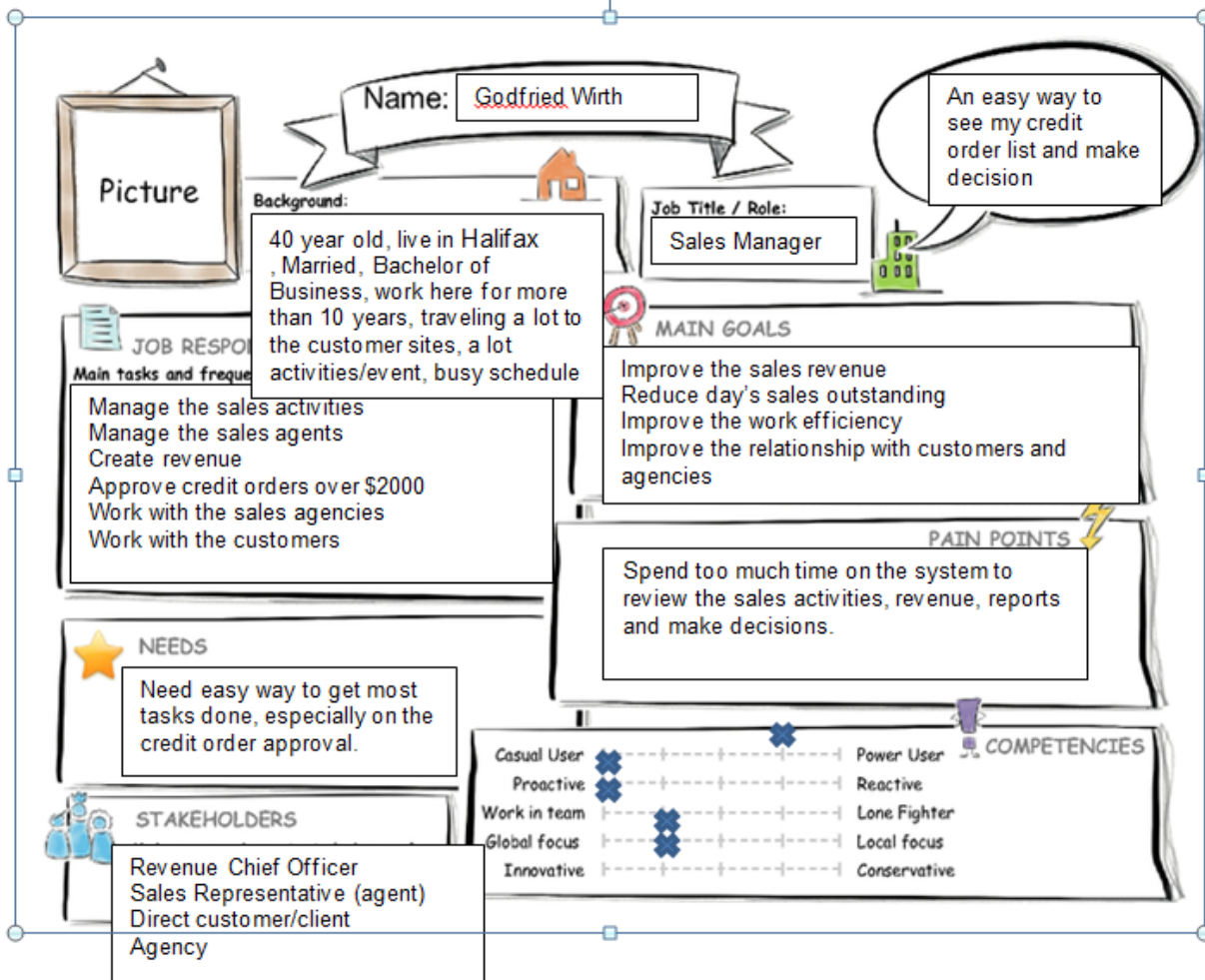# Credit Order Approve Fiori App

## 1. Story

We are a Canadian national newspaper company. Our main revenue source comes from the advertisement. A direct customer or sales agency books some order(s) into our SAP ERP system via one of our sales regions so that their ad contents can be displayed on our daily national newspaper, on certain page of certain section for certain area(also called zone). Sometimes, due to a certain reason, like deadline missing, technical problem, double booking in the same section, the customer or agency is not satisfied with their ads appearing on the paper. As a result, their corresponding sale agent (representative) has to fully or partially credit the customers by creating a credit order in our SAP ERP system.

