SAP CRM

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About the Tutorial

SAP Customer Relationship Management (SAP CRM) is key component of SAP Business Suite and it is used not only to address an organization's short term goals, but it also helps in reducing cost and increase the decision making ability by defining future strategy. SAP CRM also helps in achieving differentiated capabilities to compete effectively and to meet long term objectives.

This is a fundamental tutorial that covers the basics of SAP CRM and how to deal with its various components and sub-components.

Audience

This tutorial has been prepared for those professionals who wish to learn the basics as well as the refinements of SAP CRM and execute it in practice.

The SAP CRM system is used to support all customer focused business areas like service, marketing, sales, etc. It is also implemented for different customer interaction channels, such as Interaction Centers, Internet, and mobile for E-Commerce.

This tutorial is planned to make the reader at ease in getting started with the SAP Customer Relationship Management and its several other utilities.

Prerequisites

It is an uncomplicated and simple tutorial which the readers can easily understand. The conceptions are explained here with a basic knowledge of how a company or an organization deals with its CRM System. However, it will help if you have some prior exposure to customer service, assistance related to sales, complaint handling and other related activities.

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1. SAP CRM – Introduction

SAP CRM is one of the key modules in an organization which deals with handling customers effectively and efficiently. In today's competitive market environment, it is necessary that companies make changes in a dynamic environment and take care of all the key activities related to customer service.

SAP Customer Relationship Management is known as integrated customer relationship management module by SAP that helps any organization to achieve their business goals and allows them to perform all Customer Relationship tasks efficiently. CRM is one of the key components for making business strategy for medium and large scale organizations and it also helps in understanding the customers, their needs and customer service effectively.

SAP CRM is part of SAP ERP (Enterprise Resource Planning) business suite and is used to implement customize business processes related to Customer Relationship management CRM and to integrate with SAP and non–SAP systems. SAP CRM allows an organization to achieve customer satisfaction by meeting the service expectation and providing products required by customers.

SAP CRM – Overview

SAP Customer Relationship Management (SAP CRM) is key component of SAP Business Suite and it is used not only to address an organization's short term goals, but also helps in reducing cost and increasing decision making ability by defining future strategy. It also supports in achieving differentiated capabilities to compete effectively to meet long term objectives.

SAP CRM includes the following sub modules that support key functions of the Customer Relationship Management:

- SAP CRM Sales
- SAM CRM Marketing
- SAP CRM Analytics
- SAP CRM Service
- SAP CRM Web Channel (E Marketing, CRM Mobile, etc.)
- SAP CRM Interaction Center IC
- SAP Hybris

SAP CRM provides you with several benefits, some of which are:

- It allows you to use cross-industry and industry-specific end-to-end business processes.
- You can use flexible and process-based deployment options.

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- It provides you an open adaptable technology platform powered by SAP NetWeaver.

Note: *With the acquisition of Hybris, SAP CRM Web Channel is no longer in use. All the companies that has CRM Web Channel WCEM license that is valid till Dec 2020 and SAP recommends to use SAP Hybris to manage E-Commerce and Marketing needs.*

Features of SAP CRM

SAP CRM is one of the key component of SAP Business Suite to manage customer relationship related activities. It is used to support all customer focused business areas like service, marketing, sales, etc.

This SAP CRM is implemented for different customer interaction channels, such as Interaction Centre, Internet, and mobile for E-Commerce.

It has one component known as CRM Analytics that allows an organization to analyze all the information related to ley tasks associated with customer management and use this analytical information for decision making and defining future strategy by providing customers the products that they need, quality of service, assistance in sales related activities, complaint handling etc.

CRM Version History

- SAP CRM 2008 (7.0) released in 2009 as part of SAP Business Suite 7.0.
- SAP CRM 2007 (6.0) released in 2007.
- SAP CRM 2006 (5.0) released in 2005.

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2. SAP CRM – Architecture

SAP CRM consists of various components that allow you to integrate the CRM module with other SAP and non-SAP modules, internet, mobile devices like smartphones, tablets, and enterprise portal.

In the center, it has SAP CRM server which has sub components like:

- CRM Enterprise Functions
- CRM Middleware

Then there are adapters to communicate with hand held devices and internet. The SAP ECC/R3 system is used for backend, SAP BI system is used for analytical reporting and SAP SCM is used to enhance the capabilities of SAP CRM module.

You can also see the SAP CRM architecture and all its listed key components in the following image:

- SAP ERM Server (CRM Enterprise, CRM Middleware, Adapter)
- SAP ECC as backend system
- SAP BI for Analytical Reporting
- SAP SCM
- Mobile and hand held devices
- Internet
- Enterprise Portal

