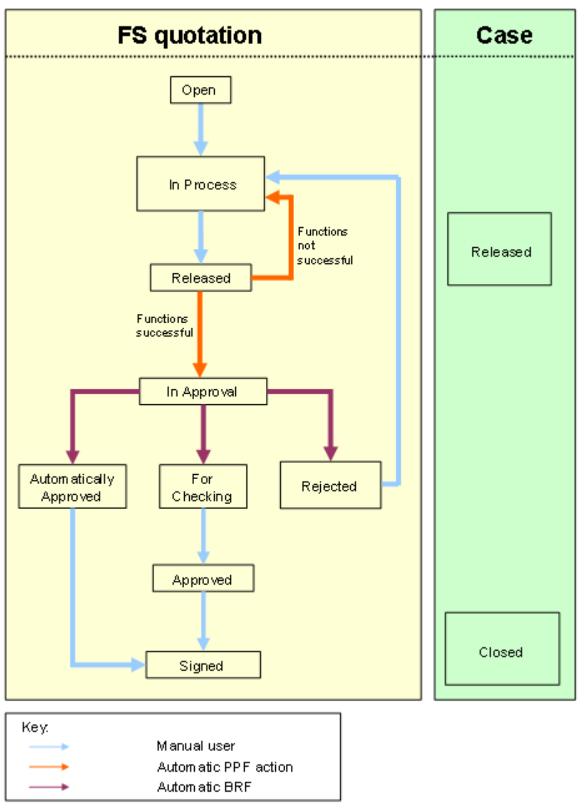
Quotation Tracker

Context

In the ETO (Engineering to Order) and CTO (Configure to Order) businesses, every RFQ (Request for Quote) is unique. In addition, since most businesses allow different levels of customizing to their final products, their quotation process is also unique. Transactional systems try to collect information from all parties involved, like sales, marketing, engineering, finance, manufacturing, and purchasing, which makes is confusing for all end users.

The existing SAP Fiori apps “My Quotation Pipeline”, “My Quotations”, and “Sales Quotation” focus on the relationship between the Sales Person and the Customer, either during the Quotation creation time (My Quotations) or during the follow-up process (My Quotation Pipeline). There is currently, and to my knowledge, no SAP Fiori app tracking the internal quotation build-up process, which is critical for the custom quotations used in the ETO and CTO industries.



Example of Quotation Process Flow
Source: help.sap.com

Persona

Background

John is a ***quotation manager*** at Custom Mechanics in Milwaukee. He is 50 years old, the last 25 of which he spent within the company at many technical levels, from support to engineering, and project management. On week-ends, he likes to work on his old motorcycle and take it for a ride … when it works.

Job Responsibilities

In his current position, John needs to:

- receive requests for quotation from customer account managers, who collect the requirements and a target cost;
- ensure that engineers complete their designs or validate the customer provided ones;
- transfer the Bill of Material and Routing to the Finance department, for the calculation of overheads;
- if necessary, work with purchasing for the pricing of new parts;

Main Goals

John's goals are to:

- Ensure that the completed RFQ is technically valid and financially within the targets,
- Follow-up with all parties so that the process is completed within 1 week.

Needs

In order to complete his job, John needs:

- access to information from multiple systems (CRM, ERP, SRM, CAD, etc.);
- frequent status check and communication with account managers, engineers, finance and purchasing.

Pain Points

In his current position, John struggles with:

- tracking information in multiple systems, in different formats, with different references;
- time wasted in searching for information and sharing files through emails;
- spending time on week-ends, working in Excel to identify new parts or missing costs.

