



Master Guide | PUBLIC

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Master Guide - SAP CRM 7.0 EHP4

Using SAP CRM 7.0, SAP ERP 6.0, and SAP NetWeaver 7.5

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Document History

→ Recommendation

Before you start the implementation, make sure you have the latest version of this document. You can find the latest version at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.

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

Version	Date	Description
1.00	2016-01-20	First version
1.01	2016-05-04	<ul style="list-style-type: none">• Updated navigation paths and release information throughout the guide.• Updated information about SAP NetWeaver releases in section <i>SAP CRM Overview → System Landscapes</i>.
1.02	2021-03-29	Updated document classification

1 About This Document

Use

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

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

In addition, you need further information that cannot be covered by the Master Guide during your planning process. See [Related Information \[page 100\]](#) for references to further information sources.


The Master Guide consists of the following main sections:

- [Installation and Upgrade of SAP Enhancement Packages \[page 8\]](#)
This section introduces you to the concept of SAP enhancement packages and describes how to implement them.
- [SAP CRM Overview \[page 24\]](#)
This section introduces SAP CRM and its installable software units. It also provides information about the SAP CRM system landscape as well as information about the sequence of the implementation steps or upgrade steps.
- [Solution-Wide Topics \[page 88\]](#)
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. It also includes a chapter on tools for planning your system landscape.

Caution

Make sure you have the latest version of the Master Guide before starting the installation or upgrade. You can find the latest version at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest

SAP Fiori Apps

For information regarding SAP Fiori for SAP CRM, see SAP Help Portal at <http://help.sap.com/fiori> .

Constraints

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

2 SAP Enhancement Packages

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

Use

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

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

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

Implementation

There are three different scenarios to implement an enhancement package:

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

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

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

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

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

For a better understanding of the general concepts and principles of updating a system, see the *Maintenance Planning Guide* at <http://help.sap.com>.

Tools

The enhancement package installation requires the following tools:

1. **SAP Solution Manager**

i Note

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

Tool versions:

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

- SAP Solution Manager 7.0 EHP1, SP23 or higher
- SAP Solution Manager 7.1, SP01 or higher

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

For more information, see SAP Help Portal at https://help.sap.com/viewer/product/SAP_Solution_Manager.

System Landscape Maintenance with SAP Solution Manager:

Make sure that you have correctly defined and maintained your system landscape in SAP Solution Manager:

- SAP Solution Manager 7.0: Use the SAP Solution Manager System Landscape (transaction `SMSY`) for the complete system description.
- SAP Solution Manager 7.1 SP01 to SP04, use the Landscape Management Database (transaction `LMDB`) to maintain technical system information. For logical product system information, use transaction `SMSY`.
- SAP Solution Manager 7.1 SP05 and higher, use the Landscape Management Database (transaction `LMDB`) for the complete system description. (The transaction `SMSY` is no longer required.)

For more information about the Landscape Management Database (LMDB), see <http://help.sap.com/solutionmanager71> ➤ *Application Help* ➤ *SAP Library SAP Solution Manager 7.1 <SP version>* ➤ *SAP Solution Manager Operations* ➤ *Managing System Landscape Information* ➤.

Landscape Verification with SAP Solution Manager:

To verify and correct your system landscape, SAP highly recommends that you use the verification functions of the SAP Solution Manager:

→ Recommendation

Before installing the enhancement package, we recommend that you run a landscape verification to check your landscape setup and your system descriptions, and to correct data if necessary.

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

For more information about the landscape verification, see the SAP Community Network at <http://scn.sap.com/docs/DOC-8793> ➤.

2. Installation or upgrade tools (depending on your scenario)

- SAP Solution Manager Maintenance Optimizer (MOPz)
The *SAP Solution Manager Maintenance Optimizer (MOPz)* (accessible from the *Change Management* work center) supports the download of a consistent queue that includes all necessary Support

Packages and enhancement packages. In addition, SAP Solution Manager calculates a valid import queue for the selected SAP system and generates the enhancement package stack configuration file that you require for the installation.

- Software Provisioning Manager 1.0

For the new installation of an SAP system including an enhancement package you use the standard installation tool [software provisioning manager 1.0](#).

- Software Update Manager (SUM)

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

2.2 Key Facts About Enhancement Packages

Use

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

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

Test the installation process and activation of new functions in advance on a sandbox system. Ensure that you evaluate the runtime and the SAP system behavior, its dependencies and impacts. Make sure that your SAP system is free of errors before going live.

3 Main Implementation Processes and Related Documentation

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

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

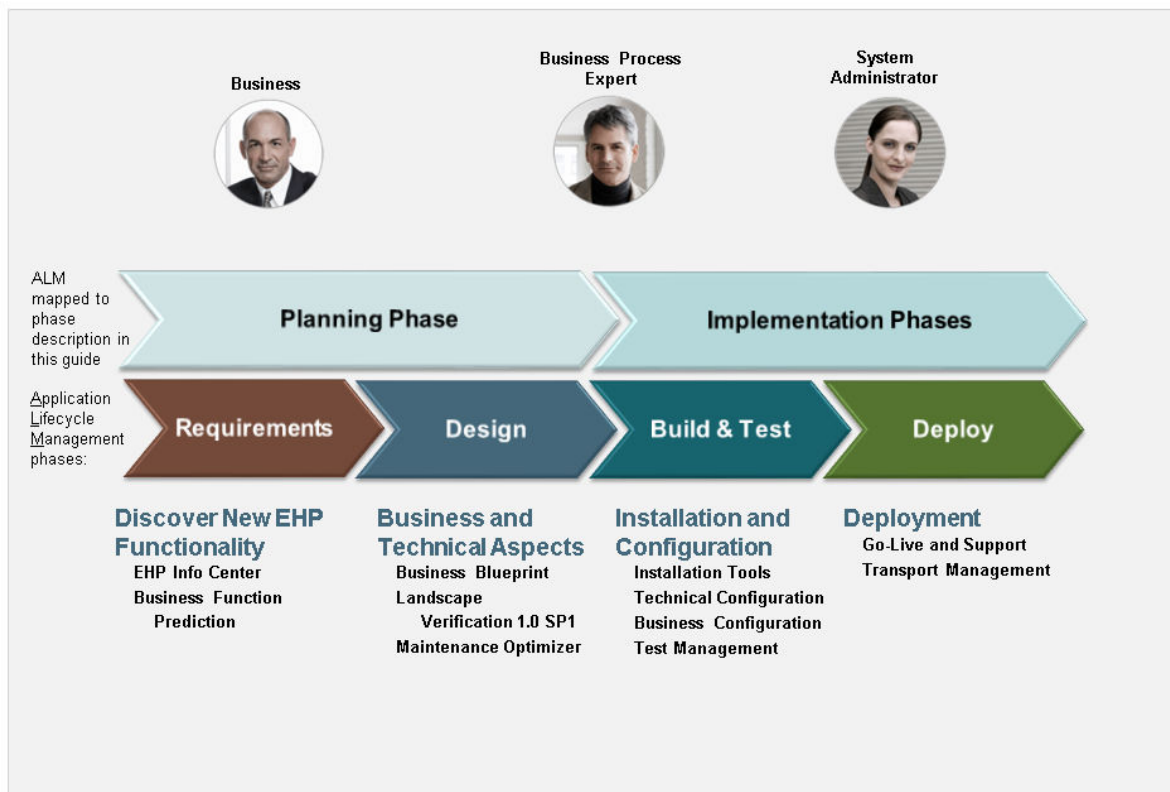
Each of the implementation processes consists of a planning phase and an implementation phase. Each phase is divided into steps that describe the processes in detail. Each step contains references to the corresponding documentation to ensure that you can easily find the information you need.

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

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.



Application Lifecycle Management

For more information about Application Lifecycle Management, see <http://support.sap.com/solution-manager/processes.html>.

The processes are described in the following sections:

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

3.1 Planning for Installation, Update, and Upgrade Processes






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










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


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.

