Functional Guide
ORBIS ConsumerONE based on MS- Dynamics CRM 365 and Resco

Version
V Q3 2018

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Change Log

Date	Author	Version	Note
18.09.2018	Henning Sittel	Q3 2018	Updated based on Dynamics 365 9.1

Non-Disclosure Agreement

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Development Agreement

It is subject to ORBIS to make adaptations in CRM and/ or Resco based on principles of best usability and technical feasibility. It is also subject to ORBIS to adapt data structure to the needs of development of the ORBIS ConsumerONE and/ or Microsoft CRM standard.

Content

Change Log 2
Non-Disclosure Agreement 3
Development Agreement 3
Content 4
1. Common about ORBIS ConsumerONE 1
1.1. Site Map/ Navigation 2
1.2. Security Roles 5
1.3. Access level definition 10
3. Master Data 11
2.1. Account 11
2.1.1. Description of Standard 11
2.1.2. UI 13
2.2. Contact 15
2.2.1. Description Standard 15
2.3. Product 16
2.3.1. Description Standard 16
2.4. Assortment (→ Listing) 19
2.4.1. Description Standard 19
4. Back office 24
3.1. Promotions 24
3.1.1. Standard description 24
3.2. Marketing Lists 26
3.2.1. Standard description 26
3.3. Business Activities 27
3.3.1. Standard description 27
3.4. Sales Folder 30
3.4.1. Description Standard 30
5. Field Processes 33
4.1. Preparation 33
4.1.1. Visit Planning 33
4.2. Visit Conduction 38
4.2.1. Selection Criteria 39
4.2.2. Business Activities 39
4.2.3. Order 40
4.2.4. Survey 42

4.3. Visit post-processes 46
4.3.1. Daily Report 46
6. Analytics 47
7. Figures 49

1. Common about ORBIS ConsumerONE

ORBIS ConsumerONE for MS Dynamics CRM is a vertical solution add-on to the Microsoft Dynamics CRM created by ORBIS AG for consumer industry. It was set up due to the fact, that Microsoft Dynamics CRM does not cover the specific needs of the consumer goods industry.

ORBIS ConsumerONE uses the standard features of Microsoft software as far as possible, but enriches as well its standard features and provides completely new features.
ORBIS ConsumerONE consists of a basic solution covering specific needs with specific modules and functions to be extended easily by other apps. These additional apps can be integrated seamlessly into the ORBIS ConsumerONE and MS Dynamics CRM.
The present document will describe solely functionality of the core functionality of the ORBIS ConsumerONE enriched with a description of the project specific adaptations; common functionality of MS Dynamics CRM is not part of the given standard functionality description.
All processes described in this document are available in online and offline systems in general and also work in OnPrem and Online environment. If certain functionality is not available in an specific mode this is mentioned explicitly.
Specific field sales processes are also available on a Resco based mobile app, enriched with consumer specific processes by ORBIS.

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1.1. Site Map/ Navigation

The Site Map in CRM is divided in areas and subareas which hold the individual module links:

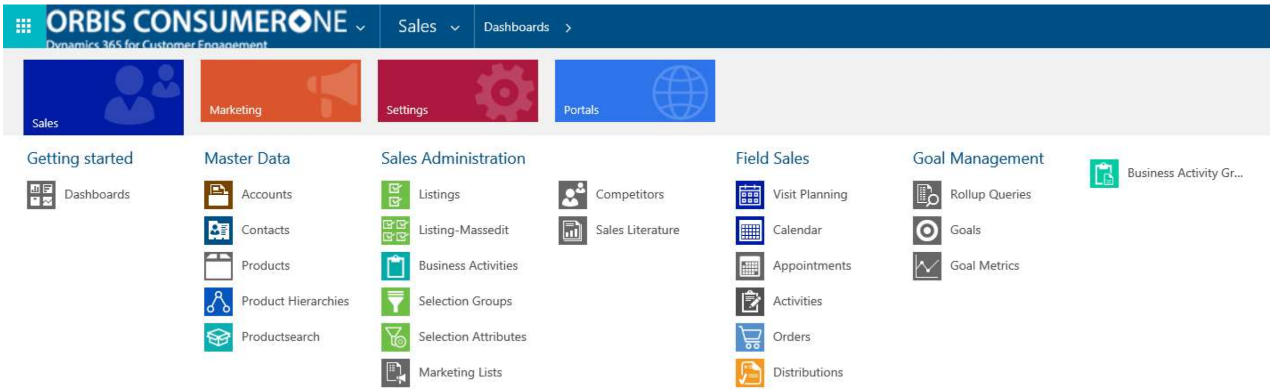


Figure 1: Example SiteMap CRM classic mode

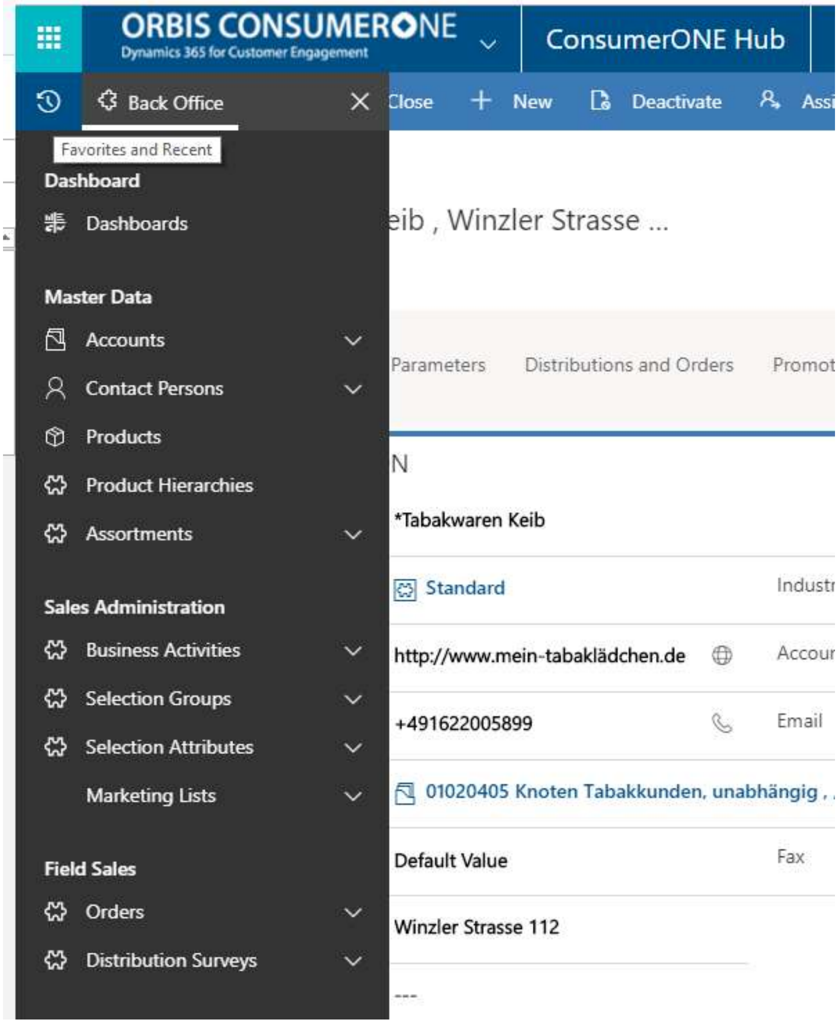
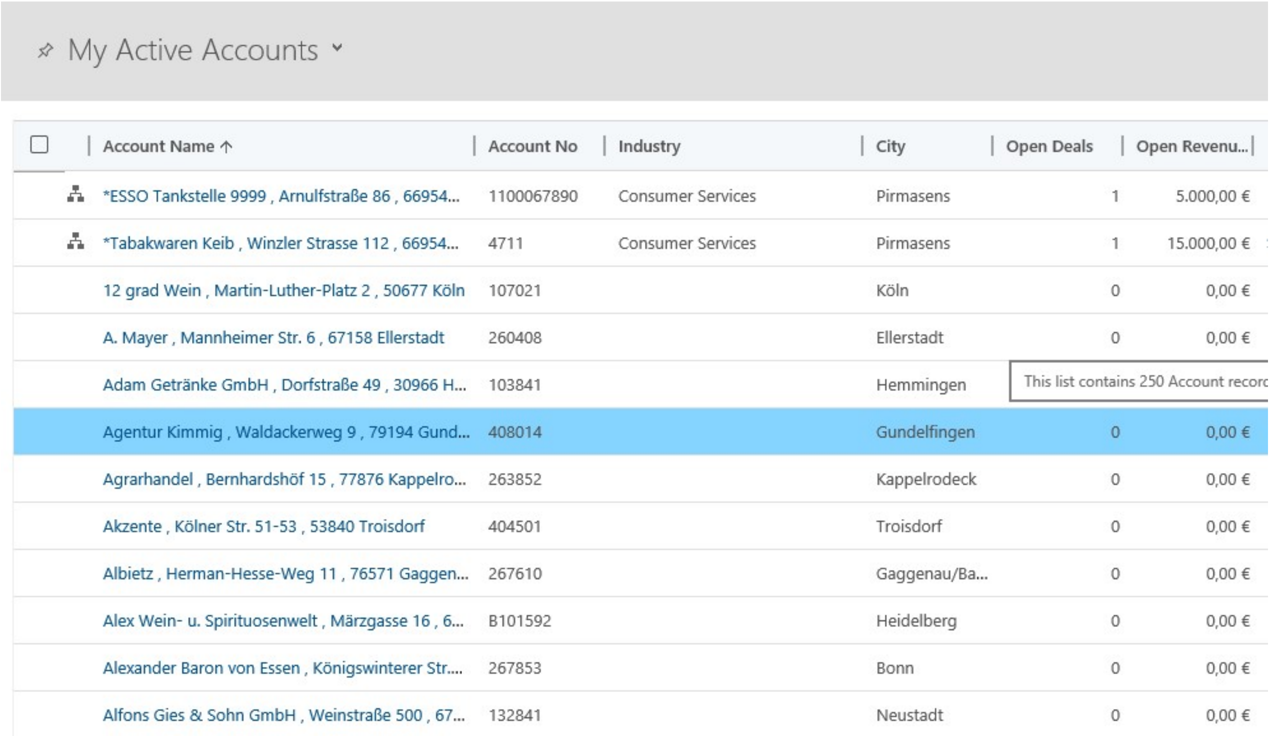


Figure 2: Example for sitemap in Unified UI in CRM

Via the Site Map the user has access to all modules he is allowed to; modules are organized in groups. When clicking on a module´s name the user sees the overview of the specific module.



My Active Accounts

Account Name ↑	Account No	Industry	City	Open Deals	Open Revenu...
*ESSO Tankstelle 9999 , Arnulfstraße 86 , 66954...	1100067890	Consumer Services	Pirmasens	1	5.000,00 €
*Tabakwaren Keib , Winzler Strasse 112 , 66954...	4711	Consumer Services	Pirmasens	1	15.000,00 €
12 grad Wein , Martin-Luther-Platz 2 , 50677 Köln	107021		Köln	0	0,00 €
A. Mayer , Mannheimer Str. 6 , 67158 Ellerstadt	260408		Ellerstadt	0	0,00 €
Adam Getränke GmbH , Dorfstraße 49 , 30966 H...	103841		Hemmingen	This list contains 250 Account recorc	
Agentur Kimmig , Waldackerweg 9 , 79194 Gund...	408014		Gundelfingen	0	0,00 €
Agrarhandel , Bernhardshöf 15 , 77876 Kappelro...	263852		Kappelrodeck	0	0,00 €
Akzente , Kölner Str. 51-53 , 53840 Troisdorf	404501		Troisdorf	0	0,00 €
Albietz , Herman-Hesse-Weg 11 , 76571 Gaggen...	267610		Gaggenau/Ba...	0	0,00 €
Alex Wein- u. Spirituosenwelt , Märzgasse 16 , 6...	B101592		Heidelberg	0	0,00 €
Alexander Baron von Essen , Königswinterer Str....	267853		Bonn	0	0,00 €
Alfons Gies & Sohn GmbH , Weinstraße 500 , 67...	132841		Neustadt	0	0,00 €

Figure 3: Example Account overview

In the overview the user can select data records by using views, open records and can start several other processes like Create New, Delete, start reports, etc.

Sitemap on the Mobile

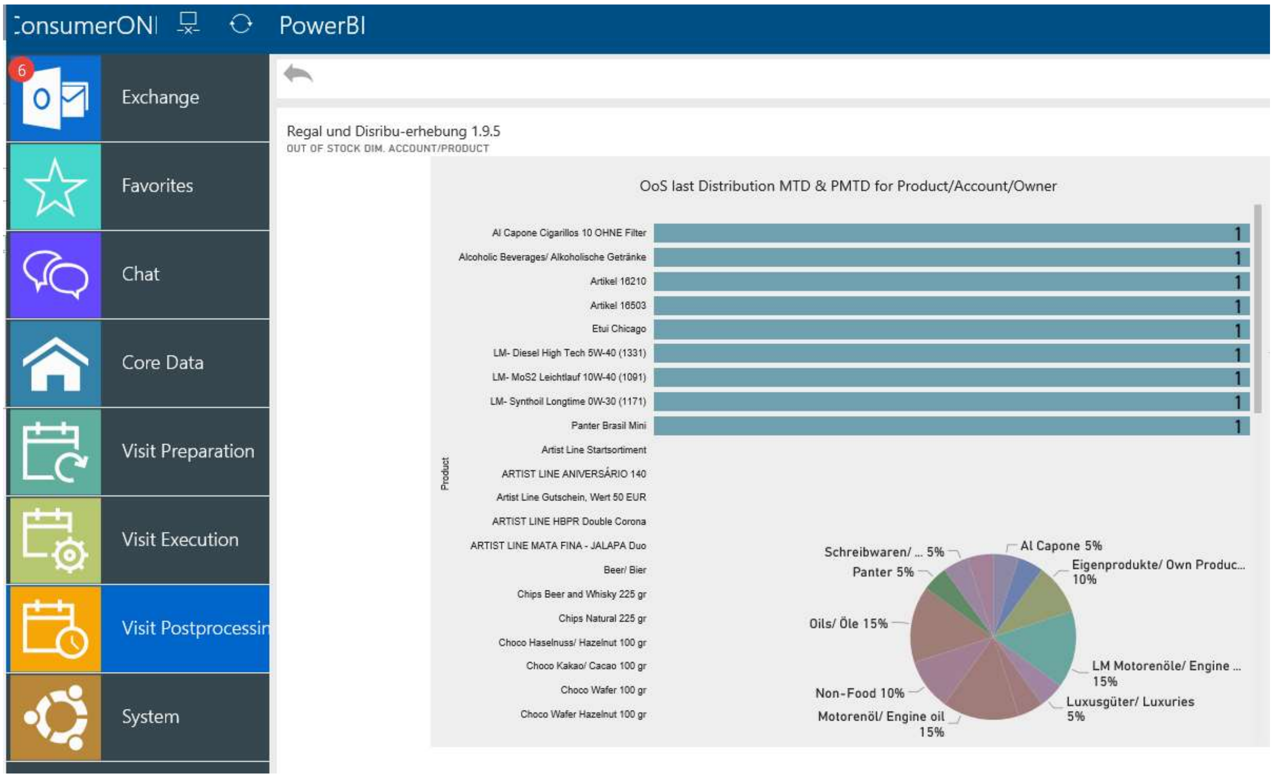


Figure 4: Example for Mobile sitemap

1.2. Security Roles

What a user can do within Dynamics CRM depends on the assigned security role/ -s. If there are different levels of allowance, defined by different security roles, always the highest level wins. In security roles, there is a detailed definition per entity what is possible for a user in terms of Create New, Edit, Read, Delete, etc. These rights depend on the assignment of the current user as an owner to a specific record and his assignment to a specific organization (business unit).