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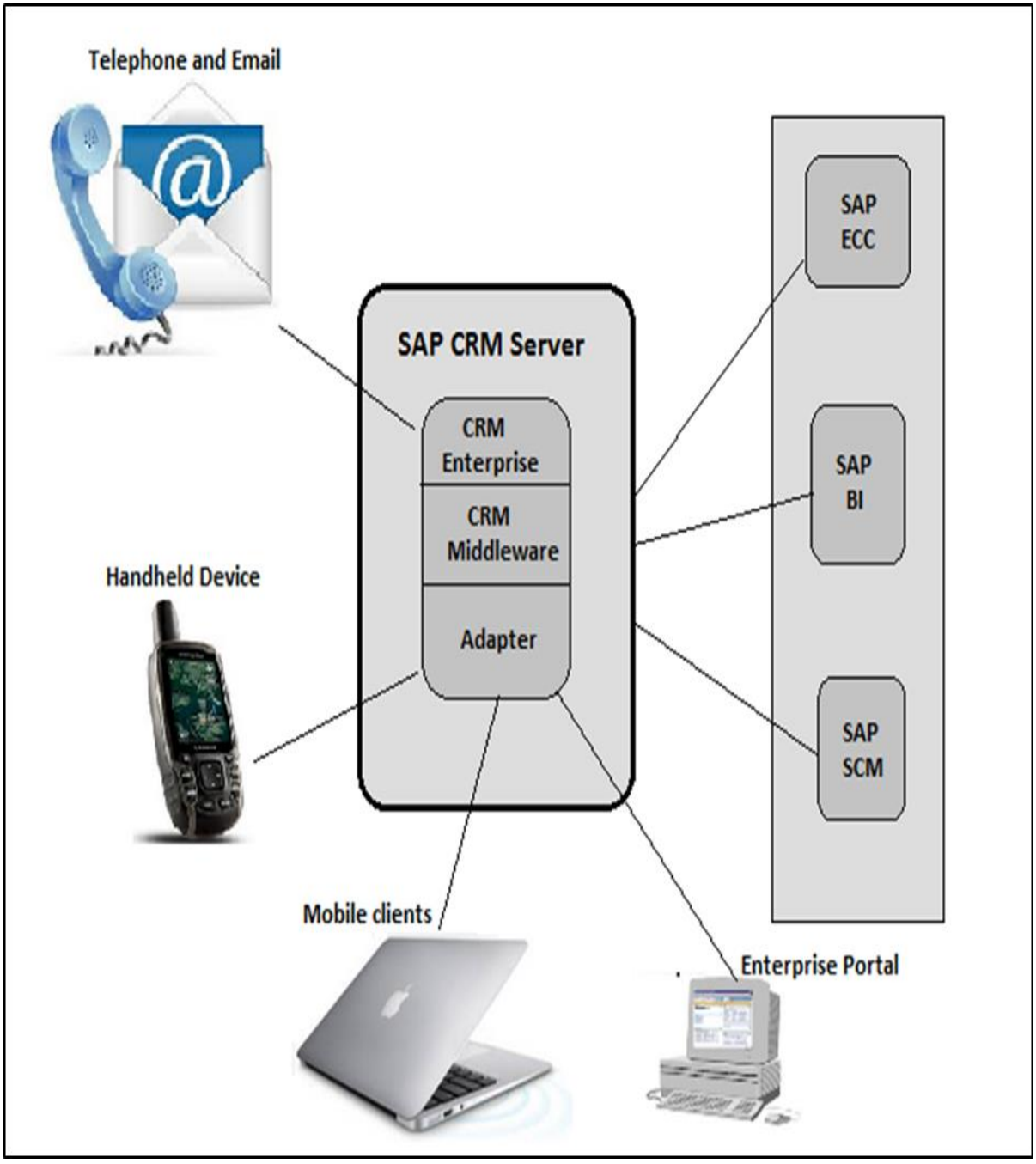

Installable Components of SAP CRM

There are various components that get installed with SAP CRM and provide a large set of functionalities to manage customer relationship.

- **CRM Core:** This includes the components that are mandatory for CRM system landscape, which includes:
-
    - CRM Application Server ABAP
    - CRM Application Server Java
    - SAP GUI and

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- **CRM** Web Client UI.
- **CRM Mobile Components:** This component is used for a mobile system landscape.
- **CRM Handheld Integration:** This component is used for CRM handheld integration.

Workforce Development

Standalone Components: These components are used to provide additional functionalities. They are optional components shown at the time of installation.

Application System: This contains OLTP backend system, BI in NetWeaver, SAP SCM and SAP SRM server.

SAP Solution Manager: This is one of the key components for SAP CRM implementation.

Content Types

Different content types are available for different components. For example: Content for System landscape directory.

The installation program **SAPinst** can install the CRM Application Server ABAP, CRM Application Server Java and the underlying SAP NetWeaver Application Server in a single installation run. CRM Application Server ABAP and CRM Application Server Java can run in one system using the same database.

You can also install the CRM Application Server ABAP and CRM Application Server Java in separate systems.

