SAP Customer Relationship Management 7.0
Including SAP Enhancement Package 4
Using SAP CRM 7.0, SAP ERP 6.0, and SAP NetWeaver 7.5
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Document History

Recommendation

Before you start the implementation, make sure you have the latest version of this document. You can find the latest version on at http://service.sap.com/instguides.

The following table provides an overview on the most important document changes:

Table 1:

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.00</td>
<td>2016-01-20</td>
<td>First version</td>
</tr>
<tr>
<td>1.01</td>
<td>2016-05-04</td>
<td>• Updated navigation paths and release information throughout the guide.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Updated information about SAP NetWeaver releases in section SAP CRM Overview → System Landscapes.</td>
</tr>
</tbody>
</table>
1 About This Document

Use

The Master Guide for the SAP Customer Relationship Management (SAP CRM) solution provides a central starting point for the technical implementation of SAP CRM and includes installation information as well as upgrade information. Use this Master Guide to obtain an overview of SAP CRM, its software units, and scenarios from a technical perspective. The Master Guide helps you design your CRM system landscape. It refers you to the required detailed documentation, in particular:

- Installation and upgrade guides for single software units
- SAP Notes
- Configuration documentation
- SAP Library documentation

In addition, you need further information that cannot be covered by the Master Guide during your planning process. See Related Information [page 98] for references to further information sources.

The Master Guide consists of the following main sections:

- **Installation and Upgrade of SAP Enhancement Packages [page 8]**
  This section introduces you to the concept of SAP enhancement packages and describes how to implement them.

- **SAP CRM Overview [page 24]**
  This section introduces SAP CRM and its installable software units. It also provides information about the SAP CRM system landscape as well as information about the sequence of the implementation steps or upgrade steps.

- **Solution-Wide Topics [page 86]**
  Here you can find information about tools and procedures available for enhancing SAP CRM. This section also contains information about the integration of business objects and service-oriented architecture (SOA).

- **Appendix**
  This section provides you with references to the related information sources, such as related Industry Master Guides, SAP Notes, or other information sources available on SAP Service Marketplace. It also includes a chapter on tools for planning your system landscape.

⚠️ Caution

Make sure you have the latest version of the Master Guide by checking SAP Service Marketplace immediately before starting the installation or upgrade. The Master Guide is regularly updated on SAP Service Marketplace at [http://service.sap.com/crm-inst](http://service.sap.com/crm-inst).

**SAP Fiori Apps**

Constraints

This document does not contain information about industry scenarios. For information about industry scenarios, see the corresponding Industry Solution Master Guide. You can find a list of Industry Solution Master Guides in the Appendix.
### 2 SAP Enhancement Packages

#### 2.1 Enhancement Package Key Concept

**Use**

We have adapted our major release strategy to better fit your adoption cycle. To ensure that you benefit from new developments and innovations while minimizing the impact on your core operational systems, SAP uses enhancement packages to speed up the delivery of new functions.

With SAP enhancement packages, you can install and activate new functions depending on your business needs without having to perform a system upgrade.

You can selectively implement the new functions and activate the software upon business demand. As a result, you can isolate the impact of software updates and make new functions available faster due to shortened test cycles.

**Implementation**

There are three different scenarios to implement an enhancement package:

- Installation of an enhancement package on an existing SAP system (update)
- New installation of an SAP system including an enhancement package (installation)
- Upgrade of an SAP system including an enhancement package (upgrade)

To implement new business functions you carry out the following two steps:

- Technical installation of an enhancement package
- Activation of business functions using the switch framework technology

You have a choice on both levels – installation and activation. You do not need to install a full enhancement package. Instead, you can update the software components that are related to the functional enhancements you want to use.

**Note**

Keep in mind that you cannot mix the installation of different enhancement package versions in your ABAP-based SAP system. You can have just one enhancement package version in the SAP system.

From a business point of view, functional enhancements are grouped into business functions (BFs). The technical installation of the business functions does not change the system behavior. The new functions are available in the
system, but are not active. After the installation, no user interface or process change takes place. You must explicitly activate new functions so that they become visible in the system. As a result, changes are predictable and there are no side effects as only the activated areas change.

With the switch framework technology (transaction SFW5), it is possible to control the activation of new SAP objects in ABAP-based SAP systems. The activation process triggers a background job that automatically performs all changes in the SAP system.

⚠️ Caution
You cannot reverse most business function once they are activated. Due to technical restrictions, only a limited number of business functions are reversible.

After you have activated a business function, you can see the changes and new developments in the SAP system, for example:

- Menu entries
- New screens
- New fields on the application user interfaces
- IMG activities required for the implementation
- New table entries in Customizing tables and system tables

You can create a transport request with the current settings of the switch framework. You can check functional changes and the impact of an activated business function in advance in the business function documentation.

👉 Recommendation
Test the installation and activation on a sandbox system.

Maintenance

SAP enhancement packages have Support Packages of their own that are equivalent to the Support Package versions of the underlying SAP system. We highly recommend installing the enhancement package in combination with the latest available Support Package stack. This approach reduces installation, modification adjustment, and testing effort. Using this strategy, you can install SAP enhancement packages as a normal maintenance activity together with Support Package stacks.

An enhancement package requires a specific Support Package stack level in the source release SAP system.

⚠️ Note
If the SAP system is on a lower Support Package stack level, all relevant Support Package stacks for the enhancement package installation are automatically included into the download queue by the Maintenance Optimizer, as well as the latest available Support Packages for the enhancement package.

For a better understanding of the general concepts and principles of updating a system, see the Maintenance Planning Guide at http://service.sap.com/mopz section “How-To’s and Guides”.

Tools

The enhancement package installation requires the following tools:

1. SAP Solution Manager
Use of SAP Solution Manager is mandatory.

**Tool versions:**
You require at least one of the following versions of SAP Solution Manager.
- SAP Solution Manager 7.0 EHP1, SP23 or higher
- SAP Solution Manager 7.1, SP01 or higher

SAP Solution Manager 7.0 EHP1, SP23 supports all update and maintenance processes (for example, transaction **SMSY** or Maintenance Optimizer). There is no need to upgrade to SAP Solution Manager 7.1.

For more information, see SAP Service Marketplace at [http://service.sap.com/solutionmanager](http://service.sap.com/solutionmanager).

**System Landscape Maintenance with SAP Solution Manager:**
Make sure that you have correctly defined and maintained your system landscape in SAP Solution Manager:
- SAP Solution Manager 7.0: Use the SAP Solution Manager System Landscape (transaction **SMSY**) for the complete system description.
- SAP Solution Manager 7.1 SP01 to SP04, use the Landscape Management Database (transaction **LMDB**) to maintain technical system information. For logical product system information, use transaction **SMSY**.
- SAP Solution Manager 7.1 SP05 and higher, use the Landscape Management Database (transaction **LMDB**) for the complete system description. (The transaction **SMSY** is no longer required.)


**Landscape Verification with SAP Solution Manager:**
To verify and correct your system landscape, SAP highly recommends that you use the verification functions of the SAP Solution Manager:
- SAP Solution Manager 7.0 to 7.1 SP04: Use Landscape Verification 1.0 for SAP Solution Manager. This add-on allows you to identify and correct issues in your SAP Solution Manager landscape (transaction **SMSY**) before they cause problems, for example during a system update. Examples for errors are a missing connection to the System Landscape Directory or the wrong assignment of products to technical systems. For each type of error, a generic description for the solution is provided.
- SAP Solution Manager 7.1 SP05 or higher: Use the landscape verification function that is embedded into the product system editor of the Landscape Management Database (LMDB). It replaces the previous Landscape Verification tool.

For more information about the landscape verification, see the SAP Community Network at [http://scn.sap.com/docs/DOC-8793](http://scn.sap.com/docs/DOC-8793).

2. **Installation or upgrade tools (depending on your scenario)**
- SAP Solution Manager Maintenance Optimizer (MOpz)
  The **SAP Solution Manager Maintenance Optimizer (MOpz)** (accessible from the Change Management work center) supports the download of a consistent queue that includes all necessary Support Packages and enhancement packages. In addition, SAP Solution Manager calculates a valid import queue for the selected SAP system and generates the enhancement package stack configuration file that you require for the installation.
○ Software Provisioning Manager 1.0
  For the new installation of an SAP system including an enhancement package you use the standard installation tool software provisioning manager 1.0.

○ Software Update Manager (SUM)
  To install an enhancement package on an existing SAP system, as well as for the upgrade of an SAP system to a higher release including an enhancement package, you use the Software Update Manager (SUM).

### 2.2 Key Facts About Enhancement Packages

#### Use

The following list summarizes important facts about the enhancement package concept and recommended approaches:

- Install only selected parts of the enhancement package. The selection is driven by the functional need from a business point of view.
- You cannot mix the installation of different enhancement package versions in your ABAP-based SAP system. You can have just one enhancement package version in the SAP system. This means, if you have already updated technical usages to a previous EHP you need to apply the current EHP to those components as well.
- SAP enhancement packages are cumulative, meaning that each new enhancement package includes new innovations of its own as well as all innovations delivered with prior packages.
- We recommend installing the latest available enhancement package version.
- Install enhancement packages and Support Packages in one single step (this includes the preconditioned Support Packages).
- SAP enhancement packages have Support Packages of their own that are equivalent to the Support Package versions of the underlying SAP system.
- SAP enhancement packages have the same maintenance period as the underlying core application.
- The installation of an enhancement package is irreversible.
- As long as you do not activate a business function, the installation of an enhancement package has no impact on existing business processes or user interfaces. You can only activate business functions in ABAP-based systems, not in Java-based SAP systems.
- The activation of most business functions and extension sets is irreversible. Only a small number of business functions is reversible. Test the installation process and activation of new functions in advance on a sandbox system. Ensure that you evaluate the runtime and the SAP system behavior, its dependencies and impacts. Make sure that your SAP system is free of errors before going live.
3 Main Implementation Processes and Related Documentation

The following processes are the most important implementation processes for installing, updating, and upgrading SAP NetWeaver server-based SAP applications:

- New installation of an SAP system including an enhancement package (installation)
- Installation of an enhancement package on an existing SAP system (update)
- Upgrade to an SAP system including an enhancement package (upgrade)

Each of the implementation processes consists of a planning phase and an implementation phase. Each phase is divided into steps that describe the processes in detail. Each step contains references to the corresponding documentation to ensure that you can easily find the information you need.

The process sequences give a comprehensive overview of all possible steps. You only need to select the steps that are relevant for your requirements.

Note

If you have already decided which business scenarios and business functions to implement, you can ignore the corresponding step in the planning phase of the installation, update, or upgrade process sequences.

The following figure shows the Application Lifecycle Management phases, the associated user profiles, and how they map to the slightly simplified planning and implementation phases described in the sections linked below.
Figure 1: Application Lifecycle Management

For more information about Application Lifecycle Management, see [http://support.sap.com/solution-manager/processes.html](http://support.sap.com/solution-manager/processes.html).

The processes are described in the following sections:

- **Planning for Installation, Update, and Upgrade Processes** [page 13]
- **Implementation of the Installation Process** [page 17]
- **Implementation of the Update Process** [page 19]
- **Implementation of the Upgrade Process** [page 21]

### 3.1 Planning for Installation, Update, and Upgrade Processes

The planning phase is the general starting point for any kind of enhancement package implementation project. The detailed definition of your scope and requirements is the key success factor for a smooth project. You discover new developments and functions to find out which solution best suits your needs and you cover the business aspects as well as the technical aspects of your implementation.

The following table lists the topics you need to consider in the planning phase with references to relevant documentation. You have to look into those steps that are relevant for your requirements.
### Note
How to read the table in this section:

- The first column contains the name of the process step.
- The middle column contains a short description of the step and some documentation references that are always followed by a number in square brackets, for example, [1]. This number corresponds with the same number in a list in the third column, for example, 1.
- The third column contains the full title of the documents referred to in the middle column, as well as where to find them. The documents are numbered in the same way as in the middle column.

### Table 2:

<table>
<thead>
<tr>
<th>Steps</th>
<th>Step Description</th>
<th>Documentation</th>
</tr>
</thead>
</table>
| Scope and Requirements            | Define your business scope, such as business scenarios and business functions you want to use.      | 1. http://service.sap.com/crm-ehp  
Enhancement Packages                                             |
Business Functions for SAP Customer Relationship Management |
|                                   | You can find detailed information about business functions on the SAP Help Portal [3].              |                                                                               |
| Dependencies to Other Systems in  |                                                                                                     | http://service.sap.com/uda                                                   |
| the Landscape                     |                                                                                                     |                                                                               |
|                                   | **Note**                                                                                           |                                                                               |
|                                   | Only relevant for upgrades.                                                                        |                                                                               |
|                                   | The upgrade of one SAP system might have an impact on other systems in your system landscape. Check whether such dependencies exist using the Upgrade Dependency Analyzer. |                                                                               |
| Landscape Planning                | If you want to change or modify your existing system landscape, make yourself familiar with the available system landscape options. For detailed information about business landscape options, use the planning guide for SAP business suite landscape implementation. | http://service.sap.com/crm-inst  
Plan                                                                 |
<p>|                                   |                                                                                                     | For more information, see SAP Note 1388258.                                 |</p>
<table>
<thead>
<tr>
<th>Steps</th>
<th>Step Description</th>
<th>Documentation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Caution</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>It is not possible to uninstall an enhancement package. Furthermore, you cannot revoke the activation of most business functions and it is only possible to transport complete business function switch settings across your system landscape. For these reasons, we recommend testing the business functions thoroughly in a dedicated evaluation system (not the development system), until you are sure that you definitely want to use them. It makes sense to use a copy of your production system as evaluation system.</td>
<td></td>
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</table>

| Hardware & Software Pre-requisites | Check the availability of the required SPs or SP stack of the application as well as for the corresponding SAP NetWeaver release. The upgrade stops if the equivalent support package of the target release is missing. It is not a prerequisite and not recommended to implement the latest SP stack in your source system before doing an upgrade or EHP implementation. The support package equivalence levels are described in SAP Notes [1]. The SP stack implementation is also described in the Software Update Manager guide [2]. For more information about SP stack strategy and the release schedule, see the SAP Support Portal [3]. | 1. **SP Stack notes:**
   ○ SAP Note [837413](http://help.sap.com/crm-core) (SAP CRM)
   ○ SAP Note [789220](http://help.sap.com/crm-core) (SAP NetWeaver)
| Check which platforms are supported for your target release (OS/DB dependencies) with the Product Availability Matrix. | [http://support.sap.com/pam](http://support.sap.com/pam) |
Steps | Step Description | Documentation
---|---|---
| Check which hardware sizing is required for your target release. | For initial sizing, use the Quick Sizer results for database size (disk) and CPU requirements (SAP Application Performance Standard) as input for HANA main memory, disk space, and CPU sizing. You can find the Quick Sizer on the SAP Service Marketplace at [http://service.sap.com/sizing](http://service.sap.com/sizing). |

Solution Manager Prerequisites

- Make sure that your SAP Solution Manager system has the content **ST-ICO 150_700 SP 38** and the support package (SP) level SAP Solution Manager 7.1 SP Stack 04.

  **Note**
  
  The use of the Solution Manager Content is recommended, not mandatory.

- Check if you need to do an update or upgrade of your SAP Solution Manager application or content and select your required upgrade or update:
  
  - Upgrade from source releases SAP Solution Manager 3.1 and 3.2.
  - Update from source releases SAP Solution Manager 7.0.

- After an upgrade or update to SAP Solution Manager, you must do the follow-up actions for software change management explained in the guide for solution operations.

  All SAP Solution Manager guides are available on SAP Service Marketplace at [http://service.sap.com/instguides](http://service.sap.com/instguides).

  **Note**
  
  You find guides for upgrading and updating under **Upgrade <choose tool if appropriate>**. You find the guide for solution operations under **Operations**.

Add-on Compatibility

- If you want to use add-ons, check their compatibility with your target release.

  SAP Note [2168082](http://service.sap.com/notes).

SAP Customer Relationship Management 7.0 Including SAP Enhancement Package 4
Main Implementation Processes and Related Documentation
### Testing
You perform regression and acceptance tests. After the installation of an SAP enhancement package, you find additional information with the help of the Impact Analyzer tool [2] and you can access test cases for individual business functions [3].

**i Note**
Switch BC Sets are also delivered with business functions. They are automatically unpacked when you activate the business function.

1. To use the Impact Analyzer call transaction SFW5 and right-click a business function.
2. To access test cases, call transaction SFW 5 and view the test cases in column *SAP Test Catalog*.

### 3.2 Implementation of the Installation Process

The following table lists the steps for a new installation of an SAP system including an enhancement package. The table lists all possible steps with references to the documentation relevant for each step. You must use those steps that are relevant for your requirements.

<table>
<thead>
<tr>
<th>Table 3:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sequence of Steps</strong></td>
</tr>
</tbody>
</table>
| 1 | System Preparation | Prepare your host systems, for example:  
- Install and update your operating system.  
- Create the file systems.  
- Check database requirements. | See the guides on SAP Service Marketplace at [http://service.sap.com/crm-inst<choose release> Install](http://service.sap.com/crm-inst<choose release> Install) |
| 2 | Installation Media | Make the required installation media (physical or downloaded media) available.  
A list of the installation media is found in the relevant SAP NW installation guide. | See the guides on SAP Service Marketplace at [http://service.sap.com/crm-inst<choose release> Install](http://service.sap.com/crm-inst<choose release> Install) |
| 3 | Installation | If required, install the database with the DB-specific installer.  
Run SAPinst to install your system. | See the guides on SAP Service Marketplace at [http://service.sap.com/crm-inst<choose release> Install](http://service.sap.com/crm-inst<choose release> Install) |
<table>
<thead>
<tr>
<th>Sequence of Steps</th>
<th>Step Descriptions</th>
<th>Documentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>Post-Installation Steps</td>
<td>Check the relevant installation tool guides and the SAP application-specific installation information in this guide. See the guides on SAP Service Marketplace at <a href="http://service.sap.com/crm-inst">http://service.sap.com/crm-inst</a> {choose release} install.</td>
</tr>
<tr>
<td>5</td>
<td>Content Installation</td>
<td>If required, you install SAP Business Warehouse content as an add-on as described in the relevant SAP Note. SAP Note 1000822.</td>
</tr>
</tbody>
</table>
| 6                 | Solution Manager Set-Up | To set up your SAP Solution Manager application, perform the following steps:  
1. Maintain system data in the SAP System Landscape Directory (SLD).  
2. Transfer system data from SLD to the SAP Solution Manager.  
3. Check the landscape data with the Landscape Verification tool.  
4. Create a maintenance transaction in SAP Solution Manager to calculate support packages and packages for technical usages. These steps are described in the Maintenance Planning Guide [1].  

For more information, see the SAP Developer Network:  
- SLD information [2]  
- Landscape Verification tool [3]

○ You must take into account specific landscape configuration and additional checks in the landscape verification wizard. For more information, see SAP Note 1791023. |
### 3.3 Implementation of the Update Process

The following table lists the steps for an installation of an enhancement package on an existing SAP system (update). The table lists all possible steps with references to the documentation relevant for each step. You must use those steps that are relevant for your requirements.

