

# Influencing SAP: Customer Connection

## Delivery Call for Focus Topic CRM 2015

Wolfgang Oelschlaeger – Product Owner CRM, Jean Yves Guyomarc'h - Development Lead CRM WebUI  
Anja Weber – Customer Connection  
August 5, 2015

Customer

# Legal disclaimer

---

The information in this presentation is confidential and proprietary to SAP and may not be disclosed without the permission of SAP. This presentation is not subject to your license agreement or any other service or subscription agreement with SAP. SAP has no obligation to pursue any course of business outlined in this document or any related presentation, or to develop or release any functionality mentioned therein. This document, or any related presentation and SAP's strategy and possible future developments, products and or platforms directions and functionality are all subject to change and may be changed by SAP at any time for any reason without notice. The information in this document is not a commitment, promise or legal obligation to deliver any material, code or functionality. This document is provided without a warranty of any kind, either express or implied, including but not limited to, the implied warranties of merchantability, fitness for a particular purpose, or non-infringement. This document is for informational purposes and may not be incorporated into a contract. SAP assumes no responsibility for errors or omissions in this document, except if such damages were caused by SAP's willful misconduct or gross negligence.

All forward-looking statements are subject to various risks and uncertainties that could cause actual results to differ materially from expectations. Readers are cautioned not to place undue reliance on these forward-looking statements, which speak only as of their dates, and they should not be relied upon in making purchasing decisions.

# Agenda

---

- Recap of project timeline and approach
- Overview & demo of delivered improvements
- Overview of improvements in development
- Next Steps

# Customer Connection Focus Topic project

## CRM 2015

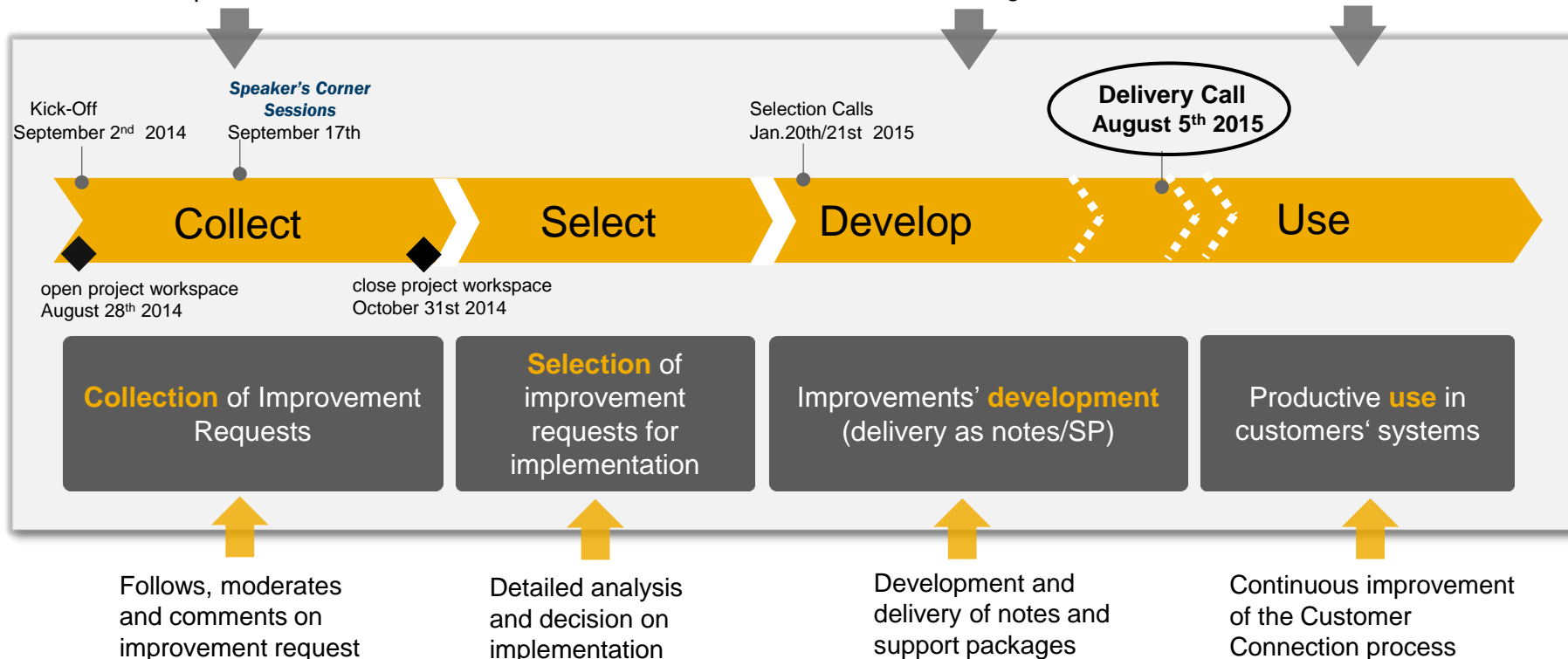


**Customers**

Submit improvement requests, **subscribe** for IR prioritization

Provide feedback in development & support testing

Provide feedback on productive use



**SAP** Project Team

# Improvement Request overview: 14 delivered improvements - WebUI Framework

ID	Title	Improvement Note	Lowest CRM Release
D6913	cancel search button should leads you back to search	2155098	7.0 EhP1
D6772	Timed out CRM does not show it is already timed out	2119701	7.0 EhP2
D7179	Enable navigation links to be opened within a new tab/browser	2135300	7.0 EhP2
D6770	Prominently Display the System ID and Client on the CRM WebUI	2139001	7.0 EhP2
D7356	Sequencing AND defaulting of drop down lists via configuration tool or something	2193909	n/a
D7068	Smart Input Help / Smart Value Help / Auto Complete Personalization Options	2149887	7.0 EhP2
D6773	Saved Search should save the sorting against multiple columns	2131434	7.0 EhP1
D7350	E-Mail editor: Default font can be changed ("times new roman")	2161387	7.0 EhP1
D6893	Change tab order for search criteria	2165904	7.0 EhP1
D7190	Common Field Labeling	2133755	n/a
D7386	UI copy configuration does not copy the buttons	2145324	7.0 EhP1