- Basics

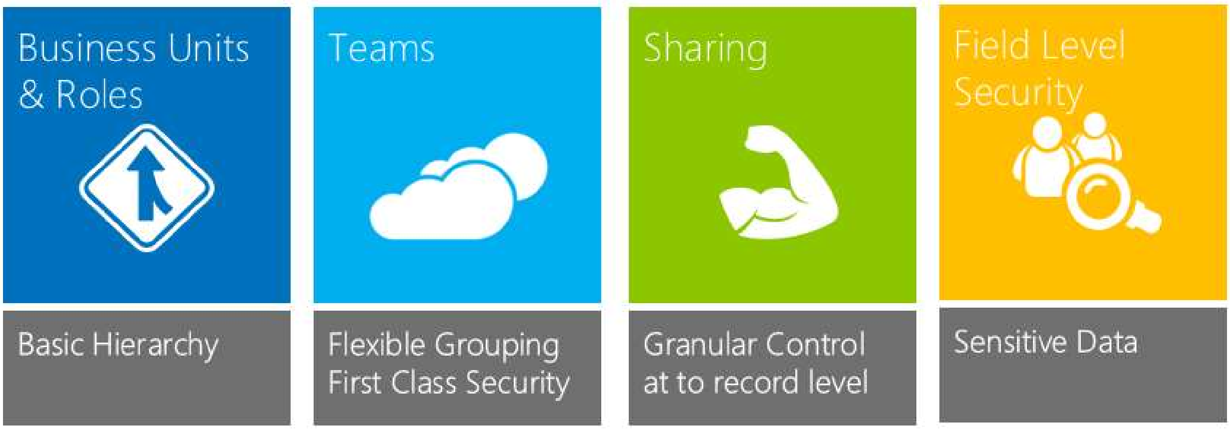


Figure 5: Different parts of the security model

- Examples for business units and their structure

Figure 6: Example for simple structure

- User assignment to a certain business unit

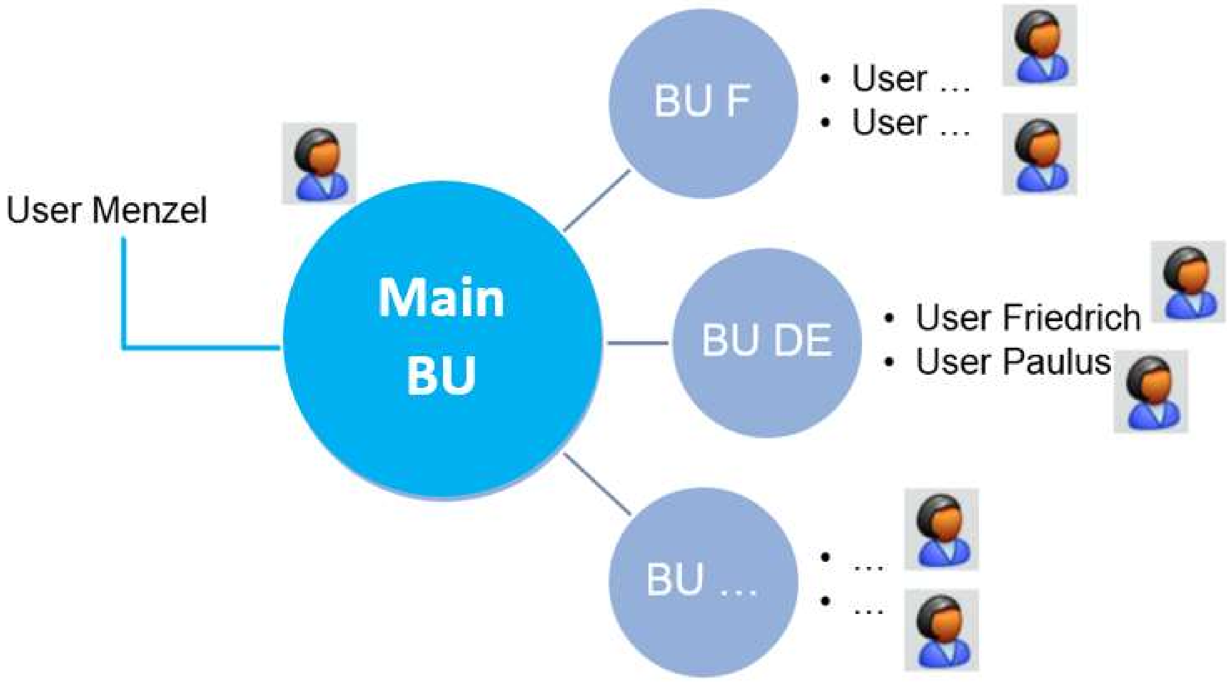


Figure 7: Example for assignment of users to a certain business unit

- Security roles in context with a business unit

Security roles per business unit

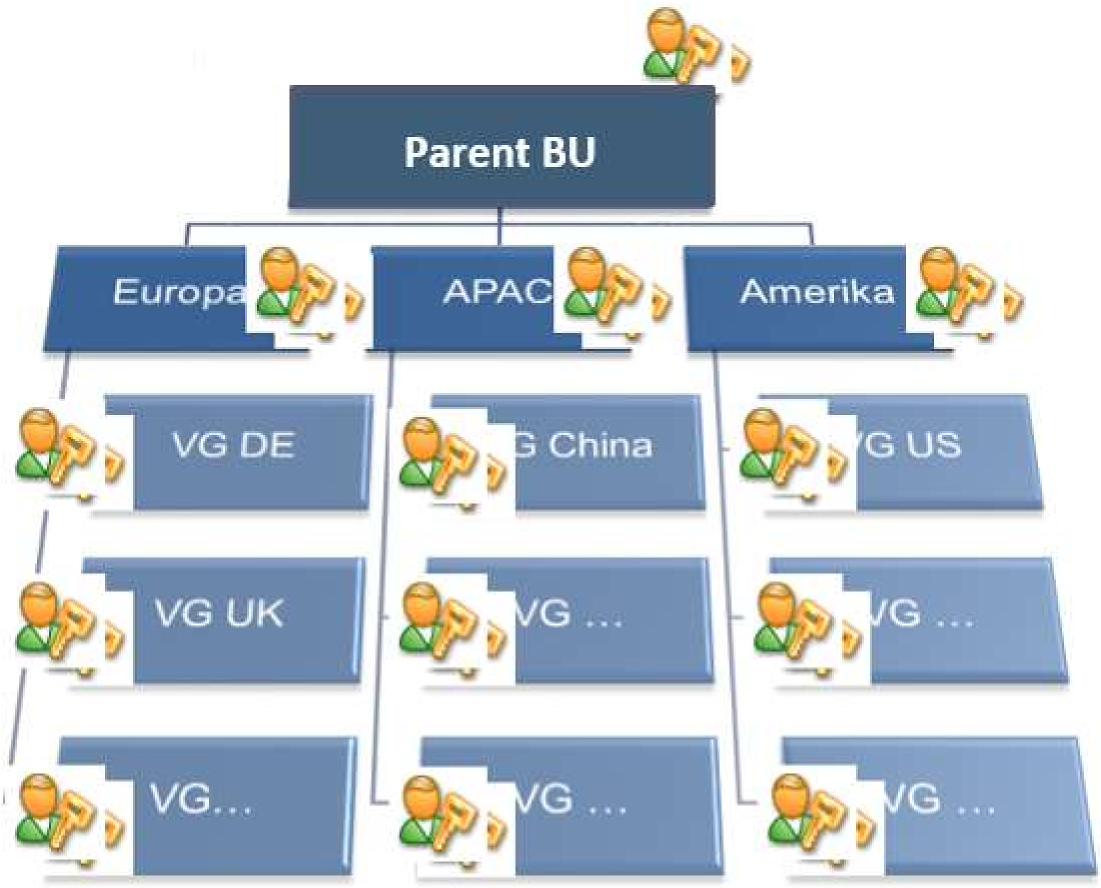


Figure 8: Example for business unit depending assignment of security roles

- Access levels of security roles

Access levels via seucirty roles

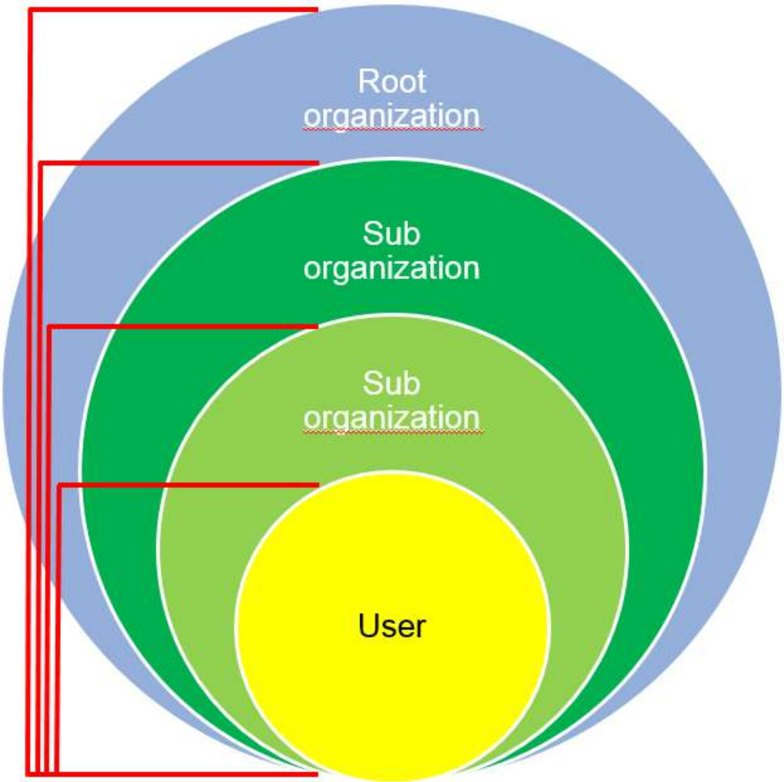


Figure 9: Example for access levels of a seucirty role

Meaning of different levels:

- Root Organization: User has access to all records belonging to the root organisation and all inferior business units
- Sub- Organization: User has access to all records of organizations below the organization the user is assigned to.
- User: has access to records only where he is assigned as owner

- Scheme for access check

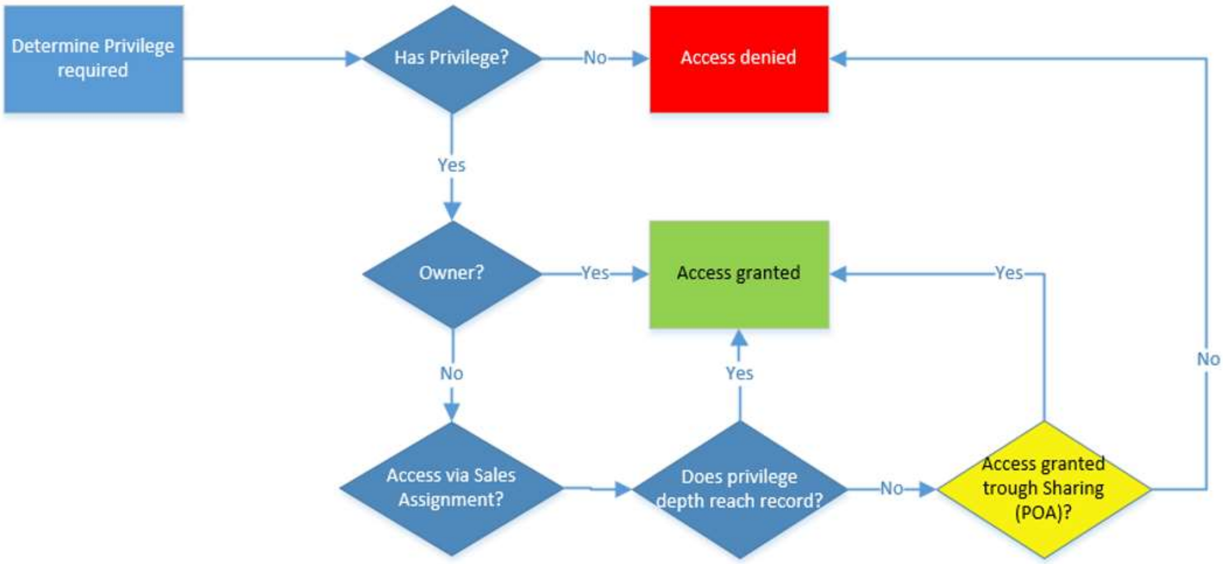


Figure 10: Example for access check depending on security role assigned

- Scheme of a security role

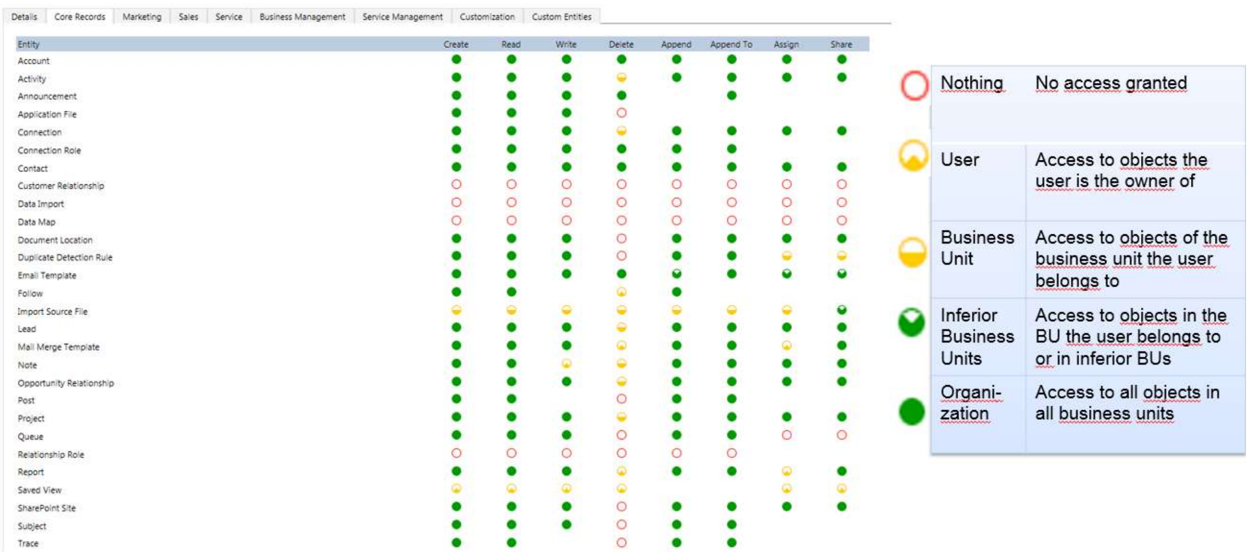


Figure 11: Example for access definition within a security role

1.3. Access level definition

Authorization

Create: **right to create a record.** Note: You can crate an object for yourself only if you have the right to create and read as well.