<table>
<thead>
<tr>
<th>Sequence of Steps</th>
<th>Step Descriptions</th>
<th>Documentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>Support Package Installation</td>
<td>The support package (SP) equivalence levels are described in SAP Notes [1]. Create a maintenance transaction in SAP Solution Manager to calculate support packages and packages for technical usages. Install them as needed. For more information about SP stack strategy, see the SAP Support Portal [2].</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1. SP Stack notes:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>○ SAP Note 837413 (SAP CRM)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>○ SAP Note 789220 (SAP NetWeaver)</td>
</tr>
<tr>
<td>8</td>
<td>Configuration</td>
<td>Configure new functions, for example new business functions, with the Solution Manager content [1].</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1. See the step Solution Manager Prerequisites in the planning section for the correct SAP Solution Manager content release.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>SAP Solution Manager &lt;version&gt;</td>
</tr>
<tr>
<td>9</td>
<td>Testing</td>
<td>Perform regression and acceptance tests.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For more information, see the table entry Testing in the section on Planning for Installation, Update, and Upgrade Processes [page 13] in this guide.</td>
</tr>
<tr>
<td>Sequence of Steps</td>
<td>Step Descriptions</td>
<td>Documentation</td>
</tr>
<tr>
<td>-------------------</td>
<td>-------------------</td>
<td>---------------</td>
</tr>
</tbody>
</table>
| 1 Solution Manager Preparation | To set up your SAP Solution Manager application, perform the following steps:  
1. Maintain system data in the SAP System Landscape Directory (SLD).  
2. Transfer system data from SLD to the SAP Solution Manager.  
3. Check the landscape data with the Landscape Verification tool.  
4. Create a maintenance transaction in SAP Solution Manager to calculate support packages and packages for technical usages.  
These steps are described in the Maintenance Planning Guide [1].  
For more information, see the SAP Developer Network:  
- SLD information [2]  
○ You must take into account specific landscape configuration and additional checks in the landscape verification wizard. For more information, see SAP Note 1791023. |
| 2 System Preparation | Prepare your system as described in the documentation, for example perform OS / DB-specific preparations. | See the guides on SAP Service Marketplace at [http://service.sap.com/crm-inst](http://service.sap.com/crm-inst) [choose release] Upgrade. |
| 3 Software Calculation & Download | Use the Maintenance Planner to calculate the required software packages.  
You can also select additional software packages (for example add-ons or additional product instances or software units).  
Download the software packages using the Download Manager. | See the user guide at [https://apps.support.sap.com/sap/support/mp](https://apps.support.sap.com/sap/support/mp). |
| 4 Enhancement Package Update | Run Software Update Manager to update your system with the software packages calculated in step 3. | See the guides on SAP Service Marketplace at [http://service.sap.com/crm-inst](http://service.sap.com/crm-inst) [choose release] Upgrade. |
| 5 Follow-Up Steps | Perform technical and application-specific follow-up activities (for example, activating business functions) after the enhancement package installation is done. | See the guides on SAP Service Marketplace at [http://service.sap.com/crm-inst](http://service.sap.com/crm-inst) [choose release] Upgrade. |
### 3.4 Implementation of the Upgrade Process

The following table lists the steps for an upgrade of an SAP system including an enhancement package. The table lists all possible steps with references to the documentation relevant for each step. You have to look into those steps that are relevant for your requirements.

<table>
<thead>
<tr>
<th>Sequence of Steps</th>
<th>Step Descriptions</th>
<th>Documentation</th>
</tr>
</thead>
</table>
| **6** Content Update | Check if you need to update content related to:  
- SAP NetWeaver Portal [1]  
  You use the Software Update Manager (SUM) to update portal content.  
- SAP Business Warehouse [2]  
- SAP NetWeaver Process Integration [3]  
2. SAP Note [1000822](http://help.sap.com)  
3. ○ SAP Note [836200](http://help.sap.com) and SAP Note [1515223](http://help.sap.com)  
| **7** Configuration | Configure newly installed enhancement package functions, for example new business functions with the Solution Manager content [1].  
*Note*  
The use of the Solution Manager Content is recommended, not mandatory.  
How to use the Solution Manager Content is described in the SAP Library documentation for SAP Solution Manager [2]. | 1. See the step Solution Manager Prerequisites in the planning section in *Planning for Installation, Update, and Upgrade Processes* [page 13] for the correct SAP Solution Manager content release.  
| **8** Configuration | Perform regression and acceptance tests. | For more information, see the table entry *Testing* in the section on *Planning for Installation, Update, and Upgrade Processes* [page 13] in this guide. |
Table 5:

<table>
<thead>
<tr>
<th>Sequence of Steps</th>
<th>Step Descriptions</th>
<th>Documentation</th>
</tr>
</thead>
</table>
| 1                 | Solution Manager Preparation | To set up your SAP Solution Manager application, perform the following steps:  
1. Maintain system data in the SAP System Landscape Directory (SLD).  
2. Transfer system data from SLD to the SAP Solution Manager.  
3. Check the landscape data with the Landscape Verification tool.  
4. Create a maintenance transaction in SAP Solution Manager to calculate support packages and packages for technical usages.  
These steps are described in the Maintenance Planning Guide [1].  
For more information, see the SAP Developer Network:  
• SLD information [2]  
○ You must take into account specific landscape configuration and additional checks in the landscape verification wizard. For more information, see SAP Note 1791023. |
| 2                 | System Preparation | Prepare your system as described in the documentation, for example perform OS/DB-specific preparations. | See the guides on SAP Service Marketplace at [http://service.sap.com/crm-inst](http://service.sap.com/crm-inst)<choose release>Upgrade</choose> |
| 3                 | Software Calculation & Download | Use the Maintenance Planner to calculate the required software packages.  
You can also select additional software packages (for example add-ons or additional product instances or software units).  
Download the software packages using the Download Manager. | See the user guide at [https://apps.support.sap.com/sap/support/mp/](https://apps.support.sap.com/sap/support/mp/) |
<p>| 4                 | SAP System Upgrade | Run Software Update Manager to upgrade your system to the target release including the selected software packages. | See the guides on SAP Service Marketplace at <a href="http://service.sap.com/crm-inst">http://service.sap.com/crm-inst</a>&lt;choose release&gt;Upgrade&lt;/choose&gt; |
| 5                 | Post-Upgrade Steps | Perform technical and application-specific follow-up activities after the upgrade is finished. | See the guides on SAP Service Marketplace at <a href="http://service.sap.com/crm-inst">http://service.sap.com/crm-inst</a>&lt;choose release&gt;Upgrade&lt;/choose&gt; |</p>
<table>
<thead>
<tr>
<th>Sequence of Steps</th>
<th>Step Descriptions</th>
<th>Documentation</th>
</tr>
</thead>
</table>
| 6 Content Upgrade | Check if you need to update content related to:  
  - SAP NetWeaver Portal [1]  
    You use the Software Update Manager (SUM) to update portal content.  
  - SAP Business Warehouse [2]  
  - SAP NetWeaver Process Integration [3]  
  For more information, see SAP Note 1388258. | 1. See the Help Portal at [http://help.sap.com/suitoolset](http://help.sap.com/suitoolset) | 2. SAP Note 1000822.  
  3. ○ SAP Note 836200 and SAP Note 1515223.  
| 7 Configuration   | Configure upgraded or new functions, for example new business functions, with the Solution Manager content [1].  
  **Note**  
  The use of the Solution Manager Content is recommended, not mandatory.  
  How to use the Solution Manager Content is described in the SAP Library documentation for SAP Solution Manager [2]. | 1. See the step Solution Manager Prerequisites in the planning section in Planning for Installation, Update, and Upgrade Processes [page 13] under for the correct SAP Solution Manager content release.  
| 8 Testing         | Perform regression and acceptance tests. | For more information, see the table entry Testing in the section on Planning for Installation, Update, and Upgrade Processes [page 13] in this guide. |
4 SAP CRM Overview

4.1 Introduction to SAP CRM

SAP Customer Relationship Management (SAP CRM) is a complete multichannel suite supporting all customer-facing lines of business across marketing, sales, and service, as well as customer interaction channels such as the interaction center, the Internet, and mobile clients.

It provides you with:

- Cross-industry and industry-specific end-to-end business processes
- Flexible and process-based deployment options
- An open, adaptable technology platform, powered by SAP NetWeaver

At the center of SAP CRM is the CRM server, which consists of CRM Enterprise functions, CRM Middleware, and various adapters. SAP CRM enables communication channels between the CRM system and mobile devices, the Web, and telephones or e-mail. SAP ERP systems can be used as back-end systems, whereas SAP Business Warehouse (SAP BW) and SAP Supply Chain Management (SCM) enhance the spectrum of functions.

4.2 Installable Software Units

The following table explains several installable software units that provide a large range of functions and how they are divided into groups in this document:

<table>
<thead>
<tr>
<th>Software Unit Group</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRM Core [page 25]</td>
<td>Software units that are essential for your CRM system landscape:</td>
</tr>
<tr>
<td></td>
<td>● CRM Application Server ABAP</td>
</tr>
<tr>
<td></td>
<td>● CRM Application Server Java</td>
</tr>
<tr>
<td></td>
<td>● WebClient UI</td>
</tr>
<tr>
<td></td>
<td>For more information, see Developing and Modifying Applications: SAP Net-</td>
</tr>
<tr>
<td></td>
<td>Weaver Development Infrastructure [page 90].</td>
</tr>
<tr>
<td>CRM Mobile Client Component [page 30]</td>
<td>Components required for a mobile system landscape</td>
</tr>
<tr>
<td>Workforce Deployment [page 32]</td>
<td>Component required for service orders</td>
</tr>
</tbody>
</table>
### Software Unit Group

<table>
<thead>
<tr>
<th>Software Unit Group</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standalone Components [page 33]</td>
<td>Components that provide additional functions. In most cases their use is optional.</td>
</tr>
<tr>
<td>Application Systems [page 34]</td>
<td>SAP ERP back end, as well as SAP Business Warehouse (SAP BW), SAP SCM server, and SAP SRM server</td>
</tr>
<tr>
<td>SAP Solution Manager [page 36]</td>
<td>SAP Solution Manager is mandatory for an SAP CRM implementation.</td>
</tr>
<tr>
<td>Content Types [page 38]</td>
<td>Different types of content that are available for SAP CRM, for example, content for the System Landscape Directory</td>
</tr>
</tbody>
</table>

### Note

Mobile applications that have been designed for smartphones or tablets and are based on SAP CRM are not part of SAP CRM itself. They represent different products. For more information, see the guides for mobile clients on SAP Service Marketplace at [http://service.sap.com/crm-inst](http://service.sap.com/crm-inst). Visit [http://service.sap.com/crm-inst](http://service.sap.com/crm-inst) to choose your release and install.

### 4.2.1 CRM Core

#### Installable software units of CRM Core

CRM Application Server ABAP and CRM Application Server Java provide the core functions for SAP CRM, for example, in the area of Marketing, Sales, Service, Interaction Center, or CRM Web Channel scenarios. A CRM system landscape containing CRM Application Server ABAP and CRM Application Server Java already enables you to operate a large range of business processes. To run further processes, you can enhance this basic system landscape with other software units. You can, for example, use CRM Mobile Components to enable the use of marketing, sales, and service functionality in an offline environment or use SAP Business Warehouse for analytics.

The detailed structure of CRM Core is as follows:

- **CRM Application Server ABAP**
  CRM Application Server ABAP provides the core functions of Marketing, Sales, Service, and Interaction Center scenarios. For CRM Web Channel scenarios, you also need CRM Application Server Java.
  CRM Application Server ABAP consists of the following software components:
  - CRM PLUS 7.14
  - MDG FOUNDATION 749
  - SAP AP 7.50 (includes IPC)
  - SAP CRM ABAP 7.14
  - SAP NetWeaver 7.5 – Application Server ABAP
  - SAP WEB UIF 748
  - SAP_BS_FOUNDATION 748

- **CRM Application Server Java**
CRM Application Server Java consists of the following software components:

- CRM JAVA APPLICATIONS 7.54
- SAP JAVA DATA DICTIONARY 7.54
- SAP SHARED JAVA APPLIC. 7.54
- SAP NetWeaver 7.5 – Application Server Java

**Caution**

The CRM Web Channel components included with SAP CRM 7.0 EHP4 are only supported with SAP NetWeaver 7.5. As a consequence, upgrading your Java components from an older EHP of SAP CRM implicitly requires upgrading SAP NetWeaver as well.

Portal components included in product instances **CRM Portal Content** and **CRM Portal Content Core** are not affected. These Java components also run on SAP NetWeaver 7.31 and 7.4.

- **NWDI Design/Build Time Content**

Product instance NWDI Design/Build Time Content is not supposed to be deployed on an application server. It contains all software components that are required for building CRM Web Channel applications within NWDI.

- APACHE STRUTS 1.1
- CRM JAVA APPLICATIONS 7.54
- CRM JAVA COMPONENTS 7.54
- CRM JAVA WEB COMPONENTS 7.54
- SAP JAVA DATA DICTIONARY 7.54
- SAP SHARED JAVA APPLIC. 7.54
- SAP SHARED JAVA COMP. 7.54
- SAP SHARED WEB COMPONENTS 7.54

**Note**

Up to and including SAP CRM 2007, the software components listed for NWDI Design/Build Time Content had been part of CRM Application Server Java.

---

**Using CRM Core with and without CRM Application Server Java**

You can distinguish between the following:

- CRM Core with CRM Application Server Java
- CRM Core without CRM Application Server Java

For some processes of the business scenarios, you do not need to install CRM Application Server Java because these business scenarios run with CRM Application Server ABAP only. Some business scenarios and applications need to have all core functions, both CRM Application Server ABAP and CRM Application Server Java. For the following business scenarios, you must have installed CRM Core with CRM Application Server Java:

- CRM Web Channel
- Business scenarios in which you want to use product configuration, for example, the business process **Sales Order Processing (Configure-to-Order)** in CRM.
You only need to install SAP NetWeaver Application Server Java for the following applications:

- SAP NetWeaver Exchange Infrastructure

The Internet Pricing and Configurator (IPC) functions for pricing have been integrated in the Virtual Machine Container (VMC) as of SAP NetWeaver 7.0. You no longer have to install SAP NetWeaver Application Server Java to run the Java applications for pricing, since these are now processed on SAP NetWeaver Application Server ABAP only.

To use the product configuration functions, you additionally need to install SAP NetWeaver Application Server Java (part of CRM Application Server Java) to display the product configuration UI. To use the functions for product configuration, you have to perform the necessary configuration steps.

**i Note**

For scenarios in which you use pricing, you have to activate the Virtual Machine Container (VMC), which is a prerequisite for running pricing. For information about activating VMC, see SAP Note 854170.

The installation program SAPinst can install CRM Application Server ABAP and the underlying SAP NetWeaver Application Server ABAP in a single installation run. The same applies to CRM Application Server Java and the underlying SAP NetWeaver Application Server Java. Carry out 2 installation runs, one for ABAP and one for Java, and make sure that 2 different system IDs (SID) are used.

**WebClient UI**

The WebClient UI is an integrated, clearly arranged, and Web-based user interface. It is the only supported user interface for business functions in SAP CRM. The following areas are exceptions because different user interfaces are available:

- Mobile applications
- CRM Web Channel
- Product configuration
- Native portal iViews
- Business Intelligence (BI) content

The SAP Graphical User Interface (SAP GUI) is only supported for administrative tasks (for example, for Customizing activities, middleware configuration, and for business transactions used for administrative tasks). For more information about SAP GUI, see the section on SAP GUI that follows. The People-Centric User Interface is no longer supported.

For information about the Web browsers supported, see the Product Availability Matrix (PAM) at [https://support.sap.com/release-upgrade-maintenance/pam.html](https://support.sap.com/release-upgrade-maintenance/pam.html).

The Web-based user interface offers the following benefits:

- Clearly arranged page layout
- Flexible and easy-to-use interface configuration
- Simple and intuitive navigation
- Easy-to-use personalization
- Enhanced search concept
- Toolbar for functions
The CRM Web Channel application has not been integrated into the WebClient UI. This application uses its own user interface based on Java. For more information about CRM Web Channel and accessing this application, see the guides on SAP Service Marketplace at http://service.sap.com/crm-inst/chooserelease>.

Components of the WebClient UI

The WebClient UI runs within a Web browser, so you only have to install a Web browser on the client side. You can use functions from all CRM application areas in a single user interface. An SAP GUI is not necessary. The WebClient UI is fully based on CRM Application Server ABAP using business server page (BSP) technology.

On the server side, the WebClient UI is based on a multilayer architecture. It consists of the following components:

- **Presentation layer**
  
  The business server pages (BSPs) are the presentation layer of the WebClient UI. They are the basis for the HTML pages.

- **Business layer**

  Data of business objects, such as business partners, products, and transactions are processed by the business layer of the WebClient UI. The business layer comprises the following parts:
  
  - **Business object layer (BOL)**
    
    The BOL stores the business object data at runtime of a WebClient UI session. It ensures the separation of the user interfaces and the underlying business logic.
  
  - **Generic interaction layer (GenIL)**

    The GenIL processes the data transfer from the BOL to the application programming interfaces (APIs) of the underlying CRM business engine, that is, application logic and database tables. The GenIL connects the BOL to the underlying business logic and database.

Internet Communication Framework

The Internet communication framework (ICF) services that are used to communicate between the Web browser and the BSP runtime are installed automatically as part of SAP NetWeaver Application Server. The WebClient UI requires relevant ICF Services.

You have to activate all subservices (transaction SICF) under the following nodes:

- default_host/sap/bc/bsp/sap
- default_host/sap/crm

If you have activated all the necessary ICF services you do not have to do anything else for the interaction center scenarios.

For more information about activating the ICF services for the WebClient UI (transaction SICF) after the installation, search for Activating and Deactivating ICF Services in the documentation at http://help.sap.com/.

The WebClient UI can be accessed using a Uniform Resource Locator (URL). The URL of the WebClient UI has the following structure (default configuration):

http://<Host Name>.<Domain Name>.<Extension>:<Port Number>/sap/bc/bsp/sap/crm_ui_frame/default.htm

**Note**

WebClient UI supports single sign-on (SSO) by using the standard SAP NetWeaver SSO functionality. There is no WebClient UI-specific SSO installation process.

**SAP NetWeaver Portal and Business Package**

Though SAP NetWeaver Portal is not delivered with SAP CRM, you can integrate the WebClient UI in an already installed SAP NetWeaver Portal (The minimum release is NetWeaver 7.40. For more information, see SAP Note 1648480). The required content is delivered in business package components. The business package provides employees with central access to data and information they require for their daily work. The business package contains the following roles:

- **Channel Manager** (ep.bp.crm.chm-cm.CHM-CM)
- **Partner Manager** (ep.bp.crm.chm-pm.CHM-PM)
- **Channel Manager (Telecommunications)** (com.sap.pct.ist.tdm.TEL-CM)
- **Partner Manager (Telecommunications)** (com.sap.pct.ist.tdm.TEL-PM)
- **Customer** (ep.bp.crm.cst)

You can upload the business roles created in the WebClient UI to SAP NetWeaver Portal.

For more information about portal integration, see the following:

- Customizing for Customer Relationship Management under [UI Framework > Portal Integration > Overview](http://help.sap.com/crm)<choose release>

The business packages for the releases SAP CRM 3.1, 4.0, and 5.0 cannot be used in this release because they only run in the People-Centric UI. You cannot reuse the business roles that you have created in the People-Centric UI.

If you use the current release with SAP NetWeaver Portal, use SAP Web Dispatcher for load balancing. For more information, see SAP Note 1040325.

**UI Configuration**

You can also configure the user interface of the current release yourself with the configuration tool, by showing, hiding, renaming, or regrouping page fields, for example.

To adapt the WebClient UI to your corporate identity, a bundle of integrated tools is provided. These tools support the UI configuration in an efficient and integrative way, by providing, for example, the following functions:

- Adding new fields and tables to business objects
- Positioning fields on views
- Renaming field labels
- Using personalization
- Defining captions
- Defining navigation bar entries
- Creating business roles
The CRM UI configuration tool is an easy to use tool for adjusting the CRM standard views to your needs. For example, project team members or consultants can adjust the UI and use the tool for the following activities:

- Configuring pages
- Configuring blocks
- Configuring fields

**Custom UI Enhancements**

As a prerequisite for keeping your custom UI enhancements valid and functional after upgrading, use the following tools available in the WebClient UI framework:

- Checking general consistency
  In Customizing for Customer Relationship Management, choose **UI Framework** > **UI Framework Definition** > **Perform WebClient UI Framework Checks** to analyze the consistency of UI repository data and configuration data. If errors are detected, you can navigate from the error messages to the affected system objects.

- Checking runtime repositories
  In Customizing for Customer Relationship Management, choose **UI Framework** > **UI Framework Definition** > **Compare Runtime Repositories** to compare the runtime repository of an enhanced UI component with the SAP standard runtime repository.

These tools support you in finding issues that may invalidate your custom UI enhancements. Depending on the results of the checks, reworking and adapting the custom implementation of UI enhancements may be required.

**SAP GUI**

SAP GUI is used for system administration functions and maintaining application Customizing. Some administrative transactions are still available on SAP GUI, and accessible from SAP Easy Access Menu. They are excluded from the UI migration.

**Caution**

The People-Centric UI (PC UI) is no longer supported.

You can use SAP GUI for Windows or SAP GUI for Java.

For information about the SAP GUI, see the following:

- **Master Guide SAP NetWeaver 7.5** available on SAP Service Marketplace at [http://service.sap.com/instguidesNW75](http://service.sap.com/instguidesNW75) under **Installation** > **Planning**

**4.2.2 CRM Mobile Client Component**

This group consists of a range of components that enable you to use marketing, sales, and service functions on a laptop. Most of the components are based on Microsoft .NET technology, some use Microsoft Component Object Model (COM) technology. Microsoft Installers are used for the installation.
Structure of CRM Mobile Client Component

The CRM Mobile Client application consists of the following software components:

- CRM Mobile Application Studio – CRM MAS 5.0
- CRM Mobile Application Repository – CRM MAR 7.01
- CRM Authorization Management Tool – CRM AMT 7.01
- CRM COMMUNICATION STATION 5.0
- CRM MOBILE CLIENT 7.01
- MOB. CLIENT COMPANION 7.01 (optional)
- PLANOGRAM (STRATEGIX) 5.0

Components and Their Use

Mobile Client

Field sales users have special mobile client software and an Internet Pricing and Configurator (IPC) on their laptops, which enable them to work offline. The IPC is automatically installed during the CRM Mobile Client setup.