# Improvement Request overview: delivered improvements - WebUI Framework

---

ID	Title	Improvement Note	Lowest CRM Release
D7358	Service Configurator - validation of radio buttons (AET fields)	2145325	7.0 EhP1
D6911	SAP CRM save sorting for the session	1855398	7.0 EhP1
D7218	WebUI: Use BPath expression for tag attributes	2158293	7.0 EhP1

# Cancel Search

## Improvement Request: [D6913](#)

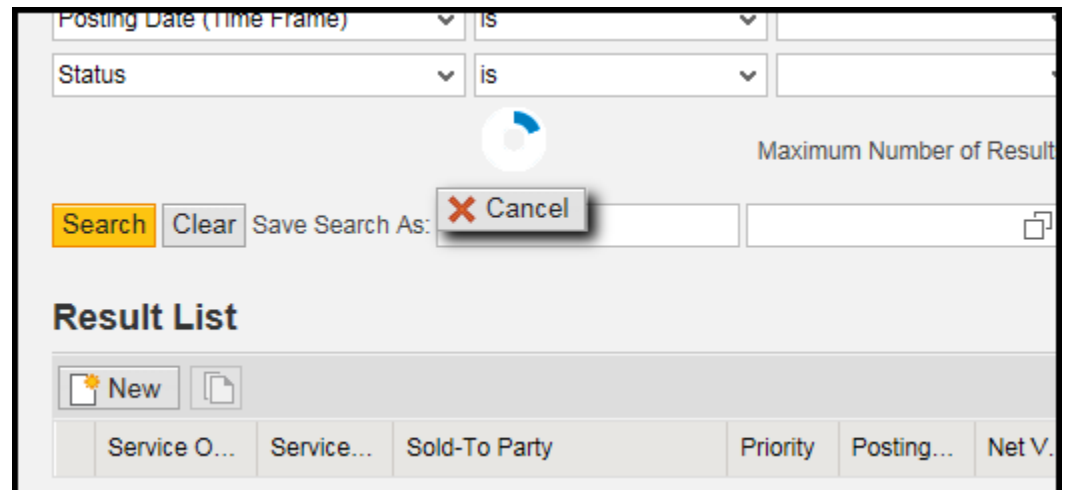
cancel search button should lead you back to search

## Improvement:

- When cancelling a long running search, the user shall be redirected to the original search page.

## Status:

- Delivered for SAP CRM >= EhP1 via SAP Note [2155098](#)



The screenshot shows a search interface with the following elements:

- Search criteria: "Posting Date (Time Frame)" and "Status" are set to "is".
- Buttons: "Search" (yellow), "Clear", "Save Search As:", and "Cancel" (with a red X icon).
- Text: "Maximum Number of Results" is visible on the right.
- Section: "Result List" is displayed below the search form.
- Table: A table with columns "Service O...", "Service...", "Sold-To Party", "Priority", "Posting...", and "Net V..." is partially visible.

# Timeout Notification

Demo

## Improvement Request: D6772

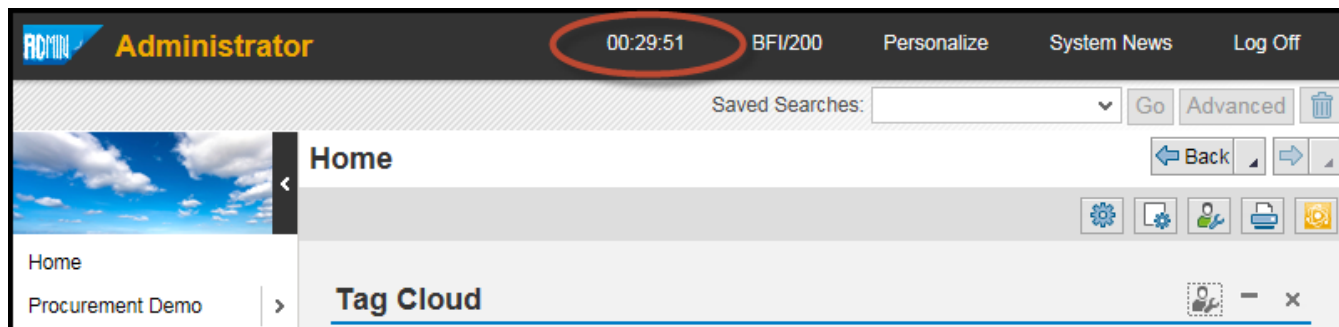
Timed out CRM does not show it is already timed out

## Improvement:

- The user will receive a notification prio to the system timeout
- An optional clock in the header will show the remaining session time

## Status:

- Delivered for SAP CRM >= EhP2 via SAP Note 2119701





# Open links in a new browser tab

Demo

## Improvement Request: [D7179](#)

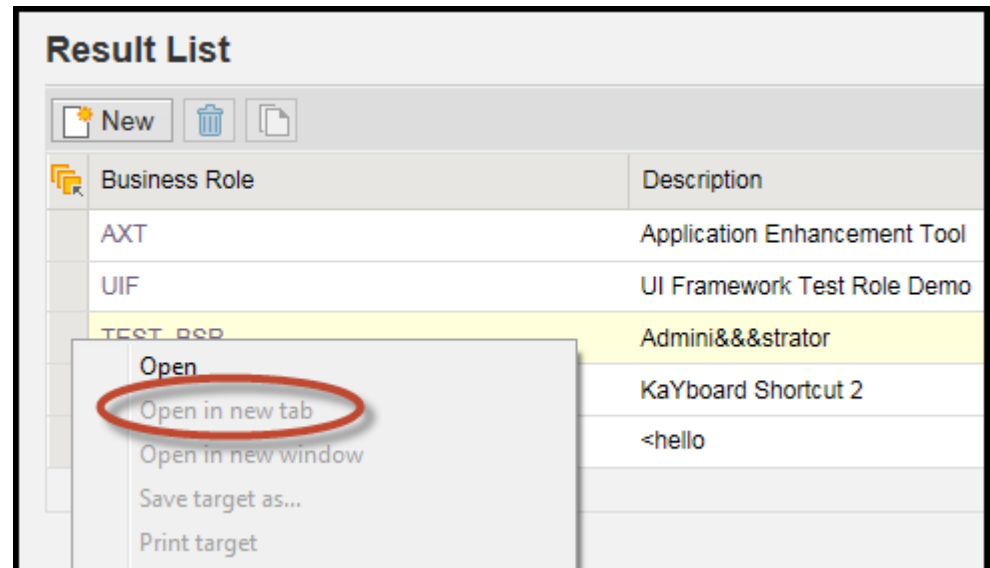
Enable navigation links to be opened within a new tab/browser

## Improvement:

- The user should be able to open links in new browser tabs.