Read: **right to read a record.**

Write: **right to actualize a record.**

Assign: **right to assign the record to another user.**

Append: **right to connect a record to another.** Note: to attach a note to an account record the user needs the right "append" for account and the right "append to" for note.

Append to: **right to connect the individual record to another. The rights "append" and "append to" are correlated.**

Share: **right to share a record with another user or team. By sharing an object other users can access the specific record.**

Delete: **right to delete a record.**

Figure 12: Access levels within a security role

3. Master Data

2.1. Account

2.1.1. Description of Standard

The MS Dynamics CRM module "Accounts" maintains data of all accounts that may have different account types like

- Hierarchy nodes/ Key Accounts and POS/ stores
- Direct and indirect Accounts
- Wholesalers
- …

The screen layout is the same for each of them (in standard). It is as well the same for different user groups, but optimized for back office in web mode and for field sales in mobile mode . The focus is on the mobile application to provide most important information to the sales rep.
Therefore, the following data are shown in account master data:

- Address data
- Communication data
- Contact partners
- Planned promotions
- Assigned listings
- Order history
- Activity/visit history
- …

Regularly, account master data are provided from an ERP system, especially SAP ERP. Therefore, the data model is prepared to import data from an ERP in Common and SAP in detail. It is also possible to use ORBIS ConsumerONE for MS Dynamics CRM as a stand alone system or with a rudimental link to a ERP system.
If fields are delivered from ERP they cannot be modified in at all. Single non-ERP fields instead can be modified by MS Dynamics CRM users within the CRM system.
In general it is possible to create new accounts in CRM (for example as a prospect); since each company has its own way to handle prospects and accounts it is subject to the implementation project to find the appropriate way.

2.1.1.1. Account hierarchy

Account hierarchy is a basic topic in consumer goods industry, since agreements (esp. Listings and Promotions) are mostly negotiated and are maintained on a higher node in the account hierarchy. The need for these central agreements is mostly on the lowest (store) level of the hierarchy.
Via the "Parent Account" feature, the account hierarchy is built by using to point to the next higher level.

2.1.1.2. Owner

The “owner” is important in the consumer goods industry:

- It specifies the sales person responsible for the account (esp. Key Account Manager or Sales Rep).
- It enables access rights on records due to security roles.
- It is used to specify the data to be synchronized to the mobile device

In CRM, it is possible as well to specify a team (of users) as an owner of an account.
ORBIS also provides an enriched version of “Access Teams” that allows specifying several named users with different access rights and different roles according to an account. This feature, as an AddOn, is not installed automatically in this package but can be provided on request.

2.1.1.3. Name

Similar to any other module in MS Dynamics CRM, the account master data has a field “Name” as a kind of identifying the record. The content of name field is usually displayed in GUI controls of type “Lookup”. Since in the organized market, many POS belong to the same chain, their name is very often the same, e.g. “Metro C&C Market”.
ORBIS recommends importing into the name field a combination of attributes “Name” & “City” and “Street” to improve the records identification. ORBIS has implemented a logic to built this name during the save process.
The name attribute itself can be stored in an additional “Name2” field.

2.1.1.4. Visit Planning Parameters

To consider the account in the visit planning modules (concerning modus “Frequency Planning”) some parameters need to be maintained or are saved when completing a visit.

- “Is plannable”: only when checked this account will be regarded in the frequency visit planning
- “Last Scheduled Appointment”: This information is needed in the visit planning to propose a new appointment.
- “Start Schedule”: This information is used when “Last Scheduled Appointment” is not filled.
- “Visit Rhythm”: This is the visit rhythm in days, weeks, month and years, added on the “Last Scheduled Appointment” to calculate a new proposal record.
- “Preferred Day” and “Preferred Time”: Are used to specify the day and the time of the proposal. When “Preferred Day” is not specified, the day of the “Last Scheduled Appointment” will be used. E.g. “Preferred Day” is “Wednesday” => any proposal in the visit planning will be a Wednesday. If “Preferred Day” is Empty and the “Last Scheduled Appointments” week day was a Friday => The next proposal will be “Friday”
- “Tour” is not used in frequency planning, it is just for information; but the sales rep can use it to setup tours and to plan accounts according to the tours.

- "Actual Visits" is information only, not used in visit planning algorithm. The value is calculated when a visit has been completed.
- "Must Visits": The calculation of this field is not implemented in the standard, this needs to be done project specifically because there are many objectives that could influence the logic (like visit types etc.).

2.1.2. UI

Dynamics 365 currently offers different UI modes:

- Classic Mode

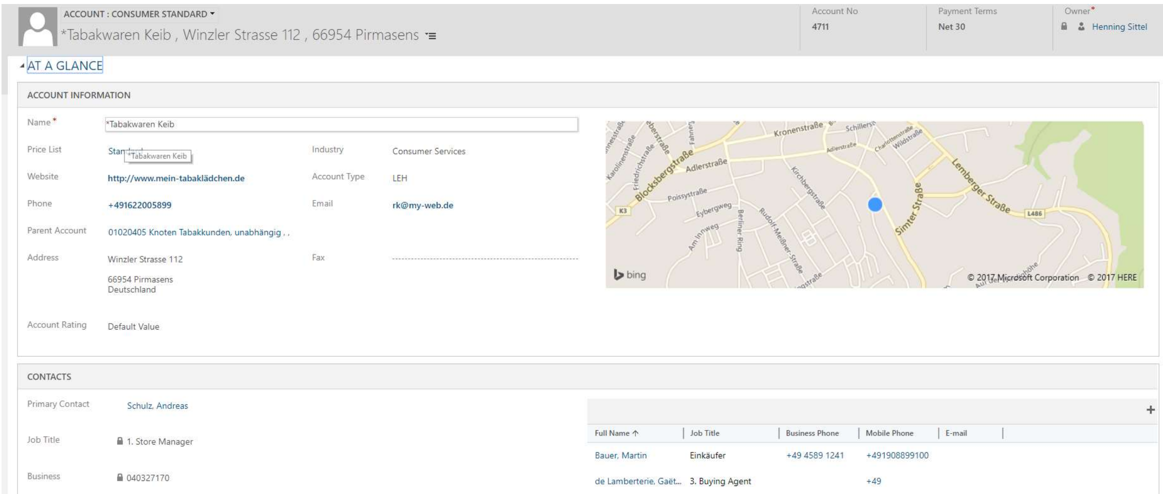


Figure 13: Example Classic UI

- Unified UI

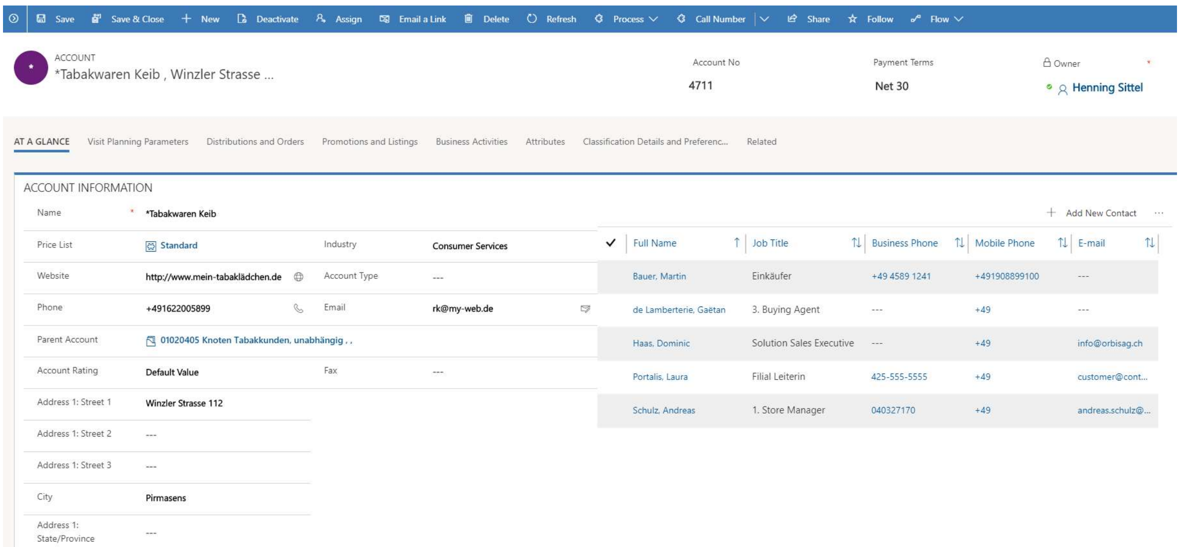


Figure 14: Example of Unified UI

- Mobile View

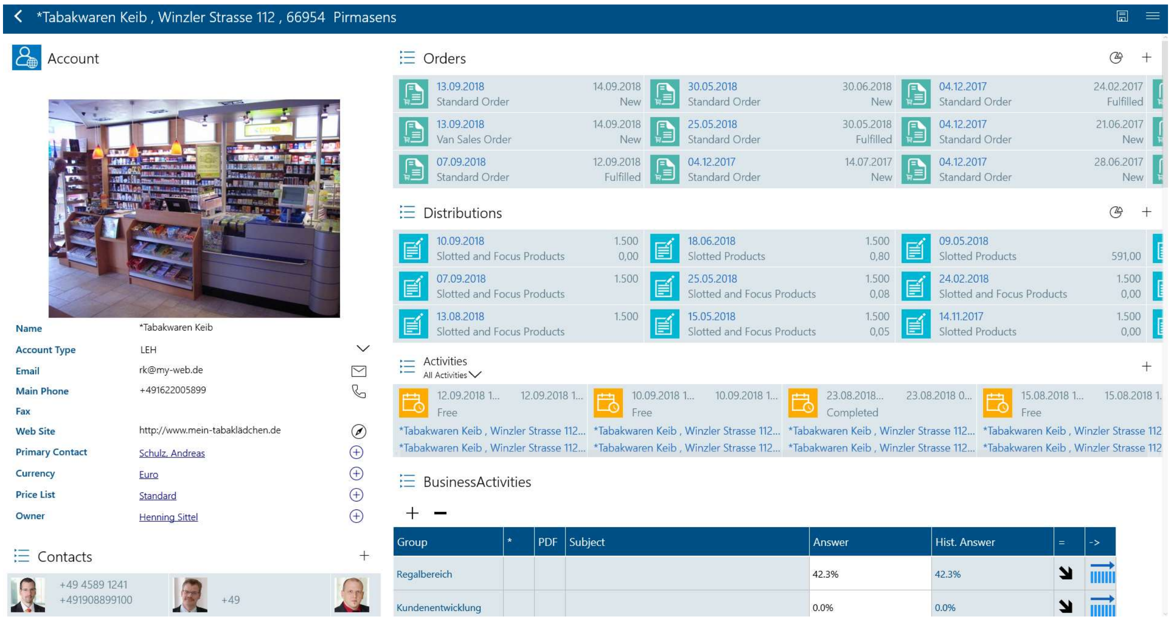


Figure 15: Mobile view of account

2.2. Contact

2.2.1. Description Standard

MS Dynamics CRM provides a module to maintain contact partners. Contact partners are usually the person working for the accounts.
This module is not specifically adapted for consumer needs and is provided from Microsoft standard.

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2.3. Product

2.3.1. Description Standard

The module “Product Master Data” can be used to maintain material records, like e.g.:

- Own products to be sold
- Competitor products
- POS Material
- …

The screen layout out is the same for each of these types.

2.3.1.1. Numbers and Name

It is possible to maintain

- Internal product number (ID)
- EAN (European Article Number)
- Name

2.3.1.2. Product Hierarchy

A products hierarchy levels above the product can be maintained in a separate module “Product Hierarchy” if every hierarchy level should be visible in each product; this functionality is similar to SAP ERP. A product hierarchy can have the following levels for example:

- Brand
- Sub Brand
- Segment
- Sub Segment
- Product Segment
- Product

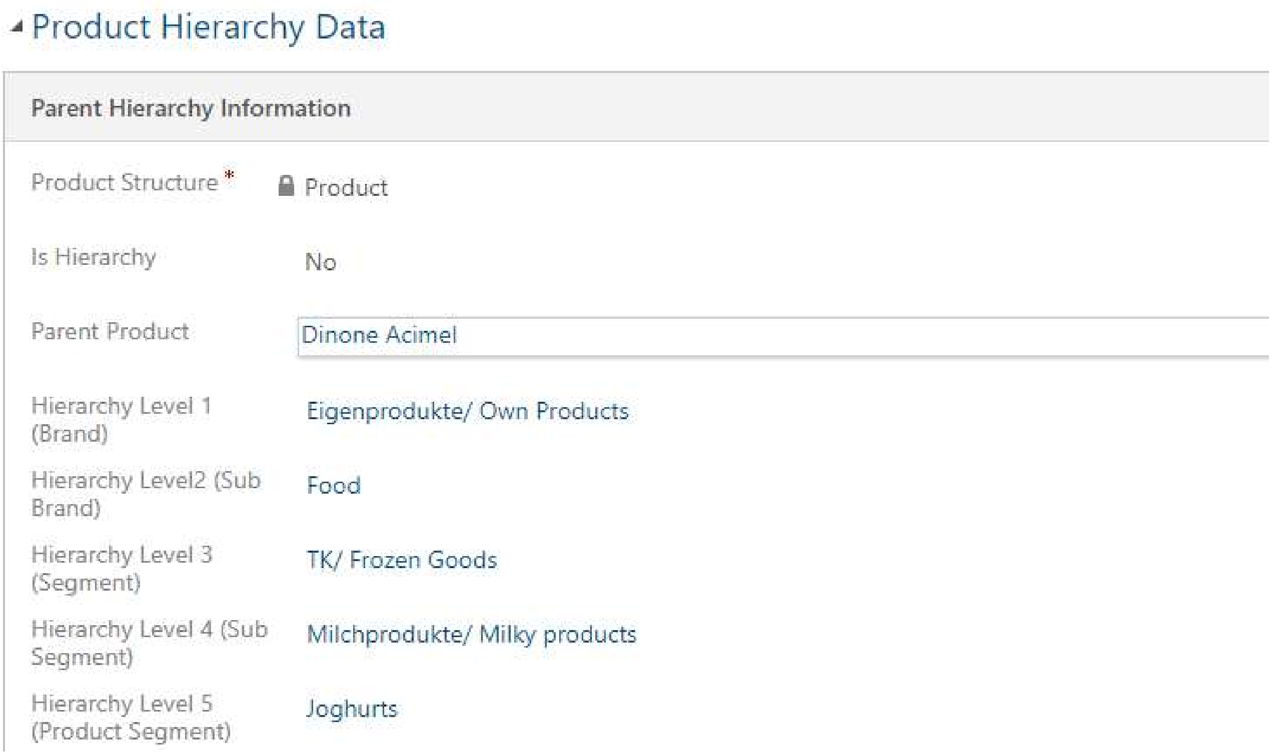


Figure 16: Example Product hierarchy

The five levels mentioned are already customized within the consumer solution.
A product can be linked to the lowest level “Product Segment”. The hierarchy can be set up in the Module “Product Hierarchy”. Additionally, each product level in the hierarchy can be linked to the product, too. This makes analysis and reporting easier.
The basically possible eight hierarchy levels come from the possibility of SAP ERP standard having maximum eight hierarchy levels, too. Because most companies do not use eight levels, ConsumerONE provides and uses five levels.