The mobile client applications run on a Microsoft SQL database or Microsoft data engine. They comprise Mobile Sales High Tech (standard), Mobile Sales Consumer Goods, Mobile Sales Pharma, and Mobile Service.

⚠️ Caution

Due to synchronization issues, you cannot use groupware integration between the CRM server and the groupware server at the same time as using client synchronization. You can only choose one of these integration possibilities.

Mobile Application Studio

The Mobile Application Studio (MAS) must be installed on the mobile development workstation. It is an object-oriented, visual development tool that is tailored to the architecture of SAP mobile client applications. It allows you to customize mobile client applications, delivered by SAP, according to your specific business requirements, or develop your own applications.

Mobile Application Repository

The metadata of a mobile client application is delivered as the Mobile Application Repository (MAR). This repository must be installed on the Mobile Repository Server (MRS) for each environment. Application developers working on individual mobile development workstations establish a connection with the MAR from MAS.

Authorization Management Tool

The Authorization Management Tool (AMT) can be installed on the mobile development workstation, as well as on a separate system. It needs access to the Mobile Application Repository and the client framework. It enables you to define authorizations (access rights) for mobile client users, for example, sales representatives, to use a mobile client application such as Mobile Sales. You can define access rights to underlying objects, such as the application, business components, tile sets, tiles, business objects, and properties of business objects.

Communication Station
The Communication Station connects mobile clients with the CRM server. Mobile clients from inside and outside the firewall connect to the Communication Station for data exchange. The Communication Station itself establishes the connection to the CRM server.

### Installation of CRM Mobile Client Component

The installation of mobile client components requires certain .NET installations. For more information, see the installation guide for mobile clients on SAP Service Marketplace at [http://service.sap.com/crm-inst](http://service.sap.com/crm-inst) <choose release> Install

You must install the software on the different systems that make up the mobile system landscape, as described below:

<table>
<thead>
<tr>
<th>System</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile Application Repository server</td>
<td>Server designated for the central Mobile Application Repository and test application database</td>
</tr>
<tr>
<td>Mobile Application Studio server</td>
<td>Server, PC, or laptop designated for customizing and designing the mobile client applications and for assigning user access definitions and templates, if required, for using these applications</td>
</tr>
<tr>
<td>Mobile client</td>
<td>Server, PC, or laptop that sales and service people use for their work</td>
</tr>
<tr>
<td>Workgroup server</td>
<td>Server designated for storing the central database to which the workgroup clients connect. The server is connected to the CRM server via the Communication Station.</td>
</tr>
<tr>
<td>Workgroup client</td>
<td>PC or laptop that connects to the workgroup server to use the same database concurrently</td>
</tr>
</tbody>
</table>

For a complete landscape, a Communication Station, a back-end server (for example, an ERP system), and a CRM server are also required.

#### 4.2.3 Workforce Deployment

You use Workforce Deployment for running the business process Service Resource Planning in CRM.

The following software units are used in the area of Workforce Deployment:

- Workforce Deployment (WFMCORE 200 Add-On): You have to install this add-on on the CRM server ABAP by using the SAP Add-On Installation Tool (SAINT). For more information, see SAP Notes [830595](http://service.sap.com/notes) and [836414](http://service.sap.com/notes).

  The component version needed is WFMCORE 2.00 SP13.

- SAP liveCache (SAP LC/LCAPPS 7.0) is a database engine for managing complex objects in scenarios where large volumes of data must be permanently available and modifiable. It is an optional component that you only
need for high volume capacity-based planning, running of scheduling strategies, and workload balancing. SAP liveCache is installed by using SAPinst.

- **SAP cProject Suite (CPRXRPM 400)**
  The minimum component version needed is CPRXRPM 400 SP11.

- **SAP Visual Business** is a user interface technology that you can use to visualize data from SAP and external data sources on a single screen. If you use map integration in resource planning application, then front-end installation of SAP Visual Business 2.0 is required. For more information, see the installation guide and master guide for SAP Visual Business in the SAP Service Marketplace at [https://service.sap.com/instguides](https://service.sap.com/instguides).

### 4.2.4 Standalone Components

#### Search and Classification (TREX)

SAP NetWeaver Search and Classification (TREX) offers an integrated set of services. TREX services include search and retrieval in large document collections, text mining, automatic document classification, and search and aggregation over structured data in SAP applications. TREX can handle text from documents in numerous formats, including Microsoft Office and Adobe formats (PDF), and in more than 30 languages. TREX search options, such as exact, boolean, fuzzy, or linguistic search, and classification options, such as query-based or example-based classification, offer great power and flexibility to end users.

**Recommendation**

For performance reasons, we recommend that you install TREX on a separate host.

Check the hardware requirements carefully. They depend largely on your individual needs. The size and number of indexes, number of updates and inserts per day, number of parallel search activities, your backup, and high availability strategy and other factors strongly influence the hardware requirements.

Note that if you run SAP CRM on the SAP HANA database, you can use the local TREX functionality of SAP HANA.

#### Groupware Connector (Server Based Groupware Integration)

Groupware Connector provides access to important business information created in SAP CRM in the most widely used groupware systems: Microsoft Exchange Server and Lotus Domino. This version of Groupware Connector allows a server-based, two-way replication of CRM business partners, contact persons, and activities with the groupware contacts, appointments, and tasks. After an item is created, changed, or deleted in SAP CRM, the changes are sent to Groupware Connector, which forwards them to the users’ mailboxes. Users can immediately see changes in their mailboxes by using their favorite groupware client application, such as Microsoft Outlook or Lotus Notes. This increases employee productivity, because employees can now see calendar entries received from colleagues via the groupware server as well as business meetings with customers that have been created in SAP CRM. Users can view contacts mapped from CRM business partners in their groupware client or can quickly find a customer telephone number without starting the CRM client.
Desktop Connection for SAP CRM

Desktop Connection for SAP CRM is a more recent alternative for Groupware Connector. Desktop Connection for SAP CRM enables you to synchronize accounts, contacts, appointments, opportunities, leads, tasks, and emails between the personal information management (PIM) applications Microsoft Outlook and IBM Notes, depending on the installed edition (professional or enterprise). The user can access the relevant data that has been created in SAP CRM from the PIM application. Objects can be synchronized in both directions. An OData service is provided by SAP that allows Desktop Connection for SAP CRM to access the SAP CRM business objects. The OData service is implemented as an SAP Gateway service.

Desktop Connection for SAP CRM consumes the data described above through scheduled and manual data synchronization between SAP CRM and the PIM storages, ensuring changes are correctly reflected on both sides.

Finbasis for CRM

Finbasis for CRM is an optional SAP add-on that can be either installed on top of either SAP ERP or SAP CRM. This add-on includes the Financial Supply Chain Management (FSCM) applications SAP Dispute Management and Collections Management, which extend the SAP ERP Financials capabilities.

These applications add extra functionality to the Shared Service Center business scenario available with the SAP CRM Interaction Center. To use these applications, you may simply deploy this software unit on top of your SAP CRM system, without having to upgrade your SAP ERP system.

SAP Real-Time Offer Management

SAP Real-Time Offer Management (RTOM) is an SAP solution extension that acts as a real-time decision support framework, providing intelligent product offers and marketing messages during inbound customer interactions. The solution is self-learning, leveraging the response from every interaction to make the next offer more relevant and effective. You can use SAP Business Warehouse reports and xCelsius dashboards to analyze offer performance, channel performance, response profiles, and more.

For more information, see SAP Service Marketplace at http://service.sap.com/instguides, under SAP Solution Extensions > SAP Real-Time Offer Management.

4.2.5 Application Systems

SAP ERP

SAP ERP is connected to the CRM server as a back-end system and provides additional business functions such as materials management and financials.

The data exchange includes an initial transfer of Customizing, master data, and transactional data to the CRM system, as well as delta data for master data and transactional data in both directions.
SAP Supply Chain Management Server

The SAP Supply Chain Management (SCM) server consists of tools for real-time planning and decision support. For example, the SCM server performs product availability checks for sales orders.

SAP Business Warehouse

SAP Business Warehouse (SAP BW) is used to provide infrastructure for:

- Data warehousing
- Various analytical technologies and functions
- Web-based reporting and analysis
- Information broadcasting to distribute BI Content by e-mail or by using the portal either as precalculated documents with past data, or as links with live data
- Open analysis interfaces that make available various interfaces for connecting front-end tools of third-party providers
- Web design API that allows you to realize highly individual scenarios and demanding applications with customer-defined interface elements
- Business Planning and Simulation (BPS) allows you to set up complex planning sheets (for example, in marketing or trade promotion planning).

In SAP CRM, SAP BW is mainly used for analytics processes. It enables you to gather all the relevant data about various key factors (for example, customers, sales, services, marketing campaigns) and analyze this knowledge base to deploy important insights derived from it in your operational and strategic decision-making.

BI Content is a preconfigured set of role and task-related information models that are based on consistent metadata in SAP BW. BI Content provides selected roles within a company with the information they need to carry out their tasks. BI Content is delivered as an add-on to SAP BW.

CRM Interactive Reporting

You can also create, edit, and view reports directly in SAP CRM. These CRM-based reports retrieve data in real-time and are called CRM interactive reports. You create these reports in the WebClient UI using a guided wizard. You can then publish these reports to a selection of users. You can display reports in tables and charts.

Using the reports, you can analyze data in ample ways, including drilldown to individual documents. The report data is retrieved in real-time, meaning the data is always entirely up to date. You can export report data to Microsoft Excel and print reports.

Note

We recommend this type of report for reports with a low data volume. Your company’s power users can create reports of this type themselves, in addition to the ones delivered by SAP. Examples for CRM interactive reports are My Team: Closed Opportunities and My Team: Opportunity Sources.

You cannot add custom fields to CRM interactive reports. For more information, see SAP Note 1110780.

Caution

To run CRM interactive reporting, you can use the SAP BW client available with the CRM system. However, running CRM interactive reporting along with SAP BW reporting (that is, reporting using SAP Business Explorer)
on the same system is not possible. We recommend that, for SAP BW reporting, you always set up a dedicated SAP BW system. For more information, see SAP Note 1401472.

**CRM Interactive Reporting Based on SAP HANA VDM**

In addition, another technology is also available that you can use to create reports directly in SAP CRM. CRM Interactive Reporting based on SAP HANA VDM enables you to use reports and report areas for interactive reporting, which are based on virtual data models (VDM) from SAP HANA. This means you can analyze large data volumes. The restriction regarding analyses with restricted data volumes for CRM Interactive Reporting does not therefore apply here.

**SAP NetWeaver Process Integration**

SAP NetWeaver Process Integration (PI) consists of core components to model, design, automate, and integrate processes of one or multiple application systems (including internal and cross-company processes). In addition, PI contains core components for business process management for application-embedded and application-unbounded processes.

PI requires Application Server ABAP and Application Server Java to be installed in the same system. Optionally, it can be combined with other product instances in one system. Nevertheless, we recommend that you have a dedicated PI system.

![i Note](http://example.com/note)

For information about the required PI, see SAP Note 1515223 and SAP Note 1648480.

**4.2.6 SAP Solution Manager**

SAP Solution Manager supports the implementation and operation of SAP CRM. It significantly accelerates the implementation process and helps you to reach your business goals. SAP Solution Manager enables you to take advantage of SAP’s full support and continuous improvement offerings.

Using SAP Solution Manager is mandatory for SAP CRM.

![i Note](http://example.com/note)

For information about availability of content specifically tailored to your solution, see SAP Service Marketplace at http://service.sap.com/solutionmanager.

SAP Solution Manager contains standard implementation content for all SAP CRM scenarios. This enables fast implementation of the entire solution in units of business processes.

In your SAP CRM project, execute the following activities by using SAP Solution Manager:

- Documentation of core business processes that are changed or implemented during ramp-up
- Planning of your solution landscape
- Connection of existing systems and activation of SAP EarlyWatch Alert
- Setting up of Solution Manager diagnostics for root cause analysis of Java components
- Handover of processes and systems to support organization after go live
- Configuration of your scenarios according to the documentation contained in SAP Solution Manager

**Recommendation**

Configure and test the previously defined business processes.

For more information, see the following:

- For instructions for setting up SAP Solution Manager to enable end-to-end lifecycle management tasks, see Maintenance Planning Guide at [http://service.sap.com/mopz](http://service.sap.com/mopz) under the section How-To's and Guides.
- For system infrastructure, scenarios, installation, and configuration of SAP Solution Manager, see the master guide for SAP Solution Manager on SAP Service Marketplace at [http://service.sap.com/instguides](http://service.sap.com/instguides) under the section How-To's and Guides.
- For system infrastructure, scenarios, installation, and configuration of SAP Solution Manager, see the master guide for SAP Solution Manager on SAP Service Marketplace at [http://service.sap.com/instguidesNW74](http://service.sap.com/instguidesNW74) and the master guide for SAP NetWeaver 7.4 available on SAP Service Marketplace at [http://service.sap.com/instguidesNW74](http://service.sap.com/instguidesNW74) > Installation.

Note the following installation considerations:

- Each SAP CRM (or SAP NetWeaver) system landscape must be assigned to an installation of SAP Solution Manager. In the event of a support-relevant incident within your SAP system landscape, SAP support requires remote access to the SAP Solution Manager solution that hosts the affected system landscape.
- If you already have an SAP Solution Manager deployment in place, you can use it to manage the solution you built up with SAP NetWeaver and SAP CRM as well. In this case, we strongly recommend that you update SAP Solution Manager and Solution Manager content to the latest version.
- You can install multiple instances of SAP Solution Manager. In this case, each installation should host separate business solutions.
- If you want to reduce the risk of unavailability, do not install SAP Solution Manager as a central component. Instead, operate a 2-system landscape with test and production environment of SAP Solution Manager, especially if you are using time-critical functions such as support desk.

### 4.2.7 Extended Implementation Content in SAP Solution Manager

In the business process repository of SAP Solution Manager, you can find high-quality business processes under [Solutions/Applications > Extended Implementation Content for Lines of Business](http://service.sap.com/solutionmanager). These business processes are highly demanded by consultants and customers and provide optimized configuration information for various lines of business (for example, Finance, Sales, Manufacturing, and Supply Chain).

Extended implementation content for lines of business is characterized by carefully drafted configuration information, including the following:

- Configuration information is assigned to all business processes. This process-specific configuration information always contains a clear reference to additional basic configuration settings that are available for
the required components of a process. Therefore, when you include a business process in a self-defined scenario, you can easily identify all relevant configuration settings that are relevant for your project.

- Configuration information that is specific for an optional process step is directly assigned to that process step. Therefore, when you remove an optional process step from your project because you do not need it, the corresponding configuration activities are also automatically excluded from your implementation project.

For your implementation project, this means:

- With the extended implementation content, the implementation of a business process is easier than before.
- You can adjust SAP business processes to your own enterprise-specific requirements.
- You can be sure to get all required configuration information if you include an SAP business process in a self-defined business scenario.

### 4.2.8 Content Types

Some systems of your SAP CRM system landscape require you to import content to set up the systems. This content is updated on a regular basis and is available for download on SAP Support Portal. In the following, you find information about the different content types, for example, download and implementation information. The following content types are relevant for SAP CRM:

- SAP Solution Manager implementation content
- Business Intelligence Content (BI_CONT)
- System Landscape Directory (SLD) content
- XI content
- CRM Portal content
- Enterprise Service Repository content

### SAP Solution Manager Implementation Content

Business Process Repository (BPR) is the central storage place for SAP's comprehensive knowledge of implementing integrated, cross-component business scenarios. Its content complements the functions delivered with SAP Solution Manager. You can make use of this knowledge during your implementation or template project by taking the predelivered implementation content as the starting point for your project scope. The implementation content is delivered in the form of a process-oriented scenario structure, with the following information being assigned to each scenario:

- Documentation describing how to use the scenario in your business
- Transactions allowing the evaluation of the delivered scenarios
- Configuration support (ranging from Customizing activities to business configuration sets) allowing for efficient Customizing of your scenarios

The implementation content is delivered as a separate software package (ST-ICO) that has to be installed as an add-on to SAP Solution Manager. ST-ICO 150_700 SP38 for use with either SAP Solution Manager 7.0 EHP1 SP23 or SAP Solution Manager 7.1 SP04 is part of the ramp-up delivery of the current release of SAP CRM.
BI Content for SAP Business Warehouse

BI Content is delivered as an add-on that has to be installed on SAP NetWeaver Application Server ABAP. BI Content is a preconfigured set of role-relevant and task-relevant information models based on consistent metadata in SAP Business Warehouse. BI Content provides selected roles within a company with the information they need to carry out their tasks. This information model includes integral roles, workbooks, queries, InfoSources, InfoCubes, ODS objects, key figures, characteristics, update rules, and extractors for SAP ERP, SAP Business Suite software, and other applications.

There are approximately 3 add-on releases per technology release. For information about the release strategy, see SAP Note 153967.

The BI Content add-on has its own support packages that you can download from SAP Support Portal.

You can download BI Content and its support packages from the following locations:

- **Download of BI Content:**
  SAP Software Download Center > Installations and Upgrades > Browse our Download Catalog > SAP NetWeaver and Complementary Products > BI CONT

- **Download of Support Packages for BI Content:**
  SAP Software Download Center > Support Packages and Patches > Browse Download Catalog > SAP NetWeaver and Complementary Products > BI CONT

System Landscape Directory (SLD) Content

SLD content is the content for the Component Repository of the SLD. It contains information about all software components that can be installed in your landscape. After SLD implementation, you import the master data for SLD, either from DVD or from SAP Support Portal. SAP regularly delivers updates for the master data for SLD (approximately every 4 weeks).

**Download:** from SAP Support Portal at [http://support.sap.com/swdc](http://support.sap.com/swdc)>
  SAP Software Download Center > Support Packages and Patches > Browse Download Catalog > SAP Technology Components > SAP CR Content

For information about updating SLD content, see SAP Note 669669.
XI Content

The contents of the Integration Repository (part of SAP NW Process Integration) are collectively known as XI Content (Process Integration Content). XI Content is the integration knowledge that is required for describing collaborative processes (collaboration knowledge). XI Content is created at design time and can be shipped. In addition to the technical infrastructure, SAP also ships predefined XI Content to enable customers to integrate their processes as efficiently and cost-effectively as possible.

**Download:** from SAP Support Portal at [http://support.sap.com/swdc](http://support.sap.com/swdc) > SAP Software Download Center > Support Packages and Patches > Browse Download Catalog > SAP Content > ESR Content (XI Content) > XI Content BBPCRM <choose release>.

Enterprise Service Repository Content

An enterprise service is typically a series of Web services combined with business logic that can be accessed and used repeatedly to support a particular business process. Aggregating Web services into business-level enterprise services provides a more meaningful foundation for the task of automating enterprise-scale business scenarios.

Enterprise services are based on open standards. The interfaces are described according to WSDL. They are created by using global data types based on UN/CEFACT CCTS (Core Component Technical Specification). B2B enterprise services are defined in compliance with e-business standards, where applicable.

SAP has developed an advanced meta model and governance process to define and model enterprise services. Key concept is the business object model. Each enterprise service is assigned to a business object, representing a well-defined business entity or document. Each business object is assigned to a process component. Process components are pieces of software covering a well-defined set of business tasks that belong logically together and are usually executed in the same department. All identified services were modeled by SAP architects and developers in the Enterprise Services Repository (ESR), which is supported by SAP NetWeaver technology.


**Download:** from SAP Support Portal at [http://support.sap.com/swdc](http://support.sap.com/swdc) > SAP Software Download Center > Support Packages and Patches > Browse Download Catalog > SAP Content > ESR Content (XI Content) > XI Content ESM CRM <choose release>.

4.3 System Landscapes

Use

Note the following general recommendations:

- We recommend that you use SAP HANA as your database.
- You can install CRM Application Server ABAP and CRM Java Components on a common host or separately on different hosts. This applies to test systems as well as to production systems. You have to carry out 2 installation runs and make sure that ABAP and Java use 2 different system IDs (SID). If you install the ABAP and the Java system on different hosts, pay particular attention to the higher network load and plan sizing of the network accordingly.

