

SAP Customer Relationship Management 7.0 Including SAP Enhancement Package 2

**Using SAP CRM 7.0, SAP ERP 6.0, and SAP NetWeaver 7.0 including SAP
enhancement package 3**



Document History

Caution

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

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

Table 1

Version	Date	Description
1.00	2011-11-08	First version
1.01	2012-01-27	The section Service Order Management has been updated.
1.02	2012-05-07	<ul style="list-style-type: none">Changes regarding SAP NetWeaver Process Integration.Update on upgrade information of SAP Customer Relationship Management 4.0 in section <i>Overall Upgrade Sequence</i>.
1.03	2013-04-25	<ul style="list-style-type: none">Updated hyperlinks and navigation paths throughoutSAP Note 1635858 added to the list of SAP NotesAdded a reference to SAP Web Channel Experience Management in the section <i>CRM Web Channel</i> to differentiate between the two Web shop solutionsAdded section on <i>Advanced Workflow Inbox</i>Added section on <i>Workflows for Objects</i>Added section on <i>SAP Jam Integration</i>
1.04	2013-07-31	<ul style="list-style-type: none">Removed outdated SAP Notes.Removed chapter <i>SAP CRM Business Scenarios</i>. For information about SAP CRM business scenarios, see SAP Solution Manager.Added SAP Note 1637366 and SAP Note 1732061 to section <i>Overall Implementation Sequence</i> and section <i>Overall Upgrade Sequence</i>.Removed reference to <i>Web Auctions: Selling via eBay in CRM</i> from step 2 of the procedure in section <i>Overall Implementation Sequence</i> as this scenario is no longer actively released.
1.05	2013-12-05	Added information to the section <i>Developing and Modifying Applications: SAP NetWeaver Development</i> about checking the SAP NetWeaver Upgrade Master Guide if you are planning a NetWeaver upgrade. The SAP NetWeaver Upgrade Master Guide contains specific information about SAP NetWeaver prerequisites, upgrade paths, and upgrade dependencies.
1.06	2014-02-27	The Scenario & Process Component List (SCL/PCL) is no longer offered. All references to the SCL/PCL have been removed from the guide (for example, from the section <i>Tools and Resources for Planning Your System Landscape</i>).
1.07	2016-04-13	<ul style="list-style-type: none">Clarified content about installing CRM Application Server ABAP and TREX in section <i>Overall Implementation Sequence</i>.

Version	Date	Description
		<ul style="list-style-type: none">Updated navigation paths and release information throughout the guide.

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1 About This Document

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 \[page 97\]](#) for references to further information sources.

The Master Guide consists of the following main sections:

- [Installation and Upgrade of SAP Enhancement Packages \[page 9\]](#)
This section introduces you to the concept of SAP enhancement packages and describes how to implement them.
- [SAP CRM Overview \[page 22\]](#)
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 \[page 85\]](#)
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 service.sap.com/crm-inst .

Constraints

- The business scenarios that are presented here serve as examples of how you can use SAP software in your company. The business scenarios are only intended as models and do not necessarily run the way they are described here in your customer-specific system landscape. Ensure that you check your requirements and systems to determine whether these scenarios can be used productively at your site. Furthermore, we

recommend that you test these scenarios thoroughly in your test systems to ensure they are complete and free of errors before going live.

- 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

i Note

The text in this chapter refers to the installation and update of SAP enhancement packages for SAP CRM 7.0. The release SAP CRM 7.0 is the main release that is underlying the available enhancement packages. Whenever the term *SAP system* is mentioned in this section, it refers to SAP CRM 7.0.

2.1 Enhancement Package Key Concept

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.

i 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 EHP installation are **automatically included** into the download queue by the Maintenance Optimizer, as well as the latest available Support Packages for the enhancement package.

Tools

The enhancement package installation requires the following tools:

- **SAP Solution Manager**

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

SAP recommends that you use SAP Solution Manager 7.1, SPS 10 or higher.

For more information, see SAP Support Portal at support.sap.com/solutionmanager .

- **Maintenance Planner**

Through Maintenance Planner, SAP Solution Manager allows you to maintain your system landscape and plan changes in the system landscape.

To ensure availability of landscape data in Maintenance Planner, follow the steps described in the SDN *Maintenance Planner – Prerequisites and Initial Setup* at scn.sap.com/community/it-management/alm/blog/2015/07/10/maintenance-planner-prerequisites-and-initial-setup.

- **Installation and Update Tools**

Installation or upgrade tools (depending on your scenario).

For the new installation of an SAP system including an enhancement package you use the standard installation tool Software Provisioning Manager (SWPM).

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).

For more information about SWPM and SUM, see the documentation at help.sap.com/slttoolset.

2.2 Key Facts About Enhancement Packages

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.

i 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 service.sap.com/alm.

The processes are described in the following sections:

- [Planning for Installation, Update, and Upgrade Processes \[page 13\]](#)
- [Implementation of the Installation Process \[page 16\]](#)
- [Implementation of the Update Process \[page 18\]](#)
- [Implementation of the Upgrade Process \[page 20\]](#)

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.


i 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

Steps	Step Description	Documentation
Scope and Requirements	<p>Define your business scope, such as business scenarios and business functions you want to use.</p> <p>You can find information about scope topics at the Enhancement Package Info Center [1].</p> <p>The SAP Solution Browser Tool gives you a summary of key functional changes between two releases or SAP enhancement packages [2].</p> <p>You can find detailed information about business functions on the SAP Help Portal [3].</p>	<ol style="list-style-type: none"> 1. service.sap.com/crm-ehp ↗ 2. solutionbrowser.erp.sap.fmpmedia.com ↗ 3. help.sap.com/crm-core ↗ > <Choose a release> > <i>Application Help</i> > <i>SAP Library</i> > <i>SAP Customer Relationship Management</i> > <i>Business Functions for SAP Customer Relationship Management</i> ▾
Dependencies to Other Systems in the Landscape	<p>i Note</p> <p>Only relevant for upgrades!</p> <p>The upgrade of one SAP system might have an impact on other systems in your</p>	service.sap.com/uda ↗

Steps	Step Description	Documentation
	<p>system landscape. Check whether such dependencies exist using the Upgrade Dependency Analyzer.</p>	
<p>Landscape Planning</p>	<p>If you want to change or modify your existing system landscape, make yourself familiar with the available system landscape options.</p> <p>For detailed information about business landscape options, use the <i>Planning Guide - SAP Business Suite Landscape Implementation</i>.</p>	<p>▶ service.sap.com/instguides ▶ <i>Installation & Upgrade Guides</i> ▶ <i>SAP Business Suite Applications</i> ▶ <i>SAP CRM</i> ▶ <i>SAP enhancement package 2 for SAP CRM 7.0</i> ▶</p> <p>For more information, see SAP Note 1388258.</p>
<p>Business Functions</p>	<p>Identify the business functions that you wish to activate based on your business needs.</p> <div style="background-color: #fff9c4; padding: 10px; border: 1px solid #ccc;"> <p> Caution</p> <p>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.</p> </div>	<p>▶ help.sap.com/crm-core ▶ <i><Choose a release></i> ▶ <i>Application Help</i> ▶ <i>SAP Library</i> ▶ <i>SAP Customer Relationship Management</i> ▶ <i>Business Functions for SAP Customer Relationship Management</i> ▶</p>
<p>Hardware & Software Prerequisites</p>	<p>Check the availability of the required SPs or SP stack of the application as well as for the corresponding SAP NetWeaver release are available. 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.</p> <p>The support package equivalence levels are described in SAP Notes [1].</p>	<ol style="list-style-type: none"> 1. SP Stack notes: <ul style="list-style-type: none"> ○ SAP Note 837413 (SAP CRM) ○ SAP Note 789220 (SAP NetWeaver) 2. ▶ service.sap.com/sltoolset ▶ <i>Software Logistics Toolset 1.0</i> ▶ <i>Documentation section: System Maintenance</i> ▶ <i>Updating SAP Systems Using Software Update Manager <Version></i> ▶ 3. service.sap.com/sp-stacks

Steps	Step Description	Documentation
	<p>The SP stack implementation is also described in the Software Update Manager guide [2]</p> <p>For more information about SP stack strategy and the release schedule, see the SAP Service Marketplace [3].</p>	
	Check which platforms are supported for your target release (OS/DB dependencies) with the Product Availability Matrix.	service.sap.com/pam ➔
	Check which hardware sizing is required for your target release.	service.sap.com/sizing ➔
Solution Manager Prerequisites	<p>Make sure that your SAP Solution Manager system has at least the support package (SP) level and content:</p> <ul style="list-style-type: none"> • SAP Solution Manager 7.1 SP Stack 01 • Content: ST-ICO 150_700 SP 31 <div style="background-color: #fff9c4; padding: 5px; margin: 10px 0;"> <p>i Note</p> <p>The use of the Solution Manager Content is recommended, not mandatory.</p> </div> <p>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:</p> <ul style="list-style-type: none"> • Upgrade from source releases SAP Solution Manager 3.1 and 3.2. [1] • Update from source releases SAP Solution Manager 7.0. [2] <p>After an upgrade or update to SAP Solution Manager 7.0 EHP1, you need to do follow-up actions described in the section <i>Software Change Management</i> of the <i>Solution Operations Guide</i>. [3]</p>	<p>All SAP Solution Manager guides are available at:</p> <p>▶ service.sap.com/instguides ➔ ▶ <i>Installation & Upgrade Guides</i> ▶ <i>SAP Components</i> ▶ <i>SAP Solution Manager</i> ▶ <i>Release 7.0 EHP1</i> ▶</p> <ol style="list-style-type: none"> 1. <i>Upgrade Guide – SAP Solution Manager 7.0 incl. Enhancement Package 1</i> 2. <i>Update Guide SAP Enhancement Package 1 for SAP Solution Manger 7.0</i> 3. <i>Solution Operations Guide – SAP Solution Manager 7.0 EHP1.</i>
Add-on Compatibility	If you want to use add-ons, check their compatibility with your target release.	SAP Note 1600494 ➔
Testing	<p>You perform regression and acceptance tests.</p> <p>After the installation of an SAP enhancement package, you find additional information with the help of</p>	<ol style="list-style-type: none"> 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 <i>SAP Test Catalog</i>.

Steps	Step Description	Documentation
	<p>the Impact Analyzer tool [2] and you can access test cases for individual business functions [3].</p> <div style="background-color: #fff9c4; padding: 10px; border: 1px solid #ccc;"> <p>i Note</p> <p>Switch BC Sets are also delivered with business functions. They are automatically unpacked when you activate the business function.</p> </div>	

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 3

Sequence of Steps	Step Descriptions	Documentation
1 System Preparation	<p>Prepare your host systems, for example:</p> <ul style="list-style-type: none"> • Install and update your operating system. • Create the file systems. • Check database requirements. 	<p>See the guides on SAP Service Marketplace at ▶ service.sap.com/crm-inst ➤ <choose release> ➤ Install 📄.</p>
2 Installation Media	<p>Make the required installation media (physical or downloaded media) available.</p> <p>A list of the installation media is found in the relevant SAP NW installation guide.</p>	<p>See the guides on SAP Service Marketplace at ▶ service.sap.com/crm-inst ➤ <choose release> ➤ Install 📄.</p>
3 Installation	<p>If required, install the database with the DB-specific installer.</p> <p>Run SAPinst to install your system.</p>	<p>See the guides on SAP Service Marketplace at ▶ service.sap.com/crm-inst ➤ <choose release> ➤ Install 📄.</p>
4 Post-Installation Steps	<p>Check the relevant installation tool guides and the SAP application-specific installation information in this guide.</p>	<p>See the guides on SAP Service Marketplace at ▶ service.sap.com/crm-inst ➤ <choose release> ➤ Install 📄.</p>
5 Content Installation	<p>If required, you install SAP Business Warehouse content as an add-on as described in the relevant SAP Note.</p>	<p>SAP Note 1000822 ➤</p>
6 Solution Manager Set-Up	<p>To set up your SAP Solution Manager application, perform the following steps:</p> <ol style="list-style-type: none"> 1. Maintain system data in the SAP System Landscape Directory (SLD). 	<ol style="list-style-type: none"> 1. <i>Maintenance Planning Guide for SAP Solution Manager</i> at wiki.scn.sap.com/wiki/x/VlwqCw ➤ under the section <i>Guides</i>. 2. www.sdn.sap.com/irj/sdn/nw-sld ➤

Sequence of Steps	Step Descriptions	Documentation
	<ol style="list-style-type: none"> 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. <p>These steps are described in the Maintenance Planning Guide [1].</p> <p>For more information, see the SAP Developer Network:</p> <ul style="list-style-type: none"> • SLD information [2] • Landscape Verification tool [3] 	<ol style="list-style-type: none"> 3. <ul style="list-style-type: none"> ◦ www.sdn.sap.com/irj/sdn/alm?rid=/webcontent/uuid/70fc3790-7ec9-2d10-57ad-95b2d0d1185d ◦ You must take into account specific landscape configuration and additional checks in the landscape verification wizard. For more information, see SAP Note 1791023.
<p>7</p> <p>Support Package Installation</p>	<p>The support package (SP) equivalence levels are described in SAP Notes [1].</p> <p>Create a maintenance transaction in SAP Solution Manager to calculate support packages and packages for technical usages. Install them as needed.</p> <p>For more information about SP stack strategy, see the SAP Support Portal [2].</p> <div style="background-color: #fff9c4; padding: 10px; margin-top: 10px;"> <p>i Note</p> <p>If you have modified SAP code in your system, do not separate the installation of the SP stack and the installation of the SAP enhancement package into two steps. This would mean having to perform the modification adjustment twice (and partially for the same objects).</p> </div>	<ol style="list-style-type: none"> 1. SP Stack notes: <ul style="list-style-type: none"> ◦ SAP Note 837413 (SAP CRM) ◦ SAP Note 789220 (SAP NetWeaver) 2. support.sap.com/sp-stacks
<p>8</p> <p>Configuration</p>	<p>Configure new functions, for example new business functions, with the Solution Manager content [1].</p> <div style="background-color: #fff9c4; padding: 10px; margin-top: 10px;"> <p>i Note</p> <p>The use of the Solution Manager Content is recommended, not mandatory.</p> </div> <p>How to use the Solution Manager Content is described in the SAP Library documentation for SAP Solution Manager [2].</p>	<ol style="list-style-type: none"> 1. See the step Solution Manager Prerequisites in the planning section for the correct SAP Solution Manager content release. 2. help.sap.com/solutionmanager SAP Solution Manager <version>

Sequence of Steps	Step Descriptions	Documentation
9 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.