Our company has a strict policy for creating a credit order over CAD $2000 by a sales agent: it must be approved by his/her sales manager before further processing. So each sales manager has a role to grand an approval for those credit orders belonging to his/her sales organization. Right now, he/she has to log onto the ERP system, run some report/transaction, review the list and give the approval/rejection to each credit order assigned to him/her.

This Fiori App is built for the sale managers, who want a quick, easy, convenient way to send the approval or rejection.

## 2. Persona

Mr. Godfried Wirth, Sales Manager for East Region



**Name:** Godfried Wirth

An easy way to see my credit order list and make decision

**Picture**

**Background:**
40 year old, live in Halifax , Married, Bachelor of Business, work here for more than 10 years, traveling a lot to the customer sites, a lot activities/event, busy schedule

**Job Title / Role:**
Sales Manager

**JOB RESPO[NSIBILITIES]**
Main tasks and freque[ncy]

Manage the sales activities
Manage the sales agents
Create revenue
Approve credit orders over $2000
Work with the sales agencies
Work with the customers

**MAIN GOALS**

Improve the sales revenue
Reduce day's sales outstanding
Improve the work efficiency
Improve the relationship with customers and agencies

**PAIN POINTS**

Spend too much time on the system to review the sales activities, revenue, reports and make decisions.

**NEEDS**

Need easy way to get most tasks done, especially on the credit order approval.

**STAKEHOLDERS**

Revenue Chief Officer
Sales Representative (agent)
Direct customer/client
Agency

**COMPETENCIES**

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

## 3. Experience Journey for Godfried

**Duration of the Journey: 2 hours**

**Mindset –** I need getting my credit order list done even with so many meetings and activities.

**Action –** Go to the office or sometime use VPN, connect my laptop to the company ERP system, review my credit order list by a customer transaction "zCreditOrder4Manger", and send the decisions.

**Touch points –** Laptop, the ERP system, transaction "zCreditOrder4Manger". Can I use a mobile device even my iPhone?

## 3b. Fiori Principle for Credit Order Approve App

- **Role based:** Sales Manager Credit Order Decision Role
- **Simple**: A sales manager only sees what needed to make the decision
- **Coherent:** Mater/Detail View transactional App, referring to SAP sample Purchase Order Approve application
- **Responsive/Adaptive:** The Sales manager can easily run the App on the laptop, tablet or mobile device
- **Delight:** A sales manager enjoys the app when he/she is traveling or even on vacation

## 4. Mock up

## Credit Order Data

Search

| | |
|---|---|
| Credit Order 1 | **8000.00** CAD |
| Credit Order 2 | **5000.25** CAD |
| Credit Order3 | **4000.00** CAD |
| Credit Order 4 | **3000.35** CAD |
| Credit Order 5 | **2001.00** CAD |

## Details

# Credit Order 1

**8000.00**
CAD
Full

Please approve credit order – Credit Order 1

3

| | |
|---|---|
| **Reason** | The customer is not satisfied with the ad position |
| Sales Agent | Monika Kenzie(100) |
| Created by | SKELLY |
| Created on | Feb 5, 2015 |