- We recommend that you install SAP Business Warehouse (SAP BW) on a separate host from CRM Application Server ABAP. Technically, you only have to install the BI Content (BI_CONT) add-on on top of CRM Application Server ABAP. However, you have to be aware of the increased sizing requirements.

- If the CRM host is sufficiently sized, you can also install Search and Classification (TREX) on the same host. However, you have to check if this meets your security requirements.

The following figure shows an example of a typical system landscape for testing and for productive use:

![Figure 2: Example of System Landscape](image)

**Note**

When you plan your system landscape, ensure that you read the infrastructure information in the master guide for SAP NetWeaver 7.50 on SAP Service Marketplace at [http://service.sap.com/installNW75](http://service.sap.com/installNW75).

For SAP Business Suite applications as of SAP Business Suite 7 that are based on an Application Server Java and on hub systems, you can install these applications on SAP NetWeaver 7.5. You can also change from your current
release to SAP NetWeaver 7.5. Changing means upgrading or updating. The following approaches for system landscapes for SAP NetWeaver 7.5 are possible:

- You can upgrade your hub systems to SAP NetWeaver 7.5.
- Your hub systems can remain on SAP NetWeaver 7.40 or SAP NetWeaver 7.31.

More Information

SAP Note [2304435](#)

4.4 Overall Implementation Sequence

Use

This section lists the steps (installation, technical configuration, application configuration) required to implement SAP CRM business scenarios. The table below contains all available software units. However, to implement a specific scenario, you only need a subset of the software units. For information about which software is required to implement a specific scenario, see SAP Solution Manager.

There is no special installation sequence. However, if CRM Application Server ABAP and TREX are required for your solution, then you must install them before you can complete the CRM Java Components installation. This is because after the installation of CRM Java Components, you must check whether you can establish a connection to CRM Application Server ABAP and TREX.

However, further dependencies can exist between some of the subcomponents that belong to a larger software unit. For example, CRM Mobile Client Component consists of several subcomponents to which a determined installation sequence applies. These dependencies are explained in the corresponding component installation guides.

**Note**

For the latest component version and patch level requirements, see the corresponding SAP Note (Release- & Information Note (RIN)) that is available for each SAP CRM server support package stack. For more information, see SAP Note [2171335](#).
## Procedure

### Table 8:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action [Corresponding Documentation]</th>
<th>Remarks and Subsequent Steps [Corresponding Documentation]</th>
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<tbody>
<tr>
<td>1</td>
<td>Installation of SAP Solution Manager and implementation content.</td>
<td>For release and guide information, see the Solution Manager prerequisites in the Planning for Installation, Update, and Upgrade Processes [page 13] section.</td>
</tr>
</tbody>
</table>
| 2    | Installation of **Search and Classification (TREX) 7.1** Use the following parameters for the TREX installation and post-installation tasks:  
- ABAP applications access TREX functions using the TREX ABAP client and the RFC protocol. In this case you have to perform the post-installation steps to set up an RFC connection.  
- JAVA applications access TREX functions using the TREX JAVA client and the HTTP/HTTPS protocol. In this case you have to perform the post-installation steps to set up an HTTP connection.  
  Note that some applications use both the ABAP and the JAVA client. For more information, see the documentation at [http://service.sap.com/trex](http://service.sap.com/trex). | To configure TREX, see the documentation in SAP Solution Manager at [Solutions/ Applications ▶ Basic Configuration ▶ Configuration Structures ▶ SAP NetWeaver <choose release> ▶ Standalone Engines ▶ Search and Classification (TREX) ▶](http://service.sap.com/trex). The following scenarios use the TREX ABAP client:  
- **Account and Contact Management with Channel Partners**  
- **Collaborative Selling**  
- **Quotation and Order Management for Business-on-Behalf**  
- **Campaign Management in CRM Web Channel**  
- **Catalog Management in CRM**  
- **Contract Management in CRM Web Channel**  
- **Quotation and Order Management in CRM Web Channel**  
- **Web Auctions: Auctioning via Web Shop**  
- **Complaints and Returns Management in CRM Web Channel**  
- **Service Request Management**  
- **Campaign Management**  
- **Quotation and Order Management in CRM** |
<table>
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<tr>
<th>Step</th>
<th>Action [Corresponding Documentation]</th>
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</table>
| 3    | Installation of CRM Application server ABAP and CRM Application Server Java  
See the installation guides at http://service.sap.com/crm-inst <choose release> Install  | After the installation of CRM Java Components, you have to check whether you can establish a connection to the CRM Application server ABAP and TREX. Therefore, if you install CRM Application server ABAP and CRM Java Components on different hosts, ensure the ABAP installation is completed before you perform the check. |
| 4    | Preparation of an OLTP back-end system:  
- SAP R/3 or R/3 Enterprise systems as well as ECC 5.0 systems require the R/3 plug-in 2004.1 with at least SP10.  
- As of SAP ERP 6.0, the R/3 plug-in is no longer required. New and extended interfaces for integrating SAP ERP 6.0 are directly contained in SAP ERP 6.0.  
See the installation guides at http://service.sap.com/erp-inst <choose release> Installation | None |
| 5    | Setting up the CRM Mobile Client landscape:  
- Installation of the Communication Station  
  See the installation guide for the communication station at http://service.sap.com/crm-inst <choose release> Install  
- Installation of the local Microsoft SQL server on the mobile clients  
  [Third-party documentation]  
- Installation of SAP CRM Mobile Client Component (Mobile Application Studio, Mobile Application Repository, Mobile Client, AMT, CSDM) on the mobile repository server, mobile development workstations, and mobile clients  
  See the installation guide for the SAP CRM mobile client at http://service.sap.com/crm-inst <choose release> Install  
- Installation of optional third-party software | You can install SAP CRM Mobile Authorization Management Tool (AMT) on the development workstation together with the Mobile Application Studio as well as on a separate server. While you can have multiple Mobile Application Studios in your system landscape, only a single AMT installation is required. |
<table>
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<th>Step</th>
<th>Action [Corresponding Documentation]</th>
<th>Remarks and Subsequent Steps [Corresponding Documentation]</th>
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<tbody>
<tr>
<td>6</td>
<td>Installation of <strong>Groupware Connector 5.0</strong>&lt;br&gt;For more information, see the Groupware Connector guides on SAP Service Marketplace at <a href="http://service.sap.com/crm-inst">http://service.sap.com/crm-inst</a></td>
<td>None</td>
</tr>
<tr>
<td>7</td>
<td>Installation of the highest version of <strong>SAP NetWeaver Process Integration (PI)</strong> in a dedicated system and import of XI Content.&lt;br&gt;For more installation and administration information, see the guides for SAP NetWeaver on SAP Service Marketplace at <a href="http://service.sap.com/installnw75">http://service.sap.com/installnw75</a>.&lt;br&gt;Also, see the following:&lt;br&gt;- SAP Note 1515223&lt;br&gt;- SAP Note 836200&lt;br&gt;- SAP Note 1865292&lt;br&gt;- SAP Note 1574235&lt;br&gt;- SAP Note 1152640&lt;br&gt;- SAP Note 836200</td>
<td>Only required in the <em>Quotation and Order Management in CRM Web Channel</em> scenario for <em>Sales Order Processing One-Step-Business in CRM Web Channel</em>.</td>
</tr>
<tr>
<td>8</td>
<td>Installation of <strong>SAP Business Warehouse (SAP BW) 7.02 with BI Content 7.05 (or higher):</strong>&lt;br&gt;1. Install an SAP NetWeaver system with software unit AS-ABAP, using SAPinst.&lt;br&gt;2. Configure the database of your AS-ABAP system for SAP BW.&lt;br&gt;3. Install BI Content on the AS-ABAP system.</td>
<td>None</td>
</tr>
<tr>
<td>9</td>
<td>Installation of <strong>SAP SCM Server 7.0</strong>&lt;br&gt;For more installation information, see the guides for SAP SCM on SAP Service Marketplace at <a href="http://service.sap.com/instguides">http://service.sap.com/instguides</a></td>
<td>Optional</td>
</tr>
<tr>
<td>10</td>
<td>Installation of <strong>Frontend GUIs</strong> on every host from which you want to connect to your SAP CRM system&lt;br&gt;For more installation information, see the installation guide for the SAP front end on SAP Service Marketplace at <a href="http://service.sap.com/installnw75">http://service.sap.com/installnw75</a></td>
<td>None</td>
</tr>
</tbody>
</table>
### 4.5 Overall Upgrade Sequence

**Use**

This chapter is only relevant for you if you run an SAP CRM system with a version lower than SAP CRM 7.0, such as SAP CRM 5.0, 5.2, or 2007. In this case, we recommend that you combine the upgrade with the implementation of SAP enhancement packages. For more information about the necessary upgrade steps and relevant references, see this section. For more information about the possible upgrade scenarios and the combination with SAP enhancement package installation, see *Installation and Upgrade of SAP Enhancement Packages* [page 8].

- To upgrade from SAP CRM 5.2 or SAP CRM 2007 to the current release, you must use the Software Update Manager (SUM) tool. Ensure that you perform a dual stack split before upgrading. For more information about splitting SAP dual-stack systems based on SAP NetWeaver, see SAP Note 1655335 and SAP Note 1797362.

- To upgrade from SAP CRM 5.0 to the current release, you can use the tools mentioned above for most components. For some components, an upgrade is not possible; they must be migrated. This is due to the fact that as of SAP CRM 5.2, the people-centric UI (PC UI) is no longer supported, and the WebClient UI was introduced as the standard user interface. A technical upgrade to the new UI is not possible. For more information about migration, see *Migration from SAP CRM 5.0 to SAP CRM 7.0 EHP4* [page 53]. The business packages for SAP CRM 5.0 cannot be used in the current release because they only run on the PC UI.

You can upgrade all software units mentioned below in parallel. However, dependencies can exist between some of the subcomponents that belong to a larger software unit. For example, CRM Mobile Client Component consists of

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<tbody>
<tr>
<td>11</td>
<td><strong>Configuration</strong> of your business scenario and processes as described in SAP Solution Manager</td>
<td>None</td>
</tr>
</tbody>
</table>

Start the configuration only after you have installed all of the required software units.

After the installation, copy the delivery Customizing to your test clients. For more information about copying the delivery Customizing for SAP CRM, see SAP Note 337623.

For more information about copying the delivery Customizing for SAP NetWeaver, see the following SAP Notes:

- SAP Note 1751237
- SAP Note 1563579

**i Note**

To ensure that you have the most current information about SAP product versions, including availability and end of maintenance dates, upgrade paths, and technical release information, see the SAP Product Availability Matrix at [https://service.sap.com/sap/support/pam](https://service.sap.com/sap/support/pam).
several subcomponents to which a specific upgrade sequence applies. These dependencies are explained in the corresponding component upgrade guides.

Further reference: **Versions**: For the latest component version and patch level requirements, see the corresponding SAP Note (Release- & Information Note (RIN)) that is available for each SAP CRM server support package stack. For more information, see SAP Note [2171335](http://service.sap.com/instSAPNetWeaver\release>SAPNetWeaver\release>Installation).  

### Procedure

Table 9:

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<tr>
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<td>For release and guide information, see the Solution Manager prerequisites in the Planning for Installation, Update, and Upgrade Processes [page 13] section.</td>
</tr>
</tbody>
</table>
| 2    | Upgrade of Frontend GUIs  
For more installation information, see the installation guide for the SAP front end on SAP Service Marketplace at [http://service.sap.com/instSAPNetWeaver\release>SAPNetWeaver\release>Installation\Installation\-\-Clients](http://service.sap.com/instSAPNetWeaver\release>SAPNetWeaver\release>Installation\Installation\-\-Clients). | You can upgrade the front-end software as soon as you receive the upgrade package.  
For information about supported SAP GUI releases, see SAP Note [147519](http://service.sap.com/instSAPNetWeaver\release>SAPNetWeaver\release>Installation\Installation\-\-Clients). |
| 3    | Upgrade of CRM Application Server ABAP and CRM Application Server Java  
See the upgrade and update guides at [http://service.sap.com/crm-instr\choose\release>Upgrade](http://service.sap.com/crm-instr\choose\release>Upgrade). | None |
| 4    | Upgrade of SAP NetWeaver Search and Classification (TREX) to version 7.10.  
For more information about upgrading TREX, see the documentation at [http://service.sap.com/trex](http://service.sap.com/trex). | None |
| 5    | Installation of SAP NetWeaver liveCache  
For more information, see the guides for SAP Net-Weaver on SAP Service Marketplace at [http://service.sap.com/instSAPNetWeaver\release>SAP\NetWeaver\release>Installation\Installation\-\-Standalone Engines](http://service.sap.com/instSAPNetWeaver\release>SAP\NetWeaver\release>Installation\Installation\-\-Standalone Engines). | None |
<table>
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<th>Remark / Subsequent Step</th>
</tr>
</thead>
</table>
| 6    | Update of **Groupware Connector** to version 7.50  
For more information, see the Groupware Connector guides on SAP Service Marketplace at [http://service.sap.com/crm-instr](http://service.sap.com/crm-instr)  
<choose release>  
<install> | None |
| 7    | Upgrade of **SAP Business Warehouse (SAP BW)** to version 7.50  
For information about upgrading SAP BW, see the upgrade information at [http://service.sap.com/bwa](http://service.sap.com/bwa) | None |
| 8    | Upgrade of **SAP SCM Server** to version 7.3  
For more upgrade and update information, see the guides for SAP SCM on SAP Service Marketplace at [http://service.sap.com/instguides](http://service.sap.com/instguides)  
**SAP Business Suite Applications**  
**SAP SCM**  
**SAP SCM Server**  
<choose release> | Optional |

After the upgrade, copy the delta delivery Customizing to your test clients. For more information about copying the delivery Customizing for SAP CRM, see SAP Note **337623**.

For more information about copying the delivery Customizing for SAP NetWeaver, see the following SAP Notes:

- SAP Note **1751237**
- SAP Note **1563579**

**Note**

To ensure that you have the most current information about SAP product versions, including availability and end of maintenance dates, upgrade paths, and technical release information, see the SAP Product Availability Matrix at [https://service.sap.com/sap/support/pam](https://service.sap.com/sap/support/pam).
5 SAP HANA

5.1 Getting Started with SAP HANA

Related Information

For information about implementation topics not covered in this guide, see the content in the following table:

<table>
<thead>
<tr>
<th>Content</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sizing, calculation of hardware requirements – such as CPU, disk and</td>
<td><a href="https://service.sap.com/sizing">https://service.sap.com/sizing</a></td>
</tr>
<tr>
<td>memory resource – with the Quick Sizer tool</td>
<td><a href="http://service.sap.com/quickSizer">http://service.sap.com/quickSizer</a></td>
</tr>
<tr>
<td>Released platforms and technology-related topics such as maintenance</td>
<td><a href="https://service.sap.com/platforms">https://service.sap.com/platforms</a></td>
</tr>
<tr>
<td>strategies and language support</td>
<td>To access the Platform Availability Matrix directly, enter</td>
</tr>
<tr>
<td></td>
<td><a href="https://support.sap.com/pam">https://support.sap.com/pam</a></td>
</tr>
<tr>
<td>Network Security</td>
<td><a href="https://service.sap.com/security">https://service.sap.com/security</a></td>
</tr>
<tr>
<td></td>
<td><a href="https://service.sap.com/securityguide">https://service.sap.com/securityguide</a></td>
</tr>
<tr>
<td>High Availability</td>
<td><a href="http://www.sdn.sap.com/irj/sdn/ha">http://www.sdn.sap.com/irj/sdn/ha</a></td>
</tr>
<tr>
<td>Performance</td>
<td><a href="https://service.sap.com/performance">https://service.sap.com/performance</a></td>
</tr>
<tr>
<td>Information about Support Package Stacks, latest software versions</td>
<td><a href="https://support.sap.com/sp-stacks">https://support.sap.com/sp-stacks</a></td>
</tr>
<tr>
<td>and patch level requirements</td>
<td></td>
</tr>
<tr>
<td>Information about Unicode technology</td>
<td><a href="https://service.sap.com/unicode">https://service.sap.com/unicode</a></td>
</tr>
<tr>
<td></td>
<td><a href="http://www.sdn.sap.com/irj/sdn/i18n">http://www.sdn.sap.com/irj/sdn/i18n</a></td>
</tr>
<tr>
<td>Information on SAP HANA</td>
<td><a href="http://help.sap.com/hana_platform">http://help.sap.com/hana_platform</a></td>
</tr>
</tbody>
</table>
Further Useful Links

The following table lists further useful links:

Table 11:

<table>
<thead>
<tr>
<th>Content</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAP Notes search</td>
<td><a href="http://support.sap.com/notes">http://support.sap.com/notes</a></td>
</tr>
<tr>
<td>SAP Software Distribution Center (software download and ordering of software)</td>
<td><a href="http://support.sap.com/swdc">http://support.sap.com/swdc</a></td>
</tr>
<tr>
<td>SAP Online Knowledge Products (OKPs) – role-specific learning maps</td>
<td><a href="http://service.sap.com/ektp">http://service.sap.com/ektp</a></td>
</tr>
<tr>
<td>Additional information on SAP HANA</td>
<td><a href="http://www.saphana.com/">http://www.saphana.com/</a></td>
</tr>
</tbody>
</table>

Related Guides

You can find more information about the relevant applications in the following documents:

Table 12:

<table>
<thead>
<tr>
<th>Guide</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upgrade and Update Guides for SAP CRM</td>
<td><a href="http://service.sap.com/crm-inst">http://service.sap.com/crm-inst</a></td>
</tr>
<tr>
<td>Guides for SAP HANA</td>
<td><a href="http://help.sap.com/hana_platform">http://help.sap.com/hana_platform</a></td>
</tr>
</tbody>
</table>
Important SAP Notes

You must read the SAP Notes about SAP HANA before you start the implementation (see SAP Notes [page 94]). These SAP Notes contain the most recent information on the implementation, as well as corrections to the implementation documentation.

5.2 Technical System Landscape with SAP HANA

With the introduction of SAP HANA, you can migrate both your ABAP and JAVA stacks to SAP HANA on SAP NetWeaver 7.50. However, if you want to use the hub or sidecar deployment option for your JAVA stack, then your Java servers can still run on another database with SAP NetWeaver 7.30 or higher. Your SAP NetWeaver release must be 7.30 or higher to meet the interoperability requirements of SAP NetWeaver. You do not need to apply any additional SP stack on the technical instance defined as hub if your JAVA instance is greater than or equal to the defined minimum SP stack level.

**Note**


**Note**

Based on the landscape pattern (hub system or sidecar system) defined in SAP Solution Manager System Landscape for the JAVA system, the Maintenance Planner determines the corresponding SAP NetWeaver SP stack. For more information, see SAP Note 1620472.

Technical Usages

The following table explains the technical usages and assigned product instances available with this enhancement package of SAP CRM 7.0:

<table>
<thead>
<tr>
<th>Technical Usage</th>
<th>Product Instance</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRM Application Server ABAP</td>
<td>CRM Application Server ABAP</td>
</tr>
<tr>
<td>XI/ESR Content</td>
<td>XI/ESR Content</td>
</tr>
</tbody>
</table>
Implementation Considerations

It is possible to run this enhancement package for SAP CRM 7.0 on a non-SAP-HANA database. However, note that with this deployment option you might not be able to benefit from all available optimizations. Therefore, we strongly recommend that you use an SAP HANA database.

This enhancement package for SAP CRM 7.0 currently targets the server installations of CRM Server only. In turn, you will not be able to update a CRM Server that comprises the add-on Financials Basis for CRM to the software stack for this enhancement package for SAP CRM 7.0.

For a complete list of all technical usages available with this enhancement package for SAP CRM 7.0, see the preceding section for technical usages.
6 Migration from SAP CRM 5.0 to SAP CRM 7.0 EHP4

This documentation describes the functional migration from SAP CRM 5.0, taking the new user interface WebClient UI into account.

**Note**

SAP GUI is only supported for administrative tasks. The People-Centric UI (PC UI) is no longer supported. Therefore, consider the following:

- If you upgrade from SAP CRM 5.0, a technical upgrade is available, but an automatic UI migration of customer-specific UIs (including the underlying UI-related coding) is not possible.
- If you upgrade from SAP CRM 5.2 or 2007 to the current release, an upgrade is available and the customer-specific UIs remain intact and unchanged.

This section covers the migration from SAP GUI and People-Centric UI (PC UI) to the new WebClient UI and describes functional enhancements and restrictions in the current release compared with SAP CRM 5.0.