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 4

Sequence of Steps	Step Descriptions	Documentation
1 Solution Manager Preparation	<p>To set up your SAP Solution Manager application, perform the following steps:</p> <ol style="list-style-type: none"> 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. <p>These steps are described in the <i>Maintenance Planning Guide</i> [1].</p> <p>For more information, see the SAP Developer Network:</p> <ul style="list-style-type: none"> • SLD information [2] • Landscape Verification tool [3] 	<ol style="list-style-type: none"> 1. <i>Maintenance Planning Guide for SAP Solution Manager</i> at wiki.scn.sap.com/wiki/x/VlwqCw under the section <i>Guides</i>. 2. www.sdn.sap.com/irj/sdn/nw-sld 3. <ul style="list-style-type: none"> ◦ www.sdn.sap.com/irj/sdn/alm?rid=/webcontent/uuid/70fc3790-7ec9-2d10-57ad-95b2d0d1185d ◦ 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 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	See the user guide at apps.support.sap.com/sap/support/mp .

Sequence of Steps	Step Descriptions	Documentation
	additional product instances or software units). Download the software packages using the Download Manager.	
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 ▶▶ 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 ▶▶ service.sap.com/crm-inst ▶▶ <choose release> ▶ Upgrade ▶ .
6 Content Update	Check if you need to update content related to: <ul style="list-style-type: none"> • 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 ▶	<ol style="list-style-type: none"> 1. See the Help Portal at ▶▶ help.sap.com/sltoolset ▶▶ Software Update Manager (SUM) <Version> ▶ 2. SAP Note 1000822 ▶ 3. <ul style="list-style-type: none"> ◦ SAP Note 836200 ▶ and SAP Note 1515223 ▶ ◦ Search for <i>Release Notes for Usage Type PI</i> in the SAP product documentation at help.sap.com ▶.
7 Configuration	Configure newly installed enhancement package functions, for example new business functions with the Solution Manager content [1]. <div style="background-color: #fff9c4; padding: 5px; margin: 10px 0;"> <p>i Note The use of the Solution Manager Content is recommended, not mandatory.</p> </div> How to use the Solution Manager Content is described in the SAP Library documentation for SAP Solution Manager [2].	<ol style="list-style-type: none"> 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. 2. help.sap.com/solutionmanager ▶
8 Configuration	Perform regression and acceptance tests.	For more information, see the table entry <i>Testing</i> in the section on Planning for Installation, Update, and Upgrade Processes [page 13] in this guide.

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 5

Sequence of Steps	Step Descriptions	Documentation
1 Solution Manager Preparation	<p>To set up your SAP Solution Manager application, perform the following steps:</p> <ol style="list-style-type: none"> 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. <p>These steps are described in the <i>Maintenance Planning Guide</i> [1].</p> <p>For more information, see the SAP Developer Network:</p> <ul style="list-style-type: none"> • SLD information [2] • Landscape Verification tool [3] 	<ol style="list-style-type: none"> 1. <i>Maintenance Planning Guide for SAP Solution Manager</i> at wiki.scn.sap.com/wiki/x/VlwqCw under the section <i>Guides</i>. 2. www.sdn.sap.com/irj/sdn/nw-sld 3. <ul style="list-style-type: none"> ◦ www.sdn.sap.com/irj/sdn/alm?rid=/webcontent/uuid/70fc3790-7ec9-2d10-57ad-95b2d0d1185d ◦ 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	<p>Prepare your system as described in the documentation, for example perform OS/ DB-specific preparations.</p>	<p>See the guides on SAP Service Marketplace at service.sap.com/crm-inst > <choose release> > <i>Upgrade</i>.</p>
3 Software Calculation & Download	<p>Use the Maintenance Planner to calculate the required software packages.</p> <p>You can also select additional software packages (for example add-ons or additional product instances or software units).</p> <p>Download the software packages using the Download Manager.</p>	<p>See the user guide at apps.support.sap.com/sap/support/mp.</p>
4 SAP System Upgrade	<p>Run Software Update Manager to upgrade your system to the target release including the selected software packages.</p>	<p>See the guides on SAP Service Marketplace at service.sap.com/crm-inst > <choose release> > <i>Upgrade</i>.</p>
5 Post-Upgrade Steps	<p>Perform technical and application-specific follow-up activities after the upgrade is finished.</p>	<p>See the guides on SAP Service Marketplace at service.sap.com/crm-inst > <choose release> > <i>Upgrade</i>.</p>

Sequence of Steps	Step Descriptions	Documentation
6 Content Upgrade	<p>Check if you need to update content related to:</p> <ul style="list-style-type: none"> SAP NetWeaver Portal [1] <p>You use the Software Update Manager (SUM) to update portal content.</p> <ul style="list-style-type: none"> SAP Business Warehouse [2] SAP NetWeaver Process Integration [3] <p>For more information, see SAP Note 1388258</p>	<ol style="list-style-type: none"> See the Help Portal at help.sap.com/slttoolset > Software Update Manager (SUM) <Version> SAP Note 1000822 <ul style="list-style-type: none"> SAP Note 836200 and SAP Note 1515223 Search for <i>Release Notes for Usage Type PI</i> in the SAP product documentation at help.sap.com.
7 Configuration	<p>Configure upgraded or new functions, for example new business functions, with the Solution Manager content [1].</p> <div data-bbox="491 860 976 1003" style="background-color: #fff9c4; padding: 5px;"> <p>i Note The use of the Solution Manager Content is recommended, not mandatory.</p> </div> <p>How to use the Solution Manager Content is described in the SAP Library documentation for SAP Solution Manager [2].</p>	<ol style="list-style-type: none"> 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. help.sap.com/solutionmanager
8 Testing	<p>Perform regression and acceptance tests.</p>	<p>For more information, see the table entry Testing in the section on Planning for Installation, Update, and Upgrade Processes [page 13] in this guide.</p>

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 clients, mobile devices, the Internet, and telephones or e-mail. SAP ERP systems can be used as back-end systems, whereas SAP NetWeaver Business Warehouse (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 6

Software Unit Group	Description
CRM Core [page 23]	Software units that are essential for your CRM system landscape: <ul style="list-style-type: none">• CRM Application Server ABAP• CRM Application Server Java• WebClient UI For more information, see Developing and Modifying Applications: SAP NetWeaver Development Infrastructure [page 90] .
CRM Mobile Client Component [page 29]	Components required for a mobile system landscape
Workforce Deployment [page 34]	Component required for service orders
Standalone Components [page 35]	Components that provide additional functions. In most cases their use is optional.
Application Systems [page 37]	OLTP back end, as well as SAP NetWeaver BW, SAP SCM server, and SAP SRM server
SAP Solution Manager [page 39]	SAP Solution Manager is mandatory for an SAP CRM implementation.

Software Unit Group	Description
Content Types [page 40]	Different types of content that are available for SAP CRM, for example, content for the System Landscape Directory

i 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 [▶ service.sap.com/crm-inst](https://service.sap.com/crm-inst) ▶ *<choose release>* ▶ *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 NetWeaver 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:

- MDG FOUNDATION 731
- SAP CRM ABAP 7.02
- SAP WEB UIF 7.31
- SAP AP 7.00 (includes IPC)
- SAP_BS_FOUNDATION 731
- SAP EHP3 for SAP NetWeaver 7.0 – Application Server ABAP

- **CRM Application Server Java**

CRM Application Server Java consists of the following software components:

- CRM JAVA APPLICATIONS 7.02
- SAP EHP3 for SAP NetWeaver 7.0 – Application Server Java and Alternative Act. Instances
- SAP JAVA DATA DICTIONARY 7.02
- SAP SHARED JAVA APPLIC. 7.02

- **CRM Application Server Java NW 7.3**

CRM Application Server Java with SAP NetWeaver 7.3 (for Java hubs) consists of the following software components:

- CRM JAVA APPLICATIONS 7.32

- SAP JAVA DICTIONARY 7.32
- SAP NETWEAVER 7.3 – AS Java Extensions
- SAP SHARED JAVA APPLIC. 7.32

- **NWDI Design/Build Time Content**

NWDI Design/Build Time Content can be deployed independently of CRM Application Server Java and consists of the following software components:

- APACHE JAKARTA STRUTS 1.1
- CRM IPC MOBILE 7.02
- CRM JAVA APPLICATIONS 7.02
- CRM JAVA COMPONENTS 7.02
- CRM JAVA WEB COMPONENTS 7.02
- SAP JAVA DATA DICTIONARY 7.02
- SAP SHARED JAVA APPLIC. 7.02
- SAP SHARED JAVA COMPONENTS 7.02
- SAP SHARED WEB COMPONENTS 7.02
- TEALEAF 4.5 (installation option)

i 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.

- **NWDI Design/Build Time NW7.3**

NWDI Design/Build Time with SAP NetWeaver 7.3 (for Java hubs) consists of the following software components:

- APACHE JAKARTA STRUTS 1.1
- CRM IPC MOBILE 7.32
- CRM JAVA APPLICATIONS 7.32
- CRM JAVA COMPONENTS 7.32
- CRM JAVA WEB COMPONENTS 7.32
- SAP JAVA DATA DICTIONARY 7.32
- SAP SHARED JAVA APPLIC. 7.32
- SAP SHARED JAVA COMPONENTS 7.32
- SAP SHARED WEB COMPONENTS 7.32
- TEALEAF 4.5 (installation option)

Using CRM Core with and without CRM Java Components

You can distinguish between the following:

- CRM Core with CRM Java Components (JCRM)
- CRM Core without CRM Java Components (JCRM)

For some processes of the business scenarios, you do not need to install CRM Java Components (JCRM) 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 Java Components (JCRM):

- 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 (AS Java) for the following applications:

- SAP NetWeaver Exchange Infrastructure

The **Internet Pricing and Configurator (IPC)** functions for pricing has been integrated in the Virtual Machine Container (VMC) 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.

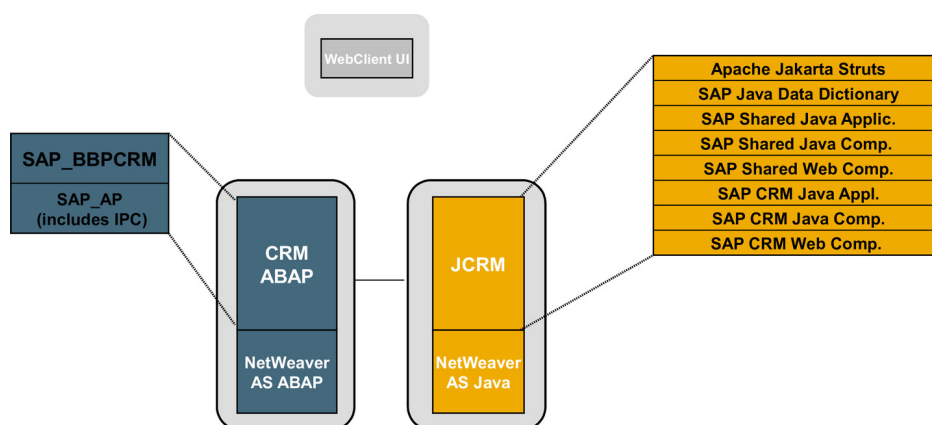


Figure 2: CRM Core with CRM Java Components (JCRM)

WebClient UI

The WebClient UI is an integrated, clearly arranged, and Web-based user interface. For more information, see the following SAP Notes:

- SAP Note [1118231](#) *Supported user interfaces for SAP CRM*
- SAP Note [1600364](#) *EHP2 for SAP CRM 7.0 Internet Browser Releases*

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
- Terminology that is suited to the new user interface

i Note

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 installation guides for EHP2 for SAP CRM 7.0 on SAP Service Marketplace at service.sap.com/instguides



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.
- CRM database

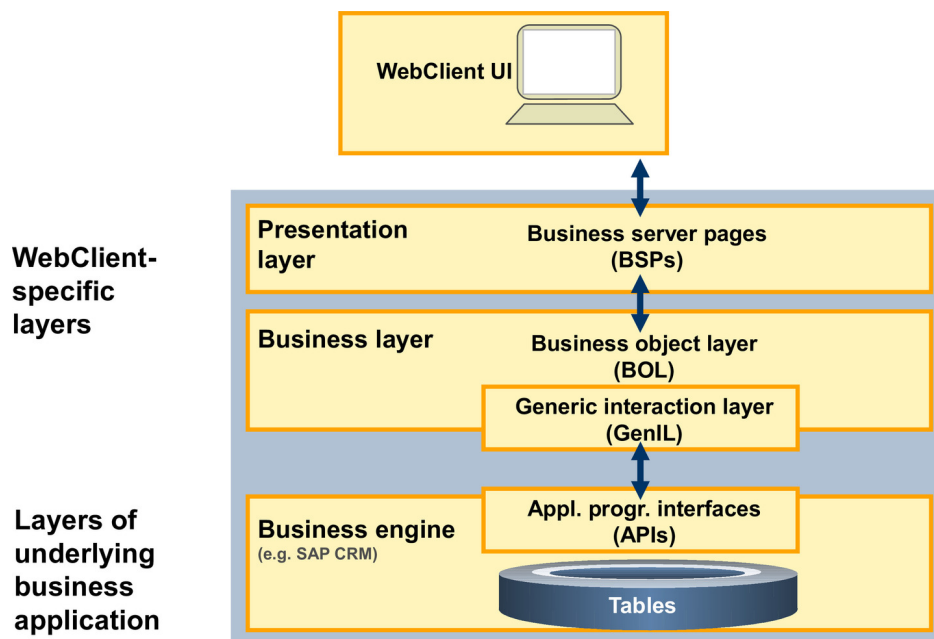


Figure 3: WebClientUI Architecture

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 sub services (transaction SICF) under the following nodes:

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

i Note

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, enter the keyword *Activating and Deactivating ICF Services* in the documentation of SAP NetWeaver under help.sap.com/nw_platform.