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 on the Web page for SAP Enhancement Packages for SAP CRM [1].</p> <p>You can use <i>Innovation Discovery for SAP Products</i> to find innovations and features by release [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. https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest2. https://zinnovationdiscovery-supportportal.dispatcher.hana.ondemand.com3. http://help.sap.com/crm-core  <choose release>  Application Help  Business Functions for SAP Customer Relationship Management 
Dependencies to Other Systems in the Landscape	<div><div>i Note</div><p>Only relevant for upgrades.</p><p>The upgrade of one SAP system might have an impact on other systems in your system landscape. Check whether such dependencies exist using the Upgrade Dependency Analyzer.</p></div>	<p>https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest</p>
Landscape Planning	<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 planning guide for SAP business suite landscape implementation.</p>	<p>https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest</p> <p>For more information, see SAP Note 1388258 .</p>

Steps	Step Description	Documentation
Business Functions	<p>Identify the business functions that you wish to activate based on your business needs.</p> <div> <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>http://help.sap.com/crm-core  <choose release>  Application Help  Business Functions for SAP Customer Relationship Management </p>
Hardware & Software Prerequisites	<p>Check the availability of the required SPs or SP stack of the application as well as for the corresponding SAP NetWeaver release. The upgrade stops if the equivalent support package of the target release is missing. It is not a prerequisite and not recommended to implement the latest SP stack in your source system before doing an upgrade or EHP implementation.</p> <p>The support package equivalence levels are described in SAP Notes [1].</p> <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 Support Portal [3].</p>	<ol style="list-style-type: none"> SP Stack notes: <ul style="list-style-type: none"> SAP Note 837413  (SAP CRM) SAP Note 789220  (SAP NetWeaver) http://help.sap.com/slttoolset  Software Update Manager (SUM) <Version>  http://support.sap.com/sp-stacks 









Steps	Step Description	Documentation
	Check which platforms are supported for your target release (OS/DB dependencies) with the Product Availability Matrix.	http://support.sap.com/pam 
	Check which hardware sizing is required for your target release.	For initial sizing, use the Quick Sizer results for database size (disk) and CPU requirements (SAP Application Performance Standard) as input for HANA main memory, disk space, and CPU sizing. You can find the Quick Sizer at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest .
Solution Manager Prerequisites	<p>Make sure that your SAP Solution Manager system has the content ST-ICO 150_700 SP 38 and the support package (SP) level SAP Solution Manager 7.1 SP Stack 04.</p> <div data-bbox="466 987 858 1178" data-label="Complex-Block"> <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. • Update from source releases SAP Solution Manager 7.0. <p>After an upgrade or update to SAP Solution Manager, you must do the follow-up actions for software change management explained in the guide for solution operations.</p>	All SAP Solution Manager guides are available at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest .
Add-on Compatibility	If you want to use add-ons, check their compatibility with your target release.	SAP Note 2168082 

Steps	Step Description	Documentation
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 the Impact Analyzer tool [2] and you can access test cases for individual business functions [3].</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>.
<div> <div>i Note</div> <div>Switch BC Sets are also delivered with business functions. They are automatically unpacked when you activate the business function.</div> </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.

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. 	See the guide at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest .
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>	See the guide at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest .
3 Installation	<p>If required, install the database with the DB-specific installer.</p> <p>Run SAPinst to install your system.</p>	See the guide at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest .
4 Post-Installation Steps	<p>Check the relevant installation tool guides and the SAP application-specific installation information in this guide.</p>	See the guide at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest .

Sequence of Steps	Step Descriptions	Documentation
5 Content Installation	If required, you install SAP Business Warehouse content as an add-on as described in the relevant SAP Note.	SAP Note 1000822 
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). 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"> 1. <i>Maintenance Planning Guide for SAP Solution Manager</i> at http://wiki.scn.sap.com/wiki/x/VlwqCw  under the section <i>Guides</i>. 2. http://www.sdn.sap.com/irj/sdn/nw-sld  3. <ul style="list-style-type: none"> ◦ http://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 .
7 Support Package Installation	<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>	<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. http://support.sap.com/sp-stacks 

i Note

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).

Sequence of Steps	Step Descriptions	Documentation
8 Configuration	<p>Configure new functions, for example new business functions, with the Solution Manager content [1].</p> <div> <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. http://help.sap.com/solutionmanager  <p> <i>SAP Solution Manager</i> <version> </p>
9 Testing	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.

3.3 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.









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 http://wiki.scn.sap.com/wiki/x/VlwqCw under the section <i>Guides</i>. 2. http://www.sdn.sap.com/irj/sdn/nw-sld 3. <ul style="list-style-type: none"> ◦ http://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 guide at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.</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 https://apps.support.sap.com/sap/support/mp.</p>
4 Enhancement Package Update	<p>Run Software Update Manager to update your system with the software packages calculated in step 3.</p>	<p>See the guide at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.</p>
5 Follow-Up Steps	<p>Perform technical and application-specific follow-up activities (for example, activating business functions) after the enhancement package installation is done.</p>	<p>See the guide at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.</p>

Sequence of Steps	Step Descriptions	Documentation
6 Content Update	<p>Check if you need to update content related to:</p> <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] <p>For more information, see SAP Note 1388258.</p>	<ol style="list-style-type: none"> 1. See the Help Portal at http://help.sap.com/sltool-set 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 http://help.sap.com .
7 Configuration	<p>Configure newly installed enhancement package functions, for example new business functions with the Solution Manager content [1].</p> <div> <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 in Planning for Installation, Update, and Upgrade Processes [page 13] for the correct SAP Solution Manager content release. 2. http://help.sap.com/solutionmanager
8 Configuration	<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>

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.

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 http://wiki.scn.sap.com/wiki/x/VlwqCw under the section <i>Guides</i>. 2. http://www.sdn.sap.com/irj/sdn/nw-sld 3. <ul style="list-style-type: none"> ◦ http://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 https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest at .</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 https://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 at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.</p>
5 Post-Upgrade Steps	<p>Perform technical and application-specific follow-up activities after the upgrade is finished.</p>	<p>See the guides at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.</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] You use the Software Update Manager (SUM) to update portal content. • SAP Business Warehouse [2] • SAP NetWeaver Process Integration [3] <p>For more information, see SAP Note 1388258 </p>	<ol style="list-style-type: none"> 1. See the Help Portal at http://help.sap.com/slttoolset  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 http://help.sap.com .
7 Configuration	<p>Configure upgraded or new functions, for example new business functions, with the Solution Manager content [1].</p> <div style="background-color: #f0f0f0; padding: 10px; border: 1px solid #ccc;"> <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 in Planning for Installation, Update, and Upgrade Processes [page 13] under for the correct SAP Solution Manager content release. 2. http://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 devices, the Web, and telephones or e-mail. SAP ERP systems can be used as back-end systems, whereas SAP Business Warehouse (SAP BW) and SAP Supply Chain Management (SCM) enhance the spectrum of functions.

4.2 Installable Software Units

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

Software Unit Group	Description
CRM Core [page 25]	<p>Software units that are essential for your CRM system landscape:</p> <ul style="list-style-type: none">• CRM Application Server ABAP• CRM Application Server Java• WebClient UI <p>For more information, see Developing and Modifying Applications: SAP NetWeaver Development Infrastructure [page 92].</p>
CRM Mobile Client Component [page 31]	Components required for a mobile system landscape
Workforce Deployment [page 33]	Component required for service orders

Software Unit Group	Description
Standalone Components [page 33]	Components that provide additional functions. In most cases their use is optional.
Application Systems [page 35]	SAP ERP back end, as well as SAP Business Warehouse (SAP BW), SAP SCM server, and SAP SRM server
SAP Solution Manager [page 37]	SAP Solution Manager is mandatory for an SAP CRM implementation.
Content Types [page 38]	Different types of content that are available for SAP CRM, for example, content for the System Landscape Directory

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 at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.

4.2.1 CRM Core

Installable software units of CRM Core

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

The detailed structure of CRM Core is as follows:

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

CRM Application Server Java consists of the following software components:

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

⚠ Caution

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

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

- **NWDI Design/Build Time Content**

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

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

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.

Using CRM Core with and without CRM Application Server Java

You can distinguish between the following:

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

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

- CRM Web Channel
- Business scenarios in which you want to use product configuration, for example, the business process *Sales Order Processing (Configure-to-Order) in CRM*.


You only need to install SAP NetWeaver Application Server Java for the following applications:

- SAP NetWeaver Exchange Infrastructure

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

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

i Note

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


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

WebClient UI

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

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

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

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

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

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 the guides at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.

Components of the WebClient UI

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

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

- **Presentation layer**
The business server pages (BSPs) are the presentation layer of the WebClient UI. They are the basis for the HTML pages.
- **Business layer**
Data of business objects, such as business partners, products, and transactions are processed by the business layer of the WebClient UI. The business layer comprises the following parts:
 - **Business object layer (BOL)**
The BOL stores the business object data at runtime of a WebClient UI session. It ensures the separation of the user interfaces and the underlying business logic.
 - **Generic interaction layer (GenIL)**
The GenIL processes the data transfer from the BOL to the application programming interfaces (APIs) of the underlying CRM business engine, that is, application logic and database tables. The GenIL connects the BOL to the underlying business logic and database.