Approve     Reject

# 5. SAP Web IDE App

## . Schema metadata – data mock up

```xml
<edmx:Edmx Version="1.0"
    xmlns:edmx="http://schemas.microsoft.com/ado/2007/06/edmx"
    xmlns:sap="http://www.sap.com/Protocols/SAPData">
  <edmx:DataServices
      xmlns:m="http://schemas.microsoft.com/ado/2007/08/dataservices/metadata" m:DataServiceVersion="2.0">
    <Schema
        xmlns="http://schemas.microsoft.com/ado/2008/09/edm" Namespace="SALESORDERDATA">
      <EntityType Name="CreditOrder" sap:content-version="1">
        <Key>
          <PropertyRef Name="CreditOrderId"/>
        </Key>
        <Property Name="CreditOrderId" Type="Edm.String" Nullable="false" MaxLength="10" sap:label="Credit Order No."/>
        <Property Name="Status" Type="Edm.String" Nullable="false" MaxLength="10" sap:label="Status"/>
        <Property Name="LocalAmount" Type="Edm.Decimal" Precision="13" Scale="2" sap:label="Local Amount"/>
        <Property Name="LocalCurrency" Type="Edm.String" MaxLength="5" sap:label="Local Currency" sap:semantics="currency-code"/>
        <Property Name="DocuAmount" Type="Edm.Decimal" Precision="13" Scale="2" sap:label="Docu. Amount"/>
        <Property Name="DocuCurrency" Type="Edm.String" MaxLength="5" sap:label="Docu. Currency" sap:semantics="currency-code"/>
        <Property Name="Reason" Type="Edm.String" MaxLength="50" sap:label="Reason Text"/>
        <Property Name="AgentId" Type="Edm.String" MaxLength="10" sap:label="Sales Agent"/>
        <Property Name="AgentName" Type="Edm.String" MaxLength="40" sap:label="Sales Agent Name"/>
        <Property Name="Creator" Type="Edm.String" MaxLength="12" sap:label="Created By"/>
        <Property Name="CreatedOn" Type="Edm.DateTime" sap:label="Create on"/>
        <Property Name="AdvertiserId" Type="Edm.String" MaxLength="10" sap:label="Advertiser Id"/>
        <Property Name="AdvertiserName" Type="Edm.String" MaxLength="40" sap:label="Advertiser Name"/>
        <Property Name="AdvRating" Type="Edm.Decimal" Precision="1" Scale="0" sap:label="Adv Rating"/>
        <Property Name="AgencyId" Type="Edm.String" MaxLength="10" sap:label="Agency Id"/>
        <Property Name="AgencyName" Type="Edm.String" MaxLength="40" sap:label="Agency Name"/>
        <Property Name="AgencyRating" Type="Edm.Decimal" Precision="1" Scale="0" sap:label="Agency Rating"/>
        <Property Name="OriginalOrderId" Type="Edm.String" MaxLength="10" sap:label="Original Order Id"/>
        <Property Name="PublicationFromDate" Type="Edm.DateTime" sap:label="Published From"/>
        <Property Name="PublicationEndDate" Type="Edm.DateTime" sap:label="Published End"/>
        <Property Name="Zone" Type="Edm.String" MaxLength="15" sap:label="Zone"/>
        <Property Name="Section" Type="Edm.String" MaxLength="10" sap:label="Section"/>
        <Property Name="PageNo" Type="Edm.String" MaxLength="3" sap:label="Page Number"/>
        <Property Name="Column" Type="Edm.Decimal" Precision="2" Scale="0" sap:label="Column"/>
        <Property Name="Line" Type="Edm.Decimal" Precision="3" Scale="0" sap:label="Line"/>
        <Property Name="ColorCode" Type="Edm.String" MaxLength="3" sap:label="Color Code"/>
        <Property Name="KeyWord" Type="Edm.String" MaxLength="50" sap:label="Key Word"/>
        <Property Name="OrderCreator" Type="Edm.String" MaxLength="12" sap:label="Created By"/>
        <Property Name="OrderCreatedOn" Type="Edm.DateTime" sap:label="Create on"/>
      </EntityType>
      <EntityContainer Name="SALESORDERDATA" m:IsDefaultEntityContainer="true">
        <EntitySet Name="CreditOrders" EntityType="SALESORDERDATA.CreditOrder" sap:content-version="1"/>
      </EntityContainer>
    </Schema>
  </edmx:DataServices>
</edmx:Edmx>
```

