Demo Script
An Introduction to SAP Business ByDesign
Classification: Internal and for Partners

Version: 20171218
Disclaimer

This demo script is based on the ByD Reference System for the Almika model company. There are several country versions of the Almika ByD implementation available. The content is similar but deviates especially with respect to language support, names and object descriptions. Sample data used in this demo script relates to the US country version – for other country versions different data samples might be relevant.

A prerequisite for being able to fully understand this demo script and run the demo, is a sound system knowledge on SAP Business ByDesign. General assumption is that you are familiar with the Learning Center content available in your ByD system at: Home Self-Services – Learning Center.

Although the script has been tested carefully you might nevertheless encounter different system behavior when running a demo in an actual Almika demo tenant.

Release Statement

This version of the demo script is released for the following country versions of the ByD Reference System for the Almika model company:

- US – United Stated, as of demo release ByD 1705
- DE – Germany, as of demo release ByD 1705
- UK – United Kingdom, as of demo release ByD 1705
- FR – France, as of demo release ByD 1705
- AT – Austria, as of demo release ByD 1705
- CH – Switzerland, as of demo release ByD 1705
- NL – Netherlands, as of demo release ByD 1705
- CA – Canada, as of demo release ByD 1705
- MX – Mexico, as of demo release ByD 1705
- AU – Australia, as of demo release ByD 1705
- CN – China, as of demo release ByD 1705
- IN – India, as of demo release ByD 1705

The demo release basically is determined by the time when the demo tenant has been provisioned for demo usage, a demo tenant provided between mid of March and mid of June 2018 is part of the demo release ByD 1802.

As of demo release ByD 1802 the release status of your ByD demo tenant can be identified in the Company-Specific-Help: You can find a help entry “ByD <nnnn> Demo Guides <CC>” under Help – Company-Specific-Help. <nnnn> specifies the demo release of your ByD demo tenant, e.g. ‘1802’ – released in February 2018. <CC> specifies the country version of your demo tenant, e.g. ‘US’ – Almika US country version. The version-controlled demo guides provided in this help entry match to the demo release and the country version of your ByD demo tenant. Please be aware that the demo guides are not specific to the country version, only the version of the demo guide is specific to your ByD demo tenant.
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1 Demo Script Overview

1.1 Demo Overview

1.1.1 Demo Focus

This demo script outlines the highlights of SAP Business ByDesign and shows you how to demo these capabilities along with their benefits and how to deliver proof of these value propositions in your demo.

In this demo, you will introduce general features of SAP Business ByDesign and demonstrate these features in the areas of business analytics, and self-services. You will show typical key features of ByDesign and explain to the end user how they can leverage these built-in features to best meet their particular business requirements and how adapt them, if necessary, to allow them to get the most efficient use out of the system.

The key features that are part of this introduction will help to prove the value statements that you will make and are also the foundation for other more specific demos, as they all circle around ByDesign’s product key features of Transparency, Adaptability and Efficiency, which, in turn, lay the foundations of Profitability and Growth, which are the main pillars of any business.

Why does the demonstrated solution differentiate SAP from the competition (SAP strengths and competitor weakness)?

SAP’s strength is a fully integrated source of truth for all professionals using the solution. Information from CRM is leveraged to efficiently move Leads into Invoices with speed, accuracy, and consistency. Other solutions cannot match the adaptability of ByDesign. ByDesign requires no custom integration work to use your existing infrastructure to create end to end procedures.

1.1.2 General Introduction

Obviously, no introduction of SAP Business ByDesign is complete without an initial general introduction to SAP and its commitment to both large and SME enterprises. Here are some general concepts and keywords that you should include in an introduction to SAP Business ByDesign.

- SAP’s role as a leading enterprise software provider and its commitment to companies of all sizes
- SAP’s commitment to the customer’s industry (outline the range of industries that SAP covers)
- Integration of SAP ByD with SAP business suite in large enterprise scenarios – industry leading so-called 2-Tier integration scenarios
- Prominent names and success stories from ByDesign customers
- Affordability – to refute the myth that SAP is only for large enterprises and is too expensive – use the fact that over 80% of SAP’s customers are in the SMB space!
- Rapid time to value – average implementation time of ByD is 2 to 3 months

You may, for example, want to point out that SAP’s best practices for success are based on the immense experience gained in over 100,000 customer implementations.

1.1.3 Introduction to SAP Business ByDesign – General Theme

When you give an overview of SAP Business ByDesign, it is essential that you elucidate your audience about the overall value propositions of this solution with regard to the guiding principles of running an enterprise, that is, Profitability and Growth.

In your demo, focus on the strengths of ByDesign and show how the solution supports the principles of growth and profitability by providing

- Transparency
- Efficiency
- Adaptability
So, each of these features and capabilities is ultimately linked to and in one way or another supports the ultimate principles of **Profitability** and **Growth**.

- To provide some proof of the transparency that ByDesign offers, you will demo embedded analytics and full document flow. You will point out that this helps to make better business decisions to improve profitability.
- To demonstrate how ByDesign boosts efficiency, you can show how SAP has integrated best practices into the system, which includes the integrated business task management, and which helps to improve collaboration and control of your transaction flows. This efficiency concept addresses both profit and growth.
- Always use in your ByDesign demos at least one of the standard available mobile apps (like Business In Focus, Project Cockpit or Manager Approval). This will add the important “wow” factor in your audience!
- To provide evidence of the adaptability of ByDesign, you can explain how you can implement the parts of the system you need today and add more functionality later. Point out that you can also configure the system to tailor the best practices to your environment and demonstrate that each user can personalise the system to meet their specific needs. Again, adaptability helps customers to streamline operations, so that they can address both improving profitability and configure the system for different needs as they grow.

### 1.2 Intended Audience

**SAP internal:**
- Pre-Sales Executives, Pre-Sales Solution Advisors
- Solution Sales Specialists
- SAP external: CEO, CIO, Sales Management

### 1.3 Protagonists

In this demo, Catherine Kennedy-Woods, a CEO of the reference company (ALMIKA) guides you though a day in her life as chief executive of the company.

### 1.4 Business Pain Points

Line-of-Business executives need a tailored dashboard to manage the business by with the ability to drill down into details and generate tasks across the organisation. Many of our prospects are unable to do this today due to the following issues:

- Disparate systems with limited integration do not provide a common platform for managing the business. Many times Excel supports key business processes.
- Reporting is difficult with different reporting tools for each of the disparate systems. In many cases they must manually consolidate information in Excel from these disparate systems. The reporting tools of the past were difficult to use without significant technical experience.
- Training new employees is quite difficult because processes are ill defined.
- The 24/7 economy requires a constant view on your business readily available from any device or location
1.5 Key Messages and Value Proposition

By leveraging information gathered in the Sales process, ByDesign enables users to quickly develop Project Plans, Quotes, and Invoices. ByDesign processes Sales and Services information effectively to help Sales and Service Professionals quickly generate revenue.

Overview

A common ByDesign theme includes high level business goals to improve profitability, and build a foundation for growth, and adopt best practices across the entire enterprise. To support these goals ByDesign provides Transparency, Efficiency, and Adaptability, as well as an integrated solution to support a two-tier enterprise.