## Status:

- Delivered for SAP CRM  $\geq$  EhP2 via SAP Note [2135300](#)



# System ID/Client in Header

## Improvement Request: [D6770](#)

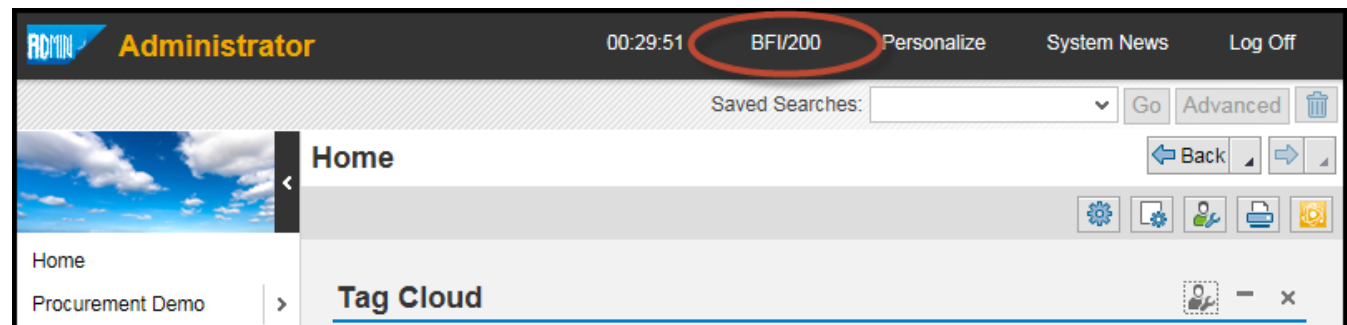
Prominently Display the System ID and Client on the CRM WebUI

## Improvement:

- Display the system ID and client in the CRM Header. Display connected system as well (e.g. ECC).

## Status:

- Delivered for SAP CRM >= EhP2 via SAP Note [2139001](#)



# Default Value for Drop Down Lists

## Improvement Request: [D7356](#)

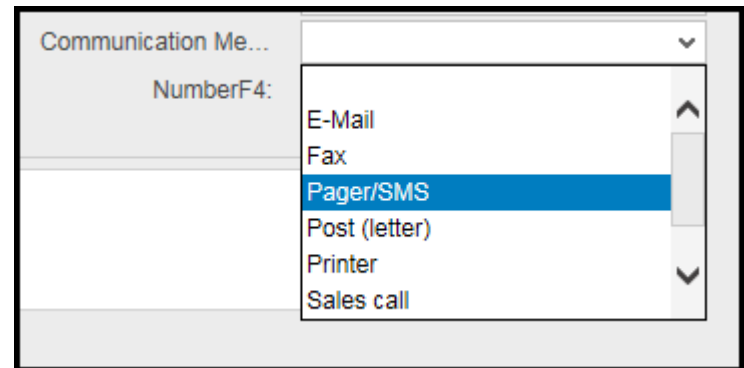
Sequencing AND defaulting of drop down lists via configuration tool or something

## Improvement:

- Provide a way for the power user to configure the default value of a drop down list.

## Status:

- Consulting Improvement Note [2193909](#)



# Smart Value Help Personalization

## Improvement Request: [D7068](#)

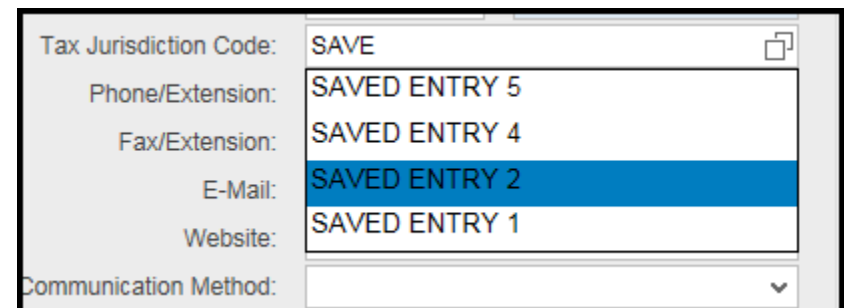
[Smart Input Help / Smart Value Help / Auto Complete Personalization Options](#)

### Improvement:

- Provide the user the option to turn on either the Saved Entries or the Smart Value Help features.
- Provide the user the option to delete previously Saved Entries.

### Status:

- Delivered for SAP CRM >= EhP2 via SAP Note [2149887](#)



The screenshot shows a SAP CRM form with a list of saved entries. The list is as follows:

Tax Jurisdiction Code:	SAVE
Phone/Extension:	SAVED ENTRY 5
Fax/Extension:	SAVED ENTRY 4
E-Mail:	SAVED ENTRY 2
Website:	SAVED ENTRY 1
Communication Method:	

The entry "SAVED ENTRY 2" is highlighted in blue. There is a copy icon in the top right corner of the list area.

# Multi Column sorting

Demo

## Improvement Request: [D6773](#)

Saved Search should save the sorting against multiple columns

## Improvement:

- Allow the user to sort against multiple columns in a table.
- Saved Searches should also save multiple column sorting.

## Status:

- Delivered for SAP CRM >= EhP1 via SAP Note [2131434](#)

**Result List: More than 100 Flights found**

New

Airline	Flight Number	Flt
Singapore Airlines	MultiSort Ascending	10
Singapore Airlines	MultiSort Descending	17
Singapore Airlines	0114	24

# Rich Text Editor: set a default font

---

## **Improvement Request:** [D7350](#)

E-Mail editor: Default font can be changed ("times new roman")

## **Improvement:**

- Provides a way for the customer to set a default font system wide for the Rich Text Editors used in CRM.

## **Status:**

- Delivered for SAP CRM >= EhP1 via SAP Note [2161387](#)

# Quickly navigate between Search Criteria

Demo

## Improvement Request: [D6893](#)

### Change tab order for search criteria

## Improvement:

- Allow the user to quickly navigate between Search Criteria values rather than tabbing over Search Criteria and Search Operators before being able to enter a value.

