

Release Notes

SAP Enhancement Package 3 (Including SP03) for SAP CRM 7.0

Note: You can find the release notes for later support packages of this release in the SAP Help Portal at <http://help.sap.com/crm703#section1>



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Notices of Discontinuation	8
Mobile Sales and Service for Handheld Devices (Advance Notice of Discontinuation)	8
Citrix Operation of Mobile Sales and Service for Laptop (Advance Notice of Discontinuation).....	9
Selling via eBay (Advance Notice of Discontinuation)	10
SAP for Telecommunications: Sales and Order Management for Web Channel (Advance Notice of Discontinuation).....	11
SAP for Telecommunications: Sales and Order Management for Dealer Channel (Advance Notice of Discontinuation).....	12
Master Data	13
Business Function Social Media Integration in Business Partner	13
CRM_SMI: Business Function Social Media Integration in Business Partner (New)	13
Business Function Reduction of TCO in Business Partner	14
CRM_TCO_1: Business Function Reduction of TCO in Business Partner (New)	14
Business Function Marketing Permissions	15
CRM_MKT_PERMISSION: Exchange of Marketing Permission Data (New).....	15
CRM_MKT_PERMISSION: Marketing Permissions in Data Cleansing (New)	16
Business Function Simple Search for Business Partners and Products	17
CRM_SEARCH_1: Business Function Simple Search for Business Partners and Products (New)	17
Business Function Usability Enhancements to Master Data.....	18
CRM_MD_CPM: Business Function Usability Enhancements to Master Data (New).....	18
Business Function Enhancements to Listings	19
CRM_LST_CPM: Business Function Enhancements to Listings (New).....	19
Basic Functions	21
Business Function Search in Business Object Attachments.....	21
CRM_ES_BY_ATTACHMENT: Business Function Search in Business Object Attachments (New for SP02)	21
CRM_ES_BY_ATTACHMENT: Business Function Search in Business Object Attachments (Enhanced for SP03).....	22
Marketing.....	23
Business Function Usability Enhancements to Marketing	23
CRM_MKT_CPM: Business Function Usability Enhancements to Marketing (New)	23
Business Function Creation of a Campaign and Target Group from an External System.....	24
CRM_SME_MKT_CPG: Business Function Creation of a Campaign and Target Group from an External System (New).....	24
Business Function Social Media Integration in Marketing	25
CRM_SMI_MKT: Business Function Social Media Integration in Marketing (New for SP02)	25
CRM_SMI_MKT: Marketing Prospect (Enhanced for SP02)	26
CRM_SMI_MKT: Interaction Object (Enhanced for SP02)	27
CRM_SMI_MKT: External List Management (Enhanced for SP02)	28
CRM_SMI_MKT: Personalized Mail (Enhanced for SP02).....	29
CRM_SMI_MKT: Business Function Social Media Integration in Marketing (Enhanced for SP03)	30
Sales	31
Business Function Integration with SAP TM (Opportunity to Agreement)	31
CRM_TM_O2A: Integration with SAP TM (Opportunity to Agreement) (New for SP02)	31

Service	32
Business Function Sales and Service	32
CRM_SLS_SRV_1: Prediction of Service Duration and Service Parts (Enhanced).....	32
CRM_SLS_SRV_1: Map Integration in Service Resource Planning (New).....	33
Business Function Service Request Enhancements	34
CRM_ITSM: Business Function Service Request Enhancements (Enhanced).....	34
Multichannel Integration	35
Business Function SAP Multichannel Foundation for SAP CRM.....	35
CRM_MCF_R1: Business Function SAP Multichannel Foundation for SAP CRM (New)	35
CRM_MCF_R1: Transfer of Merchandise Category Hierarchies (New).....	36
CRM_MCF_R1: Promotion Pricing (New).....	37
CRM_MCF_R1: Generic Articles (New).....	38
CRM_MCF_R1: Gift Cards (New).....	39
CRM_MCF_R1: Store Locator and In-Store Pickup (New).....	40
CRM_MCF_R1: Multichannel Scenario Campaign-Specific Attribute (New).....	41
Business Function SAP Multichannel Foundation for Multichannel Transactions...42	
CRM_MCF_CAR: Business Function SAP Multichannel Foundation for Multichannel Transactions (New).....	42
Interaction Center	43
Business Function Social Media Integration	43
CRM_SMI_INBOX: Business Function Social Media Integration in IC (New)	43
CRM_SMI_INBOX: Business Function Social Media Integration in IC (Enhanced for SP02).....	44
Business Function Service Configurator for Shared Services	45
CRM_SH SVC_2: Service Configurator for Shared Services (New)	45
Business Function HCM Shared Services Center - PA Services and Web Dynpro ABAP UI	46
CRM_SSC_EIC_4: HCM Shared Services Center - PA Services and Web Dynpro ABAP UI (New)	46
Business Function HCM Shared Services Center - Service Configurator	47
CRM_SSC_EIC_5: HCM Shared Services Center - Service Configurator (New)	47
Business Function IC Inbox Extensions 2	48
CRM_IC_INBOX_2: Business Function IC Inbox Extensions 2 (New for SP03).....	48
Analytics	53
Business Function Interactive Reporting	53
CRM_ANA_UI5: Business Function Interactive Reporting Using UI Development Toolkit for HTML5 (New)	53
Business Function Embedded Interactive and SAP HANA Live Reporting Analytics	54
CRM_EMBED_IR_ANA_UI: Embedded Interactive and SAP HANA Live Reporting Analytics (New for SP02)	54
Business Function SAP CRM HANA Live Reporting	55
CRM_ANA_OR_ODATA: SAP CRM HANA Live Reporting (New for SP02)	55
Country-Specific Functions.....	57
Business Function Golden Tax China	57
CRM_LOC_CN_1: Golden Tax China (New for SP01).....	57
SAP CRM for Industries: Cross-Industry Functions.....	58

Business Function Integration of SAP CC and SAP CI with the Provider Order	58
CRM_PROVORDERINT_2: Business Function Integration of SAP CC and SAP CI with the Provider Order (New)	58
CRM_PROVORDERINT_2: Customizing Replication of Technical Resource Types (New).....	60
CRM_PROVORDERINT_2: Back Office Role PROV-SALES (New)	61
CRM_PROVORDERINT_2; CRM_FCA_2: Generic Customizing of SAP for Telecommunications (New).....	62
CRM_PROVORDERINT_2: Product Purpose (New)	63
CRM_PROVORDERINT_2: Master Agreement (New).....	64
CRM_PROVORDERINT_2: Discounts (New)	66
CRM_PROVORDERINT_2: Mass Runs (New)	67
CRM_PROVORDERINT_2: Partner Agreement with Integration to SAP ERP (New)	69
CRM_PROVORDERINT_2: Counter Sharing (New)	71
CRM_PROVORDERINT_2: Provider Order and Contract API (New)	73
CRM_PROVORDERINT_2: Provider Order Template (New).....	76
CRM_PROVORDERINT_2: Provider Order and Contract Archiving (New)	77
CRM_PROVORDERINT_2: Update Pricing of Contracts (New)	78
CRM_PROVORDERINT_2: DIMa Object for Provider Contract (New).....	79
CRM_PROVORDERINT_2: SAP Jam Integration for Provider Contract (New).....	80
SAP CRM for Industries: Contract Accounts Receivable and Payable	81
Business Function FCC and Dispute Management for Contract AR/AP, 1	81
CRM_FCA_2: Business Function FCC and Dispute Management for Contract AR/AP, 1.....	81
CRM_FCA_2: Integration of Provider Contract from Billing Suite (New).....	83
CRM_FCA_2: Prepaid in Financial Customer Care (New)	84
CRM_FCA_2: Subapplication in Financial Customer Care (New).....	85
CRM_FCA_2: New Role for Financial Customer Care (New)	86
CRM_FCA_2: Display for Billing Detail Records (Enhanced).....	87
CRM_PROVORDERINT_2; CRM_FCA_2: Generic Customizing of SAP for Telecommunications (New).....	88
Business Function Business Partner ILM	89
BUPA_ILM_BF: Business Function Business Partner ILM (New)	89
BUPA_ILM_BF: Clean Up Inconsistencies in Business Purpose Status (New)	90
Business Function FS Business Partner Cleansing	91
CA_FSBP_CRM_CLEANSING_01: Business Function FS Business Partner Cleansing (New) ..	91
Business Function FS Business Partner Reconciliation	93
CA_FSBP_CRM_RECONCILIATION_01: Business Function FS Business Partner Reconciliation (New).....	93
Business Function FSBP CRM Area Menu & IMG	94
FSBP_CRM_MENU_IMG_01: Business Function FSBP CRM Area Menu & IMG	94
FSBP_CRM_MENU_IMG_01: BAdIs for Enterprise Services (New)	95
Distribution of Business Partner Data (Enhanced)	97
Business Function Harmonization of CRM Web Client UI	98
CRM_FS_BPHEAD_UI: Business Function Harmonization of CRM Web Client UI (New).....	98
Business Function CRM-FS, Guided Loan Origination Process	99
CRM_FS_NBRNWL_1: Business Function CRM-FS, Guided Loan Origination Process (New) ..	99
CRM_FS_NBRNWL_1: Loan Wizard (New).....	100
CRM_FS_NBRNWL_1: Banking Opportunity (New)	103

CRM_FS_NBRNWL_1: Banking Customer Quote (New).....	105
CRM_FS_NBRNWL_1: Personal Financial Statement (New).....	108
CRM_FS_NBRNWL_1: Banking Sales Contract (New).....	110
CRM_FS_NBRNWL_1: Usage of BRFplus (New).....	111
CRM_FS_NBRNWL_1: Case (Enhanced).....	113
CRM_FS_NBRNWL_1: Document Checklist (New).....	115
CRM_FS_NBRNWL_1: Enterprise Content Management Integration (New).....	117
CRM_FS_NBRNWL_1: Enterprise Services (New).....	118
CRM_FS_NBRNWL_1: New Features in Customizing for FS-AO (New).....	120
Business Function CRM-FS, Banking Customer Quote Enhancements	122
CRM_FS_NB_BCQ_1: Business Function CRM-FS, Banking Customer Quote Enhancements (New for SP03).....	122
CRM_FS_NB_BCQ_1: Banking Customer Quote (Enhanced for SP03).....	123
CRM_FS_NB_BCQ_1: New Features in Customizing for FS-AO (New for SP03).....	125
SAP CRM for Industries: Public Sector	126
Business Function Social Services, 2013 (SAP CRM)	126
CRM_IPS_4S_4: Business Function Social Services, 2013.....	126
CRM_IPS_4S_4: Decision Basis (New).....	127
CRM_IPS_4S_4: Composite Gross Entitlement Calculation (new).....	129
CRM_IPS_4S_4: Customer Message Handling (Enhanced).....	130
Business Function Social Services, 2013 (SAP ERP)	131
ERP_IPS_4S_4: Business Function Social Services, 2013 (New).....	131
ERP_IPS_4S_4: Replication Monitor for Decision Basis Modeling (New).....	132
ERP_IPS_4S_4: Entitlement Calculation Exit (Enhanced).....	133
ERP_IPS_4S_4: Decision Basis Data Archiving (New).....	134
SAP CRM for Industries: Utilities	135
Business Function Utilities Energy Management.....	135
CRM_UT_ER_3: Business Function Utilities Energy Management (New).....	135
CRM_UT_ER_3: Product Modeling for Utilities (New).....	138
CRM_UT_ER_3: Product Finder and Configurator (New).....	139
CRM_UT_ER_3: Price Object (New).....	140
CRM_UT_ER_3: Premise Overview (New).....	141
CRM_UT_ER_3: Meter Reading (Changed).....	145
CRM_UT_ER_3: Clarification Cases (New).....	148
CRM_UT_ER_3: Account Search and Maintenance (Enhanced).....	151
Business Function SAP Energy Demand-Side Management	153
CRM_UT_DSM_2: Business Function SAP Energy Demand-Side Management (New).....	153
CRM_UT_DSM_2: Eligibility Check (Enhanced).....	155
Business Function Product Transport for Utilities	156
CRM_UT_PROD_TRANS: Business Function Product Transport for Utilities (New for SP03) ..	156
Business Function Products Enhancements 1 for Utilities.....	158
CRM_UT_PROD_ENH_1: Business Function Products Enhancements 1 for Utilities (New for SP03).....	158
Business Function Utilities HANA Free Text Search	159
CRM_UT_HANA_SCH: Business Function Utilities HANA Free Text Search (New for SP03)...	159
SAP CRM for Industries: Healthcare	160

Business Function SAP CRM and Patient Management Integration	160
CRM_ISH_PM_1: Merging of Duplicate Accounts (Enhanced)	160
CRM_ISH_PM_1: Replication of Services and Service Groups from SAP ERP (New)	161
CRM_ISH_PM_1: Interaction Center WebClient for Healthcare (Enhanced).....	162
Business Function-Independent Features	163
WebClient UI Framework.....	163
Application Enhancement Tool - Usage of Deep Tables (New)	163
Corbu Skin (New)	164
Master Data	165
Duplicate Check for Business Partners on SAP HANA Database (New)	165
Installed Base Components (Enhanced).....	166
Attribute Input Help for Listing Items (Enhanced)	167
Basic Functions	168
Simulation Tool for the Transaction Tax Engine (Enhanced)	168
Sales	169
Product Proposals (Enhanced)	169
Fast Change for ERP Sales Documents (New)	170
Sales Professional Business Role (Enhanced for SP02).....	171
Service.....	172
Archiving Objects for Service (New)	172
Service Resource Planning with SAP liveCache (Changed)	173
Product Visualization with SAP Visual Enterprise Viewer (New).....	174
Interaction Center	175
Interaction Center Editors for E-Mails, Faxes, and Letters (Enhanced)	175
ICI Trace Analysis (Enhanced)	176
Standard Responses (Enhanced)	177
Virus Scan Profile for ICI Mail (New for SP02)	178
ABAP Push Channel (APC) Usage in Interaction Center (New for SP03)	179
Industries	180
Enterprise Services for FS-BP (New).....	180

Notices of Discontinuation

Mobile Sales and Service for Handheld Devices (Advance Notice of Discontinuation)

Use

As of the following releases, the mobile sales and service functions for handheld devices are no longer actively released due to lack of demand:

- SAP enhancement package 3 for SAP CRM 7.0
- SAP enhancement package 2 (SP09) for SAP CRM 7.0
- SAP enhancement package 1 (SP11) for SAP CRM 7.0
- SAP CRM 7.0 (SP14)
- SAP CRM 2007 (SP14)
- SAP CRM 5.0 (SP23)

Accordingly, the following business scenarios in SAP Solution Manager are obsolete:

- *Field Account and Contact Management with CRM Mobile Sales for Handheld*
- *Field Activity Management with Mobile Sales for Handheld*
- *Field Quotation and Order Management with CRM Mobile Sales for Handheld*
- *Field Sales with CRM Mobile Sales Online*

SAP anticipates that the functions will be fully discontinued in 2015. In case of queries in regard to this discontinuation, please create a customer message in the SAP Support Portal. Consider also SAP's current offering of mobile apps for use with SAP CRM.

Citrix Operation of Mobile Sales and Service for Laptop (Advance Notice of Discontinuation)

Use

As of the following releases, the option to run mobile sales and service functions for laptops on Citrix is no longer actively released due to lack of demand:

- SAP enhancement package 3 for SAP CRM 7.0
- SAP enhancement package 2 (SP09) for SAP CRM 7.0
- SAP enhancement package 1 (SP11) for SAP CRM 7.0
- SAP CRM 7.0 (SP14)
- SAP CRM 2007 (SP14)
- SAP CRM 5.0 (SP23)

SAP anticipates that the functions will be fully discontinued in 2015. In case of queries in regard to this discontinuation, please create a customer message in the SAP Support Portal.

Selling via eBay (Advance Notice of Discontinuation)

Use

As of the following releases, the functions for selling via eBay are no longer actively released due to lack of demand:

- SAP enhancement package 3 for SAP CRM 7.0
- SAP enhancement package 2 (SP09) for SAP CRM 7.0
- SAP enhancement package 1 (SP11) for SAP CRM 7.0
- SAP CRM 7.0 (SP14)
- SAP CRM 2007 (SP14)
- SAP CRM 5.0 (SP23)

Accordingly, the business scenario **Web Auctions: Selling via eBay in CRM** in SAP Solution Manager is obsolete.

SAP anticipates that the functions will be fully discontinued in 2015. In case of queries in regard to this discontinuation, please create a customer message in the SAP Support Portal.

SAP for Telecommunications: Sales and Order Management for Web Channel (Advance Notice of Discontinuation)

Use

Functions specific to order and contract processing using the Web shop application in SAP for Telecommunications are no longer actively released due to lack of demand. Accordingly, the business scenario ***Sales and Order Management in Web Channel*** in the context of SAP for Telecommunications in SAP Solution Manager is obsolete.

This applies as of the following releases:

- SAP enhancement package 3 for SAP CRM 7.0
- SAP enhancement package 2 (SP09) for SAP CRM 7.0
- SAP enhancement package 1 (SP11) for SAP CRM 7.0
- SAP CRM 7.0 (SP14)
- SAP CRM 2007 (SP14)
- SAP CRM 5.0 (SP23)

SAP anticipates that the functions will be fully discontinued in 2015. In case of queries in regard to this discontinuation, please create a customer message in the SAP Support Portal.

SAP for Telecommunications: Sales and Order Management for Dealer Channel (Advance Notice of Discontinuation)

Use

Functions specific to order and contract processing in the dealer application in SAP for Telecommunications are no longer actively released due to lack of demand. Accordingly, the business scenario ***Sales and Order Management in Dealer Channel*** in the context of SAP for Telecommunications in SAP Solution Manager is obsolete.

This applies as of the following releases:

- SAP enhancement package 3 for SAP CRM 7.0
- SAP enhancement package 2 (SP09) for SAP CRM 7.0
- SAP enhancement package 1 (SP11) for SAP CRM 7.0
- SAP CRM 7.0 (SP14)
- SAP CRM 2007 (SP14)
- SAP CRM 5.0 (SP23)

SAP anticipates that the functions will be fully discontinued in 2015. In case of queries in regard to this discontinuation, please create a customer message in the SAP Support Portal.

Master Data

Business Function Social Media Integration in Business Partner

CRM_SMI: Business Function Social Media Integration in Business Partner (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, the business function ***Social Media Integration in Business Partner*** (CRM_SMI) is available. With this business function you can assign social media users to accounts, groups, and contacts in the backend CRM system and in the interaction center. In a business-to-consumer scenario, this enables you to understand your customers better, based on their social media activities. You can use this information to adapt your sales, service, and marketing activities to individual customers.

The following features are available with this business function:

- Assignment of social media users to accounts, groups, and contacts in the WebClient UI
A new assignment block ***Social Media Users*** is available.
- Assignment of social media users to accounts, groups, and contacts in the Interaction Center

The assignment of social media users to business partners can be exchanged with non-SAP systems through the existing external interface for business partner data. No social media user data is exchanged.

With the related business function ***Social Media Integration in Interaction Center***, you can integrate social media posts into the interaction center.

Effects on Customizing

You have defined social media channels in Customizing for ***Customer Relationship Management***, under ***Master Data -> Business Partner -> Define Social Media Channels and User Accounts***.

See also

Release note **CRM_SMI_INBOX: Business Function Social Media Integration in IC (New)**

Business Function Reduction of TCO in Business Partner

CRM_TCO_1: Business Function Reduction of TCO in Business Partner (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, the business function ***Reduction of TCO in Business Partner*** (CRM_TCO_1) is available. This business function can help you to reduce total cost of ownership by supporting business users in finding relevant accounts and contacts more easily (reducing the number of duplicates created). In addition, it enables system administrators to set up data quality functions faster and to tailor them to the needs of their organization.

The business function provides the following benefits in detail:

- Business users can find the right accounts and contacts faster.
The search for accounts is enhanced with the additional search criteria sales organization, distribution channel, and division. This enables sales representatives, for example, to search for accounts that their sales organization does business with, not only accounts for which they themselves are responsible.
The search for accounts and contacts is enhanced with the new search criteria ***Account Status*** and ***Contact Status***. These statuses can be ***Active*** or ***Inactive***, based on what the organization considers an active or inactive account or contact. This is defined in Customizing for ***Customer Relationship Management***, under ***Master Data -> Business Partner -> Search -> Select Statuses That Define an Account as Inactive*** and ***Select Statuses That Define a Contact as Inactive***.
- System administrators can set up data cleansing faster and with greater flexibility.
All settings for data cleansing can now be accessed centrally in Customizing. Several features are more easily accessible and allow a more flexible setup. For example, you can define customer-specific variants for data cleansing (to determine which data is merged automatically or shown on the UI) and use these variants for different purposes.
You set up data cleansing to meet your requirements in Customizing for ***Customer Relationship Management***, under ***Master Data -> Business Partner -> Data Cleansing***.
- System administrators can set up tools for duplicate prevention faster.
You can access information about configuring a duplicate check and fuzzy search from a central point in Customizing for ***Customer Relationship Management***, under ***Master Data -> Business Partner -> Activate and Configure Fuzzy Search*** and ***Activate and Configure Duplicate Check***.

Business Function Marketing Permissions

CRM_MKT_PERMISSION: Exchange of Marketing Permission Data (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0 you can exchange marketing permission data between systems via middleware.

This function is relevant if you are using marketing permissions (provided with the business function ***Marketing Permissions*** (CRM_MKT_PERMISSION)).

The existing BDocs BUPA_MAIN and BUPA_REL include marketing permission attributes. IDoc enhancements allow you to use middleware to exchange accounts with marketing permission between SAP CRM and non-ERP systems.

See also

For more information on marketing permissions, see SAP Library for SAP Customer Relationship Management on SAP Help Portal at <http://help.sap.com/crm-core> -> **<Choose a release>** -> **Application Help** -> **Master Data** -> **Business Partners** -> **Functions** -> **Marketing Permission**.

CRM_MKT_PERMISSION: Marketing Permissions in Data Cleansing (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, marketing permissions for accounts (corporate, individual, and groups) and contacts are taken into account during data cleansing. You can decide which marketing permissions to retain when merging different or conflicting data.

This function is relevant if you are using marketing permissions (provided with the business function **Marketing Permissions** (CRM_MKT_PERMISSION)).

For more information about the logic of merging marketing permissions during data cleansing, see SAP Note 1712376.

See also

For more information on marketing permissions, see SAP Library for SAP Customer Relationship Management on SAP Help Portal at <http://help.sap.com/crm-core> -> <Choose a release> -> **Application Help** -> **Master Data** -> **Business Partners** -> **Functions** -> **Marketing Permission**.

Business Function Simple Search for Business Partners and Products

CRM_SEARCH_1: Business Function Simple Search for Business Partners and Products (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, the business function ***Simple Search for Business Partners and Products*** (CRM_SEARCH_1) is available. With this business function, you can integrate simple search into the search pages of master data business objects. This enables business users to search for master data by entering one or more search values in a single search field; a search that is common in the Internet.

Simple search can already be integrated into the **central search** field. However, by integrating the simple search into the master data search pages, you can also provide users with the functions that were previously only available in the advanced search results list for the relevant object.

Simple search is available for the following objects:

- Accounts
- Contacts
- Employees
- Products

The combination of a fast-entry search and the ability to execute functions and actions can enable users to work more efficiently. Whether you provide the advanced search or simple search to your users depends on the typical searches that they need to perform.

On search pages, users can switch easily between the simple search and the advanced search.

Effects on Customizing

To use the simple search for business partners or products, you need to configure Enterprise Search and simple search. For more information, see SAP Library for ***SAP Customer Relationship Management*** on SAP Help Portal at <http://help.sap.com/crm> -><choose release> -> ***Application Help -> WebClient UI Framework -> Enterprise Search Integration.***

You define the availability of the simple search for the individual master data objects in Customizing for ***Customer Relationship Management***, under ***UI Framework -> Enterprise Search Integration -> Define Availability of Simple Search in Business Object Search.*** For information about assigning the settings to a business role, see the documentation for the Customizing activity.

Business Function Usability Enhancements to Master Data

CRM_MD_CPM: Business Function Usability Enhancements to Master Data (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function ***Usability Enhancements to Master Data*** (CRM_MD_CPM) is available. With this business function, you can define personal value lists for business partner, business partner hierarchy, product, and product hierarchy attributes defined as part of value distribution. It is possible for the user to create, update, or delete personal value lists. You can use this function by enabling *Saved Searches* by using personalization in the **F4** help dialog box. This allows you to create saved searches for each object, which forms a kind of personal value list.

Business Function Enhancements to Listings

CRM_LST_CPM: Business Function Enhancements to Listings (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function ***Enhancements to Listings*** (CRM_LST_COM) is available. With this business function, the following new features are available:

- A new interface called the selection interface in which products are grouped based on the category they belong to and are displayed in the form of a hierarchy. The listing item assignment block has been restructured to easily differentiate between listed and delisted products. You can also switch between listing selection interface and listing maintenance interface.
- The option to upload listings from a comma separated value (CSV) file for new implementation markets.
- An overlap check to ensure two listing headers do not have overlapping validity period for the same planning customer.
- Copy attributes from one product to multiple products using the copy paste functionality.
- Filter products based on pre-defined criteria.

Effects on Existing Data

A central edit button is now available for the listing maintenance interface. Also, edit buttons are available for each assignment block.

Personalization option in both listing maintenance interface and listing selection interface now allows you to carry out the following functions:

- choose if technical IDs of the products should be displayed
- choose columns to be displayed
- adjust column width where applicable
- change the order of appearance of columns

Standard SAP print functionality is now enabled for listing objects in the listing maintenance interface.

To perform an automatic listings check and delete all delisted products, you make the required settings in Customizing activity **Assign Listing Procedures and Set PPR Indicator**.

Effects on Customizing

You make Customizing settings in the following Customizing activities:

- **Maintain Parallel Processing Parameters**
- **Maintain Product Categories**
- **Create Actions with Wizard**
- **Define Action Profiles and Actions**
- **Define Conditions**
- **Assign Action Profile to Condition Type**
- **BAdI: Product Categories, Filter Criteria for Products, and Tree**
- **BAdI: Product Category Hierarchy and Tree Attributes**
- **BAdI: Sales-Area-Specific Filter for Restricted Products**
- **BAdI: Additional Categories for Products**

- **BAdI: Default List of Business Partners**
- **BAdI: Listings Overlap**

Basic Functions

Business Function Search in Business Object Attachments

CRM_ES_BY_ATTACHMENT: Business Function Search in Business Object Attachments (New for SP02)

Use

As of the following releases, the business function *Search in Business Object Attachments* (CRM_ES_BY_ATTACHMENT) is available:

- SAP enhancement package 2 (SP10) for SAP CRM 7.0
- SAP enhancement package 3 (SP02) for SAP CRM 7.0

With this business function, you can search in the attachments of business objects using simple search. The system displays the matched attachments along with the matched business objects. Note, however, that you cannot sort and filter the matched attachments.

Search in attachments is available for the following business objects:

- Accounts
- Contacts

Effects on Customizing

You enable the system to search in attachments in Customizing for *Customer Relationship Management*, under *UI Framework -> Enterprise Search Integration -> Enable Search in Business Object Attachments*.

See also

For more information, see SAP Library for SAP CRM on SAP Help Portal at <http://help.sap.com/crm>. Choose a release and then *Application Help*. In SAP Library, choose *Business Functions for SAP Customer Relationship Management -> WebClient UI Framework -> Search in Business Object Attachments*.

For more information about simple search, see SAP Library for SAP CRM on SAP Help Portal at <http://help.sap.com/crm>. Choose a release and then *Application Help*. In SAP Library, choose *WebClient UI Framework -> Search Functions -> Simple Search*.

CRM_ES_BY_ATTACHMENT: Business Function Search in Business Object Attachments (Enhanced for SP03)

Use

As of SAP enhancement package 3 (SP03) for SAP CRM 7.0, business function *Search in Object Attachments* (CRM_ES_BY_ATTACHMENT) is enhanced to provide the search function for the following new business objects:

- Activity
- Installed Base
- Opportunity

You can also enable more business objects to perform search in attachments. For more information, see SAP Note 1950354.

See also

CRM_ES_BY_ATTACHMENT: Business Function Search in Business Object Attachments (New)

Marketing

Business Function Usability Enhancements to Marketing

CRM_MKT_CPM: Business Function Usability Enhancements to Marketing (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, the business function ***Usability Enhancements to Marketing*** (CRM_MKT_CPM) is available. With this business function, the following features are available:

- In the value distribution table of *Campaign* and *Campaign Element*, you can replace the *ID* with the *Description*. When you enter the *ID* and press **Enter**, the *ID* will be replaced with the *Description*.
- You can copy information from a Microsoft Excel file and paste it in the assignment blocks of the following elements:
 - *Purchase Goods/Services of Marketing Plan*
 - *Products, Purchase Goods/Services, and Value Distribution of Campaign*
 - *Products and Value Distribution of Campaign Element*
 - *Products, Product Groups, Product Category, and Purchase Goods/Services of Campaign*
- You can now select multiple *Products* or *Product Categories* in the value distribution table of *Campaign* and *Campaign Element*.
- You can now use the *Save and Back* function in the campaign, campaign element, marketing plan and marketing plan element screens to save the entire marketing object including planning data and return to the overview page of the corresponding marketing object in display mode.
- You can choose the planning hyperlink in the *Planning* assignment block of the overview pages of campaign, campaign element, marketing plan and marketing plan element to navigate to the detailed *Cost Planning* screen. The screen will open in display mode.
- You can now make configuration settings for a business role to view the marketing project *Hierarchy* by default while creating or opening a marketing object. You can choose to hide the hierarchy. You can make the settings in the Customizing activity, **Settings to Show Hierarchy by Default**.
- You can choose to completely expand and collapse the marketing project *Hierarchy*.
- You can now extract hierarchy of type/objectives/tactics for a marketing element in BW.
- You can now save incomplete lines of purchasing without triggering BDoc or a transfer to ERP. You can also view the status of every purchasing line to know if it can be transferred to ERP. You can change this status as soon as the purchasing line is complete. This allows you to release a planned campaign and TPM even when the purchase requests are not complete.
- You can now use the copy function for each line item in the *Purchase Goods/Services* assignment block. You can use this option to copy all fields other than the fields related to status.
- You can now search for a *Business Partner Hierarchy* in a single step by entering the description directly in the *Business Partner* field.

Business Function Creation of a Campaign and Target Group from an External System

CRM_SME_MKT_CPG: Business Function Creation of a Campaign and Target Group from an External System (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, the business function ***Creation of a Campaign and Target Group from an External System*** (CRM_SME_MKT_CPG) is available.

You can use this business function to create a campaign from an external system and transfer an address list (containing, for example, social media users) to SAP CRM and link these as a target group to the generated campaign. A SAP Jam group can also be created automatically for the campaign, which those involved can use to conduct discussions.

This business function includes the following features:

An RFC service is called from an external system and executes the following functions:

- An address list is transferred to SAP CRM.
- The RFC service calls **External List Management** (ELM) to create the addresses in the SAP CRM system as marketing prospects in the first instance and to generate a target group from these addresses.
- Subsequent processing for ELM is triggered by the SAP business workflow to create a new campaign and link the target group created by ELM to this campaign. However, you can also add an additional target group to an existing campaign.
- The RFC service creates a new SAP Jam group. The following information can be provided from an external system here:
 - Title of the address list
 - Explanation of why these addresses have been selected and the objectives to be achieved by performing the campaign.
 - E-mail address of the caller of the RFC service.

The RFC service can be called to reuse an existing SAP Jam group. You can also reuse a campaign that you have previously used here. If for example you use a campaign for a second time, the service attaches a second target group here.

The SAP Jam group is created so that the initiator, who is the caller of the RFC service, can collaborate with SAP CRM users and external participants involved in the process and inform those involved about any changes to the progress of the campaign.

When the SAP Jam group is created, the system automatically invites the initiator to the group if he or she has specified an e-mail address during the service call.

Additional participants can be invited to the SAP Jam group using a BAdI implementation with customer-specific coding.

Effects on Customizing

You make the Customizing settings for this function in Customizing for ***Customer Relationship Management*** under ***Marketing*** -> ***Creation of a Campaign from an External System***.