## . Data sample

```
"CreditOrderId": "10000000",
"LocalAmount": 2500,
"LocalCurrency": "CAD",
"DocuAmount": 2000,
"DocuCurrency": "USD",
"Reason": "The customer is not satisfied with the ad position",
"AgentId": "100",
"AgentName": "Monika Kenzie",
"Creator": "SKELLY",
"CreatedOn": "/Date(1423026000000)/",
"AdvertiserId": "141732",
"AdvertiserName": "MICROSOFT",
"AgencyId": "1100 ",
"AgencyName": "AGENCY ONE INC",
"OriginalOrderId": "10000",
"PublicationFromDate": "/Date(1421038800000)/",
"PublicationEndDate": "/Date(1423198800000)/",
"Section": "ARTS",
"PageNo": "R11",
"Column": 2,
"Line": 80,
"ColorCode": "B3C",
```

```
        "KeyWord": "A Midsummer Night's Dream",
        "OrderCreator": "JHOWARD",
        "OrderCreatedOn": "/Date(1418360400000)/",
        "Status": "Partial",
        "Zone": "Metro Toronto",
        "AdvRating": 4,
        "AgencyRating": 5
},
```

## . Project Structure



## . Run with Mock Data

## Credit Order Data

Search 🔍 ↻

| | |
|---|---|
| 10000000 | 2500 CAD |
| CreditOrderId 1 | 511.2 LocalCurrency 1 |
| CreditOrderId 2 | 583.71 LocalCurrency 2 |
| CreditOrderId 3 | 6407.61 LocalCurrency 3 |
| CreditOrderId 4 | 7279.35 LocalCurrency 4 |
| CreditOrderId 5 | 4498.41 LocalCurrency 5 |

⚙

## Details

**10000000**  **2500** CAD  Partial

**Please approve credit order - 10000000**

💲 👤 🧾

Reason:
The customer is not satisfied with the ad position

Sales Agent:
Monika Kenzie(100)

Created by:
SKELLY

Created on:
Feb 4, 2015

**Approve**  **Reject**

---

## Credit Order Data

Search 🔍 ↻

| | |
|---|---|
| 10000000 | 2500 CAD |
| CreditOrderId 1 | 511.2 LocalCurrency 1 |
| CreditOrderId 2 | 583.71 LocalCurrency 2 |
| CreditOrderId 3 | 6407.61 LocalCurrency 3 |
| CreditOrderId 4 | 7279.35 LocalCurrency 4 |
| CreditOrderId 5 | 4498.41 LocalCurrency 5 |

⚙

## Details

**10000000**  **2500** CAD  Partial

**Please approve credit order - 10000000**

💲 👤 🧾

Advertiser:
MICROSOFT - 141732
★★★★

Agency:
AGENCY ONE INC - 1100
★★★★★

**Approve**  **Reject**

Credit Order Data | Details

| Credit Order Data | Details |
|---|---|
| Search | 10000000   2500 CAD   Partial |
| 10000000   2500 CAD | Please approve credit order - 10000000 |
| CreditOrderId 1   511.2 LocalCurrency 1 | Original Order Id: 10000 |
| CreditOrderId 2   583.71 LocalCurrency 2 | Published: 1/12/15 - 2/6/15 |
| CreditOrderId 3   6407.61 LocalCurrency 3 | Zone: Metro Toronto |
| CreditOrderId 4   7279.35 LocalCurrency 4 | Section: ARTS |
| CreditOrderId 5   4498.41 LocalCurrency 5 | Page No.: R11 |

Approve   Reject

The page at https://webidetestinglolpzp-p1941171687trial.dispatcher.hanatrial.ondemand.com says:

Approved, will be implemented late on

OK

The page at https://webidetestinglolpzp-p1941171687trial.dispatcher.hanatrial.ondemand.com says:

Rejected, will be implemented late on

OK

**. Further Enhancement**

- "Approve" and "Reject" button functionalities
- A gateway service development and connection