**Note**

This section does not provide a complete inventory of functional changes between SAP CRM 5.0 and the current release. If you require detailed information about the changes between these releases, you can do the following:

- See the release notes for SAP CRM 5.0 (see SAP Service Marketplace at [http://service.sap.com/releasenotes](http://service.sap.com/releasenotes) > SAP Solutions > SAP Customer Relationship Management > Release Notes SAP CRM 5.0 (SP 07)).
- See the functional enhancements and restrictions of the current release that are listed in this section.

**What Are the Main Upgrade Activities?**

The upgrade to the current release consists of the following activities:

- Technical upgrade
- Application component upgrade
- Functional migration
How is the Migration Information Structured?

The migration information from the different key capabilities is based on the same template containing the following sections:

- Functional enhancements in the current release compared with SAP CRM 5.0
- Functional restrictions in the current release compared with SAP CRM 5.0
- Migration activities, including SAP Notes that you need to refer to

**Note**

For most of the business transactions, you need to apply SAP Note 1037748, which describes how to display fields in the WebClient UI that have been enhanced in Easy Enhancement Workbench (EEW).

For more information about the browsers that support this release of SAP CRM, see SAP Note 1876371.

**Recommendation**

Use a higher memory threshold if you run business scenarios that need more memory space. For standard business scenarios, we recommend a memory threshold of 70 MB. For business scenarios in marketing or trade promotion management, we recommend a memory threshold of 100 MB.

You can enter the memory threshold in Customizing for Customer Relationship Management under UI Framework ➤ Technical Role Definition ➤ Define Technical Profile.
6.1 Master Data

6.1.1 Accounts and Contacts

Enhancements

The following table provides a comparison between SAP CRM 5.0 and the current release:

Table 14:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Enhancement in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts</td>
<td>Not available</td>
<td>Introduction of a life cycle stage for the account; the fields on the user interface depend on the user’s selection.</td>
</tr>
</tbody>
</table>

**Example**

If you select *Prospect*, you see different fields and assignment blocks to those you see if you select *Customer*.

Field-like and table-like enhancements are generated with Easy Enhancement Workbench (EEW).

| Field-like and table-like enhancements are generated with Easy Enhancement Workbench (EEW). | SAP GUI, PC UI | The generation of BOL and WebClient UI requires a deep regeneration as well as the update of generated coding. This is triggered by starting the wizard for the enhancement again and running through all steps without making any changes. |

**Note**

Do not click the *Generate* button instead since this will produce syntax errors in generated coding.

UI enhancements

| UI enhancements | SAP GUI, PC UI | Label positioning is possible using configuration. You can display and hide additional fields from a pool of fields of the business object. |

SAP GUI, PC UI

**Label positioning is possible using configuration.**

You can display and hide additional fields from a pool of fields of the business object.
Restrictions

The following table provides a comparison between SAP CRM 5.0 and the current release:

Table 15:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Restriction in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field-like and table-like enhancements are generated with Easy Enhancement Workbench (EEW).</td>
<td>SAP GUI, PC UI</td>
<td>Business data toolset (BDT) not supported (not reusable) in this release; therefore, field and screen modification has changed.</td>
</tr>
<tr>
<td>Postal validation</td>
<td>SAP GUI, PC UI</td>
<td>If a customer uses third-party software for postal validation, the implementation of interfaces for postal validation pop-ups is necessary.</td>
</tr>
</tbody>
</table>

Migration Activities

Field-Like and Table-Like Enhancements

Regeneration is necessary for generation of BOL and WebClient UI.

UI Enhancements

Modification-free configuration with the UI configuration tool

New Enhancement Spots

To implement account and contact functionality in the WebClient UI, you can use the new enhancement spots `CRM_UIU_BP_ENHANCEMENT` and `CRM_BUPA_IL_SEARCH`, which include business add-ins (BAdIs) for the WebClient UI. You find these BAdIs in Customizing for Customer Relationship Management under ➔ Master Data ➔ Business Partner ➔ Accounts and Contacts ➔ Business Add-Ins ➔

SAP Notes

The following table shows the SAP Notes that you need to refer to if you want to continue to use certain functions in this release:

Table 16:

<table>
<thead>
<tr>
<th>Note Number</th>
<th>Short Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>999092</td>
<td>Field and screen modification</td>
</tr>
<tr>
<td>1017763</td>
<td>Pop-ups for postal validation</td>
</tr>
</tbody>
</table>
6.1.2 Products, Product Hierarchies, Objects, Partner and Product Ranges

Enhancements

The following table provides a comparison between SAP CRM 5.0 and the current release:

Table 17:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Enhancement in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintenance transaction</td>
<td>SAP GUI</td>
<td>As in PC UI, maintenance is split for the different types of products:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Products (common search for product type material and service, but maintenance of material only)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Service</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Warranty</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Competitor products</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Objects</td>
</tr>
</tbody>
</table>

Enhancing Products

- To enhance products in the WebClient UI, you can use the following business add-ins (BAdIs) in Customizing for Customer Relationship Management under Master Data > Products > Business Add-Ins:
  - BAdI: Maintenance of Additional Data in Product BOL (CRM_PRODIL_ADD_DATA)
  - BAdI: Enhancements in WebClient UI for Products (CRM_PRODIL_UIU_BADI)
- To enhance standard searches with search parameters for fields in set types, see SAP Note 1026956.
- To add important fields to the header area of the WebClient UI and make them visible at first glance, see SAP Note 1088910.
- UI generation of customer-specific relationships
  The appropriate BOL layer entries can be generated; the views need to be manually developed and integrated into the product application.

Note

For more information about how to add new fields and set types, 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 Master Data > Products > Concepts > Set Types and Attributes > Definition of Set Types and Attributes and Creating UI Configuration for Set Types.
Restrictions

The following tables provide a comparison between SAP CRM 5.0 and the current release:

Table 18: Restrictions for Products

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Restriction in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Concept of inactive products</td>
<td>SAP GUI</td>
<td>No longer supported</td>
</tr>
<tr>
<td>To block a product for business transactions, you need to set the status to <em>locked</em>; inactive products need to be set to <em>active</em> in SAP GUI, before they can be changed in the Web-Client UI.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Display of related business documents (BDocs)</td>
<td>SAP GUI</td>
<td>No longer supported</td>
</tr>
<tr>
<td>Recategorization of products</td>
<td>SAP GUI</td>
<td>Only available in SAP GUI</td>
</tr>
<tr>
<td>Display data for date/time in the past (this does not refer to change documents)</td>
<td>SAP GUI</td>
<td>No longer supported</td>
</tr>
<tr>
<td>The change history allows a detailed view of the changes.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UI generation of relationships between products and business partner/product</td>
<td>SAP GUI</td>
<td>BOL entries are generated for the WebClient UI; the user interface is not generated.</td>
</tr>
</tbody>
</table>

Table 19: Restrictions for Product Hierarchies

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Restriction in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Definition of default values and value restrictions with regard to the maintenance of product categories</td>
<td>SAP GUI</td>
<td>The new template functionality can be used to define default values on category level; to define value restrictions, values can only be set in the attribute definition.</td>
</tr>
</tbody>
</table>

Table 20: Restrictions for Partner/Product Ranges

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Restriction in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listing functionality for partner/product ranges (PPRs): specific view on PPR reporting and maintenance adapted to the specific needs of the consumer products (CP) industry</td>
<td>SAP GUI</td>
<td>Only generic PPR maintenance can be used.</td>
</tr>
</tbody>
</table>

Migration Activities

Object Fact Sheet

The environment for Customizing and configuration of a fact sheet is provided in this release. The appropriate steps have to be performed for the object fact sheet. Additionally, the required fact sheet views need to be developed and assigned to this object fact sheet.
SAP Notes

The following table shows the SAP Notes that you need to refer to if you want to continue to use certain functions in this release:

Table 21:

<table>
<thead>
<tr>
<th>Note Number</th>
<th>Short Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1026475</td>
<td>UI layout</td>
</tr>
<tr>
<td></td>
<td>• In this release, only those relationships that are explicitly assigned to the categories are visible in the UI. In SAP GUI, combined screens exist.</td>
</tr>
<tr>
<td></td>
<td>• Since the WebClient UI does not support tab pages, the assignment of views and positions is no longer evaluated.</td>
</tr>
</tbody>
</table>

6.1.3 Installed Bases

Restrictions

The following table provides a comparison between SAP CRM 5.0 and the current release:

Table 22:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Restriction in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display of detail data for the products</td>
<td>SAP GUI, PC UI</td>
<td>You can navigate via hyperlink to the complete data.</td>
</tr>
<tr>
<td>Maintenance of specific data for the (individual) object</td>
<td>SAP GUI, PC UI</td>
<td>You can navigate via hyperlink to the complete data.</td>
</tr>
<tr>
<td>No display of installed bases at a specific point in time</td>
<td>SAP GUI</td>
<td>Not available</td>
</tr>
<tr>
<td>Structure of an installed base – assigned as component – not visible in the installed base in focus</td>
<td>SAP GUI</td>
<td>You can navigate via hyperlink to the complete data.</td>
</tr>
<tr>
<td>Parallel display of two installed bases, one beside the other, and moving objects between both (transaction IB54)</td>
<td>SAP GUI</td>
<td>Not available</td>
</tr>
</tbody>
</table>
### 6.2 Sales

#### 6.2.1 Sales Order Management, CRM Billing

**Enhancements**

The following table provides a comparison between SAP CRM 5.0 and the current release:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Enhancement in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price change approval workflow</td>
<td>Not available</td>
<td>New function</td>
</tr>
<tr>
<td>Credit analyst workbench</td>
<td>Not available</td>
<td>New function</td>
</tr>
<tr>
<td>Package quotation</td>
<td>Not available</td>
<td>New function</td>
</tr>
</tbody>
</table>

**Restrictions**

The following table provides a comparison between SAP CRM 5.0 and the current release:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Restriction in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inquiry processing</td>
<td>SAP GUI</td>
<td>Not available</td>
</tr>
<tr>
<td>Partial transaction processing (sales order, sales quotation, and sales contract)</td>
<td>SAP GUI</td>
<td>Not available</td>
</tr>
</tbody>
</table>
6.2.2 Opportunities, Listings, Territory Management, and Organizational Management

Restrictions

The following table provides a comparison between SAP CRM 5.0 and the current release:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Restriction in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Combination of quotation and order items in one document</td>
<td>SAP GUI</td>
<td>Not available</td>
</tr>
<tr>
<td>Incentive and commission management</td>
<td>SAP GUI, PC UI</td>
<td>Not available</td>
</tr>
<tr>
<td>Commodity pricing</td>
<td>SAP GUI, PC UI</td>
<td>Not available</td>
</tr>
</tbody>
</table>

The following functions are not supported:

- The hierarchy on item-header level; only the hierarchy on header-header level is supported, which is visualized as a simple list.
- Project integration with Product Lifecycle Management (PLM) in Collaboration Projects (cProjects)

- Listing reports: The function *Save Search As* is not supported.

- It is not possible to assign employees to a territory when you use the input help of the *Employee* field; this is now possible with the input help of the *Position* field.
- The number of objects for a territory is not displayed.

- New territories cannot be assigned from the organizational model; assignment is only possible via territory management; from the organizational model you can only see the existing assignments.
- In the assignment block, the corresponding SAP ERP sales organization is no longer displayed; this is now done in CRM Customizing.
- While trying to download the employee data in SAP CRM, a runtime error may occur. For more information, see SAP Note 1635858.
6.2.3 Account Planning

Enhancements

The following table provides a comparison between SAP CRM 5.0 and the current release:

Table 26:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Enhancement in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customizing</td>
<td>Not available</td>
<td>Action profile is assigned as default value in Customizing.</td>
</tr>
<tr>
<td>Customizing</td>
<td>Not available</td>
<td>Business warehouse analysis can be viewed within an account plan.</td>
</tr>
<tr>
<td>Change history</td>
<td>Not available</td>
<td>Change history function is available for account plan.</td>
</tr>
<tr>
<td>Status <strong>Rejected</strong></td>
<td>Not available</td>
<td>New system status <strong>Rejected</strong> is available; it locks the account plan and deletes the associated condition records.</td>
</tr>
<tr>
<td>Flex front end</td>
<td>Not available</td>
<td>All integrated planning applications have a flex front end in this release; this change is performed in the Planning Services infrastructure. However, the flex UI is only available as of SAP Business Warehouse (SAP BW) 7.0. This release of SAP CRM and the BI 3.5 UI are automatically switched to the current HTML control.</td>
</tr>
</tbody>
</table>

Restrictions

The following table provides a comparison between SAP CRM 5.0 and the current release:

Table 27:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Restriction in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>BAdl CRM_ACC_PL, method AUTHORITY CHECK</td>
<td>PC UI</td>
<td>The method <strong>AUTHORITY_CHECK</strong> is no longer called for the result list. There is no workaround possible at the moment; instead, use Easy Enhancement Workbench (EEW).</td>
</tr>
<tr>
<td>BAdl CRM_ACC_PL</td>
<td>SAP GUI, PC UI</td>
<td>New BAdl methods <strong>CHECK_BEFORE_SAVE</strong> and <strong>GET_DROPDOWNBOX_VALUE</strong></td>
</tr>
<tr>
<td>Customizing</td>
<td>SAP GUI, PC UI</td>
<td>The delivery Customizing for planning profile groups has been changed: <strong>Plan Basis</strong> is no longer used; it has been replaced by <strong>Product Planning Basis</strong>.</td>
</tr>
</tbody>
</table>
### Function in SAP CRM 5.0

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Restriction in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner/product range (PPR) check on person responsible</td>
<td>SAP GUI, PC UI</td>
<td>The PPR check is only performed on the planning account and product/product category; it is no longer performed on the person responsible.</td>
</tr>
</tbody>
</table>

### 6.2.4 Mobile Sales

#### Enhancements

The following table provides a comparison between SAP CRM 5.0 and the current release:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Enhancement in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quotation and order management</td>
<td>Mobile client</td>
<td>Additional Customizing is necessary.</td>
</tr>
<tr>
<td>Quotation and order management: rough stock information</td>
<td>Mobile client</td>
<td>Additional Customizing is necessary.</td>
</tr>
<tr>
<td>Quotation and order management: sales-area dependent transaction types</td>
<td>Mobile client</td>
<td>Additional Customizing is necessary.</td>
</tr>
<tr>
<td>Quotation and order management: cockpit</td>
<td>Mobile client</td>
<td>Additional Customizing is necessary.</td>
</tr>
</tbody>
</table>

#### Restrictions

The following table provides a comparison between SAP CRM 5.0 and the current release:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Restriction in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account planning</td>
<td>Mobile client</td>
<td>The account planning data persists only in SAP Business Warehouse (SAP BW); there is no data present on the CRM server. There is also no automatic conversion of previous account plans created in SAP CRM 5.0; these account plans are only usable by way of reporting.</td>
</tr>
</tbody>
</table>
6.3 Service Enhancements

The following table provides a comparison between SAP CRM 5.0 and the current release:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Enhancement in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role concept</td>
<td>SAP GUI, PC UI</td>
<td>The Service Professional role combines the functions of the former Service Manager and Service Representative roles.</td>
</tr>
<tr>
<td>Multilevel categorization</td>
<td>SAP GUI, PC UI</td>
<td>Used in all service transactions</td>
</tr>
<tr>
<td>Screen sequence control</td>
<td>SAP GUI</td>
<td>Screen sequence control is no longer supported; new unified way to customize the WebClient UI.</td>
</tr>
</tbody>
</table>

Restrictions

There are no functional restrictions in the service transactions in this release compared to SAP CRM 5.0:

Migration Activities

Multilevel Categorization

In SAP CRM 5.0 (SAP GUI and PC UI), users could use subject codes to classify the header and items of service transactions. In the current release, the use of subject codes is no longer recommended. Instead, you can create categorization schemas. A categorization schema is a hierarchical structure that can be defined flexibly within the category modeler. It can be created for the following applications:

- Cases
- Complaints
- Returns
- In-house repairs
- Service orders
- Service order quotations
- Service order templates
- Service confirmations
- Warranty claims
- Service request or incident
- Problem
- Request for change
A subject profile is then assigned to the categorization schema. When you create the different nodes of a hierarchy structure, the subject codes that are available within the subject profile that you have assigned to the schema need to be mapped to these nodes.

**Caution**

If you implement Mobile Service in the current release, the categorization schemas are not supported on the client; instead, the previous use of subject codes is still supported. To avoid inconsistencies between CRM mobile and CRM online, all subject codes that are part of the subject profile assigned to the categorization schema of a specific application need to be mapped to a node in the schema. For more information about using subject codes, see SAP Note 1430101.

### 6.3.1 Complaints and Returns; In-House Repair Orders

**Enhancements**

The following table provides a comparison between SAP CRM 5.0 and the current release:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Enhancement in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search for complaints, returns, and in-house repairs</td>
<td>SAP GUI, PC UI</td>
<td>User-defined search variants are now available.</td>
</tr>
<tr>
<td>Maintenance transaction</td>
<td>SAP GUI, PC UI</td>
<td>The three types are now divided into three applications that provide optimized UI configuration: complaints, returns, and in-house repairs.</td>
</tr>
<tr>
<td>Advanced search for reference documents</td>
<td>SAP GUI</td>
<td>The search for reference documents covers both internal and external document types.</td>
</tr>
<tr>
<td>Advanced Returns Management</td>
<td>Not available</td>
<td>Return process integration related to ERP Advanced Returns process (business function CRM_COMPL_ARM_1)</td>
</tr>
</tbody>
</table>
6.3.2 Service Order Management and IT Service Management

Restrictions

The following tables provide a comparison between SAP CRM 5.0 and the current release:

**Table 32: Restrictions for Service Orders, Service Contracts, and Warranty Claim Processing**

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Restriction in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item hierarchy tree</td>
<td>SAP GUI, PC UI</td>
<td>Not supported</td>
</tr>
<tr>
<td>Action monitor</td>
<td>SAP GUI</td>
<td>Only supported in SAP GUI</td>
</tr>
</tbody>
</table>

**Table 33: Restrictions for Service Orders and Service Contracts**

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Restriction in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service order quotations and service contract quotations</td>
<td>SAP GUI, PC UI</td>
<td>Converting service order quotations to service orders (or converting service contract quotations to service contracts) by using statuses is not supported. To create a service order from a service order quotation (or create a service contract from a service contract quotation) you must create a follow-up transaction.</td>
</tr>
</tbody>
</table>

**Table 34: Restrictions for Service Contracts**

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Restriction in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service level agreement (SLA) profile administration</td>
<td>SAP GUI, PC UI</td>
<td>The administration transaction (CRMD_SERV_SLA) Maintain Availability and Response Times remains in SAP GUI.</td>
</tr>
</tbody>
</table>

6.3.3 Case Management

Enhancements

The following table provides a comparison between SAP CRM 5.0 and the current release:

**Table 35:**

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Enhancement in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case closing</td>
<td>SAP GUI, PC UI</td>
<td>In cases, you can now close assigned business transactions; Customizing tables are available to define rules for when and how a case closing starts the closing of the dependent transactions.</td>
</tr>
</tbody>
</table>
Restrictions

The following table provides a comparison between SAP CRM 5.0 and the current release:

Table 36:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Restriction in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action monitor</td>
<td>SAP GUI</td>
<td>Only supported in SAP GUI</td>
</tr>
</tbody>
</table>

6.3.4 Mobile Service

Restrictions

The following table provides a comparison between SAP CRM 5.0 and the current release:

Table 37:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Restriction in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignments</td>
<td>Mobile client</td>
<td>Available on the mobile client, but not supported in this release online</td>
</tr>
<tr>
<td>Multilevel categorization</td>
<td>Mobile client</td>
<td>Used in all service transactions in this release online; the former use of subject codes is still supported only on the mobile client.</td>
</tr>
</tbody>
</table>

Migration Activities

Product Service Letter
Remove the relevant product service letter titles and fields from the mobile client.

Usage-Based Billing
Remove the relevant usage-based billing titles and fields from the mobile client.

Object Structure
Remove the relevant object structure titles and fields from the mobile client.

Assignments
Remove the relevant assignment titles and fields from the mobile client.