Business Function Social Media Integration in Marketing

CRM_SMI_MKT: Business Function Social Media Integration in Marketing (New for SP02)

Use

As of SAP enhancement package 3 (SP02) for SAP CRM 7.0, the business function ***Social Media Integration in Marketing*** (CRM_SMI_MKT) is available.

This business function makes the following available to you:

- **CRM_SMI_MKT: Marketing Prospect (Enhanced)**
- **CRM_SMI_MKT: Interaction Object (Enhanced)**
- **CRM_SMI_MKT: External List Management (Enhanced)**
- **CRM_SMI_MKT: E-Mail Format (Enhanced)**

See also

SAP Library for SAP Customer Relationship Management on SAP Help Portal at <http://help.sap.com/crm> -> <choose release> -> *Application Help* -> *Business Functions for SAP Customer Relationship Management* -> *Marketing* -> *Social Media Integration in Marketing*.

CRM_SMI_MKT: Marketing Prospect (Enhanced for SP02)

Use

As of SAP enhancement package 3 (SP02) for SAP CRM 7.0, business function **Social Media Integration in Marketing** (CRM_SMI_MKT), the marketing prospect can be used more flexibly and can store social media user data. The following features are provided:

- Editing, with value checks and input help for account data
You can edit marketing prospects until they have been converted to business partners. Messages inform you which data from the external list needs to be adjusted to match the data in your system. If you know that a marketing prospect corresponds with an existing account in your system, you can use the input help in the **Company ID** and **Company Name** fields to search for and enter the correct account.
- Social media data
The assignment block **Social Media User Data** is available. Social media data can be uploaded from an external list or entered manually.
- Interactions
The assignment block **Interactions** displays interaction objects that are automatically created during high-volume campaign execution to log contacts with prospects.

See also

SAP Library for SAP Customer Relationship Management on SAP Help Portal at <http://help.sap.com/crm> -> <choose release> -> *Application Help* -> *Master Data* -> *Business Partners* -> *Concepts* -> *Marketing Prospect*.

CRM_SMI_MKT: Interaction Object (Enhanced for SP02)

Use

As of SAP enhancement package 3 (SP02) for SAP CRM 7.0, you can use the following functional enhancement for the interaction object:

Creation of Individual Interaction Objects

In Customizing, you can select for high-volume campaigns that interaction object entries are created for business partners and marketing prospects involved. The respective campaigns are available in the business partner and marketing prospect data.

Effects on Customizing

You select the creation of interaction objects for business partners and marketing prospects in the SAP CRM Marketing Customizing settings under **Marketing -> Marketing Planning and Campaign Management -> Campaign Execution -> Define Communication Medium -> Define High-Volume Communication Medium**.

See also

SAP Library for SAP Customer Relationship Management on SAP Help Portal at <http://help.sap.com/crm> -> <choose release> -> *Application Help -> Marketing -> Campaign Management -> Campaign Execution -> Interaction Object*.

CRM_SMI_MKT: External List Management (Enhanced for SP02)

Use

As of SAP enhancement package 3 (SP02) for SAP CRM 7.0, you can use social media data for the External List Management (ELM). You can now create business partners and marketing prospects including their social media channels. Multiple social media channel assignments are allowed for each business partner or marketing prospect.

The following fields have been added to the ELM mapping fields:

- **Social Media Channel Code**
- **Social Media User ID**
- **Social Media User Profile Link**
- **Social Media User Account**
- **Social Media User Name**
- **Social Media E-Mail Address**
- **Gender**
- **Number of Followed Users**
- **Influence Score**

The assignment block **Social Media Users** displays the social media data for the business partner and the marketing prospect.

If you have implemented the standard duplicate check for business partners, this check runs when you create business partners or marketing prospects. In addition, you can use a Business Add-In (BAI) to define a duplicate check that runs when marketing prospects are uploaded from external lists.

Effects on Customizing

You can find the BAI for the duplicate check in Customizing for *Customer Relationship Management*, under *Master Data -> Business Partner -> Marketing Prospects -> BAI: Duplicate Check for Marketing Prospects*.

See also

SAP Library for Customer Relationship Management on SAP Help Portal at <http://help.sap.com/crm-core> -> <choose release> -> **Application Help -> Marketing -> Segmentation and List Management -> External List Management -> External List Management in SAP CRM**.

CRM_SMI_MKT: Personalized Mail (Enhanced for SP02)

Use

As of SAP enhancement package 3 (SP02) for SAP CRM 7.0, you can use social media attributes for personalized mails and high-volume personalized mails. The social media attributes are available for the usages *Internet Mails* and *Internet Mails (High-Volume)* by choosing the attribute categories *Marketing Prospect* and *Business Partner*.

You can now create mail forms for marketing prospects and business partners including the following social media attributes:

- ***Social Media Channel Code***
- ***Social Media User Account***
- ***Social Media E-Mail Address***
- ***Social Media User ID***
- ***Social Media User Name***
- ***Social Media User Profile Link***
- ***Gender***

See also

SAP Library for SAP Customer Relationship Management on SAP Help Portal at <http://help.sap.com/crm> -> <choose release> -> *Application Help* -> *Marketing* -> *Campaign Management* -> *Personalized Mails* -> *Attributes in Mail Forms*.

CRM_SMI_MKT: Business Function Social Media Integration in Marketing (Enhanced for SP03)

As of SAP enhancement package 3 (SP03) for SAP CRM 7.0, the business function **Social Media Integration in Marketing** (CRM_SMI_MKT) provides the following additional features:

- In the marketing prospect, marketing attributes can be edited.
- The OData service CRM_MKT_PROSPECT_ODATA is available in SAP CRM for example, for creating marketing prospect data based on website registration data.
- A qualification score for the marketing prospect can be created and updated based on individual scores for each interaction object category.
The success of marketing activities, measured by the score, can influence the decision for conversion to an account. You can use the program CRM_MKTHV_CONVERT_MP_TO_BP to execute a mass conversion of marketing prospects to accounts based on qualification scores.
- The following fields are available in the **Interactions** assignment block of the marketing prospect: **Category**; **Score** (hidden).
- Program CRM_MKT_PROSPECT_SMI_UPDATE is available for updating the social media user data that is stored with your marketing prospects.
This data is retrieved from the social media channels by means of APIs defined by the social media platforms. For more information about the program, see the program documentation in transaction SE38.

Effects on System Administration

You register the OData service CRM_MKT_PROSPECT_ODATA in Customizing for SAP NetWeaver under **Gateway -> OData Channel -> Administration -> General Settings -> Activate and Maintain Services** (transaction /IWFND/MAINT_SERVICE).

Effects on Customizing

Qualification Score

You can define the individual score for an interaction in Customizing. You can also use a Business Add-In (BAdI) to implement your own logic for calculating scores from interactions. You can find the score definition settings, including the BAdI in Customizing for **Customer Relationship Management**, under **Master Data -> Business Partner -> Marketing Prospects**:

- **Define Score for Interaction Objects**
- **BAdI: Customer-Specific Data for Interaction Objects**

Duplicate Check for OData Service

You can define a duplicate check that takes place when marketing prospects are created using the OData service. You can find the BAdI in Customizing for **Customer Relationship Management**, under **Master Data -> Business Partner -> Marketing Prospects -> BAdI: Duplicate Check for Marketing Prospects**.

See also

Release note **CRM_SMI_MKT: Business Function Social Media Integration in Marketing (New)**

SAP Library for SAP Customer Relationship Management on SAP Help Portal at <http://help.sap.com/crm> -><choose release> -> *Application Help -> Business Functions for SAP Customer Relationship Management -> Marketing -> Social Media Integration in Marketing*.

Sales

Business Function Integration with SAP TM (Opportunity to Agreement)

CRM_TM_O2A: Integration with SAP TM (Opportunity to Agreement) (New for SP02)

As of SAP enhancement package 3 (SP02) for SAP CRM 7.0, the business function *Integration with SAP TM (Opportunity to Agreement)* (CRM_TM_O2A) is available. With this business function, you can use the following features:

- Use service products from SAP Transportation Management (SAP TM) system in opportunities
- Create forwarding agreement quotations from opportunities
- Map items in opportunities to items in forwarding agreement quotations
- In a corporate account, you can see the following SAP TM business document details of a customer:
 - Forwarding agreements
 - Forwarding agreement quotations
 - Forwarding orders
 - Forwarding quotations
 - Forwarding settlement documents

You can also create or search for the following SAP TM business documents:

- Forwarding agreements or forwarding agreement quotations
- Forwarding quotations
- Service products or service product catalogs
- Estimate forwarding charges

See also

- In SAP Library on SAP Help Portal at <http://help.sap.com/transportationmanagement> -> <Choose a release after SAP Transportation Management 9.0> -> **Application Help**, see the following help documents:
 - **SAP Transportation Management (SAP TM)**
 - **Service Product Catalogs under SAP Transportation Management (SAP TM) -> Master Data -> Charge Management and Service Product Catalogs -> Setup of MD for Charge Management and SP Catalogs**
 - **Agreement Management** under **SAP Transportation Management (SAP TM)**
 - **Forwarding Quotation** under **SAP Transportation Management (SAP TM) -> Forwarding Order Management**
- For more information about the business function, see SAP Library for **Customer Relationship Management** under **Business Functions for SAP Customer Relationship Management -> Sales -> Integration to Transportation Management (Opportunity to Agreement)**.
- For more information about Integration with SAP TM, see SAP Library for **Customer Relationship Management** under **Sales -> Opportunity Management -> Integration with SAP Transportation Management**.

Service

Business Function Sales and Service

CRM_SLS_SRV_1: Prediction of Service Duration and Service Parts (Enhanced)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function *Sales and Service* (CRM_SLS_SRV_1), you can predict service duration and service parts based on service confirmation data residing in the SAP CRM system, in an in-memory database. Previously, you needed to extract data to the SAP Business Information Warehouse (SAP BW), where it was aggregated to calculate predictive data.

The option of extracting data to SAP BW is still supported as alternative to using an in-memory database.

Effects on Customizing

You enable prediction based on data in an in-memory database by activating the enhancement implementation SERVICE_PREDICTION_DIRECT (Service Prediction with Direct Access). You do this in Customizing for ***Customer Relationship Management***, under ***Transactions -> Settings for Service Transactions -> Prediction of Service Parts and Service Duration -> BAdI: Prediction of Services Parts and Service Duration***.

You also need to complete the activity ***Specify Minimum Number of Data Records Required for Prediction*** in the above Customizing section.

CRM_SLS_SRV_1: Map Integration in Service Resource Planning (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **Sales and Service** (CRM_SLS_SRV_1), map integration is available for displaying resources, demands, and assignments in service resource planning.

Effects on System Administration

To use map integration, you must install the SAP Visual Business 2.0 application.

Effects on Customizing

You set up map integration in Customizing for Customer Relationship Management, in the section **Workforce Deployment -> Settings for Service Resource Planning -> Map Integration**.

See also

For more information, see SAP Library for SAP CRM on SAP Help Portal at <http://help.sap.com/crm> -> SAP Enhancement Package 3 for SAP CRM 7.0 -> Application Help -> SAP Customer Relationship Management -> Service -> Service Resource Planning -> Map Integration

Business Function Service Request Enhancements

CRM_ITSM: Business Function Service Request Enhancements (Enhanced)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function ***Service Request Enhancements*** (CRM_ITSM), you can define decision-based checklists.

Previously only simple checklists were available to support step-by-step processing. Decision-based checklists in addition allow you to choose the outcome of a step, which influences the next step and, therefore, the flow and actual composition of the checklist. The steps in a decision-based checklist can also contain links to external Web sites or internal systems.

Effects on Customizing

You define decision-based checklists in Customizing for ***Customer Relationship Management***, under ***Transactions -> Basic Settings -> Checklist Settings -> Define Checklist Profiles***. Here, you can define both simple and decision-based checklists. You define links in the activity ***Define Logical Links to Be Used in Decision-Based Checklists***.

For decision-based checklists, you define triggers and assign them to a checklist step. A trigger appears as a button on the UI and can change the status of the checklist step to ***Completed***. It can also start actions, for example, sending a status report by e-mail.

See also

SAP Library for *SAP Customer Relationship Management* on SAP Help Portal at <http://help.sap.com/crm> -> <choose release> -> ***Application Help -> SAP Library -> Service -> Service Request Management -> Processing Service Requests -> Checklist***.

Multichannel Integration

Business Function SAP Multichannel Foundation for SAP CRM

CRM_MCF_R1: Business Function SAP Multichannel Foundation for SAP CRM (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0 the business function ***SAP Multichannel Foundation for SAP CRM*** (CRM_MCF_R1) is available.

With this business function, you can ensure a harmonized customer experience across all sales channels. SAP Multichannel Foundation makes sales, marketing, and service data available in a consistent manner for interaction center (IC), SAP Web Channel Experience Management, and SAP Retail (SAP ERP).

Note: SAP Web Channel Experience Management and SAP Retail (SAP ERP) are not part of SAP CRM. These applications are licensed separately and must be installed separately.

The benefits of this business function are as follows:

- Improved transfer of merchandise category hierarchies from SAP ERP to SAP CRM
- Ability to determine promotions created in SAP Retail (SAP ERP) in multiple channels
- Improved usability when searching for, and selecting, generic articles and variants that were created in SAP Retail (SAP ERP)
- Availability of gift cards for sale and redemption by agents in the IC, and by sales agents processing orders offline
- Introduction of store locator in the IC, and possibility of designating sales order items for in-store pickup
- Ability to carry out SAP Retail (SAP ERP) promotions as part of a SAP CRM campaign

For more information, see the following release notes:

- **CRM_MCF_R1: Transfer of Merchandise Category Hierarchies (New)**
- **CRM_MCF_R1: Promotion Pricing (New)**
- **CRM_MCF_R1: Generic Articles (New)**
- **CRM_MCF_R1: Gift Cards (New)**
- **CRM_MCF_R1: Store Locator and In-Store Pickup (New)**
- **CRM_MCF_R1: Multichannel Scenario Campaign-Specific Attribute (New)**

Effects on System Administration

You use the ***Retail Interaction Center Agent*** navigation profile to access the ***Gift Cards***, ***Store Locator***, and ***POS Transactions*** work centers in the IC user interface.

See also

SAP Library for SAP CRM on SAP Help Portal at <http://help.sap.com/crm>. Choose a release and then ***Application Help***. In SAP Library, choose ***SAP Customer Relationship Management -> Business Functions for SAP Customer Relationship Management -> Sales -> SAP Multichannel Foundation for SAP CRM***.

CRM_MCF_R1: Transfer of Merchandise Category Hierarchies (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0 improved transfer of merchandise category hierarchies is available.

When you transfer material groups from SAP ERP to SAP CRM in a retail business scenario, the hierarchical structure is retained and displayed in SAP CRM as a tree structure. This makes it easier to locate particular items when maintaining master data, and also facilitates activities such as campaign planning and the maintenance of loyalty rules.

See also

- Main release note for business function **SAP Multichannel Foundation for SAP CRM**
- SAP Library for SAP Customer Relationship Management on SAP Help Portal at <http://help.sap.com/crm>. Choose a release and then **Application Help**. In SAP Library, choose **Master Data -> Products -> Functions -> Data Exchange -> Replicating Product Hierarchies from SAP ERP to SAP CRM**.

CRM_MCF_R1: Promotion Pricing (New)

Use

As of SAP enhancement package for 3 for SAP CRM 7.0 promotion information is available in SAP CRM sales orders.

When a product is added to a sales order and a promotion exists for the product, the promotion ID is included in the sales order details. The promotion ID is also included when the sales order is transferred from SAP CRM to SAP ERP. The availability of the promotion information helps you to analyze the success of the promotion.

Effects on Existing Data

The **Promotion ID** column has been added to the **Items** assignment block, and the **Promotion ID** field has been added to the **Sales Order Item** overview page.

Effects on Customizing

To make promotion pricing available in SAP CRM, do the following in Customizing:

- Set up CRM Middleware for SAP CRM and SAP ERP by making settings under **Customer Relationship Management -> CRM Middleware and Related Components -> Generating Industry Specific Objects and Services** and **Communication Setup**
- Add the price or discount condition for the promotion to the pricing procedure in **Create Pricing Procedure**

See also

- Main release note for business function **SAP Multichannel Foundation for SAP CRM**
- SAP Library for SAP Customer Relationship Management on SAP Help Portal at <http://help.sap.com/crm>. Choose a release and then **Application Help**. In SAP Library, choose **Basic Functions -> Pricing -> Condition Maintenance-> Promotion Pricing in Sales Orders**.

CRM_MCF_R1: Generic Articles (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0 improvements are available for creating orders that include generic articles.

Whereas previously you had to enter the variant ID to add a generic article to an order, you can now search for generic articles and select variants. You can also filter search results on a product characteristic to reduce the number of variants shown for a generic article.

Effects on Existing Data

When variants exist for a product, you can see them in the following places:

- In the product search results as an expandable list
- In the dialog box used for searching for products to add to a sales order

See also

- Main release note for business function **SAP Multichannel Foundation for SAP CRM**
- SAP Library for SAP Customer Relationship Management on SAP Help Portal at <http://help.sap.com/crm>. Choose a release and then **Application Help**. In SAP Library, choose **Master Data -> Products -> Concepts -> Generic Articles**.

CRM_MCF_R1: Gift Cards (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0 gift cards are available.

Customers can now purchase gift cards as separate products from the interaction center (IC). Gift cards purchased either from the IC, from a Web shop, or from a retail location can be redeemed by the customer by contacting an IC agent, or by submitting orders for offline processing by a sales agent.

Once gift cards have been fully redeemed or have exceeded their expiration date, you can archive them.

Effects on Existing Data

When you create sales orders, you use the **Gift Cards** assignment block to search for gift cards belonging to the customer, and then add them to the order to offset the total amount.

The system creates a gift card account for each gift card purchased. You access gift card accounts in the following ways:

- From the **Gift Cards** search page
- From the **Gift Cards** assignment block in the **Sales Order** overview page

Effects on Customizing

To use gift cards, you need to do the following in Customizing for **Customer Relationship Management**:

- Made settings for gift cards in **Gift Cards**.
- Activated the gift card process for the transaction type that you use. You have also assigned the action profile ORDER_WEC_GIFTCARD to the transaction type. You do both in **Define Transaction Types**.
- Made the appropriate settings for copying control of sales transaction to return and complaint to return, for items that contain gift cards. This is done to prevent the return of gift cards. You make these settings in **Define Copying Control for Item Categories**.
- Defined the sender address for the e-mail with the gift card code that is sent to the recipient of the gift card in **Maintain Sender Addresses for E-Mail**.
- Enabled customers to enter a gift message for the recipient by assigning the text determination procedure **Sales Order Item with E-Mail** (ORDER002) to the item category that you use for gift cards. You do this in **Define Item Categories**, in the **Profiles** assignment block.
- If using pricing in SAP CRM, defined the condition types in **Create Condition Types**.

See also

- Main release note for business function **SAP Multichannel Foundation for SAP CRM**
- SAP Library for SAP Customer Relationship Management on SAP Help Portal at <http://help.sap.com/crm>. Choose a release and then **Application Help**. In SAP Library, choose **Basic Functions -> Gift Cards**.

CRM_MCF_R1: Store Locator and In-Store Pickup (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0 store locator and in-store pickup functionality are available in the interaction center (IC).

You can now do the following:

- Search for stores nearby the customer, and retrieve store information
- Check product availability in stores
- Designate items for in-store pickup
- Designate items to be delivered to the store for eventual in-store pickup

Effects on Existing Data

You access the store locator from the navigation bar on the WebClient UI. Store search results include the address, hours of operation, and details relating to the store type.

When creating a sales order, you can use the ***In-Store Pickup*** column in the ***Items*** assignment block to specify the shop from which the customer will pick up the item. When you designate an item for in-store pickup, the ***Availability*** column changes to show the in-store availability of the item.

The ***Check Availability in Stores*** button on the product search results page allows you to search for stores that have the selected product in stock. From these results you can select a store and then use it as the basis for creating a sales order to pick up the product.

The ***E-Mail Store Information*** button on the store search results page allows you to send store information to customers.

Effects on Customizing

To use the store locator and in-store pickup features, do the following in Customizing for *Customer Relationship Management*:

- Define usage types for business partner relationship categories in **Define Store Usage Types**.
- Define settings for store distances, specify partner functions and store usage types for in-store pickup and delivery locations, and specify the mail form to use for e-mailing store information in **Define Settings for Store Locator and In-Store Pickup**.

To define countries, use **Insert Regions**.

See also

- Main release note for business function **SAP Multichannel Foundation for SAP CRM**
- SAP Library for SAP Customer Relationship Management on SAP Help Portal at <http://help.sap.com/crm>. Choose a release and then **Application Help**. In SAP Library, choose **Interaction Center -> Interaction Center WebClient -> Store Locator and In-Store Pickup**.

CRM_MCF_R1: Multichannel Scenario Campaign-Specific Attribute (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, the multichannel scenario campaign-specific attribute is available.

You can use the multichannel scenario campaign-specific attribute in SAP CRM to enable SAP Retail (SAP ERP) promotions to be carried out as part of a SAP CRM campaign.

Effects on Data Transfer

The attribute triggers the creation of a higher-level promotion when a campaign is replicated to SAP Retail (SAP ERP). The higher-level promotion inherits the campaign information from the replicated SAP CRM campaign.

See also

Main release note for business function **SAP Multichannel Foundation for SAP CRM**.

Business Function SAP Multichannel Foundation for Multichannel Transactions

CRM_MCF_CAR: Business Function SAP Multichannel Foundation for Multichannel Transactions (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0 the business function ***SAP Multichannel Foundation for Multichannel Transactions*** (CRM_MCF_CAR) is available.

With this business function, interaction center (IC) agents can search for, and display, point-of-sale (POS) transaction data from retail stores. POS transaction data is stored in SAP Customer Activity Repository, in the multichannel sales repository. SAP Customer Activity Repository is an application that is not part of SAP CRM. It is separately licensed and must be separately installed.

Effects on Existing Data

IC agents use the ***POS Transactions*** work center in the IC user interface to search for POS transactions. They can also view purchases that customers have made in-store by checking the ***POS Transaction History*** assignment block in the account fact sheet, and the ***POS Transactions*** assignment block in the account overview page.

Effects on Customizing

To access POS transaction data, you need to specify the connection to SAP Customer Activity Repository. You do this in Customizing for ***Customer Relationship Management*** in ***Define Connection to SAP Customer Activity Repository***.

If you have specific data requirements and need to change the delivered queries that retrieve data from the SAP HANA® database connected to SAP Customer Activity Repository, you do this in Customizing for ***Customer Relationship Management*** in ***BAdI: Multichannel Sales Data Retrieval***.

See also

SAP Library for SAP CRM on SAP Help Portal at <http://help.sap.com/crm>. Choose a release and then ***Application Help***. In SAP Library, choose ***SAP Customer Relationship Management -> Business Functions for SAP Customer Relationship Management -> Sales -> SAP Multichannel Foundation for Multichannel Transactions***.

Interaction Center

Business Function Social Media Integration

CRM_SMI_INBOX: Business Function Social Media Integration in IC (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, the business function *Social Media Integration in Interaction Center* (CRM_SMI_INBOX) is available. With this business function, you can listen to and engage with your customers through the social media that they use to communicate with peers.

With the related business function *Social Media Integration in Business Partner*, you can assign social media users to accounts, groups, or contacts in the interaction center.

The following features are available with this business function:

- Retrieve posts from predefined social media channels
- Analyze post sentiment
- Map social media users to accounts in SAP CRM
- Trigger follow-up actions, including replying to posts and creating transactions (for example, service requests)

Effects on Customizing

You make the Customizing settings for this function in Customizing for *Customer Relationship Management*, under *Basic Functions -> Social Media*.

See also

For more information, see SAP Library for SAP CRM on SAP Help Portal at <http://help.sap.com/crm>. Choose a release and then *Application Help*. In SAP Library, choose *Interaction Center -> Interaction Center WebClient -> Social Media*

CRM_SMI_INBOX: Business Function Social Media Integration in IC (Enhanced for SP02)

Use

As of SAP enhancement package 3 SP02 for SAP CRM 7.0, the following features are available with the business function *Social Media Integration in Interaction Center* (CRM_SMI_INBOX):

- You can search social media posts by description.
- You can run the report CRM_SOC_DATA_MIGRATION_TO_UC so that when you search by description, you can search for posts that you have already retrieved before you upgrade to CRM 7.0 EHP3 SP02.
- The *Reference* function and the *Reference (Extended)* function are now supported for social media posts.
- With the BAdI **Text Analysis of Social Media Post**, the following new action is supported:

Categorize the retrieved posts based on text analysis

See also

CRM_SMI_INBOX: Business Function Social Media Integration in IC (New)

Business Function Service Configurator for Shared Services

CRM_SHSVC_2: Service Configurator for Shared Services (New)

Use

As of SAP Enhancement Package 3 for SAP CRM 7.0 the business function *Service Configurator for Shared Services* (CRM_SHSVC_2) is available. With this business function, you can further integrate CRM Interaction Center WebClient with ERP and use additional features provided for process-based checklists in service requests.

Service Configurator is an enhancement based on the standard checklist features in CRM Interaction Center WebClient. This feature enables some checklist functions that require more integration with ERP applications such as ERP Financials. Service Configurator aims to build a process-based experience where business users can perform ERP Financials tasks while they follow the steps in the checklist of a service request.

To achieve this, Service Configurator uses the following decision-based checklist features:

- Flexible definition of processes and steps
- Ability to include work instructions, responsible partners, comments, and other information in processes and steps
- Ability to include links to ERP transactions and trigger actions in processes and steps
- CRM Application Enhancement Tool Technology (AET)

Based on these features, this business function brings more ERP functionality to service request checklists in these ways:

- **Accessing ERP functions from service requests:**
The business user can fill out a process-specific form with fields from the ERP system, and can select values by using the search help that is sourced from ERP data.
- **Validating user input against ERP data:**
Validation can be performed on user input when the business user saves a service request or executes a checklist step.
- **Submitting process-specific forms to ERP:**
The business user can submit a process-specific form to the ERP system to launch a transaction in the ERP system. Depending on the configuration, the user can either send the form data off to the ERP system or launch an ERP transaction remotely in the service request.

Effects on Existing Data

This business function does not have impact on existing data. However, the user interface for the dependent extended checklist in CRM Interaction Center WebClient has been reworked for usability and functionality reasons.

Effects on Customizing

You make the Customizing settings for this function in Customizing for Accounting (CRM-IC-ACO), in Service Configurator.

These Customizing settings require that you configure the following Customizing activity first:

Customer Relationship Management->Transactions->Basic Settings->Checklist Settings

Business Function HCM Shared Services Center - PA Services and Web Dynpro ABAP UI

CRM_SSC_EIC_4: HCM Shared Services Center - PA Services and Web Dynpro ABAP UI (New)

Use

As of SAP enhancement package 3 for CRM 7.0 (BBP CRM), the business function *HCM Shared Services Center - PA Services and Web Dynpro ABAP UI* (CRM_SSC_EIC_4) is available. This business function is part of the HR enhancements. With this business function, the Shared Services Framework (SSF) is integrated with the renovated Personnel Administration (PA) services and the new HCM Processes and Forms (HCM P&F) Web Dynpro ABAP UI.

The Shared Service Center (SSC) agents can launch the new PA services and HCM P&F process with Web Dynpro UI from Shared Services Framework.

Renovated PA Service Integration with SSF HR

A Shared Service Center (SSC) agent can access this application from a service request to launch PA services for an employee.

The following set of PA services are available on the standard launchpad:

- Personal Information
 - Address
 - Personal Data
 - Bank Details
 - Family members/Dependents
- Communication

Customers can configure new PA services, if required.

For more information, see the SAP Library under *SAP Business Suite -> SAP Customer Relationship Management -> SAP Enhancement Package 3 for SAP CRM 7.0 -> Application Help -> Interaction Center -> Interaction Center WebClient -> Shared Services Framework -> Integration with SAP ERP -> Shared Services Framework for HR -> Integration with SAP HCM -> Integration of PA Launchpad in Business Context of Service Request.*

Renovated HCM P&F Integration with SSF HR

With the integration of this application, an SSC agent can now launch the new HCM P&F process with Web Dynpro ABAP UI from SSF HR.

For more information, see the SAP Library under *SAP Business Suite -> SAP Customer Relationship Management -> SAP Enhancement Package 3 for SAP CRM 7.0 -> Application Help -> Interaction Center -> Interaction Center WebClient -> Shared Services Framework -> Integration with SAP ERP -> Shared Services Framework for HR -> Integration with SAP HCM -> Integration of HCM Processes and Forms Web Dynpro ABAP UI in SSF-HR.*

See also

For details on the new HCM P&F alternate UI, refer to the SAP Library under *SAP Business Suite -> SAP ERP Add-Ons -> HR Renewal 1.0 -> Application Help -> SAP ERP Central Component -> Human Resources -> Shared services -> HR Administrative Services -> Web Dynpro ABAP UI (Alternative UI).*

Business Function HCM Shared Services Center - Service Configurator

CRM_SSC_EIC_5: HCM Shared Services Center - Service Configurator (New)

Use

As of SAP enhancement package 3 for CRM 7.0 (BBP CRM) the business function HCM Shared Services Center - Service Configurator (CRM_SSC_EIC_5) is available. With this business function, the Shared Services Framework (SSF) enables you to control and model HR processes as per the Shared Service Organization (SSO) requirements.

Service Configurator

The Service Configurator integrates SAP CRM Decision-Based Checklist and SAP HCM Processes and Forms, which enables SSO to control and model their processes which involves multiple parties, some within or some outside the organization. The benefit of this integration for SSO goes beyond modeling & controlling a process.

- SLAs can be tracked for the complete process so that the SSO can report on these activities.
- The system leverages already existing HCM P&F processes and remodels these processes according to the requirements of the SSO, including SSO-relevant activities in the process.

Using service configurator you can also:

- Integrate HCM processes to a service request.
- Control the SSO backend process by adding manual and/or automated steps to existing HCM processes. These steps can be added at the beginning, in the middle, or at the end of an HCM process.

See also

For more information, see the SAP Library under *SAP Business Suite -> SAP Customer Relationship Management -> SAP Enhancement Package 3 for SAP CRM 7.0 -> Application Help -> Interaction Center -> Interaction Center WebClient -> Shared Services Framework -> Integration with SAP ERP -> Shared Services Framework for HR -> Service Configurator - Integration with HCM Processes and Forms.*

Business Function IC Inbox Extensions 2

CRM_IC_INBOX_2: Business Function IC Inbox Extensions 2 (New for SP03)

Use

As of SAP enhancement package 3 (SP03) for SAP CRM 7.0, the business function ***IC Inbox Extensions 2*** (CRM_IC_INBOX_2) is available.

To use this business function, you must also activate the business function ***IC Inbox Extensions*** (CRM_IC_INBOX).

To use the features that are specific to the accelerated agent inbox (inbox) search that is based on SAP HANA content, you must ensure that the following requirements have been met:

- SAP HANA is your primary or secondary database.
- You have activated the business function ***IC Inbox Extensions and Acceleration*** (CRM_IC_INBOX_ACC).
For more information, see the release note **CRM_IC_INBOX_ACC: Business Function IC Inbox Extensions and Acceleration**.
- You have installed the add-on SAP HANA CRM IC INBOX ACC 2.0 and set up the accelerated inbox search.
For more information, see SAP Library on SAP Help Portal at <http://help.sap.com/crm> -> <Choose relevant release> -> ***Application Help*** -> ***Interaction Center*** -> ***Interaction Center WebClient*** -> ***Agent Inbox in the Interaction Center WebClient*** -> ***Accelerated Inbox Search*** -> ***Setting Up the Accelerated Inbox Search***.
- To integrate social media in the accelerated inbox search, you have activated the business function ***Social Media Integration in Interaction Center*** (CRM_SMI_INBOX).
For more information, see the release note **CRM_SMI_INBOX: Business Function Social Media Integration in IC**.

With the business function ***IC Inbox Extensions 2***, you can activate the following inbox features:

Inbox Item Type for Outbound Correspondence

You can use the inbox item type for outbound correspondence to search for outbound e-mails (non-ICI-based), fax messages, and letters created in the interaction center (IC) and linked to an interaction record, as well as outbound e-mails created by the E-Mail Response Management System (ERMS). The inbox item type for outbound correspondence is available in the non-accelerated and in the accelerated inbox search.