Key Features and Associated Benefits

- **Transparency** / Keep a robust audit trail on transactions, postings, purchase requests, and processes
  - Confidently Disclose, Minimise Liability, Easily Communicate Business Process to New Hires
- **Efficiency** / Share information with ease
  - Increased collaboration, productivity, and sharing drives innovation and reduces the amount of time gathering information.
- **Adaptability** / Without any programming ByDesign users can connect PDF, MS Excel, mashups and web services to streamline the ease of access to information.

1.6 Story Flow Summary

This demo is an introduction demo and does not show an end-to-end process but rather takes you through some of the key features of ByDesign. By exercising this Golden Demo and exploring the possibilities for example by trying out other reports, use other customer data and by personalising the HTML5 screens, you will quickly be able to tell your prospect a ‘tailor-made demo story.

In the first part, which shows both the easy to expand Launchpad and the Home page and some central features in Business Analytics, you will outline:

- Adaptability of the view options and other personalisation features on the Home page.
- Transparency provided by adaptable view and navigation options
- Different adaptability features for reports (different key figures, pivot concept for different table layout)
- Bi-directional MS Excel integration
- Access to Accounting information such as the journal entry
- How to get overview information and details on sales orders and accounts

The second part focuses on the built-in Business Task Management and includes the following activities:

- Send a business task to a colleague
- Using Web Services
The last section of your demo deals with Self-Services in ByDesign.

- Providing a quick **Self-Services** overview
- Giving a short **Learning Centre** overview, including an e-learning example.

## 2 Technical Requirements

SAP Business ByDesign can be accessed from any browser on any device – thanks to its HTML5 user interface which is “device agnostic”. Experience in the (demo) field shows that HTML5 performs better, smoother when using Chrome browser on your (windows) laptop or iPad. One drawback of Chrome is that you will not be able to integrate MS-Excel with ByDesign (1611). On Windows 10 using the newest Microsoft Edge browser works fine too – including the MS-Excel integration.

### 2.1 Prerequisite

To be able to show the bi-directional integration with Microsoft Excel while using ByDesign in your Internet Explorer browser, you must have installed the **Plug-in for Microsoft Excel**, which you can find in the Self-Services Overview of your ByDesign system (WoC Home → Self-Services Overview).

NOTE: this Add In will only work in the MS-Internet Explorer browser on a Windows (7, 8, and 10) PC/laptop or MS-Edge on Windows10.

Scroll down to the section **My Computer** and click **Install Additional Software** in the section **My Computer**.

Another browser window will popup in which you can select which additional software to install. Choose to install the SAP Add-In for Microsoft Excel.
Click the blue arrow, and click the “Run” button in the popup window which will execute the installation of the latest version of the ByDesign addin for Excel.

When this add-in is successfully installed you will see a new tab called “SAP BUSINESS BYDESIGN” in the ribbon of MS-Excel:
You can either install more Additional Software or simply close the popup browser window.

### 2.2 System Access Information

To run the demo, you need access to a ByD demo tenant for the Almika model company, which is available in different country versions.

### 2.3 User Accounts

The following user accounts for ByD Almika implementation are to be used to run the demo:

<table>
<thead>
<tr>
<th>Predefined User ID</th>
<th>User Name</th>
<th>Password</th>
<th>Component</th>
</tr>
</thead>
<tbody>
<tr>
<td>CEO01</td>
<td>Catherine Kennedy-Woods</td>
<td>Welcome1</td>
<td>SAP Business ByDesign</td>
</tr>
</tbody>
</table>

### 3 Demo Steps

#### 3.1 Focus on Business Analytics

##### 3.1.1 Home Page Personalisation

**What to say**

**Introduction**

You're logged on to ByDesign as Catherine Kennedy-Woods and are initially landing on the Launchpad. This is a screen which can be highly tailored to personal needs by the user. Examples include adding new tab strips, adding/removing favourites (tiles) but also changing the background colours or names of screen views and tiles.

Explain the use of My Launchpad:

- Easy drag and drop of tiles onto it
- Grouping and naming tiles allowing for personalisation
- Adding groups
3.1.1 Home Page Personalisation

Clicking the top left three lines opens the workcenter navigation on the left of the screen. From here open the ByDesign Home page. Note that you can open as many other views/screens in one login session.

Catherine has personalised the layout of her home page to meet her particular job requirements as a chief executive officer. This means she has set up business analytics on this page so she can see the developments and figures she’s most interested in as soon as she logs on. The reports on her home page include, for example:

- Profit Analysis by Company
- Total Spend per Spend Category
- Cost Centres – Plan/Actual
- (Home Quick Links)
- (My Top Worklist)

Key Features and Advantages

- Adaptability of your Home page (embedded analytics, worklist, quick inks, etc.)
- Over 500 embedded analytics (reports, dashboards, KPIs) are available in ByDesign out of the box
- Different view options for each of these reports (charts, tables, or both combined).
- Reports can be viewed on any device
- Reports can be adjusted to own needs (Note: use the Business In Focus app to showcase this)
What you Should See

Initial Launchpad screen after login:

Click on the top left three lines to open the workcenter navigation:

Click Home. Scroll to see more content. By clicking the top left three lines you can hide the left side workcenter overview.
3.1.1 Home Page Personalisation

Scroll down, example of Home screen

3.1.2 Adaptable View Options from the Home Page

What to say
3.1.2 Adaptable View Options from the Home Page

Introduction

Today, Catherine is interested in profitability for a specific customer. So, she begins by drilling down into the profit analysis by company report to view the details.

Key Features and Advantages

- Different view options for a report (charts, tables, or both combined)
- Adaptability of reports to suit specific business requirements by adding or removing key figures / filters from your report
- Adaptability of display and content: the end user, without programming, can change or modify a report to create new views
- Rapid response time of reports through in-memory analytics (leveraging the SAP HANA architecture underneath of ByDesign)

Value Statement

Every employee has unique objectives and different perspectives when it comes to Reporting and Analytics. ByDesign allows a user to easily adapt the solution to give them instant and meaningful insight.

What to Do

Work centre Home

- Scroll to the Profit Analysis - Company report. Click on the wheel icon, click Actions \(\rightarrow\) Analyse Data

A new screen is opened (indicated here with the green oval. Click the table icon. This shows the profit analysis in a tabular format.)
3.1.2 Adaptable View Options from the Home Page

- Play around with the several display options (graph, table, combinations) to show the different display options for a report.
- In the report table, click on the context menu of **Net Sales Revenue → Profit Overview by Key Figure.**
3.1.2 Adaptable View Options from the Home Page

<table>
<thead>
<tr>
<th></th>
<th>Fiscal Year</th>
<th>2015</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Sales Revenue</td>
<td>* 1,000</td>
<td>9,769.44 USD</td>
<td>5,187.85 USD</td>
</tr>
<tr>
<td>Profit Overview by Key Figure</td>
<td></td>
<td>221.82 USD</td>
<td>2,308.81 USD</td>
</tr>
<tr>
<td>Profit Detail by Contribution Margin Scheme</td>
<td>547.62 USD</td>
<td>2,879.04 USD</td>
<td></td>
</tr>
<tr>
<td>Income from Operations</td>
<td>* 1,000</td>
<td>3,694.79 USD</td>
<td>1,811.49 USD</td>
</tr>
</tbody>
</table>

A new screen is opened (indicated with a blue box in the screenshot below). You can switch the report view to a table as suggested here with the green oval.