Internet Communication Framework

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

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

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

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, search for *Activating and Deactivating ICF Services* in the documentation at <http://help.sap.com>



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

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

For more information about creating the URL for the WebClient UI, search for *Accessing a BSP Application* in the documentation at <http://help.sap.com>.

Note

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

SAP NetWeaver Portal and Business Package

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

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

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

For more information about portal integration, see the following:

- Customizing for Customer Relationship Management under ► *UI Framework* ► *Portal Integration* ► *Overview* ►
- SAP Library for Customer Relationship Management at <http://help.sap.com/crm> ► <choose release> ► *WebClient UI Framework* ► *Portal Integration* ►

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

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

UI Configuration

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

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

- Adding new fields and tables to business objects
- Positioning fields on views
- Renaming field labels
- Using personalization
- Defining captions
- Defining navigation bar entries
- Creating business roles

The CRM UI configuration tool is an easy to use tool for adjusting the CRM standard views to your needs. For example, project team members or consultants can adjust the UI and use the tool for the following activities:

- Configuring pages
- Configuring blocks
- Configuring fields

Custom UI Enhancements

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

- Checking general consistency
In Customizing for Customer Relationship Management, choose ► [UI Framework](#) ► [UI Framework Definition](#) ► [Perform WebClient UI Framework Checks](#) ► to analyze the consistency of UI repository data and configuration data. If errors are detected, you can navigate from the error messages to the affected system objects.
- Checking runtime repositories
In Customizing for Customer Relationship Management, choose ► [UI Framework](#) ► [UI Framework Definition](#) ► [Compare Runtime Repositories](#) ► to compare the runtime repository of an enhanced UI component with the SAP standard runtime repository.

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

SAP GUI

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

⚠ Caution

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

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

For information about the SAP GUI, see the following:

- SAP Community Network at <http://www.sdn.sap.com/irj/sdn/sap-gui>
- *Master Guide SAP NetWeaver 7.5* available at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.

4.2.2 CRM Mobile Client Component

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

Structure of CRM Mobile Client Component

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

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

Components and Their Use

Mobile Client

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

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

Caution

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

Mobile Application Studio

The Mobile Application Studio (MAS) must be installed on the mobile development workstation. It is an object-oriented, visual development tool that is tailored to the architecture of SAP mobile client applications. It allows

you to customize mobile client applications, delivered by SAP, according to your specific business requirements, or develop your own applications.

Mobile Application Repository

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

Authorization Management Tool

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

Communication Station

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

Installation of CRM Mobile Client Component

The installation of mobile client components requires certain .NET installations. For more information, see the installation guide for mobile clients at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.

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

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.

4.2.3 Workforce Deployment

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

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

- Workforce Deployment (WFMCORE 200 Add-On): You have to install this add-on on the CRM server ABAP by using the SAP Add-On Installation Tool (SAINT). For more information, see SAP Notes [830595](#) and [836414](#).
The component version needed is WFMCORE 2.00 SP13.
- SAP liveCache (LCAPPS_2005_700) is a database engine for managing complex objects in scenarios where large volumes of data must be permanently available and modifiable. It is an optional component that you only need for high volume capacity-based planning, running of scheduling strategies, and workload balancing. SAP liveCache is installed by using SAPinst.
- SAP cProject Suite (CPRXRPM 400)
The minimum component version needed is CPRXRPM 400 SP11.
- SAP Visual Business is a user interface technology that you can use to visualize data from SAP and external data sources on a single screen. If you use map integration in resource planning application, then front-end installation of SAP Visual Business 2.0 is required. For more information, see the installation guide and master guide for SAP Visual Business at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.

4.2.4 Standalone Components

Search and Classification (TREX)

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

→ Recommendation

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

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

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

Groupware Connector (Server Based Groupware Integration)

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

Desktop Connection for SAP CRM

Desktop Connection for SAP CRM is a more recent alternative for Groupware Connector. Desktop Connection for SAP CRM enables you to synchronize accounts, contacts, appointments, opportunities, leads, tasks, and 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 Gateway service.

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

Finbasis for CRM

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

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

SAP Real-Time Offer Management

SAP Real-Time Offer Management (RTOM) is an SAP solution extension that acts as a real-time decision support framework, providing intelligent product offers and marketing messages during inbound customer interactions. The solution is self-learning, leveraging the response from every interaction to make the next offer

more relevant and effective. You can use SAP Business Warehouse reports and xCelsius dashboards to analyze offer performance, channel performance, response profiles, and more.

For more information, see https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.

4.2.5 Application Systems

SAP ERP

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

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

SAP Supply Chain Management Server

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

SAP Business Warehouse

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

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

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

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

CRM Interactive Reporting

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

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

i Note

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

You cannot add custom fields to CRM interactive reports. For more information, see SAP Note [1110780](#).

⚠ Caution

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

CRM Interactive Reporting Based on SAP HANA VDM

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

SAP NetWeaver Process Integration

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

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

i Note

For information about the required PI, see SAP Note [1515223](#) and SAP Note [1648480](#).

4.2.6 SAP Solution Manager

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

Using SAP Solution Manager is mandatory for SAP CRM.

i Note

For information about availability of content specifically tailored to your solution, see https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.

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

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

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

→ Recommendation

Configure and test the previously defined business processes.

For more information, see the following:

- For instructions for setting up SAP Solution Manager to enable end-to-end lifecycle management tasks, see *Maintenance Planning Guide* at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest under the section *How-To's and Guides*.
- For system infrastructure, scenarios, installation, and configuration of SAP Solution Manager, see the master guide for SAP Solution Manager at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.
- For benefits, usage scenarios, and learning maps, see https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.
- For information about SAP Solution Manager as a tool, see https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest and the master guide for SAP NetWeaver 7.4 at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.

Note the following installation considerations:

- Each SAP CRM (or SAP NetWeaver) system landscape must be assigned to an installation of SAP Solution Manager. In the event of a support-relevant incident within your SAP system landscape, SAP support requires remote access to the SAP Solution Manager solution that hosts the affected system landscape.
- If you already have an SAP Solution Manager deployment in place, you can use it to manage the solution you built up with SAP NetWeaver and SAP CRM as well. In this case, we strongly recommend that you update SAP Solution Manager and Solution Manager content to the latest version.

- You can install multiple instances of SAP Solution Manager. In this case, each installation should host separate business solutions.
- If you want to reduce the risk of unavailability, do not install SAP Solution Manager as a central component. Instead, operate a 2-system landscape with test and production environment of SAP Solution Manager, especially if you are using time-critical functions such as support desk.

4.2.7 Extended Implementation Content in SAP Solution Manager

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

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

- Configuration information is assigned to all business processes. This process-specific configuration information always contains a clear reference to additional basic configuration settings that are available for the required components of a process. Therefore, when you include a business process in a self-defined scenario, you can easily identify all relevant configuration settings that are relevant for your project.
- Configuration information that is specific for an optional process step is directly assigned to that process step. Therefore, when you remove an optional process step from your project because you do not need it, the corresponding configuration activities are also automatically excluded from your implementation project.

For your implementation project, this means:

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

4.2.8 Content Types

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

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









- Enterprise Service Repository content


SAP Solution Manager Implementation Content

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

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

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

Download: from SAP Support Portal at <http://support.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 <http://help.sap.com/solutionmanager> .

BI Content for SAP Business Warehouse






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

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

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

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

- **Download of BI Content:**

From SAP Support Portal at <http://support.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 Support Portal at <http://support.sap.com/swdc> ► [SAP Software Download Center](#) ► [Support Packages and Patches](#) ► [Browse Download Catalog](#) ► [SAP NetWeaver and Complementary Products](#) ► [BI CONT](#) ►.

System Landscape Directory (SLD) Content

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

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

For information about updating SLD content, see SAP Note [669669](#) ►.

XI Content

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

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

Enterprise Service Repository Content

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

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

SAP has developed an advanced meta model and governance process to define and model enterprise services. Key concept is the business object model. Each enterprise service is assigned to a business object,

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

For more information, see SAP Library at <http://help.sap.com/crm> > <choose release> > *Application Help* > *Enterprise Services in SAP Customer Relationship Management*.