Social Media Integration in Accelerated Inbox Search

You can use the accelerated inbox search to search for social media posts.

Predefined Inbox Search Tables

You can use predefined inbox search tables that contain the inbox search attributes and inbox result attributes that are relevant to specific inbox item types.

Predefined inbox search tables are available in the non-accelerated inbox search and in the accelerated inbox search for the following inbox item types:

- ***Inbox Item: Workitem - Inbound Email, Fax and Letter***
Inbox search table for work items (CRMD_AUI_WI_INDXX)
- ***Inbox Item: Outbound Correspondence***

Inbox search table for outbound correspondence (CRMD_AUI_OUTCORR)

Note that for outbound correspondence, the predefined inbox search table is mandatory for all types of inbox searches.

- **Inbox Item: OneOrder**

Inbox search table for business transactions (CRMD_AUI_BTIDX)

The inbox search table for business transactions has already been introduced for the accelerated inbox search with the business function **IC Inbox Extensions and Acceleration** (CRM_IC_INBOX_ACC) and is now also available for the non-accelerated inbox search.

Processing Data for Inbox Search Tables

You can use the transaction **Process Data for Inbox-Specific Searches** as a single point of access for processing the data for the various predefined inbox search tables. You can access the transaction in the SAP GUI, on the **SAP Easy Access** screen under **Interaction Center -> Interaction Center WebClient -> Administration -> Agent Inbox -> Process Data for Inbox-Specific Searches**.

In the transaction, you can upload the data for the relevant main categories to the predefined inbox search tables. You can also remove the data for the relevant main categories from the predefined inbox search tables, as required.

You can display the following current figures:

- **Source Entries**

Number of entries in the tables based on which the corresponding inbox search table is updated

The inbox item type for outbound correspondence does not support this feature.

- **Target Entries**

Number of entries in the inbox search table that is being updated

The following features of the transaction are specific to the accelerated inbox search and are only available if you have implemented the accelerated inbox search and defined an acceleration profile in the Customizing activity **Define Inbox Acceleration Profiles**:

- **Acceleration Profile**

Choose the corresponding acceleration profile.

- **Replicated Entries**

Number of entries that have been replicated to the corresponding predefined inbox search table in the SAP HANA content for the accelerated inbox search

The data replication is only performed if you are using SAP HANA as your secondary database.

For more information about the transaction **Process Data for Inbox-Specific Search Tables**, see SAP Library on SAP Help Portal at <http://help.sap.com/crm> -> <Choose relevant release> -> **Application Help -> Interaction Center -> Interaction Center WebClient -> Agent Inbox in the Interaction Center WebClient -> Inbox Search -> Predefined Inbox Search Tables**.

Note that the **SAP Easy Access** transaction **Process Data for Inbox-Specific Searches** replaces the **SAP Easy Access** transaction **Load Business Transaction Data for Accelerated Search** that provided less functions.

Advanced Search

The **advanced search** has been enhanced. The search attributes have been enabled for multiple use, and the appropriate search operators have been provided. Note that the selection of search operators has been limited to match the broad variety of main categories.

The following search attributes have not been enabled for multiple use:

- **Category ID**
- **Reserved**
- **Status** if used in combination with main categories related to ERP sales orders

Search Attributes **Time Period** and **Date Type**

The **Time Period**, **Date Type**, **From**, and **To** search attributes in the advanced search have been replaced by the following search attributes:

- **Creation Period**
- **Change Period**
- **Due Period**
- **Created On**
- **Changed On**
- **Due On**

The **Time Period**, **Date Type**, and **From/To** search attributes in the standard search have been replaced by the following search attributes:

- **Creation Period** and **From/To**
- **Change Period** and **From/To**
- **Due Period** and **From/To**

The following additional time periods are available for the advanced search and the standard search:

- **Next 3 Days**
- **Next 7 Days**
- **Next 14 Days**
- **Next 30 Days**

In the Customizing activity **Define Inbox Profiles**, you can define which time periods are available for the new time period search attributes in the inbox search.

Note the following:

- The entries in the fields **Time Period** and **Date Type** in the quick search definition are used as values for the search attributes **Creation Period** and **Due Period** in the advanced and standard search.
The entries in the fields **Date Type**, **From**, and **To** in the quick search definition are used as values for the following search attributes:
 - **Creation Period (From/To)** and **Due Period (From/To)** in the standard search
 - **Created On** and **Due On** in the advanced search
- Saved searches that contain at least one of the following search attributes cannot be displayed or used after the business function has been activated:
 - **Time Period**
 - **Date Type**
 - **From**
 - **To**

- **Sort By (2)**

Search Attribute *Recipient Address*

The ***Recipient Address*** search attribute has been enabled for the work item search (inbound e-mails, fax messages, and letters). The search attribute can also be used to search for outbound correspondence (outbound e-mails, fax messages, and letters).

Sort Attribute *Employee Responsible*

The sort attribute ***Employee Responsible (ID)*** has been replaced by ***Employee Responsible (Name)***.

Maximum Number of Results

You can use the ***Maximum Number of Results*** function on the ***Inbox*** page to define the number of search results. For example, you could reduce the number of search results to improve the search performance.

In the Customizing activity ***Define Inbox Profiles***, you can define the default values and range of user entries for the ***Maximum Number of Results*** field.

Reset

You can use the ***Reset*** function on the ***Inbox*** page to reset the inbox search criteria and the inbox result list to the initial state:

- The ***Quick Search*** field is cleared.
- The search criteria is reset to the predefined combination of search fields (relevant to advanced search only), and the field values are cleared.
- The ***Maximum Number of Results*** field is reset to the default setting.
- The result list is cleared, and the sorting and the filtering are reset to the initial state.
Note that personalization settings for the result list and the selected display type (table or tree) are not reset.

Search Attribute Validity Check for Accelerated Case Searches

In the accelerated inbox search, main categories related to cases do not support a combination of the search attributes ***Account***, ***Assigned To***, and ***Employee Responsible***. The corresponding searches previously did not produce any results. These searches are no longer performed, and an appropriate information message is displayed instead.

Result List Display in Tree Format

For identical objects, the result list in tree format now displays identical result list attributes in main nodes and in subnodes.

Effects on Customizing

- You make the settings for the following functions in Customizing for ***Customer Relationship Management*** under ***Interaction Center WebClient -> Agent Inbox -> Define Inbox Profiles***:
 - Inbox search table for business transactions

- Inbox search table for work items
- Maximum number of results
- Time periods
- If you want to adjust the data record of an outbound correspondence item before it is stored in the predefined inbox search table for outbound correspondence, you make the settings in Customizing for **Customer Relationship Management** under **Interaction Center WebClient -> Agent Inbox -> Business Add-Ins -> BAdI: Outbound Correspondence Database Update**.
- The Customizing activity **BAdI: Agent Inbox** has been moved to **Customer Relationship Management -> Interaction Center WebClient -> Agent Inbox -> Business Add-Ins**.

See also

SAP Library on SAP Help Portal at <http://help.sap.com/crm> -> <Choose relevant release> -> **Application Help -> Business Functions for SAP Customer Relationship Management -> Interaction Center -> IC Inbox Extensions 2**

Analytics

Business Function Interactive Reporting

CRM_ANA_UI5: Business Function Interactive Reporting Using UI Development Toolkit for HTML5 (New)

Use

As of SAP Enhancement Package 3 for SAP CRM 7.0 the business function ***Interactive Reporting Using UI Development Toolkit for HTML5*** is available.

The business function **SAP BusinessObjects Integration and CRM Interactive Reporting** (CRM_ANA_BOB) is a prerequisite for using this business function.

You can use this business function to replace the Interactive Reporting UI based on Adobe Flash™ used to display reporting data with an HTML5 UI.

The HTML5 UI provides you with the following improvements:

- Support for accessibility applications (such as the screen reader)
- Additional chart types for displaying reporting data
- Reduced resource consumption and improved browser performance

The following browsers are supported:

- Internet Explorer as of Version 9. For more information, see note 1878639.
- Firefox as of version 17
- Chrome
Note: Your system automatically contains the most recent version.
- Safari as of version 5

SAP recommends always using the most recent browser version.

If you subsequently want to use a browser that is not supported, deactivate this business function so that you can use the Interactive Reporting UI based on Adobe Flash™ again.

Business Function Embedded Interactive and SAP HANA Live Reporting Analytics

CRM_EMBED_IR_ANA_UI: Embedded Interactive and SAP HANA Live Reporting Analytics (New for SP02)

Use

As of SAP enhancement package 3 (SP02) for SAP CRM 7.0, the business function *Embedded Interactive Reporting and SAP HANA Live Reporting Analytics* is available.

The business function **Interactive Reporting Using UI Development Toolkit for HTML5** (CRM_ANA_UI5) is a prerequisite for using this business function.

The business function *Embedded Interactive Reporting and SAP HANA Live Reporting Analytics* (CRM_EMBED_IR_ANA_UI) provides the following features:

- Publish interactive report to the overview page, home page, work center, and shared report page
- Publish SAP HANA Live reports to the home page and work center

Effects on Customizing

You make the Customizing settings for embedding interactive reports in Customizing for *Customer Relationship Management* under **CRM Analytics -> Interactive Reporting -> Publish Interactive Reports:**

- **Define UI Component and Context Nodes**
- **Define Interactive Report Profile**
- **BAdI: Metadata Check**

You make the Customizing settings for embedding SAP HANA Live reports in Customizing for *Customer Relationship Management* under **CRM Analytics -> Interactive Reporting -> Publish SAP HANA Live Reports:**

- **Define UI Component and Context Nodes**
- **Define SAP HANA Live Report Profile**

See also

- SAP Library for SAP CRM on SAP Help Portal at <http://help.sap.com/crm> -> **SAP Enhancement Package 3 for SAP CRM 7.0 -> Application Help -> Business Functions for SAP Customer Relationship Management -> Analytics -> Embedded Interactive Reporting and SAP HANA Live Reporting Analytics.**
- SAP Note 1911457

Business Function SAP CRM HANA Live Reporting

CRM_ANA_OR_ODATA: SAP CRM HANA Live Reporting (New for SP02)

Use

As of SAP enhancement package 3 (SP02) for SAP CRM 7.0, the business function **SAP CRM HANA Live Reporting** is available.

This business function makes SAP HANA Live Reporting available to you. You can use this to perform real-time analyses, which access SAP HANA Live **query views** using OData services.

OData services can access the SAP HANA Live query views delivered by SAP or your own query views.

This business function includes the following features:

- Create reports
When creating a report, you can assign a SAP HANA Live query, and select a layout and a chart type.
- Find reports using the report type **SAP HANA Live Report**
- Execute reports
Prerequisite:
 - The user is authorized to access the corresponding SAP HANA Live query views in the SAP HANA database.
 - The user has an identical user ID for both SAP CRM and for the SAP HANA database.
 - The WebClient UI is accessed using the SAP Web Dispatcher.
For more information about the SAP Web dispatcher, see SAP Library for **SAP NetWeaver** at http://help.sap.com/nw_platform -> **Application Help** -> **Function-Oriented View** -> **Application Server** -> **Application Server Infrastructure** -> **Components of SAP NetWeaver Application Server** -> **SAP Web Dispatcher**.

Effects on System Administration

Register the SAP NetWeaver Gateway Service CRM_ANA_ODATA_REPORTS in the affected SAP NetWeaver Gateway hub systems. Use the transaction **SEGW** to do so.

During this service registration you must assign system aliases. You enter these system aliases (for example the system alias LOCAL) in the Customizing activity **Manage SAP System Aliases**.

For more information about the SAP NetWeaver Gateway Service, see SAP Library for **SAP NetWeaver** at <http://help.sap.com/nwgateway> -> **Configuration Guide** -> **SAP NetWeaver Gateway Configuration Guide** -> **OData Channel Configuration** -> **Settings for OData Channel Service Development on the Hub System** -> **Assigning SAP System Alias to OData Service**.

Effects on Customizing

You make the Customizing settings for this function in Customizing for **Customer Relationship Management** under **Set Up SAP HANA Live Queries**.

See also

For more information about SAP HANA Live query views, see SAP Library for **SAP HANA Live for Business Suite** at <http://help.sap.com/hba> -> **Application Help** -> **SAP HANA Live for SAP CRM** -> **Query Views for SAP CRM**.

SAP Note 1915516: Guided activity to make SAP HANA Live Query Views available in SAP CRM for SAP HANA Live Reporting.

Country-Specific Functions

Business Function Golden Tax China

CRM_LOC_CN_1: Golden Tax China (New for SP01)

Use

As of the following releases, the business function ***Golden Tax China*** (CRM_LOC_CN_1) is available:

- SAP enhancement package 3 (SP01) for SAP CRM 7.0
- SAP enhancement package 2 (SP08) for SAP CRM 7.0

You can use this business function to generate VAT invoices that have GT numbers issued by the government-owned Golden Tax System (GTS).

To facilitate these requirements, this business function offers the following features:

- **Creation of Golden Tax Documents from VAT Invoice**
When a VAT invoice is created, the system checks whether it contains multiple tax rates and whether its net amount is greater than the maximum VAT invoice amount specified for that billing type by the tax law. If these conditions are true, the system splits the invoice into Golden Tax (GT) documents so that each document contains items having the same tax rate and its net amount does not exceed the maximum VAT invoice amount.
- **Download of Golden Tax Documents**
From the CRM web portal, you can save the details of selected GT documents to a text file, which can then be sent to GTS.
- **Upload of Golden Tax Numbers**
When GTS sends back a text file with GT numbers, you can update the corresponding GT documents by uploading the file to the CRM system from the web portal.
- **Cancellation of Golden Tax Documents**
You can cancel a GT document before or after a GT number is issued for it. This can be done either at the invoice level in the CRM system, or on the CRM web portal, or by GTS.

Effects on Customizing

You must make settings for ***Golden Tax China*** in the CRM system in Customizing for ***Customer Relationship Management*** under ***Billing*** -> ***Country-Specific Functions*** -> ***China***.

SAP CRM for Industries: Cross-Industry Functions

Business Function Integration of SAP CC and SAP CI with the Provider Order

CRM_PROVORDERINT_2: Business Function Integration of SAP CC and SAP CI with the Provider Order (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, the business function ***Integration of SAP CC and SAP CI with the Provider Order*** (CRM_PROVORDERINT_2) is available. You can use this business function to set up a complete and integrated end-to-end scenario for Order-to-Cash for prepaid and postpaid services in conjunction with SAP Convergent Invoicing (SAP CI) and SAP Convergent Charging (SAP CC).

The business function provides the following features:

- Enhancements for Sales and Order Management
 - Simplified API layer for batch processing of provider orders or contracts
 - Option of archiving of provider orders, contracts, and master agreements
 - Performance improvements: Option of using templates for provider order creation
 - Option of classifying products, for example to restrict products to be used only in a B2C or/and B2B-context or for revenue distribution contracts
- Partner Agreement Integration with SAP ERP
 - Capabilities for service provider to share parts of the revenue from a contractual agreement with their content provider
 - Replication of partner agreements created in SAP CRM to SAP CI and SAP CC
- Discount Integration with SAP ERP
 - Option of assigning discounts defined in SAP CI to SAP CRM products. The assignments are replicated to SAP CI with the corresponding contract. SAP CI can then observe the discounts during billing and invoicing
- Provider Sales and Order Management (PROV-SALES) business role
 - Web UI application for provider order and contract management used to maintain master agreements, capture provider orders and maintain provider contracts in the back office
- B2B Master Agreement
 - Option of defining and managing individual sales agreements (specific validity period, authorized persons, master agreement specific products, individual prices and discounts), for example within a B2B scenario
 - Provider order creation can take place with reference to a master agreement. Sales agreements in the master agreement are used as a template for these provider contracts
- Mass Run
 - Option of bulk ordering with reference to master agreements (creation of provider orders or contracts during a mass process)
 - Option to make mass changes to provider contracts
 - Option to manage mass runs (creation of provider orders or contracts with reference to master agreements, change of mass runs, monitoring, error handling)

- Option of using data upload (to spreadsheet application) for mass runs
- Framework for customers to create their own mass run processes with their own fields
- Batch processing of mass runs run according to scheduling options (ad hoc, as a planned job)
- Counter Sharing
 - Creation of sharing contracts to specify services that apply to all individual contracts assigned to a sharing contract and that are to be used by all contract partners
 - Creation of provider contracts with reference to sharing contracts
- SAP Jam Integration of provider order, provider contract, and master agreement
- Data Integrity Manager (DIMa) for provider contract distribution
- Provider contract changes with concrete time stamp
- Price update for provider contracts
- Product master data enhancements

For more information, see the following release notes:

- **CRM_PROVORDERINT_2: Customizing Repl. of Tech. Resource Types (new)**
- **CRM_PROVORDERINT_2: Back Office Role PROV-SALES (new)**
- **CRM_PROVORDERINT_2: Generic Customizing of SAP for Telecommunications**
- **CRM_PROVORDERINT_2: Product Purpose (new)**
- **CRM_PROVORDERINT_2: Master Agreement (new)**
- **CRM_PROVORDERINT_2: Discounts (new)**
- **CRM_PROVORDERINT_2: Mass Runs (new)**
- **CRM_PROVORDERINT_2: Partner Agreement with integration to SAP ERP (new)**
- **CRM_PROVORDERINT_2: Counter Sharing (new)**
- **CRM_PROVORDERINT_2: Provider Order and Contract API (new)**
- **CRM_PROVORDERINT_2: Provider Order Template (new)**
- **CRM_PROVORDERINT_2: Provider Order and Contract Archiving (new)**
- **CRM_PROVORDERINT_2: Update Pricing of Contracts (new)**
- **CRM_PROVORDERINT_2: DIMa Object for Provider Contract (new)**
- **CRM_PROVORDERINT_2: SAP Jam Integration for Provider Contract (new)**

See also

SAP Library for SAP CRM on SAP Help Portal at <http://help.sap.com/crm> -> **SAP CRM 7.0 Enhancement Package 3 -> Application Help -> Business Functions (SAP Enhancement Package 3 for SAP CRM 7.0) -> Business Functions for SAP Customer Relationship Management -> Integration of SAP CC and SAP CI with the Provider Order.**

CRM_PROVORDERINT_2: Customizing Replication of Technical Resource Types (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **Integration of SAP CC and SAP CI with the Provider Order** (CRM_PROVORDERINT_2), you can upload the Customizing settings for technical resource types from SAP CRM to SAP ERP.

You can use the report CRM_ISX_UPLOAD_TECH_RES_ERP to upload the technical resource types and their descriptions defined in the SAP CRM database tables CRMC_TC_TR_TYPE and CRMC_TC_TR_TYPET to SAP ERP to the database tables TFK_VT_TRT and TFK_VT_TRTT.

Choose the following path in Customizing:

- *Customer Relationship Management -> Cross Industry Functions -> Provider Contract Management -> Transactions -> Technical Resources -> Define Assignment Schema for Technical Resources*
- *Financial Accounting (New) -> Contract Accounts Receivable and Payable -> Basic Functions -> Provider Contract -> Define the Type of ID*

This report is used to synchronize the Customizing settings between SAP CRM and SAP ERP. The system only inserts technical resource types that do not exist in SAP ERP.

Effects on System Administration

In the SAP ERP system, one of the following business functions must be activated:

- FICAX_CI_5
- FICAX_INV_2
- FICAX_INV_PP_3
- TEL_CA_5
- TEL_INV_2
- TEL_INV_PP_3

CRM_PROVORDERINT_2: Back Office Role PROV-SALES (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **Integration of SAP CC and SAP CI with the Provider Order** (CRM_PROVORDERINT_2), the *Provider Sales and Order Management* (PROV-SALES) business role is available. You can use this role as a template to create your own user roles in the system.

Effects on Existing Data

The *Provider Sales and Order Management* (PROV-SALES) business role is a business role based on the existing business role Sales Professional (SALESPRO). In addition to the standard functions for a sales professional, the new role includes functions for provider contract management. You can manage provider orders or provider contracts in back-office mode with reference to master agreements. You can use the master agreement to define a contractual agreement with constituent parts for future single contracts. This defines which legal unit is allowed to order which type of products for which price, the destination to which the invoice is sent, and the conditions that have to be met to obtain a special type of discount. In addition to capturing provider orders with reference to master agreements, you can also manage and maintain master agreements.

The role also covers requirements in the area of partner settlement. For example, a customer has used or bought a service or a product from a provider company. The provider company must then forward a certain amount of money to the corresponding partner(s) or third parties. Creating and selling products for such partner agreements can be handled within the *Provider Sales and Order Management* (PROV-SALES) business role.

Effects on System Administration

You must activate the business function **Integration of SAP CC and SAP CI with the Provider Order** (CRM_PROVORDERINT_2) in the SAP CRM System.

The subscription for product replication must be assigned to the ERP site in the middleware administration console.

Effects on Customizing

You must set the indicator for the Solution Configurator tool for the provider order transaction type. You make the relevant Customizing settings in Customizing for **Customer Relationship Management** under **Transactions -> Basic Settings -> Define Transaction Types**.

You must set the indicator for the Solution Configurator tool for the provider order transaction category. You make the relevant Customizing settings in Customizing for **Customer Relationship Management** under **Transactions -> Basic Settings -> Products -> Define Item Categories**.

See also

For more information, see Customizing for Customer Relationship Management under **Customer Relationship Management -> UI Framework -> Business Roles -> Define Business Role**.

CRM_PROVORDERINT_2; CRM_FCA_2: Generic Customizing of SAP for Telecommunications (New)

Use

Since Provider Order and Contract Management is available not only for SAP for Telecommunications, but also for other industries, with SAP enhancement package 3 for SAP CRM 7.0, business function ***Integration of SAP CC and SAP CI with the Provider Order*** (CRM_PROVORDERINT_2), the Customizing activities for the following functions have been revised and provided in a generic Customizing structure:

- Provider Order and Contract Management
- Bill Display (Bills)
- Dispute Management and Adjustment Requests

This generic Customizing structure is now available under *Customer Relationship Management -> Cross-Industry Functions*.

The Customizing structure for SAP for Telecommunications for older releases is available under *Customer Relationship Management -> Industry-Specific Solutions -> Telecommunications*.

Effects on System Administration

You must activate the business function ***Integration of SAP CC and SAP CI with the Provider Order*** (CRM_PROVORDERINT_2) in the CRM System.

CRM_PROVORDERINT_2: Product Purpose (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **Integration of SAP CC and SAP CI with the Provider Order** (CRM_PROVORDERINT_2), you can classify products for different purposes by creating different product categories. The product purpose supports a different business use of products in provider orders and master agreements to avoid misuse of products for the different possible purposes.

The following product purposes are supported:

- **Standard product**
The standard product is used in provider orders or contracts. Products are also used as standard products if no definition is made for a certain product category.
Standard products cannot be used in revenue distribution contracts or master agreements to redefine products so they are suitable for customer-specific requirements.
- **Master agreement product**
A master agreement product can only be used in master agreements to define customer-specific items that for example store customer-specific prices. These master agreement items are then used as a reference for provider orders.
You cannot use master agreement products directly in provider orders without referring to a master agreement item that uses the same product
- **Revenue distribution product**
A revenue distribution product defines the rules for distribution of revenue for third-party companies or partners if customers buy or consume services that these partners are involved in providing. Revenue distribution products can only be used in revenue distribution orders or contracts.
- **Sharing product**
A sharing product is generally a fee for the usage of counter sharing over several provider orders with reference to a single master agreement.
A sharing product can only be used in sharing orders or contracts.

Effects on System Administration

You must activate the business function **Integration of SAP CC and SAP CI with the Provider Order** (CRM_PROVORDERINT_2) in the CRM System.

See also

You make the Customizing settings for this function in Customizing for **Customer Relationship Management** under **Cross Industry Functions -> Master Data -> Products -> Define Settings for Product Categories**.

Document purposes are set for provider transaction types. You make the Customizing settings for this function in Customizing for **Customer Relationship Management** under **Cross-Industry Functions -> Provider Order and Contract Management -> Transactions -> Define Settings for Transaction Types**.

CRM_PROVORDERINT_2: Master Agreement (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **Integration of SAP CC and SAP CI with the Provider Order** (CRM_PROVORDERINT_2), the master agreement is available. The master agreement is a contract between a provider and another company, which you use to manage B2B scenarios, and in which you can define the following individual sales agreements for a specific validity period:

- Authorized persons
- Individual products (define specific product attributes)
- Individual prices and discounts

Sales agreements in the master agreement are used as a template for sales contracts (provider contracts), which are created with reference to these sales agreements. If an authorized company (business partner) references an existing master agreement in their order, individual products and agreements can be released from the master agreement (release order). The agreed prices and products are automatically transferred to the subsequent document (provider contract).

You can use master agreements to ensure that business partners have a long-term relationship with your company as a result of individual prices and customer-specific products. The system landscape in Provider Order and Contract Management, which consists of SAP Customer Relationship Management (SAP CRM), SAP Enterprise Resource Planning (SAP ERP) and SAP Convergent Charging (SAP CC), means that it is necessary to distribute the master agreements.

Basic Structure of Master Agreement

The master agreement is an object that is found between the product and the provider contract. You can modify product data and use it as a template when you create the provider contract. You edit the data required to create the contract in SAP CRM and the data you require for invoicing in SAP ERP. When the product characteristics are defined in the master agreement, the following process steps are distinguished:

- Modeling
During product modeling, you can formally define parameters, such as characteristics and values and by doing so create a product model. All attribute characteristics and value ranges are assigned to a product in this product model. The modeling step is performed without a customer reference beyond the master agreement.
- Configuration
Configuring a product means you can select individual characteristic values that are assigned to the associated product model. This step is typically performed according to the customer requirements. This means that you assign a configurable product to an item in the master agreement and configure it according to the customer requirements. These characteristic values include the following:
 - Redefine interval tables
 - Redefine configuration
 - Redefine mapping table
 - Redefine price agreements
 - Redefine parameters (CC parameters)
 - Redefine product texts
 - Save

By saving values in the master agreement, you define the individual features of the product. You can assign a custom ID to this customer-specific product in the master agreement. The master

agreement as therefore also referred to as a product catalog for a customer.

Effects on System Administration

You must activate the business function ***Integration of SAP CC and SAP CI with the Provider Order*** (CRM_PROVORDERINT_2) in the CRM System.

You must activate one of the following business functions in the ERP System:

- ***Billing in Contract Accounting 3*** (FICAX_INV_PP_3)
- ***Billing in Contract Accounts Receivable and Payable*** (ISU_INV_PP_3)
- ***Convergent Invoicing for Telco's*** (TEL_INV_PP_3)

The subscription for product replication and all business transactions must be assigned to the ERP site in the middleware administration console.

Effects on Customizing

You make the Customizing settings for this function in Customizing for ***Customer Relationship Management*** under ***Cross Industry Functions -> Provider Order and Contract Management -> Master Agreement***.

CRM_PROVORDERINT_2: Discounts (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function ***Integration of SAP CC and SAP CI with the Provider Order*** (CRM_PROVORDERINT_2), you can assign discounts, which are defined in SAP Convergent Invoicing, to SAP CRM products. As a result of this assignment, the discounts are transferred to provider orders and the corresponding contracts. The assignments are replicated to SAP Convergent Invoicing with the contract. The discounts are then observed during the billing and invoicing steps for this contract in SAP Convergent Invoicing.

Effects on System Administration

You must activate the business function ***Integration of SAP CC and SAP CI with the Provider Order*** (CRM_PROVORDERINT_2) in the CRM System.

Effects on Customizing

You make the Customizing settings for this function in Customizing for ***Customer Relationship Management*** under ***Cross-Industry Functions -> Provider Order and Contract Management -> Transactions -> Billing Discounts -> Display Billing Discounts***.

CRM_PROVORDERINT_2: Mass Runs (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **Integration of SAP CC and SAP CI with the Provider Order** (CRM_PROVORDERINT_2), mass runs for provider orders and provider contracts are available. Mass runs provide two categories:

- Category A: Create order or contract from master agreement.
- Category B: Change provider contract using the Business Transactions Maintenance Framework (BTMF).

With mass runs, you can:

- Plan the creation or processing of a preselected number of provider orders and contracts.
- Ensure a high-performance execution.
- Track the progress and support monitoring of the results and further processing of new or changed entities.

Mass runs consist of:

- Headers
Mass run headers contain generic data for the mass creation.
- Elements
Maintain contract-specific data with the elements. Every element represents a specific contract to be created or to be processed and has its own execution status. A mass run can consist of two or more elements.

The following functionalities are also available:

- Scheduled processing of mass runs
You can schedule a mass run using the BTMF report to be executed at a certain point in time.
- Mass run reprocessing
Once you have processed a mass run, you can reprocess elements that have the status *Processed with Errors*.
 - Reprocessing of elements
The input fields of the mass run element are changeable and invalid values can be corrected.
 - Manual processing of elements
You can change the status of elements from *Processed with Errors* to *Processed Manually*.
 - Creation of follow-up mass run
You can copy the elements that contain errors in a mass run with the status *Processed with Errors* into a new mass run.
- Data upload to mass run
During the mass run process, you can add elements to the mass run object by uploading a file

Extensibility of mass runs

Since mass runs for contract creation and maintenance depend on contract Customizing and product models, they have a basic standard setup. You must specify mass run types using the following techniques for the processes required:

- UI Configuration
UI configurations for the views used in mass run maintenance use the mass run category and mass run type as a key. Therefore, each mass run type can have a separate UI configuration. You can use these configurations to either add new fields created to the UI or

to hide unwanted fields for the corresponding mass run type. Fields in form views can also be defined as read-only or as mandatory fields, which is not possible in table views.

- **Application Enhancement Tool**
The Application Enhancement Tool (AET) allows the technical enhancement of the mass run objects' header element for the category *Mass Creation* and element for the category *Mass Change*. You can make extensions in the dedicated AET UI or add fields directly on the mass run UI and maintain or create new UI configurations to display them.
- **Handler Implementation Class**
Handler classes are intended to execute customer-specific processing steps during UI maintenance or execution of mass runs. For this purpose, the relevant methods of the customized ABAP handler classes are triggered at the relevant point of time.

Effects on System Administration

You must activate the business function ***Integration of SAP CC and SAP CI with the Provider Order*** (CRM_PROVORDERINT_2) in the SAP CRM System.

Effects on Customizing

You make the Customizing settings for this function in Customizing for ***Customer Relationship Management*** under ***Cross-Industry Functions -> Provider Order and Contract Management -> Mass Runs***

-> Define Number Range for Mass Runs

Since mass run IDs are taken from an internal number range interval, you must set up such an interval to be able to create mass runs.

-> Define Settings for Mass Runs

You use this activity to define mass run types. Mass run types define the following characteristics of a mass run:

- **Mass run category** - define whether new contracts are created or existing contracts are changed
- **Process** - define the execution process for changed contracts
- **Event handler implementation class** - perform additional checks, enrich API calls or post-process contracts
- **Execution profile** - define the number of tasks that process the execution in parallel and the number of elements in a processing block
- **Spreadsheet upload settings** - define the field mapping when uploading element data from a spreadsheet
- **Field settings** - Define default values or switch fields to read-only
 - Default values can be defined for header and element fields. They are defined when a new mass run header is created or when elements are added to the mass run. The values are defined independently of whether they are displayed on the Web UI.
 - Read-only fields cannot be changed on the Web UI by the IC agent. The fields are either defined by the default value or by the event handler implementation class.

CRM_PROVORDERINT_2: Partner Agreement with Integration to SAP ERP (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **Integration of SAP CC and SAP CI with the Provider Order** (CRM_PROVORDERINT_2), the partner agreement is available.

A service provider can use the partner agreement to share parts of the revenue of a contractual agreement with their content provider.

The partner agreement includes conditions for the share of revenues, such as the service or the revenue split. From an end-to-end perspective, the partner agreement is a common requirement to ensure that one solution supports the entire revenue and cost chain (revenue, partner settlement, royalty management, third-party sponsorship, donations, and so on).

The partner agreement is created in SAP CRM and replicated to SAP Convergent Invoicing (SAP CI) and SAP Convergent Charging (SAP CC).

To use the partner agreement in SAP CRM, two transaction types are available:

- PRPA
Transaction type to create the partner agreement.
- PRPO
Transaction type to create the partner agreement order.

In SAP CRM, products can be marked as partner products. Those can then be used in partner agreements.