To enlarge the report click the icon in the red box which hides the left-side filter section – hitting the filter icon (red box in next screenshot) again will show the filter settings again.
3.1.2 Adaptable View Options from the Home Page

Again, switch from the graphical to the table view.

Now show how easy you can add information into the report – by clicking on the + signs on the right of the report – this enables you to select additional key figures which are currently not shown but which are available. You can select to add different information categories in either the rows or columns on the report. It is very easy to switch. Try to add the Customer info into the Row:

The result is then as follows:
### 3.1.2 Adaptable View Options from the Home Page

By clicking the “Row” button again you can either remove the Customers, add another dimension, like adding the Product. Tell your audience how easy it is to change the information in this profit analysis report. The CEO in this case can detail exactly what is needed. This reporting behaviour is available throughout all reporting and analysis in ByDesign.

Now let’s use some filtering on the Profit Analysis report which currently shows the net revenue, gross profit etc. across two fiscal years showing which customers we sold our products to:

#### Profit Analysis - Company

<table>
<thead>
<tr>
<th>Customer</th>
<th>Fiscal Year 2015</th>
<th>Fiscal Year 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Electronic Technologies</td>
<td>1,200</td>
<td>1,200</td>
</tr>
<tr>
<td>Shoorah Wholesale Co</td>
<td>1,200</td>
<td>1,200</td>
</tr>
<tr>
<td>Not assigned</td>
<td>#</td>
<td>#</td>
</tr>
<tr>
<td>Result</td>
<td>1,200</td>
<td>1,200</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Customer</th>
<th>Fiscal Year 2015</th>
<th>Fiscal Year 2016</th>
</tr>
</thead>
<tbody>
<tr>
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<td>1,200</td>
<td>1,200</td>
</tr>
<tr>
<td>Not assigned</td>
<td>#</td>
<td>#</td>
</tr>
<tr>
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<td>1,200</td>
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<td>#</td>
<td>#</td>
</tr>
<tr>
<td>Result</td>
<td>1,200</td>
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<td>1,200</td>
</tr>
<tr>
<td>Not assigned</td>
<td>#</td>
<td>#</td>
</tr>
<tr>
<td>Result</td>
<td>1,200</td>
<td>1,200</td>
</tr>
</tbody>
</table>
3.1.2 Adaptable View Options from the Home Page

- Click the left button show the filter icon:
- Click the Filter Icon which will help the CEO to filter more specifically. (* you may have to clock the Availability indicated with the red box in this screenshot. After making your filter selections hit the Apply button indicated in green oval *)
3.1.2 Adaptable View Options from the Home Page

**View:** Profit Analysis - Company (modified)

**Selected**
- Product:
- Customer:
- Fiscal Year:

**Available**
- Accounting Period/Year:
- Calendar Year/Month:
- Calendar Year/Week:
- Company:
- Contribution Margin Scheme:

![Apply Button]
3.1.2 Adaptable View Options from the Home Page

- Under Selected click the Customer input help and select a customer staring with CS (like CS200123 Unlimited electrics). Also make a selection on the accounting period which you want to be used – for example clicking the last 5 months. Then hit the Apply button. **Period/Year, actual period**, click OK.

- Move the key figure Project to the Rows field, so that you can see the profitability of this customer by projects. Catherine has –without programming- and in just a few seconds, designed a specific report that gives her information about this customer, and their revenue, cost of goods profitability and income from operations.
3.1.2 Adaptable View Options from the Home Page

What you Should See

Profit Analysis by Company report

![Report: Profit Analysis - Company](image)

<table>
<thead>
<tr>
<th>Product</th>
<th>Customer</th>
<th>Project</th>
<th>Fiscal Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>S251016</td>
<td>Computer Equipment Installation</td>
<td>CS20123</td>
<td>2016</td>
</tr>
<tr>
<td>S251016</td>
<td>Repair</td>
<td>CS20123</td>
<td>2016</td>
</tr>
<tr>
<td>S251021</td>
<td>Travel Time</td>
<td>CS20123</td>
<td>2016</td>
</tr>
<tr>
<td>S251024</td>
<td>Second Level Support</td>
<td>CS20123</td>
<td>2016</td>
</tr>
</tbody>
</table>

3.1.3 Download Report into Microsoft Excel

What to Say

Introduction

Now that Catherine has the information she has been looking for, she decides to save that information down to Microsoft Excel.

Like many ERP systems, ByDesign allows you to download reports into Microsoft Excel. The particular feature in ByDesign, however, is that this integration is bi-directional.

This means that Catherine can select on the SAP Business ByDesign tab within Excel: Logon to ByDesign from within Excel, manipulate and design a report from within Excel (choose Design Workbook), just as she had done while she was in ByDesign; and then save that workbook back into ByDesign so that other people can have access to it.

She can also save this on her local desktop and then come back in later and refresh the data. (point to the Refresh button on the SAP Business ByDesign tab)

Key Features and Advantages

- Ability to download data into Microsoft Excel
- Integration with Microsoft Excel and particularly the Plug-in for Microsoft Excel that allows you to update data from the system directly out of the MS Excel file. From within Excel, without having to go into ByDesign, you can log on to ByDesign.
3.1.3 Download Report into Microsoft Excel

What to Say

- Adaptability of reports from within Excel (plug-in allows you to do similar alterations to the report as you can do in ByDesign)

Value Statement

Excel integration also supports the three key concepts and key benefits of ByDesign:

- **Transparency** because you have access to the information that you need at any point in time from within a tool that you're very familiar with. So you can log on to ByDesign and pull the information down that you want.

- **Efficiency** because you can define one of these reports and then re-use it and refresh it on a regular basis and because you can share that information with other people.

- **Adaptability** in that you can tailor this information any way you need to from within Excel. And you can apply the adaptability of custom formulas to put into Excel at all the same time.

What to Do

- In the **Profit Analysis by Company** report which we have just personalised, click the Download → Report in Microsoft Excel® in XML Format.

You will see a popup appearing in the bottom half of your browser enabling you to save or open the excel. Choose open – and automatically Excel should appear showing the same report in Excel.

NOTE: if the Open Button is not clickable or doesn’t work use either the next options:

1) Save As your report onto your laptop (XML format), open Excel and in Excel select the report you just saved. In this case no live connection between ByDesign and Excel is active, however you can show/prove that ByDesign can deliver its reports (view, dimensions, data etc) in Excel.

2) Open Excel, go to the SAP BUSINESS BYDESIGN tabstrip. If red icon/Logon is showed, then click this to connect Excel to ByDesign using the CEO01/Welcome1 credentials. (NOTE: it is possible to automate this by
3.1.3 Download Report into Microsoft Excel

What to Say

using a certificate. See help documentation 'Logging on to the system'.

