Front Office - Customer details Change – Fiori application

This Fiori application is designed for shipping company- front office team. This is similar to requirement requested by one of shipping client in earlier organization.

Background of existing transaction – to be converted to FIORI

The shipping company ABC uses the standard SAP transaction code "XD01" to registration customer, XD02 for change, XD03 for displaying customer information. Snap shot of transaction is given below for reference.

This standard transaction has much information to be filled and many of them are mandatory. As given in screenshot above, apart from general data of customer, primary sales and financial information are required to complete registration.

Persona using this SAP transaction in ABC shipping company:

Linda is a Persona, who works as a customer representative of shipping company ABC. Many customers, who wish to ship/transport their products, communicate with front office either by visiting in person or by mailing information to fron office based on frequency of communication to front office.

When the customer reaches 'Customer representative' of ABC Company, in this case reached Linda, customers provide necessary information for registering the customer, or changing the customer information if already registered. Linda then creates or changes the customer information, and forwards the details to back office to process. The back office will communicate back to Linda for additional customer information. The sales and finance team will validate sales and financial information and update in SAP system. Once the information is received, the shipment is processed using other backend teams such as package, logistics and customs.

Linda gets frequent requirement to changes customer details, as the customer base varies from 5000 to 20000.

Name: Linda

Picture

15 years experience in customer handling and logistics.

Job Title / Role:

ABC – Customer representative

I would like to improve efficiency with which customer information is changed / maintained, as this is a frequent process.

JOB RESPONSIBILITIES

1. Interact with customer to get suitable information of shipment.
2. Change (maintain) customer information in SAP system.
3. Support back office with information required
4. Get documents from customer, validate, scan and attach it to system for back office to process

MAIN GOALS

Reduce the time taken to change customer information, and have restricted role based access of information.

PAIN POINTS

The authority to change irrelevant information by Front office, such as Sales, and finance information creates following problems.
1. Front office cannot have access to business critical information which is irrelevant. This is a security of information issue.
2. Having authority to change irrelevant information can create responsibilities away from work scope, causing accuracy problems.

NEEDS

Have access to only information required for front office operations, and not having access or being responsible for access of information in sales and finance.

STAKEHOLDERS

Main persons in contact during work:

Customer, back office team, front office team members.

COMPETENCIES

Casual User	✖	Power User
Proactive	✖	Reactive
Work in team	✖	Lone Fighter
Global focus	✖	Local focus
Innovative	✖	Conservative

The standard method of change customer information transaction has following drawbacks.

1. The front office who updates customer information should have all the information upfront to complete the change, as many fields are mandatory in standard trasnaction. This causes delay in creation / change.
2. Front office team will have access to sales and finance information, as all were available in standard transaction. The sales and financial information is not necessary from front office team, and hence not required. This was the reason, one of earlier client has requested to create several transactions based on category of informations available in applications.
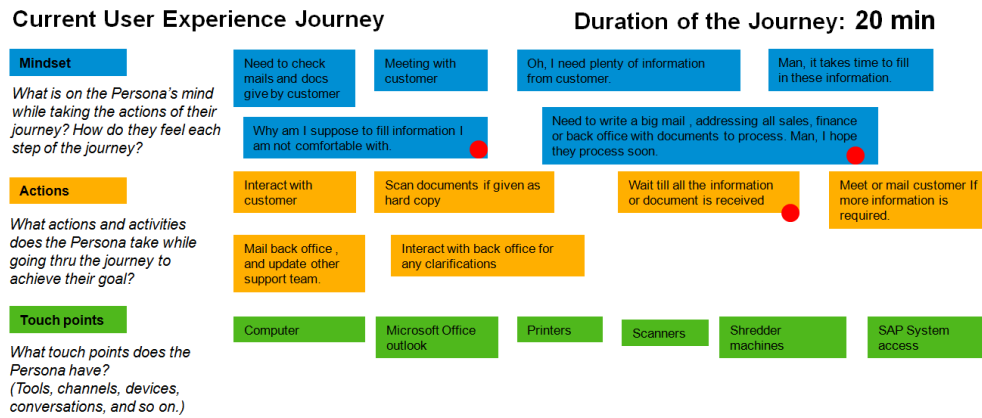
Need for new application for front office team:

The new application requirement is to help front office perform only the task they are responsible, and have additional options that are relevant for their day to day business needs.