Partner Settlement Rule

For processing of partner agreements, SAP CI needs to have information about how to process billable items. For this purpose, partner agreements in SAP CI have the mandatory *Partner Settlement Rule* field.

By default, this field is filled during mapping of the activation step in the Order Distribution Infrastructure (ODI). The default value is the configuration value from the product model (PME). Create a characteristic with naming convention SAP_PARTNER_RULE and ensure that the correct values are assigned to the order.

Using the PME-tool to define the value of the partner settlement rule allows:

- Definition of a fixed value valid for multiple products that is filled by default.
- Definition of rules used for each product.
- Definition of a list of valid partner rules that are offered for selection in the order.
- Derivation of the value of the partner settlement rules based on other selections made during product configuration.

Classes within the PME tool allow common definitions. The same logic applies for multiple partner products.

Effects on System Administration

If you want to use this functionality, activate business function **Integration of SAP CC and SAP CI with the Provider Order** (CRM_PROVORDERINT_2).

Effects on Customizing

SAP recommends creating a new product category as a rate plan, for example RP_PARTNER. Assign the *Revenue Sharing Type* to this new product category.

You make the Customizing settings for this function in Customizing for **Customer Relationship Management** under **Cross-Industry Functions -> Master Data -> Products -> Define**

Settings for Product Categories.

When you have created a new category, assign the product roles to the category. You make the settings for this function in Customizing for ***Customer Relationship Management*** under ***Cross-Industry Functions -> Master Data -> Products -> Settings for Packages -> Assign Product Roles to Categories.***

Assign the document purpose *Revenue Sharing Order* to the new transaction types. You make the settings for this function in Customizing for ***Customer Relationship Management*** under ***Cross-Industry Functions -> Provider Order and Contract Management -> Transactions -> Define Settings for Transaction Types.***

Assign a method schema to a sales organization and a transaction type. This controls which item proposal or product proposal types are determined for a particular sales transaction in a particular sales organization. You make the settings for this function in Customizing for ***Customer Relationship Management*** under ***Transactions -> Settings for Sales Transactions -> Product Proposals in Quotations and Orders -> Method Schemas for Product Proposals -> Assign Method Schema to Transaction Types.***

Maintain the settings for document distribution. You make the settings for this function in Customizing for ***Customer Relationship Management*** under ***Cross-Industry Functions -> Provider Order and Contract Management -> Transactions -> Document Distribution -> Define Settings for Document Distribution.*** Enter the new transaction type *PRPA* and assign your schema to it.

CRM_PROVORDERINT_2: Counter Sharing (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **Integration of SAP CC and SAP CI with the Provider Order** (CRM_PROVORDERINT_2), you can use the counter sharing functionality. Using counter sharing means that you can specify services that apply to all individual contracts assigned to a sharing contract and that can be used by all contract partners.

Note

In SAP Convergent Charging (SAP CC), counter sharing is only possible when all provider contracts have the same subscriber account. This means that in SAP CRM and SAP ERP, all related provider contracts must have the same contract partner (payer), but can have different business partners as service recipients.

It is possible to provide sharing for different products as long as the products have the correct definition for counter sharing. In SAP ERP, you must create invoice agreements for each single service recipient if the service recipient also makes a payment for their own consumption.

Create products with shared counters

To create shared counters, the product of the shared contract and the product of the provider contract must have counters with the same ID and namespace in the charge plan mapping.

Create a sharing contract

The sharing contract is created like a provider contract using a special transaction type. Only sharing products can be used for the sharing contract.

Counter sharing can be used with or without relation to a master agreement.

Master Agreements and Sharing Contracts

To create shared counters, the product of the shared contract and the product of the provider contract must have counters with the same ID and namespace in the charge plan mapping. The sharing contract must be created at item level of the master agreement. You can do this in the assignment block *Sharing Objects* by choosing *New*.

Scenario without reference to master agreement

You can use this scenario if persons who are not employees of a company (for example family members) want to share the same counters within their provider contracts.

Create provider order with reference to sharing contract

To create a standard provider order, enter the number of the corresponding sharing contracts in the assignment block *Provider-Specific Data* in the field *Sharing Contract*.

Counter Sharing Simulation

To display counter sharing in products, version maintenance in Cross Catalog Mapping (CCM) version maintenance provides a counter-sharing simulation dialog box in which the following counters are displayed:

- Counters in the currently maintained product, current version
- Counters in the currently maintained product, current version, that are shared with other counters in this product
- Counters that exist in a certain version-compared product (shown only after entering a product and a CCM-version to be compared)
- Counters that are shared between current product, current version, and the compared product, selected version

Effects on Existing Data

As a prerequisite, two products are defined: One product contains the definition of the sharing rate plan, the other product contains the definition of the rate plan product (technically both

products are of the rate plan transaction type).

The counters to be shared must be defined in CCM for both products. In SAP CC, these counters are defined as counters that can be shared between the following contracts: sharing contract and linked contract.

The master agreement contains the rate plan products. The shared contract product is not part of the master agreement. The provider contracts that are created with relation to a master agreement item contain the rate plan product. This provider contract represents one specific line.

If counter sharing is to be performed for provider contracts, you must create a sharing contract with the correct sharing product. You must assign the sharing contract to a master agreement item.

Effects on Customizing

SAP recommends creating a new product category, for example RP_SHARING (rate plan sharing). Assign the sharing order type to the new product category in Customizing.

You make the Customizing settings for this function in Customizing for **Customer Relationship Management** under **Cross-Industry Functions -> Master Data -> Products -> Define Settings for Product Categories**.

After creating a new category, you must assign the product roles (rate plan) to the category.

You make the Customizing settings for this function in Customizing for **Customer Relationship Management** under **Cross-Industry Functions -> Master Data -> Products -> Settings for Packages -> Assign Product Roles to Categories**.

Document purposes are defined for provider transaction types. You make the Customizing settings for this function in Customizing for **Customer Relationship Management** under **Cross-Industry Functions -> Provider Order and Contract Management -> Transactions -> Define Settings for Transaction Types**.

Business Transaction Types

To use the sharing contract in SAP CRM, two transaction types are available:

- PRCO
The transaction type PRCO is used to create the shared order.
- PRCC
The transaction type PRCC is used to create the shared contract.

You make the Customizing settings for this function in Customizing for **Customer Relationship Management** under **Cross-Industry Functions -> Provider Order and Contract Management -> Transactions -> Define Settings for Transaction Types**.

Method Schema

You assign a method schema to a sales organization and a transaction type. This controls which item proposal or product proposal types are determined for a particular sales transaction in a particular sales organization.

You make the Customizing settings for this function in Customizing for **Customer Relationship Management** under **Transactions -> Settings for Sales Transactions -> Product Proposals in Quotations and Orders -> Method Schemas for Product Proposals -> Assign Method Schema to Transaction Types**.

CRM_PROVORDERINT_2: Provider Order and Contract API (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **Integration of SAP CC and SAP CI with the Provider Order** (CRM_PROVORDERINT_2), the Application Programming Interface (API) provides an additional option for maintaining data for provider orders and contracts in addition to the existing web-based WebClient UIs (interaction center, back office).

The main use cases are:

- Order capturing in the preceding system, for example external CRM, mobile client, SAP Web Channel
- Migration
- Automated contract changes (for example extensions)
- Mass run

This API offers operations, for example methods that have a complex interface and only allow a single call to perform their task. For example, the creation of a sales order requires all item details, including the correct configuration data or technical resources.

You can execute the following actions:

- You can create the provider order and subsequently edit it on the UI. This function is also available in the IC WebClient and in the back office.
- You can create the provider order and contract in a single step. This function is also available in the IC WebClient and in the back office.
- You can create a provider contract without a referenced order. You can create several contracts in one step.
- You can change the contracts.

To create or change provider orders and contracts, the following methods and RFC-function modules are provided:

- Create a provider order and contract with a referenced order
 - Method: CL_CRM_ISX_PROV_ORDER_API_PRXY=>ORDER_CREATE
 - RFC function module: CRM_ISX_BT_X_API_ORDER_CREATE
- Create a provider contract without a referenced order
 - Method: CL_CRM_ISX_PROV_ORDER_API_PRXY=>CONTRACT_CREATE
 - RFC function module: CRM_ISX_BT_X_API_CONT_CREATE
- Change a provider contract
 - Method: CL_CRM_ISX_PROV_ORDER_API_PRXY=>CONTRACT_CHANGE
 - RFC function module: CRM_ISX_BT_X_API_CONT_CHANGE

The import structure of the API contains the order data to be created or changed and a set of flags, controlling how the process is executed or whether a commit is to be performed.

The export structure of the API returns information about the objects created or changed, for example document numbers and messages that occurred during processing, such as error messages.

Note

For a detailed description of parameters to be used, see the documentation for function modules.

Prerequisites

Before you can create a provider sales order or a provider contract, you must maintain the following data in the system:

- Partner master data to be used
- Sales organization
Create the sales organization with all relevant components, such as sales office, sales group, distribution channel, and division. The partner can have a specific default sales organization here.
- Process transaction type
You can only create a provider order or contract when you have defined a business transaction type
- Product
Prices have to be maintained at regular intervals for the corresponding sales organization. In Customizing, you can define the way in which the price is to be determined. For example, the contract start can be used as the basis for price determination. You make the Customizing settings for this function in Customizing for **Customer Relationship Management** under **Basic Functions -> Pricing -> Define Settings for Pricing -> Create Condition Types**.
Select a specific condition type, for example monthly fee, and select the required entry from the *Access Date* field. To obtain the prices that are relevant to the activation date of the contract, select the entry PRVO_ACTIVATION_TIMESTAMP.
- Customizing settings for the technical resource
If the technical resource is used, these Customizing settings must be available
- Change process
You have to setup the Business Transactions Maintenance Framework (BTMF) as required. You have to define and implement the relevant BTMF process. A process that can be used by the API has to ensure that all required input data is provided by the API interface. A generic collection of name value pairs is available for this. This data is accessible from within the process using a global data container (BTMF container). Most of the processes shipped in the standard SAP system do not use this container to obtain process data, but rely on obtaining this data from the UI. An exception is the 'CANCEL' process, which extracts process data (such as the reason or requested date) for cancelling a running provider contract from the BTMF container.

Limitations

The following limitations have to be considered when using the provider API:

- Multi-level configuration is not supported. This means that a configurable product must not contain another configurable product defined in the same product model.
- Attribute item usage is determined from the attribute product role available in the sales data for the product, as follows:
 - If the parent item is *Sales Package*, the corresponding usage is *Sales Component* ('16').
 - If the parent item is *Rate Plan*, the parent object is configurable and the item is a rate plan, the usage is *Configuration* ('01'); Otherwise, the usage is *Dependent Component* ('18').
 - If there is no parent object, the usage is initial.
 - When using Configuration, it is assumed that only rate plans are used and that no rate plan is as a dependent component.
 - The SOLD_TO partner function is available at header level only (corresponds to UI) and cannot be overwritten at item level separately.

Enhancement spot: CRM_ISX_BT_X_API

The enhancement spot CRM_ISX_BT_X_API is created to give the customer the option of defining the behavior of fields not covered by the standard API structure. For more information, see the description of the BAdI.

CRM_PROVORDERINT_2: Provider Order Template (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **Integration of SAP CC and SAP CI with the Provider Order** (CRM_PROVORDERINT_2), you can use a template logic to improve the performance of provider order creation.

Using templates means that time-consuming determination logic is only executed once upfront and the results are used as a copy template for consumers when signing a new contract. In this case, the data of the provider order item is taken from a template that is stored in a database table.

This is useful only for scenarios in which the customer and their personal data do not impact the terms and conditions of the contract.

You can use the template in the provider backend UI and in the Provider IC WebClient UI.

Note

You must create a template for each main item in the provider order document. If no template exists, the item is created using the SAP CRM standard logic.

Note

When you create a provider order document using the template logic, you must maintain the organizational data before you enter the product.

Effects on Customizing

You make the Customizing settings for this function in Customizing for **Customer Relationship Management** under **Cross-Industry Functions -> Provider Order and Contract Management -> Transactions -> Define Settings for Transaction Types**. Select the *Template* checkbox for the transaction types to be used for the template logic.

The sold-to party in the template is the reference business partner for consumers. You make the relevant Customizing settings in Customizing for **Customer Relationship Management** under **Master Data -> Business Partner -> Basic Settings -> Maintain Reference Business Partner for Consumers**.

CRM_PROVORDERINT_2: Provider Order and Contract Archiving (New)

As of SAP enhancement package 3 for SAP CRM 7.0, business function ***Integration of SAP CC and SAP CI with the Provider Order*** (CRM_PROVORDERINT_2), you can archive provider orders and provider contracts.

Archiving of Provider Orders

If a provider order is completed, the associated document can be archived. The archiving object CRM_PRVO is available here. Provider orders are archived independently of provider contracts. This means that the system does not check whether the associated provider contract document or contract time slice can be archived. This applies particularly to provider change orders, where the system does not check whether the preceding time slice in the provider contract document can be archived.

Prerequisites

If you want to archive a provider order, you must make sure the following prerequisites have been met:

- You must set the status *Completed* at header level.
- The residence time (number of days after the last change to the provider document) must have passed.
- It must also be possible to archive subsequent documents (such as tasks or complaints).

You can display provider orders, but you cannot change them. Choose *Archive Search* on the search screen.

Archiving of Provider Contracts

You can archive a contract document if all of its contracts have been finished. The archiving object CRM_PRVC is available here.

Provider contracts are archived independently of provider orders. This means that the system does not check whether the associated provider orders can be archived for all contract time slices.

Prerequisites

If you want to archive a provider contract document, you must make sure the following prerequisites have been met:

- You must select the status *Provider Contracts Finished* at header level.
- The residence time (number of days after the last change to the provider contract document) must have passed.
- It must also be possible to archive subsequent documents (such as tasks or complaints).

You can display provider contracts, but you cannot change them. Choose *Archive Search* on the search screen. In contrast to the standard search for contracts that also returns contract items, you can only search for contract documents in the archive.

More Information

The *Provider Contracts Finished* status is set automatically at header level of the provider contract document if all contracts in this document have been finished. The system deletes locks for future archiving instead of archiving them with the provider contract.

Effects on System Administration

You must activate the business function ***Integration of SAP CC and SAP CI with the Provider Order*** (CRM_PROVORDERINT_2) in the SAP CRM System.

The subscription for product replication must be assigned to the ERP site in the middleware administration console.

CRM_PROVORDERINT_2: Update Pricing of Contracts (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function ***Integration of SAP CC and SAP CI with the Provider Order*** (CRM_PROVORDERINT_2), the update function for pricing at contract level in the UI is available.

Changes to pricing master data may require the existing contract data to be updated accordingly. For this purpose, the update function for pricing is available at contract level in the UI. Using report CRM_PROV_CONTRACT_UPDATE_PRICE, multiple contracts are processed in batch mode. The selection criteria are the same as those in the back office contract search. Therefore you must use the same selection options as those used in the back office.

CRM_PROVORDERINT_2: DIMa Object for Provider Contract (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **Integration of SAP CC and SAP CI with the Provider Order** (CRM_PROVORDERINT_2), you can use the Data Integrity Manager (DIMa) to check whether all your provider contracts in SAP CRM are replicated to SAP ERP and SAP CC.

You can use the DIMa object ISX_PRV_CONTR to perform a header comparison.

Note: The system only checks whether the contract exists in the other systems, but does not check whether all other information is identical.

You can use the business partner or the contract ID to select the provider contracts to be compared.

Effects on System Administration

In SAP ERP you can perform the search in parallel execution to improve the performance by adding an entry to table CRMPAROLTP:

- PARNAME = CRM_ISX_CC_PARALLEL_THREADS
- PARNAME2 = ISX_PRV_CONTR
- CONSUMER = CRM
- PARVAL1 = number of parallel threads

CRM_PROVORDERINT_2: SAP Jam Integration for Provider Contract (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **Integration of SAP CC and SAP CI with the Provider Order** (CRM_PROVORDERINT_2), you can use **SAP Jam** for all provider documents like provider orders, provider contracts, and master agreements.

SAP Jam is a social collaboration and decision-making solution that brings together people, processes, information, and applications to enable better problem-solving and decision-making. With SAP Jam, you can use social networking to allow your employees and partners to collaborate on projects, and innovate together.

Two SAP Jam assignment blocks are available on the overview pages of the provider documents:

- *SAP Jam Groups* for creating and maintaining SAP Jam groups and assigning these groups to the provider document.
- *SAP Jam Feeds* for displaying existing SAP Jam feeds of the provider document or creating new ones.

The following features are available:

- *Follow* button to mark a provider document for following and get all SAP Jam feeds that have been created for this document.
- Maintaining SAP Jam groups and inviting new members to the group.
- Assigning a SAP Jam group to a provider document. All members of the Jam group are being informed about this new assignment.
- Posting new feeds for a provider document. All follower of this document are being informed about this post.

The following prerequisites for SAP Jam integration are required:

- To use the SAP Jam integration, you must install a SAP Jam server. For more information, see the SAP Jam Administrator's Guide on the SAP Help Portal under *help.sap.com/sapjam* -> *Administrator Guide*.
- You must activate the business function *Integration of SAP Jam with SAP CRM* (CRM_SWI_1) and technically integrate SAP Jam and SAP CRM.

Add-On: SAP Jam Business Object Notifications for Provider Documents

After saving changes of a provider document, a feed is generated automatically and posted to all followers of this document. All provider documents are supported for business object notifications.

The following prerequisites for SAP Jam business object notifications are required:

- SAP NetWeaver 7.04 SP02 must be installed.
- Add-On *SAP Jam, add-on for enhanced integration for SAP CRM* (CRMSWI01) and SAP Note 1840360 *oData Service for JAM Integration of Provider Documents* are needed.
- Also consider the settings listed in the documentation of business function **SAP CRM BO Change Notification Using SAP NetWeaver Gateway** (CRM_SWI_GW) under *help.sap.com/sapjam* -> SAP Business Suite -> SAP Customer Relationship Management -> SAP Enhancement Package 2 for SAP CRM 7.0 -> Application Help -> English/German -> Business Functions for SAP Customer Relationship Management -> Basic Functions and Performance -> Integration of SAP Jam with SAP CRM -> SAP CRM BO Change Notification Using SAP NetWeaver Gateway.

SAP CRM for Industries: Contract Accounts Receivable and Payable

Business Function FCC and Dispute Management for Contract AR/AP, 1

CRM_FCA_2: Business Function FCC and Dispute Management for Contract AR/AP, 1

Use

As of SAP enhancement package 3 for SAP CRM 7.0, the business function **Financial Customer Care for Contract AR/AP (FI-CA), 1** (CRM_FCA_2) is available. This business function provides the following enhancements in Financial Customer Care (FCC) and Dispute Management:

- **Provider contract**
Provider contract data from the Billing Suite is now directly available in Financial Customer Care. You can display and search for provider contracts from the Billing Suite.
- **Prepaid processing**
In account identification you can search for contracts using the numbers of prepaid accounts.
In addition you can:
 - Display and maintain master data for the prepaid account using the business agreement
 - Display transactions on the prepaid account (itemizations and refills)
 - Refill the prepaid account
 - Refund credit
 - Transfer credit to another prepaid account
 - Transfer a balance to a business agreement
 - Transfer a credit or receivable of a business agreement
 - Display bills and billing detail records for prepaid accounts
- **FCC role**
SAP provides the new role **Financial IC Agent - using Provider Contract (from ERP and CC)** (FCC_PC_ERP), which provides direct access to provider contract data from the Billing Suite.
- **Subapplication**
The system now displays the subapplication for all contract objects in all views of Financial Customer Care (FCC).
If you are using more than one contract object, you can search for particular contracts by entering the ID in combination with the subapplication.

For more information, see the following release notes:

- **CRM_FCA_2: Integration of ERP Provider Contract into Financial Customer Care**
- **CRM_FCA_2: Integration of Prepaid Processing into Financial Customer Care**
- **CRM_FCA_2: Subapplication in Financial Customer Care**
- **CRM_FCA_2: Roles in Financial Customer Care**
- **CRM_FCA_2: Display for Billing Detail Records (Enhanced)**
- **CRM_PROVORDERINT_2; CRM_FCA_2: Generic Customizing of SAP for**

Telecommunications (New)

Effects on System Administration

If you use SAP for Telecommunications, activate the following business functions:

- **Financial Customer Care for Contract AR/AP, 1** (CRM_FCA_2)
- **Telco: Contract Accounts Receivable and Payable 5** (TEL_CA_5)
- **Telco, Convergent Invoicing 2** (TEL_INV_2)
- **Telco, Billing in Contract Accounts Receivable and Payable 3** (TEL_INV_PP_3)

If you use Contract Accounts Receivable and Payable, activate the following business functions:

- **Financial Customer Care for Contract AR/AP, 1** (CRM_FCA_2)
- **Contract Accounts A/R and A/P, 05** (FICAX_CI_5)
- **Enhancements Invoicing, 02** (FICAX_INV_2)
- **Billing in Contract Accounts Receivable and Payable, 02** (FICAX_INV_PP_3)

If you use SAP Utilities, activate the following business functions:

- **Financial Customer Care for Contract AR/AP, 1** (CRM_FCA_2)
- **Utilities, Contract Accounts A/R and A/P 3** (ISU_CA_3)
- **Utilities, Convergent Invoicing 2** (ISU_INV_2)
- **Utilities, Billing in Contract Accounts Receivable and Payable 2** (ISU_INV_PP_3)

If you use SAP Media, activate the following business functions:

- **Financial Customer Care for Contract AR/AP, 1** (CRM_FCA_2)
- **Media, Contract Accounts A/R and A/P 5** (MED_CA_5)
- **Media: Content to Cash 1** (MED_INV_PP_1)

CRM_FCA_2: Integration of Provider Contract from Billing Suite (New)

Use

If you have been using only Financial Customer Care (FCC) in SAP Customer Relationship Management, but not contract management, then contracts are replicated only from your contract management system to the Billing Suite (consisting of SAP Convergent Charging and SAP ERP), but not to Customer Relationship Management. To be able to use contracts in Financial Customer Care, you have to access the data from SAP ERP and SAP Convergent Charging using the Common Object Layer (COL).

As of SAP enhancement package 3 for SAP CRM 7.0, business function **Financial Customer Care for Contract AR/AP (FI-CA), 1** (CRM_FCA_2), provider contract data from the Billing Suite is now available directly in Financial Customer Care.

For information on how to display contract data from your contract management system instead of that of the provider contract from SAP ERP and SAP Convergent Charging, see SAP Note 746475.

Displaying a Provider Contract from the Billing Suite

Agents can display provider contracts from the Billing Suite in the Interaction Center WebClient. The contract header contains general data, such as the term of the contract. One or more contract items, which relate to a product, are assigned to the provider contract. Also the counters assigned to a provider contract are displayed.

Searching for Provider Contracts from the Billing Suite

Agents can search for provider contracts from the Billing Suite in the Interaction Center WebClient. When the agent confirms the contract, the system identifies the account that is assigned to the contract. If a business agreement is uniquely assigned to the provider contract, the system confirms the business agreement automatically. If the provider contract relates to more than one business agreement, the agent first selects a business agreement and then confirms it together with the contract.

The system adds the confirmed master data to the business data context. If the agent calls independent functions, such as the account balance, dunning notices, or bills, then once the contract and business agreement are confirmed, the system automatically displays only the objects found for the contract and business agreement. Searching by objects of the contract is thereby not necessary.

When the agent confirms a contract, the system adds it to the business object node.

Effects on Customizing

To display counter values for provider contracts, you have maintained the following Customizing settings:

- ERP system
In Customizing for Contract Accounts Receivable and Payable you have performed the activities under **Basic Functions -> Provider Contract -> Counter on Provider Contract**.
- CRM system
In Customizing for Customer Relationship Management under **Interaction Center WebClient -> Industry-Specific Functions -> Integration with Contract Accounts Receivable and Payable (FI-CA) -> Define FI-CA Profiles -> Edit FI-CA Profiles** you have entered the required view (of counters) in the settings for your profile on the Provider Contract tab.

CRM_FCA_2: Prepaid in Financial Customer Care (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **Financial Customer Care for Contract AR/AP (FI-CA), 1** (CRM_FCA_2), you can use the following functions for processing your customers' prepaid credit in Financial Customer Care:

Account Identification

With account identification, you can also search for contracts using the number of the prepaid account.

Prepaid Actions

You can use the following functions for prepaid accounts:

- Display and maintain master data for the prepaid account using the business agreement
- Display transactions on the prepaid account (itemizations and refills)
- Refill the prepaid account
This action supports both simple refills of an amount to the prepaid account, as well as the purchase of refill packages. The prerequisite for this is that payment data is entered in the prepaid account for the refill.
- Refund credit
This action supports both complete refunds and partial refunds of prepaid credit to the customer. The prerequisite in this case is that data for processing the outgoing payments is entered in the business agreement.
- Transfer credit to another prepaid account
The agent can transfer credit from one prepaid account to another.
- Transfer a balance to a business agreement
For example, if a prepaid account is to be closed, the agent can transfer the current balance of the prepaid account to the business agreement for offsetting. The action supports the transfer of both credit balances and negative balances.
- Transfer a credit or receivable of a business agreement
For example, if an incoming payment is posted to a business agreement as the result of an unassigned payment on account, the agent can transfer this amount to the prepaid account. Conversely, the agent can transfer a receivable from the business agreement to the prepaid account, and offset it against the available credit.

Bills and Billing Detail Records

You display bills and billing detail records for prepaid accounts in the display transactions for bills or billing detail records. However, you cannot create adjustment requests or dispute cases for these bills or billing detail records.

Effects on Customizing

To use these prepaid functions in Financial Customer Care, you have to make the necessary settings in the ERP system in Customizing for Contract Accounts Receivable and Payable under **Prepaid Processing**.

You define rules for refill amounts in Customizing for Customer Relationship Management under **Interaction Center WebClient -> Industry-Specific Functions -> Integration with Contract Accounts Receivable and Payable (FI-CA) -> Define FI-CA Profiles -> Define Rules for Refills**.

You then enter these rules in your FI-CA-profile. In Customizing for Customer Relationship Management, choose **Interaction Center WebClient -> Industry-Specific Functions -> Integration with Contract Accounts Receivable and Payable (FI-CA) -> Define FI-CA Profiles -> Edit FI-CA Profiles**.

CRM_FCA_2: Subapplication in Financial Customer Care (New)

Use

Some industry components use more than one contract object. In the ERP system the subapplication identifies the primary and secondary contracts in use. The primary contract object of an industry component is always marked by the subapplication value SPACE.

Up to now, the system only displayed the subapplication for contract objects in the account balance. As of SAP enhancement package 3 for SAP CRM 7.0 business function **Financial Customer Care for Contract AR/AP (FI-CA), 1** (CRM_FCA_2), in combination with SAP enhancement package 7 for SAP ERP 6.0, the system now displays the subapplication for all contract objects in all views of Financial Customer Care (FCC).

Example

The industry component Utilities uses the utility contract as the primary contract. In addition, Utilities uses contracts of Sales and Distribution (SD) (subapplication **C**) and the provider contract (subapplication **P**).

Up to now, when you entered a contract ID in a search, the system assumed that the ID referred to the primary contract. Now, you can search for particular contracts by entering the ID in combination with the subapplication.

To display the subapplication on your screens, use the role configuration key FCC_SUBAP in your business role. Using this key, you can display the subapplication for a contract in sample UI configurations or you can, for example, restrict a selection to a specific subapplication.

CRM_FCA_2: New Role for Financial Customer Care (New)

Use

If you have been using only Financial Customer Care (FCC) in SAP Customer Relationship Management, but not contract management, then contracts are replicated only from your contract management system to the Billing Suite (consisting of SAP Convergent Charging and SAP ERP), but not to Customer Relationship Management. To be able to use contracts in Financial Customer Care, you have to access the data from SAP ERP and SAP Convergent Charging using the Common Object Layer (COL).

As of SAP enhancement package 3 for SAP CRM 7.0, business function **Financial Customer Care for Contract AR/AP (FI-CA), 1** (CRM_FCA_2), provider contract data from the Billing Suite is now available directly in Financial Customer Care.

As part of this enhancement, SAP provides the new role **Financial IC Agent - using Provider Contract (from ERP and CC)** (FCC_PC_ERP). Use this role as a template for creating your own business roles.

In addition to the standard FCC functions, this role also contains the actions for prepaid accounts and the account identification for the provider contract from the Billing Suite. Furthermore, thanks to the embedding of the context menu, for example for confirmed objects, you can reset a confirmation or display confirmed objects.

For information on how to display contract data from your contract management system instead of that of the provider contract from SAP ERP and SAP Convergent Charging, see SAP Note 746475.

CRM_FCA_2: Display for Billing Detail Records (Enhanced)

Use

As of SAP CRM 7.0, enhancement package 3, business function ***FCC and Dispute Management for Contract AR/AP, 1*** (CRM_FCA_2), you can use following enhancements in the display of billing detail records:

- You can search for and display billing detail records for prepaid transactions:
A new selection parameter 'Prepaid' is available to search for prepaid BITs in Convergent Invoicing.
It is not possible to create an adjustment request or a dispute for this type of prepaid billing detail record.
- You can use the subapplication to search using a contract number:
The subapplication supports different contract types in Convergent Invoicing. If you enter a contract number to search for billing detail records, you now have to specify the subapplication to which this contract belongs. If you are only using one contract type in the backend, the subapplication is initial and you do not need to enter it as selection parameter. If you search without a contract number, the system ignores the subapplication, even if it is entered as a selection parameter on the UI.

Effects on System Administration

To use this functionality, you must activate the Business Function *FCC & Dispute for Contract AR/AP* (CRM_FCA_2).

If you want to use different business roles to display the different contract types from Convergent Invoicing, you must create a new UI configuration for the view ISX_EDR/SearchEDR for each role and define the subapplication accordingly as selection parameter.

CRM_PROVORDERINT_2; CRM_FCA_2: Generic Customizing of SAP for Telecommunications (New)

Use

Since Provider Order and Contract Management is available not only for SAP for Telecommunications, but also for other industries, with SAP enhancement package 3 for SAP CRM 7.0, business function ***Integration of SAP CC and SAP CI with the Provider Order*** (CRM_PROVORDERINT_2), the Customizing activities for the following functions have been revised and provided in a generic Customizing structure:

- Provider Order and Contract Management
- Bill Display (Bills)
- Dispute Management and Adjustment Requests

This generic Customizing structure is now available under *Customer Relationship Management -> Cross-Industry Functions*.

The Customizing structure for SAP for Telecommunications for older releases is available under *Customer Relationship Management -> Industry-Specific Solutions -> Telecommunications*.

Effects on System Administration

You must activate the business function ***Integration of SAP CC and SAP CI with the Provider Order*** (CRM_PROVORDERINT_2) in the CRM System.

Business Function Business Partner ILM

BUPA_ILM_BF: Business Function Business Partner ILM (New)

Use

The business function, *Business Partner ILM* is available as of SAP Business Suite Foundation 7.47. With this business function, you can control the destruction of business partner data based on settings made in the Information Lifecycle Management (ILM) framework.

Effects on Existing Data

The business partner archiving report BUSOBARCH has been updated with ILM-based options for destroying data.

Effects on System Administration

System administrators can run the transaction BUPA_PRE_EOP to block and unblock business partners. The PFCG role SAP_CA_BP_DP_ADMIN is required to access the report. The retention and blocking periods should be defined in Information Lifecycle Management (ILM).

Effects on Customizing

You make the Customizing settings for this function in Customizing for AP-MD-BP-DP. The following BAdIs exist for this business function:

- BUP_PARTNER_KEYMAP
- BUP_PARTNER_EXLIST
- BUPA_PURPOSE_EXPORT

BUPA_ILM_BF: Clean Up Inconsistencies in Business Purpose Status (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **Business Partner ILM** (BUPA_ILM_BF), the new report **Select Business Partner Lock Information for Sending** is available. You can run this report if you want to clean up inconsistencies in the business purpose status of the business partner. Inconsistent data can arise if an information message about locked or unlocked business partners was stopped, was incorrect, or was not processed correctly in the receiver system for a different reason.

You can start the report on the **SAP Easy Access** screen under **Financial Services** -> **Business Partner** -> **Periodic Tasks**.

Effects on System Administration

In order to be able to start the report on the **SAP Easy Access** screen, you not only have to activate the business function **Business Partner ILM** but also the business function **FSBP CRM Area Menu & IMG** (FSBP_CRM_MENU_IMG_01).