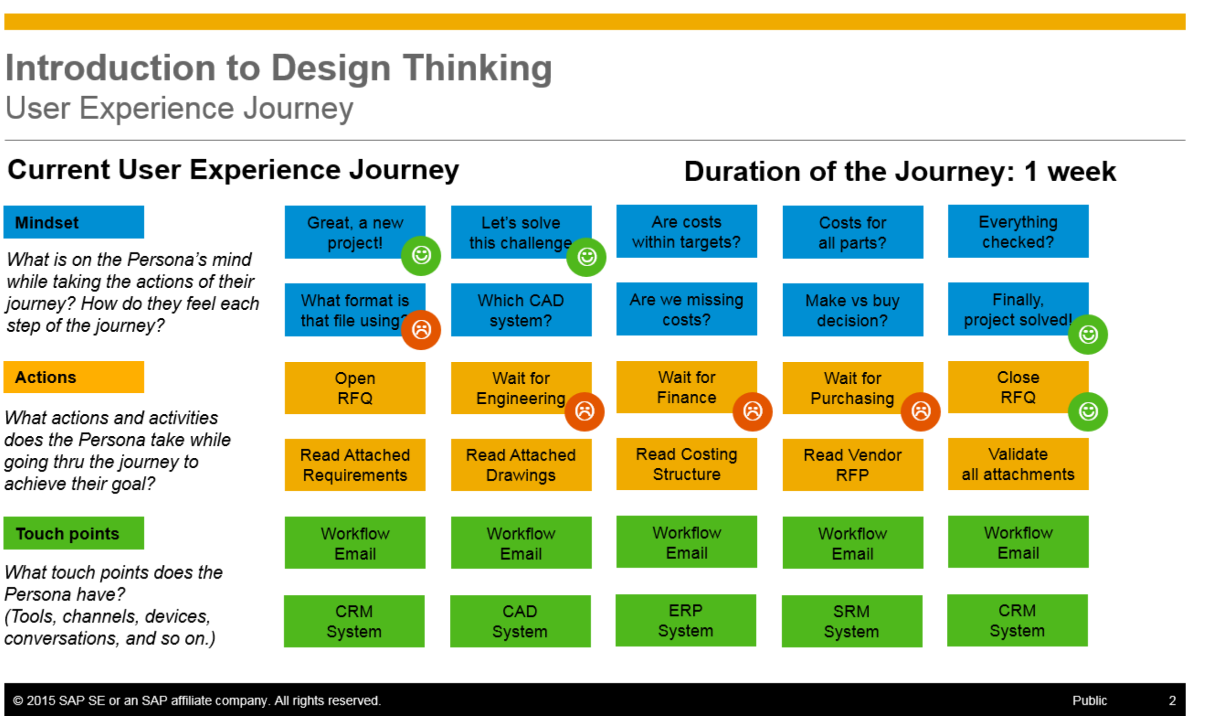
Stakeholders

- Account Management / Sales
- Engineering / Manufacturing
- Finance
- Purchasing
- Client

Competencies

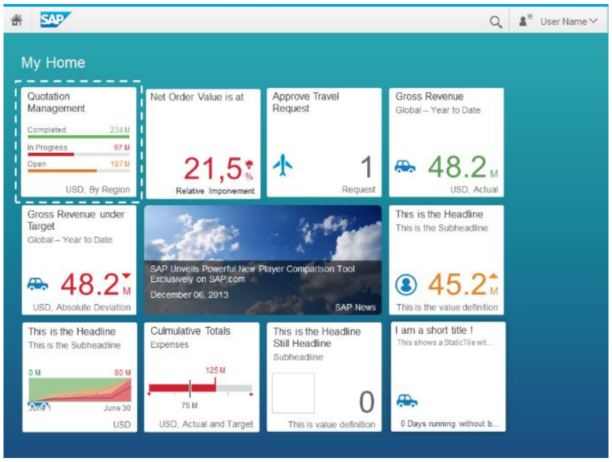
Casual User				X		Power User
Proactive					X	Reactive
Work in Team		X				Lone Fighter
Global Focus					X	Local Focus
Innovative					X	Conservative