Multilevel Categorization
For more information about multilevel categorization, see Service [page 64].
6.4  Marketing

6.4.1  Marketing Plans and Campaigns

Enhancements

The following table provides a comparison between SAP CRM 5.0 and the current release:

Table 38:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Enhancement in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customizing</td>
<td>Not available</td>
<td>Status profile, action profile, and communication medium are assigned as default values in Customizing.</td>
</tr>
<tr>
<td>Campaign execution</td>
<td>Not available</td>
<td>All assigned segments are transferred to channel (for example, e-mail) when you click Start.</td>
</tr>
<tr>
<td>Enhancement spot CRM_MKTPL with several BAdIs</td>
<td>Not available</td>
<td>Based on the introduction of a new object layer architecture, new BAdIs have been introduced:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- The BAdIs CRM_MKTPL_OL_APP and BCRM_MKTPL_OL_OBJ replace BAdI CRM_MKTPL.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- The new BAdI CRM_MKTPL_OL_ASG allows you to build enhancements for assignments.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- The new BAdI CRM_MKTPL_SEARCH allows you to build enhancements for the search.</td>
</tr>
</tbody>
</table>

Restrictions

The following table provides a comparison between SAP CRM 5.0 and the current release:

Table 39:

<table>
<thead>
<tr>
<th>Function in SAP 5.0</th>
<th>5.0 UI</th>
<th>Restriction in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>BAdI CRM_MKTPL</td>
<td>SAP GUI, PC UI</td>
<td>Due to changes in architecture (object layer), the old BAdI CRM_MKTPL is no longer supported. It is replaced by the two BAdIs CRM_MKTPL_OL_APP and CRM_MKTPL_OL_OBJ. The example implementation CL_EXM_CRM_MKTPL_WRAPPER can help you to convert the old implementation to the new implementation. This implementation can even be used to connect the new BAdIs to the old BAdI; however, this is not recommended.</td>
</tr>
</tbody>
</table>
### Function in SAP 5.0

<table>
<thead>
<tr>
<th>Function</th>
<th>5.0 UI</th>
<th>Restriction in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>BAdI CRM_MKTPL, method AUTHORITY_CHECK</td>
<td>PC UI</td>
<td>The method AUTHORITY_CHECK is no longer used for the result list for performance reasons; you can either use the Access Control Engine (ACE) or BAdI method CHANGE_QUERY_RESULT in CRM_MKTPL_SEARCH instead.</td>
</tr>
<tr>
<td>BAdI CRM_MKTPL_KPI_BADI</td>
<td>SAP GUI, PC UI</td>
<td>Since the key figure planning integration has been redesigned, the BAdI CRM_MKTPL_KPI_BADI is not called anymore; it has been replaced by BAdIs CRM_KFP_BADI and CRM_KFP_COMP_BADI.</td>
</tr>
<tr>
<td>SAP Business Warehouse (SAP BW) reports</td>
<td>SAP GUI, PC UI</td>
<td>SAP BW reports assigned to planning profile groups are not evaluated anymore for marketing plans and campaigns.</td>
</tr>
<tr>
<td>Customizing</td>
<td>SAP GUI</td>
<td>The Customizing settings for column number, column width, and text width for distributions are not evaluated anymore.</td>
</tr>
<tr>
<td>ERP integration</td>
<td>SAP GUI, PC UI</td>
<td>The ERP integration type Online is not available anymore. Only the ERP integration via middleware is supported.</td>
</tr>
</tbody>
</table>
| Customizing | SAP GUI, PC UI | The standard Customizing for planning profile groups has changed:  
  - Workflow profiles from 4CO1 and 4CO2 removed  
  - Business partner planning profile moved from 4MKT to 4CP1  
  - Planning profile group SAP1 removed  
  - New key performance indicator (KPI) removed |
| Key figure planning | SAP GUI, PC UI | Old style key figure planning in SAP List Viewer (ALV) is not supported anymore. |
| Budgeting | SAP GUI | Top-down budgeting in Microsoft Excel is not supported anymore. |
| Success key measure planning | SAP GUI, PC UI | Success key measure planning is not supported anymore. |
| Hierarchy | SAP GUI, PC UI | The creation of a campaign or campaign elements below campaign elements is no longer possible. |
| Segment partner function | SAP GUI, PC UI | The segment partner function is no longer available (BOL/GENIL exists, but no UI component). |
| Search function | SAP GUI, PC UI | Search results do not include objects of the following types: campaign element, marketing plan element, and trade promotion element. |
6.4.2 Segmentation

Migration Activities

To display target group members, you need to adapt business add-in CRM_MKTTG_SEG_MEM_EX.

Example

See method SELECT_TG_MEMBER_DETAILS of class CL_DEF_IM_CRM_MKTTG_SEG_MEM_EX for variable value FLT_VAL = '51'.

As of SAP CRM 7.0, ranges for certain number range objects must be created manually in each client that uses the segmentation application. For more information, see SAP Note 1565886.

6.4.3 External List Management

Migration Activities

Mapping formats created in earlier releases need to be migrated before they can be used in the current release. Transport of mapping formats is not included in the application anymore. Instead, you need to use the marketing export tools in SAP GUI.

If you want to continue to use certain functions in the current release, see SAP Note 976438.

6.4.4 Mail Forms

Restrictions

The following table provides a comparison between SAP CRM 5.0 and the current release:

Table 40:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Restriction in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Letter as direct channel</td>
<td>SAP GUI</td>
<td>Letter is no longer supported as a direct channel; sending letters should be performed via export channel.</td>
</tr>
<tr>
<td>PDF format</td>
<td>SAP GUI</td>
<td>PDF format is no longer supported.</td>
</tr>
<tr>
<td>Mail templates</td>
<td>SAP GUI</td>
<td>Mail templates are no longer supported.</td>
</tr>
<tr>
<td>Address administration</td>
<td>SAP GUI, PC UI</td>
<td>Automatic address administration via address node is no longer supported.</td>
</tr>
</tbody>
</table>
Migration Activities

Since SAP Smart Forms are not technologically supported for mail forms anymore, you can no longer use existing mail forms. Therefore, you need to create new mail forms.

6.4.5 Trade Promotion Management

Enhancements

The following table provides a comparison between SAP CRM 5.0 and the current release:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Enhancement in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customizing</td>
<td>SAP GUI</td>
<td>Status profile and action profile are assigned as default values in Customizing.</td>
</tr>
<tr>
<td>Customizing</td>
<td>SAP GUI</td>
<td>Customizing for Define Parameters for BI Analysis was adapted for the WebClient UI.</td>
</tr>
<tr>
<td>Product hierarchy promotion</td>
<td>Not available</td>
<td>Promotions can be planned for product category, product group, or product segment without the need to explode to the product level.</td>
</tr>
</tbody>
</table>

Restrictions

The following table provides a comparison between SAP CRM 5.0 and the current release:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Restriction in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>BAdI CRM_MKTPL</td>
<td>SAP GUI, PC UI</td>
<td>Due to changes in architecture (object layer), the old BAdI CRM_MKTPL is not supported any longer; it is replaced by the two BAdIs CRM_MKTPL_OL_APP and CRM_MKTPL_OL_OBJ. The example implementation CL_EXM_CRM_MKTPL_WRAPPER can help you to convert the old implementation to the new implementation. This implementation can even be used to connect the new BAdIs to the old BAdI; however, this is not recommended.</td>
</tr>
<tr>
<td>Function in SAP CRM 5.0</td>
<td>5.0 UI</td>
<td>Restriction in This Release</td>
</tr>
<tr>
<td>------------------------</td>
<td>--------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>BAdI CRM_MKTPL, method AUTHORITY_CHECK</td>
<td>PC UI</td>
<td>The method AUTHORITY_CHECK is no longer called for the result list; no workaround is possible at the moment; use Easy Enhancement Workbench (EEW) instead. Trade promotion management uses Access Control Engine (ACE) to filter search results.</td>
</tr>
<tr>
<td>BAdI CRM_MKTPL_KPI_BADI</td>
<td>SAP GUI, PC UI</td>
<td>Since the key figure planning integration has been redesigned, the BAdI CRM_MKTPL_KPI_BADI is not called anymore. It has been replaced by the BAdIs CRM_KFP_BADI and CRM_KFP_COMP_BADI.</td>
</tr>
<tr>
<td>ERP integration</td>
<td>SAP GUI, PC UI</td>
<td>ERP integration type Online is not available anymore. Only ERP integration via middleware is supported.</td>
</tr>
<tr>
<td>Customizing</td>
<td>SAP GUI, PC UI</td>
<td>Delivery Customizing for planning profile groups has been changed; the new key performance indicator (KPI) has been removed.</td>
</tr>
<tr>
<td>Key figure planning</td>
<td>SAP GUI, PC UI</td>
<td>Old-style key figure planning in SAP List Viewer (ALV) is no longer supported.</td>
</tr>
<tr>
<td>Budgeting</td>
<td>SAP GUI</td>
<td>Top-down budgeting in Microsoft Excel is no longer supported.</td>
</tr>
<tr>
<td>Success key measure planning</td>
<td>SAP GUI, PC UI</td>
<td>Success key measure planning is no longer supported.</td>
</tr>
<tr>
<td>Hierarchy</td>
<td>SAP GUI, PC UI</td>
<td>Creation of trade promotions or trade promotion elements below trade promotion elements is no longer possible. An existing marketing project cannot be assigned to another marketing project (only to a link in the parent field, but there is no Add button in the hierarchy).</td>
</tr>
<tr>
<td>Segment partner function</td>
<td>SAP GUI, PC UI</td>
<td>The segment partner function is no longer available.</td>
</tr>
<tr>
<td>Search function</td>
<td>SAP GUI, PC UI</td>
<td>Search results do not include objects of the following types: campaign element, marketing plan element, and trade promotion element.</td>
</tr>
<tr>
<td>Copy function</td>
<td>SAP GUI, PC UI</td>
<td>The advanced copy function has been enhanced compared to SAP CRM 5.0.</td>
</tr>
<tr>
<td>Mass change</td>
<td>PC UI</td>
<td>Mass change options have been enhanced compared to SAP CRM 5.0.</td>
</tr>
<tr>
<td>Trade promotion execution</td>
<td>SAP GUI, PC UI</td>
<td>The execution function is limited to the activity.</td>
</tr>
<tr>
<td>Customer defaults</td>
<td>PC UI</td>
<td>The promotional calendar is no longer supported.</td>
</tr>
</tbody>
</table>
6.5 Interaction Center

Enhancements

The following table provides a comparison between SAP CRM 5.0 and the current release:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Enhancement in This Release</th>
</tr>
</thead>
</table>
| Standard responses      | SAP GUI| • New standard response editing page in the IC Manager role  
|                         |        | • Insert agent signatures using attributes in mail form tool |
| Alerts                  | SAP GUI| • New alert editing tool in the IC Manager role (Web-Client UI) instead of in the Customizing activity  
|                         |        | • Alerts are now part of the new intent-driven interaction guidance. |
| Rule modeler            | PC UI  | • New application for rule modeler in WebClient UI  
|                         |        | • New program CRM_RULE_TRANS to transport rule policies and rules |
| Interactive scripting   | IC WebClient UI | Navigation concept has changed |
| Activity clipboard      | IC WebClient UI | • Customizing has been enhanced for more flexibility  
|                         |        | • The clipboard now offers a customizable number of columns and supports up to five columns. |
| Intent-Driven Interaction (IDI) | Not available | • Intent-driven interaction guidance  
|                         |        | • Interaction modeling and evaluation |

**Note**
The IDI is available as of SAP CRM 5.1.

- Address validation and duplicate check
- Do not contact indicator available in More Fields link
- Index-based search
- Mixed B2B and B2C account identification
- Option to search and create related business partner (BP) for identified account
- iBase search is no longer the only view that can be embedded into the right-hand side of the account identification page. Customizing is now available to integrate iBase or other components.
### Function in SAP CRM 5.0

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Enhancement in This Release</th>
</tr>
</thead>
</table>
| Product                 | IC WebClient UI | • Product registration allows the integration of objects.  
|                         |              | • Product search and result list enhanced  
|                         |              | • Product search based on product catalog |
| Multichannel communication | IC WebClient UI | • Dual tone multifrequency tones (DTMF) enabled  
|                         |              | • Display and maintenance of contact-attached data  
|                         |              | • Pushing ERMS e-mails to agents enabled  
|                         |              | • Monitoring statistics from multiple telephony systems  
|                         |              | • Presence-availability of agents when transferring interactions  
|                         |              | • Simple telephony integration  
|                         |              | • IC toolbar now supports icons. |
| Interaction record      | IC WebClient UI | Allow auto or manual dialog boxes if the interaction record has multiple organizational units and partners based on the Customizing settings |
| ERP sales order         | IC WebClient UI | Listing is added to the product proposal BAdI for IC ERP sales order. |
| Service order/service ticket/lead | IC WebClient UI | • Dialog box for organizational data selection  
|                         |              | • Order can be created without first confirming an account ID |
| Complaint/sales order/lead | IC WebClient UI | Automatic dialog boxes can be configured for organizational unit selection and partner selection. |
| Complaint/Sales Order/Lead | IC WebClient | Automatic dialog boxes can be configured for organizational unit selection and partner selection |

### Restrictions

The following table provides a comparison between SAP CRM 5.0 and the current release:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Restriction in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scratch pad</td>
<td>IC WebClient UI</td>
<td>Scratch pad needs to be closed before importing content.</td>
</tr>
<tr>
<td>Alerts</td>
<td>IC WebClient UI</td>
<td>No default alerts are provided.</td>
</tr>
<tr>
<td>Launch transaction</td>
<td>PC UI</td>
<td>PC UI-based launch transaction is no longer supported.</td>
</tr>
</tbody>
</table>
### Migration Activities

#### Rule Modeler

Complex PC UI-based value help is no longer supported. This has been replaced by value help based on ABAP search help. If you have enhanced the rule repository with your own attributes or actions, you need to adjust your coding to support ABAP search help.

Simple PC UI-based value help is no longer supported. By default, this is now displayed as dropdown list boxes. If you have enhanced the rule repository with your own attributes or actions and do not want to use dropdown list boxes for specific value help, you need to adjust your coding to use ABAP search help.

#### Interactive Scripting

Recreate SAP CRM 5.0 scripts that used navigation, in this release.

#### Custom Views and Controllers

Custom views and controllers from SAP CRM 5.0 do not work with the framework in this release. Re-create all custom views and their corresponding controllers in the component workbench (transaction `BSP_WD_CMPWB`).

#### Standard Responses

Recreate all standard responses with the new editor.

#### Alerts

Recreate alerts with the new editing tool. No standard alerts are delivered with this release.

#### Launch Transaction

Regenerate launch transaction in transaction `CRMC_UI_ACTIONWZ`.

#### Activity Clipboard

Make Customizing settings for the activity clipboard in the new view cluster `CRMC_UI_CLIP`.

#### Navigation Bar

Make Customizing settings for the navigation bar in transaction `CRMC_UI_NBLINKS`.

#### IC Profile

The IC profile is now called business role and is maintained in transaction `CRMC_UI_PROFILE`.

#### Account Identification

Specify the account identification profile, submenu object components, and iBase component and select the auto search. The search approach that was previously maintained in the account identification profile, fields `IB_PARTNER`, is now selected here.
6.6 Partner Channel Management

Enhancements

The following table provides a comparison between SAP CRM 5.0 and the current release:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Enhancement in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity management</td>
<td>Not available</td>
<td>New transaction types for interaction logs</td>
</tr>
<tr>
<td>Partner management</td>
<td>Not available</td>
<td>New workflow to delete users</td>
</tr>
<tr>
<td>Partner management</td>
<td>Not available</td>
<td>New role <code>PRCONT ~ Partner Contact</code></td>
</tr>
<tr>
<td>Partner management</td>
<td>Not available</td>
<td>Business partner role <code>Channel Partner</code> is automatically assigned during creation.</td>
</tr>
<tr>
<td>Account management</td>
<td>Not available</td>
<td>New partner-specific UI for the maintenance of account contacts</td>
</tr>
<tr>
<td>Further partner UIs</td>
<td>Not available</td>
<td>New UI configurations for the display of products and internal employees of partners</td>
</tr>
<tr>
<td>Market development funds</td>
<td>Not available</td>
<td>The Partner Channel Management solution now supports the process of market development funds. The roles for <code>Channel Manager</code> and <code>Partner Manager</code> have been extended by several applications.</td>
</tr>
<tr>
<td>Rule-based employee assignment to channel partners</td>
<td>Not available</td>
<td>Partner management now contains a button to assign a channel manager to a channel partner based on certain rules.</td>
</tr>
<tr>
<td>User assignment to company contacts in the <code>Channel Partner</code> role</td>
<td>Not available</td>
<td>The <code>Company Contacts</code> application has been extended in such a way that information can be maintained.</td>
</tr>
</tbody>
</table>

New Authorization Object to Control Business Partner Roles

In this release, the authorization object `CRM_BPROLE` controls the change access to business partner roles. This is useful to restrict the access of external users. The authority check is deactivated by default. You need to activate it by using a BAdI in Customizing for `Customer Relationship Management` under `Master Data` `Business Partner` `Business Add-Ins` `Implementation: Filtering of BP Roles by Authorization Check`.

Rule-Based Employee Assignment

The `Assign Employee` button has been introduced in partner management. It allows the automatic assignment of channel managers to channel partners. For more information, see Customizing for `Customer Relationship Management` under `Master Data` `Business Partner` `Rule-Based Assignment of Employees`.

The button is only visible when the employee assignment is switched on.
Restrictions

The following table provides a comparison between SAP CRM 5.0 and the current release:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Restriction in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner Employee role</td>
<td>PC UI</td>
<td>The Partner Employee role is not available; the My Profile application is not available in the WebClient UI.</td>
</tr>
</tbody>
</table>

Migration Activities

Integration of Web Channel Applications into the WebClient UI

The business role for the external partner manager user includes several Web Channel applications. Due to the switch from SAP NetWeaver Portal to the WebClient UI, the settings for the integration of Web Channel applications have changed. For more information about the new settings, see Customizing for Customer Relationship Management under Partner Channel Management > Basic Settings > Activate Links from CRM WebClient UI to CRM Web Channel Applications.

Change in Partner Functions for Business Activities

To harmonize the partner functions that are used for activities and tasks, one partner function has been changed in the partner determination profile 00000046 – CHM Bus.Activities (Partner). Instead of partner function 00000022 Person Responsible, partner function 00000014 Employee Responsible is now used.

Activity Transaction Types for Interaction Log

In this release, the following activity transaction types are available:

- SCCP Partner Report
- SCPO Channel Report

Request to Brand Owner

The request-to-brand owner approach has been changed slightly compared with SAP CRM 5.0. The transaction type CHM4 has been introduced to support this function.

Changed Request for Qualification

In SAP CRM 4.0, in the request for qualification, surveys were used to capture qualification-specific data. Since SAP CRM 5.1, surveys are not used anymore. Instead, the new transaction type CHM3 was introduced. Transaction type CHM2 is now obsolete.

New Partner Contact Role

In SAP CRM 5.2, the new business partner role PRCONT – Partner Contact was introduced. This role allows you to improve separating employees of channel partners from other contacts. The applications Partner Contacts (for the channel manager) and Company Contacts (for the partner manager) filter on this business role.
Note
If you have existing partner contact records in your system, you need to assign them to the new business partner role PRCONT.

Channel Partner Role
Since SAP CRM 5.2, channel partners are automatically assigned the business partner role Channel Partner when they are created in the system. This role allows you to improve separation of channel partners from other accounts.

New Workflow to Delete Users
In SAP CRM 5.2, the workflow WS53000005 CHM_DELUSER was introduced.

In the Channel Management business scenario, the brand owner, together with external companies called channel partners, uses the CRM system. To give employees of these external companies access to the brand owner system, they have users in this brand owner system.

These users are always assigned to a business partner that represents the channel partner employee in the CRM brand owner system. Every channel partner employee (his or her business partner) has a relationship is contact of to a channel partner company.

Note
If this relationship is deleted, you need to check whether the user related to the channel partner employee also needs to be deleted in the brand owner system. However, the user is not deleted automatically, but a decision of the brand owner employee responsible (for example, channel manager) is required. This decision process is provided via the business workflow WS53000005 CHM_DELUSER.

You need to make the following settings for this business scenario:

- Activate start event linking for WS53000005 in Customizing of CRM in transaction OOCU.
- Assign agents for the Delete user decision task TS53007922, for example, based on the authorization role for the Channel Manager role in Customizing of CRM in transaction OOCU.
- Activate the BAdI implementation CRM_CHM_BUPA_UPD of the BAdI PARTNER_UPDATE.

User Assignment in Channel Manager Role
In SAP CRM 4.0, the Web Channel user management was integrated in the Channel Manager role. Since SAP CRM 5.2, the channel manager can maintain the user data in the partner contacts application. Additionally, the Web Channel user management is available in the Channel Manager role as hidden application.

User Assignment in Partner Role
In addition to the Web Channel user management application, the Company Contacts application now contains an assignment block that allows you to maintain user data.