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
```

For more information about creating the URL for the WebClient UI, enter the keyword *Accessing a BSP Application* in the documentation of SAP NetWeaver under help.sap.com/nw_platform.

i 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

SAP NetWeaver Portal is not delivered with EHP2 for SAP CRM 7.0, however with this release you can integrate the WebClient UI in an already installed SAP NetWeaver Portal (part of EHP3 for SAP NetWeaver 7.0). 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 into EHP2 for SAP CRM 7.0, see the following:

- Customizing for Customer Relationship Management under ► [UI Framework](#) ► [Portal Integration](#) ► [Overview](#) ►
- SAP Library for Customer Relationship Management at ► [WebClient UI Framework](#) ► [Portal Integration](#) ►

The business packages for the releases SAP CRM 3.1, 4.0, and 5.0 cannot be used in EHP2 for SAP CRM 7.0 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 EHP2 for SAP CRM 7.0 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 EHP2 for SAP CRM 7.0 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 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 to EhP2 for CRM 7.0, 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 family, see SAP Developer Network at www.sdn.sap.com/irj/sdn/sap-gui, and *Master Guide – SAP NetWeaver 7.0* available on SAP Service Marketplace at service.sap.com/instguidesNW70.

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 Client Companion

Mobile Client Companion is an extension to the CRM Mobile Sales laptop application that runs on a personal digital assistant (PDA) and synchronizes data with the Mobile Sales application running on a laptop. This application is available for two industry verticals:

- Mobile Sales – Consumer Packaged Goods
- Mobile Sales – Pharmaceuticals

This application enables field sales representatives to:

- Manage their activities and appointments
- Maintain data on samples and sample distribution, and perform sample-management tasks in the pharmaceutical business scenario
- Maintain institution (business partner) and contact person details that help in maintaining marketing profiles

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 SAP Note [879643](#).

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

Table 7

System	Description
Mobile Application Repository server	Server designated for the central Mobile Application Repository and test application database
Mobile Application Studio server	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
Mobile client	Server, PC, or laptop that sales and service people use for their work
Workgroup server	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.
Workgroup client	PC or laptop that connects to the workgroup server to use the same database concurrently

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

The following figure provides an overview of the systems in a mobile system landscape:

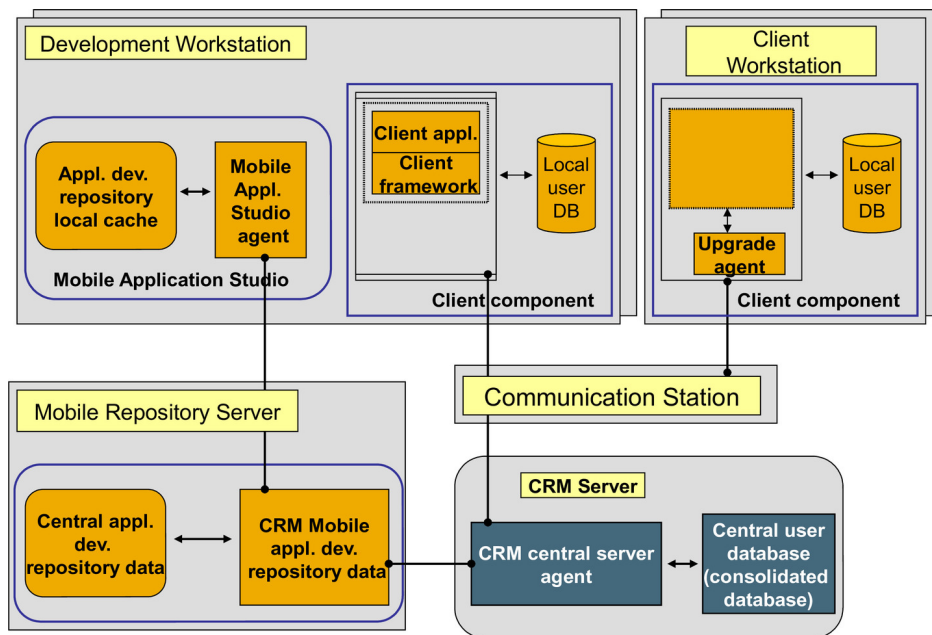


Figure 4: CRM Mobile System Landscape

4.2.3 CRM Handheld Integration

You can integrate different handheld devices with SAP CRM, such as devices based on Microsoft Windows Mobile platform, RIM BlackBerry, Nokia or Apple iPhone or iPad. For more information, see [Mobile Apps in SAP Business Suite](http://help.sap.com/crm) on help.sap.com/crm.

CRM Mobile Sales for Handheld (MSA for HH)

CRM handheld scenarios provide sales employees with the ability to keep track of their assignments better as well as tackle sales-related situations proficiently by using handheld devices. It allows them to work outside the office and grants them wireless access to the application either by online connection or by using synchronization when in offline mode. In addition, the users' saved data becomes available to the CRM server. The CRM handheld scenarios use the business logic of the CRM server to keep all read and written assignments and time specifications consistent with the CRM system.

The CRM handheld integration consists of the following components:

- MSA 5.0
- Prerequisite: SAP Netweaver 7.0
- Main instance: SAP NetWeaver Mobile Infrastructure (MI)

The CRM handheld scenarios support Microsoft Windows Mobile-based devices.

For more information, see SAP Service Marketplace at service.sap.com/mobile.

CRM Mobile Sales for Handheld makes use of SAP NetWeaver 7.0 Mobile Infrastructure (SAP NetWeaver MI).

The Mobile Infrastructure enables field personnel to participate in a business process in an occasionally connected mode. In this mode, a direct connection using WLAN or General Packet Radio Service (GPRS) between mobile device and back end is only established at synchronization, that is, when the MI server and MI client exchange data to keep server and client updated.

SAP NetWeaver MI consists of the following parts:

- SAP NetWeaver MI server: Requires the ABAP and Java application server to run on the same system. It serves, for example, for administration and data replication.

i Note

Although technically possible, we do not recommend combining MI with other software units (besides AS ABAP and AS Java) on one system. Instead, we recommend that you install a dedicated MI system.

- SAP NetWeaver MI client: Provides, for example, framework services, and the UI programming model.

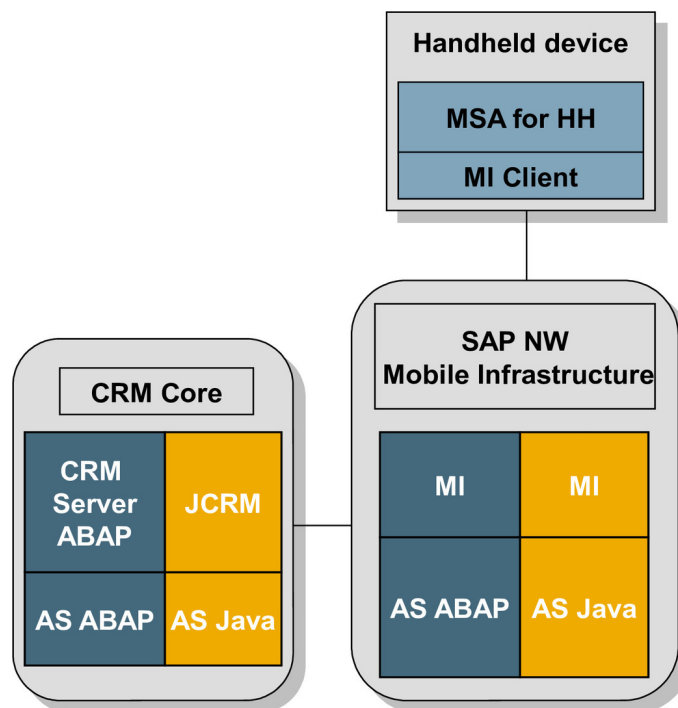


Figure 5: CRM Handheld Integration

For more information, see *Master Guide – Mobile Sales for Handheld*.

Mobile Sales Online (MSOn)

Mobile Sales Online enables users to access CRM sales data from their mobile device. It runs in a Web browser on the device and supports a variety of devices including Microsoft Windows Mobile-based devices, RIM BlackBerry, and selected Nokia devices. For more information about the supported devices, see SAP Note [882945](#). Using this application, users can perform basic administration of CRM sales data through the device browser.

Mobile Sales Online focuses on online technology where a mobile device browser is always connected to a Web server.

For more information, see SAP Developer Network at www.sdn.sap.com/irj/sdn//netweaver or SAP Service Marketplace at service.sap.com/mobile.

Mobile Sales Online consists of the following components:

- MSON 1.0
- Prerequisite: SAP Netweaver 7.0

Gateway to SAP NetWeaver Mobile

As of SAP CRM 2007 SP04 and SAP CRM 7.0 SP03, SAP has enabled the basic CRM sales processes to be consumed by mobile business processes. This is achieved through an add-on component, Gateway to SAP NetWeaver Mobile, that is deployed on SAP NetWeaver Mobile 7.1. In turn, strategic long-term partners, such as Research in Motion and Sybase, are developing client applications for the RIM BlackBerry, Microsoft Windows Mobile, and Apple iPhone platforms that consume the services provided by the gateway.

The end-to-end solutions combine the business benefits of SAP CRM with the native device experience and usability by bringing CRM sales data and processes, such as calendar and contact management, into the native applications.

The end-to-end CRM sales solutions based on the gateway add-on consist of the following components:

- SAP CRM 2007 SP06+ or SAP CRM 7.0 SP05+
- SAP NetWeaver Mobile 7.1 SP09+
- Gateway to SAP NetWeaver Mobile 1.1+
- Partner-built client application or custom application

The CRM sales functionality enabled with Gateway to SAP NetWeaver Mobile includes:

- Account and contact management
- Activity management
- Lead management
- Opportunity management
- Sales order management
- Selected analytics

EHP1 for SAP CRM 7.0 added the following functionality:

- Survey management
- Business partner factsheet
- Support for multiple transaction types

4.2.4 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](#) and [836414](#).

The component version needed is WFMCORE 2.00 SP13.

- SAP liveCache (SAP LC/LCAPPS 5.0) 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.

i Note

SAP liveCache is not identical with the liveCache that comes with SAP APO, nor can the SAP APO liveCache be used for Workforce Deployment.

EHP2 for SAP CRM 7.0 is released exclusively for SAP liveCache version 5.0.

- SAP cProject Suite (CPRXRPM 400)

The component version needed is CPRXRPM 400 SP11.

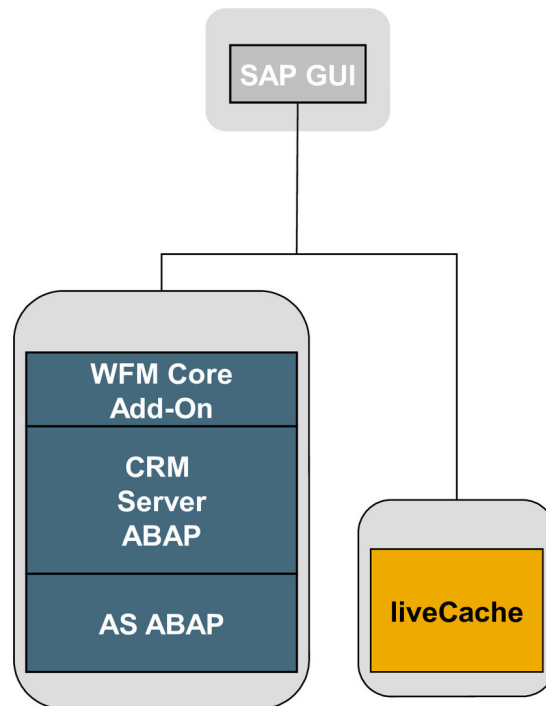


Figure 6: Workforce Deployment in CRM

4.2.5 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.

Groupware Connector

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 e-mails 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 NetWeaver 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.

cProjects for Standalone Installation

Customers who run an SAP R/3 4.6C or SAP R/3 Enterprise system and have SAP Business Suite and SAP ERP licenses are entitled to participate in the SAP ERP 6.0 ramp-up to install or upgrade to Collaboration Projects (cProjects) 4.00 on a separate server (standalone installation).

Usage of the full SAP ERP 6.0 offering is optional for cProjects customers. The technical upgrade of SAP R/3 to SAP ERP 6.0 is not mandatory for cProjects customers. cProjects 4.00 can communicate with SAP R/3 4.6C or SAP R/3 Enterprise. However, the full scope of integration is only available with SAP ERP 6.0.

cProjects is shipped to these customers together with the SAP ERP 6.0 software package. The following items are required to install or upgrade cProjects:

- SAP NetWeaver 7.0
- SAP Resource and Portfolio Management (SAP RPM) 4.0/cProjects/cFolders (contains cProjects)

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 to EHP6.

SAP Price and Margin Management by Vendavo

The SAP Price and Margin Management application by Vendavo is an SAP solution extension that you can integrate with the quotation application in SAP CRM using SAP NetWeaver Process Integration. This solution extension includes deal management capabilities that enable sales professionals to effectively negotiate

profitable deals, optimize prices in quotations to increase profit margins, and ensure compliance with pricing policies. It also provides a transparent approval workflow for sales and pricing managers, as well as for the sales professionals submitting pricing requests.

i Note

See SAP Note [1515223](#). For more information, enter the keyword *Release Notes for Usage Type PI* in the documentation of SAP NetWeaver under help.sap.com.

For more information, see SAP Service Marketplace at service.sap.com/instguides, under **SAP Solution Extensions** > **SAP Price and Margin Management by Vendavo**.

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 BW reports and xCelsius dashboards to analyze offer performance, channel performance, response profiles, and more.

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

4.2.6 Application Systems

OLTP Back-End System

SAP ERP (SAP R/3, SAP R/3 Enterprise respectively) serves as an online transaction processing system (OLTP) for CRM. It is connected to the CRM server as a back-end system and provides additional business functions such as materials management and financials.

To enable communication between both systems, the following is required:

- On the OLTP system: Installation of an R/3 plug-in that provides the integration interfaces
As of SAP ERP 6.0, the interfaces are contained directly in SAP ERP. For more information about the release strategy, see SAP Service Marketplace at service.sap.com/r3-plug-in.

- On the CRM server: Installation of the adapter framework

For more information, see SAP Help Portal at help.sap.com/crm-core > **<Choose a release>** > **Application Help** > **SAP Library** > **SAP Customer Relationship Management** > **Data Exchange and Mobile Technologies** > **CRM Integration Services** > **Adapter and Site Types** > **Adapter** > **The Adapter Framework**.

The data exchange includes an initial transfer of Customizing, master data, and transactional data to the CRM system, as well as delta 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 NetWeaver Business Warehouse

SAP NetWeaver Business Warehouse (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

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

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. For the integration of internal and cross-company processes, PI is used to incorporate all the functions of SAP NetWeaver Exchange Infrastructure (XI). 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 usage types in one system. Nevertheless, we recommend that you have a dedicated PI system.

i Note

If you are using SAP NetWeaver 7.0 including SAP Enhancement Package 3, see SAP Note [1515223](#) and [help.sap.com/nw703](#) > *What's New - Release Notes* > *Release Notes by SAP NetWeaver Systems and Standalone Engines* > *SAP Enhancement Package 3* > *Release Notes for Usage Type PI*.

4.2.7 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

For information about availability of content specifically tailored to your solution, see SAP Service Marketplace at [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 information sources for SAP Solution Manager:

- Instructions for setting up SAP Solution Manager to enable end-to-end lifecycle management tasks, see *Maintenance Planning Guide* at [service.sap.com/mopz](#) under the section *How-To's and Guides*.
- System infrastructure, scenarios, installation, and configuration of SAP Solution Manager: *Master Guide SAP Solution Manager 7.0 EHP 1* available on SAP Service Marketplace at [service.sap.com/instguides](#) > *SAP Components* > *SAP Solution Manager* > *Release 7.0 EHP 1*
- Benefits and usage scenarios: *SAP Solution Manager – Learning Maps* available on SAP Service Marketplace at [service.sap.com/rkt-solman](#) or [service.sap.com/solutionmanager](#)
- SAP Solution Manager as a tool: SAP Service Marketplace at [service.sap.com/solutionmanager](#) and *Master Guide – SAP NetWeaver 7.0* available on SAP Service Marketplace at [service.sap.com/instguidesNW70](#)

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.

4.2.8 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 ▾](#). 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.

4.2.9 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 Service Marketplace. 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 SP31 for use with SAP Solution Manager 7.0 EHP1 SP23 is part of the EHP2 for SAP CRM 7.0 ramp-up delivery.

Download: from SAP Service Marketplace at [▶ service.sap.com/swdc ▶](https://service.sap.com/swdc) [SAP Software Download Center ▶ Installations and Upgrades ▶ Browse our Download Catalog ▶ SAP Technology Components ▶ SAP Solution Manager ▶ <Release> ▶ Content ▶](#).

For more information about using SAP Solution Manager, see SAP Help Portal at [▶ help.sap.com/solutionmanager ▶](https://help.sap.com/solutionmanager).