What you Should See

Example
### 3.1.3 Download Report into Microsoft Excel

#### What to Say

#### CEO

---

#### Profit Analysis - Company

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
</tr>
</thead>
</table>
|         | Sent at: | 12/19/2016 10:34:26 EST
|         | Data Based on User: | Catherine Kennedy-Woods
|         | Access Control Code: | * (No Restrictions)
|         | Selection: | Profit Type: | 3 ( Earned Profit)
|         | Company: | Default Selection (Profitability): | 1000 (Almike Inc.)
|         | | Set of Books: | 9011 (Set of Books US GAAP)
|         | Contribution Margin Scheme: | 2012 (US - FS by Function of Expense)
|         | Quick Filters: | Fiscal Year: | 2016 (Fiscal Year like Calendar Year 2016)
|         | Accounting Period/Year: | 001/2016 (January 2016), 002/2016 (February 2016), 003/2016 (March 2016), 004/2016 (April 2016), 005/2016 (May 2016), 006/2016 (June 2016), 007/2016 (July 2016), 008/2016 (August 2016)

<table>
<thead>
<tr>
<th>Customer</th>
<th>Project</th>
<th>Fiscal Year</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unlimited Electrics</td>
<td>CS200123</td>
<td>#</td>
<td>Not assigned</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Result</td>
<td>1.000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Customer</th>
<th>Project</th>
<th>Fiscal Year</th>
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</thead>
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<tr>
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<td></td>
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<td>1.000</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Customer</th>
<th>Project</th>
<th>Fiscal Year</th>
<th>2016</th>
</tr>
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<tbody>
<tr>
<td>Unlimited Electrics</td>
<td>CS200123</td>
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<td>Not assigned</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Result</td>
<td>1.000</td>
</tr>
</tbody>
</table>

---

CEO01
### 3.1.3 Download Report into Microsoft Excel

#### What to Say

Catherine as the CEO would like to get easy visible alerts in the reports. She can very easily add these by clicking on the tool icon in the top right section of the Report, hover over the Key Figure then Manage Exception:

In the popup click New:
3.1.3 Download Report into Microsoft Excel

What to Say
3.1.3 Download Report into Microsoft Excel

What to Say

Then select the following examples:
Name field: choose a name yourself for the Exception
Key Figure: select Gross Profit on Sales
Apply To: select Result
Alert Indicator: choose the visual warning you prefer
Here the mathematical rule chosen says: “Show a Yellow traffic Light indicator at every Gross Profit On Sales which shows a result less than 600,000 USD”: 
3.1.3 Download Report into Microsoft Excel

What to Say

Press OK. Then click the refresh button:

In the report Catherine now sees which lines show a gross profit result lower than her chosen indication!
3.1.4 Drill-Down – Navigation Options from the Report

What to Say

Introduction

Now that Catherine has got the profit analysis for this customer, she takes a look and she sees that the Analyser Implementation is the largest project. She thus wants to get some more information about that and drills down into the project overview.

The project overview just contains the basic project information. In addition, there is also a detailed view (View All) where you can get to an additional level of detail.

Key Features and Advantages

- Many out of the box navigation options to drill down to different information levels.
- Adaptability of navigation concepts to meet specific requirements.

Value Statement

- ByDesign saves you time from hunting for a deeper analysis. All the information you need is presented contextually.

What to Do

- Go back to the Profit Overview by Key Figures table and click on the project title Analyser Implementation.
- In the table open the context menu for the Analyser Implementation project and select View Project Overview.

Comment on the general information that you can find in this view such as:

- Whether this project is billable for a particular customer
- The customer’s address
- Some basic profit analysis attributes
  - View All function where you can get to an additional level of detail.

- Click View All to see the project phases.
3.1.4 Drill-Down – Navigation Options from the Report

What you Should See

Project Overview

What you Should See

Detailed view
3.1.4 Drill-Down – Navigation Options from the Report

Catherine is most interested in the sales information about this particular project. Therefore, she opens the Sales Tracking tab. And from there, she takes a look at the document flow.

This particular flow shows a customer relationship management flow from a lead to an opportunity, a quote, a sales order, a project, and then moves on to accounting with the project invoice request.

Key Features and Advantages
- The document flow is a great example for how SAP Business ByDesign provides a built-in best practice.
- Ease of access and transparency to related business information
- Document flow provides transparency of business transactions (‘audit trail’)
3.1.5 Check Document Flow

Value Statement

- Companies running ByDesign can rest assured their Business is running with transparency and can make credible claims and disclosures.

What to Do

- In the Maintain Project: Analyser Implementation view, click the Sales Tracking tab.
- Then click Document Flow and explain the key features and advantages of the document flow.
- On the right-hand side of the document flow, there is additional information that you want to show. Zoom out because in the next step you will take a closer look at this information, in particular at the customer invoice that you can see there.

What you Should See

3.1.6 View Journal Entry

What to Say

Introduction

If Catherine wants to, she can even drill down from the customer invoice and see the financial general ledger journal entry that was made for this particular invoice.

We see here that it is engineered as a multi-company environment to support multiple sets of books, such as US GAAP, and IFRS. And then, because we support both the IFRS and multiple currencies and multiple languages, it is built for growth around the globe.
3.1.6 View Journal Entry

Key Features and Advantages

- Full integration of document flow into accounting
- Full auditability for the origin of all entries and business documents
- SAP Business ByDesign has been engineered to support a multi-company international environment.
- ByDesign supports multiple sets of books, such as US GAAP, and IFRS and also multiple currencies and languages.

Value Statement

- ByDesign is built as a foundation for growth.

What to Do

- From within the Document Flow view, on the Customer Invoice document (symbol), click on the icon that opens the associated general ledger journal entry for this transaction in Financial Accounting and outline the associated features there.

Point out that SAP Business ByDesign supports the foundation for growth in an international business environment (GAAP, IFRS set of books; multiple currencies, multiple languages, etc.).
3.1.6 View Journal Entry

What you Should See

![Journal Entry screenshot]

General Information:
- Journal Entry Type: Sales Invoice
- Source Document ID: 1901-FEB-2012
- Source Document Type: Sales Invoice
- Source Document Date: 1901-FEB-2012
- External Reference: 71000000118
- Journal Entry ID: 7100 - Set of Books /FRS
- Year: 2012

Line Items

<table>
<thead>
<tr>
<th>GL Account</th>
<th>Detail in Company Currency</th>
<th>Credit in Company Currency</th>
<th>Cost Center ID</th>
<th>Profit Center ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>100000 - Domestic Sales</td>
<td>5,400.00 USD</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>100000 - Accounts Receivable Domestic</td>
<td>5,407.40 USD</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Item Details: General
- General Ledger Account: 100000 - Domestic Sales
- Profit Center: 87150 - Accounts Payable
- Segment: 87150 - Accounts Payable
- Functional Area: 8000 - America

Item Details: Sales
- Sales Document ID: 1401
- Sales Document Item ID: 1401-10

3.1.7 Review Sales Order and Account Information

What to Say

Introduction
Catherine now wants to have some more detailed information about this particular customer and this particular sales order.