See also

For more information, see the release note **BUPA_ILM_BF: Business Partner ILM (New)** and the release note **FSBP_CRM_MENU_IMG_01: Business Function FSBP CRM Area Menu & IMG**.

Business Function FS Business Partner Cleansing

CA_FSBP_CRM_CLEANSING_01: Business Function FS Business Partner Cleansing (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, the business function **FS Business Partner Cleansing** (CA_FSBP_CRM_CLEANSING_01) is available. With this business function, you can benefit from an FS-BP-specific rule-based data cleansing that merges duplicates in the following data:

- Central business partner data
- FS-BP data
- Marketing permissions (from CRM)
- Sales area data (from CRM)

After the FS-BP data has been cleansed, you can activate a standard Business Add-In implementation to start the report CRM_BUPA_REALIGNMENT that cleanses the remaining data. For more information, see *Effects on Customizing* below.

Effects on Existing Data

On the SAP Easy Access screen under **Financial Services -> SAP Business Partner for Financial Services -> Data Cleansing**, the following transactions are available:

- **Edit Data Cleansing Case**
- **Undo Data Cleansing Case** (reset of data cleansing case status)

Effects on System Administration

In order to be able to display and execute the transactions for data cleansing on the *SAP Easy Access* screen and to be able to display and edit the Customizing activities for data cleansing in the Customizing structure, you not only have to activate the business function **FS Business Partner Cleansing** but also the business function **FSBP CRM Area Menu & IMG** (FSBP_CRM_MENU_IMG_01).

You can control authorizations for data cleansing by copying standard roles in transaction PFCG and adjusting them according to your needs. The following standard roles are available:

- SAP_CA_BP_CLEANS_CREAT_FS
You can use this standard role to create a role for users authorized to create cleansing cases. The following cleansing authorization objects and activities are assigned to this role:
 - **B_CLEANS** with the activities **Create** (01) and **Display** (03)
 - **B_CLEAR** with the activity **Display** (03)
- SAP_CA_BP_CLEANS_EXPERT_FS
You can use this standard role for users authorized to create cleansing cases and to process cleansing cases based on the set of rules. The following cleansing authorization objects and activities are assigned to this role:
 - **B_CLEANS** with the activities **Create** (01), **Change** (02), **Display** (03), **Delete** (06), **Release** (43), and **Reactivate** (91)
 - **B_CLEAR** with the activities **Display** (03), **Delete** (06), and **Execute** (16)

Users without cleansing authorizations must not be assigned any of these roles or authorization objects.

Effects on Customizing

In Customizing for *Customer Relationship Management* under **Financial Services -> SAP**

Business Partner for Financial Services -> Tools -> Data Cleansing, the following Customizing activities are available for data cleansing:

Configure Settings for Data Cleansing (mandatory)

Release (optional)

- **Assign Release Procedure to Release Object**
- **Assign Rule to Release Steps**
- **Assign Release Procedure Workflow to Release Procedure**

Business Add-Ins (BAdIs) for Data Cleansing

- **BAdIs for Set of Rules**
 - **BAdI: Rules for Default Values of Business Partner Status** (mandatory)
 - **BAdI: Rules for Readiness Checks** (mandatory)
 - **BAdI: Rules for Merging of Business Partner Data** (mandatory)
 - **BAdI: Rules for Release-Relevance** (mandatory)
 - **BAdI: Processing of Customer Enhancements** (optional)
- **BAdIs for User Interface** (optional)
 - **BAdI: Filling of Customer-Specific Fields**
- **BAdI: Notification Workflow for Case Creation** (optional)
- **BAdI: Changes to Data Cleansing Cases** (mandatory)

You have to activate the BAdI implementation FSBP_CRM_CLEANSING to automatically start the CRM data cleansing report CRM_BUPA_REALIGNMENT as soon as FS-BP data cleansing has been completed.

See also

For more information about data cleansing for SAP Business Partner for Financial Services, see SAP Library for *SAP Customer Relationship Management* on SAP Help Portal at <http://help.sap.com/>. In SAP Library, choose **SAP CRM for Industries -> Financial Services -> SAP Business Partner for Financial Services -> Functions -> Data Cleansing for SAP Business Partner for Financial Services**.

For more information about the CRM data cleansing, see SAP Library for *SAP Customer Relationship Management* under **Business Partners -> Functions -> Data Cleansing**.

For more information about the standard roles available, see the Security Guide for *Customer Relationship Management* on SAP Help Portal at <http://help.sap.com>.

For more information about the business function **FSBP CRM Area Menu & IMG**, see the release note **FSBP_CRM_MENU_IMG_01: Business Function FSBP CRM Area Menu & IMG**.

Business Function FS Business Partner Reconciliation

CA_FSBP_CRM_RECONCILIATION_01: Business Function FS Business Partner Reconciliation (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, the business function ***FS Business Partner Reconciliation*** (CA_FSBP_CRM_RECONCILIATION_01) is available. With this business function, you can use the new report **Select Info About Business Partner and BP Relationship for Sending** to clean up inconsistencies in the business partner data and in the business partner relationship data. Inconsistent data can arise if an information message about new or changed business partners or about new, changed, or deleted business partner relationships was stopped, was incorrect, or was not processed correctly in the receiver system for a different reason.

You can start the report on the *SAP Easy Access* screen under ***Industries -> Financial Services -> Business Partner -> Periodic Tasks***.

Effects on System Administration

In order to be able to start the report on the *SAP Easy Access* screen, you not only have to activate the business function ***FS Business Partner Reconciliation*** but also the business function ***FSBP CRM Area Menu & IMG*** (FSBP_CRM_MENU_IMG_01).

Business Function FSBP CRM Area Menu & IMG

FSBP_CRM_MENU_IMG_01: Business Function FSBP CRM Area Menu & IMG

Use

As of SAP enhancement package 3 for SAP CRM 7.0, the business function **FSBP CRM Area Menu & IMG** (FSBP_CRM_MENU_IMG_01) is available. With this business function, you can benefit from the following:

- An FS-BP menu, including new functions, on the *SAP Easy Access* screen for *Customer Relationship Management* under **Industries -> Financial Services -> SAP Business Partner for Financial Services**
Note that when you activate this business function, you can find the Leasing menu under **Industries -> Financial Services** too. Previously, the Leasing menu was available directly under **Industries**.
- An extended FS-BP Customizing structure
The extended Customizing structure includes a complete set of the FS-BP-specific Customizing settings, enhanced by additional Customizing activities for new FS-BP functions in CRM.
The extended Customizing structure replaces the previous Customizing structure under **Financial Services -> Account Origination -> SAP Business Partner for Financial Services**.

For more information about the new functions included in the menu and in Customizing, see the following release notes:

- **CA_FSBP_CRM_RECONCILIATION_01: Business Function Reconciliation (New)**
- **BUPA_ILM_BF: Clean-Up of Inconsistencies in the Business Purpose Status (New)**
- **CA_FSBP_CRM_CLEANSING_01: Business Function FS Business Partner Cleansing (New)**
- **FSBP_CRM_MENU_IMG_01: Business Add-Ins for Enterprise Services (FS-BP) (New)**

Effects on Customizing

You can find the new FS-BP Customizing structure in Customizing for *Customer Relationship Management* under **Financial Services -> SAP Business Partner for Financial Services**.

See also

To reflect these changes in SAP Library, the SAP Library structure for *Customer Relationship Management* has also been adjusted. You can now find the documentation for *SAP Business Partner for Financial Services* directly under **SAP CRM for Industries -> Financial Services**. Previously, the documentation for *SAP Business Partner for Financial Services* was available under **SAP CRM for Industries -> Financial Services -> Account Origination**.

FSBP_CRM_MENU_IMG_01: BAdIs for Enterprise Services (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function ***FSBP CRM Area Menu & IMG*** (FSBP_CRM_MENU_IMG_01), new Business Add-Ins for the new enterprise services for **SAP Business Partner for Financial Services (FS-BP)** are available in Customizing. You can find them in Customizing under ***Financial Services -> SAP Business Partner for Financial Services -> Communication Between Logical Systems -> BAdIs for Enterprise Services -> Mapping and Processing of Service Enhancements***.

To reflect these changes in the project Customizing, you have to regenerate the project Customizing.

Effects on Customizing

The following new BAdIs are available:

Mapping of Standard Fields

- **BAdI: Mapping of Grouping Characteristic**
- **BAdI: Mapping of Trading Partner Number**
- **BAdI: Mapping of Balance Sheet Display**
- **BAdI: Mapping of Business Partner Type**
- **BAdI: Mapping of Employee Group**
- **BAdI: Mapping of Personnel Number**
- **BAdI: Mapping of International Location Number**
- **BAdI: Mapping of Type of Delivery Service**
- **BAdI: Mapping of Agreement Status for Tax Compliance**
- **BAdI: Mapping of Reason for Tax Compliance Status**
- **BAdI: Mapping of Tax Compliance Status**
- **BAdI: Mapping of Tax Compliance Type**
- **BAdI: Mapping of Target Group**
- **BAdI: Mapping of URI Category**
- **BAdI: Mapping of Minimum Reserve Requirement of Credit Institute**

Mapping and Processing of Service Enhancements

-> Business Partner Data Cleansing Case

- **BAdI for BusinessPartnerDataCleansingCaseCompletionBulkNotification_Out**

-> Business Partner

- **BAdI for BusinessPartnerBasicDataByElementsQueryResponse_In**
- **BAdI for BusinessPartnerBulkCreateConfirmation_Out**
- **BAdI for BusinessPartnerBulkCreateRequest_In**
- **BAdI for BusinessPartnerBulkInformation_Out**
- **BAdI for BusinessPartnerBulkUpdateConfirmation_Out**
- **BAdI for BusinessPartnerBulkUpdateRequest_In**
- **BAdI for BusinessPartnerCreateRequestConfirmation_In**
- **BAdI for BusinessPartnerPurposeCompletionBulkInformation_Out**

- BAdI for BusinessPartnerPurposeResetBulkInformation_Out
- BAdI for BusinessPartnerRetrievalByIdentifyingElementsQueryResponse_In
- BAdI for BusinessPartnerUpdateRequestConfirmation_In

-> *Business Partner Relationship*

- BAdI for BusinessPartnerRelationshipBasicDataByElementsQueryResponse_In
- BAdI for BusinessPartnerRelationshipBulkCancelConfirmation_Out
- BAdI for BusinessPartnerRelationshipBulkCancelRequest_In
- BAdI for BusinessPartnerRelationshipBulkCreateConfirmation_Out
- BAdI for BusinessPartnerRelationshipBulkCreateRequest_In
- BAdI for BusinessPartnerRelationshipBulkInformation_Out
- BAdI for BusinessPartnerRelationshipBulkUpdateConfirmation_Out
- BAdI for BusinessPartnerRelationshipBulkUpdateRequest_In
- BAdI for BusinessPartnerRelationshipBundleCancelRequestConfirmation_In
- BAdI for BusinessPartnerRelationshipBundleCreateRequestConfirmation_In
- BAdI for BusinessPartnerRelationshipBundleUpdateRequestConfirmation_In
- BAdI for BusinessPartnerRelationshipRetrievalByIdentifyingElementsQueryResponse_In

See also

For more information about the new Enterprise Services, see the release note **Enterprise Services for FS-BP (New)**.

Distribution of Business Partner Data (Enhanced)

Use

As of SAP NetWeaver 7.4, Support Package Stack 2, you can control which business partner roles are ignored when data is transferred from a source system to a target system.

This applies, for example, to the transfer of data using the following channels:

- Replication via SAP NetWeaver Process Integration (XI)
- Intermediate document (IDoc)
- Complex structure (BUS_EI_EXTERN)

Effects on Customizing

You make the Customizing settings for this function in Customizing for SAP Business Partner for Financial Services under *Settings for Financial Services -> Interfaces/Data Exchange -> Data Replication -> Define Business Partner Roles to Be Ignored*.

Business Function Harmonization of CRM Web Client UI

CRM_FS_BPHEAD_UI: Business Function Harmonization of CRM Web Client UI (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, the business function ***Harmonization of CRM Web Client UI for SAP Business Partner for Financial Services (FS-BP)*** (CRM_FS_BPHEAD_UI) is available. With this business function, in addition to the CRM Web Client UI assignment blocks already available for FS-BP, you can automatically benefit from new or changed assignment blocks provided by *SAP Business Partner (AP-MD-BP)*.

Business Function CRM-FS, Guided Loan Origination Process

CRM_FS_NBRNWL_1: Business Function CRM-FS, Guided Loan Origination Process (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, the business function ***CRM-FS, Guided Loan Origination Process*** (CRM_FS_NBRNWL_1) is available. With this business function, you can implement several new features for the account origination core process.

For more information, see the following release notes:

- **CRM_FS_NBRNWL_1: Loan Wizard (New)**
- **CRM_FS_NBRNWL_1: Banking Opportunity (New)**
- **CRM_FS_NBRNWL_1: Banking Customer Quote (New)**
- **CRM_FS_NBRNWL_1: Personal Financial Statement (New)**
- **CRM_FS_NBRNWL_1: Banking Sales Contract (New)**
- **CRM_FS_NBRNWL_1: Usage of BRFplus (New)**
- **CRM_FS_NBRNWL_1: Case (Enhanced)**
- **CRM_FS_NBRNWL_1: Document Checklist (New)**
- **CRM_FS_NBRNWL_1: Enterprise Content Management Integration (New)**
- **CRM_FS_NBRNWL_1: Enterprise Services (New)**
- **CRM_FS_NBRNWL_1: New Features in Customizing for Account Origination (New)**

Effects on Customizing

You have to make settings in Customizing for account origination for some of the new features. For more information about the settings, see the relevant release note for the new feature.

See also

SAP Library for Account Origination on SAP Help Portal at <http://help.sap.com/crm> -> ***SAP EHP3 for SAP CRM 7.0 -> SAP Customer Relationship Management -> Business Functions for SAP Customer Relationship Management -> CRM-FS, Guided Loan Origination Process.***

SAP Library for Account Origination on SAP Help Portal at <http://help.sap.com/CRM> -> ***SAP EHP3 for SAP CRM 7.0 -> SAP Customer Relationship Management -> SAP CRM for Industries-> Financial Services -> Account Origination.***

CRM_FS_NBRNWL_1: Loan Wizard (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **CRM-FS, Guided Loan Origination Process** (CRM_FS_NBRNWL_1), the new **loan wizard** is available. The loan wizard offers a logical sequence of steps on the WebClientUI that guide a relationship manager at a local bank's branch office step-by-step through the account origination process for retail loans.

You can start the loan wizard from the overview page of a banking opportunity under **Launch Loan Wizard**.

The loan wizard contains the following steps:

1. Analyze Need

The Analyze Need step leads you through the **need analysis** with the customer. Each item in the Analyze Need step corresponds to a concrete customer need. You can create new need items in this step or edit existing need items. A need item contains information about the customer's need, their loan requirement, the envisaged loan contract and, if applicable, property. Information about a need entered on the overview page of the banking opportunity is automatically made available in this step. The need analysis helps to determine eligible sales products to meet the customer's need.

2. Select Products

After a need item is available, you proceed to the Select Products step. Business Rule Framework Plus (**BRFplus**) rules are triggered by the system to determine the eligible products for the captured need. In this step, the system executes various checks, for example if the **loan-to-value ratio** is met or if the age of the business partner is within the specified range. The product determination is made for editable and new needs only. The proposed products are displayed in a list. You can select the products in which the customer shows interest. A banking customer quote is generated in the background for the selected sales products.

3. Select Variant

In this step, you select the product variant for which you want to determine the price and payment conditions and calculate the payment plan. You can change the important parameters of a variant by changing the data directly or by copying the variant to a new variant. You can, for example, change the loan term, annuity amount, payment frequency, and condition fixing data.

4. Price Determination and Payment Plan

In this step, you determine the price and calculate the payment plan for your chosen product variant. You can also copy the provided standard price and payment conditions and create new individual conditions within the limits maintained in BRFplus. The system uses enterprise services to retrieve the standard prices and calculate the payment plan from the account-managing system.

5. Maintain Personal Financial Statement

In this step, you can search for a customer's personal **financial statement** or create a personal financial statement for the customer. Depending on its status, you can change the personal financial statement. Based on the provided personal financial statement data (assets, liabilities, income, expenses), you can calculate the following personal financial statement ratios to analyze the customer's financial situation:

- Disposable income
- Net worth
- Total debt service ratio

If required, you can remove a personal financial statement from the loan wizard (not from the database) and search for another personal financial statement.

6. Manage Collateral

In this step, you calculate new collateral constellations to identify either free collateral value and or a coverage gap and store the data in the related banking customer quote. You can read **collateral constellations** from a collateral-managing system. You can analyze the collateral constellation and create further collateral constellation details. You can edit and delete the collateral agreements, scope, and charges that have been created in the CRM system. You can also create **individual valuables** and use them in the collateral constellation calculation.

7. Document Handling

In this step, you store the documents required for the related banking customer quote. To do so, you can read a checklist for the documents that must be available for the banking customer quote. The checklist is displayed according to the BRFplus rules maintained for the available document types. If the documents were attached in Enterprise Content Management, then the corresponding attachment status is displayed. You can check if the required documents are available. If yes, the checklist status is set to complete. If no, the checklist status is set to incomplete and you can upload the missing documents in the related case. You can optionally waive off documents. Waived-off documents will not be checked for checklist completion.

8. BP Additional Information

In this step, you complete the required business partner information. You can add employment details and address details for the business partner. You can execute an internal rating for the business partner and display information about their creditworthiness. You can also enter the clearing account information for the banking customer quote.

9. Finalize Offer

In this step, you finalize the banking customer quote for the customer. Important data relating to the offer is summarized. You can display previously calculated results of the personal financial statement and, if required, you can calculate the collateral constellation. Once the offer has been accepted by the customer, the banking customer quote is sent for adjudication by the bank.

You can change the order of the steps. For more information, see SAP Library for Account Origination under **Banking Opportunity -> Loan Wizard**.

Effects on Customizing

You can print PDF-based forms in the loan wizard. The following sample print templates are available in the Customizing activity **Define Print Templates for Loan Wizard**:

<u>Transaction Type</u>	<u>Form Name</u>	<u>Name</u>
----	CRM_FS_10_PRINT_VAR_COMPARE	Variant
Comparison		
BK01	CRM_FS_10_BCQ_LOAN_LETTER	Covering Letter
BK01	CRM_FS_10_BCQ_PAYMENT_PLAN	Payment Plan
BK01	CRM_FS_10_QUOTATION	Retail Mortgage Loan Offer
BK03	CRM_FS_10_BCQ_LOAN_LETTER	Covering Letter
BK03	CRM_FS_10_BCQ_PAYMENT_PLAN	Payment Plan
BK03	CRM_FS_10_QUOTATION	Retail Loan Offer

You can change the implementations of the print templates in the **BAdI: Quotation Printing** or create your own implementations.

For more information about the required Customizing settings, see the release notes under **See Also**.

See also

Release Note **CRM_FS_NBRNWL_1: Guided Loan Origination Process (New)**

Release Note **CRM_FS_NBRNWL_1: Banking Opportunity (New)**

Release Note **CRM_FS_NBRNWL_1: Banking Customer Quote (New)**

Release Note **CRM_FS_NBRNWL_1: Personal Financial Statement (New)**

Release Note **CRM_FS_NBRNWL_1: Case (Enhanced)**

Release Note **CRM_FS_NBRNWL_1: Document Checklist (New)**

Release Note **CRM_FS_NBRNWL_1: Enterprise Content Management Integration (New)**

Release Note **CRM_FS_NBRNWL_1: Enterprise Services (New)**

Release Note **CRM_FS_NBRNWL_1: Usage of BRFplus (New)**

Release Note **CRM_FS_NBRNWL_1: New Features in Customizing for FS-AO (New)**

SAP Library for Account Origination on SAP Help Portal at <http://help.sap.com/CRM> -> SAP EHP3 for SAP CRM 7.0 -> **SAP Customer Relationship Management -> SAP CRM for Industries -> Financial Services -> Account Origination -> Banking Opportunity -> Loan Wizard.**

CRM_FS_NBRNWL_1: Banking Opportunity (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **CRM-FS, Guided Loan Origination Process** (CRM_FS_NBRNWL_1), the new transaction type **Banking Opportunity** is available. Banking opportunities are created when a customer or sales prospect shows an interest in using banking products and services. The banking opportunity comprises the needs and financial requirements of a sales prospect, their requested banking products and banking services, the potential sales volume, and an estimated sales probability.

Banking opportunities are used to store the **need analysis** data of a customer and eligible product proposals.

The banking opportunity is based on the new transaction type **OPBA**. The transaction type **Banking Opportunity** is available for the leading transaction category **Opportunity**. The need analysis data and product proposal enhancements are only available for this new transaction type.

A new assignment block entitled **Need Analysis** has been added to the banking opportunity overview page.

The **Need Analysis** assignment block contains the new need analysis screen that leads you through the need analysis and the product proposal. Each entry in the **Need Analysis** assignment block corresponds to a concrete customer need. To start the need analysis and product proposal, the **New** pushbutton is available.

On the need analysis screen, you enter information about the financial requirement, the property details, and the expected contract details. You can enter the customer's need and retrieve a product proposal. After your confirmation, the proposed products are displayed in the **Items** assignment block. After you have proposed a product for a need item and saved that need item, you cannot change the same need item again.

You can copy an existing need item in the **Need Analysis** assignment block. To create banking customer quotes for selected products in the **Items** assignment block of the banking opportunity, you can create a case and execute scheduled actions from it.

If you copy the entire banking opportunity, any product items that have been created are also copied. To perform the need analysis, create a new need and propose the products again.

You cannot delete an individual need item.

The line entries in the **Need Analysis** assignment block cannot be edited once products are proposed and saved for that particular need.

The new UI components BTFS_OPPT and BTFS_NEED (model node BT in Runtime Repository Browser) contain all the UI-related enhancements for the opportunity. The following new dependent objects have been added to the BOL model for component BT:

- BTFS_Need_H (for need analysis attributes)
- BTFS_Prod_Prop_I (for product proposal attributes)
- BPCA (for business process chain assignment)

The banking opportunity also contains the new **loan wizard**. The loan wizard offers a logical sequence of steps on the WebClientUI that guide a relationship manager at a local bank's branch office step-by-step through the account origination process for retail loans. You can start the loan wizard from the overview page of a banking opportunity under **Launch Loan Wizard**.

For more information about the loan wizard, see the release note **CRM_FS_NBRNWL_1: Loan Wizard (New)**.

Effects on System Administration

You can use the archiving object CRM_OPPT to archive banking opportunities after newly created extensions have been registered.

Effects on Customizing

- You must execute the Customizing activities for **BRFplus Rules** before you can perform calculations in the banking opportunity. For more information, see **BRFplus Rules** in Customizing for Account Origination.
- You must define the transaction types that are relevant for banking opportunities in the Customizing activity **Define Transaction Types**.
- You can define your own need categories and need types for the need analysis process in the Customizing activities **Define Need Categories** and **Define Need Types**.
You can also create your own fields for the need analysis step. For more information, see SAP Library for Account Origination under **Enhancing the Need Analysis Step**.

See also

Release Note **CRM_FS_NBRNWL_1: Usage of BRFplus (New)**

Release Note **CRM_FS_NBRNWL_1: Enterprise Services (New)**

Release Note **CRM_FS_NBRNWL_1: Loan Wizard (New)**

Release Note **CRM_FS_NBRNWL_1: New Features in Customizing for FS-AO (New)**

Release Note **CRM_FS_NBRNWL_1: Guided Loan Origination Process (New)**

SAP Library for Account Origination on SAP Help Portal at <http://help.sap.com/CRM> -> SAP EHP3 for SAP CRM 7.0 -> **SAP Customer Relationship Management -> SAP CRM for Industries-> Financial Services -> Account Origination-> Banking Opportunity**.

CRM_FS_NBRNWL_1: Banking Customer Quote (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **CRM-FS, Guided Loan Origination Process** (CRM_FS_NBRNWL_1), the new transaction type **Banking Customer Quote** is available. Banking customer quotes are quotations by the bank to a customer for an agreement on banking products and banking services with specific terms and conditions. Banking customer quotes contain products from the broad range of financial services. For example, typical banking products and services include retail mortgage loans and installment loans.

A banking customer quote captures the details of the offer given to the customer. These include, for example, information about the sales product, business partner details, organizational unit details, pricing and payment conditions, payment schedule, collateral constellation details, and calculated personal financial statement ratios.

The functions that you use to calculate a payment schedule and collateral in banking customer quotes are executed in an account-managing system connected to the CRM system.

The banking customer quote is based on the new transaction type **BKQ1**. The transaction type BKQ1 is created for the existing business object BUS2000114 (Financing Contract) with the transaction classification A.

The banking customer quote transaction type is available for the leading transaction category **Financing Contract**. The work center link group **Acquisition and Sales** contains the new link **Banking Customer Quote**.

The sample products use the BASE_FS_LOAN06 (**Retail Mortgage Loan**) product category. If the **Collateral Required** checkbox is set in the product, collateral is required. The banking customer quote cannot be used with products based on product category BASE_FS_BNDL (Product Bundle).

The following new functions have been added to the banking customer quote overview page:

- In addition to the standard assignment blocks for business transactions, you can find the following financial services-specific assignment block at header level:
 - Personal Financial Statement Ratios
You can trigger the calculation of the following ratios for a **personal financial statement** and store them in the banking customer quote: net worth, disposable income of the business partner, and total debt service (TDSR) ratio.
- You can find the following financial services-specific assignment blocks at item level:
 - Product Variants
This is where you can create **product variants**. Product variants are used to show different proposals and calculations for the same product to the customer. You can use product variants to see how a loan would change if you change important parameters of the loan. For example, you would like to know what the payment plan looks like if you change the loan term or the annuity amount. In the product variant, you can determine the loan price and payment conditions for the customer. You can query the standard price conditions from a loan account-managing system.
In the settlement conditions and payment conditions, you can change the retrieved standard price conditions by copying the values into new individual conditions. You can also apply special prices based on the defined business rules. For a selected product variant in the banking customer quote, the negotiated price conditions and all the payment conditions are stored as individual conditions within the Financial Conditions component CA-FIM-FCO in SAP CRM.
BRFplus rules validate whether the individualization of the standard condition is allowed for the relationship manager. For more information about the available BRFplus rules, see **CRM_FS_NBRNWL_1: Usage of BRFplus (New)**.
In the product variant, you can also calculate a payment plan for the customer. The

payment plan is calculated for the condition fixing period. The result of the calculation is available in the **Payment Plan** and in the **Payment Key Figures**. The payment key figures consist of the following: effective interest rate, cost of borrowing, calculated annuity, total number of payments, and the planned final payment amount. The payment plan is determined in a loan account-managing system, transferred to the banking customer quote, and stored in the product variant.

- Clearing Account
You can specify the details for a clearing **account** that already exists in your account-managing system.
- Individual Valuable
You can create **individual valuables** and use them in collateral constellation calculations. You can edit and delete individual valuables that have been created in the CRM system.
- Collateral Constellation
You can read **collateral constellations** from a collateral-managing system. You can analyze the collateral constellation and create further collateral constellation details, such as collateral agreements or collateral charges. You can edit and delete the collateral agreements, scope, and charges that have been created in the CRM system. You can calculate new collateral constellations to identify either free collateral value or a coverage gap, and store the calculation parameters in the banking customer quote.

You can print banking customer quotes in PDF format. The following print templates for the item category BK01 are available for banking customer quotes in the Customizing activity **Define Print Templates for Item Category**:

- CRM_FS_1O_BCQ_PAYMENT_PLAN (Payment plan)
- CRM_FS_1O_LEGAL_AGREEMENT (Legal Agreement)
- CRM_FS_1O_QUOTATION (Retail Mortgage Loan)

You can change the implementations of these print templates or create your own implementations in the **BAdI: Quotation Printing**.

When the status of the banking customer quote is updated to **Signed**, client roles related to the back-end system are added to the business partner. The business partner data is then replicated in the corresponding business partner roles in the back-end systems.

Effects on System Administration

The archiving object CRM_LEAS is available for the archiving of banking customer quotes.

You use the authorization object Authorization Level (CRM_FS_LVL) to control the authorization levels for a relationship manager. The assigned values are used in the BRFplus to check if the negotiated values are within the permissible range for the relationship manager.

Effects on Customizing

- In the Customizing activity **Define Item Categories**, we provide the item category BK01 (**Real Estate Finance**) for the banking customer quote. For this item category, the CRM pricing functions are disabled (the **Pricing-rel.** checkbox is deselected in the Customizing activity **Define Item Categories**). This item category is, therefore, configured to use the pricing functions provided by the Financial Conditions component CA-FIM-FCO. To determine the price and payment conditions with the Financial Conditions component, you must configure the Customizing settings for Financial Conditions. To do so, you execute the Customizing activities **Enable FICO Pricing for Item Category**, **Define Condition Group Types**, **Define Condition Types**, and **Define Authorization Levels**.
- You can influence the determination of price and payment conditions using the following Business Add-In:
 - **BAdI: Mapping of Variant Fields to Payment Condition Fields**

- You can automatically get the standard conditions for a variant on the UI without explicitly choosing the **Determine Price** pushbutton using the following Business Add-In:
 - **BAdI: Get Determined Standard Conditions for a Variant**
- To create collateral information, you must execute the Customizing activity **Assignment of Asset Types to Collateral Agreement Types**.
- If you create your own business rules for the calculations in a banking customer quote, you must execute the Customizing activities Define **Processes That Use BRFplus Business Rules** and **Assign Processes to BRFplus Business Rules**. You can implement the **BAdI: Calculations for Personal Financial Statement** to influence how you calculate ratios for the customer, such as the total debt service ratio.
- If you want to change the business rules for banking customer quotes, you can create your own implementation under **BAdI: Business Rules for a Banking Customer Quote**.

See also

Release Note **CRM_FS_NBRNWL_1: Enterprise Services (New)**

Release Note **CRM_FS_NBRNWL_1: Personal Financial Statement (New)**

Release Note **CRM_FS_NBRNWL_1: Usage of BRFplus (New)**

Release Note **CRM_FS_NBRNWL_1: Guided Loan Origination Process (New)**

SAP Library for Account Origination on SAP Help Portal at <http://help.sap.com/CRM> -> SAP EHP3 for SAP CRM 7.0 -> **SAP Customer Relationship Management -> SAP CRM for Industries -> Financial Services -> Account Origination -> Quotation Types -> Banking Customer Quote**.

CRM_FS_NBRNWL_1: Personal Financial Statement (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **CRM-FS, Guided Loan Origination Process** (CRM_FS_NBRNWL_1), the new business object **Personal Financial Statement** is available.

A personal financial statement is a statement about the financial situation of a person at a specific point in time. Personal financial statements are used, for example, when a business partner applies for a financial services product or as part of regular risk reviews with the customer. A personal financial statement provides information about the financial position of a business partner. It enables banks to capture the assets, liabilities, incomes and expenses of this person. The information provided is particularly important when the bank decides to provide a loan to the business partner. The personal financial statement data is used to evaluate the open commitments of a business partner and their ability to repay their commitments.

The work center link group **Acquisition and Sales** contains the new link **Personal Financial Statements**.

The personal financial statement provides functions to find, read, maintain, copy, calculate, print, and archive the personal financial statements of a business partner.

The personal financial statement consists of the following assignment blocks:

- **Details**
- **Asset Details**
- **Income Details**
- **Liability Details**
- **Expense Details**
- **Calculation Details**
- **Organizational Data**

The income and expenses statement is a quantitative description of the different incomes and expenses that are accrued for a business partner for a certain period. The asset and liability statement lists all the assets and liabilities of a business partner.

You can perform the following financial calculations in the personal financial statement:

- Net disposable income
- Net worth
- Total debt service ratio

For more information about the calculations, see **CRM_FS_NBRNWL_1: Usage of BRFplus (New)**.

Effects on System Administration

The personal financial statement application is implemented with the Extensible Objects (XO) framework (transaction XO_COCKPIT). The **Personal Financial Statement** (FINANCIAL_STATEMENT) business object type is configured here.

You can add your own fields to the business object nodes for the personal financial statement. You use the Application Enhancement Tool (AET) to do this.