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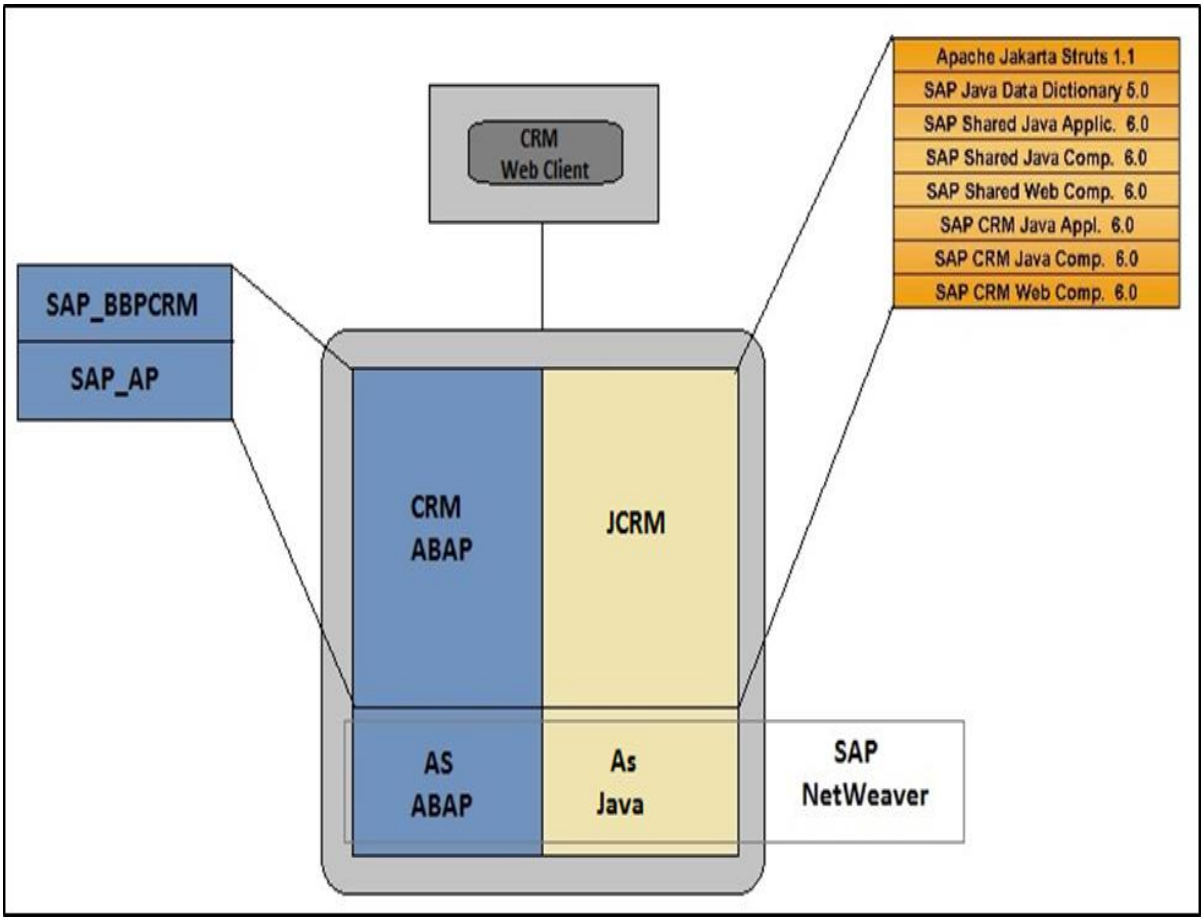

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3. SAP CRM – Capabilities

The SAP CRM components provide different capabilities. SAP CRM is a complete software suite and is part of the SAP Business software.

CRM Core

The core functions in SAP CRM are provided by CRM Application server ABAP and CRM Application server Java. You can further enhance the core functions by adding other software units. CRM Application server and Java application server enables you operate large range of business processes.

To enhance the capabilities, you can add other software like CRM Mobile application to enable use of marketing, sales and service functionalities in offline mode or use of Business Intelligence SAP NetWeaver for analytical reporting.

The SAP CRM Application server ABAP consists of the following components:

- SAP CRM ABAP 6.0
- SAP AP 7.00
- SAP WEB AS 7.00 (SAP NetWeaver 7.0 Application Server ABAP)
- SAP CRM UIF 6.0

SAP CRM Application Server Java consists of the following components:

- SAP JAVA data dictionary 5.0
- CRM IPC Mobile 6.0
- CRM IPC MOBILE 6.0
- CRM JAVA APPLICATIONS 6.0
- CRM JAVA COMPONENTS 6.0
- CRM JAVA WEB COMPONENTS 6.0
- SAP SHARED JAVA APPLIC. 6.0
- SAP SHARED JAVA COMPONENTS 6.0
- SAP SHARED WEB COMPONENTS 6.0
- TEALEAF 4.5 (Optional)

The SAP NetWeaver Application Server Java consists of the following component:

- SAP WEB AS 7.00

You can easily differentiate between CRM core Java components and CRM core non Java components. For a few business processes, you don't need CRM Application server Java components as they can run on Application Server ABAP components.

You should have SAP Core with CRM Java Components (JCRM) for the following business scenarios in SAP CRM:

CRM Web Channel WCEM: Business scenarios in which you want to use the product configuration. For example: the business process Sales Order Processing in CRM.

User Interfaces: The CRM web client is an integrated, clearly arranged web based user interface. You can perform the following functions in the user interface:

- Clearly arranged page layout
- Flexible and easy-to-use interface configuration
- Toolbar for functions
- Terminology that is suited to the new user interface
- Simple and intuitive navigation
- Easy-to-use personalization
- Enhanced search concept
- Access online help and tutorials

CRM Web Client is based on a web browser, so you would need to install a web browser on the client side. The CRM Web Client is fully based on the CRM Application Server ABAP using Business Server Page (BSP) technology. On the server side, the CRM Web Client is based on a multilayer architecture:

- Presentation Layer
- Business Object Layer
- At the top CRM Web Client UI

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4. SAP CRM – Integration with SAP SD

The SAP ECC and CRM are closely integrated with each other and they have to be synchronized in some configurational areas like Sales, Customer master records, Organizational model, etc.

Example: An organization model defines the sales area you should use in CRM and check in SAP ECC system. Sales area contains the following components:

- Sales Organization
- Distribution channel
- Divisions

You download the data from sales area to ECC system and this is performed when you configure the CRM module. You need to verify the configurational data in ECC before setting up in the CRM.

Maintaining Divisions in CRM

You can select if you want to work with divisions in SAP CRM. When you are using CRM with ECC, there is a need to maintain a dummy division or you can also use a header division in CRM so that dummy division for data transfer is not required.

Go to CRM -> Master Data -> Organizational Management -> Division Settings -> Define Use of Division and Dummy Division.

If you don't want to define a division in CRM, you can select the check box – "Division not act". In this case, you would need to enter a dummy division. The division that you enter in this window should be available in the ECC system.

To use this division at header level in business transactions in CRM, you can select the indicator- "Header Div Act".