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

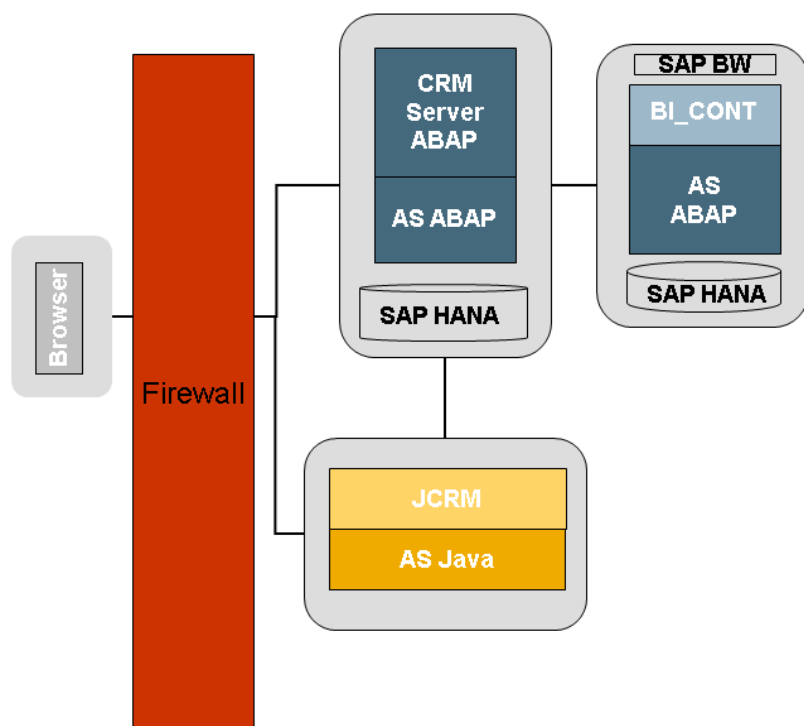
4.3 System Landscapes

Use

Note the following general recommendations:

- We recommend that you use SAP HANA as your database.
- You can install CRM Application Server ABAP and CRM Java Components on a common host or separately on different hosts. This applies to test systems as well as to production systems. You have to carry out 2 installation runs and make sure that ABAP and Java use 2 different system IDs (SID). If you install the ABAP and the Java system on different hosts, pay particular attention to the higher network load and plan sizing of the network accordingly.
- We recommend that you install SAP Business Warehouse (SAP BW) on a separate host from CRM Application Server ABAP. Technically, you only have to install the BI Content (BI_CONT) add-on on top of CRM Application Server ABAP. However, you have to be aware of the increased sizing requirements.
- If the CRM host is sufficiently sized, you can also install Search and Classification (TREX) on the same host. However, you have to check if this meets your security requirements.

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



Example of System Landscape

i Note

When you plan your system landscape, ensure that you read the infrastructure information in the master guide for SAP NetWeaver 7.50 at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.

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

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

More Information

SAP Note [2304435](#) 

4.4 Overall Implementation Sequence


Use

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

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

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

Note







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


Procedure

Step	Action [Corresponding Documentation]	Remarks and Subsequent Steps [Corresponding Documentation]
1	Installation of SAP Solution Manager and implementation content.	For release and guide information, see the Solution Manager prerequisites in the Planning for Installation, Update, and Upgrade Processes [page 13] section.



Step	Action [Corresponding Documentation]	Remarks and Subsequent Steps [Corresponding Documentation]
2	<p>Installation of Search and Classification (Trex) 7.1</p> <p>Use the following parameters for the Trex installation and post-installation tasks:</p> <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 this case you have to perform the post-installation steps to set up an HTTP connection. <p>Note that some applications use both the ABAP and the JAVA client.</p> <p>For more information, see the documentation at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.</p>	<p>To configure Trex, see the documentation in SAP Solution Manager at Solutions/Applications > Basic Configuration > Configuration Structures > SAP NetWeaver <choose release> > Standalone Engines > Search and Classification (Trex) >.</p> <p>The following scenarios use the Trex ABAP client:</p> <ul style="list-style-type: none"> Account and Contact Management with Channel Partners Collaborative Selling Quotation and Order Management for Business-on-Behalf Campaign Management in CRM Web Channel Catalog Management in CRM Contract Management in CRM Web Channel Quotation and Order Management in CRM Web Channel Web Auctions: Auctioning via Web Shop Complaints and Returns Management in CRM Web Channel Service Request Management Campaign Management Quotation and Order Management in CRM
3	<p>Installation of CRM Application server ABAP and CRM Application Server Java</p> <p>See the installation guides at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.</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>

Step	Action [Corresponding Documentation]	Remarks and Subsequent Steps [Corresponding Documentation]
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. See the guides at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest. 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>See the installation guides at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.</p>	None
5	<p>Setting up the CRM Mobile Client landscape:</p> <ul style="list-style-type: none"> Installation of the Communication Station See the installation guide for the communication station at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest. Installation of the local Microsoft SQL server on the mobile clients [Third-party documentation] Installation of SAP CRM Mobile Client Component (Mobile Application Studio, Mobile Application Repository, Mobile Client, AMT, CSDM) on the mobile repository server, mobile development workstations, and mobile clients See the installation guide for the SAP CRM mobile client at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest. Installation of optional third-party software 	You can install SAP CRM Mobile Authorization Management Tool (AMT) on the development workstation together with the Mobile Application Studio as well as on a separate server. While you can have multiple Mobile Application Studios in your system landscape, only a single AMT installation is required.
6	<p>Installation of Groupware Connector 5.0</p> <p>For more information, see the Groupware Connector guides at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.</p>	None

Step	Action [Corresponding Documentation]	Remarks and Subsequent Steps [Corresponding Documentation]
7	<p>Installation of the highest version of SAP NetWeaver Process Integration (PI) in a dedicated system and import of XI Content.</p> <p>For more installation and administration information, see the guides for SAP NetWeaver at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.</p> <p>Also, see the following:</p> <ul style="list-style-type: none"> • SAP Note 1515223  • SAP Note 836200  • SAP Note 1865292  • SAP Note 1574235  • SAP Note 1152640  • SAP Note 836200  	<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>
8	<p>Installation of SAP Business Warehouse (SAP 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 SAP BW. 3. Install BI Content on the AS-ABAP system. 	None
9	<p>Installation of SAP SCM Server 7.0</p> <p>For more installation information, see the guides for SAP SCM at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.</p>	Optional
10	<p>Installation of Frontend GUIs on every host from which you want to connect to your SAP CRM system</p> <p>For more installation information, see the installation guide for the SAP front end at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.</p>	None
11	<p>Configuration of your business scenario and processes as described in SAP Solution Manager</p> <p>Start the configuration only after you have installed all of the required software units.</p>	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 [1751237](#) 
- SAP Note [1563579](#) 



i Note

To ensure that you have the most current information about SAP product versions, including availability and end of maintenance dates, upgrade paths, and technical release information, see the SAP Product Availability Matrix at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.


4.5 Overall Upgrade Sequence

Use


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

- To upgrade from SAP CRM 5.2 or SAP CRM 2007 to the current release, you must use the Software Update Manager (SUM) tool. Ensure that you perform a dual stack split before upgrading. For more information about splitting SAP dual-stack systems based on SAP NetWeaver, see SAP Note [1655335](#)  and SAP Note [1797362](#) .
- To upgrade from SAP CRM 5.0 to the current release, you can use the tools mentioned above for most components. For some components, an upgrade is not possible; they must be migrated. This is due to the fact that as of SAP CRM 5.2, the people-centric UI (PC UI) is no longer supported, and the WebClient UI was introduced as the standard user interface. A technical upgrade to the new UI is not possible. For more information about migration, see [Migration from SAP CRM 5.0 to SAP CRM 7.0 EHP4 \[page 54\]](#). The business packages for SAP CRM 5.0 cannot be used in the current release because they only run on the PC UI.


You can upgrade all software units mentioned below in parallel. However, dependencies can exist between some of the subcomponents that belong to a larger software unit. For example, CRM Mobile Client Component consists of several subcomponents to which a specific upgrade sequence applies. These dependencies are explained in the corresponding component upgrade guides.

