



### REPLY TED

**Solution:** REPLY TED

**Solution Overview:** Managing tenders in a SharePoint workflow while keeping in sync with SAP CRM data

**Partner Name:** Reply Deutschland AG

**Partner Name:** [www.reply.de](http://www.reply.de)

**Partner Size:** 550 Employees

**Country or Region:** DACH

**Industry:** Automobile, Manufacturing, Retail, Banking, Insurance, Media

**Partner profile:** Reply Deutschland is a leading IT service provider which provides consulting, integration and outsourcing services or efficient corporate management. For our innovative, flexible and reliable solutions of the highest quality, we use adaptive and agile IT platforms and extend them with customer-specific components. This makes it possible for customers of Reply Deutschland to differentiate themselves in the market and creates long-term competitive advantages.

**Software and Services:**

- Duet Enterprise for Microsoft SharePoint 2010 and SAP
- Microsoft SharePoint Server 2010

For more information about Duet Enterprise, go to:

[www.duet.com](http://www.duet.com)

[www.microsoft.com/Duet](http://www.microsoft.com/Duet)

[www.sap.com/duetenterprise](http://www.sap.com/duetenterprise)

“Duet Enterprise enables us to offer our SAP-based clients the advantages and possibilities that Microsoft SharePoint and Microsoft Office supply.”

Wolfgang Klein, Partner & CEO at Cluster Reply GmbH & Co. KG

Managing tenders in a SharePoint workflow while keeping in sync with SAP CRM data.

#### Business Needs

Complex quotations, like participating in a tender, span several departments and need a lot of steps until completion. The people involved in the process have different backgrounds and are using different tools in their day to day work.

While the process might be initiated by the sales department using SAP CRM, it will cross departments like legal or financials, which traditionally use SAP ERP or non-SAP systems.

On the one hand managing this process in a SAP CRM workflow requires all participants to use the CRM system. On the other hand managing the process in

Microsoft SharePoint, gives no transparency in the SAP reporting.

Additional steps might be necessary to manually create a quotation and sales order in SAP CRM to finish the process.

#### Solution


Leveraging the Duet Enterprise technology of Microsoft and SAP the formerly independent worlds of Microsoft SharePoint and SAP are connected. Reply TED is based on Duet Enterprise technology and creates a link to SAP CRM data objects.

A new quotation process is created in the SharePoint workspace of Reply TED and the initial tasks are automatically created in SharePoint. At creation, the user can search for existing business partners in the SAP landscape and attach them as prospect to the document, or, if the business partner does not exist yet, a new business partner can be created from the SharePoint User Interface (UI). Both, new business partners and the created quotation process, will be synchronised with the SAP system. New business partners are created as regular business partners in the SAP system. The quotation process, which is not yet finished and might not result in an actual quotation, is mirrored as an opportunity in the SAP CRM system.

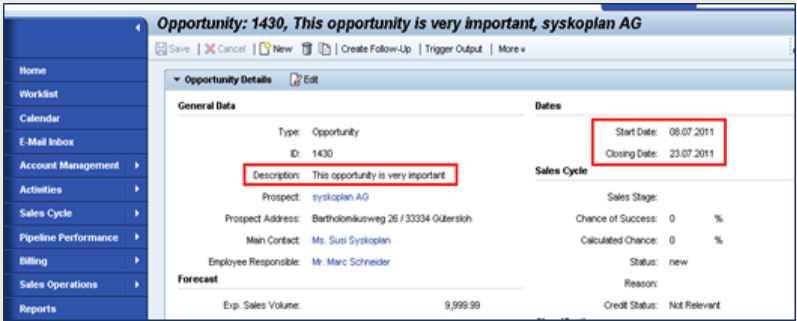
## Benefits

The synchronised approach leverages the benefits of both systems. From Microsoft SharePoint we get the ease of use and flexibility in the workflows. Having Microsoft SharePoint documents backed by the SAP CRM guarantees consistent master data and full integration into the company reporting.

- Time saved per process: ~45min
- Transparency and consistency: priceless



TASKS	OpportunityID	OpportunityDescription	StartingDate	ClosingDate
Tasks Due Today	000000437	This is an opportunity description	08.07.2011 02:00	09.07.2011 02:00
Finance Tasks	000000436	Another opportunity description	08.07.2011 02:00	09.07.2011 02:00
Sales Tasks	000000434	CREATE by Service Test	01.08.2011 02:00	02.08.2011 02:00
All Tasks	000000430	This opportunity is very important	08.07.2011 02:00	23.07.2011 02:00

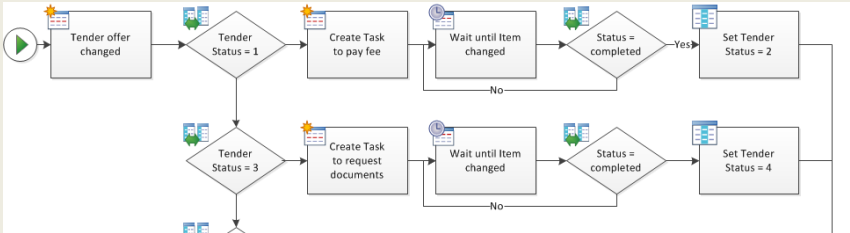
**Opportunity: 1430, This opportunity is very important, syskoplan AG**

Type: Opportunity  
ID: 1430  
Description: This opportunity is very important.  
Prospect: syskoplan AG  
Prospect Address: Bartholomäusweg 26 / 33334 Gütersloh  
Main Contact: Mr. Susi Syskoplan  
Employee Responsible: Mr. Marc Schneider

Dates: Start Date: 08.07.2011, Closing Date: 23.07.2011

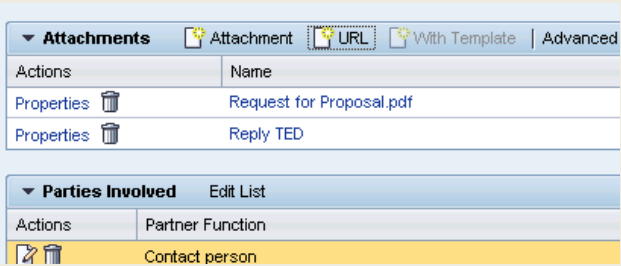
Sales Cycle: Sales Stage: Chance of Success: 0 %, Calculated Chance: 0 %, Status: new, Reason: Credit Status: Not Relevant

Forecast: Exp. Sales Volume: 9,999.99

```

graph TD
    Start([Tender offer changed]) --> D1{Tender Status = 1}
    D1 --> T1[Create Task to pay fee]
    T1 --> W1[Wait until Item changed]
    W1 --> D2{Status = completed}
    D2 -- Yes --> S1[Set Tender Status = 2]
    D2 -- No --> D1
    D1 --> D3{Tender Status = 3}
    D3 --> T2[Create Task to request documents]
    T2 --> W2[Wait until Item changed]
    W2 --> D4{Status = completed}
    D4 -- Yes --> S2[Set Tender Status = 4]
    D4 -- No --> D3
  
```

**Attachments** Attachment URL With Template Advanced

Actions	Name
Properties	Request for Proposal.pdf
Properties	Reply TED

**Parties Involved** Edit List

Actions	Partner Function
	Contact person