After she has seen the detail for this particular sales order, in preparation for a possible meeting with the account, she decides to take a look at the accounts overview

Key Features and Advantages
- Find information efficiently anywhere in the application

Value Statement
- Reduce the amount of time looking for information.
3.1.7 Review Sales Order and Account Information

What to Do

Sales order overview

- Back in the document flow, click on the sales order number on the sales order symbol to open the order overview. Explain the layout and general features there.

- Point out what kind of information is displayed here, such as:
  - the basic information about the ship-to
  - general information down below
  - Further down, she can see the detailed line items for this particular sales order with all the prices and any discounts that might apply.

- Now that Catherine has seen the detail for this particular sales order, in preparation for a possible meeting with the account, she decides to take a look at the accounts overview.

Alternative navigation to a sales order: open the workcenter Project Management. The Overview screen opens automatically showing Catherine the Top5 Projects.
3.1.7 Review Sales Order and Account Information

Hover the mouse over project 200_PRO_250, the description Analyser Implementation. You will note a small triangle which, when clicked, will retrieve the navigation options.

My Top 5 Projects - Work

This may take a second or two, and then you can jump from the report directly into further details:
### 3.1.7 Review Sales Order and Account Information

Select **View Project Overview**. In the new resulting screen you can now jump into details about the account **William and Sons**. Or by clicking the **View All** button you have easy access to the Document Flow of this project visible in the More tab.
3.1.7 Review Sales Order and Account Information

Corporate account overview

- In the **Sales Order Overview**, click on the account **William and Sons** to see the 360 degree view of this account.
- Show the wealth of information the system provides on the **Accounts Overview** on the overview and detailed views.
- **General** tab displays basic account information including data such as address, contacts, relationships, responsibilities, etc. It helps Catherine to quickly get an answer to questions like “What ABC type account is this?”, “Whom of my colleagues have responsibilities with this account?” or “What was the last year sales revenue we did with this account?” Often it is a good page to add mashups like showing the location (address) of the account on a map (Google, Bing, etc.) or to add a mashup showing the latest news on the account.
- More detailed information can be provided on other tab pages, such as **Sales**, **Service** and **Financials**. So, for example, the **Sales** tab provides information on quotes, leads, sales orders, and opportunities.
- The **Sales** tab provides a full 360° view on your account from a marketing and sales perspective! From having views and details on activities, campaigns, leads and opportunities right to sales quotes and sales orders.
- The **Services** Tab gives a full view on the account from a services perspective – enabling you to quickly see/answer questions like “Which registered product(s) does this account have?” “Which service orders are being executed and are we meeting the deadlines on delivering here?”
- The **Financials** Tab provides a brief view on the account answering questions like “Which invoices are still outstanding?” or “Does the account pay all our invoices?”
- An example from drilling down deeper in the 360° view of the account with basic information in the general section:

**What you Should See**

Account Overview, general view:

<table>
<thead>
<tr>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legal entity: LLC (Limited liability company)</td>
</tr>
<tr>
<td>ABC Classification: C-Account</td>
</tr>
<tr>
<td>Industry: Construction</td>
</tr>
<tr>
<td>Netbank ID:</td>
</tr>
<tr>
<td>Document block: No</td>
</tr>
<tr>
<td>Status: Active</td>
</tr>
</tbody>
</table>

**Contacts**

<table>
<thead>
<tr>
<th>Contact Name</th>
<th>Function</th>
<th>Department</th>
<th>Phone</th>
<th>Mobile</th>
<th>E-Mail</th>
<th>Main</th>
<th>Function From Business Card</th>
</tr>
</thead>
<tbody>
<tr>
<td>Williams, Eric</td>
<td></td>
<td></td>
<td>+1 (614) 833-6667</td>
<td>+1 (716) 833-6668</td>
<td><a href="mailto:customer0@byd.com">customer0@byd.com</a></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Relationships**

<table>
<thead>
<tr>
<th>Relationship Type</th>
<th>Business Partner Name</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>No records found</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Project Management**

<table>
<thead>
<tr>
<th>Party Role</th>
<th>Employee Name</th>
<th>Phone</th>
<th>Direct Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Perfs.</td>
<td>Ingersoll, Jack</td>
<td>+1 216-565-2523</td>
<td>Yes</td>
</tr>
<tr>
<td>Employee Res.</td>
<td>Branson, Victoria</td>
<td>+1 330-395-0775</td>
<td>Yes</td>
</tr>
<tr>
<td>Service Perfs.</td>
<td>Polley, Brian</td>
<td>+1 330-395-0571</td>
<td>Yes</td>
</tr>
<tr>
<td>Service Perfs.</td>
<td>Polley, Diane</td>
<td>+1 330-395-0357</td>
<td>Yes</td>
</tr>
</tbody>
</table>
3.1.7 Review Sales Order and Account Information

When Catherine wants to lookup Victoria Brannon as one of her colleagues, she can easily pull up this information by clicking the name:

![Employee Overview](image)

**Basic Information**
- **First Name:** Victoria
- **Last Name:** Brannon
- **Employee ID:** E0210

**Organizational Data**
- **Company:** Almika Inc.
- **Reporting Line Unit:** Sales Canton (East)
- **Cost Center:** Sales Canton (East)
- **Job:** Sales Representative
- **Reports To:** Roberta Johnson

**Communication Data**
- **Phone:** +1 330 399 3575-1
- **Mobile:**
- **Fax:** +1 330 399 3510
- **E-Mail:** Victoria.Brannon@us.almika-

**Office location**
- **Building/Room:** 13
- **Address:** 37 Harbor Drive
- **City:** Canton OH 44708
- **Country:** United States

In the Account Overview, the Sales Tab:
3.1.7 Review Sales Order and Account Information

In addition to seeing the account information within the system, Catherine can also print a preview of this 360° view of the account.

In this standard view, you can see:

- basic account information
- contacts
- responsibilities
- any sales data that is related to current activities: phone calls, appointments, etc. that have occurred within the account regardless of who has performed them.

3.1.8 PDF Forms

What to Say

Introduction

In addition to seeing the account information within the system, Catherine can also print a preview of this 360° view of the account.

In this standard view, you can see:

- open opportunities that you’re working with this customer
- quotes you’re working with
### 3.1.8 PDF Forms

- sales orders, etc.

#### Key Features and Advantages

- **PDF output format for system overview screens**
  
  This is a great example of how ByDesign utilises the Adobe PDF system to provide all forms, into PDF form so that you can share them with other people or, send them in a mobile and e-mail, in a mobile environment.

- **Built-in PDF designer enables adaptability of forms**
  
  Using the built-in PDF designer, you could change the logos, or the layout of any of the information.

- **This PDF document can be e-mailed out to your iPhone so that you can refresh this information just before the meeting with your customer**
  
  This is essential information to have for any visits with your accounts.

#### Value Statement

- Information that is shared with customers is accurate and reliable.

#### What to Do

- In the **Corporate Account Overview**, click **Preview** to open the related form.

- Point out that you can e-mail, print or process the form depending on what you want to do with it.

