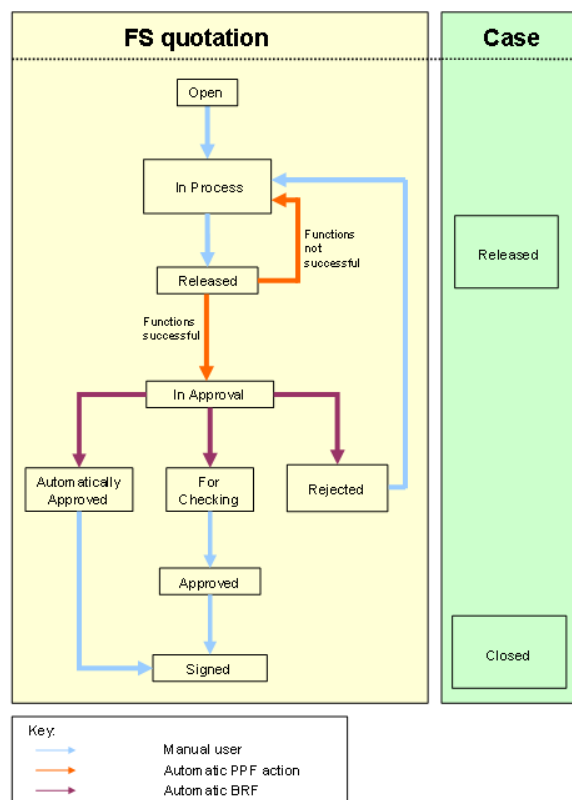


Quotation Tracker

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 it 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

Introduction to Design Thinking

User Experience Journey

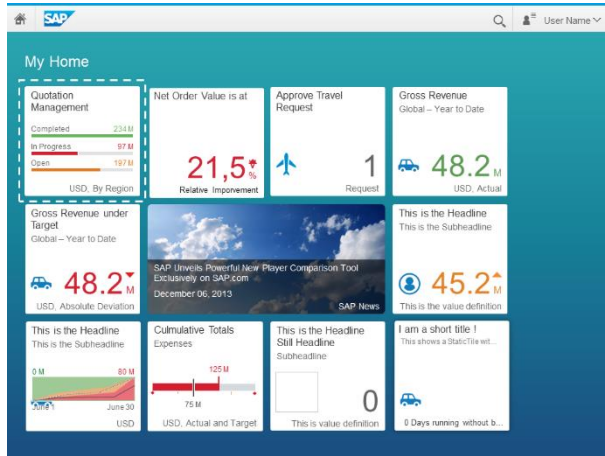
Current User Experience Journey

Duration of the Journey: 1 week

Mindset <i>What is on the Persona's mind while taking the actions of their journey? How do they feel each step of the journey?</i>	Great, a new project! 😊	Let's solve this challenge 😊	Are costs within targets?	Costs for all parts?	Everything checked?
Actions <i>What actions and activities does the Persona take while going thru the journey to achieve their goal?</i>	What format is that file using? 😞	Which CAD system? 😞	Are we missing costs? 😞	Make vs buy decision? 😞	Finally, project solved! 😊
Touch points <i>What touch points does the Persona have? (Tools, channels, devices, conversations, and so on.)</i>	Open RFQ	Wait for Engineering 😞	Wait for Finance 😞	Wait for Purchasing 😞	Close RFQ 😊
	Read Attached Requirements	Read Attached Drawings	Read Costing Structure	Read Vendor RFP	Validate all attachments
	Workflow Email	Workflow Email	Workflow Email	Workflow Email	Workflow Email
	CRM System	CAD System	ERP System	SRM System	CRM System