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



Procedure

Action		
Step	[Required Documentation]	Remark / Subsequent Step
1	Installation of SAP Solution Manager and implementation content.	For release and guide information, see the Solution Manager prerequisites in the Planning for Installation, Update, and Upgrade Processes [page 13] section.
2	Upgrade of Frontend GUIs For more installation information, see the installation guide for the SAP front end at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest .	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  .
3	Upgrade of CRM Application Server ABAP and CRM Application Server Java See the upgrade and update guides at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest .	None
4	Upgrade of SAP NetWeaver Search and Classification (TREX) to version 7.10. For more information about upgrading TREX, see the documentation at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest .	None
5	Installation of SAP NetWeaver liveCache For more information, see the guides for SAP NetWeaver at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest .	None
6	Update of Groupware Connector to version 7.50 For more information, see the Groupware Connector guides at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest .	None

Action		
Step	[Required Documentation]	Remark / Subsequent Step
7	Upgrade of SAP Business Warehouse (SAP BW) to version 7.50 For information about upgrading SAP BW, see the upgrade information at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest .	None
8	Upgrade of SAP SCM Server to version 7.3 For more upgrade and update information, see the guides for SAP SCM at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest .	Optional

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

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

- SAP Note [1751237](#) 
- SAP Note [1563579](#) 

i Note




To ensure that you have the most current information about SAP product versions, including availability and end of maintenance dates, upgrade paths, and technical release information, see the SAP Product Availability Matrix at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.

5 SAP HANA

5.1 Getting Started with SAP HANA

Related Information

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

Content	Location
Sizing, calculation of hardware requirements – such as CPU, disk and memory resource – with the Quick Sizer tool	https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest
Released platforms and technology-related topics such as maintenance strategies and language support	https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest To access the Platform Availability Matrix directly, enter https://support.sap.com/pam 
Network Security	https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest
High Availability	http://www.sdn.sap.com/irj/sdn/ha 
Performance	https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest
Information about Support Package Stacks, latest software versions and patch level requirements	https://support.sap.com/sp-stacks 

Content	Location
Information about Unicode technology	https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest http://www.sdn.sap.com/irj/sdn/i18n
Information on SAP HANA	http://help.sap.com/hana_platform

Further Useful Links




The following table lists further useful links:

Content	Location
SAP Notes search	http://support.sap.com/notes
SAP Software Distribution Center (software download and ordering of software)	http://support.sap.com/swdc
SAP Online Knowledge Products (OKPs) – role-specific learning maps	https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest
Additional information on SAP HANA	http://www.saphana.com/

Related Guides

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

Guide	Location
Installation Guide for SAP CRM	https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest
Upgrade and Update Guides for SAP CRM	https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest
Guides for SAP HANA	http://help.sap.com/hana_platform

Guide	Location
Software Update Manager (SUM) Guide	http://help.sap.com/sltoolset 
System Copy Option Guide	http://help.sap.com/sltoolset 
Split Option Guide	http://help.sap.com/sltoolset 
Software Provisioning Manager Guide	http://help.sap.com/sltoolset 


Important SAP Notes

You must read the SAP Notes about SAP HANA before you start the implementation (see [SAP Notes \[page 96\]](#)). These SAP Notes contain the most recent information on the implementation, as well as corrections to the implementation documentation.


5.2 Technical System Landscape with SAP HANA

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

i Note

You must consider that SAP NetWeaver AS JAVA 7.30 is based on JAVA EE 5, which might require additional migration effort for customer specific application development based on former JAVA EE versions. For more information, refer to the SDN Best Practice blog at <http://scn.sap.com/community/netweaver-portal/blog/2011/07/25/sap-netweaver-portal-73-top-10-lessons-learned-from-ramp-up-you-should-know-before-getting-started> .

i Note

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

Technical Usages

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

Technical Usage	Product Instance
CRM Application Server ABAP	CRM Application Server ABAP
XI/ESR Content	XI/ESR Content

Implementation Considerations

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

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

For a complete list of all technical usages available with this enhancement package for SAP CRM 7.0, see the preceding section for technical usages.

6 Migration from SAP CRM 5.0 to SAP CRM 7.0 EHP4

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

i Note

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

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

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

i Note

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

- See the release notes for SAP CRM 5.0 (see SAP Help Portal at <https://help.sap.com/crm>).
- See the functional enhancements and restrictions of the current release that are listed in this section.
- See the descriptions of the business functions that you can activate in SAP Library for SAP CRM on SAP Help Portal at <https://help.sap.com/crm>. Choose the release and then *Application Help*. In SAP Library, choose ► *Business Functions for SAP Customer Relationship Management* ►.

What Are the Main Upgrade Activities?

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

- Technical upgrade
- Application component upgrade
- Functional migration

How is the Migration Information Structured?

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

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

i Note

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

For more information about the browsers that support this release of SAP CRM, see SAP Note [1876371](#).

→ Recommendation

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

You can enter the memory threshold in Customizing for *Customer Relationship Management* under ► *UI Framework* ► *Technical Role Definition* ► *Define Technical Profile* ►.

6.1 Master Data

6.1.1 Accounts and Contacts

Enhancements

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

Function in SAP CRM 5.0	5.0 UI	Enhancement in This Release
Accounts	Not available	Introduction of a life cycle stage for the account; the fields on the user interface depend on the user's selection. <div><h4>❖ Example</h4><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>

Function in SAP CRM 5.0	5.0 UI	Enhancement in This Release
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> <p>Note</p> <p>Do not click the Generate button instead since this will produce syntax errors in generated coding.</p> </div>
UI enhancements	SAP GUI, PC UI	<p>Label positioning is possible using configuration.</p> <p>You can display and hide additional fields from a pool of fields of the business object.</p>

Restrictions

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

Function in SAP CRM 5.0	5.0 UI	Restriction in This Release
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 this release; 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 (BAdIs) for the

WebClient UI. You find these BAdIs in Customizing for *Customer Relationship Management* under ► *Master Data* ► *Business Partner* ► *Accounts and Contacts* ► *Business Add-Ins* ►.

SAP Notes

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

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



6.1.2 Products, Product Hierarchies, Objects, Partner and Product Ranges

Enhancements

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

Function in SAP CRM 5.0	5.0 UI	Enhancement in This Release
Maintenance transaction	SAP GUI	<p>As in PC UI, maintenance is split for the different types of products:</p> <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.

i Note

For more information about how to add new fields and set types, see SAP Library for SAP CRM on SAP Help Portal at <http://help.sap.com/crm-core>. Choose a release and then *Application Help*. In SAP Library, choose ► *Master Data* ► *Products* ► *Concepts* ► *Set Types and Attributes* ► *Definition of Set Types and Attributes* ► and *Creating UI Configuration for Set Types*.

Restrictions

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

Restrictions for Products

Function in SAP CRM 5.0	5.0 UI	Restriction in This Release
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 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.

Restrictions for Product Hierarchies

Function in SAP CRM 5.0	5.0 UI	Restriction in This Release
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.

Restrictions for Partner/Product Ranges

Function in SAP CRM 5.0	5.0 UI	Restriction in This Release
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 this release. The appropriate steps have to be performed for the object fact sheet. Additionally, the required fact sheet views need to be developed and assigned to this object fact sheet.

SAP Notes

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

Note Number	Short Description
1026475 	<p>UI layout</p> <ul style="list-style-type: none">In this release, only those relationships that are explicitly assigned to the categories are visible in the UI. In SAP GUI, combined screens exist. <div><p> Example</p><p>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 this release, such screens are displayed as two separate assignment blocks, which have to be assigned explicitly to the categories.</p></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.

6.1.3 Installed Bases

Restrictions

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

Function in SAP CRM 5.0	5.0 UI	Restriction in This Release
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

6.2 Sales

6.2.1 Sales Order Management, CRM Billing

Enhancements

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

Function in SAP CRM 5.0	5.0 UI	Enhancement in This Release
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 provides a comparison between SAP CRM 5.0 and the current release:

Function in SAP CRM 5.0	5.0 UI	Restriction in This Release
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
Commodity pricing	SAP GUI, PC UI	Not available

6.2.2 Opportunities, Listings, Territory Management, and Organizational Management

Restrictions

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

Function in SAP CRM 5.0	5.0 UI	Restriction in This Release
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. • Project integration with Product Lifecycle Management (PLM) in Collaboration Projects (cProjects)
Listings	SAP GUI, PC UI	<ul style="list-style-type: none"> • Listing reports: The function Save Search As 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 Employee field; this is now possible with the input help of the Position 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, a runtime error may occur. For more information, see SAP Note 1635858.

6.2.3 Account Planning

Enhancements

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

Function in SAP CRM 5.0	5.0 UI	Enhancement in This Release
Customizing	Not available	Action profile is assigned as default value in Customizing.
Customizing	Not available	Business warehouse 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 this release; this change is performed in the Planning Services infrastructure. However, the flex UI is only available as of SAP Business Warehouse (SAP BW) 7.0. This release of SAP CRM and the BI 3.5 UI are automatically switched to the current HTML control.