BI Content for SAP NetWeaver 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 NetWeaver 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 Service Marketplace.

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

- **Download of BI Content:**

From SAP Service Marketplace at [▶ service.sap.com/swdc ▶](https://service.sap.com/swdc) [SAP Software Download Center ▶ Installations and Upgrades ▶ Browse our Download Catalog ▶ SAP NetWeaver and Complementary Products ▶ BI CONTENT ▶](#).

- **Download of Support Packages for BI Content:**

From SAP Service Marketplace at [▶ service.sap.com/swdc ▶](https://service.sap.com/swdc) [SAP Software Download Center ▶ Support Packages and Patches ▶ Browse our Download Catalog ▶ SAP NetWeaver and Complementary Products ▶ BI CONTENT ▶](#).

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 Service Marketplace. SAP regularly delivers updates for the master data for SLD (approximately every 4 weeks).

Download: from SAP Service Marketplace at ► service.sap.com/swdc ► [SAP Software Download Center](#) ► [Support Packages and Patches](#) ► [Browse our 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 Service Marketplace at ► service.sap.com/swdc ► [SAP Software Download Center](#) ► [Support Packages and Patches](#) ► [Browse our Download Catalog](#) ► [SAP Content](#) ► [ESR Content \(XI Content\)](#) ► [XI Content BBPCRM](#) ►.

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.

For more information, see SAP Library at ► help.sap.com/crm ► [<choose release>](#) ► [Integration & Analytics Information](#) ► [Enterprise Services Documentation](#) ►.

Download: Search for *XI Content ESM CRM* on SAP Service Marketplace at ► service.sap.com/swdc ► [Search for Software Downloads](#) ►.

4.3 System Landscapes

The following figures show examples of how typical system landscapes for test and for productive use may look. Note the following general recommendations:

- 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 a common host, ensure that the host is sufficiently sized to ensure a good performance. 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 NetWeaver Business Warehouse (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.
- SAP NetWeaver Application Server Java requires a database, but you do not have to create online backups for this database.

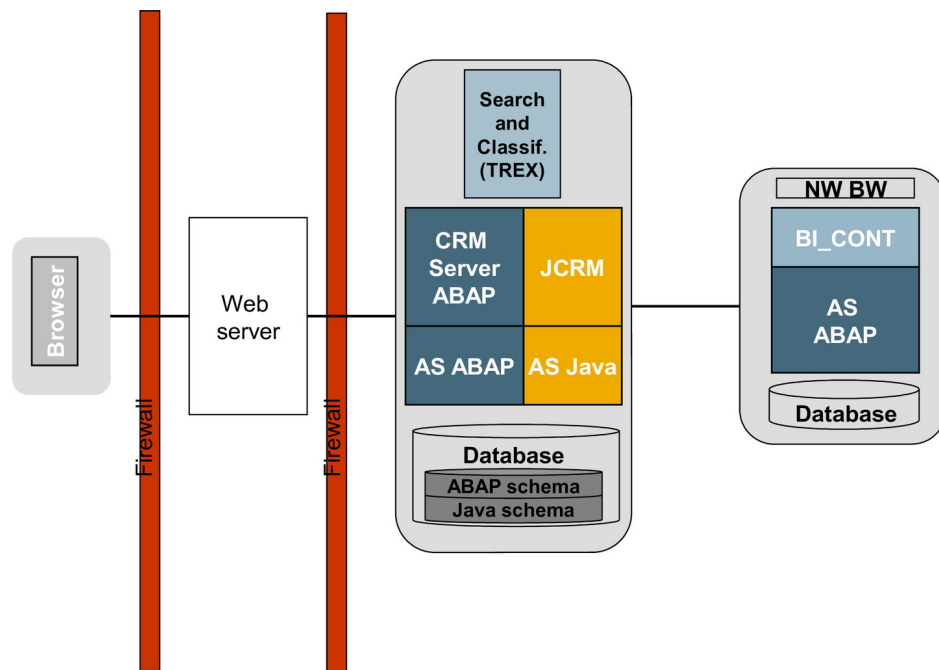


Figure 7: Example for Web Channel System Landscape

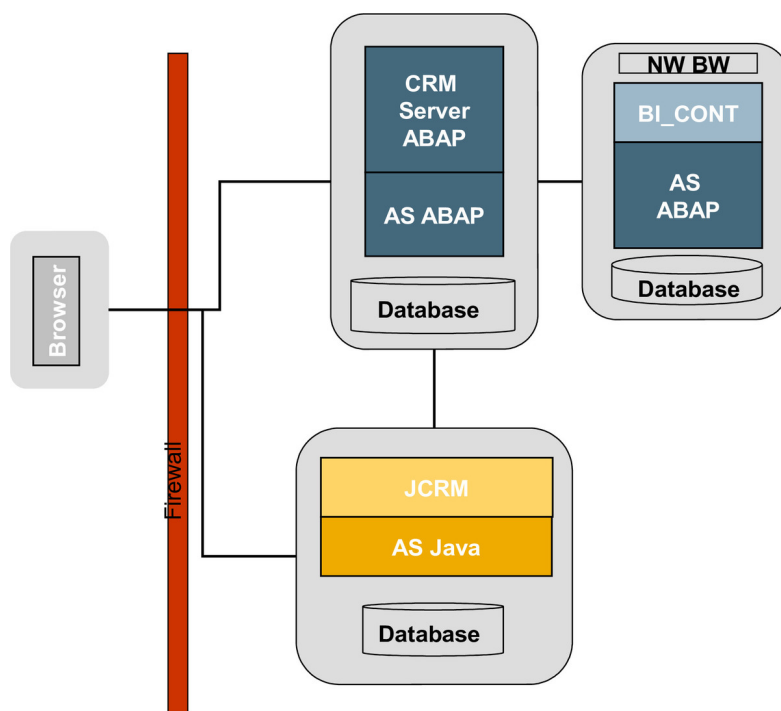


Figure 8: Example for CRM Enterprise System Landscape

i Note

When you plan your system landscape, read the information in the *Technical Infrastructure Guide for SAP NetWeaver 7.0*. This guide describes how you can distribute the SAP NetWeaver building blocks on physical hosts, to provide robustness, performance, and scalability to production systems.

For more information, see SAP Service Marketplace at service.sap.com/installNW70.

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 7.3. You can also change from your current release to SAP NetWeaver 7.3. Changing means upgrading or updating. The following approaches for system landscapes for SAP NetWeaver 7.3 are possible:

- Upgrading to SAP NetWeaver 7.3 works for hub systems.
- Embedded deployment continues to work only for SAP NetWeaver 7.0x releases and their enhancement packages (this means, for example, for SAP NetWeaver 7.00, SAP NetWeaver 7.01, and SAP NetWeaver 7.02).

For more information about the technical background, see SAP Note [1468349](#). There you can find a list of all the Java hubs that you can install on SAP NetWeaver 7.3.

i Note

If you want to install Business Suite Java applications, we strongly recommend that you use SAP NetWeaver 7.3 as the platform for your hub systems.

4.4 Overall Implementation Sequence

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

Installations with SAPinst: When you start SAPinst from the Installation Master DVD, you can choose between SAP Business Suite applications and SAP NetWeaver on the entry screen. If you choose *SAP CRM*, you can install SAP CRM software units and additional SAP NetWeaver software units.

Further references:

- **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 [1497032](#).
- **Documentation:** For documentation referenced in the following table, see [service.sap.com](#).

Procedure

Table 8

Step	Action [Corresponding Documentation]	Remarks and Subsequent Steps [Corresponding Documentation]
1	Installation of SAP Solution Manager 7.0 EHP1 SP23 and implementation content ST_ICO 150_700 SP31 <i>[Master Guide SAP Solution Manager 7.0 EHP1]</i>	None
2	Installation of Search and Classification (TREX) 7.1 Use the following parameters for the TREX installation and post-installation tasks: <ul style="list-style-type: none"> • 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 	To configure TREX, see the documentation in SAP Solution Manager at Solutions/ Applications > Basic Configuration > Configuration Structures > SAP NetWeaver 7.0 (2004s) > Standalone Engines > Search and Classification (TREX) > TREX 7.1 for SAP NetWeaver 7.0 > Post-Installation Configuration . The following scenarios use the TREX ABAP client:

Step	Action [Corresponding Documentation]	Remarks and Subsequent Steps [Corresponding Documentation]
	<p>this case you have to perform the post-installation steps to set up an HTTP connection.</p> <p>Note that some applications use both the ABAP and the JAVA client.</p> <p>For more information, see the documentation at service.sap.com/trex.</p>	<ul style="list-style-type: none"> • <i>Account and Contact Management with Channel Partners</i> • <i>Collaborative Selling</i> • <i>Quotation and Order Management for Business-on-Behalf</i> • <i>Campaign Management in CRM Web Channel</i> • <i>Catalog Management in CRM</i> • <i>Contract Management in CRM Web Channel</i> • <i>Quotation and Order Management in CRM Web Channel</i> • <i>Web Auctions: Auctioning via Web Shop</i> • <i>Complaints and Returns Management in CRM Web Channel</i> • <i>Service Request Management</i> • <i>Campaign Management</i> • <i>Quotation and Order Management in CRM</i>
3	<p>Installation of CRM Application server ABAP and CRM Application Server Java</p> <p>[<i>Installation Guide – SAP CRM 7.0 Including Enhancement Package 2 <Technology> on <Platform/OS>: <Database></i>]</p>	<p>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.</p>
4	<p>Preparation of an OLTP back-end system:</p> <ul style="list-style-type: none"> • 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. <p>See SAP Note 704564 (<i>R/3 plug-in:PI 2004.1 installation/delta upgrade</i>) and SAP Service Marketplace at service.sap.com/r3-plug-in.</p> <ul style="list-style-type: none"> • 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. <p>[<i>Installation Guide – SAP ERP 6.0 <Technology> on <Operating System>: Database</i>]</p>	None
5	<p>Setting up the CRM Mobile Client landscape:</p> <ul style="list-style-type: none"> • Installation of the Communication Station 	You can install SAP CRM Mobile Authorization Management Tool (AMT) on

Step	Action [Corresponding Documentation]	Remarks and Subsequent Steps [Corresponding Documentation]
	<p>[<i>Installation Guide – Communication Station CRM 7.0</i>]</p> <ul style="list-style-type: none"> Installation of the local Microsoft SQL server on the mobile clients <p>[Third-party documentation]</p> <ul style="list-style-type: none"> 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 <p>[<i>Installation Guide – SAP CRM Mobile Client 7.0</i>]</p> <ul style="list-style-type: none"> Installation of optional third-party software 	<p>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.</p>
6	<p>Installation of Groupware Connector 5.0</p>	<p>For more information, see the Groupware Connector <i>Administration and Installation Guides</i> on SAP Service Marketplace at ▶ service.sap.com/crm-inst > > <Choose a release> >.</p>
7	<p>Installation of Tealeaf RealTea 4.5</p> <p>You can download the Tealeaf software from SAP Service Marketplace at ▶ service.sap.com/swdc > > <i>Download > Support Packages and Patches > Search for Support Packages and Patches</i> > Enter Tealeaf and start the search. You can find the program in the result list.</p> <p>The installation documentation is part of the Tealeaf software package.</p>	<div style="background-color: #fff9c4; padding: 5px;"> <p>➔ Recommendation</p> <p>For performance reasons, install Tealeaf RealTea on a separate host.</p> </div> <p>Only required in the <i>Quotation and Order Management in CRM Web Channel</i> scenario (optional)</p>
8	<p>Installation of the highest version of SAP NetWeaver Process Integration (PI) in a dedicated system and import of XI Content.</p> <p>[<i>Installation Guide – SAP NetWeaver <version> on <Operating System>:<Database></i>]</p> <p>SAP Note 1515223 > (SAP NetWeaver Process Integration: Release Recommendation).</p> <p>SAP Note 836200 > (SAP NetWeaver 7.0: Import of Process Integration Content).</p>	<p>Only required in the <i>Quotation and Order Management in CRM Web Channel</i> scenario for <i>Sales Order Processing One-Step-Business in CRM Web Channel</i>.</p>
9	<p>Installation of SAP NetWeaver Business Warehouse (BW) 7.02 with BI Content 7.05 (or higher):</p> <ol style="list-style-type: none"> 1. Install an SAP NetWeaver system with software unit AS-ABAP, using SAPinst. 2. Configure the database of your AS-ABAP system for BW. 3. Install BI Content on the AS-ABAP system. 	<p>None</p>

Step	Action [Corresponding Documentation]	Remarks and Subsequent Steps [Corresponding Documentation]
10	Installation of SAP SCM Server 7.0 [<i>Installation Guide – SAP SCM Server</i>]	Optional
11	Installation of Frontend GUIs on every host from which you want to connect to your SAP CRM system [<i>Installation Guide – SAP Front End</i>]	None
12	Configuration of your business scenario and processes as described in SAP Solution Manager Start the configuration only after you have installed all of the required software units.	None

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 [1637366](#)
- SAP Note [1732061](#)

The following table gives you an overview of the support packages that work together with EHP2 for SAP CRM 7.0:

Table 9

Software Component	Version	Runtime	Initial Support Package
SAP NetWeaver AS ABAP	EHP3 for SAP NetWeaver 7.0	ABAP	SP01
SAP NetWeaver AS Java	EHP3 for SAP NetWeaver 7.0	Java	SP01
SAP NetWeaver AS Java NW7.3	SAP NetWeaver 7.3 — AS Java Extensions	Java	SP02
SAP AP	SAP AP 7.00	ABAP	SP24
SAP NetWeaver Search and Classification (TREX)	TREX 7.1	File system extension	N/A i Note TREX uses revisions instead of support packages. Please use the latest revision available.
Groupware Connector	Groupware Connector 5.0	File system extension	N/A
BI Content	BI_CONT 7.05 or higher	Content	SP01
RosettaNet	XI content RosettaNet 1.0	XSLT + content	SP04
CRM Software Component	None	None	None

Software Component	Version	Runtime	Initial Support Package
SAP BBPCRM	SAP CRM ABAP 7.02	ABAP	SP01
SAP CRM WEBCUIF	SAP CRM WEB UIF 7.31	ABAP	SP01
CRM Communication Station	CRM Communication Station 5.0	C/C++	SP09
CRM AMT (Authorization Management Tool)	CRM AMT 7.01	MAS	SP05
CRM MAR (Mobile Application Repository)	CRM MAR 7.01	C++	SP05
CRM MAS (Mobile Application Studio)	CRM MAS 5.0	Visual Studio	SP12
CRM Mobile Client	CRM Mobile Client 7.01	MAS	SP05
CRM IPC MOBILE	CRM IPC Mobile 7.02	Java	SP01
MSA	MSA 5.0	None	SP02
MSON	MSON 1.0	None	SP04
XI Content BBPCRM	XI Content SAP CRM ABAP 7.02	Content	SP01
BP SAP CRM	BP SAP CRM 7.0	None	SP01
ROSETTANET CRM	XI Content ROSETTANET CRM 1.0	Content	SP12
Third-Party Component	None	None	None
APACHE JAKARTA STRUTS	Apache Jakarta Struts 1.1	Open source	SP01
APACHE TOMCAT	Apache Tomcat 5.0	Open source	No SPs
INET UNA 2000	i-net UNA 2000 4.02	Third party	Licenses

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 service.sap.com/sap/support/pam.

4.5 Overall Upgrade Sequence

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 \[page 9\]](#).

To upgrade, you use these tools:

- To upgrade from SAP CRM 5.2 and SAP CRM 2007 to SAP CRM 7.0 EHP2:

- Upgrading SAP CRM Server ABAP is done using SAPUp.
- Upgrading SAP CRM Server Java from SAP CRM 5.0, 5.2, and 6.0 is done using SAP Enhancement Package Installer (SAPehpi). For more information, see the *Upgrade Guide – SAP CRM 7.0 including SAP Enhancement Package 2 Java Components – Using SAPehpi*. Upgrading lower SAP CRM Server Java releases is done using SAPJup. For more information, see the *Upgrade Guide – SAP CRM 7.0 including SAP Enhancement Package 2 Java Components – Using SAPJup*.

- To upgrade from SAP CRM 5.0 to SAP CRM 7.0 EHP2, 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 EHP2 \[page 53\]](#).

The business packages for SAP CRM 5.0 cannot be used in SAP CRM 7.0 EHP2 because they only run on the PC UI.

i Note

For upgrading from SAP CRM 4.0 to EHP1 for SAP CRM 7.0 an one-step upgrade is possible. An automatic UI migration of customer-specific UIs (including the underlying UI-related coding) is not possible. For more information, see the Customer Relationship Management *Upgrade and Update Guide* under service.sap.com/instguides.

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 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 [1497032](#).

Procedure

Table 10

Step	Action [Required Documentation]	Remark / Subsequent Step
1	Installation of SAP Solution Manager 7.0 EHP1 SP23 and ST-ICO 150_700 SP31 or upgrade to this version [Master Guide SAP Solution Manager 7.0 EHP1] [Upgrade Guide – SAP Solution Manager 7.0 incl. Enhancement Package 1 <OS / DB>]	/
2	Upgrade of Frontend GUIs [Installation Guide – SAP Front End]	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 .


Step	Action [Required Documentation]	Remark / Subsequent Step
3	Upgrade of CRM Application Server ABAP and CRM Application Server Java [Upgrade Guide – SAP CRM 7.0 Including Enhancement Package 2 <Technology> on <Platform/OS>: <Database>]	/
4	Upgrade of SAP NetWeaver Search and Classification (TREX) to version 7.1 [Upgrade - TREX 6.1 to TREX 7.0] [Upgrade - TREX 7.0 to TREX 7.1]	/
5	Installation of SAP NetWeaver liveCache 5.0 [Installation Guide – SAP NetWeaver liveCache]	/
6	Update of Groupware Connector to version 5.0	/
7	Deinstallation of the old Tealeaf release and installation of Tealeaf RealTime 4.5 You can download the Tealeaf software from SAP Service Marketplace at ► service.sap.com/swdc ➤ > Download > Support Packages and Patches > Search for Support Packages and Patches ➤. Enter Tealeaf and start the search. You can find the program in the results list. The installation documentation is part of the Tealeaf software package.	/
8	Upgrade of SAP NetWeaver BW to version 7.02 [Upgrade Guide – SAP NetWeaver 7.0 Business Intelligence]	/
9	Upgrade of SAP SCM Server to version 7.0 For more upgrade and update information, see the guides for SAP SCM on SAP Service Marketplace at ► 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 [1637366](#) ➤