2.3.1.3. Bill of Material

Displays are very common in consumer goods industry. Displays do usually consist of regular products and are used to increase the selling of them in the POS as second placement.
The display itself is maintained as a product record. In an additional list the content product of the display can be maintained. This information is held in the Bill of Material list.
The Bill of Material is not broken up in an order, but is used like regular products. The details of a Bill of Material list are for information purpose only.

2.3.1.4. Price Data

ORBIS ConsumerONE uses the price lists of MS Dynamics CRM in orders. The order usually relies on one price, specified in the pricelist with definition Default = True. It is also possible to maintain a specific price list per account that will be used in an order instead.
The data in the section "Price Data" are locked fields in MS Dynamics CRM and should not be removed from the form, even if they are not mandatory for consumer goods processes.

2.3.1.5. Measurements shelf share and logistical data

The fields "Width" and "Length" are the measurements of the consumer unit of the products, as they are placed in the shelf. These measurements are used in Distribution module for shelf share calculation. According to the alignment of the product in the shelf, "Width" or "Length" is multiplied by the entered facings to calculate the shelf share of each product. Logistical data "Default Unit" and "Default Value" are mandatory fields of MS Dynamics CRM 2011 standard. Furthermore "Decimals Supported" is a mandatory field of MS Dynamics CRM 2011 standard which need to be filled when creating a record.

2.4. Assortment (→ Listing)

2.4.1. Description Standard

2.4.1.1. Management of listings

A listing[1] is a set of products that shall be sold to the assigned accounts. Another wording known is "assortment".
Within the organized retail landscape, having retail chains as main actors a listing represents the set of products. This set of products is the result of a negotiation between the manufacturer and the chains headquarter. In many countries, the manufacturer has to pay for every listed product a so-called "listing fee".
The acting persons are the Key Account Manager (manufacturer) and purchase manager (retail).
The products defined in the listing can be bought regularly by the retail (central warehouse or even store). Furthermore, are these the products that should be distributed by the stores belonging to the chain.
The ORBIS ConsumerONE module "Listings" is used to specify the products planned centrally. Listings are usually maintained by KAMs.
Products specified in the Listing module are used in the modules "Order Entry" and "Distribution" to preset these products as a list.
Due to this preset functionality in Order Entry and Distribution the ORBIS ConsumerONE enhanced the Listing modules to specify further types of assortments. Therefore, there are the following listing types available:

- Listing (as described before)
- POS Material: Used in order entry process for ordering POS material
- Focus Products: Used in Distribution to capture product data in the store relevant for marketing purposes.

In the non-organized retail, the listing functionality can as well be used to specify customer type specific assortments and to preset them in Order Entry, too.
The graphical user interface of module listings is equal for any listing type.
The basic data object to be maintained in module "Listings" are

- Header data
- Assigned Accounts
- Positions / listed products
- Notes and attached documents

[1] The Northern American markets use as well the term „Slotting" instead of "Listings".

2.4.1.1.1. Listing Header data

The following data are relevant on header data level:

- Node: If a node is given, the listing can be allocated along the hierarchy down to the lowest level. To which entries in detail it is allocated can be determined by selecting the appropriate value from a drop down list “Distribute rule”. Alternatively, listings can be tight to members of marketing lists. The appropriate marketing lists (one or many) can be specified in the ML area of the listing header.
- Name: this is a free text field for specification of the listings name. It’s a mandatory field.
- Validity period
- Notes: variable number of texts and attached documents

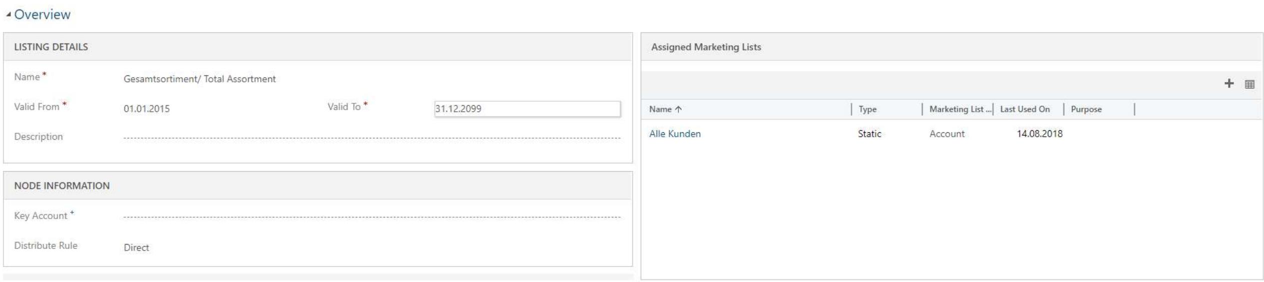


Figure 17: General entry screen “Listings”

2.4.1.1.2. Assigned Accounts (→ Member in Listing)

“Member in listing“ defines the accounts the listing has been distributed to by an automatic process in the background. These are usually the stores or Point of Sales (POS) belonging to a hierarchy node.
The assignment is technically needed to have a preset functionality of listed products in order entry or survey process.
The assignment of POS to listings is usually done by some automatism, provided by ORBIS ConsumerONE. The automatism is set up as a so called recurring job that assigns new accounts to a listing and also removes accounts, not fulfilling the criteria anymore.
Listing nodes are prerequisite to assign the accounts automatically to a listing. The following node types are possible:

- Key Account: According to this node specification any account within the hierarchy below the Key Account will be assigned to the listing (e.g. any account below Key Account/Hierarchy node “Carrefour“), including this Key Account itself.
- One or many Marketing List/ -s: This type of listing node enables a more precise specification of account that shall be assigned to the listing (E. g. could any account of type “supermarket” belonging to hierarchy “Carrefour” be in the target group. Other example: Any restaurant in city of Berlin.)

The recurring job has the following filter criteria in the standard configuration:

Only listings with flag “Distribute” => True will are considered.
Only listings with “valid from date” => system date are considered.

When having a Marketing List as node, the member accounts of the marketing list are assigned to the listing. In case there are more than one possible listing, one with node Key account and several with node Marketing List, it doesn´t matter- the system will create an assignment for each account found to each listing.
The recurring job can be started manually; it triggers a workflow process in the background that calls a so called Plugin.
Accounts can be assigned manually, too. In this case the assignment by the recurring job should not be used.

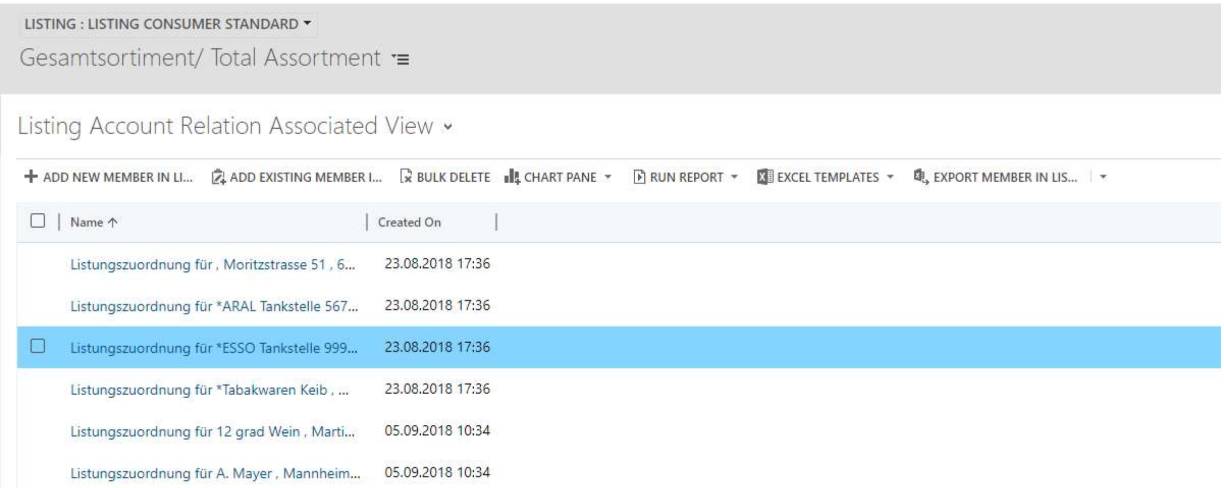


Figure 18: Listing Screen “Members in listing”

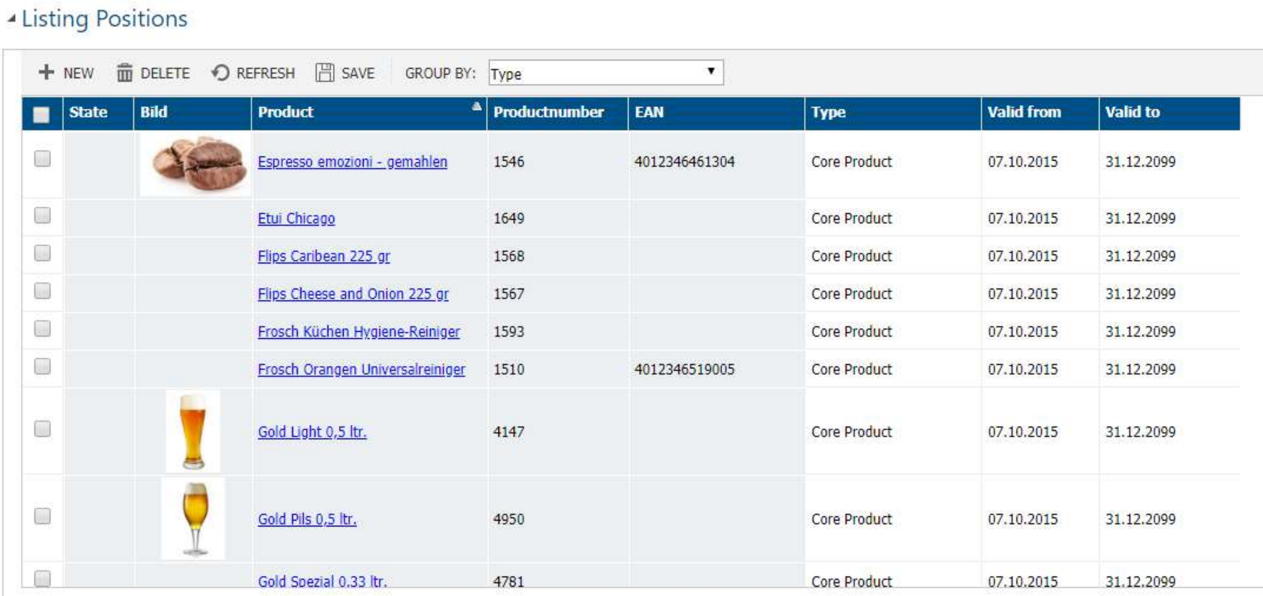
2.4.1.1.3. Listings in Account master data

The created assignments of accounts to one or more listings are the result of the recurring job "Assign listings". These assignments are visualized in the account master data.

2.4.1.1.4. Listing products

The main data of the listing are the specification of the products. It is possible to add products to the listing and specify them:

- Position type: "Core Product" or "Optional Product"
- Period of validity: a product can not appear twice in a listing with an overlapping validity



State	Bild	Product	Productnumber	EAN	Type	Valid from	Valid to
		Espresso emozioni - gemahlen	1546	4012346461304	Core Product	07.10.2015	31.12.2099
		Etui Chicago	1649		Core Product	07.10.2015	31.12.2099
		Flips Caribean 225 gr	1568		Core Product	07.10.2015	31.12.2099
		Flips Cheese and Onion 225 gr	1567		Core Product	07.10.2015	31.12.2099
		Frosch Küchen Hygiene-Reiniger	1593		Core Product	07.10.2015	31.12.2099
		Frosch Orangen Universalreiniger	1510	4012346519005	Core Product	07.10.2015	31.12.2099
		Gold Light 0,5 ltr.	4147		Core Product	07.10.2015	31.12.2099
		Gold Pils 0,5 ltr.	4950		Core Product	07.10.2015	31.12.2099
		Gold Spezial 0.33 ltr.	4781		Core Product	07.10.2015	31.12.2099

Figure 19: Listed products

2.4.1.2. Additional Functions

2.4.1.2.1. Copy

Single Listings can be copied:

- Header data are copied. The name field is enhanced by the prefix "(copy of)"
- Listing detail data are copied
- Assigned Accounts are not copied, due to the fact that each listing has usually different accounts and that batch processes do this.

2.4.1.2.2. Mass Edit: Adding products into several listings

It is possible to add products into several existing listings. This is an important process when new products arise to be added into listings.

4. Back office

3.1. Promotions

3.1.1. Standard description

Promotions are any activities to support and to enhance the sales of products. In the consumer goods industry most promotions take place in the Point of Sales / at the account. Promotions have always a temporal limitation.
Promotions need to be negotiated with the key account in the organized market, before they can be carried to and executed in the POS. This is the task of the KAM.
In the non-organized market promotions are setup by Marketing or Sales management. The sales rep negotiates the promotion with the independent accounts. Sales Reps are responsible for planning and execution of promotions in the Point of Sales.
The ORBIS ConsumerONE for MS Dynamics CRM bases on the MS CRM Campaign module and enhances this module according to needs of promotions as known in the consumer goods industry. Therefore, the campaign module is renamed into “Promotion”.
But any campaign feature of MS Dynamics CRM remains as known from the standard.
The actual enhancements of the Campaign module into a “Promotion” module are:

- The possibility to add a key account as promotion node
- The possibility to maintain different periods (order period, placement period, …)
- The Possibility to maintain promotional products
- Possibility to add Business Activities with a relation to a promotion (that might be flagged as relevant for creation of visit proposals → creation of visit proposals out of a promotion)
- Consider promotional products within order entry
- Promotions including project specific fields and promotional products can be copied

3.1.1.1. Promotion header Data

The main promotion header data are name, promotion type, periods, etc.