Restrictions

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

Function in SAP CRM 5.0	5.0 UI	Restriction in This Release
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> .

Function in SAP CRM 5.0	5.0 UI	Restriction in This Release
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.

6.2.4 Mobile Sales

Enhancements

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

Function in SAP CRM 5.0	5.0 UI	Enhancement in This Release
Quotation and order management	Mobile client	Additional Customizing is necessary.
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 provides a comparison between SAP CRM 5.0 and the current release:

Function in SAP CRM 5.0	5.0 UI	Restriction in This Release
Account planning	Mobile client	The account planning data persists only in SAP Business Warehouse (SAP BW); there is no data present on the CRM server. There is also no automatic conversion of previous account plans created in SAP CRM 5.0; these account plans are only usable by way of reporting.

6.3 Service

Enhancements

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

Function in SAP CRM 5.0	5.0 UI	Enhancement in This Release
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 this release compared to SAP CRM 5.0:

Migration Activities


Multilevel Categorization

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

- Cases
- Complaints
- Returns
- In-house repairs
- Service orders
- Service order quotations
- Service order templates
- Service confirmations
- Warranty claims
- Service request or incident
- Problem
- Request for change

A subject profile is then assigned to the categorization schema. When you create the different nodes of a hierarchy structure, the subject codes that are available within the subject profile that you have assigned to the schema need to be mapped to these nodes.

Caution

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

6.3.1 Complaints and Returns; In-House Repair Orders

Enhancements

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

Function in SAP CRM 5.0	5.0 UI	Enhancement in This Release
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)

6.3.2 Service Order Management and IT Service Management

Restrictions

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

Restrictions for Service Orders, Service Contracts, and Warranty Claim Processing

Function in SAP CRM 5.0	5.0 UI	Restriction in This Release
Item hierarchy tree	SAP GUI, PC UI	Not supported
Action monitor	SAP GUI	Only supported in SAP GUI

Restrictions for Service Orders and Service Contracts

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

Restrictions for Service Contracts

Function in SAP CRM 5.0	5.0 UI	Restriction in This Release
Service level agreement (SLA) profile administration	SAP GUI, PC UI	The administration transaction (CRMD_SERV_SLA) Maintain Availability and Response Times remains in SAP GUI.

6.3.3 Case Management

Enhancements

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

Function in SAP CRM 5.0	5.0 UI	Enhancement in This Release
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 provides a comparison between SAP CRM 5.0 and the current release:

Function in SAP CRM 5.0	5.0 UI	Restriction in This Release
Action monitor	SAP GUI	Only supported in SAP GUI

6.3.4 Mobile Service

Restrictions

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

Function in SAP CRM 5.0	5.0 UI	Restriction in This Release
Assignments	Mobile client	Available on the mobile client, but not supported in this release online
Multilevel categorization	Mobile client	Used in all service transactions in this release 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 \[page 65\]](#).

6.4 Marketing

6.4.1 Marketing Plans and Campaigns

Enhancements

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

Function in SAP CRM 5.0	5.0 UI	Enhancement in This Release
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 Start .
Enhancement spot CRM_MKTPL with several BAdIs	Not available	<p>Based on the introduction of a new object layer architecture, new BAdIs have been introduced:</p> <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 provides a comparison between SAP CRM 5.0 and the current release:

Function in SAP 5.0	5.0 UI	Restriction in This Release
BAdI CRM_MKTPL	SAP GUI, PC UI	<p>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.</p> <p>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.</p>

Function in SAP 5.0	5.0 UI	Restriction in This Release
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 called anymore; it has been replaced by BAdIs CRM_KFP_BADI and CRM_KFP_COMP_BADI.
SAP Business Warehouse (SAP BW) reports	SAP GUI, PC UI	SAP 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 Online 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).

Function in SAP 5.0	5.0 UI	Restriction in This Release
Search function	SAP GUI, PC UI	Search results do not include objects of the following types: campaign element, marketing plan element, and trade promotion element.

6.4.2 Segmentation

Migration Activities

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

❖ Example

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

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

6.4.3 External List Management

Migration Activities

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

If you want to continue to use certain functions in the current release, see SAP Note [976438](#).

6.4.4 Mail Forms

Restrictions

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

Function in SAP CRM 5.0	5.0 UI	Restriction in This Release
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.

6.4.5 Trade Promotion Management

Enhancements

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

Function in SAP CRM 5.0	5.0 UI	Enhancement in This Release
Customizing	SAP GUI	Status profile and action profile are assigned as default values in Customizing.
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 provides a comparison between SAP CRM 5.0 and the current release:

Function in SAP CRM 5.0	5.0 UI	Restriction in This Release
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 Online 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	<p>Creation of trade promotions or trade promotion elements below trade promotion elements is no longer possible.</p> <p>An existing marketing project cannot be assigned to another marketing project (only to a link in the parent field, but there is no Add button in the hierarchy).</p>
Segment partner function	SAP GUI, PC UI	The segment partner function is no longer available.

Function in SAP CRM 5.0	5.0 UI	Restriction in This Release
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.

6.5 Interaction Center

Enhancements

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

Function in SAP CRM 5.0	5.0 UI	Enhancement in This Release
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 <code>CRM_RULE_TRANS</code> 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.

Function in SAP CRM 5.0	5.0 UI	Enhancement in This Release
Intent-Driven Interaction (IDI)	Not available	<ul style="list-style-type: none"> • Intent-driven interaction guidance • Interaction modeling and evaluation
<div> <div>i Note</div> <div>The IDI is available as of SAP CRM 5.1.</div> </div>		
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 BAdI 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.

Function in SAP CRM 5.0	5.0 UI	Enhancement in This Release
Complaint/Sales Order/Lead	IC WebClient	Automatic dialog boxes can be configured for organizational unit selection and partner selection

Restrictions

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

Function in SAP CRM 5.0	5.0 UI	Restriction in This Release
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 this release.

Custom Views and Controllers

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

Standard Responses

Recreate all standard responses with the new editor.

Alerts

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

Launch Transaction

Regenerate launch transaction in transaction `CRMC_UI_ACTIONWZ`.

Activity Clipboard

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

Navigation Bar

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

IC Profile

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

Account Identification

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

6.6 Partner Channel Management

Enhancements

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

Function in SAP CRM 5.0	5.0 UI	Enhancement in This Release
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 <code>PRCONT</code> – <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.

Function in SAP CRM 5.0	5.0 UI	Enhancement in This Release
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 Channel Partner role	Not available	The Company Contacts application has been extended in such a way that information can be maintained.

New Authorization Object to Control Business Partner Roles

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

Rule-Based Employee Assignment

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

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

Restrictions

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

Function in SAP CRM 5.0	5.0 UI	Restriction in This Release
Partner Employee role	PC UI	The Partner Employee role is not available; the My Profile 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 this release, the following activity transaction types are available:

- *SCCP Partner Report*
- *SCPO Channel Report*

Request to Brand Owner

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

Changed Request for Qualification

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

Transaction type CHM2 is now obsolete.

New Partner Contact Role

In SAP CRM 5.2, the new business partner role PRCONT – *Partner Contact* was introduced. This role allows you to improve separating employees of channel partners from other contacts. The applications *Partner Contacts* (for the channel manager) and *Company Contacts* (for the partner manager) filter on this business role.

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_BUFA_UPD of the BAdI PARTNER_UPDATE.

User Assignment in Channel Manager Role

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

User Assignment in Partner Role

In addition to the Web Channel user management application, the *Company Contacts* application now contains an assignment block that allows you to maintain user data.

Changed User Management for External Users

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

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

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





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

Obsolete Customizing Settings

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

SAP Notes


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

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


6.7 Cross-Application Components

6.7.1 Fact Sheet

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

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

6.7.2 Groupware Integration

You can migrate from the Java-based MapBox used in SAP CRM 5.0 to the ABAP-based MapBox used in the current release. For more information about the migration, see SAP Library for SAP CRM on SAP Help Portal at <http://help.sap.com/crm-core> . Choose a release and then *Application Help*. In SAP Library, choose ► *Data Exchange and Mobile Technologies* ► *Groupware Integration* ► *Server-Based Groupware Integration* ► *Migration of Groupware Integration Data to the ABAP MapBox* ►.

