls_doc_flow_wrk              TYPE crmt_doc_flow_wrk.
DATA: ls_proc_type                 TYPE crmc_proc_type.
DATA: lv_process_type              TYPE crmt_process_type.
DATA: lv_act_guid                  TYPE crmt_object_guid.
DATA: it_status                    TYPE crmt_status_comt.
DATA: lt_input_field_names        TYPE crmt_input_field_names_tab,
      ls_input_field_names        TYPE crmt_input_field_names,
      lt_status_com                TYPE crmt_status_comt,
      ls_status_com                TYPE crmt_status_com.
DATA: lt_input_fields              TYPE crmt_input_field_tab.
DATA: ls_input_fields              TYPE crmt_input_field.
DATA: lv_dummy.

*
** CONCATENATE sy-uname 'for action execution' INTO lv_msg.
**
** CALL FUNCTION 'RSLG_WRITE_SYSLOG_ENTRY'
** EXPORTING
**     sl_message_area = 'CM'
**     sl_message_subid = '0'
**     pre_param_long = lv_msg.
*
** Check if logged on with Business Role of External Partner
* CONSTANTS: c_external_partner    TYPE string VALUE 'ZNOV_CHM-PRT'. "#EC NOTEXT
* DATA     : lv_business_role     TYPE crmt_ui_profile.
*
* lv_business_role = zcl_utils=>get_business_role( ).
*
CREATE OBJECT lc_action_execute.

*****
* get parameter from reference object
CALL METHOD lc_action_execute->get_ref_object
EXPORTING
   io_appl_object = io_appl_object
   ip_action      = ip_action

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        ip_preview      = ip_preview
        ii_container    = ii_container
IMPORTING
        ev_guid_ref     = lv_guid_ref
        ev_actionname   = lv_actionname
        ev_actiontext   = lv_actiontext.

*****
**/get sales stage
*  DATA: ls_opport_h_wrk TYPE  crmt_opport_h_wrk.
*  CALL FUNCTION 'CRM_OPPORT_H_READ_OW'
*    EXPORTING
*      iv_opport_h_guid      = lv_guid_ref
**    IV_REF_GUID           =
*    IMPORTING
*      es_opport_h_wrk      = ls_opport_h_wrk
**    EV_GUID              =
**    EV_MODE              =
*    EXCEPTIONS
*      opport_header_not_found = 1
*      OTHERS                 = 2
*
*  IF sy-subrc <> 0.
**  MESSAGE ID SY-MSGID TYPE SY-MSGTY NUMBER SY-MSGNO
**    WITH SY-MSGV1 SY-MSGV2 SY-MSGV3 SY-MSGV4.
*ENDIF.

*/read document flow
REFRESH lt_doc_flow_wrk.
CALL FUNCTION 'CRM_DOC_FLOW_READ_OB'
  EXPORTING
    iv_header_guid = lv_guid_ref
  IMPORTING
    et_doc_flow_wrk = lt_doc_flow_wrk.

* loop over all tasks ans set complete statuys
LOOP AT lt_doc_flow_wrk INTO ls_doc_flow_wrk
  WHERE objtype_b = gc_object_type-task.
  lv_act_guid = ls_doc_flow_wrk-objkey_b.

  CALL FUNCTION 'CRM_ORDERADM_H_READ_OW'
    EXPORTING
      iv_orderadm_h_guid      = lv_act_guid
    IMPORTING
      ev_process_type        = lv_process_type
    EXCEPTIONS
      admin_header_not_found = 1
      OTHERS                 = 2.
  IF sy-subrc <> 0.
    MESSAGE ID sy-msgid TYPE sy-msgty NUMBER sy-msgno
      WITH sy-msgv1 sy-msgv2 sy-msgv3 sy-msgv4 INTO lv_dummy .
*  write message into ppf-log
  CALL METHOD cl_log_ppf=>add_message
    EXPORTING
      ip_problemclass = '2'
      ip_handle       = ip_application_log.
*  set return status
  rp_status = '2'.
  EXIT.
ENDIF.