- SAP Note [1732061](#) ➤

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 service.sap.com/sap/support/pam .

5 Migration from SAP CRM 5.0 to SAP CRM 7.0 EHP2

This documentation describes the functional migration from SAP CRM 5.0 to SAP CRM 7.0 EHP2, taking the new user interface WebClient UI into account.

i Note

In SAP CRM 7.0 EHP2, SAP GUI is only supported for administrative tasks. The People-Centric UI (PC UI) is no longer supported. For more information, see SAP Note [1118231](#).

- If you upgrade from SAP CRM 5.0 to SAP CRM 7.0 EHP2, 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 SAP CRM 7.0 EHP2, 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 SAP CRM 7.0 EHP2 compared with SAP CRM 5.0.

i Note

This section does not provide a complete inventory of functional changes between SAP CRM 5.0 and SAP CRM 7.0 EHP2. 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 [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 CRM 7.0 EHP2 listed in this section.

What Are the Main Upgrade Activities?

The upgrade to SAP CRM 7.0 EHP2 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 SAP CRM 7.0 EHP2 compared with SAP CRM 5.0
- Functional restrictions in SAP CRM 7.0 EHP2 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 SAP CRM 7.0 EHP2, see SAP Note [1600364](#).

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*.



5.1 Master Data

5.1.1 Accounts and Contacts

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 11

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0 EHP2
Accounts	Not available	<p>Introduction of a life cycle stage for the account; the fields on the user interface depend on the user's selection.</p> <div data-bbox="783 1435 1359 1624"><p> Example</p><p>If you select <i>Prospect</i>, you see different fields and assignment blocks to those you see if you select <i>Customer</i>.</p></div>
Field-like and table-like enhancements are generated with Easy Enhancement Workbench (EEW).	SAP GUI, PC UI	<p>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.</p> <div data-bbox="783 1823 1359 1960"><p> Note</p><p>Do not click the <i>Generate</i> button instead since this will produce syntax errors in generated coding.</p></div>

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0 EHP2
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.

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 12

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0 EHP2
Field-like and table-like enhancements are generated with Easy Enhancement Workbench (EEW).	SAP GUI, PC UI	Business data toolset (BDT) not supported (not reusable) in SAP CRM 7.0 EHP2; therefore, field and screen modification has changed.
Postal validation	SAP GUI, PC UI	If a customer uses third-party software for postal validation, the implementation of interfaces for postal validation pop-ups is necessary.

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 (BAIs) for the WebClient UI. You find these BAIs 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 SAP CRM 7.0 EHP2:

Table 13

Note Number	Short Description
999092 	Field and screen modification
1017763 	Pop-ups for postal validation

5.1.2 Products, Product Hierarchies, Objects, Partner/Product Ranges




Enhancements

The following table shows functional enhancements in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:


Table 14

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0 EHP2
Maintenance transaction	SAP GUI	As in PC UI, maintenance is split for the different types of products: <ul style="list-style-type: none"> • Products (common search for product type material and service, but maintenance of material only) • Service • Warranty • Competitor products • Objects

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 Customer Relationship Management at **► Master Data ► Products ► Concepts ► Set Types and Attributes ► Definition of Set Types and Attributes/Creating UI Configuration for Set Types** .

Restrictions

The following tables show functional restrictions in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 15: Restrictions for Products

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0 EHP2
Concept of inactive products	SAP GUI	No longer supported To block a product for business transactions, you need to set the status to <i>locked</i> ; inactive products need to be set

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0 EHP2
		to <i>active</i> in SAP GUI, before they can be changed in the WebClient UI.
Display of related business documents (BDocs)	SAP GUI	No longer supported
Recategorization of products	SAP GUI	Only available in SAP GUI
Display data for date/time in the past (this does not refer to change documents)	SAP GUI	No longer supported The change history allows a detailed view of the changes.
UI generation of relationships between products and business partner/product	SAP GUI	BOL entries are generated for the WebClient UI; the user interface is not generated.

Table 16: Restrictions for Product Hierarchies

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0 EHP2
Definition of default values and value restrictions with regard to the maintenance of product categories	SAP GUI	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.

Table 17: Restrictions for Partner/Product Ranges

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0 EHP2
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	SAP GUI	Only generic PPR maintenance can be used.

Migration Activities


Object Fact Sheet


The environment for Customizing and configuration of a fact sheet is provided in SAP CRM 7.0 EHP2. 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 SAP CRM 7.0 EHP2:

Table 18

Note Number	Short Description
1026475 	UI layout <ul style="list-style-type: none"> In SAP CRM 7.0 EHP2, only those relationships that are explicitly assigned to the categories are visible in the UI. In SAP GUI, combined screens exist.

Note Number	Short Description
	<div style="background-color: #fff9c4; padding: 10px;">  Example You access product HT-001. In the Accessories screen, a subscreen is included that shows the accessories of HT-001. A second subscreen is included that shows the products to which HT-001 is an accessory. In SAP CRM 7.0 EHP2, such screens are displayed as two separate assignment blocks, which have to be assigned explicitly to the categories. </div> <ul style="list-style-type: none"> • Since the WebClient UI does not support tab pages, the assignment of views and positions is no longer evaluated.

5.1.3 Installed Bases

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 19

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0 EHP2
Display of detail data for the products	SAP GUI, PC UI	You can navigate via hyperlink to the complete data.
Maintenance of specific data for the (individual) object	SAP GUI, PC UI	You can navigate via hyperlink to the complete data.
No display of installed bases at a specific point in time	SAP GUI	Not available
Structure of an installed base – assigned as component – not visible in the installed base in focus	SAP GUI	You can navigate via hyperlink to the complete data.
Parallel display of two installed bases, one beside the other, and moving objects between both (transaction IB54)	SAP GUI	Not available
Fact sheet	PC UI	The reporting is performed in different assignment blocks in the application.
Attachments	SAP GUI, PC UI	The following functions are not supported: <ul style="list-style-type: none"> • Document tree structure • Document versioning • Where-used list

5.2 Sales

5.2.1 Sales Order Management, CRM Billing

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 20

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0 EHP2
Price change approval workflow	Not available	New function
Credit analyst workbench	Not available	New function
Package quotation	Not available	New function

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 21

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0 EHP2
Inquiry processing	SAP GUI	Not available
Partial transaction processing (sales order, sales quotation, and sales contract)	SAP GUI	Not available
Combination of quotation and order items in one document	SAP GUI	Not available
Incentive and commission management	SAP GUI, PC UI	Not available
Reference objects on sales order item level	SAP GUI	Not available in WebClient UI
Partners on sales order item level	SAP GUI	Ship-to party, payer, and bill-to party are available in the business context (assignment blocks <i>Shipping</i> and <i>Billing</i>); no separate assignment block for <i>Parties Involved</i> .
Account fact sheet (AFS)	SAP GUI	Not available in WebClient UI
Commodity pricing	SAP GUI, PC UI	Not available

5.2.2 Opportunities, Listings, Territory Management, Organizational Management

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 22

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0 EHP2
Opportunities	SAP GUI, PC UI	<p>The following functions are not supported:</p> <ul style="list-style-type: none"> • The hierarchy on item-header level; only the hierarchy on header-header level is supported, which is visualized as a simple list. • Competitor products • Document flow on item level • Project integration with Product Lifecycle Management (PLM) in Collaboration Projects (cProjects)
Listings	SAP GUI, PC UI	<ul style="list-style-type: none"> • Listing maintenance: Personalization of dynamic fields is not supported. • Listing reports: The function <i>Save Search As</i> is not supported.
Territory management	SAP GUI	<ul style="list-style-type: none"> • It is not possible to assign employees to a territory when you use the input help of the <i>Employee</i> field; this is now possible with the input help of the <i>Position</i> field. • The number of objects for a territory is not displayed.
Organizational management	SAP GUI	<ul style="list-style-type: none"> • 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, the system may dump. For more information, see SAP Note 1635858.

5.2.3 Account Planning

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 23

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0 EHP2
Customizing	Not available	Action profile is assigned as default value in Customizing.

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0 EHP2
Customizing	Not available	Business Warehouse (BW) analysis can be viewed within an account plan.
Change history	Not available	Change history function is available for account plan.
Status <i>Rejected</i>	Not available	New system status <i>Rejected</i> is available; it locks the account plan and deletes the associated condition records.
Flex front end	Not available	All integrated planning applications have a flex front end in SAP CRM 7.0 EHP2; this change is performed in the Planning Services infrastructure. However, the flex UI is only available with SAP NetWeaver Business Warehouse (BW) 7.0. SAP CRM 7.0 EHP2 and the BI 3.5 UI are automatically switched to the current HTML control. For more information, see SAP Note 1072595 .

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 24

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0 EHP2
BAdI CRM_ACC_PL, method AUTHORITY CHECK	PC UI	The method AUTHORITY_CHECK is no longer called for the result list. There is no workaround possible at the moment; instead, use Easy Enhancement Workbench (EEW).
BAdI CRM_ACC_PL	SAP GUI, PC UI	New BAdI methods CHECK_BEFORE_SAVE and GET_DROPDOWNBOX_VALUE
Customizing	SAP GUI, PC UI	The delivery Customizing for planning profile groups has been changed: <i>Plan Basis</i> is no longer used; it has been replaced by <i>Product Planning Basis</i> .
Partner/product range (PPR) check on person responsible	SAP GUI, PC UI	The PPR check is only performed on the planning account and product/product category; it is no longer performed on the person responsible.

5.2.4 Mobile Sales

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 25

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0 EHP2
Quotation and order management	Mobile client	Additional Customizing is necessary.

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0 EHP2
Quotation and order management: rough stock information	Mobile client	Additional Customizing is necessary.
Quotation and order management: sales-area dependent transaction types	Mobile client	Additional Customizing is necessary.
Quotation and order management: cockpit	Mobile client	Additional Customizing is necessary.

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 26

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0 EHP2
Account planning	Mobile client	The account planning data persists only in SAP NetWeaver Business Warehouse (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 accessible via reporting.

5.3 Service

Enhancements

The following table shows functional enhancements in all service transactions in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 27

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0 EHP2
Role concept	SAP GUI, PC UI	The <i>Service Professional</i> role combines the functions of the former <i>Service Manager</i> and <i>Service Representative</i> roles.
Multilevel categorization	SAP GUI, PC UI	Used in all service transactions
Screen sequence control	SAP GUI	Screen sequence control is no longer supported; new unified way to customize the WebClient UI.

Restrictions

There are no functional restrictions in the service transactions in SAP CRM 7.0 EHP2 compared with 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 SAP CRM 7.0 EHP2, the use of subject codes is no longer supported. Instead, you need to 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

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 SAP CRM 7.0 EHP2, 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.

5.3.1 Complaints and Returns, In-House Repair Orders

Enhancements

The following table shows functional enhancements as of the current enhancement package of SAP CRM 7.0 compared with SAP CRM 5.0:

Table 28

Function in SAP CRM 5.0	5.0 UI	Enhancement as of Current Enhancement Package of SAP CRM 7.0
Search for complaints, returns, and in-house repairs	SAP GUI, PC UI	User-defined search variants are now available.
Maintenance transaction	SAP GUI, PC UI	The three types are now divided into three applications that provide optimized UI configuration: complaints, returns, and in-house repairs.
Advanced search for reference documents	SAP GUI	The search for reference documents covers both internal and external document types.
Advanced Returns Management	Not available	Return process integration related to ERP Advanced Returns process (business function CRM_COMPL_ARM_1)

5.3.2 Service Orders, Service Contracts, Warranty Claim Processing

Restrictions

The following tables show functional restrictions in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 29: Restrictions for Service Orders, Service Contracts, and Warranty Claim Processing