## Status:

- Delivered for SAP CRM >= EhP1 via SAP Note [2165904](#)

The screenshot shows the 'Search Criteria' interface. At the top, there is a 'Search For:' dropdown menu with 'Partner by Partner Data' selected. Below this, there is a table of search criteria. The first row is 'Business Partner ID' with the operator 'is' and the value '1231456'. The second row is 'Company' with the operator 'is' and an empty value field. The third row is 'Company' with the operator 'is' and an empty value field. The third row is highlighted with a blue border. To the right of each row are icons for adding (+) and removing (-) criteria. At the bottom right, there is a 'Maximum Number of Results:' field with the value '100'.

Search For:	Operator	Value	Actions
Partner by Partner Data			
Business Partner ID	is	1231456	+ -
Company	is		+ -
Company	is		+ -

Maximum Number of Results: 100

# Common field labeling

---

**Improvement Request:** D7190

Common Field Labeling

## **Improvement:**

- Provide a comprehensive user guide on how to change labels in CRM (via Configuration, Design Layer, OTR etc...)

## **Status:**

- Consulting Improvement Note 2133755



# Copy OVP Button Configuration

## Improvement Request: [D7386](#)

UI copy configuration does not copy the buttons

## Improvement:

- When copying an Overview Page Configuration, the corresponding Button Configuration should be copied as well.

## Status:

- Delivered for SAP CRM  $\geq$  EhP1 via SAP Note [2145324](#)

The screenshot displays the SAP CRM configuration interface. The top section is titled 'Configurations' and contains a table with the following data:

Component N...	Page	Role Config. ...	Component U...	Object Type	Object S
CRM_BRC_UI	BRCBUSINE...	UIF	<DEFAULT>	<DEFAULT>	<DEFAU
CRM_BRC_UI	BRCBUSINE...	<DEFAULT>	<DEFAULT>	<DEFAULT>	<DEFAU

Below the table is the 'Button Configuration' section, which includes a 'Show Technical Details' button and a 'Maximum Number of Buttons Displayed' input field set to 10. The 'Button Configuration' table is as follows:

ID	Text	Icon Source	Type
save			SAVE
			SEPARATOR

# Validation of Mandatory Radio Buttons

---

## **Improvement Request:** [D7358](#)

Service Configurator - validation of radio buttons (AET fields)

## **Improvement:**

- As a radio button group can be initial (no radio button selected), it should be possible to flag this element as mandatory.

## **Status:**

- Delivered for SAP CRM >= EhP1 via SAP Note [2145325](#)

# SAP CRM save sorting for the session

---

**Improvement Request:** [D6911](#)  
SAP CRM save sorting for the session

## **Improvement:**

- This new development enables Personalization and Configuration for sorting, filtering and fixed columns for tables across the Web Client UI.

## **Status:**

- Delivered for SAP CRM >= EhP1 via SAP Note [1855398](#) (SP only)

# Use BPath expression for tag attributes

---

## **Improvement Request:** [D7218](#)

WebUI: Use BPath expression for tag attributes

## **Improvement:**

- The Global Tag Attributes should support Bpaths

## **Status:**

- Delivered for SAP CRM >= EhP1 via SAP Note [2158293](#)

# Improvement Request overview: 7 improvements in development - WebUI Framework

ID	Title	Planned Delivery <sup>(*1)</sup>	Lowest CRM Release
D7183	Enable customer defined help documents per screen	Q3 2015	7.0 EhP1
D6837	Design layer: ability to redefine GET/SET methods of context node	Q4 2015	7.0 EhP3
D6778	Bluecrystal (Fiori-like) theme for CRM WebUI	Q3 2015	7.0 EhP2
D6925	Option to display a field as loading bar / progress indicator	Q3 2015	7.0 EhP1
D6745	SAPGUI Dynpro/screen PBO-like influence for fields	Q4 2015	7.0 EhP1
D7339	Unique/direct link (URL) to create a Service Order or display the search result of a Saved Search	Q3 2015	7.0 EhP1
D7328	Search result list should show recently used objects	Q3 2015	7.0 EhP1

(\*1) only planned - **no** commitment concerning release dates

# Improvement Request overview:

## 29 delivered improvements – Applications (1)

ID	Title	Improvement Note	Lowest CRM Release
D6722	My Open Tasks on Home Page customizable	2124939	7.0 EhP1
D6981	Improve Business Partner search performance	2132825	7.0 EhP3
D6719	Create new contact person while maintaining an activity	2124940	7.0
D6836	Business partner merge: make it work for AET tables	2104164	7.0 EhP1
D7334	Show attachment symbol in result lists and assignment blocks	2141594	7.0 EhP1
D7355	Filter by Transaction Type in Interaction History-You can only add an admin filter on Tran Cat	2104946	7.0 EhP1
D6982	Drag and Drop attachment functionality for IC Email	2127681	7.0 EhP1
D7351	E-Mail editor: More comfortable Email functionality	2173692	7.0 EhP2
D6901	SAP Contact Center: Optimize View for autoallocation mode Q - result after History Search	2180029	SAP Contact Center 7.0 SP08
D7086	Displaying archived CRM-Data in the IC Webclient	1501341	6.0
D7375	Service Request Management: Enhance Checklist Step Partner Determination	2023386 (simple) 22023352 (decision based)	7.0 EhP1 (simple) 7.0 EhP3 (decision based)

# Improvement Request overview:

## 29 delivered improvements – Applications (2)

ID	Title	Improvement Note	Lowest CRM Release
D7252	Agent Inbox in Classic View does not support Saved Searches	n.a.	7.0
D6720	Ask to delete (archive) person when last relation to organization is deleted	2104152	7.0 EhP1
D6776	Selection for different fact sheets for accounts	2104590	7.0
D6812	Add Partner Functions of Service Requests as Subscribers to Notification Framework	2161849	7.0 EhP2
D6881	CRM Service: make available “reason for status” to service request	2110959	7.0
D7428	Discrepancy in View- Interaction History & Service Request OV	2104955	7.0 EhP2
D6884	Update multiple iObjects by editing common values only one time	2129559	7.0 EhP1
D7140	Fast change of ERP sales document items (LORD interface)	2117218	7.0 EhP1
D1391	Prevent a Service Order from mismatch between Ship-To and iObject	2115697	7.0 EhP1
D6796	Enable Macros with Webservice data in Word templates	2112005	7.0 EhP1