* do nor process Strategic Task
CHECK lv_process_type NE 'ZNSG'. " Strategic Task

```

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*/ get process type customizing
CALL FUNCTION 'CRM_ORDER_PROC_TYPE_SELECT_CB'
  EXPORTING
    iv_process_type      = lv_process_type
  IMPORTING
    es_proc_type        = ls_proc_type
  EXCEPTIONS
    entry_not_found     = 1
    text_entry_not_found = 2
    OTHERS               = 3.
IF sy-subrc <> 0.
  MESSAGE ID sy-msgid TYPE sy-msgty NUMBER sy-msgno
    WITH sy-msgv1 sy-msgv2 sy-msgv3 sy-msgv4 INTO lv_dummy.
* write message into ppf-log
CALL METHOD cl_log_ppf=>add_message
  EXPORTING
    ip_problemclass = '2'
    ip_handle       = ip_application_log.
* set return status
  rp_status = '2'.
  EXIT.

ENDIF.

REFRESH lt_status_com.
REFRESH lt_input_field_names.

ls_status_com-ref_guid = lv_act_guid.
ls_status_com-ref_kind = gc_object_kind-orderadm_h .
ls_status_com-user_stat_proc = ls_proc_type-user_stat_proc.
ls_status_com-status = 'E0003' .
ls_status_com-activate = true .
INSERT ls_status_com INTO TABLE lt_status_com .

ls_input_field_names = 'ACTIVATE'.
INSERT ls_input_field_names INTO TABLE lt_input_field_names.

ls_input_fields-ref_guid      = lv_act_guid.
ls_input_fields-ref_kind      = gc_object_kind-orderadm_h.
ls_input_fields-objectname    = gc_object_name-status.
ls_input_fields-field_names = lt_input_field_names.

INSERT ls_input_fields INTO TABLE lt_input_fields .

CALL FUNCTION 'CRM_ORDER_MAINTAIN'
  EXPORTING
    it_status      = lt_status_com
  CHANGING
    ct_input_fields = lt_input_fields
  EXCEPTIONS
    error_occurred = 1
    document_locked = 2
    no_change_allowed = 3
    no_authority = 4
    OTHERS = 5.
IF sy-subrc NE 0.
* write message into ppf-log
CALL METHOD cl_log_ppf=>add_message
  EXPORTING
    ip_problemclass = '2'
    ip_handle       = ip_application_log.
* set return status
  rp_status = '2'.
  EXIT.
ENDIF.

```

```

CALL METHOD register_for_save
EXPORTING
  iv_source_header_guid      = lv_guid_ref
  iv_additional_header_guid  = lv_act_guid
  ii_container               = ii_container
  ip_application_log         = ip_application_log
IMPORTING
  rp_status                  = rp_status.

ENDLOOP.

ENDMETHOD.