You use the authorization object **Personal Financial Statement** (CRM_FS_PFS) to control the authorizations for the **Personal Financial Statement** business object.

The GenIL component PFS is available for the personal financial statement.

You can use the archiving object CRM_FS_PFS to archive personal financial statements.

Effects on Customizing

To determine the number assignment for personal financial statements, you make settings in the following Customizing activities:

- **Define Number Ranges**
- **Select Number Range To Be Used**

For calculations and payment frequencies, you make settings in the following Customizing activities:

- **Define Calculation Types**
- **Define Frequency**

You can define country-specific personal financial statement item types in the following Customizing activities:

- **Define Country-Specific Income Types**
- **Define Country-Specific Expense Types**
- **Define Country-Specific Asset Types**
- **Define Country-Specific Liability Types**

If you want to change the ratio calculations, for example the TDSR calculation, you can create your own implementation for the calculation under **BAdI: Calculations for Personal Financial Statement**.

You can execute your own checks for the status transitions of a personal financial under **BAdI: PFS Status Checks**.

You can influence how you print personal financial statements under **BAdI: Print Functions for Personal Financial Statements**.

If you want to use a customer-specific print template, you must activate it in the Customizing activity **Activate Print Templates for Personal Financial Statements**. You can use the CRM_FS_PFS_PRINT print form as a template.

You can change how the system executes the archiving preprocessing checks for personal financial statements under **BAdI: PFS Archiving Checks**.

You can define a residence time and resubmission time for the archiving of personal financial statements in the Customizing activity **Define Res. Time and Resubmission Time for PFS**.

See also

Release Note **CRM_FS_NBRNWL_1: Guided Loan Origination and Renewal Process (New)**

Release Note **CRM_FS_NBRNWL_1: Usage of BRFplus (New)**

Release Note **CRM_FS_NBRNWL_1: Enterprise Services (New)**

SAP Library for Account Origination on SAP Help Portal at <http://help.sap.com/CRM> -> SAP EHP3 for SAP CRM 7.0 -> **SAP Customer Relationship Management -> SAP CRM for Industries -> Financial Services -> Account Origination -> Master Data -> Personal Financial Statement**.

CRM_FS_NBRNWL_1: Banking Sales Contract (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **CRM-FS, Guided Loan Origination Process** (CRM_FS_NBRNWL_1), the new transaction type **Banking Sales Contract** is available. A banking sales contract is a sales agreement that contains the conditions negotiated for banking products and services.

The banking sales contract is created from a banking customer quote during the onboarding process of the related operational contracts. For more information about the enterprise services that create the banking sales contract, see **CRM_FS_NBRNWL_1: Enterprise Services (New)**.

A banking sales contract represents the legal agreement between the bank and the customer. It contains certain details captured from the banking customer quote. These include, for example, information about the parties involved (for example borrower or co-borrower), loan details, the sales product, pricing and payment conditions, payment schedule, and references to the related operational contracts. The banking sales contract is created after the legal contract is created.

You can search for banking sales contracts and display them on the CRM WebClient UI.

In comparison to banking customer quotes, banking sales contracts contain only a selective number of assignment blocks. These include, for example, pricing condition, payment condition, payment plan, basic details. Details such as PFS ratio, or collateral constellations are not available in banking sales contracts.

The banking sales contract is based on the new transaction type **BKC1**. The transaction type BKC1 is created for the existing business object BUS2000114(Financing Contract) with transaction classification B. The banking sales contract transaction type is available for the leading transaction category **Financing Contract**. The work center link group **Acquisition and Sales** contains the new link **Banking Sales Contract**.

Effects on Customizing

You must assign the transaction type for your banking sales contract to the related transaction type for the banking customer quote in the new Customizing activity **Assign Banking Sales Contract to Banking Customer Quote**.

See also

Release Note **CRM_FS_NBRNWL_1: Enterprise Services (New)**

Release Note **CRM_FS_NBRNWL_1: Guided Loan Origination Process (New)**

SAP Library for Account Origination on SAP Help Portal at <http://help.sap.com/CRM> -> SAP EHP3 for SAP CRM 7.0 -> **SAP Customer Relationship Management -> SAP CRM for Industries-> Financial Services -> Account Origination-> Banking Sales Contract**.

CRM_FS_NBRNWL_1: Usage of BRFplus (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, , business function **CRM-FS, Guided Loan Origination Process** (CRM_FS_NBRNWL_1), you can use the Business Rule Framework Plus (BRFplus) to define rules for checks and calculations that the system executes for the following processes in account origination:

- Need analysis and product proposal in the banking opportunity
- Price negotiation in the banking customer quote and release the banking customer quote for adjudication
- Calculation of the personal financial statement and assignment of the personal financial statement to the banking customer quote
- Determination of the document checklist

For these processes, BRFplus is used as a tool to facilitate calculations and to arrive at decisions.

- An editable customizing application (FS_AO_BRFPLUS_CUSTOMIZING) is available for the following functions:
 - Function CRM_FS_FN_PFS_DISP_INC for the calculation of the disposable income in a personal financial statement
 - Function CRM_FS_FN_PFS_NETWORKTH for the calculation of the network in a personal financial statement
 - Function CRM_FS_FN_PFS_FREQ_CONV_EXP for the calculation of the monthly expenses in a personal financial statement
 - Function CRM_FS_FN_PFS_FREQ_CONV_INC for the calculation of the monthly income in a personal financial statement
 - Function CRM_FS_FN_BCQ_PFS_CALC_ROLES for the inclusion of the relevant business partner roles in a personal financial statement.
 - Function CRM_FS_FN_BOP_LTV for the calculation of the loan-to-value ratio in the banking opportunity processing.
 - Function CRM_FS_FN_BOP_PROD_PROP to determine eligible products in the banking opportunity.
 - Function CRM_FS_FN_PFS_TDS for the calculation of the total debt service ratio in a personal financial statement.
 - Function CRM_FS_FN_DCL_CHECKLIST to get a dynamic checklist based on the case type used.
 - Function CRM_FS_FN_BCQ_VARIANT_CHECK (Variant Correctness) to determine eligible products in the banking customer quote.
 - Function CRM_FS_FN_NEGO_RANGE (Negotiation Range) to check if the negotiation on a particular condition is within the allowed range for a relationship manager.

Effects on System Administration

To define BRFplus rules for calculations and checks, users require the role **BRFplus Administrator** (SAP_BC_FDT_ADMINISTRATOR).

Effects on Customizing

In Customizing activity **Define Processes That Use BRFplus Business Rules** , you must define the processes and subprocesses for the BRFplus business rules that you want to use in your origination scenario.

In Customizing activity **Assign Processes to BRFplus Business Rules**, you must assign the processes and subprocesses to the BRFplus business rules that you want to use in your origination scenario.

To influence the calculations and checks in your origination scenario, you can implement the following BAdIs:

- **BAdI: Business Rules for a Banking Customer Quote**
- **BAdI: TDSR Calculation for Personal Financial Statement**
- **BAdI: Calculations for a Banking Opportunity**
- **BAdI: Document Checklist**

See also

Release Note **CRM_FS_NBRNWL_1: Guided Loan Origination and Renewal Process (New)**

Release Note **CRM_FS_NBRNWL_1: Banking Opportunity (New)**

Release Note **CRM_FS_NBRNWL_1: Banking Customer Quote (New)**

Release Note **CRM_FS_NBRNWL_1: Personal Financial Statement (New)**

Release Note **CRM_FS_NBRNWL_1: Document Checklist (New)**

SAP Library for Account Origination on SAP Help Portal at <http://help.sap.com/CRM> -> SAP EHP3 for SAP CRM 7.0 -> **SAP Customer Relationship Management -> SAP CRM for Industries-> Financial Services -> Account Origination-> BRFplus for Account Origination.**

CRM_FS_NBRNWL_1: Case (Enhanced)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **CRM-FS, Guided Loan Origination Process** (CRM_FS_NBRNWL_1), the following features have been added to the CRM Case component:

- Scheduled actions: A new action profile has been created. When you execute scheduled actions from the case the selected products are read from the banking opportunity and filled in the banking customer quote.
- New record model: The new record model *Real Estate Financing - Secured Lending* (FSSL) has been created. It contains the following new nodes: Banking Customer Quote and Personal Financial Statement (PFS). Note that the Financing Contract node will not be available under the new record model.
- Enterprise Content Management integration: The CRM Case component is integrated with Enterprise Content Management (ECM) functions.
- Document checklist: In the CRM Case component, the *Document Checklist* assignment block has been added.

Effects on Customizing

- In the Customizing activity *Define Case Types*, the following two new case types are available:
Customer Relationship Management -> Financial Services -> Account Origination -> Case Management for Financial Services -> Case Management: Standard Settings -> Basic Settings -> Define Case Types
 - FSSL (Secured Lending)
 - FSUL (Unsecured Lending)
- In the Customizing activity *Define Action Profiles and Actions*, the new action profile CRM_FS_CASE_AO (*Action Profile for FS Case Management*) is available.
Customer Relationship Management -> Financial Services -> Account Origination -> Case Management for Financial Services -> Case Management: Standard Settings -> Extended Customizing -> Process Actions -> Define Action Profiles and Actions
- In the Customizing activity *Create/Change Case Record Model*, the new record model *Real Estate Financing-Secured Lending* (FSSL) with record model ID SRM_MOD02 0090FA0D8DC21ED299A86E4602038090 has been created. Note that the old record model *Mortgage Loan (FSO1)* is no longer valid.
Customer Relationship Management -> Financial Services -> Account Origination -> Case Management for Financial Services -> Case Management: Standard Settings -> Extended Customizing -> Special Settings -> Create/Change Case Record Model
- The document checklist does **not** use the settings made in the Customizing activity *Assign Process Category to Document Type*.
Customer Relationship Management -> Financial Services -> Account Origination -> Case Management for Financial Services -> Document Management -> Assign Process Category to Document Type
- In the Customizing activity *Assign Process Category to Case Type and Transaction Type*, you define which case types are required to use Enterprise Content Management (ECM) and the document checklist. Two new checkboxes entitled *ECM Required* and *DCL Required* have been added to this Customizing activity.
Note: If you want to use the document checklist you must enable ECM.
Customer Relationship Management -> Financial Services -> Account Origination -> Case Management for Financial Services -> Process Control -> Assign Process Category to Case Type and Transaction Type

See also

Release Note **CRM_FS_NBRNWL_1: Guided Loan Origination Process (New)**

Release Note **CRM_FS_NBRNWL_1: Enterprise Content Management Integration (New)**

Release Note **CRM_FS_NBRNWL_1: Document Checklist (New)**.

SAP Library for Account Origination on SAP Help Portal at <http://help.sap.com/CRM> -> *SAP EHP3 for SAP CRM 7.0 -> SAP Customer Relationship Management -> SAP CRM for Industries-> Financial Services -> Account Origination-> Case Management in Account Origination.*

CRM_FS_NBRNWL_1: Document Checklist (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **CRM-FS, Guided Loan Origination Process** (CRM_FS_NBRNWL_1), you can determine the list of documents required for the loan origination process dynamically according to customized business rules. The document checklist function lists all required documents and checks if these documents are either attached in the ECM Repository or have been waived explicitly. If the mandatory documents in the checklist are either attached or waived, the checklist is complete. Otherwise it is incomplete.

The document checklist is a stand-alone function that we deliver integrated with the CRM Case. On the WebClient user interface you find the document checklist in the new assignment block **Document Checklist**. You can also display the business rules used in the new section **Rules**. BRFplus rules are used to determine the document checklist. These rules can be enhanced by the customer.

Effects on Customizing

You make the Customizing settings for this function in Customizing for CRM Financial Services in the following Customizing activities:

Financial Services -> Account Origination -> Document Management with Document Checklist and ECM

-> *General Settings:*

- **Define Document Types**
- **Define Document Groups**
- **Assign Document Types to Document Groups**
- **Define Business Object Types**

-> *Document Checklist Specific Settings:*

- **Define Business Processes**
- **Assign Business Object Types to Business Processes**

-> *Business Add-Ins (BAdIs):*

- **BADI: Validating Completion of Document Checklist**

Financial Services -> Account Origination -> BRFplus Rules:

- **Assign Processes to BRFplus Business Rules**

Financial Services -> Account Origination -> BRFplus Rules -> BAdIs for BRFplus Rules:

- **BAdI: Business Rules for Document Checklist**

Financial Services -> Account Origination -> Document Management with Document Checklist and ECM -> Business Add-Ins (BAdIs)

- **BAdI: Business Object Keys**

Note:

The document checklist does **not** use the settings made in the Customizing activity *Assign Process Category to Document Type*.

*Customer Relationship Management -> Financial Services -> Account Origination -> Case Management for Financial Services -> Document Management -> **Assign Process Category to Document Type**.*

See also

Release Note **CRM_FS_NBRNWL_1: Guided Loan Origination Process (New)**

Release Note **CRM_FS_NBRNWL_1: Enterprise Content Management Integration (New)**

Release Note **CRM_FS_NBRNWL_1: Usage of BRFplus (New)**

SAP Library for Account Origination on SAP Help Portal at <http://help.sap.com/CRM> -> *SAP EHP3 for SAP CRM 7.0 -> SAP Customer Relationship Management -> SAP CRM for Industries-> Financial Services -> Account Origination-> Case Management in Account Origination -> Document Management in the Case.*

CRM_FS_NBRNWL_1: Enterprise Content Management Integration (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **CRM-FS, Guided Loan Origination Process** (CRM_FS_NBRNWL_1), you can store and manage documents in Enterprise Content Management (ECM).

Enterprise Content Management is a reusable infrastructure that can be used by different business objects of SAP Account Origination (for example CRM case, banking customer quote, banking sales contract, personal financial statement) to store and manage documents that are related to a business case. We deliver Enterprise Content Management integrated with the CRM Case. You can upload documents into ECM, view uploaded documents and their properties, change the properties of the documents, delete uploaded documents, and create and delete the related folder structure for the documents.

On the WebClient UI, Enterprise Content Management is available in the case in the **Attachments in ECM** assignment block.

Effects on Customizing

You make the Customizing settings for this function in Customizing for SAP NetWeaver in the following Customizing activities:

SAP NetWeaver -> Application Server -> Basis Services -> Enterprise Content Management Integration:

- **Configure ECMI Repository:** Here you can configure an ECM repository according to the customer's needs.
- **Configure ECMI Application:** Here you can map the ECM application that we deliver with the customer's repository configured in the previous step. The following application is predefined:
 - Application: {http://sap.com/xmlns/ecm/CRM/FS}Attachment
 - Description: FS: ECM Attachment in CRM
 - It is not multi-repository enabled.
- **Create ECMI Application:** Here you can create a customer-specific ECM application. Note that in this case you have to do your own development and cannot use the predefined application.

See also

Release Note **CRM_FS_NBRNWL_1: Guided Loan Origination Process (New)**

Release Note **CRM_FS_NBRNWL_1: Document Checklist (New)**

SAP Library for Account Origination on SAP Help Portal at <http://help.sap.com/CRM> -> *SAP EHP3 for SAP CRM 7.0 -> SAP Customer Relationship Management -> SAP CRM for Industries-> Financial Services -> Account Origination-> Case Management in Account Origination -> Document Checklist.*

CRM_FS_NBRNWL_1: Enterprise Services (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **CRM-FS, Guided Loan Origination Process** (CRM_FS_NBRNWL_1), the following Enterprise Services are available for account origination as XI interfaces.

Note that switching on the business function does not impact the Enterprise Services themselves. Nevertheless they were created to be used with the functions enabled with the business function CRM_FS_NBRNWL_1 (CRM-FS, Guided Loan Origination Process) in SAP enhancement package 3 for SAP CRM 7.0.

Banking Customer Quote (business object)

You can use the Banking Customer Quote business object and the related Enterprise Services to query and manage banking customer quotes. These Enterprise Services enable service-based communication to account origination in SAP CRM:

- BankingCustomerQuoteCRMBulkCreateConfirmation_Out (service interface)
- BankingCustomerQuoteCRMBulkCreateRequest_In (service interface)
- BankingCustomerQuoteCRMBulkUpdateConfirmationOut (service interface)
- BankingCustomerQuoteCRMBulkUpdateRequest_In (service interface)
- BankingCustomerQuoteCRMByIDQueryResponse_In (service interface)
- BankingCustomerQuoteCRMCreateCheckQueryResponse_In (service interface)
- BankingCustomerQuoteCRMCreateRequestConfirmation_In (service interface)
- BankingCustomerQuoteCRMBasicDataByElementsQueryResponse_In (service interface)
- BankingCustomerQuoteCRMUpdateCheckQueryResponse_In (service interface)
- BankingCustomerQuoteCRMUpdateRequestConfirmation_In (service interface)

Banking Sales Contract (business object)

You can use the Banking Sales Contract business object and the related Enterprise Services to query and manage banking sales contracts. These Enterprise Services enable service-based communication to account origination in SAP CRM:

- BankingSalesContractCRMBasicDataByElementsQueryResponse_In (service interface)
- BankingSalesContractCRMBulkCreateConfirmation_Out (service interface)
- BankingSalesContractCRMBulkCreateRequest_In (service interface)
- BankingSalesContractCRMBulkUpdateConfirmation_Out (service interface)
- BankingSalesContractCRMBulkUpdateRequest_In (service interface)
- BankingSalesContractCRMByIDQueryResponse_In (service interface)
- BankingSalesContractCRMCreateCheckQueryResponse_In (service interface)
- BankingSalesContractCRMCreateRequestConfirmation_In (service interface)
- BankingSalesContractCRMUpdateCheckQueryResponse_In (service interface)
- BankingSalesContractCRMUpdateRequestConfirmation_In (service interface)

Personal Financial Statement (business object)

You can use the Personal Financial Statement business object and the related Enterprise Services to manage **personal financial statements**. These Enterprise Services enable service-based communication to account origination in SAP CRM:

- PersonalFinancialStatementCRMBulkUpdateConfirmation_Out

- PersonalFinancialStatementCRMBulkUpdateRequest_In
- PersonalFinancialStatementCRMCreateRequestConfirmation_In
- PersonalFinancialStatementCRMUpdateRequestConfirmation_In
- PersonalFinancialStatementCRMByIDQueryResponse_In
- PersonalFinancialStatementCRMCancelRequestConfirmation_In
- PersonalFinancialStatementCRMSimpleByElementsQueryResponse_In
- PersonalFinancialStatementCRMDeclareRequestConfirmation_In
- PersonalFinancialStatementCRMBulkCreateRequest_In
- PersonalFinancialStatementCRMCancellationBulkRequest_In
- PersonalFinancialStatementCRMBulkDeclareRequest_In
- PersonalFinancialStatementCRMBulkCreateConfirmation_Out
- PersonalFinancialStatementCRMCancellationBulkConfirmation_Out
- PersonalFinancialStatementCRMBulkDeclareConfirmation_Out
- PersonalFinancialStatementCRMCalculationQueryResponse_In

Effects on Customizing

In Customizing for *Financial Services*, execute the Customizing activities under **Basic Functions -> Connection of External Systems -> BAdIs for Enterprise Services** to implement BAdIs for the Enterprise Services and the related global data types (GDTs) and banking data types (BDTs).

See also

Release notes:

- **CRM_FS_NBRNWL_1: Guided Loan Origination Process (New)**
- **CRM_FS_NBRNWL_1: Banking Customer Quote (New)**
- **CRM_FS_NBRNWL_1: Banking Sales Contract (New)**
- **CRM_FS_NBRNWL_1: Personal Financial Statement (New)**

CRM_FS_NBRNWL_1: New Features in Customizing for FS-AO (New)

As of SAP enhancement package 3 for SAP CRM 7.0, business function **CRM-FS, Guided Loan Origination Process** (CRM_FS_NBRNWL_1), the structure of the SAP Customizing Implementation Guide for Account Origination (FS-AO) has been changed. To include these changes in the project IMGs, you have to generate these again.

New Customizing activities for Account Origination

- In the area **Account Origination -> Document Management with Document Checklist and ECM -> General Settings:**
 - Define Document Groups
 - Assign Document Types to Document Groups
 - Define Business Object Type Codes
- In the area **Account Origination -> Document Management with Document Checklist and ECM -> Document Checklist Specific Settings:**
 - Define Business Process Type Code
 - Assign Business Object Type Codes to Business Process Type Codes
 - Business Add-Ins: **BAdI: Validating Completion of Document Checklist**
- In the area **Account Origination -> Banking Opportunity:**
 - Define Transaction Types
 - Define Need Categories
 - Define Need Types
- In the area **Account Origination -> Banking Customer Quote -> Financial Conditions:**
 - Enable FICO Pricing for Item Category
 - Define Condition Group Types
 - Define Condition Types
 - Define Authorization Levels
- In the area **Account Origination -> Banking Customer Quote -> Financial Conditions -> Business Add-Ins (BAdIs):**
 - **BAdI: Mapping of Variant Fields to Payment Condition Fields**
 - **BAdI: Get Determined Standard Conditions for a Variant**
- In the area **Account Origination -> Banking Customer Quote -> Collateral Management:**

Assignment of Asset Types to Collateral Agreement Types
This Customizing activity groups together the three steps **Define Asset Types**, **Define Collateral Agreement Types**, and **Assign Asset Types to Collateral Agreement Types**.
- In the area **Account Origination -> Banking Sales Contract: Assign Banking Sales Contract to Banking Customer Quote.**
- In the area **Account Origination -> Personal Financial Statement -> General Settings:**
 - Define Calculation Types
 - Define Frequency
- In the area **Account Origination -> Personal Financial Statement -> Country-Specific Settings:**
 - Define Country-Specific Income Types

- Define Country-Specific Expense Types
- Define Country-Specific Asset Types
- Define Country-Specific Liability Types
- In the area *Account Origination -> Personal Financial Statement -> Number Ranges*:
 - Define Number Ranges
 - Select Number Ranges To Be Used
- In the area *Account Origination -> Personal Financial Statement -> Status Management*:
 - BAdI: PFS Status Checks**
- In the area *Account Origination -> Personal Financial Statement -> Print Functions*:
 - **BAdI: Print Functions for Personal Financial Statements**
 - **Activate Print Templates for Personal Financial Statements**
- In the area *Account Origination -> Personal Financial Statement -> Archiving*:
 - **BAdI: PFS Archiving Checks**
 - **Define Res. Time and Resubmission Time for PFS**
- In the area *Account Origination -> BRFPlus Rules*:
 - **Define Processes That Use BRFplus Business Rules**
 - **Assign Processes to BRFplus Business Rules**
- In the area *Account Origination -> BRFPlus Rules -> BAdIs for BRFplus Rules*:
 - **BAdI: Calculations for a Banking Opportunity**
 - **BAdI: Business Rules for a Banking Customer Quote**
 - **BAdI: Calculations for Personal Financial Statement**
 - **BAdI: Document Checklist**
- **BAdIs for Business Object BankingCustomerQuote** in the area *Financial Services -> Basic Functions -> Connection of External Systems -> BAdIs for Enterprise Services*.
- **BAdIs for Business Object BankingSalesContract** in the area *Financial Services -> Basic Functions -> Connection of External Systems -> BAdIs for Enterprise Services*.
- **BAdIs for Business Object PersonalFinancialStatement** in the area *Financial Services -> Basic Functions -> Connection of External Systems -> BAdIs for Enterprise Services*.
- **BAdIs for Process Object Type LoanQuoteVariantFS** in the area *Financial Services -> Basic Functions -> Connection of External Systems -> BAdIs for Enterprise Services*.
- **BAdIs for Process Object Type NewLoanBoardingFS** in the area *Financial Services -> Basic Functions -> Connection of External Systems -> BAdIs for Enterprise Services*.
- **BAdIs for Code GDTs, BAdIs for ID GDTs and BAdIs for Object GDTs** in the area *Financial Services -> Basic Functions -> Connection of External Systems -> BAdIs for Enterprise Services -> BAdIs for Global Data Types (GDT)*.
- **BAdIs for Intermediate Data Types (IDT)** in the area *Financial Services -> Basic Functions -> Connection of External Systems -> BAdIs for Enterprise Services*.
- **BAdIs for Banking Data Types (BDT)** in the area *Financial Services -> Basic Functions -> Connection of External Systems -> BAdIs for Enterprise Services*.

See also: Release Note CRM_FS_NBRNWL_1: Guided Loan Origination Process (New)

Business Function CRM-FS, Banking Customer Quote Enhancements

CRM_FS_NB_BCQ_1: Business Function CRM-FS, Banking Customer Quote Enhancements (New for SP03)

Use

As of SAP enhancement package 3 (SP03) for SAP CRM 7.0, the business function ***CRM-FS, Banking Customer Quote Enhancements*** (CRM_FS_NB_BCQ_1) is available. With this business function, you can implement several new features for the banking customer quote:

For more information, see the following release notes:

- **CRM_FS_NB_BCQ_1: Banking Customer Quote (Enhanced)**
- **CRM_FS_NB_BCQ_1: New Features in Customizing for Account Origination (New)**

Effects on Customizing

You have to make settings in Customizing for account origination for some of the new features. For more information about the settings, see the relevant release note for the new feature.

See also

SAP Library for Account Origination on SAP Help Portal at <http://help.sap.com/crm> -> SAP EHP3 for SAP CRM 7.0 Support Package 3 -> ***SAP Customer Relationship Management -> Business Functions for SAP Customer Relationship Management -> CRM-FS, Banking Customer Quote Enhancements.***

SAP Library for Account Origination on SAP Help Portal at <http://help.sap.com/CRM> -> SAP EHP3 for SAP CRM 7.0 Support Package 3 -> ***SAP Customer Relationship Management -> SAP CRM for Industries-> Financial Services -> Account Origination.***

CRM_FS_NB_BCQ_1: Banking Customer Quote (Enhanced for SP03)

Use

As of SAP enhancement package 3 (SP03) for SAP CRM 7.0, business function **CRM-FS, Banking Customer Quote Enhancements** (CRM_FS_NB_BCQ_1), the following enhancements are available for the transaction type BKQ1 (**Banking Customer Quote**):

- **Condition Differentiation**

You can specify the contract amount and term of a loan contract. This enables you to differentiate price conditions (such as settlement interest condition) based on differentiation criteria such as the loan amount and loan term (condition fixing duration).

If, during quotation processing, the system determines a standard price from the connected account-managing system, and if condition types are configured to be differentiated according to the loan amount or term, then the system determines differentiated conditions accordingly.

- **Payment Advice**

A banking customer quote captures the details of the offer given to the customer. These details now also include the payment advice. You can enter the payment advice for repayment and disbursement processes. The payment advice includes information about payment methods (such as cash, check or direct transfers) and payment recipients (accounts that receive payments in the case of direct transfers). You can split a single payment between multiple business partners or accounts.

You can display or edit payment advice under **Payment Advice Details** in the item details of a retail loan item. You can also use the loan wizard, where the payment advice details are in the **Business Partner Additional Information** step.

Effects on Customizing

In Customizing for *Account Origination* under **Banking Customer Quote -> Financial Conditions -> Differentiation Characteristics**, you have executed the following Customizing activities:

- **Edit Differentiation Categories**
- **Assign Condition Categories to Differentiation Categories**
- **Define Contract Amount**
- **Define Term**

In Customizing for *Account Origination* under **Banking Customer Quote -> Payment Advice**, you have executed the following Customizing activities:

- **Define Business Process**
- **Define Process Result Type**
- **Define Payment Advice Type**
- **Maintain Settings for Payment Advice**

See also

Release Note **CRM_FS_NB_BCQ_1: CRM-FS, Banking Customer Quote Enhancements (Enhanced)**

Release Note **CRM_FS_NB_BCQ_1: New Features in Customizing for Account Origination (New)**

SAP Library for Account Origination on SAP Help Portal at <http://help.sap.com/CRM> -> SAP EHP3 for SAP CRM 7.0 Support Package 3 -> **SAP Customer Relationship Management -> SAP CRM for Industries -> Financial Services -> Account Origination -> Quotation Types -> Banking Customer Quote-> Maintenance of a Banking Customer Quote -> Maintenance of a Retail Loan Item:**

- o ***Maintenance of Payment Advice***
- o ***Maintenance of a Product Variant -> Price Determination for a Banking Customer Quote.***

CRM_FS_NB_BCQ_1: New Features in Customizing for FS-AO (New for SP03)

Use

As of SAP enhancement package 3 (SP03) for SAP CRM 7.0, business function **CRM-FS, Banking Customer Quote Enhancements** (CRM_FS_NB_BCQ_1), the structure of the SAP Customizing Implementation Guide for *Account Origination (FS-AO)* has been changed. To include these changes in the project IMGs, you have to generate these again.

New Customizing activities for Account Origination

Under *Account Origination -> Banking Customer Quote -> Financial Conditions -> Differentiation Characteristics*:

- **Edit Differentiation Categories**
- **Assign Condition Categories to Differentiation Categories**
- **Define Contract Amount**
- **Define Contract Term**

Under *Account Origination -> Banking Customer Quote -> Payment Advice*:

- **Define Business Process**
- **Define Process Result Type**
- **Define Payment Advice Type**
- **Maintain Settings for Payment Advice**

See also

Release Note **CRM_FS_NB_BCQ_1: CRM-FS, Banking Customer Quote Enhancements (New)**

SAP CRM for Industries: Public Sector

Business Function Social Services, 2013 (SAP CRM)

CRM_IPS_4S_4: Business Function Social Services, 2013

Use

As of SAP enhancement package 3 for SAP CRM 7.0, the business function ***Social Services, 2013*** (CRM_IPS_4S_4) is available.

This business function makes the following available to you:

- **CRM_IPS_4S_4: Decision Basis (New)**
- **CRM_IPS_4S_4: Composite Gross Entitlement Calculation (New)**
- **CRM_IPS_4S_4: Customer Message Handling (Enhanced)**

See also

For more information, see the business function description in the *Switch Framework Business Function Status* transaction or in the SAP Library for SAP CRM on SAP Help Portal at ***<http://help.sap.com> -> SAP Business Suite -> SAP CRM -> SAP EHP3 for SAP CRM 7.0 -> Application Help -> Business Functions (SAP Enhancement Package 3 for SAP CRM 7.0) -> Business Functions for SAP Customer Relationship Management -> Social Services, 2013.***

CRM_IPS_4S_4: Decision Basis (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **Social Services, 2013** (CRM_IPS_4S_4), the new business object **Decision Basis** (BUS2000292) is available.

You can use the decision basis (DBA) to centrally manage data (such as personal data, employer, income, property, sickness-related absences and so on) for the decision-making processes in one central location.

You can configure the DBA data as required for a benefit decision according to a number of available functions:

- **Decision Basis Modeling**
In decision basis modeling, you define the type of data fields and the way in which they are to be structured for the specific benefit decision involved. The creation and generation of DBA data is provided as enhancements to the **Application Enhancement Tool** (AET). DBA data in a model is organized in reusable units called entity types. If entity data is directly related, you can arrange the entity types as an entity type tree based on a **deep table** enhancement.
- **Decision Basis Data Processing**
The decision basis is automatically created in combination with a new social service plan. By default the DBA data is initially loaded from the social application interface. The decision basis provides rule-based data validation in two steps, which customers can define as required at entity data level. In addition to automatic data validation, a caseworker is also authorized to perform manual data validation. Once entity data has been verified, it is activated and transferred from the DBA working version to the associated active version as source for the linked decision-making processes in the social service plan. The **Decision Basis Explorer** provides you a status management at entity level, which is summarized as completeness status at decision sub process level about the applicability of the DBA data.
- **Change of Circumstance**
The Change of Circumstance functionality initiates follow-up processing for existing decisions if active decision basis data is changed.
- **Decision Basis Data Exchange to SAP ERP**
Social Services supports complete DBA data exchange between SAP CRM and SAP ERP. The program **Replication Monitor for Decision Basis Modeling** in SAP ERP ensures the identical replication of DBA models, DBA entity types and the generation of ABAP dictionary objects and table enhancements at design time. During runtime, the CRM middleware exchanges the DBA data.
- **Decision Basis Archiving**
You can archive DBA data using the archiving object CRM_PSDBA. DBA data archiving is performed at decision basis types level. For DBA types you determine the general archiving settings that are supported for CRM transaction types. The archiving of DBA data that is replicated to SAP ERP is performed by the archiving object PSSC_SXP. For more information about Social Services archiving, see the Customizing documentation under **Social Services -> Basic Settings -> Data Archiving in Social Services**.