Experience Journey

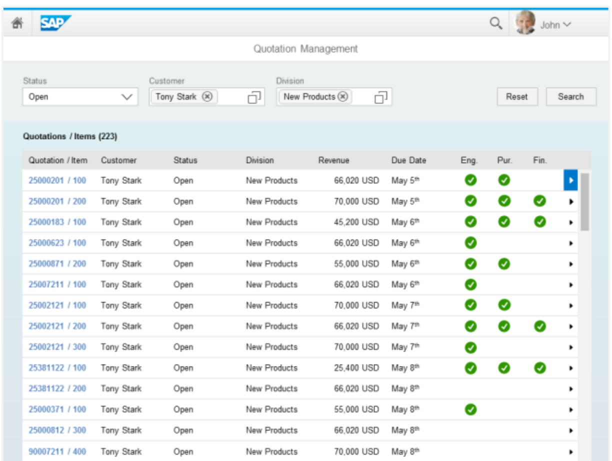


Mock Up

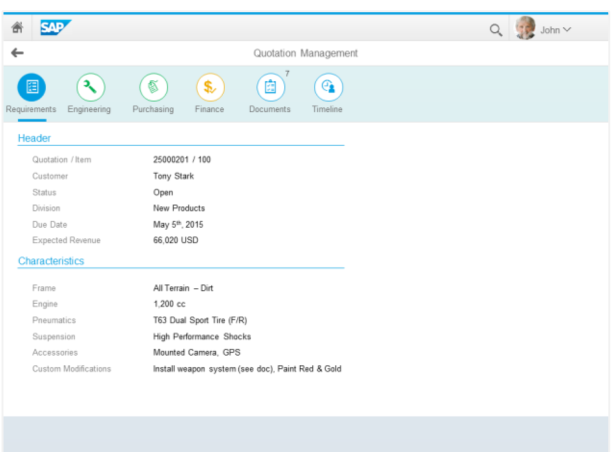
Quotation Management



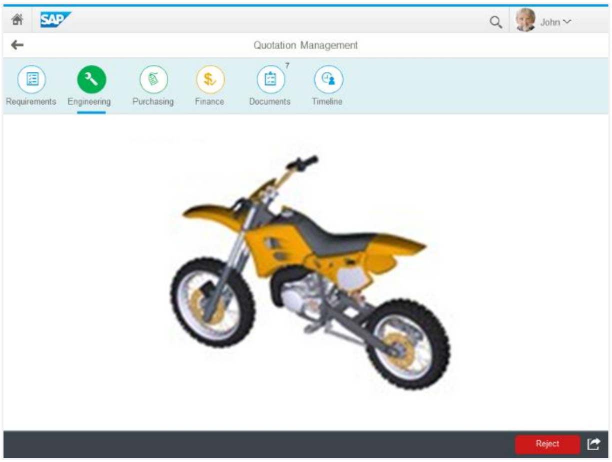
On the Launchpad, a tile for Quotation Management will show a summary of the quotes by status.



In this filtered list report, John will be able to quickly identify the Quotations that need his attention. It could be filtered by Status (Open, Closed, Canceled), Customer ID, and / or Division. The Revenue and Due Date columns would also help prioritize his work. The last 3 columns (Eng, Fin, and Pur) will also enable John to logically group interactions with the other departments.



The requirements tab shows the header information already seen in the list. The characteristics are taken from the characteristics and values configured in the variant configurator. Notice that the Engineering and Purchasing steps are already approved (green), but the Finance one isn't yet.

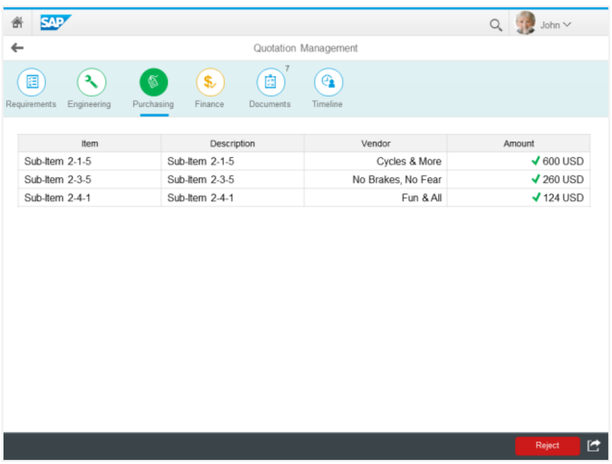


On the Engineering tab, the CAD drawing is rendered using SAP Visual Enterprise Viewer.

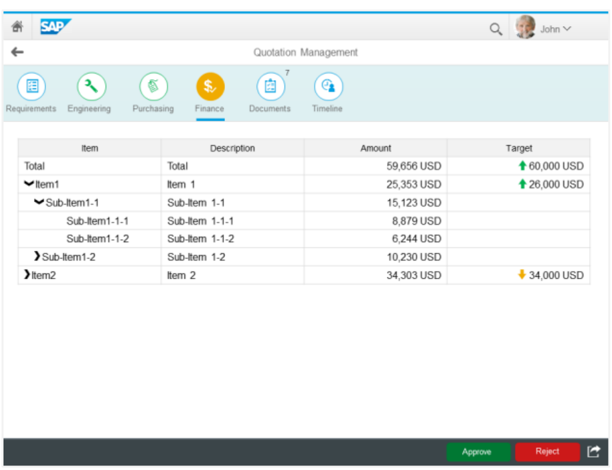
https://www.youtube.com/watch?v=cK9FUJeeSuw

Notice that despite the fact that this step has already been approved, John can still Reject it in case new information shows up.

John can also share this view via email.

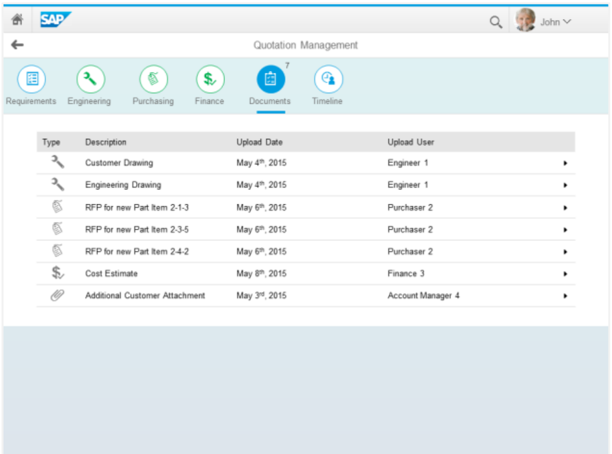


On this Purchasing tab, John validates that all the new parts needed for this project have been quoted by a vendor.