```

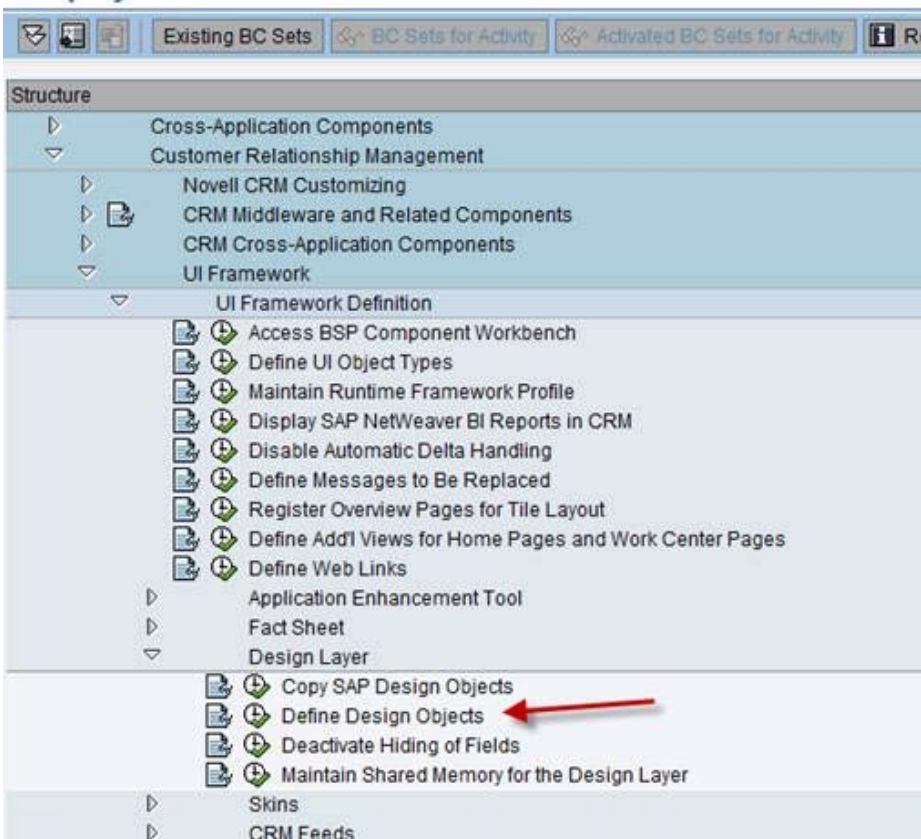
-

### New field to capture Service Contract Number.

Perform next steps to fulfill above requirement

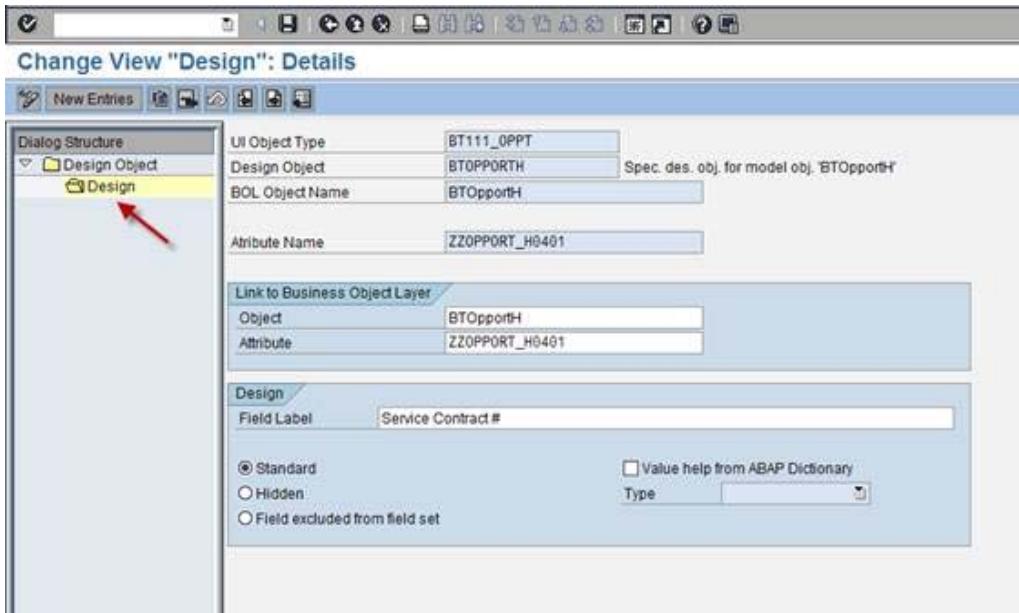
- Add field 'Service Contract #' (CHAR 35) to Opportunity header via EEWB (see project: **ZOPPTY\_SRV\_CTRNO** )
- Add the new EEWB field to the design layer

#### Display IMG





To make the field available for the opportunity screen configuration, add next entry to Design (CRM > UI Framework > UI Framework Definition > Design Layer > Define Design Objects)