Changed User Management for External Users
Up to SAP CRM 5.0, the CRM Web Channel user management in the Enterprise Portal was used for the channel manager and the partner manager. The external partner users were created in this application. In this release, the CRM Web Channel user management is no longer displayed by default in the CRM business roles or in the Channel Manager and Partner Manager portal roles. Instead, the applications Partner Contact (in the Channel Manager role) and Company Contact (in the Partner Manager role) contain the User assignment block. You can now create or
update user data in this assignment block. The assignment block functions are similar to the CRM Web Channel user management application.

Only if you use Partner Channel Management in the Enterprise Portal, is there a gap compared to SAP CRM 5.0. The CRM Web Channel user management application offers special functions to synchronize back-end users in the CRM server with the SAP User Management Engine (UME) user in the Enterprise Portal. This synchronization is missing when you use the User assignment block. In this assignment block, you can only create a user in the CRM server.

If you want to use the CRM Web Channel user management for the Channel Manager and Partner Manager business roles, you need to:

1. Include the CRM Web Channel user management in the Channel Manager and Partner Manager business roles. Both business roles already contain the logical links. These links are hidden by default.
2. Change the UI configuration for the Partner Contact and Company Contact applications to exclude the assignment block User.

Obsolete Customizing Settings

In the Customizing activity Customer Relationship Management > Partner Channel Management > Basic Settings > Define Copy Control for Order Processing the column Application is obsolete. This column will be removed in a future release.

SAP Notes

The following table shows the SAP Notes that you need to refer to if you want to continue to use certain functions in this release:

Table 47:

<table>
<thead>
<tr>
<th>Note Number</th>
<th>Short Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1138855</td>
<td>Partner Channel Management Authorization Roles</td>
</tr>
<tr>
<td>1111654</td>
<td>Partner Channel Management Upgrade from CRM 5.0</td>
</tr>
<tr>
<td>1119251</td>
<td>Partner Channel Management Upgrade: New BP role PRCONT</td>
</tr>
<tr>
<td>1119661</td>
<td>Partner Channel Management Upgrade: Regenerate PDF</td>
</tr>
</tbody>
</table>

6.7 Cross-Application Components

6.7.1 Fact Sheet

This release contains the necessary environment for customizing and configuration of fact sheets. If you have assigned your own views to the account fact sheet in SAP CRM 5.0, you need to develop these views again in the current release of SAP CRM 7.0 and assign them to the account fact sheet in the current release of SAP CRM 7.0. If you have created your own fact sheet in SAP CRM 5.0, you need to perform the necessary customizing and configuration of this fact sheet in the current release of SAP CRM 7.0. Additionally, you need to develop the necessary fact sheet views and assign them to this fact sheet in the current release of SAP CRM 7.0.

### 6.7.2 Groupware Integration

You can migrate from the Java-based MapBox used in SAP CRM 5.0 to the ABAP-based MapBox used in the current release. For more information about the migration, 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 Data Exchange and Mobile Technologies > Groupware Integration > Server-Based Groupware Integration > Migration of Groupware Integration Data to the ABAP MapBox.

### 6.7.3 MS Office Integration

If you have created your own templates in SAP CRM 5.0, you can adapt these templates in the current release. The data for the templates is provided by a Web service that reads the data from a back-end and not from the user’s screen. To use MS Office Integration in the current release of SAP CRM 7.0, you need supported versions of Microsoft software. For more information about the MS Office Integration, 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 Basic Functions > Template Designer.

### 6.7.4 Web Services

The existing Web services in SAP CRM 5.0 can also be used in the current release. If you want to create new Web services in the current release, you can access the Web services tool from the Service Professional (SERVICEPRO) business role in the work center Service Operations.


### 6.7.5 Portal Integration

In the current release, the WebClient UI is integrated into SAP NetWeaver Portal. You can run this release with all features in the portal. Every CRM application is displayed in one portal page. You can easily create portal content by using the role upload tool.
The portal roles Channel Manager, Partner Manager, Customer, Telco Channel Manager, and Telco Partner Manager are contained in the CRM Business Package. You do not have to upload them separately. The CRM Business Package has to be customized as described under Basic Settings for SAP CRM (Business Package for SAP CRM) in SAP Solution Manager.

If you want to use your existing CRM business roles in the portal, proceed as follows:

1. Install the current release of SAP CRM or upgrade to this release.
2. Adapt your CRM business roles in this release and perform the necessary customizing.
3. Check your business roles in this release (standalone).
4. Install SAP NetWeaver Portal 7.5 or upgrade to this release and connect the current release of SAP CRM to the portal.
5. Export your CRM business role to an XML file and import this file to the portal.
6. Assign your generated portal role to the portal users.
   - The CRM business roles that correspond to the portal roles need to be assigned to the CRM users that correspond to the portal users.
7. Check your generated portal role in the portal.

**Note**

If your role is not running in the portal, you need to check whether you have successfully performed step 2 and step 5. Make sure that you also assign the new portal roles to the existing users.

For more information about portal integration into this release of SAP CRM, see the following:

- Customizing for SAP CRM under Customer Relationship Management > UI Framework > Portal Integration Overview

**Caution**

The People-Centric UI (PC UI) is not supported in the current release. If you want to upgrade portal roles supported in SAP CRM 5.0, follow the steps mentioned above. As a result, new portal roles are created. The previous portal roles are no longer supported.

### 6.7.6 Workflow Inbox

In the current release of SAP CRM, the workflow inbox of the Business Workplace (transaction SBWP in SAP GUI) is not available on the WebClient UI. Instead, you can use the workflow inbox of the SAP CRM worklist.
Enhancements

The following table provides a comparison between SAP CRM 5.0 and the current release:

Table 48:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Enhancement in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workflow inbox of Business Workplace</td>
<td>SAP GUI</td>
<td>Workflow inbox of the SAP CRM worklist:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>You can integrate other SAP systems with the workflow inbox of the SAP CRM worklist. This allows you to receive, display, and edit workflow tasks from other SAP systems in the workflow inbox of the SAP CRM worklist. You make the required settings in Customizing for SAP CRM under Customer Relationship Management Basic Functions.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Worklist Define Alert Inbox and Workflow Inbox.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Integrate Other SAP Systems in Workflow Inbox and BAdI: Integrate Other SAP Systems in Workflow Inbox.</td>
</tr>
</tbody>
</table>

Restrictions

The following table provides a comparison between SAP CRM 5.0 and the current release:

Table 49:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Restriction in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workflow inbox of Business Workplace</td>
<td>SAP GUI</td>
<td>Workflow inbox of the SAP CRM worklist:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• “Advance with dialog”: not supported</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Secondary methods (tab page Methods of an Activity): not supported</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Methods before work item execution: not supported</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Methods after work item execution: not supported</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Condition “complete execution”: not supported</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Program exits: not supported</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Display of work items: implemented differently from SAP GUI (different functions offered, functions offered differently)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Step type “form”: not supported</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Step type “user decision”: supported using DDLB instead of buttons</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Step type “document from template”: not supported</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Step type “ad hoc anchor”: not supported</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Reviewer workflow, graphical workflow log: not supported</td>
</tr>
</tbody>
</table>

SAP Customer Relationship Management 7.0 Including SAP Enhancement Package 4
Migration from SAP CRM 5.0 to SAP CRM 7.0 EHP4
Advanced Workflow Inbox

In this release, you can use an alternative version of the CRM WebClient UI based workflow inbox within the SAP CRM Worklist. This alternative version provides filter capabilities like usual search pages in the CRM WebClient UI that follow the advanced search pages UI concept.

You can use this alternative version of the CRM WebClient UI based workflow inbox can by activating business function **CRM_WFI_FILTER_1**.

When activating this business function, you also activate an alternative version of the CRM home page tile that displays workflow tasks. Here the alternative version retrieves and shows only the five newest workflow tasks that are assigned to the current user as a processor.

The alternative version does not remove any restrictions shown the previous table.

Workflows for Objects

In this release, you can view the tasks of workflows that are related to a business object. You can view these workflow tasks in a CRM WebClient UI assignment block within the overview page of the business object if you have implemented an integration of the UI block into the overview page. For more information, see SAP Note **1717812**.

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Enhancement in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>View tasks of workflows related to a business transaction object</td>
<td>SAP GUI</td>
<td>View tasks of workflows related to a business transaction object</td>
</tr>
<tr>
<td>View tasks of workflows related to types of CRM business objects other than business transactions</td>
<td>Not available</td>
<td>View tasks of workflows related to a business object</td>
</tr>
</tbody>
</table>

6.7.7 SAP Jam Integration

This release enables you to create groups in SAP Jam and view feeds from SAP JAM.
Enhancements

Table 51:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Enhancement in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAP Jam Feeds on Home Center</td>
<td>Not available</td>
<td>View SAP Jam personal feeds available on the following business roles:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Sales professional</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Service professional</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Marketing professional</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• IT service professional</td>
</tr>
<tr>
<td>SAP Jam Feeds on Business Object Overview Page</td>
<td>Not available</td>
<td>View SAP Jam feeds related to a business object for the following business object types:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Opportunity</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Sales quotation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Account</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Service order</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Service request or incident</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Marketing plan</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Marketing campaign</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Segmentation model</td>
</tr>
<tr>
<td>SAP Jam Groups on Business Object Overview Page</td>
<td>Not available</td>
<td>Create, update, and display SAP Jam groups related to a business object for the following business object types:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Opportunity</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Sales quotation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Account</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Service order</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Service request or incident</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Marketing plan</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Marketing campaign</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Segmentation model</td>
</tr>
</tbody>
</table>

Creation of a Campaign and Target Group from an External System

This release enables you to create a CRM campaign from an external system by a newly implemented RFC service. The service consumer can provide a list of external users (for example, social media users using the service interface). The new service uses external list management to create a target group containing the marketing prospects. The target group is assigned to the campaign.

The service consumer can request the creation of an SAP Jam group containing links to the target group and the campaign in SAP CRM.

Enhancements
Table 52:

<table>
<thead>
<tr>
<th>Function in SAP CRM 5.0</th>
<th>5.0 UI</th>
<th>Enhancement in This Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create new campaign and new SAP Jam group</td>
<td>Not available</td>
<td>The RFC service creates the following objects:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• A CRM target group containing marketing prospects from a list of external users</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• A new campaign that has the target group assigned</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• An SAP Jam group that contains links to the target group and the campaign in CRM</td>
</tr>
<tr>
<td>Create new campaign</td>
<td>Not available</td>
<td>The RFC service creates the following objects:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• A CRM target group containing marketing prospects from a list of external users</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• A new campaign that has the target group assigned</td>
</tr>
<tr>
<td>Create new campaign and reuse an existing SAP Jam group</td>
<td>Not available</td>
<td>The RFC service creates the following objects:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• A CRM target group containing marketing prospects from a list of external users</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• A new campaign that has the target group assigned</td>
</tr>
<tr>
<td></td>
<td></td>
<td>An existing SAP Jam group can be reused if it was created by an earlier call of the same service</td>
</tr>
<tr>
<td>Create new target group and assign it to an existing campaign</td>
<td>Not available</td>
<td>The RFC service creates a CRM target group containing marketing prospects from a list of external users. If the campaign was created by an earlier call of the same service, the system assigns the target group to an existing CRM campaign.</td>
</tr>
</tbody>
</table>
7 Solution-Wide Topics

7.1 Integration of SAP BusinessObjects

Use

The integration of SAP BusinessObjects Crystal Reports and SAP BusinessObjects Xcelsius in SAP Business Suite provides you with analysis functions that are integrated in the user interface and processes: Embedded Analytics.

Predefined reports and dashboards provide a detailed, graphical, or interactive display of (transaction) data from SAP Business Suite or from SAP NetWeaver BW.

Embedded Analytics contains the following integrations:

- Crystal Reports as an alternative for displaying simple lists in SAP GUI ALV Grid, Web Dynpro ABAP ALV, and POWER list (not in SAP CRM)
- Crystal Reports for the formatted display of data from queries
- Xcelsius for the graphical or interactive display of data from queries in dashboards

Users can call these functions in SAP NetWeaver Business Client, SAP NetWeaver Portal, or SAP CRM.

Technical Requirements

- Crystal Reports for Displaying Simple Lists
  You require Crystal Reports Viewer for Business Suite Applications 1.0 or higher. Note the corresponding license terms.
- Crystal Reports with Queries
  To display the Crystal Reports provided, you require SAP BusinessObjects Enterprise XI 3.1 (SP02) and SAP BusinessObjects Integration for SAP XI 3.1 (SP02). Note the corresponding license terms for SAP BusinessObjects.
  To create your own Crystal Reports, you require Crystal Reports 2008 V1 (SP02). Note the corresponding license terms.
- Xcelsius Dashboards with Queries
  To display the Xcelsius dashboards provided, you require Adobe Flash Player version 9. You must also check the license terms for SAP BusinessObjects.
  To create your own dashboards, you require SAP BusinessObjects Xcelsius Enterprise 2008 (SP03, FP1). Note the corresponding license terms for SAP BusinessObjects.

For displaying data from queries via the predefined content, the following system requirements also apply:

- SAP NetWeaver 7.0 including enhancement package 2 (SP04) or higher
- SAP NetWeaver 7.0 BI Content Add-On 5 or higher
- Extension for SAP NetWeaver 7.02 BI Content Add-On 5 or higher

More Information

For more information about the different topics, see the information sources in the following table.
Table 53:

<table>
<thead>
<tr>
<th>Topic</th>
<th>Information Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Installation Information</td>
<td>SAP Help Portal at <a href="http://help.sap.com/Analytics">http://help.sap.com/Analytics</a> All Products</td>
</tr>
<tr>
<td>Configuration Information</td>
<td>SAP Solution Manager under Solutions/Applications Basic Configuration Embedded Analytics</td>
</tr>
<tr>
<td>Installation Instructions</td>
<td>SAP Notes 1353044 (Crystal Reports Viewer for Business Suite Applications 1.0) and 1345320 (Crystal Reports with Queries)</td>
</tr>
</tbody>
</table>

7.2 Service-Oriented Architecture (SOA)

7.2.1 Introduction

SAP's delivery on SOA (service-oriented architecture) differs from the pure architectural concept of SOA in the delivery of ready-to-use enterprise services. Enterprise services are SAP-defined Web services which provide end-to-end business processes or individual business process steps that can be used to compose business scenarios while ensuring business integrity and ease of reuse. SAP designs and implements enterprise service interfaces to ensure semantic harmonization and business relevance. This section deals with the service-enablement of SAP Business Suite 7.

7.2.2 Service Enablement

The service enablement of SAP Business Suite consists of one or more of the following SAP components:

- **SAP Business Suite 7**
  Enterprise services are an integral part of the software components of the SAP Business Suite applications. Enterprise services are the technical interfaces to the functionality available in the business application.

- **SAP NetWeaver PI 7.0 or higher**
  SAP NetWeaver Process Integration (SAP NetWeaver PI) is an open integration and application platform that provides tools enabling you to set up a service-oriented architecture for business applications. You can use the platform for providing, discovering, and consuming services, integrating applications using the integration
server, and managing business processes. Process integration is required in a runtime environment to consume enterprise services in a mediated scenario. We recommend that you use the highest version of SAP NetWeaver Process Integration (PI). For more information, see SAP Note 1515223 and SAP Note 1388258.

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**Note**

Starting with SAP NetWeaver Process Integration (PI) 7.3, SAP provides a new installation option Advanced Adapter Engine Extended (AEX). Since AEX is based on AS Java alone, it is easier to install and maintain as well as it needs less memory and data storage. Therefore, AEX is a cost-saving option compared to a full installation of SAP NetWeaver PI. For more information about the AEX, enter the phrase *Advanced Adapter Engine Extended* in the documentation of SAP NetWeaver Process Integration at [http://help.sap.com/nw73](http://help.sap.com/nw73) and see SAP Note 1573180.

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**Note**

Asynchronous services that are enabled for *Web Services Reliable Messaging (WS-RM)* can be called in a point-to-point communication scenario. Otherwise asynchronous services can only be consumed in a mediated scenario.

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- **Enterprise Services Repository**
  The Enterprise Services Repository (ES Repository) is the central repository that contains the definition of all enterprise services and models. The ES Repository is shipped with SAP NetWeaver PI and with SAP NetWeaver Composition Environment (CE) starting with SAP NetWeaver PI 7.1 and with SAP NetWeaver CE 7.1. The Enterprise Services Repository is a design time environment that enables you to create and enhance enterprise service definitions.

  **Note**
  
  In a SAP NetWeaver 7.0x landscape you use the Integration Repository to create and enhance enterprise service definitions.

- **Services Registry**
  The Services Registry is shipped with SAP NetWeaver PI and SAP NetWeaver CE starting with SAP NetWeaver PI 7.1 and SAP NetWeaver CE 7.1. The Service Registry is only required for the publication of enterprise service end-points (Web services) that have been configured and activated in the SAP Business Suite.

- **SAP NetWeaver CE 7.1 or higher**
  The SAP NetWeaver Composition Environment (SAP NetWeaver CE) provides a robust environment for the design and implementation of composite applications. The design time environment of SAP NetWeaver CE can be used for the model-driven design and development of composite applications based on enterprise services. SAP NetWeaver CE offers the tools and the environment necessary for running composite applications fast and efficiently in a runtime environment.

---

### 7.2.3 Installation of the Service-Oriented Architecture (SOA)

The installation of service interfaces, and therefore the service enablement of SAP Business Suite, consists of one or more of the following phases:

- **Identification of software components and required business functions**
You use the technical data section of the enterprise service documentation to identify the following data for each enterprise service:
- the software component version with which the service was shipped
- the business function(s) required to be activated

- **Identification of technical usages** (relevant for SAP ERP only)
  SAP Note 1818596 provides a mapping of business functions and software component versions to technical usages. You use this documentation to identify the required technical usages for your list of software component versions and business functions.

- **Installation of the software component ECC-SE** (relevant for SAP ERP only)
  The software component ECC-SE contains service implementations for ECC (the ERP Central Component). This component must be explicitly installed if you intend to use enterprise services for ECC functionality. In this case you must also select the technical usage “ESA ECC-SE” during the enhancement package installation.

- **Selection and installation together with the other parts of the enhancement package**
  In the enhancement package installation process you must select all the technical usages you have identified for service enablement together with the technical usages you identified for enhanced features in SAP Business Suite. The selected technical usages will install the corresponding software components that contain the enterprise services interfaces and business functions.

- **Import of ESR Content (aka XI Content)** (optional)
  To install the content required for the enterprise service definitions you must select the technical usage “XI Content” in the enhancement package installation process. This usage type downloads the content files for SAP NetWeaver PI 7.0 or higher. Unpack the ZIP file and copy the tpz files corresponding to your SAP NetWeaver PI version into the import directory of your Integration Repository (for SAP NetWeaver PI 7.0x) or Enterprise Services Repository (for SAP NetWeaver ES Repository 7.1 or higher). Use the import function to import the content files into the corresponding repository (Integration Repository or Enterprise Services Repository). (Choose |> Tools | Import Design Objects |

- **Services Registry** (optional)
  The services registry is shipped starting with SAP NetWeaver PI 7.1 and CE 7.1. You must configure the services registry and then publish the enterprise services from the Business Suite application to the registry using the transaction SOAMANAGER in the backend.
  For further information regarding the SAP NetWeaver PI, CE and ES Repository, refer to the corresponding SAP NetWeaver Installation and Master Guides.

### 7.2.4 Related Documentation

For more information about the service-oriented architecture (SOA), see the following information sources:
- SCN Community in the SAP Network at https://scn.sap.com/community/soa (registration required)
- SAP Note 1359215: Technical prerequisites for using enterprise services (relevant for ERP only)
- SAP note 838402: Problems with non-Unicode system landscapes
7.3 Developing and Modifying Applications: SAP NetWeaver Development Infrastructure

To modify or extend CRM Java Web applications, you use the SAP NetWeaver Development Infrastructure (NWDI). The NWDI supports integration of patches, support packages, and upgrades to new releases without losing modifications or enhancements and also supports team development. NWDI requires a local installation on developers' PCs and the installation of a central infrastructure for version management, application building, and administration of the Java development landscape.