# Improvement Request overview: 29 delivered improvements – Applications (3)

ID	Title	Improvement Note	Lowest CRM Release
D6880	Business Partner: mutually exclusive BP roles	2104189	7.0 EhP1
D7251	CRM: "Save and Back" in Surveys	2161433	6.0
D7324	Near me feature for Accounts: Show Accounts on Map	2104728	7.0 EhP3
D6888	Create Service Contracts & Quotes from iBase Search Results	2147945	7.0 EhP3
D6890	Determine Contract Pricing and Discounts, based on iBase location	2106219 (consulting note)	7.0 EhP2
D6891	Copying custom fields from Quotation to Contract	2110739	7.0 EhP2
D7245	automatic refresh for transaction after creating attachments and archiving	2120547	7.0
D7332	Flexible assignment block on Account Overview to show Transactions	2104731	7.0 EhP1



# Enable personalization and configuration data retrieval parameters in My Open Tasks

Demo

## Improvement Request: [D6722](#)

Enable personalization and configuration of data retrieval parameters in My Open Tasks.

## Improvement:

The personalization button and the configuration of data retrieval parameters is enabled to customize the transaction types which should be visible in “My Open Tasks” assignment block.

## Status:

- Delivered for SAP CRM  $\geq$  7.01 with SAP Note [2124939](#)
- CRM EHP3 SP09
- CRM EHP2 SP15
- CRM EHP1 SP14

The screenshot shows the 'My Open Tasks' interface. At the top right, there is a 'New!' button and a red square icon. Below this, the date '13.03.2015' is displayed. The main content area is titled 'My Task' with the number '1003'. A blue header bar contains 'Data Retrieval Parameters' and 'Clear Parameters'. Below this, there is a configuration field for 'Transaction Type' with a dropdown arrow, followed by the text 'is' and another dropdown arrow. To the right of this field is a plus sign icon and a 'New!' label.

# Search by name without sorting result list by account ID

---

## **Improvement Request:** D6981

Improve business partner search performance.

## **Improvement:**

The performance of searching for accounts by name can be improved. The result list will not be sorted by account ID.

## **Status:**

- Delivered for SAP CRM >= 7.13 SP08 with SAP Note 2132825

# Enable a new button to quickly create contact person in partner selection popup

Demo

## Improvement Request: [D6719](#)

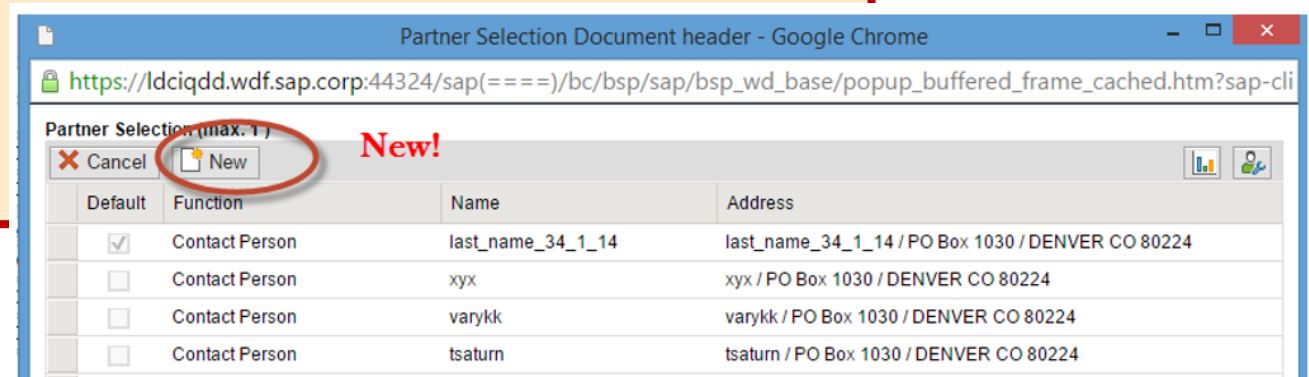
Enable 'New' button to quickly create contact person in the dynamic popup of the partner selection.

## Improvement:

In the Activity overview page, after having entered an account triggering the partner selection popup, a 'New' button is available in the popup that allows the possibility to quickly create a new contact person.

## Status:

- Delivered for SAP CRM >= 7.00 with SAP Note [2124940](#)
- CRM EHP3 SP09
- CRM EHP2 SP15
- CRM EHP1 SP14
- CRM EHP0 SP17



# Option to merge the AET table enhancements

## Improvement Request: D6836

When merging accounts (BUPA CLEAR) all enhancements done with AET shall be considered, without additional customer-specific coding.

## Improvement:

During a merge the table enhancements for BUT000, sales area data, relationship data are also considered.

## Status:

- Delivered for SAP CRM >= 7.01 with SAP Note 2104164
- CRM EHP3 SP10
- CRM EHP2 SP16
- CRM EHP1 SP15

The screenshot displays the 'Cleansing Case' interface in SAP CRM. The main area shows a 'Schedule Merge' for accounts 4103859 and 4103858. The 'Accounts' table lists the source and target accounts. The 'Compare Accounts' section shows the master account (4103859) and source account (4103858) being compared. The 'General Data' and 'Referenced Data' sections show the details of the accounts and their relationships.

ID	Name	Status	Created on	Created By	To Be Archived	Category
4103859	test aet master, Germany	Master	12.05.2015	Jyotshna Rani Bal	<input type="checkbox"/>	Organization
4103858	test aet source, India	Source	12.05.2015	Jyotshna Rani Bal	<input type="checkbox"/>	Organization

Data Entity	Select	Master	Source
Relationships	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Main Address	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sales Extension	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Role Extensions	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Shipping	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

# Attachment icon in result lists and assignment blocks

Demo

## Improvement Request: [D7334](#)

Show attachment symbol in result lists and assignment blocks.






## Improvement:

Search result lists for transactions like *Activities* or *Service Requests*, some assignment blocks and in the *Interaction History* now can contain an additional column indicating whether an entry contains one or more attachments.