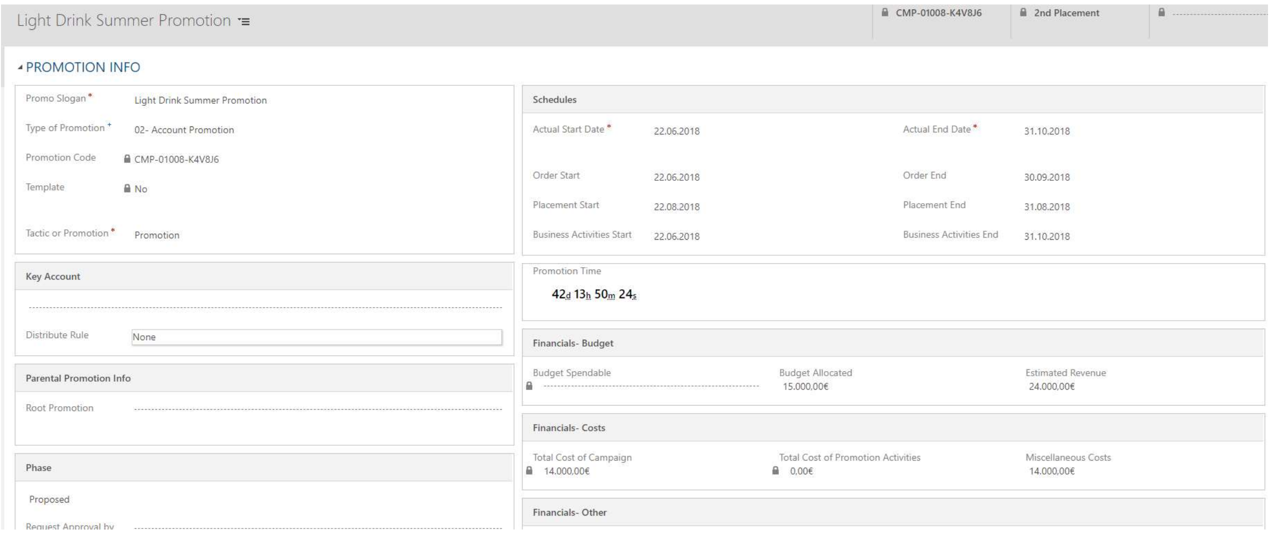


Figure 20: Screen “Header data in Promotions”

3.1.1.2. Accounts in promotions

It is possible to maintain a key account in the promotion header data and to make this promotion available to each POS assigned to the specified nodes hierarchy. The appropriate assignments are created by a recurring job “Assign Promotion” that also can be started manually instead of defined intervals. As a result of this recurring job there are assignment records in a separate entity “Promotion Account Relation” that are used in field sales processes /for example finding promoted products within the order module when creating an order).

Another possibility is to assign a static/ dynamic marketing list to the promotion, having the member type “Account”. (Please read the chapter about Marketing List) and having accounts specified.

The assigned marketing lists are also used by the recurring job to create assignment records.

3.1.1.3. Promoted Products

In ORBIS ConsumerONE for MS Dynamics CRM it is possible to maintain promoted products. These products are used in sales processes as mentioned before.

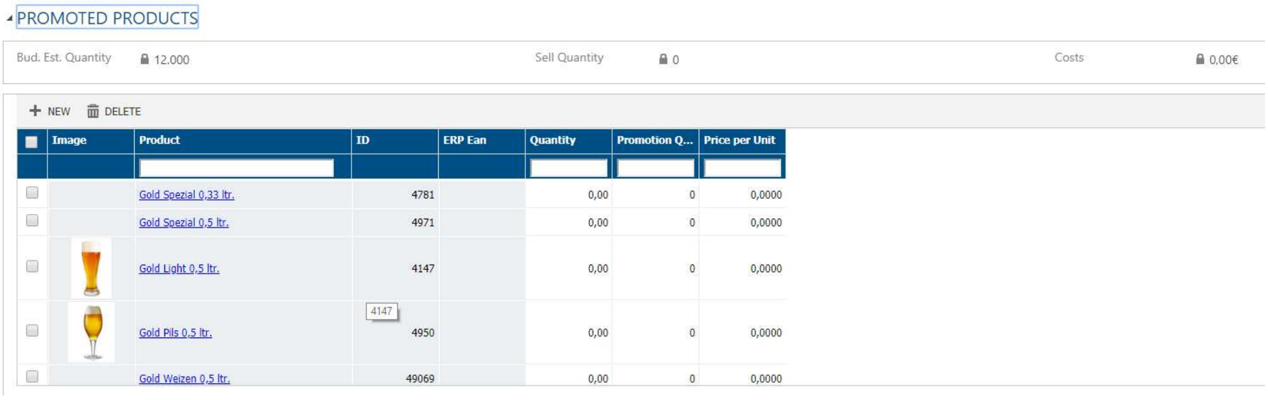


Figure 21: Promoted Product specification

3.2. Marketing Lists

3.2.1. Standard description

Marketing Lists are used in MS Dynamics CRM to do a segmentation on accounts or contacts or leads and to run promotions with these. There are two main types of Marketing Lists:

- Static Marketing Lists: The user maintains the list of accounts manually. The list does not change automatically. The members are saved in the Marketing List. For each member of the ML an assignment record is created by the recurring job “Resolve Promotions”. If a member is added or skipped, the assignment records get updated.
- Dynamic Marketing List: the user adds an Advanced Find View to the Marketing Lists. The Advanced Find View basically contains the segmentation criteria. Whenever opening the dynamic Marketing List, only the members are displayed, fulfilling at this point the criteria. The members are not saved in the Marketing List. For each member of the ML an assignment record is created by the recurring job “Resolve Promotions”. If a member is added or skipped, the assignment records get updated.

In ORBIS ConsumerONE, Marketing Lists should use accounts only as member type only in the following processes:

- Promotions
- Listings
- Business Activities

to specify the targeted POS.

3.3. Business Activities

3.3.1. Standard description

Business Activities are an important functionality in ORBIS ConsumerONE. Within the visit process the Business Activities do have two main intentions:

- Flexible definition of 'To Dos' that should be done at the account by the responsible sales during a visit and should deliver a dedicated answering record that can be used for Analytics.
- Visit planning function → Business Activities can be used in the visit planning process to plan visits based on existing business activities (linked to a promotion). → Based on business activities visit proposals can be ctreated.

Mostly, Business Activities are created centrally by

- Sales managers
- Sales Back Office
- Key Account Managers

Normally, sales reps act on these business activities during the visit process.

3.3.1.1. "Permanent" / "Non-Permanent" Business Activities

Business Activities can be defined as Permanent or Non-Permanent:

- Permanent: These could be permanent Business Activities, showing up every time (e.g. "Capture Order", "Capture Distribution Data" …) or
- Non-Permanent: The Business Activity show up during a specified period until the user gave 1 feedback/answer. These kinds of Business Activities are important within the promotion process, because the sales rep need to support the execution of promotions at the POS (e.g. "Present Promotion", "Check 2nd placement", "Capture Promotional Order" …).

3.3.1.2. Validity period

The Business Activity may have a validity period and will be shown only if the visit date is within the specified date range of the Business Activity. Before or after this range the Business Activity will not appear.
If such an Business Activity has been answered, it will not be shown afterwards even if the visit date is in the range.
If a Business Activity is flagged as "permanent" and has a validity period it will be raised to be answered within each visit during the specified period.

3.3.1.1. Flag "Ad Hoc Question"

If a sales rep is doing a visit he might do much more than working on the given Business Activities. Therefore, ORBIS provides a possibility to maintain a "pool" of defined Business Activities the sales rep can select from to document his additional time consuming "tasks". These Business Activities are flagged in the creation process with a special flag "Ad hoc question" to be available in the pool.

3.3.1.2. Flag “relevant for Visit Planning”

If this flag is set, it is possible to create visit proposals based on existing Business Activities. These proposals have a validity period (taken over from the Business Activity resp. the promotion in the background) and hold the information of the underlying promotion as well.
In the visit planning assistent the visit proposals show the promotion info; so the sales rep has a chance to know where the proposals come from.

3.3.1.3. Assigned accounts

Business Activities might be linked to a hierarchy node or to a marketing list if they are created “stand alone”. The ORBIS ConsumerONE for MS CRM contains a process that resolves the Business Activity along the hierarchy of the node or resolves it to all members of the marketing list by creating assignment records. This logic is also based on the recurring job model by ORBIS.
If a Business Activity is created out of a promotion, the Business Activity does not need a specific account node or marketing list; it will use the assignment records existing for the linked promotion to make the Business Activity available for the accounts regarded in the promotion.

3.3.1.4. Business Activities in visit planning

The sales rep can see in the visit planning assistant if visit proposals have been created due to Business Activities.

3.3.1.5. Business Activities in visit execution

The Business Activities give an overview what to do on account site. E.g. a regular process during a visit is to create an order; therefore, a Business Activity “Capture Order” can be defined.
Business Activities can be grouped if (in the creation process) a group has been assigned to.

3.3.1.6. Weighting factors in groups and activities

Since spring version 2018 ORBIS ConsumerONE allows to maintain weighting factors per Business Activity and per group as well. This information can be used to calculate a percentage value per group over all activities belonging to that group and to calculate an allover value using the groups that also have their individual factors. Typical example for using this function is the perfect store approach.
In the mobile solution, the system shows also the last existing historical value to enable the comparing of actual and historical values.

Group	*	PDF	Subject	Answer	Hist. Answer	=	->
Theke/ Kasse				100.0%	100.0%		
			Bietet das Regal 3 Böden?	yes	yes		
			Humidor: Anzahl Präsentationsboxen geprüft				
			Präsentationsboxen neu angeordnet				
			Zweitplatzierungsfläche reservieren				
Visibility				100.0%	100.0%		
			Außenwerbung überprüfen				
			Rating für Service				
			Regalbereich				

Figure 22: Example for calculation based on weighting factors

3.3.1.7. Business Activities in visit reporting

At the end of the visit, Business Activities are used to report the results about each single ‘To Do’. These results are stored in specific “answer records” that can be analysed.

3.4. Sales Folder

3.4.1. Description Standard

This module offers a possibility to attach documents (in general: files). These files might be tight to records of other entities, so they can be accessed from there (for example a Produkt-Flyer from product master data).

3.4.1.1. Adding files

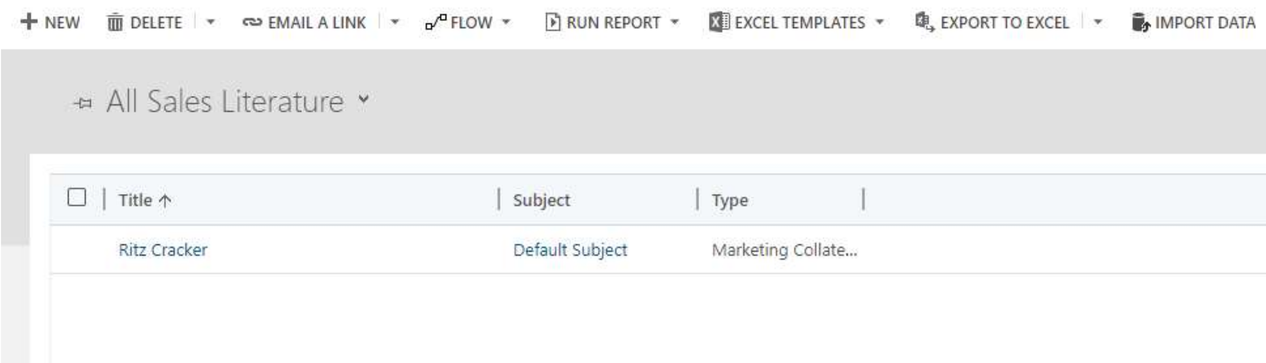


Figure 23: Example for adding files

Sales literature entries can be created within CRM.
If a new record has been created there are some additional steps necessary:

1. Entering data like Title, Subject, Description, etc.
2. Saving the record
3. Adding files (pictures, documents, etc.) via button “+“ in the attachment grid

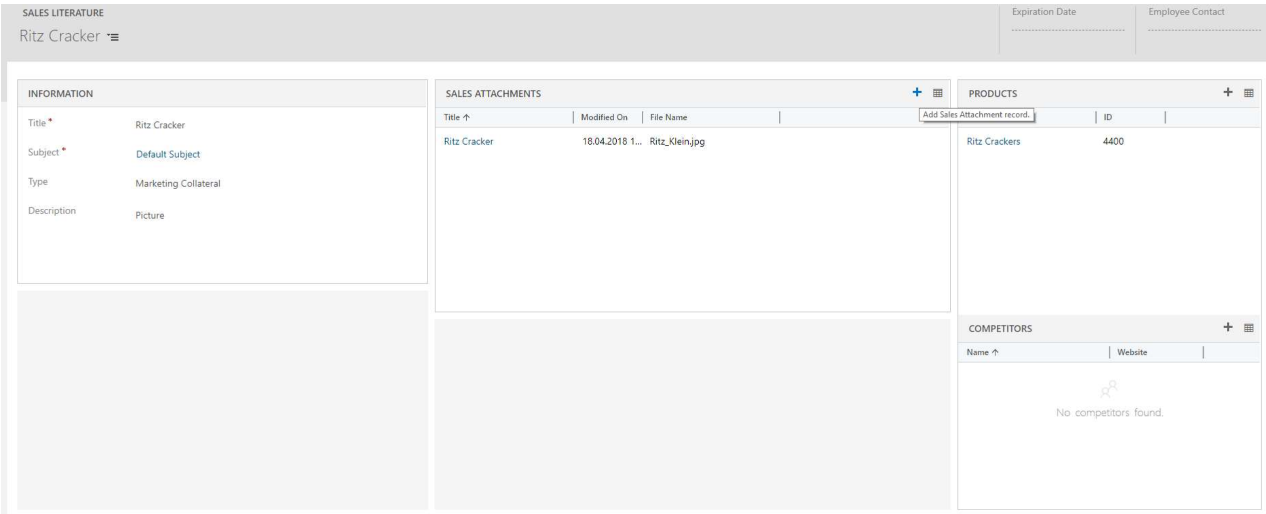


Figure 24: Example for adding an attachment

4. Enter title and start search for the relevant document
5. After having added the file, klick on “Add“
6. Klick on “Save”

3.4.1.2. Sending of documents

Dokuments can be sent within CRM resp. the Mobile Client directly.