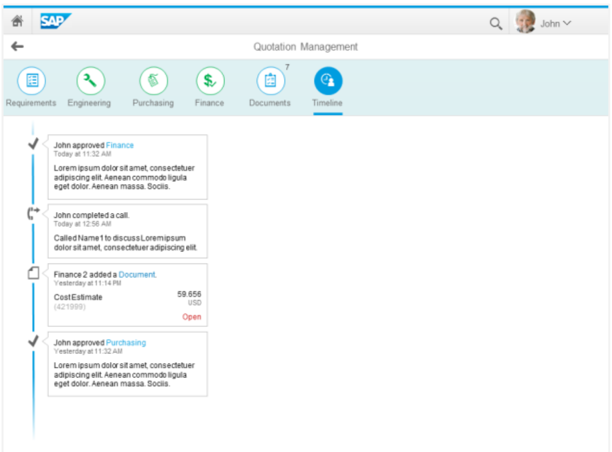
Once the drawing has been completed and all parts have a price, the Finance team can perform a cost estimate.

John notices that one item exceeds the targets, but since overall the final product is within the target costs, he decides to approve the Finance step.



For easier access, all Documents are grouped under a single tab and clearly identified by their icon.

Most of the time, these are only links to a Document Management System (DMS).

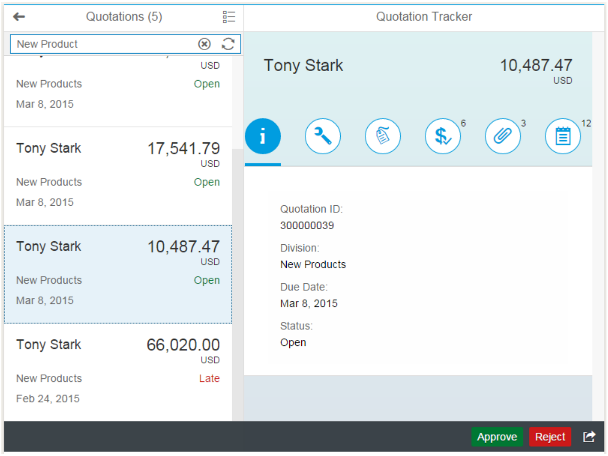


Tracking a Quotation is a team sport. On the Timeline tab, all users will be able to easily identify who completed which step, including offline activities like phone calls.

Notice that John confirmed the Purchasing step the previous day. Today, after Finance has uploaded their Cost Estimate, he was able to review it over the phone before confirming it.

John has now completed his task much faster thanks to the SAP Fiori Quotation Tracker App. And since it's Friday afternoon, he's more than happy leave early and take his old bike for a ride...

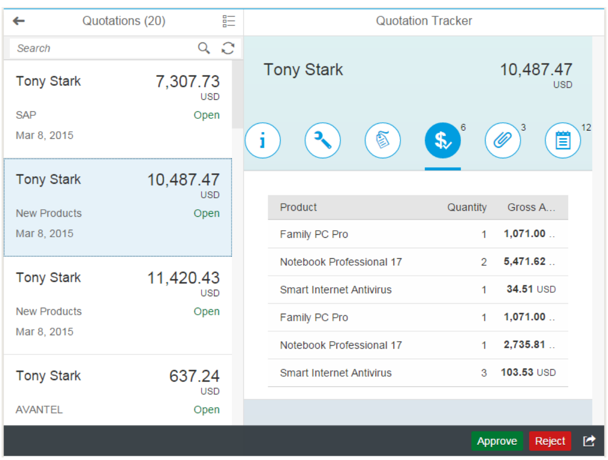
Fiori App Development



In the SAP Web IDE, I have created a new app from the “Approve Purchase Orders” sample application.

I have replaced the mock data to match my requirements. The quotations can be filtered by division (like New Products).

I have used an IconTabFilter to handle the navigation between the different sections.



I have implemented the first tab that contains a summary of the header information. This is especially useful for first-time users for whom it may not be obvious what is the division and what the date refers to (could be creation, change, completion, etc.)

I have also implemented the Finance section as a table view.

It even works on the phone!