- Remember: paper/PDF may not be needed anymore as ByDesign works perfectly well on your tablet in HTML5 showing you all account information in real-time …
### 3.1.8 PDF Forms

#### What you Should See

**Account Overview**

<table>
<thead>
<tr>
<th>Account</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>William &amp; Sons</td>
<td>Legal Form: Limited liability company</td>
</tr>
<tr>
<td>155 E Walnut Street</td>
<td>ABC Classification: C.Account</td>
</tr>
<tr>
<td>Westerville OH 43081</td>
<td>Industry: Construction</td>
</tr>
<tr>
<td>United States</td>
<td>Nielsen ID:</td>
</tr>
<tr>
<td>Phone: +1 (614) 833-6067</td>
<td>Document Block: No</td>
</tr>
<tr>
<td>Fax: +1 (614) 833-6080</td>
<td>Status: Active</td>
</tr>
<tr>
<td>E-Mail: <a href="mailto:customer01@bydmail.com">customer01@bydmail.com</a></td>
<td></td>
</tr>
<tr>
<td>Web Site:</td>
<td></td>
</tr>
</tbody>
</table>

### Contacts

<table>
<thead>
<tr>
<th>Contact Name</th>
<th>Function</th>
<th>Department</th>
<th>Phone</th>
<th>Mobile</th>
<th>E-Mail</th>
<th>Main</th>
</tr>
</thead>
<tbody>
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<td></td>
<td></td>
<td>+1 (614) 833-6067</td>
<td>+1 (716) 833-6068</td>
<td><a href="mailto:customer01@bydmail.com">customer01@bydmail.com</a></td>
<td>X</td>
</tr>
</tbody>
</table>

### Relationships

<table>
<thead>
<tr>
<th>Relationship Type</th>
<th>Name</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Responsibilities

<table>
<thead>
<tr>
<th>Party Role</th>
<th>Employee Name</th>
<th>Phone</th>
<th>Direct Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Responsible - Sales</td>
<td>Brannon, Victoria</td>
<td>+1 330 399 3575-1</td>
<td>X</td>
</tr>
<tr>
<td>Service Performer - Sales Orders</td>
<td>Polley, Briana</td>
<td>+1 330 399 3577-3</td>
<td>X</td>
</tr>
<tr>
<td>Service Performer - Service</td>
<td>Ingersoll, Jack</td>
<td>+1 216 555 2523</td>
<td>X</td>
</tr>
<tr>
<td>Service Performer - Service</td>
<td>Polley, Briana</td>
<td>+1 330 399 3577-3</td>
<td>X</td>
</tr>
</tbody>
</table>

### Sales Data

<table>
<thead>
<tr>
<th>Sales Organization</th>
<th>Distribution Channel</th>
<th>Delivery Priority</th>
<th>Incoterms</th>
<th>Incoterms Location</th>
<th>Customer Group</th>
<th>Payment Terms</th>
<th>Cross-Account Sales Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Pro</td>
<td>Direct sales</td>
<td>Normal</td>
<td></td>
<td></td>
<td></td>
<td>20 days net</td>
<td></td>
</tr>
<tr>
<td>Service &amp; Support Pro</td>
<td>Direct sales</td>
<td>Normal</td>
<td></td>
<td></td>
<td></td>
<td>20 days net</td>
<td></td>
</tr>
</tbody>
</table>

### Open Activities

<table>
<thead>
<tr>
<th>Status</th>
<th>Date / Time</th>
<th>Subject</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>12.2, 2016</td>
<td>Develop solution properties</td>
<td>Task</td>
</tr>
</tbody>
</table>
3.2 Business Task Management

3.2.1 Create a Business Task for a Colleague

What to Say

Introduction
While she is in the Corporate Account Overview, Catherine decides to ask for a meeting to be set up with this account. In the Account Overview, she can see that Victoria Brannon is the employee responsible and then utilizes the built-in business task management to ask Victoria to organise this meeting.

AUTOCOMPLETE FEATURE
As Victoria does not remember Brannon’s employee number, she just types in “BR”, and the system brings up a short list of employees. She selects Victoria and she specifies ‘I would like you to set up a meeting’, gives it a particular priority and attaches anything that she wants and then sends it.

The next time Victoria looks in her inbox in ByDesign, she’ll see that task and when she clicks on this tasks, it will bring her directly to this particular account.

Key Features and Advantages
- ByDesign has built into it a business task management that provides a work flow to you and allows you to effectively collaborate with your colleagues across the organisation and to manage accounts, opportunities, projects, etc.
- Autocomplete feature supports user-efficiency

Value Statement
- This feature again offers transparency as you can get access to the information you need.
- It also offers efficiency because of the built in best business practices and tools that allow you to collaborate with your organisation.

What to Do
- From the Corporate Account Overview of account William & Sons, click New → Task.
- In the task that opens, enter the addressee, the subject and a description. Take the opportunity to highlight the auto-complete function.
- Type in a title in the subject field: Set up a meeting and maybe also a note.
- Explain the efficiency and transparency of the business task management.
- Just show where to save the task (but do not save it to prevent clogging up the demo system with business tasks).

What you Should See
3.2.1 Create a Business Task for a Colleague

When Save & Close this new task, it will appear automatically in Victoria’s (SALES02S) Inbox/Today:
3.2.1 Create a Business Task for a Colleague

If Victoria clicks the Open Tasks tile she sees the task Catherine wants her to take care of:
### 3.2.1 Create a Business Task for a Colleague

#### Task: Set up meeting with William & Sons

**Description:**

This is a manually created business task. Refer to the notes for detailed instructions.

**From:** Catherine Kennedy-Woods  
**Person Responsible:** Victoria Brannon

**Notes**

*Internal Comment 12/12/2016 07:08 Catherine Kennedy-Woods*

Hello Victoria,
Could you please set up a meeting with W&S on the Analyzer project, before the end of this month?

Thank you, cheers,

Catherine

Victoria can select the appropriate action using the **Actions** button.

---

### 3.2.2 Using Web Services

**What to Say**

**Introduction**

After Catherine has sent a request to set up that meeting, she decides that she’ll take a look at the maps and directions so that she knows how she can get over to the account. She utilises the Web Services that are integrated into ByDesign to see what the driving directions are.

In this feature, the account address information was moved over and put into Google maps, so that it’s automatic.

So you can pass information out of ByDesign into third party applications utilising web services, and, vice versa, you can take information out of a third party application and bring it into ByDesign using this latest state-of-the-art in technology for integration.
3.2.2 Using Web Services

Key Features and Advantages

- ByDesign allows you to integrate external web services with functions in the system for quick and efficient flow of information.
- The integration of Google Maps can be used, for example, in the distribution environment to capture the shipping information; so that you get UPS tracking information, for example, and you can bring that back into ByDesign. If anybody has a question such as "where's my shipment", you can easily get at that information.
- No programming is required to set this up, simply pass the appropriate parameters along; it only needs to be set up once and then you can use it.

Value Statement

- Mashup information allows for innovation and increased productivity.

What to Do

- In the Corporate Account Overview, explain the capability to integrate and leverage Web Services (in this case: Google Maps) to provide additional useful information for this data record. By taking information, such as the address, from the account's record and adapting and sending it to a third-party application – Google Maps – you can combine information from within ByDesign with other information that is in an external source.
- In the Corporate Account Overview, click Web Services \(\rightarrow\) Map Directions (maps.google.com).
- This shows you a Google map with the exact position where your customer William & Sons is located.