3.4.1.2.1. Within CRM

1. Navigate to entry
2. Select "Send as email" from menu

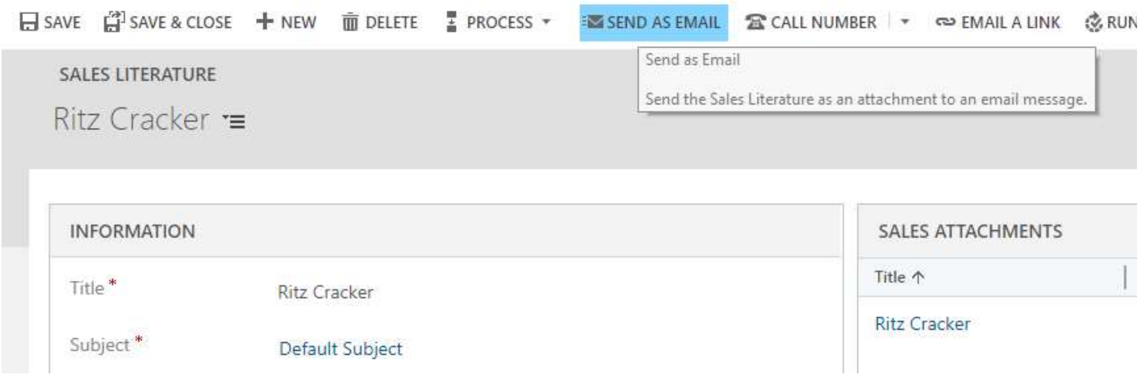


Figure 25: Example how to send from the sales literature entry

3. Fill in data and send email

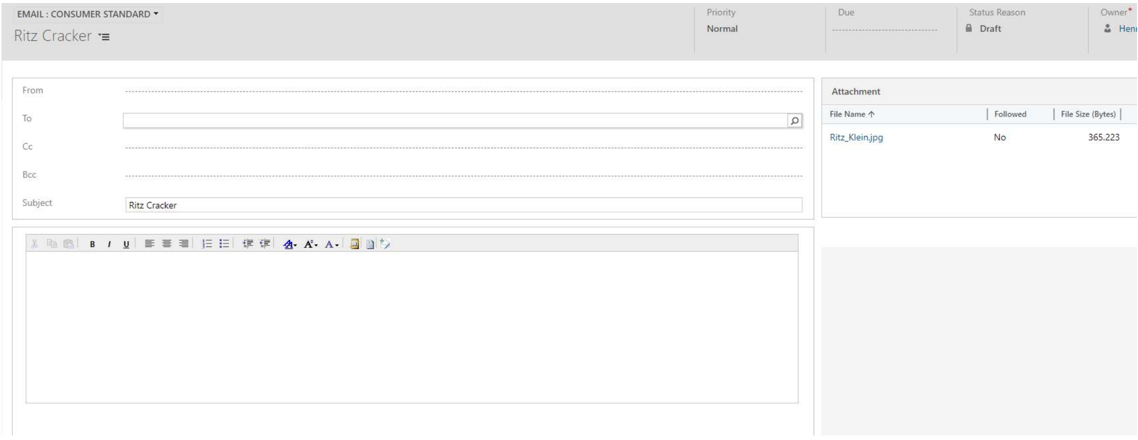


Figure 26: Example email within 365 web for sending sales literature

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3.4.1.2.2. Within Mobile Client

Within the mobile client an attachment can be attached directly to an email. This requires the following steps:

1. Go to Sales Literature
2. Click on "Hamburger menu"
3. Select "Email" from the list

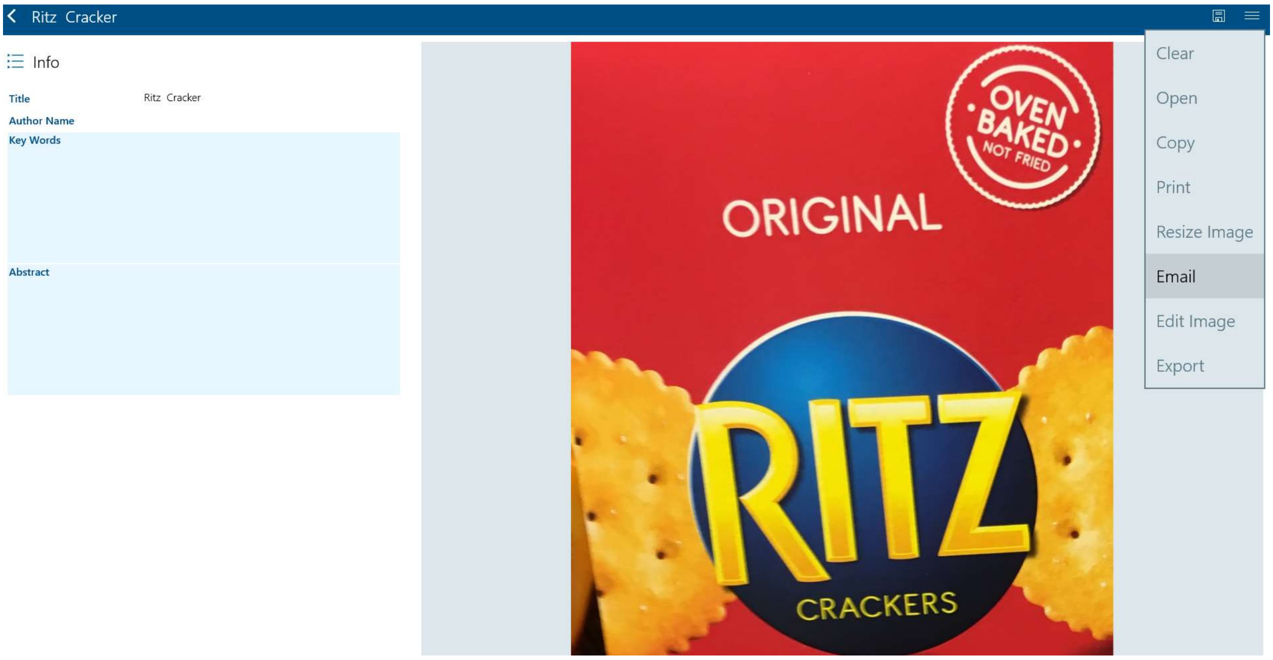

Figure 27: Example to send attachments within the Outlook client

4. Fill in data and send

Figure 28: Example Email created from Sales Literature

5. Field Processes

4.1. Preparation

4.1.1. Visit Planning

4.1.1.1. Standard description

The ORBIS ConsumerONE module “Visit Planning” is used to support especially sales reps in planning visits for the appropriate accounts. Since many sales reps have got many visits per week, the time for this administration activity should be reduced. Visit Planning module therefore allows to create many visits for a week with a few steps.

This chapter uses the terms “Visit” and “Appointment”:

- An appointment could basically be a meeting with anybody at any place.
- Visits shall be appointments with the account at the account’s place.
- When creating a visit in MS Dynamics CRM a standard activity of type “Appointment” will be created. Therefore “visits” and “appointments” are treated similarly.

Planning visits is divided into two steps:

- Show (system created) visit proposals based on:
  - Visit rhythm settings in the specific account OR
  - Business Activities, flagged as relevant for Visit Planning
- Use the visit proposals to create visits in the calendar

This distinction into two steps is as well regarded in the Visit Planning module:

- Visit proposal list
- Calendar

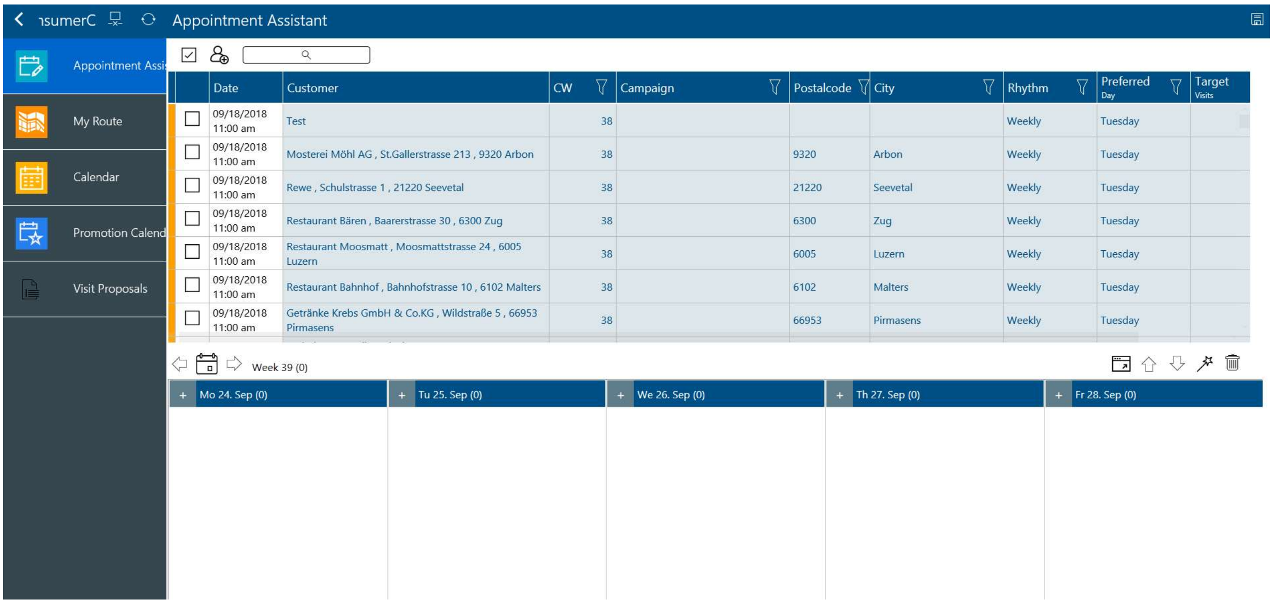

Figure 29: Planning screen of appointment assistant

4.1.1.1.1. Visit Proposal list

The following modes are available in the Visit Planning module to create account related visits:

- Creating visit proposals for accounts according to last finalized visit and visit frequency, specified in account master data. This planning mode regards accounts only having flag “Is plan able” set to “Yes”.
- Creating visit proposals for accounts according to Business Activities (flagged as relevant for visit planning and that may be linked to promotions).

4.1.1.1.2. Appointment Assistant

The Appointment Assistant is split into two parts: the visit proposal list on the top and the scheduling calendar below.
The proposal list shows all existing visit proposals and allows filtering via the column headers like Excel.

Figure 30: Filtering on column header in appointment assistant

The columns may vary depending on the needs in the specific project.

The scheduling calendar can display weeks and also shows calendar entries from the outlook/ system calendar per selected week:

Figure 31: Example for the scheduling calendar

The calendar is always the calendar of the actual user, appointments with its origin in Outlook/ Exchange can be displayed only but not changed/ moved.

4.1.1.1.3. Visit creation

The visit planning module has got the following abilities to create visits from the proposal list:

- Visit creation by using proposed date and time:
    - Accept the date and time in proposal list or modify the date and time.

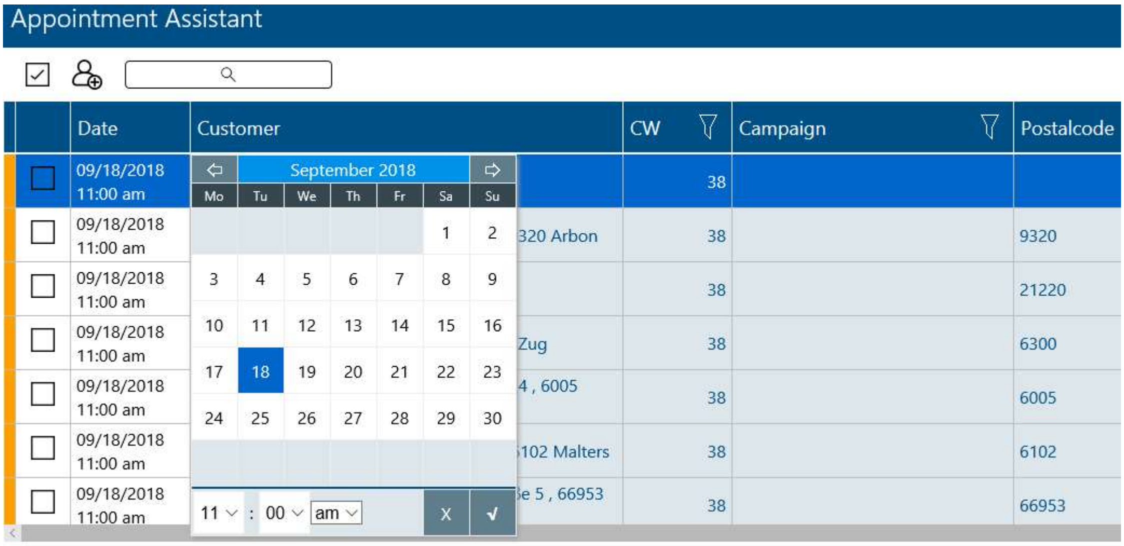

Figure 32: Example for adapting proposed date and time

    - Select one or several records in the proposal list

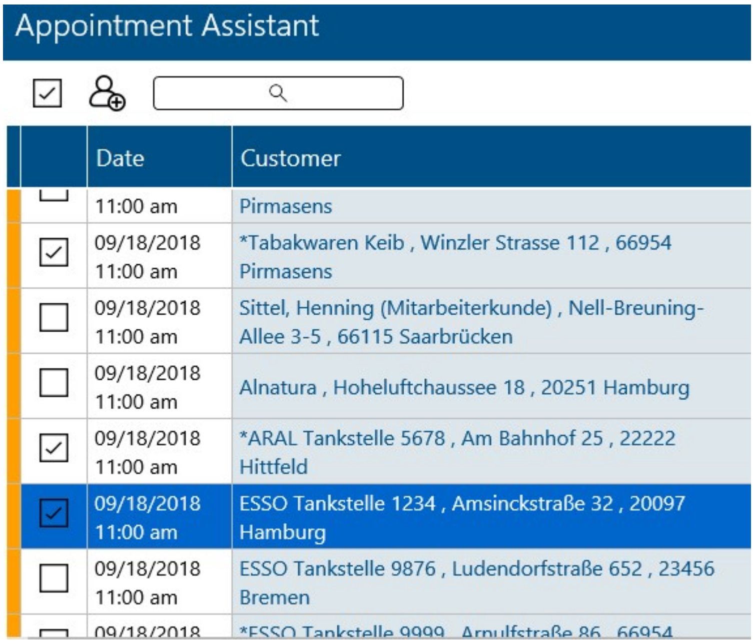

Figure 33: Example for selecting several visit proposals

- Press Save-Button => for each selected record/account in the proposal list an appointment will be created.

Figure 34: Example for appointments created by accepting proposed date and time

Because drag-and-drop is not available/ not working well for touch based systems, we worked on an alternative solution:

- The user
  - selects the proposal from the list
  - clicks on the “+” of the appropriate day
- The system displays the visit (but it is not saved yet)
- The user saves the proposed visits

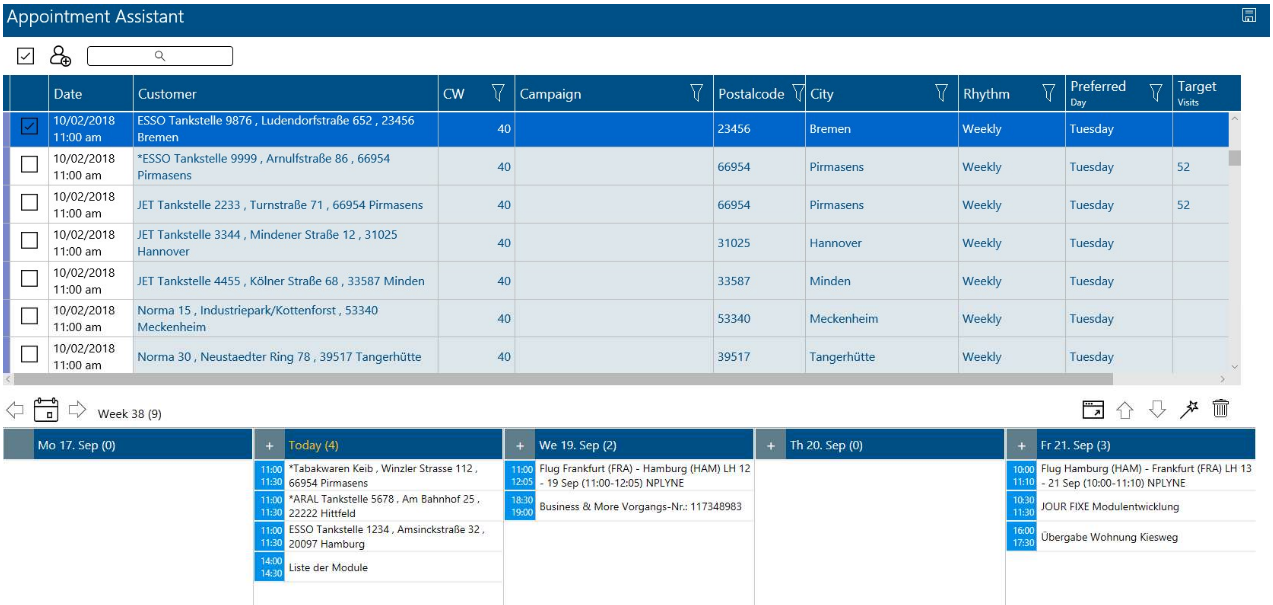

Figure 35: Screen of Appointment Assistant with all functionalities

After having dropped the proposals into the scheduling calendar, the user can move the visits within the day by selecting the appropriate visit and using the arrows in the menu bar.
If there are many visits on the same start time for a day, he can select a visit and use the wand to straighten all following visits with default duration and default time blocks between the visits.
Visits can be deleted if the user has not left the screen.
The Appointment Assistant is available in the mobile environment only!