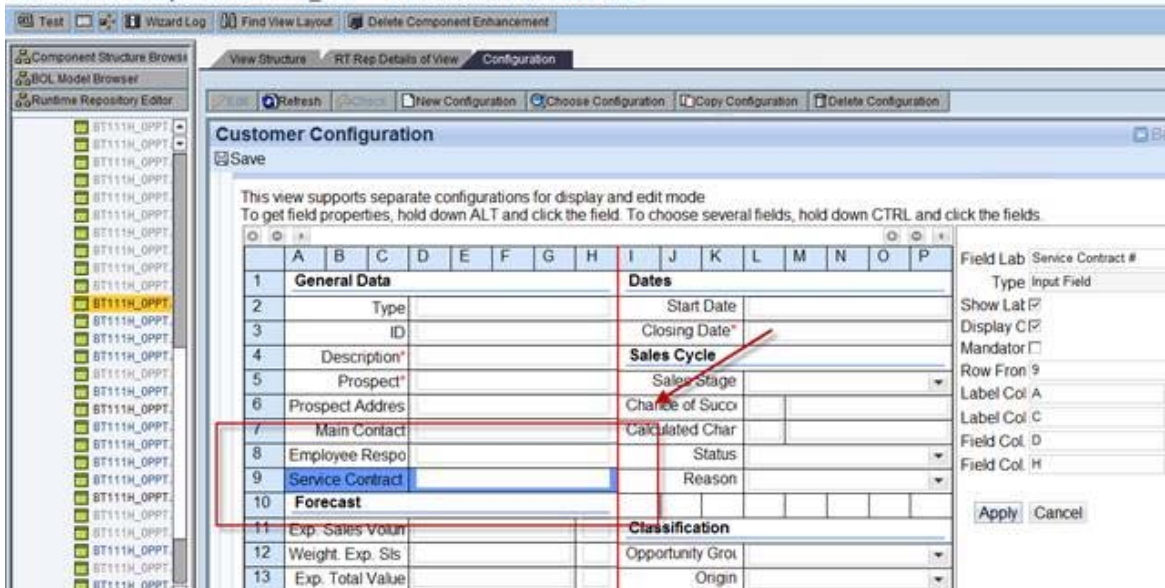


- Add new field to next configurations of view BT111H\_OPPT/Details

Role Key	Object Type	Component Usage	Subtype	Display Only
ZNOV_CHMGR	BT111_OPPT	CUBTOpptOverview	ZOP2	
<DEFAULT>	BT111_OPPT	<DEFAULT>	ZOP2	X
Z_SLS_EMP	BT111_OPPT	<DEFAULT>	ZOP2	X
Z_SLS_EMP	BT111_OPPT	CUBTOpptOverview	ZOP2	X

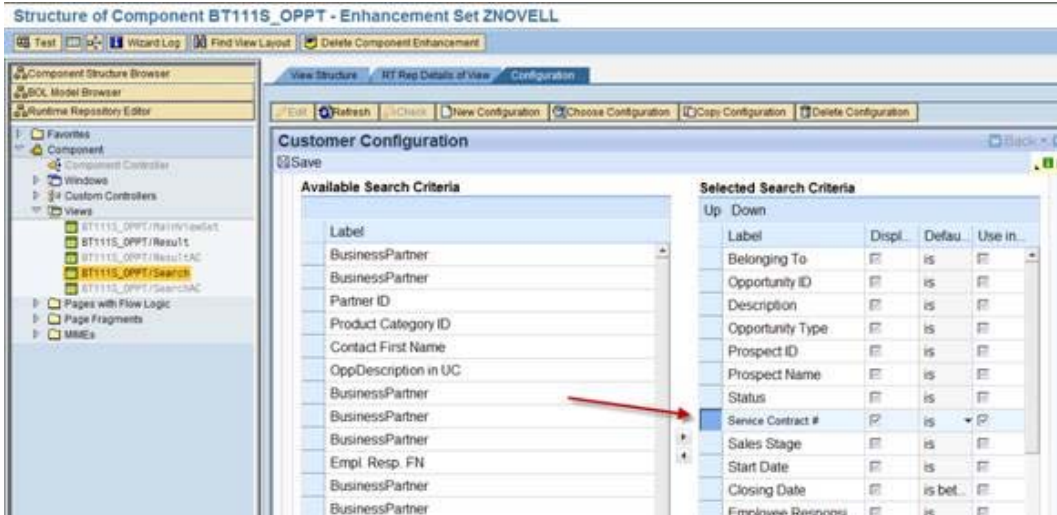
In all cases: Add the new field above FORCAST label