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0 EHP2
Item hierarchy tree	SAP GUI, PC UI	Not supported
Service monitor	SAP GUI	Only supported in SAP GUI
Action monitor	SAP GUI	Only supported in SAP GUI
Subject codes	SAP GUI, PC UI	Not supported; subject code catalogs have been replaced by the category modeler.

Table 30: Restrictions for Service Orders and Service Contracts

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0 EHP2
Service order quotations	SAP GUI, PC UI	Converting service order quotations to service orders by using statuses is not supported; to create a service order from a service order quotation, a follow-up transaction needs to be created.

Table 31: Restrictions for Service Contracts

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0 EHP2
Service level agreement (SLA) profile administration	SAP GUI, PC UI	The administration transaction (CRMD_SERV_SLA) <i>Maintain Availability and Response Times</i> remains in SAP GUI.

5.3.3 Case Management

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 32

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0 EHP2
Case closing	SAP GUI, PC UI	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.

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 33

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0 EHP2
Action monitor	SAP GUI	Only supported in SAP GUI

5.3.4 Mobile Service

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 34

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0 EHP2
Assignments	Mobile client	Available on the mobile client, but not supported in SAP CRM 7.0 EHP2 online
Multilevel categorization	Mobile client	Used in all service transactions in SAP CRM 7.0 EHP2 online; the former use of subject codes is still supported only on the mobile client.

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 \[page 62\]](#).

5.4 Marketing

5.4.1 Marketing Plans and Campaigns

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 35

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0 EHP2
Customizing	Not available	Status profile, action profile, and communication medium are assigned as default values in Customizing.
Campaign execution	Not available	All assigned segments are transferred to channel (for example, e-mail) when you click <i>Start</i> .
Enhancement spot CRM_MKTPL with several BAdIs	Not available	Based on the introduction of a new object layer architecture, new BAdIs have been introduced: <ul style="list-style-type: none"> • The BAdIs CRM_MKTPL_OL_APP and BCRM_MKTPL_OL_OBJ replace BAdI CRM_MKTPL. • The new BAdI CRM_MKTPL_OL_ASG allows you to build enhancements for assignments. • The new BAdI CRM_MKTPL_SEARCH allows you to build enhancements for the search.

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 36

Function in SAP 5.0	5.0 UI	Restriction in SAP CRM 7.0 EHP2
BAdI CRM_MKTPL	SAP GUI, PC UI	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.
BAdI CRM_MKTPL, method AUTHORITY_CHECK	PC UI	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.
BAdI CRM_MKTPL_KPI_BADI	SAP GUI, PC UI	Since the key figure planning integration has been redesigned, the BAdI CRM_MKTPL_KPI_BADI is not

Function in SAP 5.0	5.0 UI	Restriction in SAP CRM 7.0 EHP2
		called anymore; it has been replaced by BAdIs CRM_KFP_BADI and CRM_KFP_COMP_BADI.
Business Warehouse (BW) reports	SAP GUI, PC UI	BW reports assigned to planning profile groups are not evaluated anymore for marketing plans and campaigns.
Customizing	SAP GUI	The Customizing settings for column number, column width, and text width for distributions are not evaluated anymore.
ERP integration	SAP GUI, PC UI	The ERP integration type <i>Online</i> is not available anymore. Only the ERP integration via middleware is supported.
Customizing	SAP GUI, PC UI	The standard Customizing for planning profile groups has changed: <ul style="list-style-type: none"> • 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.

5.4.2 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](#).

5.4.3 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](#).

5.4.4 Mail Forms

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 37

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0 EHP2
Letter as direct channel	SAP GUI	Letter is no longer supported as a direct channel; sending letters should be performed via export channel.
PDF format	SAP GUI	PDF format is no longer supported.
Mail templates	SAP GUI	Mail templates are no longer supported.
Address administration	SAP GUI, PC UI	Automatic address administration via address node is no longer supported.

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.

5.4.5 Trade Promotion Management

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 38

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0 EHP2
Customizing	SAP GUI	Status profile and action profile are assigned as default values in Customizing.

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0 EHP2
Customizing	SAP GUI	Customizing for <i>Define Parameters for BI Analysis</i> was adapted for the WebClient UI.
Product hierarchy promotion	Not available	Promotions can be planned for product category, product group, or product segment without the need to explode to the product level.

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 39

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0 EHP2
BAdI CRM_MKTPL	SAP GUI, PC UI	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.
BAdI CRM_MKTPL, method AUTHORITY_CHECK	PC UI	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.
BAdI CRM_MKTPL_KPI_BADI	SAP GUI, PC UI	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.
ERP integration	SAP GUI, PC UI	ERP integration type <i>Online</i> is not available anymore. Only ERP integration via middleware is supported.
Customizing	SAP GUI, PC UI	Delivery Customizing for planning profile groups has been changed; the new key performance indicator (KPI) has been removed.
Key figure planning	SAP GUI, PC UI	Old-style key figure planning in SAP List Viewer (ALV) is no longer supported.
Budgeting	SAP GUI	Top-down budgeting in Microsoft Excel is no longer supported.
Success key measure planning	SAP GUI, PC UI	Success key measure planning is no longer supported.
Hierarchy	SAP GUI, PC UI	Creation of trade promotions or trade promotion elements below trade promotion elements is no longer possible.

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0 EHP2
		An existing marketing project cannot be assigned to another marketing project (only to a link in the parent field, but there is no <i>Add</i> button in the hierarchy).
Segment partner function	SAP GUI, PC UI	The segment partner function is no longer available.
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.
Copy function	SAP GUI, PC UI	The advanced copy function has been enhanced compared to SAP CRM 5.0.
Mass change	PC UI	Mass change options have been enhanced compared to SAP CRM 5.0.
Trade promotion execution	SAP GUI, PC UI	The execution function is limited to the activity.
Customer defaults	PC UI	The promotional calendar is no longer supported.

5.5 Interaction Center

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 40

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0 EHP2
Standard responses	SAP GUI	<ul style="list-style-type: none"> New standard response editing page in the <i>IC Manager</i> role Insert agent signatures using attributes in mail form tool
Alerts	SAP GUI	<ul style="list-style-type: none"> New alert editing tool in the <i>IC Manager</i> role (WebClient UI) instead of in the Customizing activity Alerts are now part of the new intent-driven interaction guidance.
Rule modeler	PC UI	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Intent-driven interaction guidance Interaction modeling and evaluation

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0 EHP2
<p>i Note The IDI is available as of SAP CRM 5.1.</p>		
Account identification	IC WebClient UI	<ul style="list-style-type: none"> Address validation and duplicate check <i>Do not contact</i> indicator available in <i>More Fields</i> 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.
Product	IC WebClient UI	<ul style="list-style-type: none"> Product registration allows the integration of objects. Product search and result list enhanced Product search based on product catalog
Multichannel communication	IC WebClient UI	<ul style="list-style-type: none"> 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 BAAdI for IC ERP sales order.
Service order/service ticket/lead	IC WebClient UI	<ul style="list-style-type: none"> 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 shows functional restrictions in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 41

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0 EHP2
Scratch pad	IC WebClient UI	Scratch pad needs to be closed before importing content.
Alerts	IC WebClient UI	No default alerts are provided.
Launch transaction	PC UI	PC UI-based launch transaction is no longer supported.
Service ticket	IC WebClient UI	There is a service message view that has not yet been implemented.

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 SAP CRM 7.0 EHP2.

Custom Views and Controllers

Custom views and controllers from SAP CRM 5.0 do not work with the SAP CRM 7.0 EHP2 framework. 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 SAP CRM 7.0 EHP2.

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.

5.6 CRM Web Channel

The naming of the key capability CRM E-Commerce was changed to CRM Web Channel. For more information about the new naming, see SAP Note [817119](#).

In CRM Web Channel, many applications are Java-based (JSP UI) with the exception of Web catalog management, which was converted to the CRM WebClient UI.

i Note

CRM Web Channel and SAP Web Channel Experience Management are different solutions. SAP Web Channel Experience Management is a newer solution for creating Web shops that can use SAP CRM as back end. SAP Web Channel Experience Management is available as of SAP enhancement package 1 for SAP CRM 7.0, but is not part of the standard delivery for SAP CRM. For more information about SAP Web Channel Experience Management, see SAP Library for SAP Web Channel Experience Management on SAP Help Portal at help.sap.com/wec. Choose a release and then *Application Help*.

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 42

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0 EHP2
Web catalog management	JSP UI	<ul style="list-style-type: none">The <i>Web Channel Manager</i> role contains the work center <i>Catalog Management</i>.Catalog staging via the work center <i>Catalog Management</i> in the <i>Web Channel Manager</i> roleUse of the SAP TREX API programming interface instead of SRET API
Roles with administrative and business functions related to CRM Web Channel	SAP GUI	<i>Web Channel Manager</i> role
Business scenario: <i>Contract Management</i>	SAP GUI	The following user status profiles for the contract negotiation process are delivered: <ul style="list-style-type: none">CRMECOCN: User status profile for the contract headerCRMECN_I: User status profile for the contract items
Business scenario: <i>Quotation and Order Management in CRM Web Channel</i>	JSP UI	New business process <i>Sales Order Processing B2C for Service Providers in CRM Web Channel</i> . This process covers:

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0 EHP2
		<ul style="list-style-type: none"> Selling packages, rate plans, incentives, and enabling products Collecting technical data Automatic contract creation for rate plan items
Business process: <i>Sales Order Processing B2B in CRM Web Channel</i>	JSP UI	<ul style="list-style-type: none"> Dynamic field control for orders Search for items in orders, quotations, and order templates
Business process: <i>Sales Order Processing B2C in CRM Web Channel</i>	JSP UI	<ul style="list-style-type: none"> Enhancements of the B2C Web shop UI: Catalog navigation, Web shop header, mini shopping basket, shopping basket, scale price display Verification word for integration with Interaction Center
Business process: <i>Browsing for and Selecting Products in B2C CRM Web Channel</i>	JSP UI	<ul style="list-style-type: none"> Additional way to display products in product catalog via block view Paging through list of (special and personalized) offers on Web shop home page Display of number of pages in catalog area browsing
Business process: <i>Browsing for and Selecting Products in B2C CRM Web Channel – Configurable Material in Product Catalog</i>	JSP UI	Inline configuration display in block view of product display in product catalog
Business process: <i>Sales Order Processing B2C in CRM Web Channel</i>	JSP UI	<ul style="list-style-type: none"> Interaction Center mode New text types <i>Eye-catcher text</i> and <i>Price eye-catcher text</i> for display in product catalog and in product details (only <i>Price eye-catcher text</i>)
Business process: <i>Sales Order Processing B2C in CRM Web Channel – Special Prices</i>	JSP UI	Strike-through prices in product catalog display (available for IPC prices and list prices)
Business scenario: <i>Catalog Management</i>	JSP UI	Usage of packages and products with dependent components in catalog management
Business scenario: <i>Quotation and Order Management with CRM Web Channel</i>	JSP UI	New business process <i>Sales Order Processing B2B with ERP Order in CRM Web Channel</i>
Business scenario: <i>Quotation and Order Management with CRM Web Channel</i>	JSP UI	New business process <i>Loyalty Management with CRM Web Channel</i>
Catalog management in CRM	N/A	<ul style="list-style-type: none"> Enterprise Service bundle <i>Product Catalog Processing with CRM</i> Web services for the runtime product catalog

Restrictions

The following table shows functional restrictions in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 43

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0 EHP2
Catalog management in CRM	JSP UI	<ul style="list-style-type: none"> The Web catalog management application has been replaced by the <i>Catalog Management</i> work center that is available with the <i>Web Channel Manager</i> role in SAP CRM. The SAP TREX API programming interface replaces the SRET API interface that was used in SAP CRM 5.0.
Catalog XML export: download option to save to local drive	SAP GUI	The catalog XML export download option to save to local drive saves to the application server drive only.
Contract negotiation: status change for all/selected items from the contract inquiry on header level	SAP GUI	Contract negotiation is no longer delivered. For more information, see SAP Note 1457223 .
CRM business package for SAP NetWeaver Portal	Portal	<p>The <i>Change Password</i> iView is no longer available in the <i>Customer</i> portal role; the password can now be changed via personalization in SAP NetWeaver Portal.</p> <p>The iViews for Internet telephony (IT) and callback are not available in the <i>Customer</i> portal role in SAP CRM 7.0 EHP2.</p>