6.7.3 MS Office Integration

If you have created your own templates in SAP CRM 5.0, you can adapt these templates in the current release. The data for the templates is provided by a Web service that reads the data from a back-end and not from the

user's screen. To use MS Office Integration in the current release of SAP CRM 7.0, you need supported versions of Microsoft software. For more information about the MS Office Integration, see SAP Library for SAP CRM on SAP Help Portal at <http://help.sap.com/crm-core>. Choose a release and then *Application Help*. In SAP Library, choose ► *Basic Functions* ► *Template Designer* ►

6.7.4 Web Services

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

For more information about the Web services tool, see SAP Library for SAP CRM on SAP Help Portal at <http://help.sap.com/crm-core>. Choose a release and then *Application Help*. In SAP Library, choose ► *Basic Functions* ► *Web Services* ►.

6.7.5 Portal Integration

In the current release, the WebClient UI is integrated into SAP NetWeaver Portal. You can run this release with all features in the portal. Every CRM application is displayed in one portal page. You can easily create portal content by using the role upload tool.

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

i Note

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

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

- Customizing for SAP CRM under ► [Customer Relationship Management](#) ► [UI Framework](#) ► [Portal Integration](#) ► [Overview](#) ►
- SAP Library for SAP CRM on SAP Help Portal at <http://help.sap.com/crm-core> ►. Choose a release and then [Application Help](#). In SAP Library, choose ► [WebClient UI Framework](#) ► [Portal Integration](#) ►.

⚠ Caution

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

6.7.6 Workflow Inbox

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

Enhancements

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

Function in SAP CRM 5.0	5.0 UI	Enhancement in This Release
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 SAP CRM under ► Customer Relationship Management ► Basic Functions ► Worklist ► Define Alert Inbox and Workflow Inbox ► Integrate Other SAP Systems in Workflow Inbox ► and BAId: Integrate Other SAP Systems in Workflow Inbox.</p>

Restrictions

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

Function in SAP CRM 5.0	5.0 UI	Restriction in This Release
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 this release, you can use an alternative version of the CRM WebClient UI based workflow inbox within the SAP CRM Worklist. This alternative version provides filter capabilities like usual search pages in the CRM WebClient UI that follow the advanced search pages UI concept.

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

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

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

Workflows for Objects

In this release, you can view the tasks of workflows that are related to a business object. You can view these workflow tasks in a CRM WebClient UI assignment block within the overview page of the business object if you

have implemented an integration of the UI block into the overview page. For more information, see SAP Note [1717812](#).

Function in SAP CRM 5.0	5.0 UI	Enhancement in This Release
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

6.7.7 SAP Jam Integration

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

Enhancements

Function in SAP CRM 5.0	5.0 UI	Enhancement in This Release
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• Service order• Service request or incident• Marketing plan• Marketing campaign• Segmentation model

Function in SAP CRM 5.0	5.0 UI	Enhancement in This Release
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

Creation of a Campaign and Target Group from an External System

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

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

Enhancements

Function in SAP CRM 5.0	5.0 UI	Enhancement in This Release
Create new campaign and new SAP Jam group	Not available	<p>The RFC service creates the following objects:</p> <ul style="list-style-type: none"> • A CRM target group containing marketing prospects from a list of external users • A new campaign that has the target group assigned • An SAP Jam group that contains links to the target group and the campaign in CRM
Create new campaign	Not available	<p>The RFC service creates the following objects:</p> <ul style="list-style-type: none"> • A CRM target group containing marketing prospects from a list of external users • A new campaign that has the target group assigned

Function in SAP CRM 5.0	5.0 UI	Enhancement in This Release
Create new campaign and reuse an existing SAP Jam group	Not available	<p>The RFC service creates the following objects:</p> <ul style="list-style-type: none"> • A CRM target group containing marketing prospects from a list of external users • A new campaign that has the target group assigned <p>An existing SAP Jam group can be reused if it was created by an earlier call of the same service</p>
Create new target group and assign it to an existing campaign	Not available	<p>The RFC service creates a CRM target group containing marketing prospects from a list of external users. If the campaign was created by an earlier call of the same service, the system assigns the target group to an existing CRM campaign.</p>

7 Solution-Wide Topics

7.1 Integration of SAP BusinessObjects

Use

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

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

Embedded Analytics contains the following integrations:

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

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

Technical Requirements

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

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

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

More Information

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

Topic	Information Source
General Information	<p>SAP Library for SAP ERP or SAP Library for SAP Customer Relationship Management on SAP Help Portal at http://help.sap.com/erp607 or http://help.sap.com/crm</p> <p>In SAP Library, choose ► <i>Processes and Tools for Enterprise Applications</i> ► <i>Embedded Analytics</i> ►.</p>
Installation Information	<p>SAP Help Portal at http://help.sap.com ► <i>Analytics</i> ► <i>All Products</i> ►</p>
Configuration Information	<p>SAP Solution Manager under ► <i>Solutions/Applications</i> ► <i>Basic Configuration</i> ► <i>Embedded Analytics</i> ►</p>
Installation Instructions	<p>SAP Notes 1353044 (Crystal Reports Viewer for Business Suite Applications 1.0) and 1345320 (Crystal Reports with Queries)</p>

7.2 Service-Oriented Architecture (SOA)

7.2.1 Introduction

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

7.2.2 Service Enablement

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

- SAP Business Suite 7**
 Enterprise services are an integral part of the software components of the SAP Business Suite applications. Enterprise services are the technical interfaces to the functionality available in the business application.
- SAP NetWeaver PI 7.0 or higher**
 SAP NetWeaver Process Integration (SAP NetWeaver PI) is an open integration and application platform that provides tools enabling you to set up a service-oriented architecture for business applications. You can use the platform for providing, discovering, and consuming services, integrating applications using the

integration server, and managing business processes. Process integration is required in a runtime environment to consume enterprise services in a mediated scenario.

We recommend that you use the highest version of SAP NetWeaver Process Integration (PI). For more information, see SAP Note [1515223](#) and SAP Note [1388258](#).

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, enter the phrase *Advanced Adapter Engine Extended* in the documentation of SAP NetWeaver Process Integration at <http://help.sap.com/nw73> and see 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.

i Note

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

- **Services Registry**

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

- **SAP NetWeaver CE 7.1 or higher**

The SAP NetWeaver Composition Environment (SAP NetWeaver CE) provides a robust environment for the design and implementation of composite applications.

The design time environment of SAP NetWeaver CE can be used for the model-driven design and development of composite applications based on enterprise services. SAP NetWeaver CE offers the tools and the environment necessary for running composite applications fast and efficiently in a runtime environment.

7.2.3 Installation of the Service-Oriented Architecture (SOA)

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

- **Identification of software components and required business functions**
You use the technical data section of the enterprise service documentation to identify the following data for each enterprise service:
 - the software component version with which the service was shipped
 - the business function(s) required to be activated
- **Identification of technical usages** (relevant for SAP ERP only)
SAP Note [1818596](#) provides a mapping of business functions and software component versions to technical usages. You use this documentation to identify the required technical usages for your list of software component versions and business functions.
- **Installation of the software component ECC-SE** (relevant for SAP ERP only)
The software component ECC-SE contains service implementations for ECC (the ERP Central Component). This component must be explicitly installed if you intend to use enterprise services for ECC functionality. In this case you must also select the technical usage "ESA ECC-SE" during the enhancement package installation.
- **Selection and installation together with the other parts of the enhancement package**
In the enhancement package installation process you must select all the technical usages you have identified for service enablement together with the technical usages you identified for enhanced features in SAP Business Suite. The selected technical usages will install the corresponding software components that contain the enterprise services interfaces and implementations.
- **Import of ESR Content (aka XI Content)** (optional)
To install the content required for the enterprise service definitions you must select the technical usage "XI Content" in the enhancement package installation process. This usage type downloads the content files for SAP NetWeaver PI 7.0 or higher. Unpack the ZIP file and copy the tpz files corresponding to your SAP NetWeaver PI version into the import directory of your Integration Repository (for SAP NetWeaver PI 7.0x) or Enterprise Services Repository (for SAP NetWeaver ES Repository 7.1 or higher). Use the import function to import the content files into the corresponding repository (Integration Repository or Enterprise Services Repository). (Choose **Tools** > **Import Design Objects**)
- **Services Registry** (optional)
The services registry is shipped starting with SAP NetWeaver PI 7.1 and CE 7.1. You must configure the services registry and then publish the enterprise services from the Business Suite application to the registry using the transaction `SOAMANAGER` in the backend.
For further information regarding the SAP NetWeaver PI, CE and ES Repository, refer to the corresponding SAP NetWeaver Installation and Master Guides.