Structure of Component BT111H\_OPPT - Enhancement Set ZNOVELL

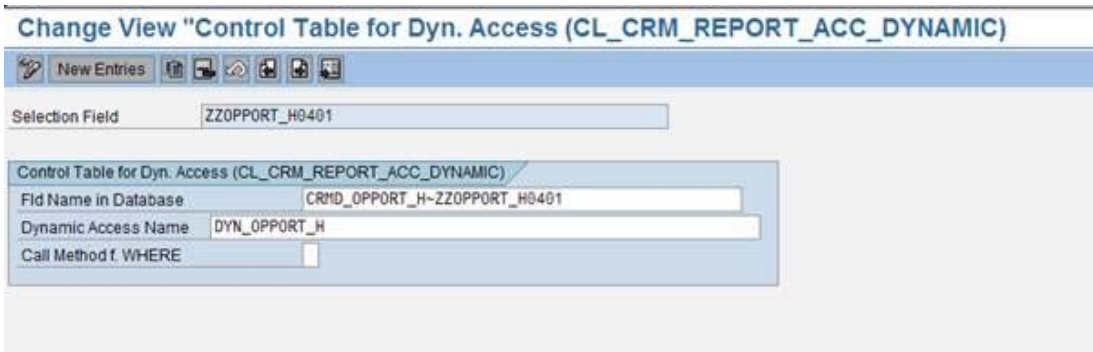


Allow new field as Opportunity search field; Add this new field to next configurations of view BT111S\_OPPT/Search

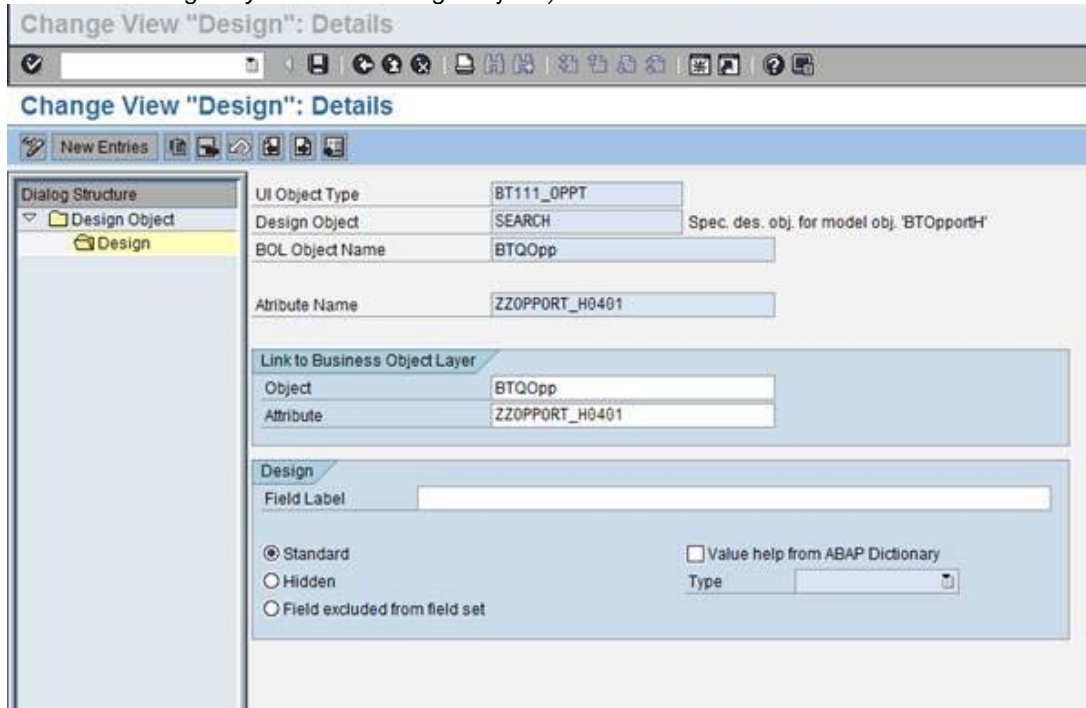
Role Key	Object Type	Component Usage	Subtype	Display Only
ZNOV_CHMGR	<DEFAULT>	CUBTOpptSearch	<DEFAULT>	
Z_SLS_EMP	<DEFAULT>	CUBTOpptSearch	<DEFAULT>	X