Often it is more powerful to include mashups in the ByDesign screens. The administrator can pre-set mashups showing for example the location of an Account on a map. The resulting mashup is then added by the administrator to the Account Overview screen. The result can look like this:
3.2.2 Using Web Services

Summarize up and conclude this section of the demo:

This was a great example of adaptability, so we just got through seeing an example of:

- **adaptability** with the web services
- **efficiency** with the built-in business task management, and
- **transparency** because you have access to the information you need

This was true for the sales order as well, and, when we were taking a look at the project, we saw from an **efficiency** perspective, the built-in business flows that come with ByDesign.

And from a **transparency** perspective, the ability to find the information and drill down into any level of detail that we wanted to.

What you Should See

![Company Information](hoovers.com)

![Map/Directions](maps.google.com)
3.2.2 Using Web Services

155 E Walnut St
Worthington, OH 43085

Directions

Add a missing place
3.3 Self-Services

3.3.1 Self-Services Overview

<table>
<thead>
<tr>
<th>What to say</th>
</tr>
</thead>
</table>

**Introduction**
SAP Business ByDesign offers a whole range of self-services to all users so that they can work with the system most efficiently.

- All employees can look up other employees in the organisation, track requests.
- Managers can track the leave requests from their employees.
- You can submit expenses; there is an approval process for that.
- You can do shopping. So you can have requisitions to go out and buy a product.
- You can use the learning centre to get up to speed with the system and learn how to use it in the most efficient way. This built in E-learning is a critical part of being able to get the system up and running very quickly.

**Key Features and Advantages**

- Employees can self-serve with functional and administrative tasks.
- New users can learn at their own pace with built in learning libraries.

**Value Statement**

- ByDesign reduces demand for other resources to complete simple tasks and allows people to get new users quickly trained.

**What to Do**

- Work centre [Home ➔ Self-Services ➔ Self-Services Overview](#)
3.3.1 Self-Services Overview
3.3.1 Self-Services Overview

What you Should See
Self-Services Overview

3.3.2 Learning Centre Overview

What to say

Introduction
In this step, show an example of a built-in E-learning recording. Point out that these e-learnings are role-based and provide information / help with regard to the specific business tasks of each business user’s role. That is, they show the common tasks that this person usually needs to perform. The recording will give you a demonstration of this task.

Key Features and Advantages

- Latest state of the art in adult education and e-learning.
- It covers role-based training and help that focuses on the particular tasks of that business role. And it also offers the capability to measure the learning progress of your employees by means of exercises (not for all roles) and quiz links.

Value Statement

- This time and cost saving way of training supports profitability because you do not have to send employees on a training course for a week to teach them how to do their tasks in the system.
- You are more independent bringing people on as they can go ahead and learn at their own pace. The Learning Centre thus saves you a lot of resources and at the same time empowers your employees to train themselves for their daily tasks.
3.3.2 Learning Centre Overview

What to Do
Show a short sequence from an e-learning recording and comment on it.
- In the Self-Services Overview, click Access My Learning Centre → Role-Based Learning.
- In the table of contents, expand the menu for Executive Manager and then click on Executive Manager.
- Start and show a part of a self-running demo, for example for Working with KPIs, and comment on the basic features.

What you Should See
# 4 Scenario Quick Guide and Key Master Data

## 4.1 Focus on Business Analytics

### Steps Summary

<table>
<thead>
<tr>
<th>Path</th>
<th>Data to Use/Enter</th>
<th>Activity</th>
</tr>
</thead>
</table>
| Home work centre (Overview) | n.a. | Show Launchpad and Home page and explain the different overviews Catherine has chosen for her Home page:  
  - Profit Analysis by Company  
  - Purchase Orders per Month  
  - Cost Centres – Plan/Actual  
  - (Home Quick Links)  
  - (My Top Worklist) |

Add tiles/favourites to your Launchpad to enable easy and fast access to tasks and activities you prefer!

Rename groups on the Launchpad into titles which increase the recognisability of ByDesign to you (your prospect)

### Adaptable View Options form the Home Page

<table>
<thead>
<tr>
<th>Path</th>
<th>Data to Use/Enter</th>
<th>Activity</th>
</tr>
</thead>
</table>
| Home work centre (Overview – Profit Analysis by Company report) | n.a. | In the Profit Analysis by Company section, click Actions → Analyse Data  
  - Click Charts and Table → Table to switch to the table view of this report and to show the different display options for a report.  
  - In the report table, click on the context menu of Net Sales Revenue → Profit Overview by Key Figure.  
  - Again, switch from the graphical to the table view.  
  - Scroll down the Not Currently Shown list to see additional key figures and point out that you can add different information categories to your profitability report by selecting them from the list and moving it to the Rows or Columns |
<table>
<thead>
<tr>
<th>Path</th>
<th>Data to Use/Enter</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td><strong>field. Alternative key figures:</strong> Profitability by <strong>Cost Centre</strong> or by <strong>Profit Centre</strong>.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Move the key figure Customers from the <strong>Not Currently Shown</strong> list to the <strong>Rows</strong> field.</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Click Edit Filter and select the customer CS200128 (William &amp; Sons) from the input help, then click Go. (play around selecting another customer if their data is more appropriate for you/your demo)</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Move the key figure Project to the <strong>Rows</strong> field, so that you can see the profitability of this customer by projects.</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Download Report into Microsoft Excel</strong></td>
</tr>
<tr>
<td><strong>Home work centre (Overview –Profit Analysis by Company report)</strong></td>
<td></td>
<td><strong>In the Profit Analysis by Company report, click Download → Report in Microsoft Excel® in XML Format.</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Explain bi-directional MS Excel integration</strong></td>
</tr>
<tr>
<td><strong>Drill-Down – Navigation Options from the Report</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Home work centre (Overview –Profit Analysis by Company report)</strong></td>
<td></td>
<td><strong>Go back to the <strong>Profit Overview by Key Figures</strong> table and click on the project title <strong>Analysen Implementation</strong>.</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>In the table open the context menu for the <strong>Analysen Implementation</strong> project and select <strong>View Project Overview</strong>.</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Comment on the general information that you can find in this view such as:</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>o Whether this project is billable for a particular customer</td>
</tr>
<tr>
<td></td>
<td></td>
<td>o The customer’s address</td>
</tr>
<tr>
<td></td>
<td></td>
<td>o Some basic profit analysis attributes</td>
</tr>
</tbody>
</table>
| | | o **View All** function where you can get to
<table>
<thead>
<tr>
<th>Path</th>
<th>Data to Use/Enter</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>an additional level of detail.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Click <strong>View All</strong> to see the project phases.</td>
</tr>
</tbody>
</table>

**Check Document Flow**

**Maintain Project: Analyser Implementation view**

- In the **Maintain Project: Analyser Implementation** view, click the **Sales Tracking** tab.
- Then click **Document Flow** and explain the key features and advantages of the document flow.
- On the right-hand side of the document flow, there is additional information that you want to show. Zoom out because in the next step you will take a closer look at this information, in particular at the customer invoice that you can see there.