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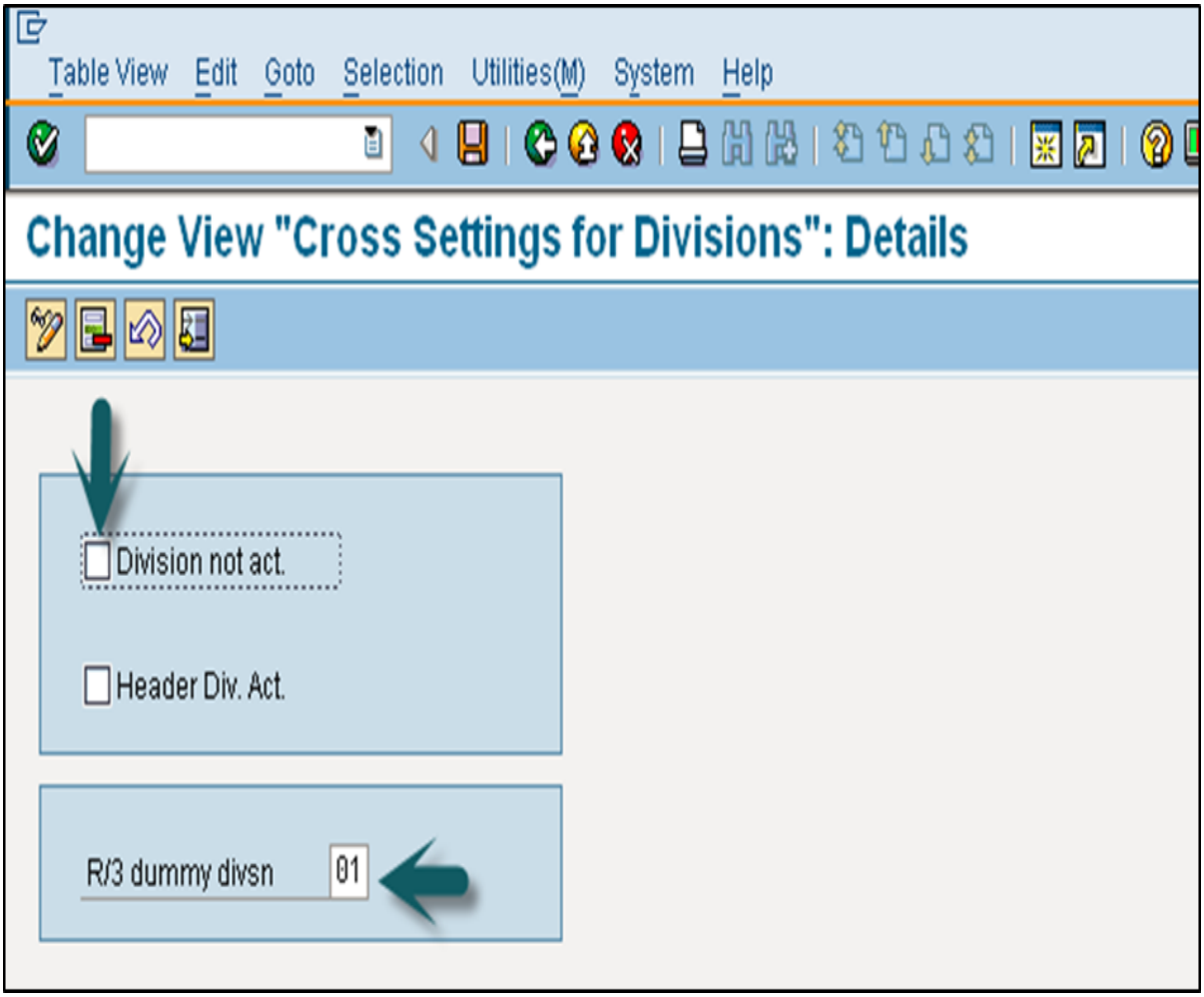

Define Divisions and Distribution Channels for CRM

You can also define divisions for CRM in addition to divisions copied from the ECC system. If your CRM system is standalone, then divisions are maintained manually.

To define division in CRM, go to **CRM -> Master Data -> Organizational Management -> Division Settings -> Define Divisions.**

In a similar way, you can define distribution channels in Organizational Management as well.

Go to **CRM -> Master Data -> Organizational Management -> Organizational Data for Sales Scenarios -> Define Distribution Channels.**

Define Combination of Distribution Channels and Divisions

You can also define combinations of distribution channels and divisions that can be assigned as attributes to the sales organization to define a sales area.

To define a combination of division and distribution channel, go to **CRM -> Master Data -> Organizational Management -> Organizational Data for Sales Scenarios -> Define Combination of Distribution Channel and Division**