**Local Installation**

- SAP NetWeaver Developer Studio: The SAP NetWeaver Developer Studio tool provides access to the NWDI (also named Development Infrastructure). It enhances the concept of an integrated development environment with server-side services, which centrally provides the development teams with a consistent development environment and supports the software development during the entire life cycle of a product.
- Local J2EE Engine (SAP NetWeaver Application Server Java)

**Central Infrastructure**

- Design Time Repository (DTR): versioning source code management, distributed development of software in teams, transport and replication of sources
- Component Build Service (CBS): central build based on the component model
- Change Management Service (CMS): central administration of the Java development landscape and transports covering the entire software life cycle
- Software Deployment Manager (SDM): manual and automatic deployment of archives in central runtime systems
- System Landscape Directory (SLD): information about the system landscape
- Name Service: central check instance for the uniqueness of names
- Java Dictionary: supports the global definition of tables and data types
- SAP Java Test Tools: predefined static tests and runtime tests for the Java development


For more information about modifying and extending SAP CRM Java components, see the SAP E-Commerce 7.54 Development and Extension Guide and the corresponding tutorial available on SAP Service Marketplace at [http://service.sap.com/crm-inst](http://service.sap.com/crm-inst) [SAP CRM 7.0 <release> Operate](http://service.sap.com/crm-inst).
7.4 Customizing Scout

Use

Customizing Scout is part of SAP Solution Manager, meaning that no additional installation is required. Customizing Scout compares and updates Customizing settings.

Customizing Scout is relevant for all key capabilities and supports the following process:

- Customizing data is loaded initially from SAP ERP to SAP CRM by using the CRM Middleware download.
- The Customizing entries can be compared between SAP ERP and SAP CRM and any differences visualized.
- Deltas are kept synchronized. This means that when Customizing settings are maintained in SAP ERP, they are also updated in SAP CRM.
- Customizing settings are transported through the test and production system landscape.

More Information

http://support.sap.com/solutionmanager

7.5 Application Enhancement Tool

Use

The Application Enhancement Tool (AET) allows you to create new fields and tables, and as such is the successor to the Easy Enhancement Workbench (EEW).

It is integrated into the UI Configuration Tool and can be started from there. The fields that you have added to an application are available in the UI configuration of the corresponding UI component and view. You can make these new fields available on the user interface by adding them to the view.

Note

The EEW is still supported. With already existing CRM enhancements, you must use the EEW for regeneration since they cannot be migrated to the AET. With new CRM enhancements, we recommend using the AET, but you may also continue using the EEW.
Features

The AET offers the following main functions:

- Creating custom fields or tables
- Defining dropdown list boxes for custom fields
- Translating field labels and entries in dropdown list boxes
- Assigning search helps and check tables to custom fields
- Making new custom fields available in search criteria and/or result lists, Business Warehouse (BW) reporting, R/3 Adapter, CRM Mobile, and CRM interactive reporting, which depends on the enhanced business object
- Using different data types, such as characters, dates, times, and numbers
- Reusing fields in other business objects, if these business objects are based on the same enhancement place

More Information


7.6 Easy Enhancement Workbench

Use

Easy Enhancement Workbench is a tool that supports the enhancement of CRM objects without programming knowledge. It simplifies the customer’s development process and reduces errors by providing automatic generation techniques as well as a guided concept.

Easy Enhancement Workbench provides a number of predefined business objects and enhancement scenarios.

Features

Easy Enhancement Workbench includes the following features:

- Project workbench enabling customers to manage CRM enhancements easily
- Predefined business objects and enhancement scenarios
- Wizards that allow you to define extensions intuitively without detailed knowledge of the CRM data model
- Automatic generation of internal objects without modification and that are ready for transport

The following extensions are possible for the Business Partner object:

- Support of new tables with 1:1 and 1:n relation to Business Partner main table
- Enhanced user interface definitions by optional use of Visual Configuration Tool
Easy Enhancement Workbench offers the following benefits:

- Ease of use and multiple wizards
- No modifications
- No in-depth knowledge of the CRM internal data model required

More Information


7.7 Monitoring the System Landscape

To monitor your system landscape, use the SAP NetWeaver monitoring infrastructure. After you have installed all required components, configure the monitoring. For more information, see the guides required for operating your SAP NetWeaver system on SAP Service Marketplace at [http://service.sap.com/instguides > SAP NetWeaver > Operations](http://service.sap.com/instguides > SAP NetWeaver > Operations).

The setup of monitoring features is a prerequisite for performing the monitoring activities for your SAP CRM landscape. For more information about analysis tools for different systems, components, and scenarios, see the application operations guide on SAP Service Marketplace at [http://service.sap.com/crm-inst > Operate](http://service.sap.com/crm-inst > Operate).
A Appendix

A.1 SAP Notes

The following table includes all SAP Notes mentioned in this Master Guide:

Table 54:

<table>
<thead>
<tr>
<th>Area</th>
<th>SAP Note Number</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>337623</td>
<td>Customizing after installation or upgrade</td>
</tr>
<tr>
<td>General</td>
<td>1613657</td>
<td>Changes that you must take into account when you upgrade to avoid syntax errors and runtime errors.</td>
</tr>
<tr>
<td>General</td>
<td>837413</td>
<td>Support Package levels for CRM installations/ upgrades</td>
</tr>
<tr>
<td>General</td>
<td>1648480</td>
<td>Information on maintenance of SAP Business Suite 7</td>
</tr>
<tr>
<td>General</td>
<td>1388258</td>
<td>Version Interoperability within the SAP Business Suite</td>
</tr>
<tr>
<td>General</td>
<td>1000822</td>
<td>Overview: Notes for the Add-ons BI_CONT and BI_CONT_XT</td>
</tr>
<tr>
<td>General</td>
<td>1874939</td>
<td>SAP Business Suite for SAP NetWeaver 7.4 Hub Systems</td>
</tr>
<tr>
<td>General</td>
<td>2254192</td>
<td>Browser Compatibility of SAP CRM 7.0 EhP4</td>
</tr>
<tr>
<td>CRM Interactive Reporting</td>
<td>1110780</td>
<td>FAQ for CRM Interactive Reporting</td>
</tr>
<tr>
<td>CRM Interactive Reporting</td>
<td>1401472</td>
<td>Setting up BI reporting along with Interactive reporting</td>
</tr>
<tr>
<td>Cross-component</td>
<td>2171335</td>
<td>EHP4 for SAP CRM 7.0 SP stacks – Release Information &amp; Information Note</td>
</tr>
<tr>
<td>Cross-component</td>
<td>1371027</td>
<td>Delivery of TERM and GLOSSARY Texts in SAP_BASIS 7x Products</td>
</tr>
<tr>
<td>Cross-component</td>
<td>2168082</td>
<td>EHP4 for SAP CRM 7.0: Compatible Add-ons</td>
</tr>
<tr>
<td>Area</td>
<td>SAP Note Number</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Cross-component</td>
<td>1791023</td>
<td>Additional Checks in Landscape Verification Wizard</td>
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<tr>
<td>Internet Pricing and Configurator</td>
<td>854170</td>
<td>Switching on component VM Container</td>
</tr>
<tr>
<td>Migration</td>
<td>1037748</td>
<td>Enhancing the CRM WebClient UI for business transactions</td>
</tr>
<tr>
<td>Migration</td>
<td>1026956</td>
<td>Products / objects: search extension</td>
</tr>
<tr>
<td>Migration</td>
<td>1088910</td>
<td>CRM WebClient UI: Additional fields in product header view</td>
</tr>
<tr>
<td>Migration</td>
<td>1026475</td>
<td>Products / Objects: assignments not visible on overview page</td>
</tr>
<tr>
<td>Migration</td>
<td>976438</td>
<td>Migration of existing mapping formats</td>
</tr>
<tr>
<td>Migration</td>
<td>817119</td>
<td>Naming SAP E-Commerce / SAP CRM WebClient</td>
</tr>
<tr>
<td>Migration</td>
<td>980915</td>
<td>XML export only possible to application server file system</td>
</tr>
<tr>
<td>Migration</td>
<td>988965</td>
<td>Proxy error message</td>
</tr>
<tr>
<td>Migration</td>
<td>1457223</td>
<td>Collaborative Contract Negotiation not available</td>
</tr>
<tr>
<td>Migration</td>
<td>837413</td>
<td>Support Package Levels for CRM Installations/Upgrades</td>
</tr>
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<td>Support Package Levels for SAP NetWeaver Installations/Upgrades</td>
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<td>Subject Codes Not Available on Web-UI in Service Order</td>
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<td>Central Release Note for Software Logistics Toolset</td>
</tr>
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<td>Migration</td>
<td>2197259</td>
<td>Additional Information About the Update/Upgrade to SAP NetWeaver 7.5 (Including SPs and SRs)</td>
</tr>
<tr>
<td>Migration</td>
<td>1620472</td>
<td>Information on different results over time in stack XML calculation</td>
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<tr>
<td>Partner Channel Management</td>
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<td>Partner Channel Management Authorization Roles</td>
</tr>
<tr>
<td>Area</td>
<td>SAP Note Number</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-----------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Partner Channel Management</td>
<td>1111654</td>
<td>Partner Channel Management Upgrade from CRM 5.0</td>
</tr>
<tr>
<td>Partner Channel Management</td>
<td>1119251</td>
<td>Partner Channel Management Upgrade: New BP role PRCONT</td>
</tr>
<tr>
<td>Partner Channel Management</td>
<td>1119661</td>
<td>Partner Channel Management Upgrade: Regenerate PDF</td>
</tr>
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<td>Process Integration</td>
<td>1515223</td>
<td>SAP NetWeaver Process Integration: Release Recommendation</td>
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<td></td>
<td></td>
<td>This SAP note sets out our recommendation on which release of SAP NetWeaver PI you should use.</td>
</tr>
<tr>
<td>Process Integration</td>
<td>836200</td>
<td>SAP NetWeaver 7.0: Importing process integration content.</td>
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<td>Portfolio and Project Management</td>
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<td>FAQs - SAP Portfolio and Project Management 6.1</td>
</tr>
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<td>2026050</td>
<td>PPM 6.1: Support package information, notes, and schedule</td>
</tr>
<tr>
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<td>Additional information for installation/upgrade of CPRXRPM 610_740</td>
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<tr>
<td>Portfolio and Project Management</td>
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<td>Support Packages for CPRXRPM 610_740</td>
</tr>
<tr>
<td>SAP Organizational Management</td>
<td>1635858</td>
<td>Multiple implementations under BAdI HRALE00INBOUND_IDOC in CRM system - SINGLE_EXIT_MULTIPLY_ACTIVE</td>
</tr>
<tr>
<td>SAP GUI</td>
<td>147519</td>
<td>Maintenance strategy / deadlines ‘SAP GUI’</td>
</tr>
<tr>
<td>SAP HANA</td>
<td>1514967</td>
<td>Essential information about SAP HANA</td>
</tr>
<tr>
<td>SAP HANA</td>
<td>1514966</td>
<td>Sizing information about SAP HANA.</td>
</tr>
<tr>
<td>SAP HANA</td>
<td>1681092</td>
<td>System landscape and deployment configuration planning for SAP HANA</td>
</tr>
<tr>
<td>SAP HANA</td>
<td>855534</td>
<td>Important information about the use of dual-stack system deployment for SAP Business Suite 7</td>
</tr>
<tr>
<td>SAP HANA</td>
<td>1797362</td>
<td>Important information about corrections to documentation about dual-stack split for SAP systems</td>
</tr>
<tr>
<td>Area</td>
<td>SAP Note Number</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-----------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>SAP HANA</td>
<td>1655335</td>
<td>Recommendations for using the dual-stack split tool</td>
</tr>
<tr>
<td>SAP HANA</td>
<td>2171335</td>
<td>Information about applying the support package (SP) stack for SAP CRM</td>
</tr>
<tr>
<td>SAP HANA</td>
<td>1785057</td>
<td>Information about preparatory steps for database migration to SAP HANA</td>
</tr>
<tr>
<td>SAP HANA</td>
<td>1051576</td>
<td>Information about conversion to Unicode (including references to additional notes describing the conversion to Unicode from ambiguous blended code page systems)</td>
</tr>
<tr>
<td>SAP HANA</td>
<td>1788581</td>
<td>Information about transparent tables after migration to SAP HANA</td>
</tr>
<tr>
<td>SAP HANA</td>
<td>1798895</td>
<td>Information about manual corrections for SAP HANA objects</td>
</tr>
<tr>
<td>SAP NetWeaver</td>
<td>1040325</td>
<td>HTTP load balancing: Message Server or Web Dispatcher?</td>
</tr>
<tr>
<td>SAP Business Warehouse (SAP BW)</td>
<td>153967</td>
<td>BI Content Release Strategy</td>
</tr>
<tr>
<td>Segmentation</td>
<td>1565886</td>
<td>Missing number ranges in segmentation after upgrade</td>
</tr>
<tr>
<td>System Landscape Directory</td>
<td>669669</td>
<td>Updating the SAP Component Repository in the System Landscape Directory (SLD)</td>
</tr>
<tr>
<td>Workforce Deployment</td>
<td>1246105</td>
<td>CRM 7.0 Resource Planning and LiveCache component</td>
</tr>
<tr>
<td>Workforce Deployment</td>
<td>830595</td>
<td>Installing WFMCORE 200</td>
</tr>
<tr>
<td>Workforce Deployment</td>
<td>836414</td>
<td>Installing LCAPPS 2005_700</td>
</tr>
</tbody>
</table>
A.2 Related Information

The following links provide you with important information for your SAP CRM implementation project:

Table 55:

<table>
<thead>
<tr>
<th>Content</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sizing guidelines</td>
<td><a href="http://service.sap.com/quicksizer">http://service.sap.com/quicksizer</a></td>
</tr>
<tr>
<td>Information about released platforms and technology-related topics</td>
<td><a href="http://service.sap.com/platforms">http://service.sap.com/platforms</a> To access the Product Availability Matrix directly, enter <a href="http://support.sap.com/pam">http://support.sap.com/pam</a></td>
</tr>
<tr>
<td>Information about network security</td>
<td><a href="http://service.sap.com/securityguide">http://service.sap.com/securityguide</a></td>
</tr>
</tbody>
</table>

A.3 Industry Solution Master Guides

For information about the industry solutions that use SAP CRM, see the industry solution master guides on SAP Service Marketplace at http://service.sap.com/instguides Industry Solutions Industry Solution Guides.

A.4 Accessing SAP Library

For more information about SAP CRM, access SAP Library from any of the following:


  Note
  SAP Help Portal contains the latest version of SAP Library. Therefore, we recommend that you use this channel to access SAP Library.

- An SAP system if you have installed the online documentation:
  Choose Help SAP Library.

  The help files on the online documentation CDs or DVDs.
  If you want to view the help files in HTMLHelp format from the online documentation CDs or DVDs, you need a PC running Microsoft Windows to install the HTMLHelp Viewer.
A.5 Tools and Resources for Planning Your System Landscape

To plan your system landscape, you can use a few tools and resources that are available to you as SAP customer.

Tools

On SAP Service Marketplace, we provide the Business Process Repository (BPR) Viewer to look up descriptions of business scenarios and business processes.

In addition, there are tools in SAP Solution Manager that support you before, during, or after the installation of your SAP product or SAP enhancement package.

These tools include:

Table 56: Tools for Supporting Installations and Upgrades

<table>
<thead>
<tr>
<th>Tool</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Solution Manager System Landscape (transaction SMSY)</td>
<td>To model and set up your system landscape</td>
</tr>
<tr>
<td>SAP Solution Manager Maintenance Optimizer (transaction DSWP)</td>
<td>To install support packages and SAP enhancement packages</td>
</tr>
<tr>
<td>Business Process Repository</td>
<td>To access configuration documentation, links to Customizing activities</td>
</tr>
<tr>
<td></td>
<td>and master data transactions, specifically tailored for individual</td>
</tr>
<tr>
<td></td>
<td>business processes, business scenarios, or implementable steps</td>
</tr>
<tr>
<td>Business Process Change Analyzer (available with SAP</td>
<td>To analyze the effects of transports and support packages as well</td>
</tr>
<tr>
<td>enhancement package 1 for SAP Solution Manager 7.0)</td>
<td>as activation logs for business functions</td>
</tr>
</tbody>
</table>

Note

You require at least one of the following versions of SAP Solution Manager.

- SAP Solution Manager 7.0 EHP1, SPS 23 or higher
- SAP Solution Manager 7.1, SPS 05 or higher

SAP Solution Manager 7.0 EHP1, SPS 23 supports all update and maintenance processes (for example, transaction SMSY or Maintenance Optimizer) There is no need to upgrade to SAP Solution Manager 7.1.

For more information, see SAP Service Marketplace at [http://service.sap.com/solutionmanager](http://service.sap.com/solutionmanager).
SAP Solution Manager: Implementation Content

To get implementation content that supports you during the configuration of your business processes and business scenarios, you need the SAP Solution Manager add-on Implementation Content ST-ICO 150_700 (SP38).

Landscape Verification for SAP Solutions Manager

To verify and correct your system landscape SAP highly recommends that you use Landscape Verification 1.0 for SAP Solution Manager 7.0, which is an add-on to your SAP Solution Manager 7.0 system. This add-on allows you to identify and correct issues in your SAP Solution Manager landscape (transaction SMSY) before they cause problems, for example during a system update. Examples for errors are a missing connection to the System Landscape Directory or the wrong assignment of products to technical systems. For each type of error, a generic description for the solution is provided.

For more information about the landscape verification add-on, see SDN at http://www.sdn.sap.com/irj/sdn


Planning Guide – SAP Business Suite Landscape Implementation

To get an overview of the necessary steps for planning a system landscape, use the Planning Guide - SAP Business Suite Landscape Implementation on SAP Service Marketplace at http://service.sap.com/instguides under SAP Business Suite Applications. The guide also provides you with more information about the following:

- Examples of reference system landscapes
- Planning tools such as the business process repository
- Deployment options
- Typical implementation process

A.5.1 Business Process Repository (BPR) Viewer

The business process repository viewer (BPR viewer) is a tool on SAP Service Marketplace that allows you to preview the existing business scenarios, business processes that are shipped as part of SAP Solution Manager content. You can make use of the information in SAP Solution Manager during your implementation project by taking the pre-delivered implementation content as the starting point for your project scope. The implementation content is delivered with the following assigned information:

- Description of the business scenario, process, or implementable step
- Configuration content (Customizing activities or configuration documentation)
### A.5.2 Using the BPR Viewer

#### Calling Up the BPR Viewer

You can call up the BPR viewer directly using the Internet address [https://implementationcontent.sap.com/bpr](https://implementationcontent.sap.com/bpr). Alternatively, you can also call up the Internet address [http://service.sap.com/bpr](http://service.sap.com/bpr) first, to see more background information about the BPR viewer and additional material on SAP Service Marketplace.

#### Working with the BPR Viewer

To call up information about business scenarios, business processes, or implementable steps, navigate the following paths in the BPR viewer:

<table>
<thead>
<tr>
<th>BPR Object</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business scenario</td>
<td>Under Solutions/Applications</td>
</tr>
<tr>
<td>Business process</td>
<td>Under Organizational Areas</td>
</tr>
<tr>
<td>Implementable step</td>
<td>Under Solutions/Applications</td>
</tr>
</tbody>
</table>

For each business scenario, business process, or implementable step, you can select between different versions that depend on varying components and releases. To display the descriptions of a business scenario, business process, or implementable step, choose the **Documentation** tab page. To display configuration documentation, choose the **Configuration** tab page.

#### Note

The BPR Viewer displays all descriptions, but only a selection of the configuration documentation. To view all configuration documentation, install and use SAP Solution Manager at your customer site.
Important Disclaimers and Legal Information

Coding Samples

Any software coding and/or code lines / strings ("Code") included in this documentation are only examples and are not intended to be used in a productive system environment. The Code is only intended to better explain and visualize the syntax and phrasing rules of certain coding. SAP does not warrant the correctness and completeness of the Code given herein, and SAP shall not be liable for errors or damages caused by the usage of the Code, unless damages were caused by SAP intentionally or by SAP’s gross negligence.

Accessibility

The information contained in the SAP documentation represents SAP’s current view of accessibility criteria as of the date of publication; it is in no way intended to be a binding guideline on how to ensure accessibility of software products. SAP in particular disclaims any liability in relation to this document. This disclaimer, however, does not apply in cases of willful misconduct or gross negligence of SAP. Furthermore, this document does not result in any direct or indirect contractual obligations of SAP.

Gender-Neutral Language

As far as possible, SAP documentation is gender neutral. Depending on the context, the reader is addressed directly with “you”, or a gender-neutral noun (such as “sales person” or “working days”) is used. If when referring to members of both sexes, however, the third-person singular cannot be avoided or a gender-neutral noun does not exist, SAP reserves the right to use the masculine form of the noun and pronoun. This is to ensure that the documentation remains comprehensible.

Internet Hyperlinks

The SAP documentation may contain hyperlinks to the Internet. These hyperlinks are intended to serve as a hint about where to find related information. SAP does not warrant the availability and correctness of this related information or the ability of this information to serve a particular purpose. SAP shall not be liable for any damages caused by the use of related information unless damages have been caused by SAP’s gross negligence or willful misconduct. All links are categorized for transparency (see: http://help.sap.com/disclaimer).