**View Journal Entry**

**Document Flow of Analyser Implementation Project**

- From within the **Document Flow** view, on the **Customer Invoice** document (symbol), click on the icon that opens the associated general ledger journal entry for this transaction in Financial Accounting and outline the associated features there.
- Point out that SAP Business ByDesign supports the foundation for growth in an international business environment (GAAP, IFRS set of books; multiple currencies, multiple languages, etc.).

**Review Sales Order and Account Information**

**Document Flow of Analyser Implementation Project**

- From the document flow, click on the sales order number on the sales order symbol to open the order overview. Explain the layout and general features there.
<table>
<thead>
<tr>
<th>Path</th>
<th>Data to Use/Enter</th>
<th>Activity</th>
</tr>
</thead>
</table>
|      |                  | - Point out what kind of information is displayed here, such as:  
  - the basic information about the ship-to  
  - general information down below  
  - Further down, she can see the detailed line items for this particular sales order with all the prices and any discounts that might apply. |
|      |                  | **Corporate account overview**  
  - In the Sales Order Overview, click on the account William and Sons to see the 360 degree view of this account.  
  - Show the wealth of information the system provides on the Accounts Overview on the overview and detailed views.  
  - General tab displays basic account information including data such as address, contacts, relationships, responsibilities, etc.  
  - More detailed information on tab pages Sales, Service and Financials. So, for example, the Sales tab provides information on quotes, leads, sales orders, and opportunities. |
|      |                  | **PDF Forms**  
  - In the Corporate Account Overview, click Preview to open the related form.  
  - Point out that you can e-mail, print or process the form depending on what you want to do with it.  
  - Comment on the adaptability of these forms. |

**Corporate Account Overview**  
- In the Corporate Account Overview, click Preview to open the related form.
## 4.2 Business Task Management

### Steps Summary

<table>
<thead>
<tr>
<th>Path</th>
<th>Data to Use/Enter</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Send a Business Task to a Colleague</strong></td>
<td></td>
<td><strong>Corporate Account Overview</strong></td>
</tr>
<tr>
<td>From the Corporate Account Overview of account William &amp; Sons, click New → Task.</td>
<td></td>
<td>In the task that opens, enter the addressee, the subject and a description. Take the opportunity to highlight the auto-complete function.</td>
</tr>
<tr>
<td>In the task that opens, enter the addressee, the subject and a description. Take the opportunity to highlight the auto-complete function.</td>
<td></td>
<td>Type in a title in the subject field: <strong>Set up a meeting</strong> and maybe also a note.</td>
</tr>
<tr>
<td>Type in a title in the subject field: <strong>Set up a meeting</strong> and maybe also a note.</td>
<td></td>
<td>Explain the efficiency and transparency of the business task management.</td>
</tr>
<tr>
<td><strong>Using Web Services</strong></td>
<td></td>
<td><strong>Application screen (in ByD: WoC and view)</strong></td>
</tr>
<tr>
<td>In the Corporate Account Overview, explain the capability to integrate and leverage Web Services (in this case: Google Maps) to provide additional useful information for this data record. By taking information, such as the address, from the account’s record and adapting and sending it to a third-party application –Google Maps– you can combine information from within ByDesign with other information that is in an external source.</td>
<td></td>
<td>In the Corporate Account Overview, click Web Services → Map Directions (maps.google.com).</td>
</tr>
<tr>
<td>In the Corporate Account Overview, click Web Services → Map Directions (maps.google.com).</td>
<td></td>
<td>This shows you a Google map with the exact position where your customer William &amp; Sons is located.</td>
</tr>
<tr>
<td>This shows you a Google map with the exact position where your customer William &amp; Sons is located.</td>
<td></td>
<td>Summarise up and conclude this section of the demo.</td>
</tr>
</tbody>
</table>

---

**Note:** The steps and activities described in this document are based on the SAP Business ByDesign (ByD) platform and may vary depending on the specific version and configuration of the software. Always consult the official SAP documentation or contact SAP support for the most accurate and current information.
## 4.3 Self Services

<table>
<thead>
<tr>
<th>Path</th>
<th>Data to Use/Enter</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Self-Services Overview</td>
<td></td>
<td>Outline the features of the built-in self-services</td>
</tr>
<tr>
<td>WoC Home → Self Services → Self Services Overview</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Learning Centre Overview</td>
<td></td>
<td></td>
</tr>
<tr>
<td>▸ In the Self-Services Overview, click Access My Learning Centre →</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Role-Based Learning</td>
<td></td>
<td></td>
</tr>
<tr>
<td>▸ In the table of contents, expand the menu for Executive Manager</td>
<td></td>
<td></td>
</tr>
<tr>
<td>and then click on Executive Manager</td>
<td></td>
<td></td>
</tr>
<tr>
<td>▸ Start and show a part of a self-running demo, for example for</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Working with KPIs, and also the quiz link and comment on the</td>
<td></td>
<td></td>
</tr>
<tr>
<td>basic features of each, and on how they work.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
5 Appendix

The data provided in this script is country specific. Please refer to the table below to find a sales ID that was created in the demo system of the respective country version.

<table>
<thead>
<tr>
<th>Country</th>
<th>Sales Quote ID</th>
<th>Sales Order ID</th>
<th>Project ID</th>
<th>Customer Invoice</th>
</tr>
</thead>
<tbody>
<tr>
<td>AT</td>
<td>359</td>
<td>1628</td>
<td>200_PRO_250</td>
<td>1RE-192-2012</td>
</tr>
<tr>
<td>AU</td>
<td>211</td>
<td>416</td>
<td>200_PRO_250_AUS</td>
<td>1INV-186_2012</td>
</tr>
<tr>
<td>CA</td>
<td>110</td>
<td>212</td>
<td>200_PRO_250</td>
<td>1INV-156_2012</td>
</tr>
<tr>
<td>CH</td>
<td>71</td>
<td>93</td>
<td>200_PRO_250</td>
<td>1INV-73-2012</td>
</tr>
<tr>
<td>CN</td>
<td>234</td>
<td>516</td>
<td>200_PRO_250</td>
<td>1FP-200-2012</td>
</tr>
<tr>
<td>DE</td>
<td>237</td>
<td>1595</td>
<td>200_PRO_250</td>
<td>1RE-176-2012</td>
</tr>
<tr>
<td>FR</td>
<td>209</td>
<td>540</td>
<td>200_PRO_250</td>
<td>F111-251-2012</td>
</tr>
<tr>
<td>IN</td>
<td>241</td>
<td>485</td>
<td>200_PRO_250</td>
<td>1ST1-288</td>
</tr>
<tr>
<td>MX</td>
<td>203</td>
<td>409</td>
<td>200_PRO_250</td>
<td>1FC-334</td>
</tr>
<tr>
<td>UK</td>
<td>241</td>
<td>476</td>
<td>200_PRO_250</td>
<td>1INV-223-2012</td>
</tr>
<tr>
<td>US</td>
<td>281</td>
<td>1641</td>
<td>200_PRO_250</td>
<td>1INV-178-2012</td>
</tr>
<tr>
<td>NL</td>
<td>21</td>
<td>32</td>
<td>200_PRO_250</td>
<td>1INV-20-2013</td>
</tr>
</tbody>
</table>
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