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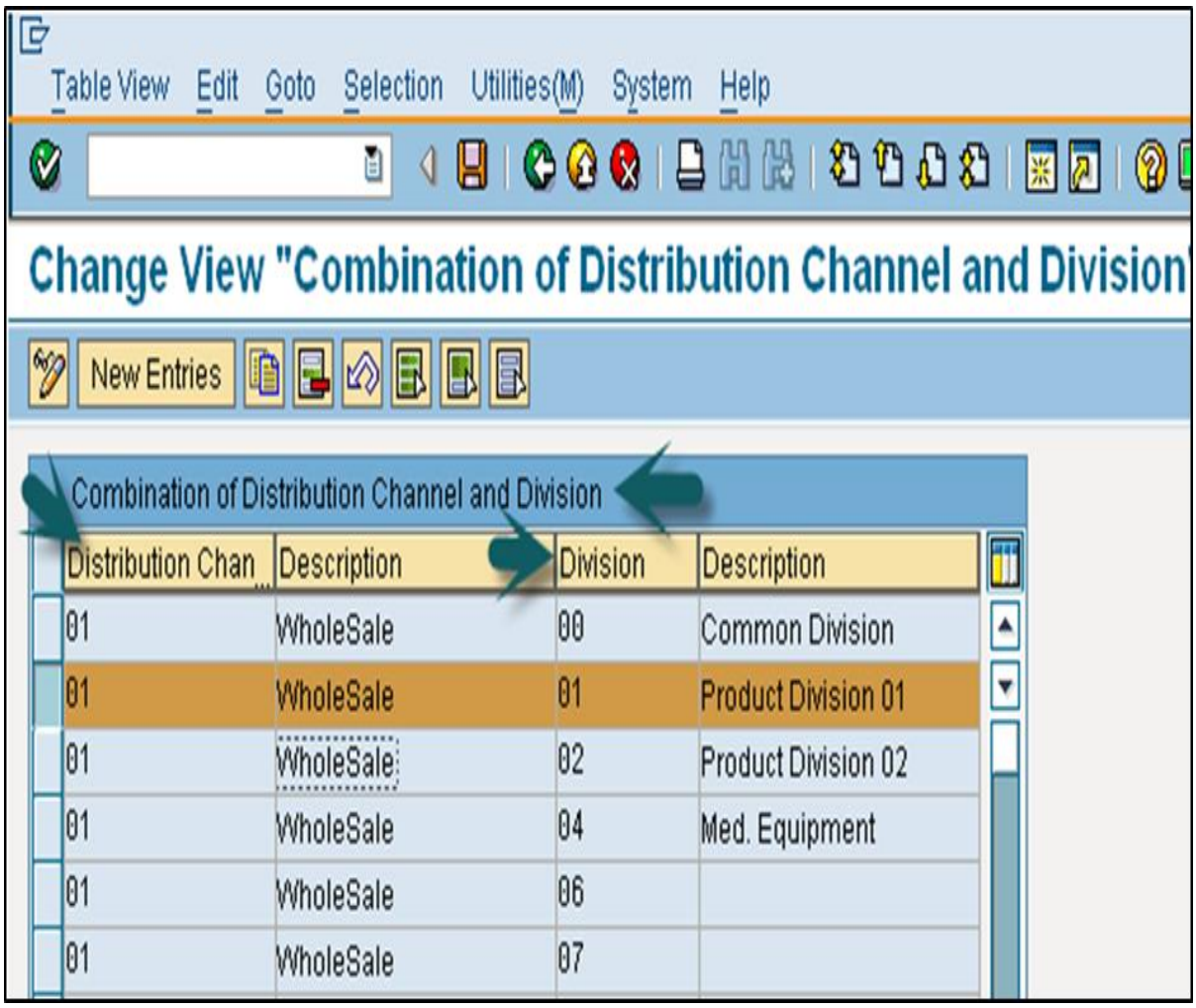

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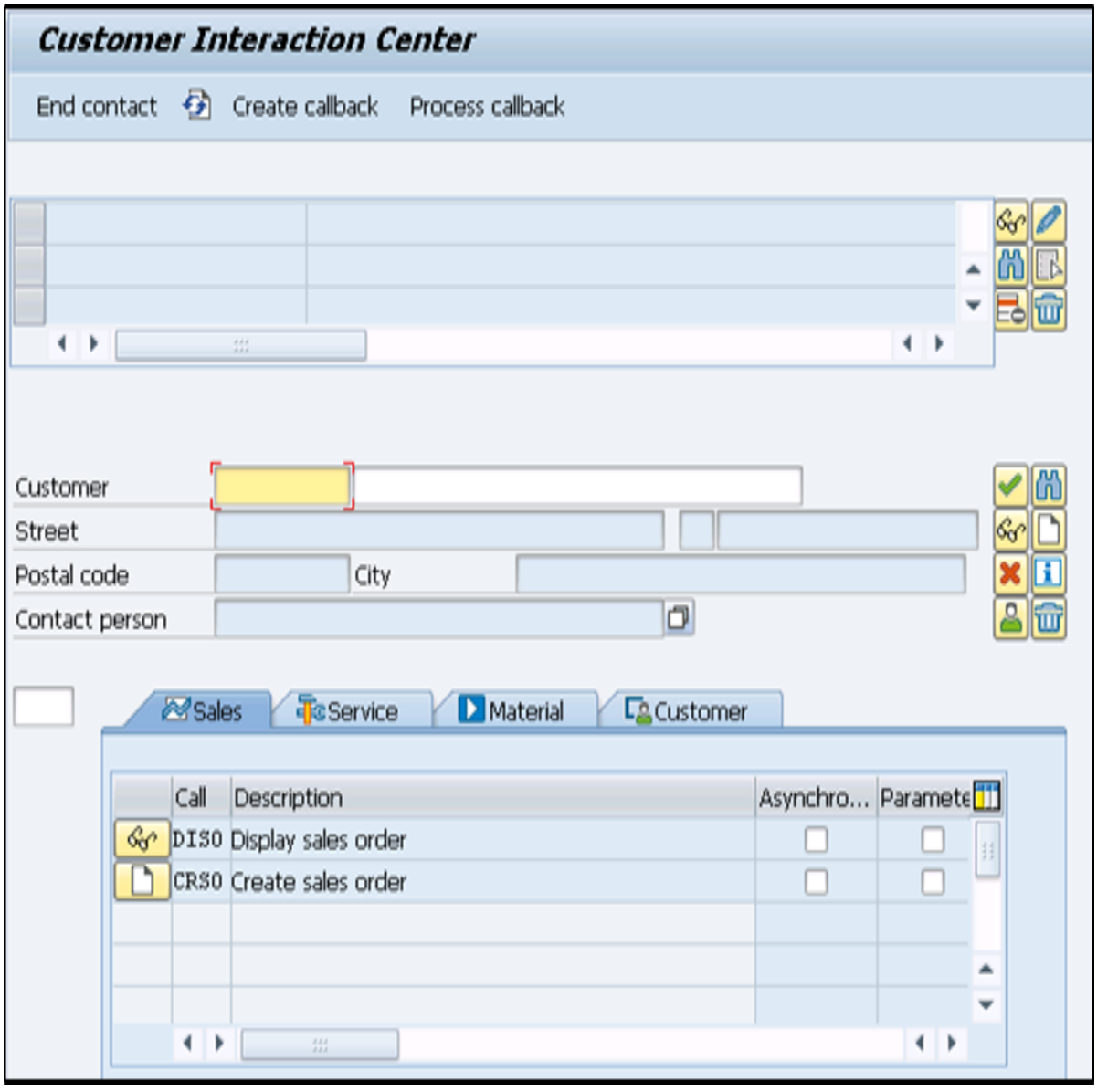
5. SAP CRM – GUI