Introduction to Design Thinking
User Experience Journey

Current User Experience Journey **Duration of the Journey: 20 min**

The main pain points are due to access of irrelevant information, which gives front office option to maintain information they are not responsible of. This causes delay, and security threat of business critical information, as information can be misused by wrong team. Also, other role specific information such as documents has to be dealt via mails, than applications. This causes inconvenience as the details or the flow won't be in sync, and not centralized.

Design principles used for designing new Fiori application:

The new Fiori application is designed using 'Decomposition' principle of SAP Fiori app.

The Transaction XD02 for change customer information is divided to 3 sub applications.

1. Front office application – to maintain general data
2. Sales team – To maintain sales information, be it basic or elaborate details.
3. Financial team – to maintain financial aspect, be it basic or elaborate details.

Using new Fiori application, the front office team will have access to change customer general details, and also additional option to upload supporting files provided by customers. 'File upload' is the most useful functionally for front office team, as almost all requirements for customer details change comes with supporting documents to validate the change.

The standard transaction XD02 does not facilitate file upload, however, since the new Fiori application is role specific, the custom Fiori application designed for front office would provide option to upload and maintain the shipping related document.

Various UI components used in designing new Fiori application is given below. The images given below are taken directly from design proto type or from implemented application.

|	
Icon Tab	
Simple forms	Delivery Plant: D108 Delivery Type: International
Check Boxes	☑ Mainly Civilian Usage ☐ Mainly Military Usage
File Uploaded	[ ] Browse... Upload File
Image Display	

Since the application designed is to change existing customer applications, the '**Master Details**' project template was chosen to design this application. Full screen application would be appropriate for create customer application (which is not in scope of current application). Not all screens designed are covered.