Effects on System Administration

Basic Conditions for Decision Basis Usage

Our research of customer requirements has identified that typically no more than 50 different social programs are provided by local or global governments. SAP recommends the following when using the decision basis:

- For each kind of social program or benefit program, we assume that one decision basis type is used. Based on this, we assume a scope of maximum **100 decision basis types** for each SAP CRM system.

- For decision basis modeling we assume a maximum number of **200 fields** and a maximum number of **four hierarchy levels** (when you structure your DBA data as **deep table**).

Effects on Customizing

You make the settings for the decision basis in the CRM Customizing settings for Social Services under **Customer Relationship Management -> Industry-Specific Solutions -> Public Sector -> Social Services -> Decision Basis**.

In SAP ERP you make the Customizing settings for the decision basis under **Public Sector Management -> Social Services -> Integration Customer Relationship Management -> Decision Basis**.

The decision basis Customizing consistency check report enables you to check the consistency of your DBA Customizing settings in SAP CRM and SAP ERP. This report is included in the CRM decision basis Customizing activities.

See also

For more information see SAP Help Portal at <http://help.sap.com> -> **SAP Business Suite -> SAP CRM -> SAP EHP3 for SAP CRM 7.0 -> Application Help -> SAP Customer Relationship Management-> SAP CRM for Industries -> Public Sector -> Social Services -> Decision Basis**.

CRM_IPS_4S_4: Composite Gross Entitlement Calculation (new)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **Social Services, 2013** (CRM_IPS_4S_4), you can enable the business object social service plan for a composite calculation with multiple related beneficiaries.

A composite calculation is recommended, when an aggregated calculation of benefits from various beneficiaries (such as husband and wife) is required on the basis of a defined legal dependency. The result is a composite decision in a joint social service plan in which the related beneficiaries are distinguished as decision units with their separate eligibility periods and entitlement amounts. You define the logic for the composite gross entitlement calculation in SAP ERP as a calculation exit strategy.

Determining beneficiaries as decision units can be done manually by the caseworker or automatically using a decision unit determination strategy.

As of this enhancement package the error handling of customer messages is possible for all types of messages. This also applies to the decision unit determination strategy that is defined as customer exit. For more information, see the release note **CRM_IPS_4S_4: Customer Message Handling (Changed)**.

Effects on Existing Data

The adjustments made to existing Social Services functions and business objects for composite calculation have affected the social service plan UI. Accordingly the SSP header data, the eligibility and entitlement data and the decision flow in the CRM WebClient UI is enhanced with the decision unit specific information for SSPs, respectively benefit programs, that are activated for composite calculation.

All customer exits, such as successor processing, eligibility determination, and entitlement determination / calculation now include the composite calculation specific parameters. The integration of composite calculation has no effect on your existing customer-specific implementations.

Effects on Customizing

You make the settings for the composite calculation in the CRM Customizing settings for Social Services under **Customer Relationship Management -> Industry-Specific Solutions -> Public Sector -> Social Services ->**

- **Benefit Program**
- **Decision Unit Determination**

You define the calculation exit strategy for the composite gross entitlement amounts in the SAP ERP Customizing settings under **Public Sector Management -> Social Services -> Gross Entitlement Calculation -> Define Calculation Exit Strategy**.

See also

For more information, see the Social Services application help under **Composite Calculation**.

CRM_IPS_4S_4: Customer Message Handling (Enhanced)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **Social Services, 2013** (CRM_IPS_4S_4), the handling of customer messages has been changed during the processing of customer implementations for the eligibility determination and entitlement determination.

As of this release, you can return several messages from any kind of error type from your BAdI implementation. This means that in addition to error messages, you can also provide information messages or warnings. However, you are now responsible for controlling system response for customer messages. The messages are returned from the BAdI by the new exporting parameter `ET_MESSAGE`.

The message handling for BRFplus has not been changed.

Effects on Existing Data

Changes to your existing BAdI implementation that support error message handling with the ABAP command `MESSAGE ... RAISING error occurred`, are not affected.

Effects on Customizing

The parameter `ET_MESSAGE` has been added to the following Business Add-Ins for your customer exits:

- **BAdI: Define Eligibility Determination**
- **BAdI: Define Item Proposal Strategy for SSP**

Business Function Social Services, 2013 (SAP ERP)

ERP_IPS_4S_4: Business Function Social Services, 2013 (New)

Use

As of SAP enhancement package 7 for SAP ERP 6.0, Industry Extension Public Services (IS-PS-CA 607), the business function ***Social Services, 2013*** (ERP_IPS_4S_4) is available.

This business function makes the following available to you:

- **ERP_IPS_4S_4: Replication Monitor for Decision Basis Modeling (New)**
- **ERP_IPS_4S_4: Entitlement Calculation Exit (Enhanced)**
- **ERP_IPS_4S_4: Decision Basis Data Archiving (New)**

See also

For more information, see the business function description in the ***Switch Framework Business Function Status*** transaction or in the SAP Library for SAP ERP on SAP Help Portal at <http://help.sap.com> -> ***SAP Business Suite*** -> ***SAP ERP*** -> ***SAP ERP Enhancement Packages*** -> ***ERP Central Component Enhancement Package 7*** -> ***Business Functions*** -> ***Business Functions in SAP ERP*** -> ***Industry Business Function Sets*** -> ***Public Services*** -> ***Social Services, 2013***.

ERP_IPS_4S_4: Replication Monitor for Decision Basis Modeling (New)

Use

As of SAP enhancement package 7 for SAP ERP 6.0, Industry Extension Public Services (IS-PS-CA 607), business function **Social Services, 2013** (ERP_IPS_4S_4), you can replicate your decision basis modeling data from SAP CRM to SAP ERP.

The replication monitor for decision basis modeling (program RPSSC00_DBA_REPL_MONITOR) includes the following features:

- Identical replication of your decision basis modeling (DBA) data, which you originally created in SAP CRM. This covers the replication of DBA models and entity types and the generation of ABAP dictionary objects for the data fields.
- Overview of DBA modeling data in SAP CRM and the replication and generation status of this data in SAP ERP.
- The replicated and generated DBA modeling data is stored in Customizing and workbench requests for the transport to follow-on ERP systems.

Effects on Customizing

The decision basis replication monitor is available in the Social Services Customizing settings under **Public Sector Management -> Social Services -> Integration Customer Relationship Management -> Decision Basis -> Replicate Decision Basis Modeling**.

See also

For more information, see the **program documentation**.

For more information about the general usage of the decision basis, see SAP Library for Social Services on SAP Help Portal at <http://help.sap.com> -> **SAP Business Suite -> SAP CRM -> SAP EHP3 for SAP CRM 7.0 -> Application Help -> SAP CRM for Industries -> Public Sector -> Social Services -> Decision Basis**.

ERP_IPS_4S_4: Entitlement Calculation Exit (Enhanced)

Use

As of SAP enhancement package 7 for SAP ERP 6.0, Industry Extension Public Services (IS-PS-CA 607), business function **Social Services, 2013** (ERP_IPS_4S_4), the entitlement calculation exit is enhanced to support the following new Social Services functionalities:

- **Composite Calculation**

You can consider **decision units** in your entitlement calculation exit strategies. The parameter `IS_SXP_DATA` of method `CALCULATE_GROSS_ENTITLEMENT` is enhanced accordingly.

- **Decision Basis**

The class `CL_PSSC00_DBA_API` contains methods that you can use to integrate your decision basis data with your BAdI-based or BRFplus-based customer exits for the entitlement calculation (see **class documentation**).

Effects on Customizing

You make the Customizing settings for the entitlement calculation in Customizing for Public Sector Management under **Social Services -> Gross Entitlement Calculation -> Define Calculation Exit Strategy** using a BAdI implementation or a BRFplus rule.

ERP_IPS_4S_4: Decision Basis Data Archiving (New)

Use

As of SAP enhancement package 7 for SAP ERP 6.0, Industry Extension Public Services (IS-PS-CA 607), business function **Social Services, 2013** (ERP_IPS_4S_3), you can archive decision basis (DBA) data in SAP ERP. The archiving of DBA data is provided by the existing archiving object PSSC_SXP.

The archiving of decision basis data supports both Social Services archiving scenarios. If you are using the archiving scenario that is controlled by SAP CRM, no specific settings need to be made in SAP ERP. DBA data archiving is supported by the SAP CRM archiving object CRM_PSDBA. This scenario is recommended by SAP.

If you are using the separate Social Services data archiving scenario, you have to make the ERP-specific DBA archiving Customizing settings and use the archiving programs for the archiving object PSSC_SXP.

Effects on Customizing

Make the Customizing settings for the separate Social Services DBA archiving scenario in SAP ERP under **Public Sector Management -> Social Services -> Basic Setting -> Archiving**:

- **Define Decision Basis Types for Archiving**
- **Define Residence Time for Decision Basis Types**

See also

For more information see SAP Library for Social Services on SAP Help Portal at <http://help.sap.com> -> **SAP Business Suite -> SAP CRM -> SAP EHP3 for SAP CRM 7.0 -> Application Help -> SAP CRM for Industries -> Public Sector -> Social Services -> Data Archiving in Social Services**.

SAP CRM for Industries: Utilities

Business Function Utilities Energy Management

CRM_UT_ER_3: Business Function Utilities Energy Management (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, the business function **Utilities Energy Management** (CRM_UT_ER_3) is available. This business function provides you with a number of enhancements to the existing functions in the Interaction Center for Utilities:

- **Product Modeling for Utilities**

Regarding the utilities product modeling process - especially in the deregulated energy market with more and more complex products coming up - there was the requirement of the possibility to model products using special criteria and to preconfigure products.

The need for a more complex product modeling environment and a product modeling process that allows to flexibly react to market requirements has now been fulfilled with the new *Product Modeling for Utilities*.

For more information, see the **Product Modeling for Utilities** release note.

- **Product Finder and Configurator**

With the *Product Finder and Configurator (PFC)*, a dynamic and easy-to-adopt user interface for the call center agent is available.

For more information, see the **Product Finder and Configurator** release note.

- **New Product Search**

The existing input help for product search using the set type CRM_ISU_PROD has been replaced with a new utilities product search. You can now search using utilities configuration attributes and the product role.

In the UTIL_SALES business role, the new product search now is the default search in all respective applications. In the UTIL_IC business role, however, the PFC replaces the product search in all applications.

- **New Product Configuration View**

The existing table-based configuration view has been replaced by a new configuration form, which allows for new features, for example, tooltips, graphical icons and various render types like radio button groups, tabs and links.

- **Price Object**

For the price determination process, it is no longer necessary to work in the backend system. You can make use of the new **price object** function.

For more information, see the **Price Object** release note.

- **Premise Overview**

The *Premise Overview* offers you a quick overview of the data environment of a confirmed premise, and the details of related objects. The new data environment is premise-centric, and is therefore not restricted to the current business partner living at the premise, or to the

currently confirmed business partner.

For more information, see the **Premise Overview** release note.

- **Meter Reading Enhancements**

In the *Meter Reading* work center, you can do the following:

- See and maintain unbilled meter reading data
- Estimate and validate meter reading results
- Release implausible meter readings
- View historical meter reading data

Enhanced meter reading reasons are available when entering meter reading results for move-in and move-out during the contract management process. Also, a temporary table is available for the storage of meter reading data during contract replication. A clean-up report is also provided for removing unused meter reading data from the temporary table.

You can view historical meter reading data in the *Premise Overview* when you select a POD or a contract in the *Premise Overview* tree. The ISU_MR_HISTORY_QUERY BAdI allows you to limit the selection criteria for the retrieval of historical meter reading data that is displayed in the *Premise Overview*.

For more information, see the **Meter Reading** release note.

- **Clarification Cases**

You can view open clarification cases in the *Premise Overview* tree and in the *Business Data Environment* tree (located in the *Account Overview* work center). You can also create clarification cases using several different views in the Interaction Center. Tables containing historical clarification cases for the confirmed business partner are available in the *Interaction Record* work center and the *Account Overview*.

The CRMVC_EMMA Customizing activity allows you to define the clarification case categories to be used when creating a clarification case. The BAdI CRM_ISU_BPPEM_MAINOBJKEY allows you to define the main objects used when creating a clarification case. Another BAdI BADI_BP_BPPEM_QUERY allows you to specify the maximum number of historical clarification cases to be displayed in the *Account Overview* and *Interaction Record* work center.

For more information, see the **Clarification Cases** release note.

- **SAP Data Quality Management Software Integration**

SAP Data Quality Management software has been integrated with account identification and contract management in the Interaction Center. When you create or change an account, the software validates address data and checks for potential duplicates of business partners. It also ensures that you enter correct mailing and shipping addresses when starting or ending a contract, as well as when customers move to a new service location.

Note: The Data Quality Management integration is only available for the languages which are supported by DQM.

For more information, see the **Account Search and Maintenance (Enhanced)** release note.

- **Alerts Enhancements**

The system displays alerts to notify interaction center agents about items or situations that require immediate attention. Interaction Center (IC) managers or system administrators can create predefined alerts to be triggered by certain events in the system. SAP delivers sample alerts to help you in creating your own custom alerts.

For more information, see the Best Practices Guide for *Setting Up a Best-Run Interaction Center* in the **SAP Service Marketplace** and the **Account Search and Maintenance (Enhanced)** release note.

- **Automatic owner move-in**

The existing automatic owner move-in workflow has been enhanced to consider an integrated scenario (IS-U ECC and CRM). This workflow facilitates the automatic move-in of an owner into a vacant installation.

For more information, see the **Workflow for Automatic Owner Move-In** release note on the SAP Help Portal at <http://help.sap.com/utilities>, under *SAP Utilities as Part of SAP ERP 6.0 EHP 7*.

- **North American Address Configuration**

A new view configuration is available, allowing the system to display a North American address format in the Interaction Center.

For more information, see the **Account Search and Maintenance (Enhanced)** release note.

- **Country-Specific Format for Addresses**

The one-line addresses that are displayed for connection objects, premises, points-of-delivery and business partners in the Interaction Center (for example, in the business or technical data environment trees in the *Account Overview*) now use a country-specific format based on the location of the object. The exact format of the address depends on the country's postal guidelines.

CRM_UT_ER_3: Product Modeling for Utilities (New)

Use

As of SAP CRM 7.0 enhancement package 3, business function **Utilities Energy Management** (CRM_UT_ER_3), the new *Product Modeling for Utilities* (PMU) tool is available. It is a new modeling environment for utility products and packages in the user role *Utilities Sales for Key Account Management*.

The use of controlled templates, reference products and product modules has greatly streamlined and accelerated product modeling. Versioning has improved the overview of existing objects, which can be modeled with access to historical and current market data. You can perform product tests immediately after modeling without all data having to be available in the connected systems. The time required to model a product has been significantly reduced by the import and export options available. A tested product can be imported to the production system quickly, therefore avoiding the need to create it again in this system.

Unlike the modeling of standard CRM products using an interface with a tree structure, PMU uses a new UI concept that displays typical utilities data in a compact format. The logical structure of the new graphical interface provides a clear overview of relationships and hierarchies for products.

The overview is further enhanced by positioning all modeling-relevant functions on an overview page and by combining attributes and components using display groups.

With PMU, we provide a generic solution that customers can adapt to their needs with regard to their own product modeling processes. The complexity of this adaptation is hidden and supported by BRFplus rules, this means no specific programming knowledge is required for the adaptation.

CRM_UT_ER_3: Product Finder and Configurator (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **Utilities Energy Management** (CRM_UT_ER_3), the *Product Finder and Configurator* (PFC) is available.

It is a flexible tool used to search for, select, and configure product packages, individual products, and materials. This process is performed before and independently of the sales process. However, the determined packages, products, and materials can then be transferred and used for the sales process.

The search and filter criteria are determined using the product definition object and its hierarchy.

See also

For more information, see the *Product Finder and Configurator* documentation on SAP Help Portal under <http://help.sap.com> -> *SAP for Industries* -> *SAP for Utilities* -> *SAP for Utilities as Part of SAP CRM* -> *SAP for Utilities as Part of SAP Enhancement Package 3 for SAP CRM 7.0* -> *SAP Library* -> *SAP CRM for Industries* -> *Utilities* -> *Functions for the Utilities Industry* -> *Functions for the Interaction Center (Utilities Industry)*-> *Utility Quotations and Utility Contracts* -> *Product Finder and Configurator*.

CRM_UT_ER_3: Price Object (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **Utilities Energy Management** (CRM_UT_ER_3), the **Price Object** function is available.

The price object is an open price interface and can be connected to different price sources, for example, spreadsheet applications, BRFplus rules, competitor products or backend system simulations. It is used in the Product Finder and Configurator (PFC) to define and consolidate the price determination and visualization of different price sources in an identical way. The price source can be defined/determined for each product.

The results of the price determination are returned as price components and can then be stored at order item level.

As is now standard practice in this new utilities solution, BRFplus functions are used for this price object (with usage "**Price Determination**").

For the billing simulation in the IS-U back-end system, the pricing process is now controlled from the SAP CRM system using a master data template and configuration data.

It is not necessary to work in the back-end system as it was the case for the simulation workbench in the SAP ERP system.

Using the price object gives you the following options:

- You can add your own price sources.
- You can define your own price components.
- You can display any price components on the user interface.
- You can use a detailed view for price components.
- You can compare products easily.

CRM_UT_ER_3: Premise Overview (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **Utilities Energy Management** (CRM_UT_ER_3), the *Premise Overview* feature is available in the Interaction Center.

New Premise-Centric View

Interaction center agents can use the newly designed *Premise Overview* (based on the former *Service Location Workbench* environment) to get a quick overview of the data environment of a premise, including:

- Open (current) and historical installation information
- Open and historical clarification cases
- Open and historical service orders
- Open and historical service notifications
- Open and historical contracts
- Open and historical disconnections
- Customer consumption information
- Open items (for Business Agreements) and invoices
- Meter readings
- Bank details
- Owner allocation information
- Business Partner details
- Graphical overview of premise activities
- Interaction center agent notes related to a premise
- Unpaid balances
- **Equipment**

Note: The business objects that are displayed in the premise overview tree vary depending on whether you are assigned to a regulated or deregulated business role.

Navigation

This new data environment is premise-centric, that is, the information contained in this view is not restricted to the current business partner living at the premise or to the currently confirmed business partner.

There are three ways to navigate to the *Premise Overview*:

- By selecting the *Premise Overview* link from the navigation bar menu

Note: To use this option, you must first confirm a premise.

- On the *Identification* page, by selecting a premise in the *Results List* and choosing the *More Fields* pushbutton
- On the *Identification page*, by using the one-click display and change actions for premise, connection object and point of delivery in the *Results List*

The *Premise Overview* is split into a tree structure on the left side of the screen and a detail view area on the right side. The tree structure allows you to select a single object at a time; this in turn updates the detail view area with relevant information about this object.

The following objects are available in the tree:

- Connection Objects (root)
- Device Locations
- Devices
- Premises
- Points of Delivery
- Contracts
- Business Agreements
- Business Partners
- Service Orders
- Service Notifications
- Disconnection Documents
- Clarification Cases
-

Premise Activity Graph

The premise activity graph in the details area visually presents premise-related activities and documents on a timescale. The graph appears when you select a premise on the premise overview tree. Hovering over the various icons in the graph allows you to see tooltips containing the most salient details related to the object, including open and due amounts. Objects related to all contracts for the selected premise are displayed.

Consumption Graph

When selecting a POD in the premise overview tree, the consumption graph displays the billed consumption data for the active contract only. Clicking the *View All* pushbutton refreshes the graph and displays the consumption history for the period of time as specified in the Customizing.

One-Click Actions

When you click on an icon in the premise overview tree, a drop-down menu of possible actions is displayed for the object in question. For example, when clicking on the *Premise* icon, a menu of possible actions appears:

- *Confirm Premise* (if the premise has not yet been confirmed)
- *Unconfirm Premise* (if the premise is already confirmed)
- *Display Premise*
- *Create Service Order*
- *Create Service Notification*
- *Create Clarification Case*

Effects on Customizing

The *Premise Overview* is a complex application and therefore requires extensive Customizing. For more information, see the documentation in Customizing for *Customer Relationship Management* under *Industry-Specific Solutions-> Utilities Industry-> Settings for User Interfaces-> Premise Overview*.

For more information on the BOL tree, see the documentation in Customizing for *Customer Relationship Management* under *Industry-Specific Solutions-> Utilities Industry-> Settings for User Interfaces-> Settings for Object Workbench-> Define Object Hierarchy and Object Attributes*.

Performance Recommendations

Reducing the number of rows displayed in the premise overview tree may improve performance. You can change the number of rows displayed by using the Customizing for *Customer Relationship Management* under *Industry-Specific Solutions-> Utilities Industry-> Settings for User Interfaces-> Settings for Object Workbench-> Define Object Hierarchy and Object Attributes*.

You can specify the number of rows per page under each individual tree profile. The default number of rows per page is 20.

Premise Object Customizing

The BAdI *Premise Overview: BAdI for Premise Objects* allows you to influence the selection criteria for the objects displayed in the premise overview tree. These objects include clarification cases, service orders, service notifications and disconnection documents.

You can make the settings for the premise object query in the Customizing for *SAP Utilities* under *Customer Service-> CRM Integration-> BAdIs for Accessing Objects-> Premise Overview: BAdI for Premise Objects*.

Consumption Graph Customizing

The *Settings for Consumption Graph* customizing activity allows you to determine the number of months or billing cycles for billed consumption to be displayed in the consumption graph.

You can make the settings for the consumption graph in the Customizing for *Customer Relationship Management* under *Industry-Specific Solutions-> Utilities Industry-> Settings for User Interfaces-> Premise Overview-> Settings for Consumption Graph*.

Note: The minimum version of Adobe Flash Player required to display the consumption graph is version 10.

Consumption Table Customizing

The BAdI *Premise Overview: BAdI for Consumption Table and Graph* allows you to influence the number of billing periods for which consumption data is displayed in the billed consumption table.

You can make the settings for the consumption table in the Customizing for *SAP Utilities* under *Customer Service-> CRM Integration-> BAdIs for Accessing Objects-> Premise Overview: BAdI for Consumption Table and Graph*.

Premise Activity Graph Customizing

The BAdI *Enhance Premise Activity Graph* allows further customization of the activity graph. Using this BAdI, you can change the time period displayed by the graph and determine which objects are shown in the graph. You can also determine the information that is shown in the tooltip as well as the icons that you would like to use to represent various objects.

You make the Customizing settings for this feature in the Customizing for *Customer Relationship Management* under *Industry-Specific Solutions-> Utilities Industry-> Settings for User Interfaces-> Premise Overview-> BAdI: Enhance Premise Activity Graph*.

Note: The minimum version of Adobe Flash Player required to display the Premise Activity Graph is version 10.

See also

For more information, see SAP Library for Customer Relationship Management on SAP Help Portal at <http://help.sap.com/utilities-crm703>. In SAP Library, choose *Application Help-> SAP CRM for Industries-> Utilities-> Functions for the Utilities Industry-> Functions for the Interaction*

Center (Utilities Industry)-> Account-> Premise Overview in the Interaction Center.

For an overview of all new functionality delivered with the CRM_UT_ER_3: Business Function Utilities Energy Management, see the release note for **CRM_UT_ER_3: Business Function Utilities Energy Management**.

CRM_UT_ER_3: Meter Reading (Changed)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **Utilities Energy Management** (CRM_UT_ER_3), the meter reading feature in the Interaction Center has been enhanced for the business roles UTIL_IC and UTIL_IC_REG.

Meter Reading in Premise Overview

You can see meter reading data for a selected POD, contract or business agreement in the *Premise Overview*.

Note: Select *Premise Overview* from the navigation menu on the left hand side. For more information, see the release notes for **Premise Overview**.

- View Historical Meter Reading Data for a Selected POD or Contract
You can view historical meter reading data by selecting a POD or a contract in the *Premise Overview* tree. The meter reading history for the selected object will be displayed in an assignment block on the right hand side. This historical data includes meter reading orders. You can influence the time period for which meter reading history is displayed with the delivered BAdI implementation.
- View Meter Reading Information for Business Agreement
When you select a business agreement in the *Premise Overview* tree, a table with all related invoices is displayed on the right hand side.
Additional fields related to meter reading are available for the *Invoices* table:
 - Old Meter Reading
 - New Meter Reading
 - Meter Reading Type
 - Internal ID of Meter Reading Document
 - Meter Reading Reason
 - Reason for Previous Meter Reading

Meter Reading Work Center

You can see historical meter reading data (including meter reading orders) for a confirmed premise or business partner, as well as unbilled and billed meter reading results in the *Meter Reading* work center. Agents can filter meter reading data by date and status.

Note: Select *Billing-> Meter Reading for Premise* or *Billing-> Meter Reading for BP* in the navigation menu on the left hand side after confirming a premise or a business partner.

You can also do the following in the *Meter Reading* work center:

- Enter new meter readings
- Change existing unbilled results
- View meter reading validation results
- Release implausible meter readings
- View Historical Meter Reading Data
You can choose to display only unbilled meter readings, billed meter readings, or meter reading orders in the *Historical Meter Reading Data* table. You can also restrict the period (date from and date to) of meter reading history.
- Enter Meter Readings
You can enter new meter readings for a confirmed account, a confirmed premise, or a device.
Only meter readings with the following meter reading reasons can be entered:

- 01: Periodic
- 09: Interim Without Billing

Meter reading data entered through this workcenter are generated with the meter reading reason Interim without Billing (code 09). However, in the ERP system, you can change the Customizing to generate the meter reading as a Periodic Meter Reading (code 01). These settings are located in the Customizing for SAP Utilities under *Device Management -> Meter Reading -> Basic Settings-> Define Control Parameters for Meter Reading Data Processing*.

- **Change Existing Unbilled Meter Readings**
You can change existing, unbilled meter readings.
Only meter readings with the following meter reading reasons can be changed:
 - 01: Periodic
 - 02: Interim With Billing
 - 09: Interim Without Billing
- **Estimate Meter Reading Results**
You can estimate meter reading results in the *Meter Reading* work center. You can generate estimations for one or several devices or registers at the same time.
- **Validate Meter Reading Results**
You can validate meter reading results in the *Meter Reading* work center. When you choose the "Validate" action icon in the *Meter Reading Data* table, the system displays the validation results for the selected meter reading. The status of the meter reading validation is indicated using a traffic light icon. See the related application help for more information.
- **Release without Correction**
You can release implausible meter readings using the *Release Without Correction* pushbutton. This activity can be performed for more than one device or register at the same time.

Meter Reading Reasons

In the past, the meter reading reason 09 (Interim Without Billing) was used regardless of whether the meter reading was for a move-in or a move-out.

However, you can now create meter readings with the following meter reading reasons in the corresponding contract management processes:

06: Meter Reading at Move-In

03: Meter Reading at Move-Out

Effects on Customizing

Premise Overview: BAdI for Meter Reading History

You can use this Business Add-In (BAdI) to limit the selection criteria for the retrieval of historical meter reading data that is displayed in the *Premise Overview*.

For more information, see the documentation in the Customizing for *SAP Utilities* under *Customer Service-> CRM Integration-> BAdIs for Accessing Objects-> Premise Overview: BAdI for Meter Reading History*.

Define Control Parameters for Meter Reading Data Processing

In the corresponding ERP system, you can use this customizing to influence the creation of meter reading data with the desired meter reading reason (periodic or interim without billing).

For more information, see the documentation in the Customizing for *SAP Utilities* under *Device Management -> Meter Reading -> Basic Settings-> Define Control Parameters for Meter*

Reading Data Processing.

See also

For more information, see SAP Library for Customer Relationship Management on SAP Help Portal at <http://help.sap.com/utilities-crm703> under *Application Help-> SAP CRM for Industries-> Utilities-> Functions for the Utilities Industry-> Functions for the Interaction Center (Utilities Industry)-> Billing.*

For an overview of all new functionality delivered with the CRM_UT_ER_3: Business Function Utilities Energy Management, see the release note for **Business Function Utilities Energy Management**.

CRM_UT_ER_3: Clarification Cases (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **Utilities Energy Management** (CRM_UT_ER_3), the clarification case feature is available in the Interaction Center.

Note: To use the clarification case functionality in the *Interaction Record* work center, the business role must use function profile INR_BPEMCASE (delivered by default).

View Open Clarification Cases

Clarification cases are displayed in the *Premise Overview* when the main object is the confirmed premise or any installation, contract, business agreement or device that is related to the current premise.

Clarification cases are displayed in the *Account Overview* when the main object is the confirmed business partner or any premise, installation, contract or business agreement that is related to the current business partner.

Premise Overview

When you select the *Clarification Cases* folder in the *Premise Overview* tree, all open clarification cases for the current premise are displayed in the *Clarification Cases* table on the right-hand side. Clarification cases that are in status "New" or "In Process" are considered to be "open".

When you select a clarification case from within this table, the details of the case are displayed below it. You can click on the unique ID of an individual case to navigate to the details view.

Note: Only the clarification case notes are editable in the details view.

Alternatively, you can expand the folder in the *Premise Overview* tree and select a single clarification case; the details of the case will be displayed on the right-hand side.

Account Overview

A folder containing all open clarification cases is also available in the *Account Overview* work center (in the *Business Data Environment* tree). Clicking the unique ID of an individual case allows you to navigate to the details view where you can edit the notes of the case.

View Past Clarification Cases

Historical clarification cases for the confirmed business partner are displayed in the *Interaction Record*, *Premise Overview*, and *Account Overview* work centers.

Interaction Record Work Center

In the *Clarification Cases History* table, you can navigate to each clarification case in display mode by clicking the case ID link. In the case detail view, you can also click *Edit* to switch from display mode to editing mode; only the notes belonging to a clarification case can be edited. Alternately, you can also navigate to the clarification case in edit mode by clicking the Edit icon in the *Action* column.

Note: Only clarification cases in status "New" and "In Process" can be edited.

Premise Overview

You can click the *View All* pushbutton on the *Clarification Cases* table header to display past clarification cases as well as current ones, including those in status "Completed", "Confirmed" and "Canceled". You can also select an individual clarification case to display the details of the case below the table. Clicking the unique ID of an individual case allows you to navigate to the full screen details view where you can edit the notes of the case.

Note: Only clarification cases in status "New" and "In Process" can be edited.

Account Overview

You can click the *Clarification Cases* tab in the *Account Overview* work center to display past clarification cases as well as current ones. Clarification cases that are relevant to the confirmed business partner and related objects are displayed.

In the *Clarification Cases* table, you can navigate to each clarification case in display mode by clicking the case ID link. Alternately, you can navigate to the clarification case in edit mode by clicking the Edit icon in the *Action* column; only the notes belonging to a clarification case can be edited. In the case detail view, you can also click the *Edit* pushbutton to switch from display to editing mode.

Note: Only clarification cases in status "New" and "In Process" can be edited.

Create Clarification Cases

There are three ways to create clarification cases:

- In the *Interaction Record* work center
You can create clarification cases by clicking the *Clarification Case* tab in the *Follow Up* section. You must select a case category and priority level for each new case. When you select a case category, the *Main Object* and *Key* field are automatically filled. There is no actual connection between the interaction record and the creation of clarification cases, so it is possible for you to create one or more clarification cases regardless of the interaction record process. The information that you provide in the Interaction Center is sent to the ERP system for the actual case creation and storage.
- From the *Premise Overview* tree or the *Account Overview* (in the *Business Data Environment* tree)
You can click on the Premise, Business Agreement, POD, Contract and Business Partner object icons and use the one click menu action *Create Clarification Case*, which allows you to navigate to the *Interaction Record* work center. On this page, the *Main Object/Key* and *Case Category* fields are prefilled with values that correspond to the selected object.
- By clicking on the *New* pushbutton from the *Clarification Cases History* table in the *Interaction Record* work center or the *Clarification Cases* table on the *Account Overview* page

Effects on Customizing

Maintain Parameters for Clarification Case Creation

In this activity, you define the clarification case categories that are to be available during the creation of new clarification cases, along with any other data required for the creation of a new clarification case.

You can maintain the parameters for clarification case creation in the Customizing for *Customer Relationship Management* under *Industry-Specific Solutions-> Utilities Industry-> Settings for User Interfaces-> Clarification Cases-> Maintain Parameters for Clarification Case Creation*.