## Status:

- Delivered for SAP CRM  $\geq 7.01$  with SAP Note [2141594](#)
- CRM EHP3 SP09
- CRM EHP2 SP15
- CRM EHP1 SP14

**Result List: 3 Activities Found**

Attachment	Due	Start Date	End Date	Description
		2015.04.21	2015.04.24	Customer Visi
		2015.04.21	2015.04.21	Trade Fair Pre
		2015.04.21	2015.04.21	Visit after Trai

# Additional parameters for data retrieval in the "Interaction History" assignment block of the account

## Improvement Request: [D7355](#)

Filter by Transaction Type in Interaction History.

## Improvement:

"Transaction Type" and further parameters are provided for data retrieval in the "Interaction History" assignment block in the "Account" overview page. For making available further data retrieval parameters a BAdI is provided.

## Status:

- Delivered for SAP CRM >= 7.02 with SAP Note [2104946](#)
- CRM EHP3 SP08
- CRM EHP2 SP15
- CRM EHP1 SP14
- CRM 7.0 SP17

The screenshot shows the 'Data Retrieval Parameters' configuration interface. It features a table of parameters for data retrieval, each with a dropdown menu for the parameter name, a radio button for the operator (set to 'is'), and a text input field for the value. The 'Transaction Type' row is highlighted with a red border. To the right of each row are expand/collapse icons (+/-). A 'Clear Parameters' button is located at the top right of the table.

Data Retrieval Parameters		Clear Parameters
Timeframe	is	
Start Date	is	
Posting Date	is	
Status	is	
Transaction Category	is	
Transaction Type	is	
Partner Function	is	
Partner Function Category	is	
Sales Organization	is	
Distribution Channel	is	
Division	is	
Impact	is	
Urgency	is	
Priority	is	

# Drag and drop for attachments of e-mails in the IC

Demo

## Improvement Request: [D6982](#)

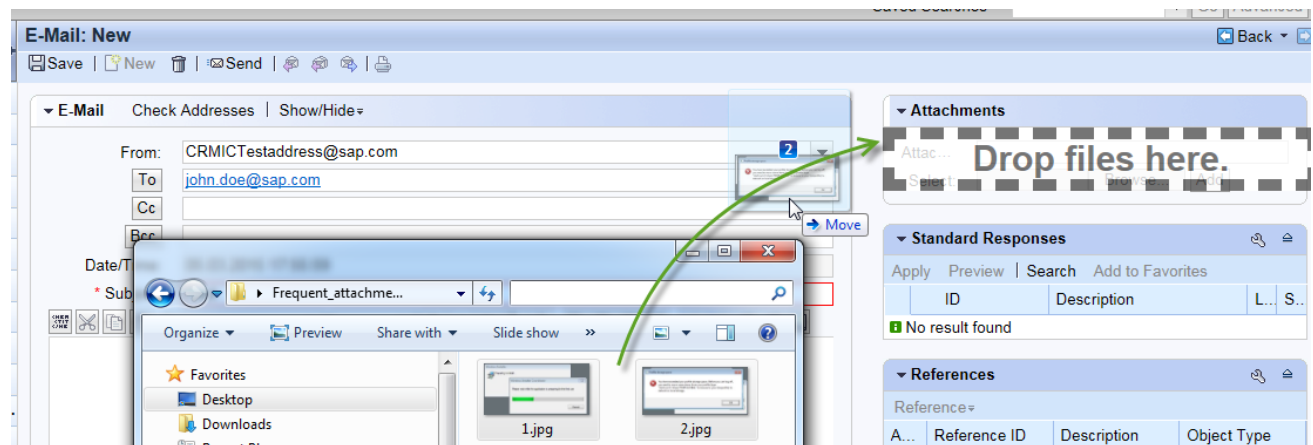
Drag and drop attachment functionality for Interaction Center e-mails.

## Improvement:

Users can attach multiple files to e-mails in the IC via drag and drop.

## Status:

- Delivered for SAP CRM >= 7.01 with SAP Note [2127681](#)
- CRM EHP3 SP08
- CRM EHP2 SP15
- CRM EHP1 SP14



# E-Mail editor: More comfortable Email functionality

## Improvement Request: [D7351](#)

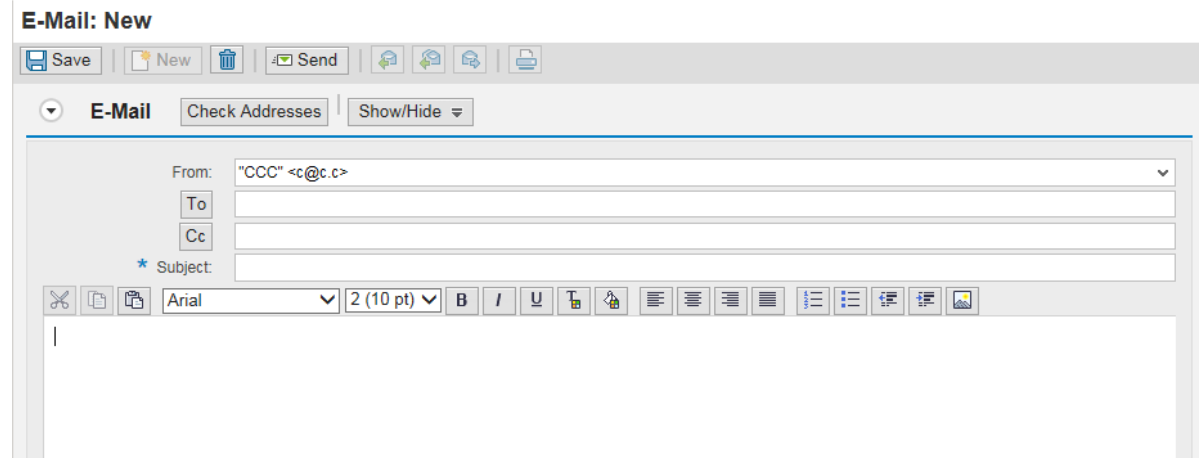
E-Mail editor: More comfortable Email functionality (in IC).

## Improvement:

More formatting options with new editor, copy and paste of images.

## Status:

- Delivered for SAP CRM >= 7.02 with SAP Note [2173692](#)





# Contact search in CDT / new search results view

## Improvement Request: [D6901](#)

SAP Contact Center: Optimize view for autoallocation mode Q - result after history search.