7.2.4 Related Documentation

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

- SCN Community in the SAP Network at <https://scn.sap.com/community/soa> (registration required)
- SAP Note [1359215](#): Technical prerequisites for using enterprise services (relevant for *ERP* only)
- SAP note [838402](#): Problems with non-Unicode system landscapes

7.3 Developing and Modifying Applications: SAP NetWeaver Development Infrastructure

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

Local Installation

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

Central Infrastructure

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

For more information about 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 <http://help.sap.com/netweaver>

 [SAP NetWeaver <release>](#)  [Installation and Upgrade Information](#) .

For more information about working with the development infrastructure, see the SAP Help Portal at <http://help.sap.com/netweaver>  [SAP NetWeaver <release>](#)  [Development Information](#)  [Developer's Guides](#) .

For more information about modifying and extending SAP CRM Java components, see the *SAP E-Commerce 7.54 Development and Extension Guide* and the corresponding tutorial available at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.

7.4 Customizing Scout

Use

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

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

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

More Information

<http://support.sap.com/solutionmanager> 

7.5 Application Enhancement Tool

Use

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

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

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 <http://help.sap.com/crm> > <choose release> > *Application Help* > *WebClient UI Framework* > *Application Enhancement Tool*.

7.6 Easy Enhancement Workbench

Use

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

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

Features

Easy Enhancement Workbench includes the following features:

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

The following extensions are possible for the Business Partner object:

- Support of new tables with 1:1 and 1:n relation to Business Partner main table
- Enhanced user interface definitions by optional use of Visual Configuration Tool

Easy Enhancement Workbench offers the following benefits:

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

More Information

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

7.7 Monitoring the System Landscape















To monitor your system landscape, use the SAP NetWeaver monitoring infrastructure. After you have installed all required components, configure the monitoring. For more information, see the guides required for operating your SAP NetWeaver system at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.


















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 at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.
















A Appendix















A.1 SAP Notes

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

Area	SAP Note Number	Description
General	337623 	Customizing after installation or upgrade
General	1613657 	Changes that you must take into account when you upgrade to avoid syntax errors and runtime errors.
General	837413 	Support Package levels for CRM installations/ upgrades
General	1648480 	Information on maintenance of SAP Business Suite 7
General	1388258 	Version Interoperability within the SAP Business Suite
General	1000822 	Overview: Notes for the Add-ons BI_CONT and BI_CONT_XT
General	1874939 	SAP Business Suite for SAP NetWeaver 7.4 Hub Systems
General	2254192 	Browser Compatibility of SAP CRM 7.0 EhP4
CRM Interactive Reporting	1110780 	FAQ for CRM Interactive Reporting
CRM Interactive Reporting	1401472 	Setting up BI reporting along with Interactive reporting
Cross-component	2171335 	EHP4 for SAP CRM 7.0 SP stacks – Release Information & Information Note
Cross-component	1371027 	Delivery of TERM and GLOSSARY Texts in SAP_BASIS 7x Products
Cross-component	2168082 	EHP4 for SAP CRM 7.0: Compatible Add-ons
Cross-component	1791023 	Additional Checks in Landscape Verification Wizard



Area	SAP Note Number	Description
Internet Pricing and Configurator	854170 	Switching on component VM Container
Migration	1037748 	Enhancing the CRM WebClient UI for business transactions
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	976438 	Migration of existing 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
Migration	837413 	Support Package Levels for CRM Installations/Upgrades
Migration	789220 	Support Package Levels for SAP NetWeaver Installations/Upgrades
Migration	1430101 	Subject Codes Not Available on Web-UI in Service Order
Migration	1563579 	Central Release Note for Software Logistics Toolset
Migration	2197259 	Additional Information About the Update/Upgrade to SAP NetWeaver 7.5 (Including SPs and SRs)
Migration	1620472 	Information on different results over time in stack XML calculation
Partner Channel Management	1138855 	Partner Channel Management Authorization Roles

Area	SAP Note Number	Description
Partner Channel Management	1111654 	Partner Channel Management Upgrade from CRM 5.0
Partner Channel Management	1119251 	Partner Channel Management Upgrade: New BP role PRCONT
Partner Channel Management	1119661 	Partner Channel Management Upgrade: Regenerate PDF
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.
Portfolio and Project Management	2026407 	FAQs - SAP Portfolio and Project Management 6.1
Portfolio and Project Management	2026050 	PPM 6.1: Support package information, notes, and schedule
Portfolio and Project Management	2034468 	Additional information for installation/upgrade of CPRXRPM 610_740
Portfolio and Project Management	2034467 	Support Packages for CPRXRPM 610_740
SAP Organizational Management CRM	1635858 	Multiple implementations under BAdI HRALE00INBOUND_IDOC in CRM system - SINGLE_EXIT_MULTIPLY_ACTIVE
SAP GUI	147519 	Maintenance strategy / deadlines 'SAP GUI'
SAP HANA	1514967 	Essential information about SAP HANA
SAP HANA	1514966 	Sizing information about SAP HANA.
SAP HANA	1681092 	System landscape and deployment configuration planning for SAP HANA
SAP HANA	855534 	Important information about the use of dual-stack system deployment for SAP Business Suite 7

Area	SAP Note Number	Description
SAP HANA	1797362 	Important information about corrections to documentation about dual-stack split for SAP systems
SAP HANA	1655335 	Recommendations for using the dual-stack split tool
SAP HANA	2171335 	Information about applying the support package (SP) stack for SAP CRM
SAP HANA	1785057 	Information about preparatory steps for database migration to SAP HANA
SAP HANA	1051576 	Information about conversion to Unicode (including references to additional notes describing the conversion to Unicode from ambiguous blended code page systems)
SAP HANA	1788581 	Information about transparent tables after migration to SAP HANA
SAP HANA	1798895 	Information about manual corrections for SAP HANA objects
SAP NetWeaver	1040325 	HTTP load balancing: Message Server or Web Dispatcher?
SAP Business Warehouse (SAP BW)	153967 	BI Content Release Strategy
Segmentation	1565886 	Missing number ranges in segmentation after upgrade
System Landscape Directory	669669 	Updating the SAP Component Repository in the System Landscape Directory (SLD)
Workforce Deployment	1246105 	CRM 7.0 Resource Planning and LiveCache component
Workforce Deployment	830595 	Installing WFMCORE 200
Workforce Deployment	836414 	Installing LCAPPS 2005_700

A.2 Related Information

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

Content	Location
Latest versions of installation guides for SAP CRM	https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest
Sizing guidelines	https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest
Information about released platforms and technology-related topics (for example, maintenance strategies, language support)	https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest To access the Product Availability Matrix directly, enter http://support.sap.com/pam 
Information about network security	https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest
Guide finder for technical documentation in SAP NetWeaver	http://help.sap.com/nw  SAP Netweaver <choose release> > <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 at https://help.sap.com/viewer/product/SAP_CUSTOMER_RELATIONSHIP_MANAGEMENT/7.0.4.latest.


A.4 Accessing SAP Library

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

- SAP Help Portal at <http://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 Help Portal, 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:

Tools for Supporting Installations and Upgrades

Tool	Purpose
Solution Manager System Landscape (transaction <code>SMSY</code>)	To model and set up your system landscape
SAP Solution Manager Maintenance Optimizer (transaction <code>DSWP</code>)	To install support packages and SAP enhancement packages
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, SPS 23 or higher
- SAP Solution Manager 7.1, SPS 05 or higher

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









For more information, see <https://support.sap.com/en/alm/solution-manager.html>.

SAP Solution Manager: Implementation Content

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

Landscape Verification for SAP Solutions Manager

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

For more information about the landscape verification add-on, see SDN at <http://www.sdn.sap.com/irj/sdn>   *Application Lifecycle Management*  *Technical Enablement*  *Update and Upgrade*  *Related Areas on Upgrade and Update Management*  *Landscape Verification*  (<http://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 Help Portal at <https://help.sap.com/viewer/index>. The guide also provides you with more information about the following:

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

A.5.1 Business Process Repository (BPR) Viewer

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

- Description of the business scenario, process, or implementable step
- Configuration content (Customizing activities or configuration documentation)

A.5.2 Using the BPR Viewer

Calling Up the BPR Viewer

You can call up the BPR viewer directly using the Internet address <https://implementationcontent.sap.com/bpr>. You can see more background information about the BPR viewer and additional material on the SAP Help Portal at <https://help.sap.com/viewer/index>.

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:

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.

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