The SAP GUI is a front-end tool and is used for system administration and customization in SAP Implementation guide (IMG). There are a few administration tasks and transactions which are available in SAP GUI and are accessible from SAP Easy access.

Some of these transactions available in SAP Easy access are discussed below.

CIC0: Customer Interaction Center



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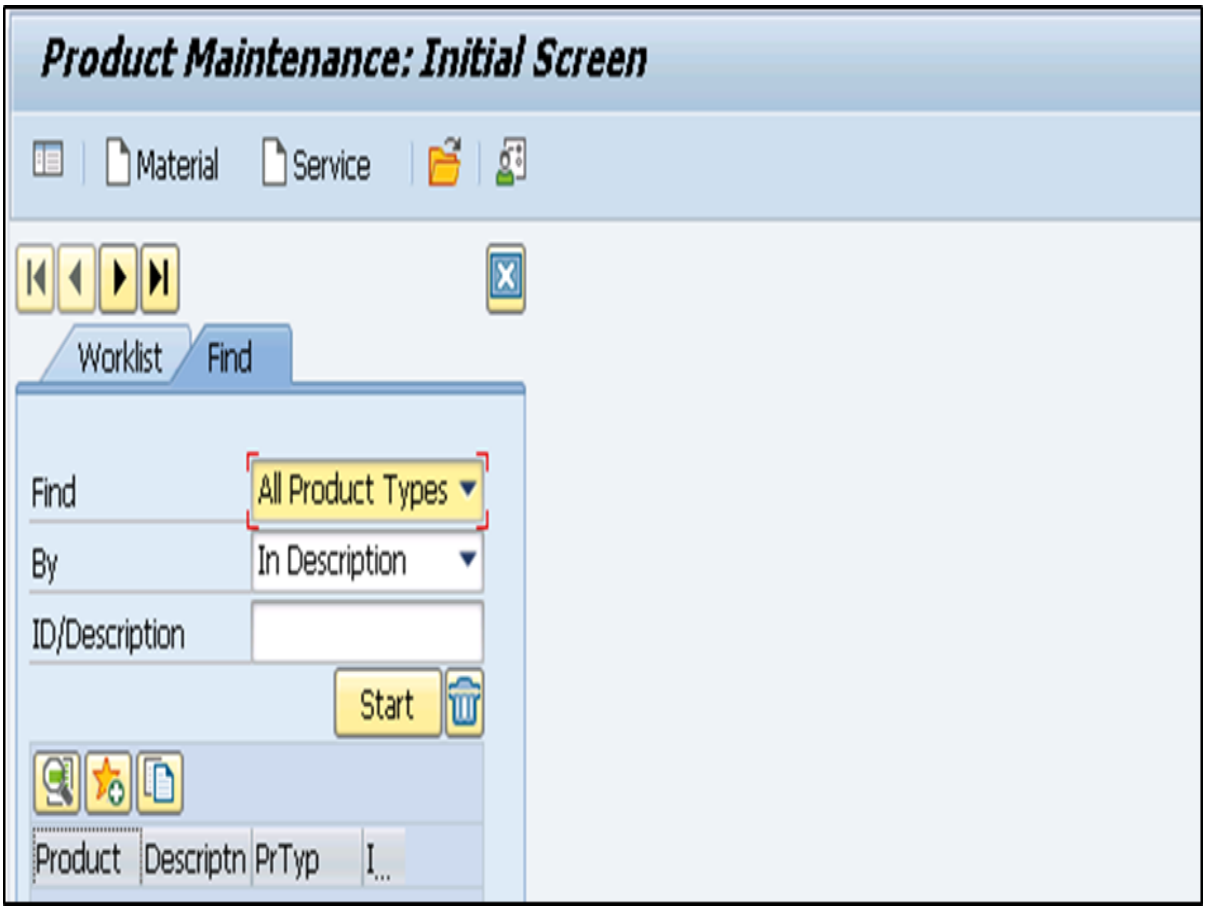
COMMPR01: Maintain Products