## Improvement:

- For email search in CDT new result fields (subject and agent) are added
- For the search itself the behavior of the search window by allowing it to remember the settings of previous search is improved

## Status:

- Delivered in SAP Contact Center Version 7 SP8 see SAP Note:[2180029](#)

Contact ID	Queue	Subject	Agent	Status	Time	Duration
T11_Reporting_Admin@dev-he email1_t11		2015-01-16 10:05: Reporting da (None)		In Queue	16.01.2015 12:05	00:03
T11_Reporting_Admin@dev-he email1_t11		2015-01-16 09:05: Reporting da (None)		In Queue	16.01.2015 11:05	00:08
T11_Reporting_Admin@dev-he email1_t11		2015-01-16 08:05: Reporting da (None)		In Queue	16.01.2015 10:05	00:05
T11_Reporting_Admin@dev-he email1_t11		2015-01-16 07:05: Reporting da (None)		In Queue	16.01.2015 09:05	00:06
T11_Reporting_Admin@dev-he email1_t11		2015-01-16 06:05: Reporting da (None)		In Queue	16.01.2015 08:10	00:48

New search result fields:

- Subject Field
- Agent Field

# SAP Interaction Center: Search for Archived documents

## Improvement Request: D7086

Displaying archived CRM data in the Interaction Center WebClient.

## Improvement:

A new flag in the interaction history screen enables agents to switch from a search in the current business transactions to a search in the business transactions that are already archived.

**Status:** Delivered for SAP CRM  $\geq 600$  with SAP Note 1501341

The screenshot displays the SAP Interaction Center search interface. The search criteria are as follows:

- Transaction Category: Business Activity
- From Date: 29.10.2014
- to: 07.03.2015
- Transaction ID: (empty)
- Description: (empty)
- Account ID: 3271
- From Archive:  (highlighted with a red box)

The search results show 57 Customer Interactions Found. The table below lists the first five results:

Date	Channel	Description	Status
11.02.2015	Internet Mail	Campaign_b2b_sp08	Completed
11.02.2015	Internet Mail	Campaign_b2b_sp08	Completed
11.02.2015	Internet Mail	Campaign_b2b_sp08	Completed
11.02.2015	Internet Mail	Campaign_b2b_sp08	Completed
11.02.2015	Internet Mail	Campaign_b2b_sp08	Completed

# Partner determination for check list items

---

## **Improvement Request:** [D7375](#)

Service request management: enhance check list item partner determination.

## **Improvement:**

The feature enables the partner determination functionality within checklist items of the simple check list and the decision-based check list.

## **Status:**

- Simple check list
  - Delivered for SAP CRM  $\geq$  7.01 with SAP Note [2023386](#)
  - CRM EHP3 SP05
  - CRM EHP2 SP15
  - CRM EHP1 SP14
- Decision-based check-list
  - Delivered for SAP CRM  $\geq$  7.13 with SAP Note [2023352](#)
  - CRM EHP3 SP05

# Option to archive Contact Person when its last relationship to an account is deleted

## Improvement Request: [D6720](#)

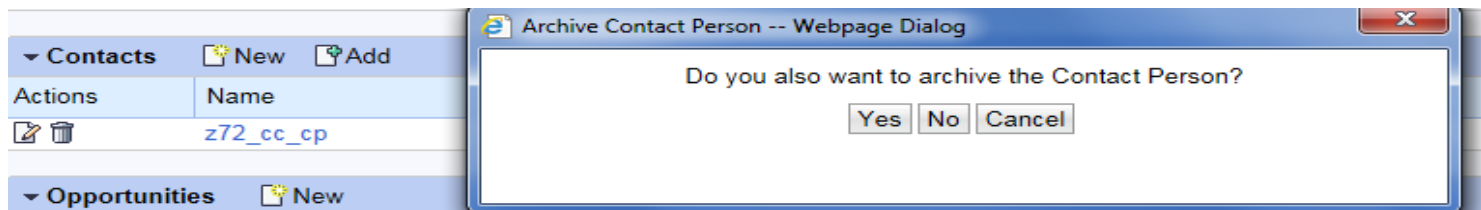
Possibility to delete (set archiving flag of) a Contact Person when its last relation to an account is deleted.

## Improvement:

When a contact relationship is deleted in the Contacts assignment block, and if the Contact Person is not a contact for any other account, it is now possible for the user to set the archiving flag for the Contact Person.

## Status:

- Delivered for SAP CRM  $\geq$  7.01 with SAP Note [2104152](#)
- CRM EHP3 SP09
- CRM EHP2 SP16
- CRM EHP1 SP15



# Use of multiple PDF fact sheets in account overview page

## Improvement Request: [D6776](#)

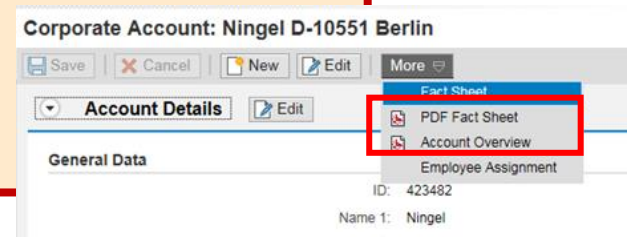
Selection for different fact sheets for accounts.

## Improvement:

Multiple forms can be entered for each PFCG role in the Customizing transaction SPRO, under Customer Relationship Management -> UI Framework -> UI Framework Definition -> Fact Sheet -> Visibility and Printing. In the "Account" overview page the different PDF factsheets are provided based on this Customizing.