Mock Up

Quotation Management



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

Quotation Management

Status: Open | Customer: Tony Stark | Division: New Products

Quotation / Item	Customer	Status	Division	Revenue	Due Date	Eng	Pur	Fin
25000201 / 100	Tony Stark	Open	New Products	66,020 USD	May 5 th	✓	✓	
25000201 / 200	Tony Stark	Open	New Products	70,000 USD	May 5 th		✓	✓
25000183 / 100	Tony Stark	Open	New Products	45,200 USD	May 6 th	✓	✓	✓
25000623 / 100	Tony Stark	Open	New Products	66,020 USD	May 6 th	✓		
25000071 / 200	Tony Stark	Open	New Products	55,000 USD	May 6 th		✓	
25007211 / 100	Tony Stark	Open	New Products	66,020 USD	May 6 th	✓		
25002121 / 100	Tony Stark	Open	New Products	70,000 USD	May 7 th	✓	✓	
25002121 / 200	Tony Stark	Open	New Products	66,020 USD	May 7 th		✓	✓
25002121 / 300	Tony Stark	Open	New Products	70,000 USD	May 7 th	✓		
25381122 / 100	Tony Stark	Open	New Products	25,400 USD	May 8 th	✓	✓	✓
25381122 / 200	Tony Stark	Open	New Products	66,020 USD	May 8 th			
25000371 / 100	Tony Stark	Open	New Products	55,000 USD	May 8 th	✓		
25000812 / 300	Tony Stark	Open	New Products	66,020 USD	May 8 th			
90007211 / 400	Tony Stark	Open	New Products	70,000 USD	May 8 th			

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.

Requirements: Engineering (checked), Purchasing (checked), Finance (not checked), Documents, Timeline

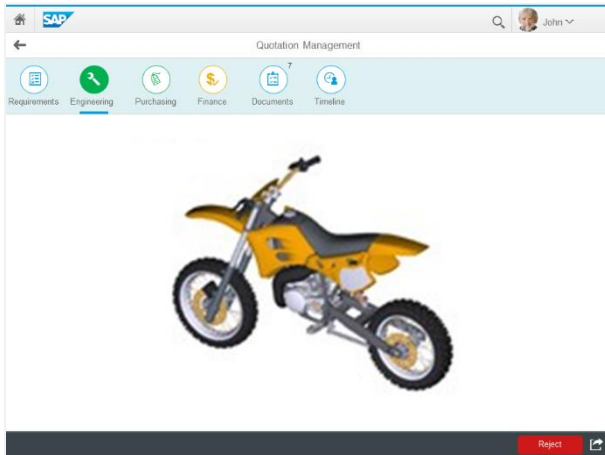
Header

Quotation / Item	25000201 / 100
Customer	Tony Stark
Status	Open
Division	New Products
Due Date	May 5 th , 2015
Expected Revenue	66,020 USD

Characteristics

Frame	All Terrain - Dirt
Engine	1,200 cc
Pneumatics	T63 Dual Sport Tire (F/R)
Suspension	High Performance Shocks
Accessories	Mounted Camera, GPS
Custom Modifications	Install weapon system (see doc), Paint Red & Gold

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.

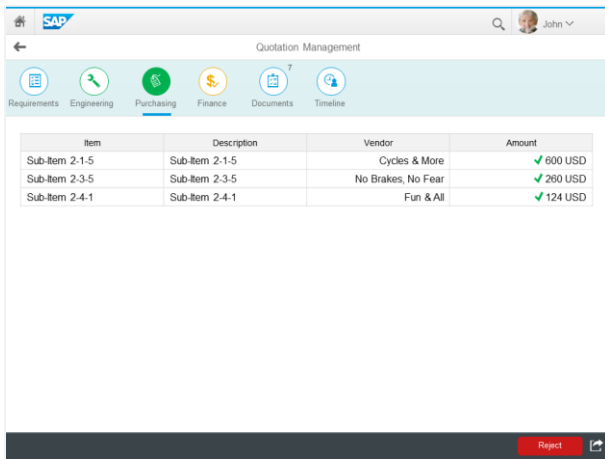


On the Engineering tab, the CAD drawing is rendered using SAP Visual Enterprise Viewer.