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6. SAP CRM – WebClient UI

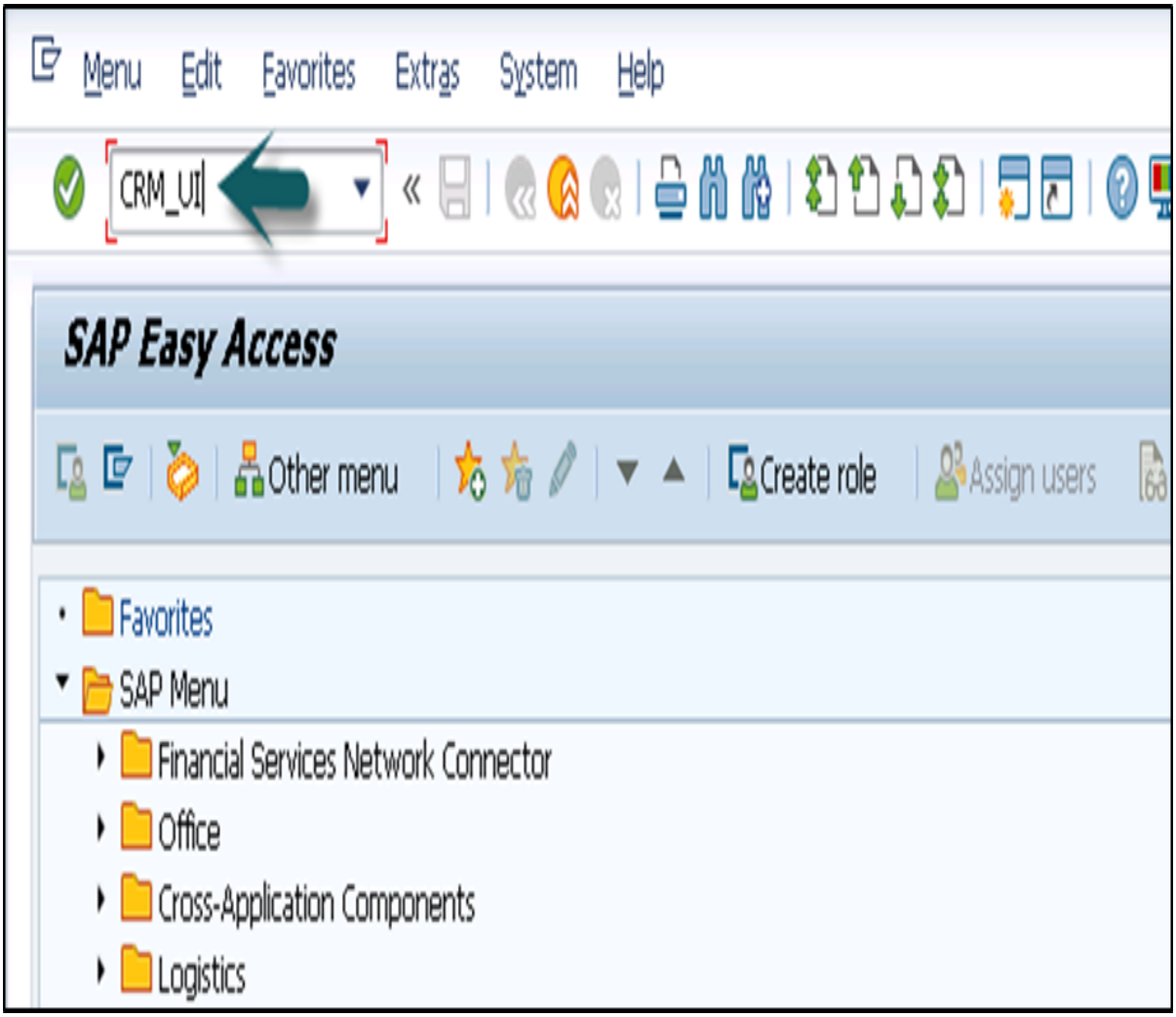
SAP GUI is used to perform administration tasks in SAP CRM. To perform customization and configuration of CRM activities, a client tool is recommended by SAP which is known as SAP CRM WebClient User Interface.

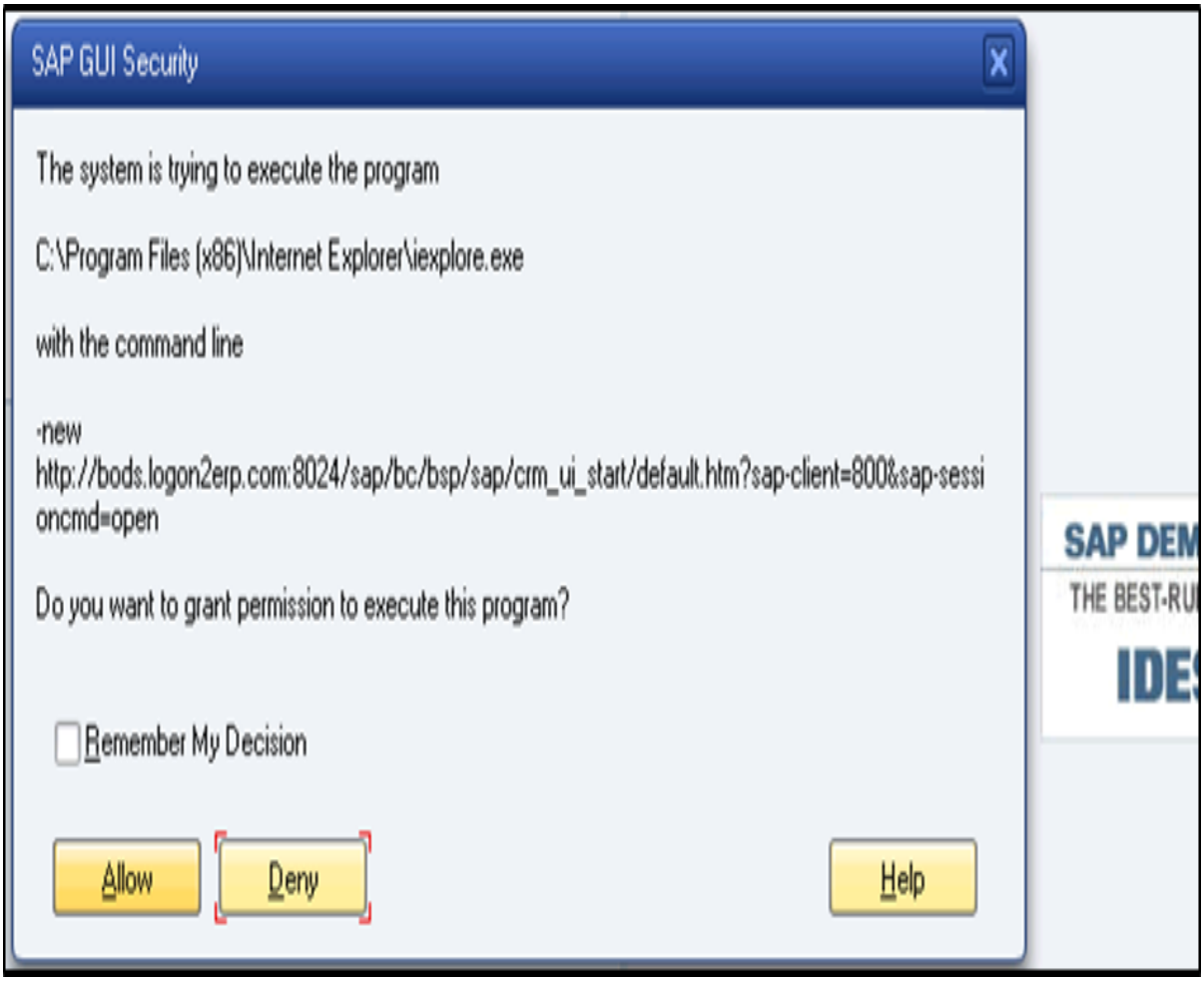
How to Login to SAP CRM WebClient?