4.2. Visit Conduction

All processes, relevant for the visit process, can be started directly from within the appointment itself. The user does not need to click and switch.
The ORBIS ConsumerONE provides the following modules to enable these execution processes:

- "Business Activities": When opening an already created visit (apointment), the according Business Activities for the account are preset in a list. The Business Activities are used to lead the sales rep during a visit. After execution of the Business Activity the sales rep gives a feedback directly in the list of Business Activities in the appointment.
- "Order Entry": This module is used for order taking. Order Entry might have a pre-population of listing products and/or promoted products. When creating an order out of the appointment, the account is taken into the order as well as products are preset automatically from account´s relevant listings.
- "Distribution (Survey)": This module is especially used to capture data about the products available in the store. The data to be captured can be:
    - Distributed
    - No. of Facings
    - Consumer Price
    - …

    When creating a survey out of the appointment, the account is taken into the survey as well as products are preset automatically from account´s relevant listings.

4.2.1. Selection Criteria

4.2.1.1. Standard description

The selection criteria offer a possibility to store data related to an account without creating new attributes all the time by customizing. All information available in Selection Criteria are provided by creating data records in the specific entities “Selection Group” and “Selection Attributes” in the background.
The user, working on customer site, just needs to enter data.
If needed these data are available for analysis in the background as well.

4.2.2. Business Activities

4.2.2.1. Standard description

See chapter 3.3.

4.2.3. Order

4.2.3.1. Standard description

This process is used to order goods. ORBIS ConsumerONE provides several adaptations according to the industries needs. The following Order Types are pre-configured:

- Standard Order
- Fast Entering Order
- Promotion Order
- POS Material Order

Orders are usually entered into CRM and then transferred to an ERP system. Therefore, the CRM order entry must not have the same function as the ERP order entry (e.g. availability check or price calculation).
For example, price calculation can be done by sending the order to the ERP directly which calculates the prices giving them back into CRM (but without creating the order physically).
The order's status should be set to "fulfilled" when finished. Then it is not possible to modify the order anymore.
One main feature of order entry in ORBIS ConsumerONE is the automatic preset function for listed products when creating a new order; the user can enter product order data easily according to an MS Excel sheet. The preset functionality depends on the order type.
When opening an existing order, ordered products only are displayed. But the preset logic of appropriate products can be switched on again. It is possible to add products manually, this is needed if:

- The product is not specified in the set of preset products
- Product is available, but there should be several order items having the same product, e.g. 10 units of product A with category "Sales", 2 units of product A with category "For Free".

The definition of "appropriate products to be preset" is different per order type:

- The Standard Order does an presetting of
  - Valid products specified in the assigned listing (of type "listing") AND
  - Valid[2] products specified in linked promotions
- The Promotion Order presets promotional products of the promotion specified in the order header only.
- The POS Material Order presets valid products specified in the assigned listing of type "POS Materials", only.

[2] Valid promotion products must fulfill the condition: Promotions.OrderdateFrom <= SalesOrder.Orderdate <= Promotion.OrderdateTo

4.2.3.1.1. Order Value Calculation

The price is gathered from the price list linked to the order. When creating a new order, the price list field is filled automatically by the price list having the flag “Default”
In the consumer goods standard situation there is one price list only. Therefore, a fixed price list “Standard” is assigned to the order, using the prices specified in this prices list for the products.
Order item categories affect the calculation:

Item category “Sales”: product value is calculated and added to the order total value
Item Categories “For Free …”: A discount of 100 % is applied: The order value is not affected. It is possible to specify different Item Categories “For Free” with the same affect in order value calculation.
Item Category “Return”: The order value of this item reduced the orders total value.

It is possible to enter manually a discount per order item, when item category = “Sales”. The discount is considered in order value item level and on header level.
It is possible to enter manually a discount on order header level. This discount is considered on order value header level only.

4.2.3.1.2. Requested delivery date

The user can request a specific delivery date. This requested delivery date cannot be a weekend (Saturday and Sunday) or a national bank holiday specified in MS Dynamics CRM module “Business Closures”. The preliminary lead time can be defined specifically per account. It is set when creating a new order and it is validated by the system when a date entered below this date.

4.2.3.1.3. Line item Count

When saving an order, the number of order items are calculated and saved in the order header.

4.2.3.1.4. Availability check

ORBIS ConsumerONE does not maintain quantities on stock level and does not regard quantities on stock in its standard (subject to project specific adaptation). But in case that a product is not available at all at the moment, it is possible to maintain in product master data the date when a product will be available again.
This information can be considered in order entry, showing a coloured marker or a symbol (Resco only)
Example: In case that the product’s availability date is before the requested delivery data of the order, a green bar indicates that the product availability date is before requested delivery date of the order.

The products in the order entry grid are sorted as follows:

- Promoted products appear on top (according to Promotion Name)
- Sort number, defined in the promotional product:

4.2.3.1.5. Product number

The product number is gathered from the Product Master Data. Typically, these data are delivered by interface from the ERP system.

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4.2.4. Survey

4.2.4.1. Standard description

The Distribution module is used to capture any product related information checked in the POS. Therefore, it is a very important instrument in the consumer goods industry. The distribution module has got the purpose to

- Check the availability of products in the POS (Distribution)
- Capture the consumer price of the products
- Check compliance of product situation vs. planned in listing agreement.
- Capture competitor product situation
- Capture the shelf share in the store.

4.2.4.1.1. Distribution header

When creating a new distribution the following data need to be provided:

- Account : This is the POS where the distribution is captured
- Distribution Type: this is the type of the distribution. It indicates which set of products will be preset/displayed when creating a new distribution: The following types are available:
- Slotted Products[3]: This are the products specified in the listing of type "Listing" assigned to the account. They are marked with a blue line
- Focus Products[4]: These are the products specified in the listing of type "Focus Products", assigned to the account. They are marked with a yellow line.
- Slotted and Focus Products: Products of assigned listings of type "Focus Products" and of type "listing".

The following fields are preset:

- The field "Date" is preset by actual system date.
- The field "Name" is preset by name of the account and actual date

4.2.4.1.2. Common features about distributions

Distribution records can modified on the day of creation only. It is not possible to create more than 1 distribution per account, day and distribution type.

[3] „Slotted Products“ are defined in Listings of type „Listing“: These are products planned centrally to be available in the store, to be sold to the consumers.

[4] Focus Products: Focus Products are mainly specified by marketing department, to get a feedback about the important products only. Important products can be "own" products, but as well "competitor" products. Using the focus products feature have as well the advantage to reduce the workload of survey taking on relevant products only.

4.2.4.1.3. Distribution Details

In the ORBIS ConsumerONE standard the following data can be captured per product:

- Facings
- Consumer Price
- Distributed
- Out Of Stock
- Allignment of the in the shelf
- Shelf location

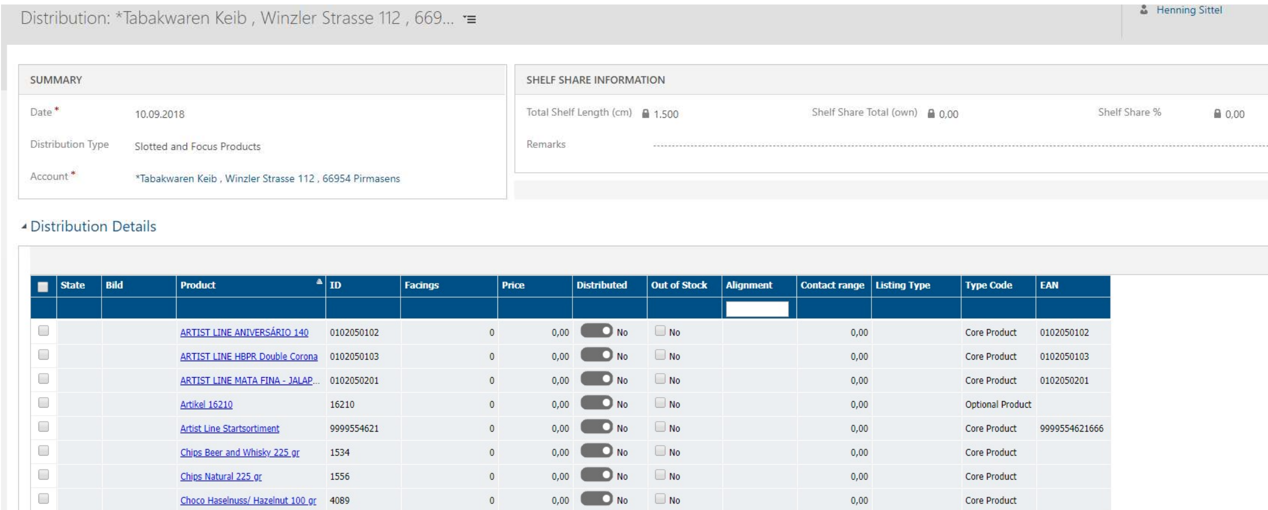

Figure 36: Distribution Detail: Capture product related information

4.2.4.1.4. Features about distribution details

When opening the grid, products are preset according to the definition of “Distribution Type”:

- Slotted products
- Focus products
- Slotted and focus products

in case that an appropriate listing is assigned to the account.
The fields to be entered per surveyed product can be preset by historical values from previous survey with the same survey type at this account.
When saving the distribution details, the software checks whether there is any product that has got “Distributed” = “No” and that is specified in the listing as “Core Product”. Then the field “Distribution Issue” in account master data will be set to “Yes”. If all products are distributed, then “Distribution Issue” will be set to “No”.
This information in account master data shall be used in visit planning module to select on accounts having distribution issues.

Field “Contact Range”: This field cannot be entered manually. This field is calculated by Facings * Measurements specified in product master data. The setting “Alignment” in Distribution Detail is considered:

When set to “On Edge”: Contact Range = Facings * Width
When set to “Alongside”: Contact Range = Facings * Length

The field “Alignment” is preset by historical value or alternatively by default value of the option set.

Figure 37: Product Master data: Measurements used for shelf share calculation

4.2.4.1.5. Shelf Measurement

Shelf Measurement is a rather new functionality within the ConsumerONE and fully supported in the mobile application only.
It provides aggregated data about shelf KPI like listing quote or surveying rate per product group. Therefore, the sales rep has to maintain some detail data per product group once in an initial visit; these data are used for each follow up created survey and shelf survey with the possibility to adapt if needed.

Figure 38: Example for shelf survey, calculating certain aggregated figures on product hierarchy level.

The system can compare calculated values to historical values and can give a hint about the trend.
It is also possible to aggregate these data along the product hierarchy using the preconfigured five levels:

Resco Mobile CRM

Distribution

Select Hierarchy Level: Brand / Sub Brand / Segment / Sub Segment / Product Segment

Level	rod.	Survey prod	List.-prod.	Survey rate	Surv.-trend	List rate	List.-trend	SL tot.(cm)	SL Fac.(cm)	SL rate	SL trend	No Fac
	197	0	18					495,0	0,0			0,0
LM Fette/ Greases	19	0	0	0,0		0,0		33,0	0,0	0,0		0,0
Motorenöl/ Engine oil	8	0	0	0,0		0,0		13,0	0,0	0,0		0,0
Getriebeöl/ Gear oil	6	0	0	0,0		0,0		18,0	0,0	0,0		0,0
Milchprodukte/ Milky products	0	0	0	0,0		0,0		0,0	0,0	0,0		0,0
Dinone	25	0	0	0,0		0,0		23,0	0,0	0,0		0,0
Cigarren/ Cigars	40	0	8	0,0		20,0	→	83,0	0,0	0,0		0,0
Cigarillos	27	0	8	0,0		29,6	↗	68,0	0,0	0,0		0,0
Filter Cigarillos	38	0	0	0,0		0,0		55,0	0,0	0,0		0,0
Longfiller	0	0	0	0,0		0,0		0,0	0,0	0,0		0,0
Shortfiller	0	0	0	0,0		0,0		0,0	0,0	0,0		0,0
Merchandising	5	0	0	0,0		0,0		32,0	0,0	0,0		0,0
Advertising	10	0	0	0,0		0,0		51,0	0,0	0,0		0,0
Erdal	7	0	0	0,0		0,0		15,0	0,0	0,0		0,0
Frosch	NaN	0	0	0,0		0,0		0,0	0,0	0,0		0,0

Info Notes Distribution Positions ShelfSurvey Charts

Figure 39: Example for data aggregation in the shelf survey.