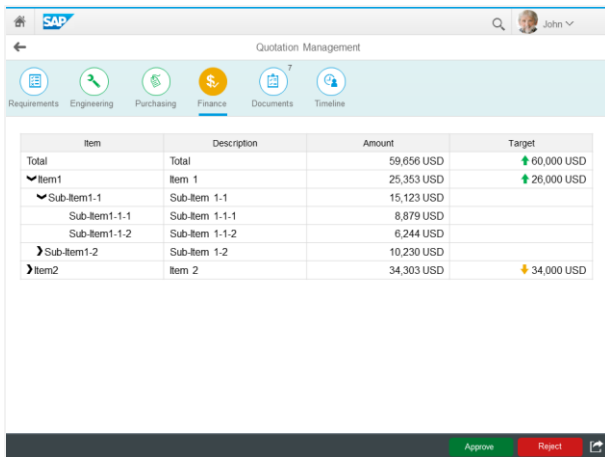
<https://www.youtube.com/watch?v=cK9FUJeeSuw>

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.

Type	Description	Upload Date	Upload User
Customer Drawing	Customer Drawing	May 4 th , 2015	Engineer 1
Engineering Drawing	Engineering Drawing	May 4 th , 2015	Engineer 1
RFP for new Part Item 2-1-3	RFP for new Part Item 2-1-3	May 6 th , 2015	Purchaser 2
RFP for new Part Item 2-3-5	RFP for new Part Item 2-3-5	May 6 th , 2015	Purchaser 2
RFP for new Part Item 2-4-2	RFP for new Part Item 2-4-2	May 6 th , 2015	Purchaser 2
Cost Estimate	Cost Estimate	May 8 th , 2015	Finance 3
Additional Customer Attachment	Additional Customer Attachment	May 3 rd , 2015	Account Manager 4

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).

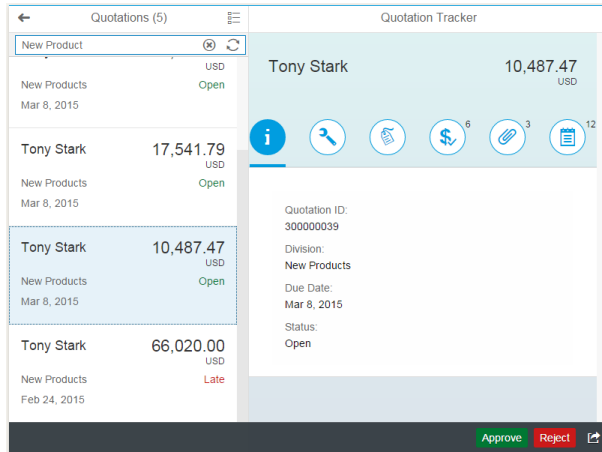
Activity	User	Time
John approved Finance	John	Today at 11:32 AM
John completed a call	John	Today at 12:25 AM
Finance 2 added a Document	Finance 2	Yesterday at 11:14 PM
John approved Purchasing	John	Yesterday at 11:30 AM

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...

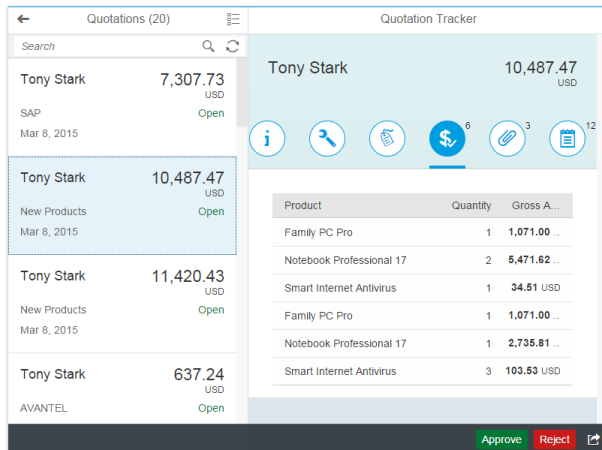
Fiori App Development



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!