*The Mock prepared using 'Sap Fiori Prototype'* is given below,

1. The customer basic information, using 'Icon tab' and 'Simple forms' UI components.
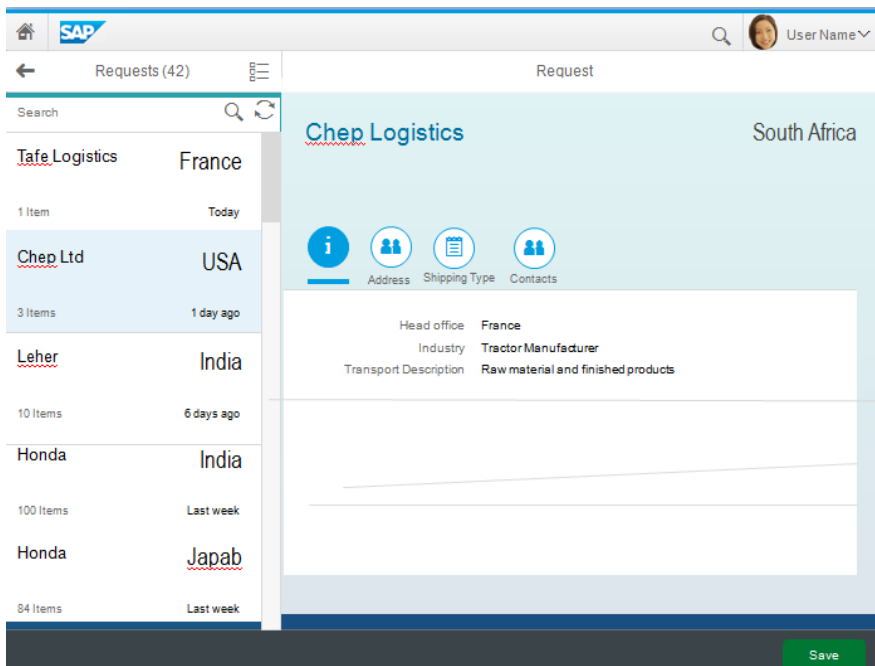
2. Shipping type tab with UI components such as 'Check box' and 'Editable simple form'.
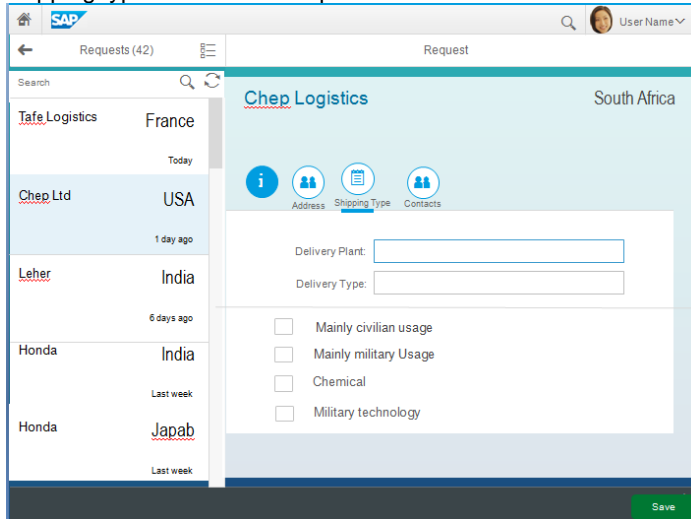
Sample screen shot of application developed using FIORI UI component is given below for reference. The video related to this document does not cover screens for mobile, hence given below,
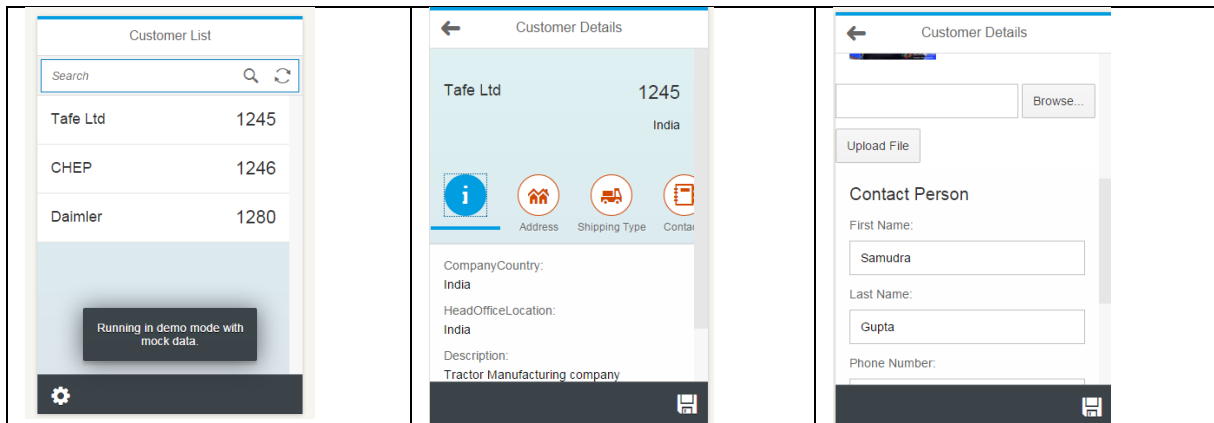
The Screen for uploading the supporting document is designed but not implemented yet. A sample file upload is designed, implemented and tested as a part of current application design. Screen shot of same is given below. The real front office application may have more additional requirements.The application designed follows the principles of Fiori application, and are as follows,

Simple	Designed with minimal UI components in each screen. Focuses only the required details for Front office.
Responsive	Works with all work conditions
Coherent	The design and flow is consistent with other Fiori applications.
Role Based	Covers all the required fields for front office, including additional details not covered in standard transactions. Target: Shipping industry.
Delightful	It provides efficient and delightful experience.

The Web IDE usage and the demo of application using Mock data is given in 2 minutes video available in youtube link : https://youtu.be/gUTq7Z3uwhA   or
https://www.youtube.com/watch?v=gUTq7Z3uwhA&feature=youtu.be