BAdI for Main Object/Key List

This BAdI allows you to tailor the behavior of the Clarification Case functionality in the *Interaction Record* work center. The method GET_MAIN_OBJECT_KEYS allows the *Main Object /Key* drop down list to be populated with the desired keys during the creation of a clarification case.

For more information, see the documentation in the Customizing for *Customer Relationship Management* under *Industry-Specific Solutions-> Utilities Industry-> Settings for User Interfaces-> Clarification Cases-> BAdI for Main Object/Key Determination*.

BAdI for Displaying Clarification Cases

You can use this BAdI to limit the selection criteria for the clarification cases displayed in the

Account Overview work center and the *Interaction Record* work center.

You can specify the maximum number of clarification cases to be displayed in the Customizing for *SAP Utilities* under *Customer Service-> CRM Integration-> BADIs for Accessing Objects-> Account Overview: BAdI for Clarification Cases*.

See also

For more information, see SAP Library for Customer Relationship Management on SAP Help Portal at <http://help.sap.com/utilities-crm703>. In SAP Library, choose *Application Help-> SAP CRM for Industries-> Utilities-> Functions for the Utilities Industry-> Functions for the Interaction Center (Utilities Industry)-> Clarification Cases*.

For an overview of all new functionality delivered with the CRM_UT_ER_3: Business Function Utilities Energy Management, see the release note for **Business Function Utilities Energy Management**.

CRM_UT_ER_3: Account Search and Maintenance (Enhanced)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **Utilities Energy Management** (CRM_UT_ER_3) is available. With this business function, you can use the following improvements to the account search and maintenance function:

- **Address format following North American standards**

The North American address view configuration has been added to the already existing European configuration. The interaction center agent can use this for entering address and other details including title, middle name, date of birth, social security number, driver's license number, region, main contact person, and so on.

The system determines which configuration to use based on the value set for the ADDRESS_SCREEN parameter in the user's profile. In the **SAP Easy Access Menu under System -> User Profile -> Own Data**, you can enter the ADDRESS_SCREEN parameter and enter country code 004 or 005 for the North American address format. If no value is set for the parameter, the European address format (country code 001) is used by default.

- **Fields copied over from search to creation view**

When an interaction center agent searches for an account by entering certain search criteria, and the search is unsuccessful, the system copies over information to the account creation screen. A new Business Add-In (BAI) method COPY_BP_ADDRESS has been added to **BAI: Identification and Master Data** in Customizing for **Customer Relationship Management under Industry-Specific Solutions -> Utilities Industry -> Settings for User Interfaces -> Identification**. This BAI method determines the fields to be copied over to the account creation screen by the system.

- **Tax identification number**

An interaction center agent maintains a tax identification number when creating or modifying an organization. The tax category field to be used can be maintained in the Customizing for identification profile.

For more information, see section *Effects on Customizing*.

- **Related account**

An interaction center agent assigns a related account (for example, contact person) to an account. The interaction center agent can now do the following for related accounts:

- Search for an existing account
- Create a new account if the contact person does not already exist in the system
- Select a relationship category:
 - If relationship category is **Contact Person for**, the agent can specify the validity period of the relationship.
 - If relationship category is a **Payee, Alternative Payer, Bill-To Party, Dunning Recipient** or **Correspondence Recipient**, the relationship is stored in the business agreement and the agent is able to select the business agreement in which to update this information. Otherwise, the agent can specify the type of the relationship.
- Confirm the relationship between the business partner and the contact person
- See related accounts in the business data environment tree, either under the main account or under the corresponding business agreement:
 - Display or change details of an existing relationship for an account
 - Display the account overview for a related account
 - Delete a relationship

- **SAP Data Quality Management software integration**

The SAP Data Quality Management integration validates and completes the address as entered by the agent and can correct address errors.

It also checks for duplicate records for business partners and gives the agent the option to select the correct one from a list of similar business partners before saving a new one.

Note: The Data Quality Management integration is only available for the languages which are supported by DQM.

- **Sample alerts**

A sample alert is delivered to enable the system administrator or interaction center manager to create predefined alerts and notifications that are displayed to interaction center agents. Certain status changes, for example, a disconnection, trigger an alert which notifies the interaction center agent of situations that might require immediate attention.

Effects on Customizing

A new view cluster has been created in Customizing for **Customer Relationship Management** under **Industry Specific Solutions-> Utilities Industry -> Settings for User Interfaces -> Identification -> Define Identification Profiles**. It includes the existing Customizing activity, together with new Customizing controls to support the features mentioned above, including tax number category, identification type, related accounts and so on.

See also

For more information, see SAP Library for Customer Relationship Management on SAP Help Portal at <http://help.sap.com/utilities-crm703>. In SAP Library, choose *Application Help-> SAP CRM for Industries-> Utilities-> Functions for the Utilities Industry-> Functions for the Interaction Center (Utilities Industry)-> Account*.

For an overview of all new functionality delivered with the CRM_UT_ER_3: Business Function Utilities Energy Management, see the release note for **CRM_UT_ER_3: Business Function Utilities Energy Management**.

Business Function SAP Energy Demand-Side Management

CRM_UT_DSM_2: Business Function SAP Energy Demand-Side Management (New)

Use

As of enhancement package 3 for SAP CRM 7.0, the business function **SAP Energy Demand-Side Management for Utilities** (CRM_UT_DSM_2) is available. With this business function, you can create and manage demand-side management (DSM) programs, applications and agreements and you can carry out the following new functions:

- **Streamlined business processes**
 - Use equipment-related functions for both UTIL_IC_REG and UTIL_DSM_MGR business roles
 - Define premise for each measure in application and agreement
 - Use enhanced search for applications and agreements for considering premise at the measure level
 - Use enhanced eligibility check on measure item and equipment item
- **Improved usability of the demand-side management solution**
Easily run eligibility checks on applications, agreements and equipment
- **Use of business analytics**
 - Extract measure configuration information into SAP NetWeaver Business Warehouse
 - Extract information related to equipment into SAP NetWeaver Business Warehouse
 - Extract information related to premise and business agreement at measure level into SAP NetWeaver Business Warehouse

Roles

The Interaction Center (UTIL_IC_REG) role is available in SAP CRM to allow you to perform the functions related to the interaction center.

Effects on System Administration

To implement the enhanced SAP Energy Demand-Side Management for Utilities business function, you must make the settings as specified in SAP Solution Manager. In the business process repository, select **Solutions/Applications -> SAP for Utilities -> Scenarios -> Demand Side Management**.

Effects on Customizing

To implement SAP Energy Demand Side Management, you must make settings in Customizing for **SAP Customer Relationship Management** under the following navigation paths:

- **Industry-Specific Solutions -> Utilities Industry -> Demand Side Management -> Equipment Management -> Maintain Predefined Searches for Equipment**: Used to maintain predefined searches and validate equipment
- **Industry-Specific Solutions -> Utilities Industry -> Demand Side Management -> Equipment Management -> Business Add-Ins (BAdIs) -> BAdI: Define Predefined Searches and Validate Equipment**: Used to define predefined searches and validate equipment
- **Industry-Specific Solutions -> Utilities Industry -> Demand Side Management -> Equipment Management -> Business Add-Ins (BAdIs) -> BAdI: Validation Check for Equipment Assignment**: Used to validate equipment assignment
- **Industry-Specific Solutions -> Utilities Industry -> Demand Side Management -> Basic**

Functions -> Eligibility Check -> Business Add-Ins (BAIs) -> BAI: Processing Methods: Used to create Business Add-in implementations for processing methods

- **Industry-Specific Solutions -> Utilities Industry -> Demand Side Management -> Basic Functions -> Eligibility Check -> Business Add-Ins (BAIs) -> BAI: Context Filler for BRFplus Functions in DSM:** Used to retrieve and send data for specific BRFplus function

See also

For more information, see the following release notes:

- **Eligibility Check (Enhanced)**
- **Equipment in Premise Overview**

CRM_UT_DSM_2: Eligibility Check (Enhanced)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **SAP Energy Demand-Side Management for Utilities** (CRM_UT_DSM_2), the eligibility check function has been enhanced.

The eligibility check for applications and agreements now includes the following additional features:

- Ability to provide reasons for the ineligibility of an application or agreement
- Ability to run an eligibility check at measure level
- Ability to change the status for both header and measure levels based on the result of the eligibility check
- Ability to run an eligibility check on applications and agreements with a pushbutton
- Ability to manually change the statuses of an application, an agreement or a measure, which automatically triggers an eligibility check
- Ability to run an eligibility check based on equipment information

Effects on Customizing

You make the following Customizing settings for this function in **SAP Customer Relationship Management** under **Industry Specific Solutions-> Utilities Industry -> Demand Side Management -> Basic Functions -> Eligibility Check -> Business Add-Ins (BAIs)**:

- BAi: Processing Methods
- BAi: Context Filler for BRFplus Functions in DSM

Business Function Product Transport for Utilities

CRM_UT_PROD_TRANS: Business Function Product Transport for Utilities (New for SP03)

Use

As of SAP enhancement package 3 (SP03) for SAP CRM 7.0, the business function **Product Transport for Utilities** (CRM_UT_PROD_TRANS) is available.

The product transport is used to transfer utilities-specific products to various systems.

The product transport covers all utilities-specific product roles with their associated data. This data is as follows:

- Product header data
- Product short and long texts
- Assigned simplified configuration attributes
- Attribute groups
- Components
- Information about set types
- Assigned BRFplus functions
- IPC knowledge bases

Assigned products will not be transported automatically but they have to be transported in advance.

You can only transport the last version of a product that has been released or activated for testing. This is managed using version and status management.

The system performs **various checks** before the product transport takes place, such as:

- Authorization checks
- Check the availability of the simplified configuration attributes in the target system
- Check the availability of all types of groups in the target system
- Check the availability of the product base category in the target system
- Check the status of the product version
- Check whether the product version already exists in the target system

In addition to the product transport, which directly saves a product version in the target system, this business function can also be used to simulate a product transport. The simulation uses the same data and performs the same checks but does not save the product version.

Following the product transport, the system displays a **transport log**. This can be an error, warning or success log.

Older versions of utilities products, utilities packages, product determination objects and BRFplus functions cannot be transported.

Transports cannot run in parallel.

Enhancements have been made to the BRFplus editor. For more information, see SAP Help Portal at <http://help.sap.com> under **SAP Business Suite -> SAP Customer Relationship Management -> SAP Enhancement Package 3 for CRM 7.0 (SP03) -> SAP CRM for Industries -> Utilities Industry -> Functions for the Utilities Industry -> Product Modeling for Utilities -> Activities -> Working with the BRFplus Editor**.

Effects on Customizing

You make the settings required for the product transport in Customizing for **Customer Relationship Management** under **Industry-Specific Solutions -> SAP Utilities -> Product -> Product Transport**. You can define the target system for the product transport here.

See also

For more information about the product transport for utilities products, see SAP Help Portal at <http://help.sap.com> under **SAP Business Suite -> SAP Customer Relationship Management -> SAP Enhancement Package 3 for CRM 7.0 (SP03) -> SAP CRM for Industries -> Utilities Industry -> Functions for the Utilities Industry -> Product Modeling for Utilities -> Transporting Utilities Products**.

Business Function Products Enhancements 1 for Utilities

CRM_UT_PROD_ENH_1: Business Function Products Enhancements 1 for Utilities (New for SP03)

Use

As of SAP enhancement package 3 (SP03) for SAP CRM 7.0, the business function **Product Enhancements 1 for Utilities** (CRM_UT_PROD_ENH_1) is available. This business function provides you with the following features and functional enhancements:

- **OData Service for Product Finder and Configurator**
The service represents the Product Finder and Configurator (PFC) function in OData format on the Internet. This means the PFC can be used with all the usual features from the PFC context outside of the call center.
- **Reopening Saved Product Finder and Configurator Documents in Interaction Center**
If you create and save a quotation or a contract, which originates from the Product Finder and Configurator (PFC), the system also saves the document for the product determination object. Using a link, you can access the document for further use, for example to compare attribute values.
- **Additional User Interface (UI) Tags within Simplified Configuration**
New render types for attributes in the Simplified Configuration provided with this business function are:
 - Slider (OData service only)
 - Roadmap (OData service only)
 - Combined Fields (OData service only)
 - Accordion (OData service only)
 - MultiValue Fields
- **Simple Expression Generation for BRFplus Editor**
The BRFplus editor now supports the generation of frequently used expressions as condition columns in decision tables. System environment data, such as the confirmed business partner or business role and user information can be added without having to create procedure calls manually.
- **Multi-Values for Simplified Configuration Attributes**
You can now define multi-value fields in the Simplified Configuration. This feature allows multiple values for the same attribute.
- **BRFplus Usage Enhancements**
New result attributes have been introduced with the BRFplus function for the following application usages:
 - Result groups for the PFC can be determined dynamically in product lists.
 - Attribute presentation control supports the additional render types **Slider** and **Combined Fields** and means field label texts can be determined dynamically.
 - The Dynamic Value Help can be used to transfer additional information for an attribute to the OData Service for the PFC.

See also

For more information, see SAP Help Portal at <http://help.sap.com> under **SAP Business Suite**
-> **SAP Customer Relationship Management** -> **SAP Enhancement Package 3 for CRM 7.0**
-> **SAP CRM for Industries** -> **Utilities Industry** -> **Functions for the Utilities Industry**.

Business Function Utilities HANA Free Text Search

CRM_UT_HANA_SCH: Business Function Utilities HANA Free Text Search (New for SP03)

Use

As of SAP Enhancement Package 3 (SP03) for SAP CRM 7.0, the CRM_UT_HANA_SCH: Business Function Utilities HANA Free Text Search (Reversible) is available for identifying and confirming business partners in the Interaction Center for the business roles UTIL_IC and UTIL_IC_REG.

Effects on Existing Data

Switch Between Standard Search and HANA Free Text Search on the Identification page

You can switch to HANA Free Text Search by choosing the *Free Text Search* pushbutton in the top left corner above the *Search Criteria* section on the *Identification* page. You can switch back to the standard search by choosing the *Standard Search* pushbutton in the top left corner above the free text search field.

Search for a Business Partner

You can search for a business partner by typing free text in the search field, which may correspond to one, or a combination of, the following search criteria: business partner ID, last name, first name, address.

While typing, you will see a list of business partner suggestions in the drop down list; you can select a desired suggestion to confirm it or continue typing to retrieve more specific results.

Confirm Business Partner

You can confirm a business partner by using one of the following methods after typing free text in the search field:

- Pressing the **ENTER** key (in the case of a single hit)
- Clicking on a desired suggestion in the drop down list
- Using the arrow down key to select the desired suggestion from the drop down list and pressing the **ENTER** key

Fault Tolerance

When performing a free text search, a perimeter for fault tolerance exists. This means that some of the results of your search may not be an exact match for what you have typed in.

See also

For more information, see SAP Library for *Customer Relationship Management* on SAP Help Portal at <http://help.sap.com/utilities-crm703> under *Application Help-> SAP CRM for Industries-> Utilities-> Functions for the Utilities Industry-> Functions for the Interaction Center (Utilities Industry)-> Account*.

SAP CRM for Industries: Healthcare

Business Function SAP CRM and Patient Management Integration

CRM_ISH_PM_1: Merging of Duplicate Accounts (Enhanced)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **SAP CRM and Patient Management Integration** (CRM_ISH_PM_1), merging of duplicate **accounts** has the following changes:

- Merging of accounts that are connected with patients can be triggered from SAP ERP. When you merge patients in SAP ERP, the connected accounts are merged automatically in the background in SAP CRM.
- If two accounts are connected with patients that exist in the same **institution**, you can merge the accounts from SAP ERP only.

CRM_ISH_PM_1: Replication of Services and Service Groups from SAP ERP (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **SAP CRM and Patient Management Integration** (CRM_ISH_PM_1), you can replicate **services** and **service groups** from SAP ERP. The services and service groups exist in SAP CRM as **products** with the **Service product type**.

Effects on Data Transfer

You perform initial data transfer using the ? adapter object. To do this, on the **SAP Easy Access** screen, you choose **Architecture and Technology -> Middleware -> Data Exchange -> Initial Load -> Start**.

CRM_ISH_PM_1: Interaction Center WebClient for Healthcare (Enhanced)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, business function **SAP CRM and Patient Management Integration** (CRM_ISH_PM_1), the business role **Patient Management IC Agent** (CRM_ISH) provides a new assignment block **Movements**. This assignment block displays the following movement data of patients:

- Institution
- Date and time

Business Function-Independent Features

WebClient UI Framework

Application Enhancement Tool - Usage of Deep Tables (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, you can use the application enhancement tool (AET) in the WebClient UI Framework for CRM business transactions to create your customer tables in a structured manner as deep tables.

Previously, the AET customer enhancement restricted the creation of new fields or new tables at the level of a CRM business transaction header or business transaction item. You can now use deep tables as the basis for combining customer tables as a hierarchical structure with superior and subsidiary customer-defined tables.

You can use deep tables to organize your customer enhancement data according to a logical and clearly defined structure. In a deep table you can link from a table entry to a subsidiary table. In the WebClient UI, the subsidiary tables are displayed as sub overview pages.

In the expert mode, you specify a table to be used in deep tables in the table header data by selecting the checkbox **Allow Sub Tables**. The structuring of tables as a deep table takes place in the common table configuration view of the AET.

See also

For more information, see SAP Library for SAP Customer Relationship Management on SAP Help Portal at <http://help.sap.com/crm> -> **SAP CRM 7.03 -> Application Help -> SAP Customer Relationship Management -> WebClient UI Framework -> Application Enhancement Tool -> Tables -> Deep Table**.

Corbu Skin (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, you can use the Corbu skin for SAP CRM.

Effects on Customizing

To use the Corbu skin, you must personalize the layout of the user interface.

Master Data

Duplicate Check for Business Partners on SAP HANA Database (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, you can run a duplicate check for business partners on a SAP HANA database. This feature is free of charge if you have a runtime license for the SAP HANA database.

Note that you can only run a duplicate check on the SAP HANA database in a stand-alone configuration. In a side-by-side configuration, you cannot use this duplicate check.

Effects on Customizing

For information about Customizing the duplicate check, see Customizing for ***Customer Relationship Management***, under ***Master Data -> Business Partner -> Activate and Configure Duplicate Check***.

See also

SAP Note 1862997

Installed Base Components (Enhanced)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, you can indicate whether installed base components belong to an installed base or are incorporated from another installed base component.

See also

For information about installed base components, see SAP Library for SAP CRM on SAP Help Portal at <http://help.sap.com/crm>. Choose a release and then **Application Help**. In SAP Library, choose **Master Data -> Installed Base Management -> Installed Bases -> Installed Base Components**.

Attribute Input Help for Listing Items (Enhanced)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, you can do the following:

- Provide input help for a set type's attribute that has no value table or fixed values
- Adjust input help that is filled using a value table or with fixed values (such as, by filtering, sorting, and concatenating)

Effects on Customizing

You make settings in **BAdI: Attribute Input Help for Listing Items**.

Basic Functions

Simulation Tool for the Transaction Tax Engine (Enhanced)

Use

Previously, you could use the simulation tool for the transaction tax engine (transaction TTE_SIMULATION) as follows:

- To simulate tax calculation as a standalone tool
- To examine how tax calculation was determined (for example, for orders and billing)

As of SAP enhancement package 3 for SAP CRM 7.0, you can use the simulation tool for the transaction tax engine **on the WebClient UI** to examine how tax calculation was determined (for example, for orders and billing). Note the following about the simulation tool for the transaction tax engine on the WebClient UI:

- You cannot use the simulation tool for the transaction tax engine as a standalone tool.
- You cannot save the simulation document of the transaction tax engine by name and country. However, you can view the simulation document of the transaction tax engine for each order.
- You cannot edit the simulation document of the transaction tax engine.

See also

SAP Library for SAP CRM on SAP Help Portal at <http://help.sap.com/crm-core>. Choose a release and then **Application Help**. In SAP Library, choose **Sales -> Taxes -> The Transaction Tax Engine -> The Simulation Tool**.

Sales

Product Proposals (Enhanced)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, you can make a setting in Customizing so that when you enter product IDs in the assignment block for items, the system only automatically recalculates **product proposals** after you enter the first product ID (afterwards, the system only recalculates on request). That is, the system does not **automatically** recalculate after you enter additional product IDs and this increases system performance.

Effects on Customizing

- For CRM sales transactions, you make the setting in Customizing for SAP CRM under **Customer Relationship Management -> Transactions -> Settings for Sales Transactions -> Product Proposals in Quotations and Orders -> Method Schemas for Product Proposals -> Assign Method Schema to Transaction Type**.
- For ERP sales documents in SAP CRM, you make the setting in Customizing for SAP CRM under **Customer Relationship Management -> Transactions -> Settings for ERP Transactions Maintained via CRM -> Product Proposals -> Assign Method Schema to ERP Transaction Type**.

See also

For more information about product proposals, see SAP Library for SAP CRM on SAP Help Portal at <http://help.sap.com/crm-core>. Choose a release and then **Application Help**. In SAP Library, choose **Sales -> Sales Quotation and Order Management -> Sales Transactions -> Products -> Product Proposals in Sales Transactions**.

Fast Change for ERP Sales Documents (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, you can quickly change rejection reasons and **requested delivery dates** of multiple items in supported ERP sales documents in SAP CRM (that is, ERP **sales orders** and ERP **quotations**).

If you use fast change of rejection reason to choose the blank rejection reason, the system clears the rejection reason of all selected items.

See also

For more information about ERP sales documents in SAP CRM, see SAP Library for SAP CRM on SAP Help Portal at <http://help.sap.com/crm-core>. Choose a release and then **Application Help**. In SAP Library, choose **Sales -> Sales Quotation and Order Management -> Sales Transactions -> Entry of ERP Sales Documents in SAP CRM**.

Sales Professional Business Role (Enhanced for SP02)

Use

As of SAP enhancement package 3 (SP02) for SAP CRM 7.0, when you create your business role from the predefined business role for sales professionals (SALESPRO), the system displays the hyperlinks and fields in SAP CRM needed for working with ERP sales documents in SAP CRM.

Effects on Customizing

You define your business role by copying the standard business role SALESPRO to your own business role in Customizing for SAP CRM under **Customer Relationship Management -> UI Framework -> Business Roles -> Define Business Role**.

See also

- For more information about ERP sales documents in SAP CRM, see SAP Library for SAP CRM on SAP Help Portal at <http://help.sap.com/crm-core>. Choose a release and then **Application Help**. In SAP Library, choose **Sales -> Sales Quotation and Order Management -> Sales Transactions -> Entry of ERP Sales Documents in SAP CRM**.
- For more information about business roles in SAP CRM, see SAP Library for SAP CRM on SAP Help Portal at <http://help.sap.com/crm-core>. Choose a release and then **Application Help**. In SAP Library, choose **WebClient UI Framework -> Business Roles**.
- For more information about creating and changing ERP sales documents in SAP CRM, see SAP Note 1236015.

Service

Archiving Objects for Service (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, the following archiving objects are available for service transactions:

- CRM_OAGRMT (for outline agreements in sales and service)
- CRM_BILREQ (for billing requests)
- CRM_SRVPLN (for service plans)

Service Resource Planning with SAP liveCache (Changed)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, you can no longer use SAP liveCache version 7.6. You must upgrade to version 7.7.

For more information about upgrading, see SAP Note 1706260.

Product Visualization with SAP Visual Enterprise Viewer (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, the SAP Visual Enterprise (VE) Viewer is integrated with service orders and products. Integration of the SAP VE Viewer enables you to make complex, interactive product graphics and graphic-based work instructions available to service employees in an intuitive format in the following places:

- In service orders
Employees can do the following:
 - Display and explore a reference object or product
 - Select faulty components or spare parts from a graphic
 - Display problem-specific maintenance descriptions and animated repair instructions
- In product master data
Employees can easily access graphical product information within SAP CRM without knowledge of graphics software.

Product graphics can be stored in SAP CRM or SAP ERP. Graphical work instructions can only be stored in SAP ERP.

Note:

If you want to use files stored in SAP ERP and want to use the standard logic for retrieving the SAP VE Viewer files, you need to implement SAP enhancement package 6 for SAP ERP 6.0.

See also

For more information see SAP Library for SAP CRM in SAP Help Portal at <http://help.sap.com/crm-core> -> **SAP Enhancement Package 3 for SAP CRM 7.0** -> **Application Help:**

- **Master Data -> Products -> Functions -> Product Visualization in SAP Visual Enterprise Viewer**
- **Service -> Service Orders and Quotations -> Visualization of Products and Work Instructions in Service Orders**

Interaction Center

Interaction Center Editors for E-Mails, Faxes, and Letters (Enhanced)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, the Interaction Center (IC) editors for creating e-mails, faxes, and letters have been enhanced as follows:

- Existing features are organized into assignment blocks.
- You can adjust the size of the editors using drag and drop.

You can also make settings to determine whether IC agents can see the following:

- Fields for faxes (subject, date, and from fields)
- Fields for letters (subject, date, from, and to fields)
- Default editor buttons or a reduced set of editor buttons (for e-mails, faxes, and letters)

Note that the toolbar that contains the *Save*, *Send*, and *Delete* pushbuttons is now located at the top of the screen.

Effects on System Administration

You can configure assignment blocks using the UI Component Workbench (transaction **BSP_WD_CMPWB**). IC agents can then expand or collapse the assignment blocks on the Interaction Center WebClient UI.

Effects on Customizing

You can make settings to display fields (for example, subject, date, and from fields) and editor buttons in Customizing activity **Define Parameters**. If you make fields visible, IC agents can personalize by choosing to show or hide those fields. The system saves IC agent personalization for subsequent logons. If you set no parameters, the system shows all fields.

See also

- **Standard Responses (Enhanced)**
- SAP Library for SAP CRM on SAP Help Portal at <http://help.sap.com/crm-core>. Choose a release and then **Application Help**. In SAP Library, choose **Interaction Center -> Interaction Center WebClient**.

ICI Trace Analysis (Enhanced)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, you can use the ***Display Integrated Communication Interface Trace*** utility as follows:

- You can search for trace files by the following:
 - Multiple users
 - Trace name
 - Communication system
 - Communication type (that is, telephone, e-mail, chat, and **action item**)Note that the system automatically determines the communication type for new traces. However, you must make entries for trace name and communication system.
- You can load traces that you save from your Interaction Center web browser trace window.
- You can choose to display the trace content as follows:
 - Text view
 - Hierarchical view

You make settings on the **SAP Easy Access** screen under **Interaction Center -> Interaction Center WebClient -> Utilities -> Display Integrated Communication Interface Trace**.

Standard Responses (Enhanced)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, IC agents can do the following:

- View the source of standard response proposals (for example, from favorites or manual searches)
- Sort and filter standard responses
- Manage favorite standard responses
- Choose the language of standard responses after searches

Additionally, you can use default language determination for standard response texts. Whenever the standard response view is included on the WebClient UI, the system performs default language determination through a sequence of steps. As soon as one of the steps finds a language for which a translation of the standard response text exists, the method ends and uses this language. If a step fails to determine a language, the next step is used for language determination. If all the steps fail to determine a language, the system chooses the first language in the list of available languages.

Effects on Customizing

You can change default language determination for standard response texts in Customizing activity **BAdI: Language Determination for Standard Response Texts**.

See also

SAP Library for SAP CRM on SAP Help Portal at <http://help.sap.com/crm-core>. Choose a release and then **Application Help**. In SAP Library, choose **Interaction Center -> Interaction Center WebClient -> E-Mail -> Standard Responses**.

Virus Scan Profile for ICI Mail (New for SP02)

Use

As of the following releases, you can use the virus scan profile **/IC_CCS_MCM/ICI_MAIL** to enable the scanning of e-mails that enter the system through the Integrated Communication Interface:

- SAP enhancement package 3 (SP02) for SAP CRM 7.0
- SAP enhancement package 2 (SP09) for SAP CRM 7.0
- SAP enhancement package 1 (SP11) for SAP CRM 7.0
- SAP CRM 7.0 SP14

Effects on Customizing

You must make the settings described in the organizational activity in Customizing for SAP CRM under **Customer Relationship Management -> Interaction Center WebClient -> Basic Functions -> Communication Channels -> Define Virus Scan Profiles for ICI Mail**.

See also

- SAP Note 1699357
- SAP Library for SAP CRM on SAP Help Portal at <http://help.sap.com/crm-core>. Choose a release and then **Application Help**. In SAP Library, choose **Interaction Center -> Interaction Center WebClient -> E-Mail**.

ABAP Push Channel (APC) Usage in Interaction Center (New for SP03)

Use

As of SAP enhancement package 3 (SP03) for SAP CRM 7.0, ABAP Push Channel has been enabled for the Interaction Center (IC), consisting of a permanent WebSocket connection. When the APC is active, the server informs the Web browser about events like an incoming phone call immediately and directly, providing an alternative to the polling mechanism of the IC context area.

Effects on System Administration

Your Web browser type and version determine whether the ABAP Push Channel technology is supported for your system.

Effects on Customizing

You can activate the APC in the Customizing activity **Define Context Area Profile**.

Industries

Enterprise Services for FS-BP (New)

Use

As of SAP enhancement package 3 for SAP CRM 7.0, the following new Enterprise Services are available in namespace <http://sap.com/xi/CRM/FS-BP/Global2>:

Business Partner Data Management (process component)

Business Partner (business object)

- Confirm Business Partner Bulk Creation
(BusinessPartnerBulkCreateConfirmation_Out)
- Confirm Business Partner Bulk Update
(BusinessPartnerBulkUpdateConfirmation_Out)
- Create Business Partner (BusinessPartnerCreateRequestConfirmation_In)
- Create Business Partner as Bulk (BusinessPartnerBulkCreateRequest_In)
- Find Business Partner Basic Data by Elements
(BusinessPartnerBasicDataByElementsQueryResponse_In)
- Inform of Business Partner as Bulk (BusinessPartnerBulkInformation_Out)
- Inform of Business Partner Purpose Completion as Bulk
(BusinessPartnerPurposeCompletionBulkInformation_Out)
- Inform of Business Partner Purpose Reset as Bulk
(BusinessPartnerPurposeResetBulkInformation_Out)
- Retrieve Business Partner
(BusinessPartnerRetrievalByIdentifyingElementsQueryResponse_In)
- Update Business Partner (BusinessPartnerUpdateRequestConfirmation_In)
- Update Business Partner as Bulk (BusinessPartnerBulkUpdateRequest_In)

Business Partner Relationship (business object)

- Cancel Business Partner Relationship as Bulk
(BusinessPartnerRelationshipBulkCancelRequest_In)
- Cancel Business Partner Relationship as Bundle
(BusinessPartnerRelationshipBundleCancelRequestConfirmation_In)
- Confirm Business Partner Relationship Bulk Cancellation
(BusinessPartnerRelationshipBulkCancelConfirmation_Out)
- Confirm Business Partner Relationship Bulk Creation
(BusinessPartnerRelationshipBulkCreateConfirmation_Out)
- Confirm Business Partner Relationship Bulk Update
(BusinessPartnerRelationshipBulkUpdateConfirmation_Out)
- Create Business Partner Relationship as Bulk
(BusinessPartnerRelationshipBulkCreateRequest_In)
- Create Business Partner Relationship as Bundle
(BusinessPartnerRelationshipBundleCreateRequestConfirmation_In)
- Find Business Partner Relationship Basic Data by Elements
(BusinessPartnerRelationshipBasicDataByElementsQueryResponse_In)
- Inform of Business Partner Relationship as Bulk
(BusinessPartnerRelationshipBulkInformation_Out)

- Retrieve Business Partner Relationship
(BusinessPartnerRelationshipRetrievalByIdentifyingElementsQueryResponse_In)
- Update Business Partner Relationship as Bundle
(BusinessPartnerRelationshipBundleUpdateRequestConfirmation_In)
- Update Business Partner Relationship as Bulk
(BusinessPartnerRelationshipBulkUpdateRequest_In)

Business Partner Cleansing Case (business object)

- Notify of Business Partner Data Cleansing Case Completion as Bulk
(BusinessPartnerDataCleansingCaseCompletionBulkNotification_Out)

See also

For more information, see:

- SAP note 1702814 (*Additional Information About Enterprise Services*)
- SAP Library for Customer Relationship Management on SAP Help Portal at <http://help.sap.com/crm>

Under **Application Help**, open the SAP Library and choose **Enterprise Services in SAP Customer Relationship Management**