All KPI can also be visualized in a graphical way:

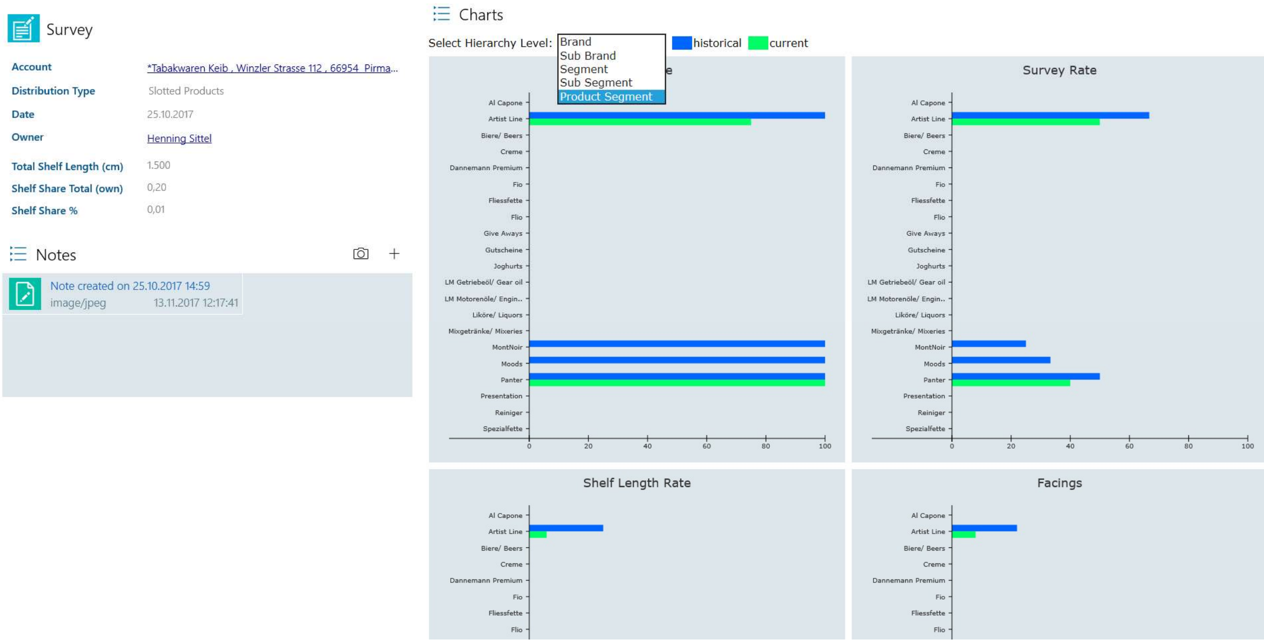

Figure 40: Example for graphical visualization of shelf survey data

4.3. Visit post-processes

4.3.1. Daily Report

4.3.1.1. Standard description

The Daily Report module is not part of the Core standard. ORBIS has an Add On that be used to give a possibility to the user to see a summary of the day what he has done. On the screen he can see:

- Appointments of the day
- Orders created on the day
- Surveys created on the day

It is also possible to provide attributes to store details about the daily working hours and also about the daily mileage.
In terms of standard, the user will create every morning a new Daily Report. When creating a new Daily Report, the actual day and the actual user are preset automatically. Furthermore, the start-km field can be preset automatically by the previous day end-km value. The name field should be preset or filled by a work-flow.

6. Analytics

ORBIS does not provide a standard analysis model anymore because it is not possible to provide a standard that covers all the different needs across ORBIS´ customers. Therefore, we recommend to use PowerBI with individually adapted analytics that may be available also in the mobile client when using it with an existing data connection (WiFi or LTE).

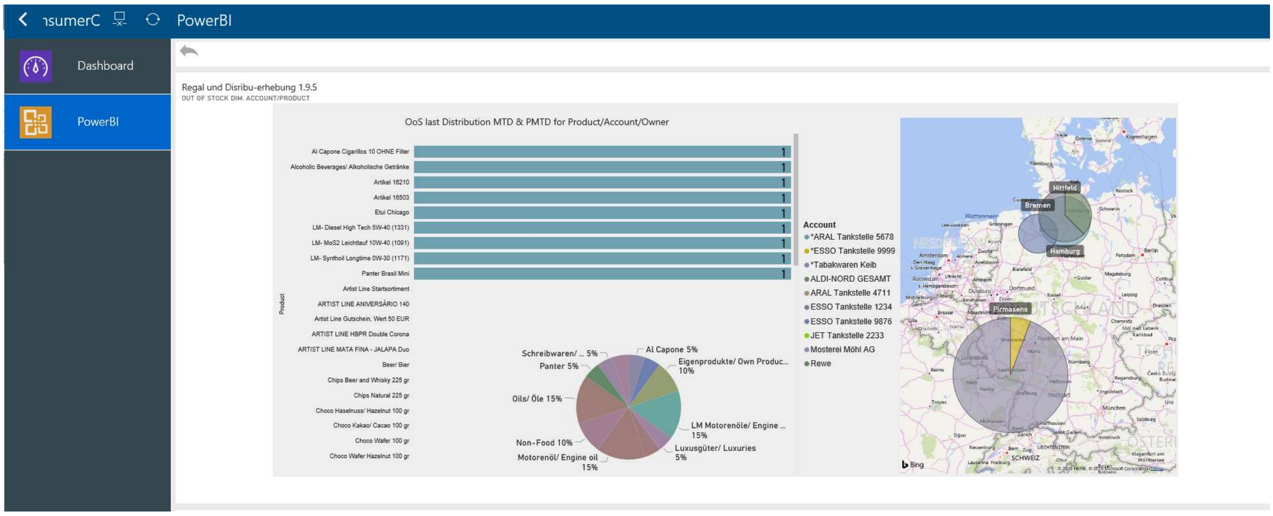

Figure 41: PowerBI integration in mobile solution (offline usage with online PowerBI using existing WiFi or LTE)

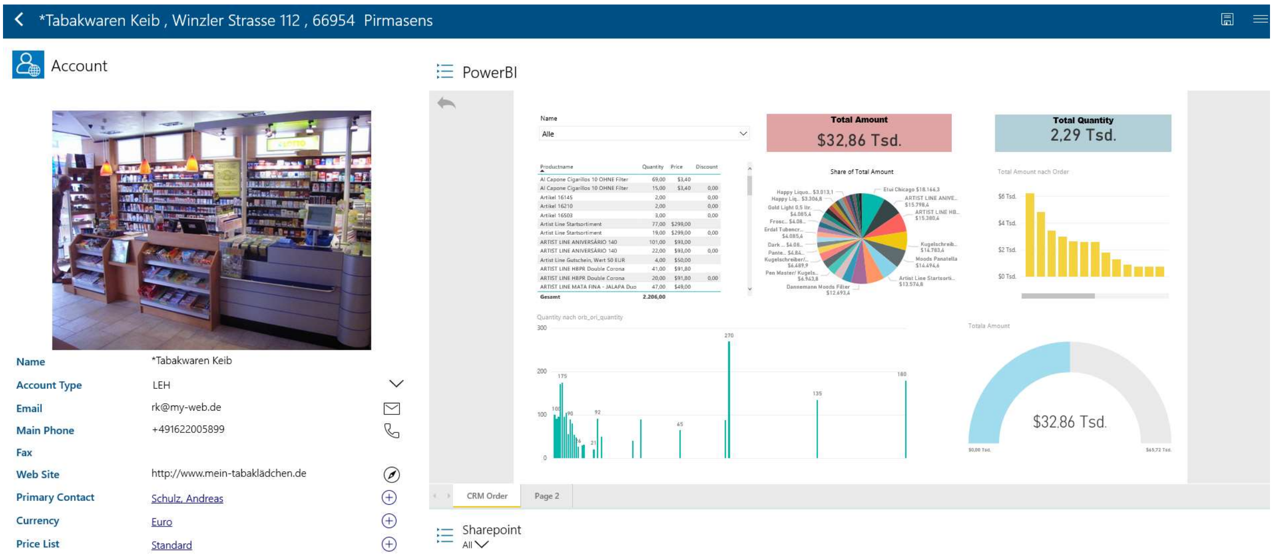

Figure 42: Example of Power BI integration directly in account record (with restriction to account level)

For offline purposes we are able to offer offline reports on the mobile device; in this case the data need to be prepared for this approach (pre- calculated or aggregated etc. and stored in specific entities in CRM).

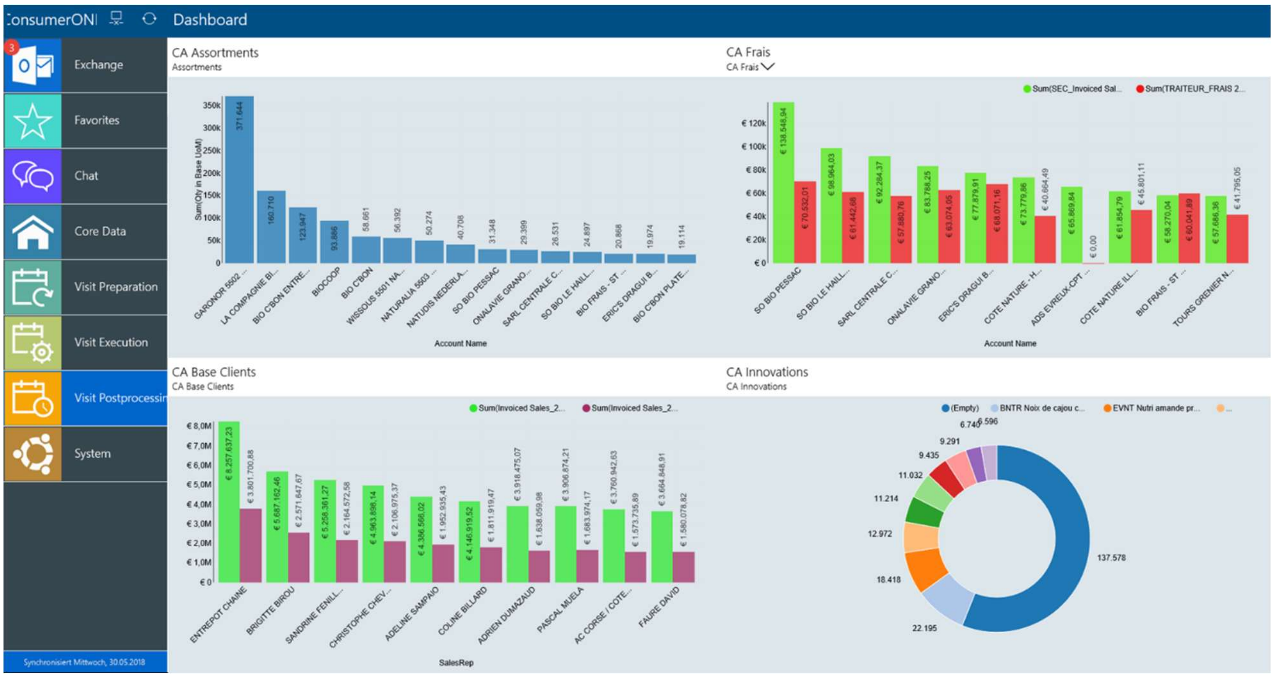

Figure 43: Example for mobile offline reports

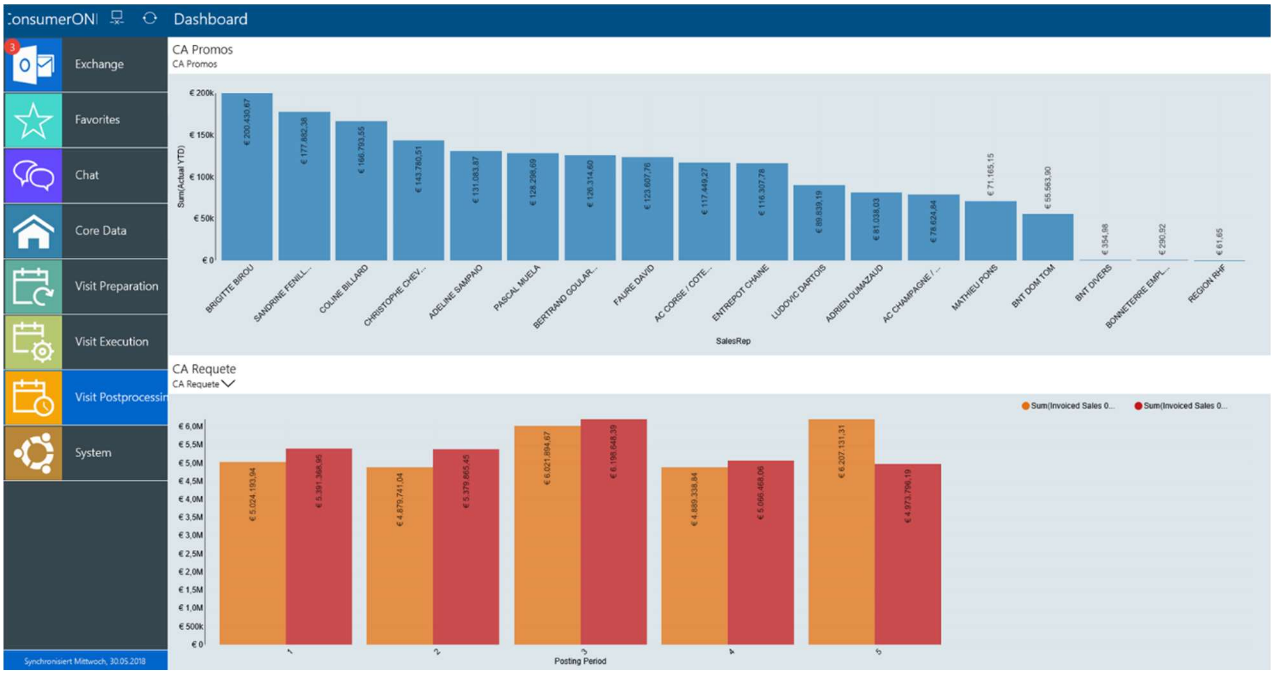

Figure 44: further example for offline mobile reports

7. Figures

Figure 1: Example SiteMap CRM classic mode 2
Figure 2: Example for sitemap in Unified UI in CRM 2
Figure 3: Example Account overview 3
Figure 4: Example for Mobile sitemap 4
Figure 5: Different parts of the security model 5
Figure 6: Example for simple structure 6
Figure 7: Example for assignment of users to a certain business unit 6
Figure 8: Example for business unit depending assignment of security roles 7
Figure 9: Example for access levels of a seucirty role 8
Figure 10: Example for access check depending on security role assigned 9
Figure 11: Example for access definition within a security role 9
Figure 12: Access levels within a security role 10
Figure 13: Example Classic UI 13
Figure 14: Example of Unified UI 13
Figure 15: Mobile view of account 14
Figure 16: Example Product hierarchy 17
Figure 17: General entry screen “Listings” 20
Figure 18: Listing Screen “Members in listing” 21
Figure 19: Listed products 22
Figure 20: Screen “Header data in Promotions” 25
Figure 21: Promoted Product specification 26
Figure 22: Example for calculation based on weighting factors 29
Figure 23: Example for adding files 30
Figure 24: Example for adding an attachment 30
Figure 25: Example how to send from the sales literature entry 31
Figure 26: Example email within 365 web for sending sales literature 31
Figure 27: Example to send attachments within the Outlook client 32
Figure 28: Example Email created from Sales Literature 32
Figure 29: Planning screen of appointment assistant 34
Figure 30: Filtering on column header in appointment assistant 34
Figure 31: Example for the scheduling calendar 35
Figure 32: Example for adapting proposed date and time 35
Figure 33: Example for selecting several visit proposals 36
Figure 34: Example for appointments created by accepting proposed date and time 36
Figure 35: Screen of Appointment Assistant with all functionalities 37
Figure 36: Distribution Detail: Capture product related information 43
Figure 37: Product Master data: Measurements used for shelf share calculation 44
Figure 38: Example for shelf survey, calculating certain aggregated figures on product hierarchy level. ... 44
Figure 39: Example for data aggregation in the shelf survey 45
Figure 40: Example for graphical visualization of shelf survey data 45
Figure 41: PowerBI integration in mobile solution (offline usage with online PowerBI using existing WiFi or LTE) 47
Figure 42: Example of Power BI integration directly in account record (with restriction to account level). 47

Figure 43: Example for mobile offline reports 48
Figure 44: further example for offline mobile reports 48