Business process: <i>Live Web Collaboration</i>	JSP UI	The following features are not available anymore, because the IC WinClient is no longer supported: Multi-chat, Internet telephony, telephone callback.

Migration Activities

Sales Order Processing B2C in CRM Web Channel: Special Prices

When you want to use existing Web shops, make sure that in the shop definition in the Web shop management, a value is entered for the *Controlling Price Determination in the Catalog* parameter. Additionally, if Internet Pricing and Configurator (IPC) prices are used, a pricing procedure similar to the standard example pricing procedure OISTO2 needs to be set up and used in the Web shop.

If list prices are used in the Web shop in the catalog variant, a condition needs to be maintained for special prices.

Catalog Management in CRM

- Replacement of the Web catalog management
 - Assign the authorization role (PFCG role) to the *Web Channel Manager* business role in transaction SU01.
 - Assign the *Web Channel Manager* business role to the business users who need access to the *Catalog Management* work center in the CRM WebClient UI.
- Replacement of the programming interface SRET API with SAP TREX API

You need to make the necessary settings in Customizing for *Customer Relationship Management* under **► Master Data ► Product Catalog ► Define Catalog Variant Indexing**.
- Catalog indexing (formerly known as catalog replication from SAP CRM to SAP TREX)

If you want to continue to use the catalog indexing method used in SAP CRM 5.0, choose *No Staging: Overwrite Index Immediately (SAP TREX-API)* in the Customizing activity *Define Catalog Variant Indexing* under **► Customer Relationship Management ► Master Data ► Product Catalog**. If you want to ensure that

your Web shop is always available, choose *No Staging: Overwrite Index After Indexing (SAP TREX-API)*. If you want to use the catalog staging additionally, choose *Staging (SAP TREX-API)*.

Catalog XML Export: Download Option to Save to Local Drive

Existing export profiles need to be adapted to the application server files.

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 SAP CRM 7.0 EHP2:

Table 44

Note Number	Short Description
980915 	XML Export
988965 	Proxy Error Message

5.7 Partner Channel Management

Enhancements

The following table shows functional enhancements in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 45

Function in SAP CRM 5.0	5.0 UI	Enhancement in SAP CRM 7.0 EHP2
Activity management	Not available	New transaction types for interaction logs
Partner management	Not available	New workflow to delete users
Partner management	Not available	New role PRCONT – <i>Partner Contact</i>
Partner management	Not available	Business partner role <i>Channel Partner</i> is automatically assigned during creation.
Account management	Not available	New partner-specific UI for the maintenance of account contacts
Further partner UIs	Not available	New UI configurations for the display of products and internal employees of partners
Market development funds	Not available	The Partner Channel Management solution now supports the process of market development funds. The roles for <i>Channel Manager</i> and <i>Partner Manager</i> have been extended by several applications.
Rule-based employee assignment to channel partners	Not available	Partner management now contains a button to assign a channel manager to a channel partner based on certain rules.
User assignment to company contacts in the <i>Channel Partner</i> role	Not available	The <i>Company Contacts</i> application has been extended in such a way that information can be maintained.

New Authorization Object to Control Business Partner Roles

In SAP CRM 7.0 EHP2, 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 shows functional restrictions in SAP CRM 7.0 EHP2 compared with SAP CRM 5.0:

Table 46

Function in SAP CRM 5.0	5.0 UI	Restriction in SAP CRM 7.0 EHP2
<i>Partner Employee</i> role	PC UI	The <i>Partner Employee</i> role is not available; the <i>My Profile</i> application is not available in the WebClient UI.

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 SAP CRM 7.0 EHP2, 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.

i 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.

i 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 SAP CRM 7.0

EHP2, 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 SAP CRM 7.0 EHP2:

Table 47

Note Number	Short Description
1138855 	Partner Channel Management Authorization Roles
1111654 	Partner Channel Management Upgrade from CRM 5.0
1119251 	Partner Channel Management Upgrade: New BP role PRCONT
1119661 	Partner Channel Management Upgrade: Regenerate PDF

5.8 Cross-Application Components

5.8.1 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.

For more information about fact sheets, see SAP Library for SAP CRM on SAP Help Portal at help.sap.com/crm-core. Choose a release and then *Application Help*. In SAP Library, choose ► *WebClient UI Framework* ► *Fact Sheet* ►.

5.8.2 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 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* ►.

5.8.3 MS Office Integration

If you have created your own templates in SAP CRM 5.0, you can adapt these templates in SAP CRM 7.0 EHP2 with little effort. 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 SAP CRM 7.0 EHP2, you need Microsoft Office Professional 2003, Microsoft Office Professional 2003 Enterprise, or Microsoft Word 2003 core program, or higher versions.

For more information about the MS Office Integration, see SAP Library for Customer Relationship Management at ► *Basic Functions* ► *Template Designer* ►.

5.8.4 Web Services

The existing Web services in SAP CRM 5.0 can also be used in SAP CRM 7.0 EHP2. If you want to create new Web services in SAP CRM 7.0 EHP2, you can access the Web services tool from the *Service Professional* (SERVICEPRO) business role in the work center *Service Operations*.

For more information about the Web services tool, see SAP Library for Customer Relationship Management at ► *Basic Functions* ► *Web Services* ►.

5.8.5 Portal Integration

With SAP CRM 7.0 EHP2, the WebClient UI has been integrated into SAP NetWeaver Portal. You can run SAP CRM 7.0 EHP2 with all features in the portal. Every CRM application is displayed in one portal page. In comparison to prior releases, you can now easily create portal content by using the role upload tool.

Note

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 SAP CRM 7.0 EHP2 or upgrade to this release.
2. Adapt your CRM business roles in SAP CRM 7.0 EHP2 and perform the necessary customizing.
3. Check your business roles in SAP CRM 7.0 EHP2 standalone.
4. Install SAP NetWeaver Portal 7.0 (2004s) or upgrade to this release, and connect SAP CRM 7.0 EHP2 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 SAP CRM 7.0 EHP2, see the following:

- Customizing for Customer Relationship Management under [UI Framework > Portal Integration > Overview](#)
- SAP Library for Customer Relationship Management at [WebClient UI Framework > Portal Integration](#)

Caution

In SAP CRM 7.0 EHP2, the People-Centric UI (PC UI) is no longer supported. If you want to upgrade portal roles supported in SAP CRM 5.0 to SAP CRM 7.0 EHP2, follow the steps mentioned above. As a result, new portal roles are created. The previous portal roles are no longer supported.

5.8.6 Workflow Inbox

Up to the current enhancement package of SAP CRM 7.0, the workflow inbox of the Business Workplace (transaction SBWP in SAP GUI) is not available in the WebClient UI. Instead, you can use the workflow inbox of the SAP CRM worklist.

Enhancements

The following table shows functional enhancements up to the current enhancement package of SAP CRM 7.0 compared with SAP CRM 5.0:

Table 48

Function in SAP CRM 5.0	5.0 UI	Enhancement Up to the Current Enhancement Package of SAP CRM 7.0
Workflow inbox of Business Workplace	SAP GUI	<p>Workflow inbox of the SAP CRM worklist:</p> <p>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 Customer Relationship Management under ▶ Basic Functions ▶ Worklist ▶ Define Alert Inbox and Workflow Inbox ▶ Integrate Other SAP Systems in Workflow Inbox ▶ and BAdI: Integrate Other SAP Systems in Workflow Inbox.</p>

Restrictions

The following table shows functional restrictions up to the current enhancement package of SAP CRM 7.0 compared with SAP CRM 5.0:

Table 49

Function in SAP CRM 5.0	5.0 UI	Restriction Up to the Current Enhancement Package of SAP CRM 7.0
Workflow inbox of Business Workplace	SAP GUI	<p>Workflow inbox of the SAP CRM worklist:</p> <ul style="list-style-type: none"> • “Advance with dialog”: not supported • Secondary methods (tab page Methods of an Activity): not supported • Methods before work item execution: not supported • Methods after work item execution: not supported • Condition “complete execution”: not supported • Program exits: not supported • Display of work items: implemented differently from SAP GUI (different functions offered, functions offered differently) • Step type “form”: not supported • Step type “user decision”: supported using DDLB instead of buttons • Step type “document from template”: not supported • Step type “ad hoc anchor”: not supported • Reviewer workflow, graphical workflow log: not supported

Advanced Workflow Inbox

In the current enhancement package of SAP CRM 7.0, 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 the current enhancement package of SAP CRM 7.0, 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 50

Function in SAP CRM 5.0	5.0 UI	Enhancement Up to the Current Enhancement Package of SAP CRM 7.0
View tasks of workflows related to a business transaction object	SAP GUI	View tasks of workflows related to a business transaction object
View tasks of workflows related to types of CRM business objects other than business transactions	Not available	View tasks of workflows related to a business object

5.8.7 SAP Jam Integration

The current enhancement package of SAP CRM 7.0 enables you to create groups in SAP Jam and view feeds from SAP JAM.

Enhancements

Table 51

Function in SAP CRM 5.0	5.0 UI	Enhancement Up to the Current Enhancement Package of SAP CRM 7.0
SAP Jam Feeds on Home Center	Not available	View SAP Jam personal feeds available on the following business roles: <ul style="list-style-type: none"> • Sales professional • Service professional • Marketing professional • IT service professional
SAP Jam Feeds on Business Object Overview Page	Not available	View SAP Jam feeds related to a business object for the following business object types: <ul style="list-style-type: none"> • Opportunity • Sales quotation • Account

Function in SAP CRM 5.0	5.0 UI	Enhancement Up to the Current Enhancement Package of SAP CRM 7.0
		<ul style="list-style-type: none"> • Service order • Service request or incident • Marketing plan • Marketing campaign • Segmentation model
SAP Jam Groups on Business Object Overview Page	Not available	<p>Create, update, and display SAP Jam groups related to a business object for the following business object types:</p> <ul style="list-style-type: none"> • Opportunity • Sales quotation • Account • Service order • Service request or incident • Marketing plan • Marketing campaign • Segmentation model

6 Solution-Wide Topics

6.1 Integration of SAP BusinessObjects

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 52

Topic	Information Source
General Information	SAP Library for SAP ERP or SAP Library for SAP Customer Relationship Management on SAP Help Portal at help.sap.com/erp606 or help.sap.com/crm In SAP Library, choose SAP Business Suite > Processes and Tools for Enterprise Applications (CA-EPT) > Embedded Analytics .
Installation Information	SAP Service Marketplace at service.sap.com/bosap-instguides and SAP Help Portal at help.sap.com/SAP BusinessObjects > All Products
Configuration Information	SAP Solution Manager under Solutions/Applications > Basic Configuration > Embedded Analytics
Installation Instructions	SAP Notes 1353044 (<i>Crystal Reports Viewer for Business Suite Applications 1.0</i>) and 1345320 (<i>Crystal Reports with Queries</i>)

6.2 Service-Oriented Architecture (SOA)

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.

6.2.1 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](#).

i 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, see the SAP Library at: [▶ help.sap.com/nw73 ▶ SAP NetWeaver 7.3 Library English ▶ SAP NetWeaver Process Integration ▶ Concepts ▶ Installation and Connectivity Options ▶ Advanced Adapter Engine Extended ▶](#) and SAP Note [1573180](#).

i 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.

- **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 and to view enterprise service models.

i Note

In a SAP NetWeaver 7.0x landscape you will require the Integration Repository to create and enhance enterprise service definitions in a design time environment.

- **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 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.

- **SAP Solution Manager 7.0 EHP 1**

The Solution Composer, shipped with SAP Solution Manager 7.0 EHP 1 SP 23, is required to host the enterprise service online documentation.

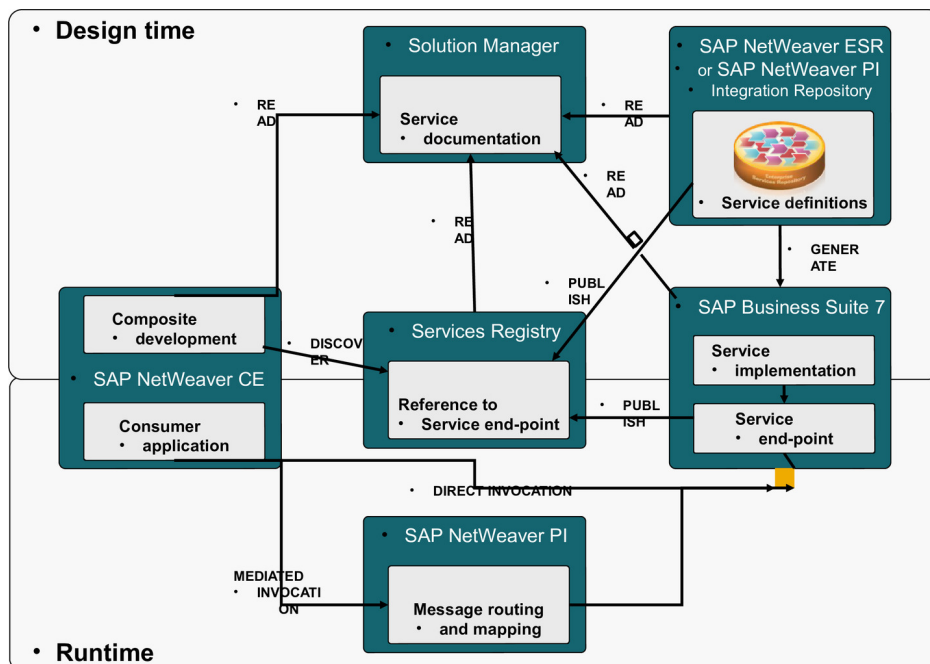


Figure 9: Overview: SAP's Applications for SOA Enablement

The following table describes the SAP applications required or recommended for different runtime and design time use cases:

Table 53

	SAP Applications					
	SAP Business Suite	SAP NetWeaver PI 7.0x (Integration Repository)	SAP NetWeaver PI 7.1 or higher (ES Repository)	SAP NetWeaver CE 7.1 or higher (ES Repository)	SAP Solution Manager 7.0 EHP1 or higher (Solution Composer)	SAP NetWeaver 7.1 or higher Services Registry
Runtime Usage:						
Enterprise Service Provisioning	Required					Optional
Process integration and mediated communication		One option required				
Design Time Usage:						
Create and enhance enterprise service definitions	Required	One option required			Recommended	

View enterprise service models			One Option Required		Recommended	
Design and develop composite applications				Required	Recommended	Recommended
Enterprise service online documentation					Required	
Publications of enterprise service end-points					Optional	Required

6.2.2 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 [1566412](#) 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 implementations.

- **Enterprise service definitions for SAP NetWeaver PI 7.0x or ES Repository (SAP NetWeaver 7.1 or higher)** (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 7.0 or higher. Unpack the ZIP file and copy the tpz files corresponding to your SAP

NetWeaver 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](#) ►)