You can login to SAP CRM WebClient via SAP GUI. To open the login window, you can use the following transaction code:

T-Code: CRM_UI and press Enter.

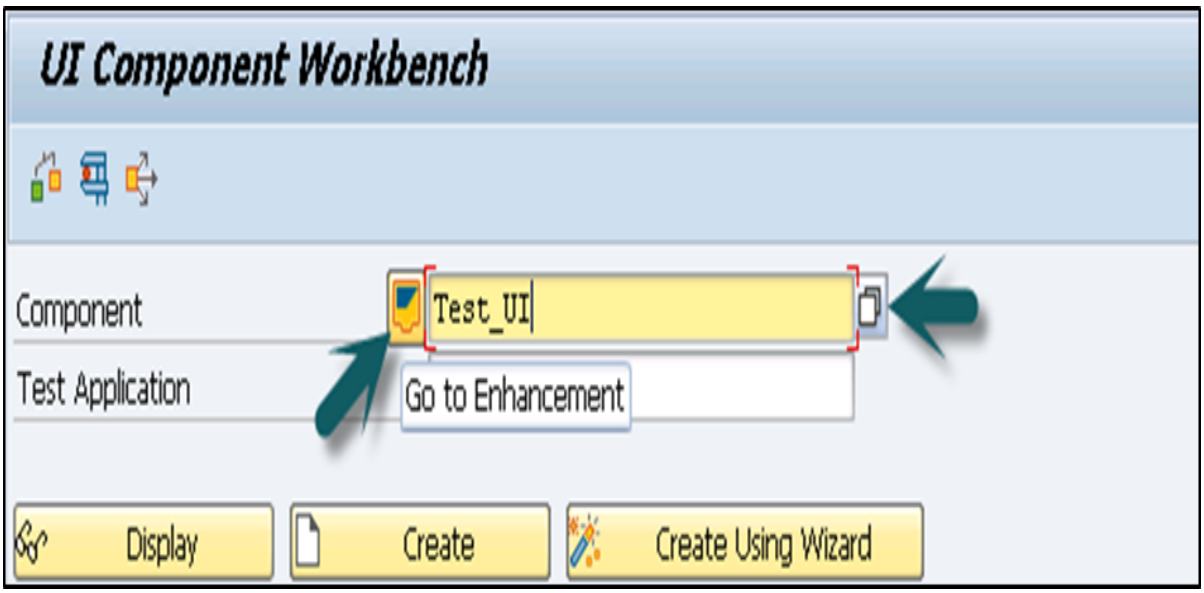
If nothing happens, it shows that you are using an older version of SAP CRM.





Once you click allow, you will see the following screen with login details.

Use **Transaction code: BSP_WD_CMPWB** and enter the name in the Component field and click Execute.



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When you click Execute, you will see the login screen of CRM WebClient UI. Enter the user name and password to login.

WebClient UI Components

This SAP CRM WebClient is used to access only those applications for which a user role is assigned and have the authorization. In case there is a user with a single role added to his profile he/she can only login with that role and does not get an option to select the role on the login page.

When there are multiple roles assigned to a user, he/she can select one of the available roles in order to log-in to the CRM Web UI.

SAP CRM WebClient is divided into three parts, which are:

- Navigation bar
- Header Area
- Work Area

The entire frame in UI WebClient is known as the Navigation bar. You can navigate to different pages in this Navigation bar. The Header area is at the top and contains the system links, work area title, saved searches, history, etc.

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The Work area is a place where changes happen with user actions and where user works. The work area also contains work center groups, overview pages, email inbox, etc.

The following is a list of all the components in a SAP CRM WebClient UI:

- Header and Navigation bar
- Home page
- Work center page
- Search page
- Overview page
- Edit page
- Edit list page
- Search help dialog box
- Value help dialog box
- Personalization dialog box
- Freestyle application page

Header Area

The Header area is at the top and its position is fixed in the SAP CRM Web Client. You can also set its height in the CRM as per your requirement.

The following are the components that are present in the Header area:

- System Links in sequence
- Work Area Title
- Page History
- Saved Searches

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