- Add the new field to table 'Control Table for Dyn. Access (CL\_CRM\_REPORT\_ACC\_DYNAMIC)'; SM31 CRMC\_REPDY

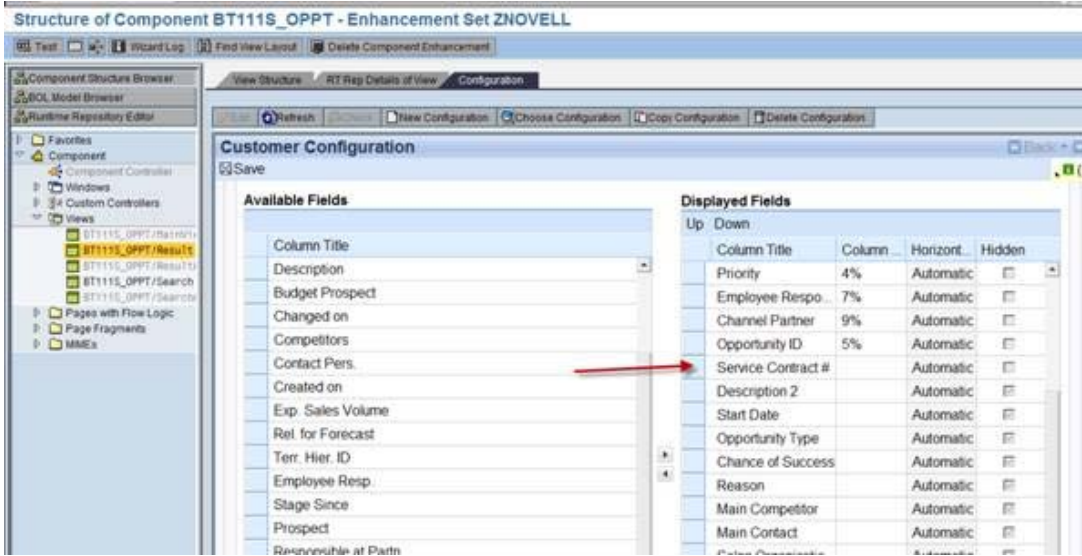


To make the field available for the search fields list, add next entry to Design (CRM > UI Framework > UI Framework Definition > Design Layer > Define Design Objects)



- Allow new field as Opportunity search field; Add this new field to next configurations of view BT111S\_OPPT/Result

Role Key	Object Type	Component Usage	Subtype	Display Only
ZNOV_CHMGR	<DEFAULT>	CUBTOpptSearch	<DEFAULT>	
Z_SLS_EMP	<DEFAULT>	CUBTOpptSearch	<DEFAULT>	X



To make the field available for the result list, add next entry to Design (CRM > UI Framework > UI Framework Definition > Design Layer > Define Design Objects)