- **Enterprise service models for ES Repository (SAP NetWeaver 7.1 or higher)** (optional)

To install the content required for the enterprise service models you must select the technical usage “ESR Content” in the enhancement package installation process. This usage type downloads the content files for SAP NetWeaver ES Repository 7.1 or higher. Unpack the ZIP file and copy the tpz files into the import directory of your Enterprise Services Repository. Use the import function to import the content files into the Enterprise Services Repository. (Choose ► [Tools](#) ► [Import design objects](#) ►)

i Note

The enterprise service models are not available for the Integration Repository (SAP NetWeaver PI 7.0x)

- **Enterprise service online documentation for Solution Composer** (optional)

To install the content required for the enterprise service online documentation you must download the content file for the corresponding Business Suite application product version from the Service Marketplace. Then you must import the content file into your Solution Composer. Refer to SAP Note [1224284](#) for further information.

- **Services Registry** (optional)

The services registry is shipped starting with SAP NetWeaver PI 7.1 and CE 7.1. You must install 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 installation of SAP NetWeaver PI, CE and ES Repository, refer to the corresponding SAP NetWeaver Installation and Master Guides.

6.2.3 Related Documentation

For more information about the service-oriented architecture (SOA), see the following information sources:

- SDN Community in the SAP Network at www.sdn.sap.com/irj/sdn/soa (registration required)
- The SAP Enterprise Service Workplace at ESWorkplace.sap.com
- The Enterprise Services Wiki in the SAP Network at wiki.sdn.sap.com/wiki/x/LQ0 (registration required)
- SAP Note [1224284](#): Enterprise Services, Installing and Accessing the SOA Documentation
- SAP Note [1359215](#): Technical prerequisites for using enterprise services (relevant for *ERP* only)
- SAP note [838402](#): Problems with non-Unicode system landscapes

6.3 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.

The following figure shows a typical development landscape:

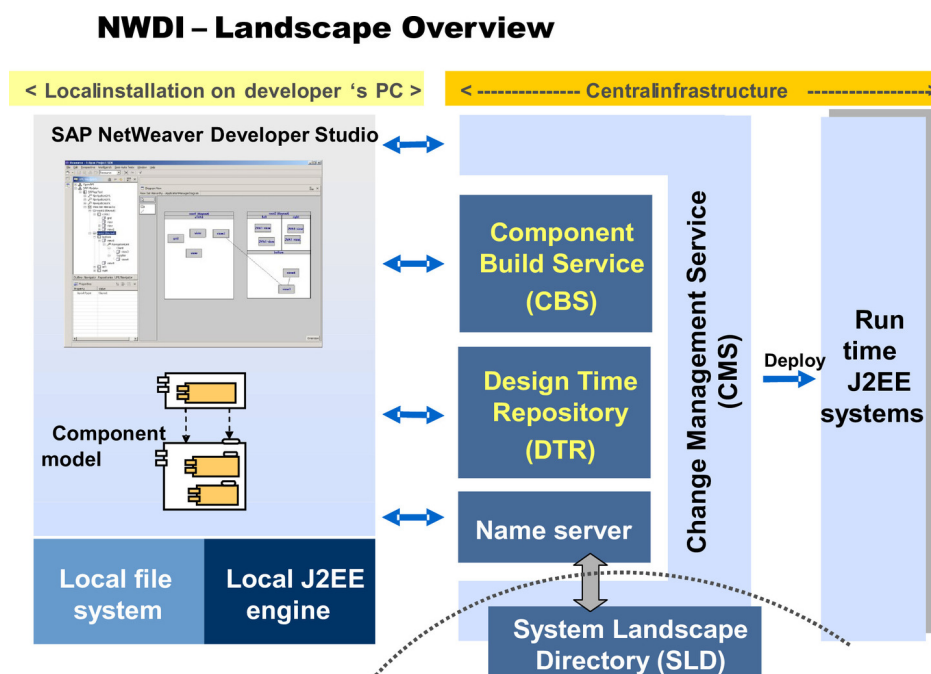


Figure 10

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 implementing SAP NetWeaver and required SAP components, see the SAP NetWeaver Master Guide. If you are planning a NetWeaver upgrade, make sure to check the SAP NetWeaver Upgrade Master Guide of the SAP NW upgrade target release. The SAP NetWeaver Upgrade Master Guide

contains specific information about SAP NetWeaver prerequisites, upgrade paths, and upgrade dependencies.

You find the guides for the SAP NetWeaver Platform on the SAP Help Portal at help.sap.com/netweaver.

For more information about working with the development infrastructure, see SAP Library for SAP NetWeaver at [▶ SAP NetWeaver Developer's Guide ▶ Fundamentals ▶ Using Java ▶ Working with the Development Infrastructure ▶](#).

For more information about setting up your NWDI landscape, see the documentation in SAP Library for SAP NetWeaver at [▶ SAP NetWeaver Developer's Guide ▶ Fundamentals ▶ Using Java ▶ Working with the Development Infrastructure ▶ Administration of the Development Infrastructure ▶ Organizing the Landscape ▶ Setting Up the Development Landscape: Landscape Configurator ▶](#).

For more information about modifying and extending SAP CRM 7.0 Java components, see the *SAP E-Commerce 7.0 Development and Extension Guide* and the corresponding tutorial available on SAP Service Marketplace at [▶ service.sap.com/crm-inst ▶ SAP CRM 7.0 ▶ Operate ▶](#).

6.4 Customizing Scout

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

support.sap.com/solutionmanager

6.5 Application Enhancement Tool

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.

i 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

SAP Library at help.sap.com/crm > <choose release> > *Application Help* > *WebClient UI Framework* > *Application Enhancement Tool* 

6.6 Easy Enhancement Workbench

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

SAP Library at help.sap.com/crm > <choose release> > *Application Help* > *Basic Functions* > *Enhancements with the Easy Enhancement Workbench in SAP CRM*.

6.7 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 service.sap.com/instguides > *SAP NetWeaver* > *SAP NetWeaver <release>* > *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 service.sap.com/crm-inst > <choose release> > *Operate*.

6.8 RosettaNet

RosettaNet is a standard for high-tech industries. RosettaNet, a self-funded, nonprofit organization, is a consortium of major information technology, electronic components, and semiconductor manufacturing companies working to create and implement industry-wide, open e-business process standards. These standards form a common e-business language, aligning processes between supply chain partners on a global basis.

RosettaNet standards offer a robust nonproprietary solution, encompassing data dictionaries, implementation framework, and XML-based business message schemas and process specifications for e-business standardization.

RosettaNet Partner Interface Processes® (PIPs®) define business processes between trading partners. PIPs are specialized system-to-system XML-based dialogs. Each PIP specification includes a business document with the vocabulary, and a business process with the choreography of the message dialog.

For integration with external systems, SAP Customer Relationship Management (CRM) provides open XML messaging interfaces and IDoc interfaces. When a buyer system sends a message in a RosettaNet message format to the CRM system, the RosettaNet mappings map the inbound message to a CRM IDoc message format. After processing an inbound message, the CRM system sends an outbound message, in a CRM IDoc format, to the buyer system. RosettaNet mappings map this outbound message to a RosettaNet message format, understood by the buyer system. This mapping has been implemented as platform-independent XSL templates.











For more information, see the documentation at service.sap.com/instguides > *Industry Solutions* > *Industry Solution Master Guides* > *SAP for High Tech*.




















A Appendix

A.1 List of SAP Notes

The following table lists all SAP Notes mentioned in this Master Guide.

Table 54

Area	SAP Note Number	Title
Cross-component	1497032 	Release and Information Note for EHP2 for SAP CRM 7.0, SP-Stack 01
Cross-component	1371027 	Delivery of TERM and GLOSSARY Texts in SAP_BASIS 7x Products
Client	1118231 	Supported user interfaces for SAP CRM
Client	1600364 	EHP2 for SAP CRM 7.0 Internet Browser Releases
OLTP Integration	704564 	R/3 Plug-In: PI 2004.1 installation/delta upgrade
CRM Mobile	593417 	BackWeb ProactivePortal server, Standard Edition for SAP
Mobile Client Companion	989495 	Prefill Entries for SAP Mobile Client Companion Mobile Client Companion related Customizing metadata is part of this note.
Mobile Client Companion	1093662 	Environment Checker for Mobile Client Companion Environment Checker is a tool that helps analyze the environment on the laptop necessary for the Mobile Client Companion scenario.
Mobile Client Companion	1075813 	Consulting Note for Mobile Client Companion Cab Files Installation
Interaction Center (IC) WebClient	894493 	Frequently Asked Questions about Fax and Letter
Partner Channel Management	1138855 	Partner Channel Management Authorization Roles
Partner Channel Management	1111654 	Partner Channel Management Upgrade from CRM 5.0
Partner Channel Management	1119251 	Partner Channel Management Upgrade: New BP role PRCONT

Area	SAP Note Number	Title
Partner Channel Management	1119661 	Partner Channel Management Upgrade: Regenerate PDF
CRM UI Framework (SAP CRM UIF) and TPM	1072595 	Flex table integration with key figure planning This relates to flex tables and the version of Adobe Flash Player.
SAP NetWeaver Business Warehouse	153967 	BI Content Release Strategy
SLD	669669 	Updating the SAP Component Repository in the SLD
Process Integration	1515223 	SAP NetWeaver Process Integration: Release Recommendation This SAP note sets out our recommendation on which release of SAP NetWeaver PI you should use.
Process Integration	836200 	SAP NetWeaver 7.0: Importing process integration content.
Internet Pricing and Configurator	854170 	Switching on component VM Container
SAP NetWeaver	1080594 	Installing CPRXRPM 400 SR1 on Basis Release 700
SAP NetWeaver	1040325 	HTTP load balancing: Message Server or Web Dispatcher?
Workforce Deployment	1246105 	CRM 7.0 Resource Planning and LiveCache component
Workforce Deployment	830595 	Installing WFMCORE 200
Workforce Deployment	836414 	Installing LCAPPS 2005_700
CRM Interactive Reporting	1110780 	FAQ for CRM Interactive Reporting
CRM Interactive Reporting	1401472 	Setting up BI reporting along with Interactive reporting
SAP GUI	147519 	Maintenance strategy / deadlines 'SAP GUI'
General	337623 	Customizing after installation or upgrade
General	1613657 	Release upgrade from 7.0 EHP2 to 7.0 EHP3 (7.03)
General	837413 	Support Package levels for CRM installations/ upgrades
Migration	1037748 	Enhancing the CRM WebClient UI for business transactions

Area	SAP Note Number	Title
Migration	1026956	Products / objects: search extension
Migration	1088910	CRM WebClient UI: Additional fields in product header view
Migration	1026475	Products / Objects: assignments not visible on overview page
Migration	1072595	Flex table integration with Key Figure Planning service
Migration	976438	Migration of existing mapping formats
Migration	1025569	Copying new mapping formats
Migration	817119	Naming SAP E-Commerce / SAP CRM Web Channel
Migration	980915	XML export only possible to application server file system
Migration	988965	Proxy error message
Migration	1457223	Collaborative Contract Negotiation not available CRM 7.0 EhP1
Migration	1732061	Central Note - Software Update Manager 1.0 SP07
Migration	1637366	Installation of SAP EHP3 for SAP NetWeaver 7.0
Segmentation	1565886	Missing Number Ranges in Segmentation After Upgrade
SAP Organizational Management CRM	1635858	Multiple implementations under BADI HRALE00 INBOUND_IDOC in CRM system - "SINGLE_EXIT_MULTIPLY_ACTIVE"

A.2 Related Information

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

Table 55

Content	Location
The latest versions of installation guides for SAP CRM	service.sap.com/crm-inst <i>SAP CRM <choose release>Install</i>
Sizing of SAP CRM	service.sap.com/quicksizer

Content	Location
Information about released platforms and technology-related topics (for example, maintenance strategies, language support)	<p>▶▶ service.sap.com/platforms ▶▶</p> <p>To access the Product Availability Matrix directly, enter</p> <p>▶▶ support.sap.com/pam ▶▶</p>
Information about network security	service.sap.com/securityguide ▶▶
Guide finder for technical documentation in SAP NetWeaver	▶▶ help.sap.com/nw ▶▶ <i>SAP Netweaver <choose release></i> ▶▶ <i>Installation and Upgrade Information</i> ▶▶ <i>SAP NetWeaver Guide Finder</i> ▶▶

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 ▶▶ 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:

- SAP Help Portal at ▶▶ help.sap.com/crm-core ▶▶ *<choose a release>* ▶▶ *Application Help* ▶▶

i 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


Tool	Purpose
Solution Manager System Landscape (transaction SMSY)	To model and set up your system landscape
Maintenance Planner	To plan updates, upgrades, and new installations in your system landscape
Business Process Repository	To access configuration documentation, links to Customizing activities and master data transactions, specifically tailored for individual business processes, business scenarios, or implementable steps
Business Process Change Analyzer (available with SAP enhancement package 1 for SAP Solution Manager 7.0)	To analyze the effects of transports and support packages as well as activation logs for business functions

Note

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

- SAP Solution Manager 7.0 EHP1, SPS23 or higher
- SAP Solution Manager 7.1, SPS01 or higher

SAP Solution Manager 7.0 EHP1, SPS23 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 [▶ service.sap.com/solutionmanager](https://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 (SP31).

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 [▶ www.sdn.sap.com/irj/sdn](https://www.sdn.sap.com/irj/sdn)  [Application Lifecycle Management](#) [Technical Enablement](#) [Update and Upgrade](#) [Related Areas on Upgrade and Update Management](#) [Landscape Verification](#)  (www.sdn.sap.com/irj/sdn/alm?rid=/webcontent/uuid/70fc3790-7ec9-2d10-57ad-95b2d0d1185d .

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 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

Procedure

Calling Up the BPR Viewer

You can call up the BPR viewer directly using the Internet address implementationcontent.sap.com/bpr. Alternatively, you can also call up the Internet address 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 57

BPR Object	Location
Business scenario	Under <i>Solutions/Applications</i>
Business process	Under <i>Organizational Areas</i>
Implementable step	Under <i>Solutions/Applications</i>

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.

i 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.

Typographic Conventions

Table 58

Example	Description
<Example>	Angle brackets indicate that you replace these words or characters with appropriate entries to make entries in the system, for example, "Enter your <User Name>".
▶ Example ▶ Example ▸	Arrows separating the parts of a navigation path, for example, menu options
Example	Emphasized words or expressions
Example	Words or characters that you enter in the system exactly as they appear in the documentation
www.sap.com 	Textual cross-references to an internet address
/example	Quicklinks added to the internet address of a homepage to enable quick access to specific content on the Web
123456 	Hyperlink to an SAP Note, for example, SAP Note 123456 
<i>Example</i>	<ul style="list-style-type: none"> Words or characters quoted from the screen. These include field labels, screen titles, pushbutton labels, menu names, and menu options. Cross-references to other documentation or published works
Example	<ul style="list-style-type: none"> Output on the screen following a user action, for example, messages Source code or syntax quoted directly from a program File and directory names and their paths, names of variables and parameters, and names of installation, upgrade, and database tools
EXAMPLE	Technical names of system objects. These include report names, program names, transaction codes, database table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE
EXAMPLE	Keys on the keyboard

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