## Status:

- Delivered for SAP CRM >= 7.00 with SAP Note [2104590](#)
- CRM EHP3 SP08
- CRM EHP2 SP15
- CRM EHP1 SP14
- CRM 7.0 SP17



# New subscriber type 'Dynamic recipient' for notification framework

## Improvement Request: [D6812](#)

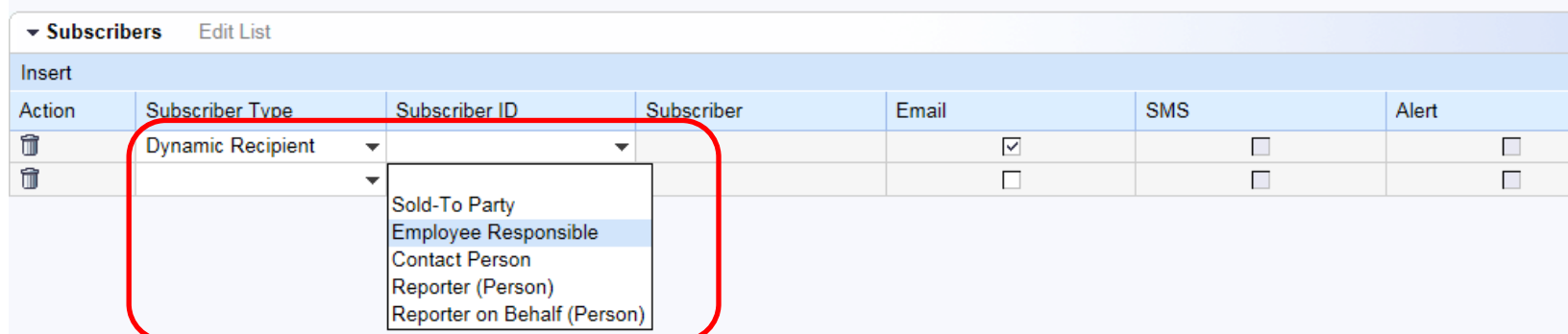
Add partner functions of service requests as subscribers to notification framework.

## Improvement:

In addition of sending a notification to a fixed entity (User, Organization Unit or a Business Partner), a new subscriber type called 'Dynamic Recipient' is provided. With this, a notification (Email, SMS, CRM alert) is sent to a business partner, which is automatically determined based on the related transaction.

## Status:

- Delivered for SAP CRM  $\geq$  7.02 SP05 with SAP Note [2161849](#)



The screenshot shows the 'Subscribers' table in SAP CRM. The table has columns for Action, Subscriber Type, Subscriber ID, Subscriber, Email, SMS, and Alert. A dropdown menu is open for the 'Subscriber Type' column, showing options: Sold-To Party, Employee Responsible, Contact Person, Reporter (Person), and Reporter on Behalf (Person). The 'Dynamic Recipient' option is currently selected in the table.

Action	Subscriber Type	Subscriber ID	Subscriber	Email	SMS	Alert
	Dynamic Recipient			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Reason for status in service request/service order

## Improvement Request: D6881

Introduce a reason status in service request and service order.

## Improvement:

Users can set a reason similar to the sales scenarios.

## Status:

- Delivered for SAP CRM  $\geq 7.01$  with SAP Note 2110959
- CRM EHP3 SP08
- CRM EHP2 SP15
- CRM EHP1 SP14

The screenshot displays the SAP 'Service Order New: New' form. The 'Service Order Details' tab is active, showing two main sections: 'General Data' and 'Processing Data'. In the 'Processing Data' section, the 'Status' dropdown menu is highlighted with a green box and set to 'Open'. Below it, the 'Reason' dropdown menu is also visible. The 'General Data' section includes fields for ID, Description, Sold-To Party, and Contact. The 'Processing Data' section includes fields for External Reference, Priority (set to Medium), Net Value (0.00), and Gross Value (0.00). The form also features a toolbar with buttons for Save, Cancel, New, Create Follow-Up, Print, Print Preview, and More, along with navigation icons for Back and Forward.

# Consider partner function category "Contact Person" in "Service Requests" assignment block of account

## Improvement Request: D7428

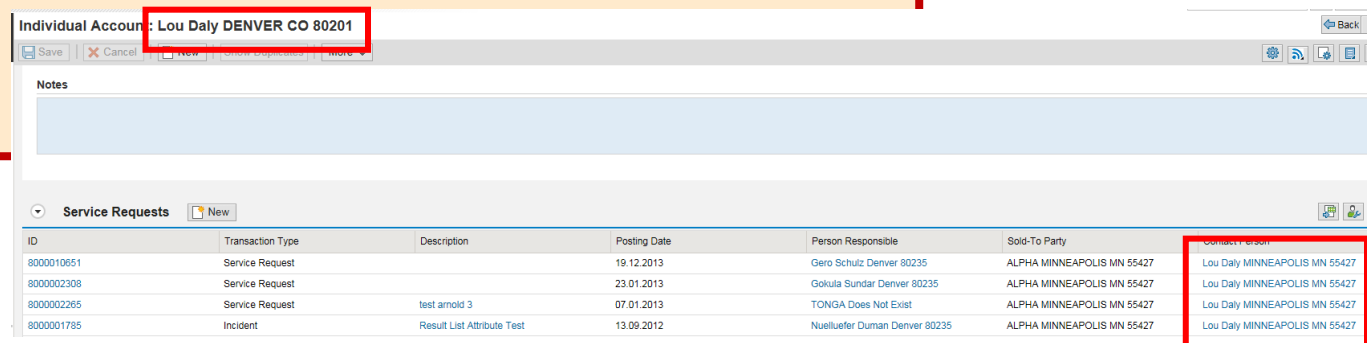
Discrepancy in View - Interaction History & Service Request Overview Page (OSS 924345/2014).

## Improvement:

The "Service Requests" assignment block in the "Account" overview page also shows transactions in which the account is assigned with a partner function of the category "Contact Person".

## Status:

- Delivered for SAP CRM >= 7.02 with SAP Note 2104955
- CRM EHP3 SP08
- CRM EHP2 SP15



Individual Account: Lou Daly DENVER CO 80201

Notes

Service Requests

ID	Transaction Type	Description	Posting Date	Person Responsible	Sold-To Party	Partner Function
8000010651	Service Request		19.12.2013	Gero Schulz Denver 80235	ALPHA MINNEAPOLIS MN 55427	Lou Daly MINNEAPOLIS MN 55427
8000002308	Service Request		23.01.2013	Gokula Sundar Denver 80235	ALPHA MINNEAPOLIS MN 55427	Lou Daly MINNEAPOLIS MN 55427
8000002265	Service Request	test arnold 3	07.01.2013	TONGA Does Not Exist	ALPHA MINNEAPOLIS MN 55427	Lou Daly MINNEAPOLIS MN 55427
8000001785	Incident	Result List Attribute Test	13.09.2012	Nuelluefer Duman Denver 80235	ALPHA MINNEAPOLIS MN 55427	Lou Daly MINNEAPOLIS MN 55427



# Mass change common attributes of installed base components (object type)

## Improvement Request: [D6884](#)

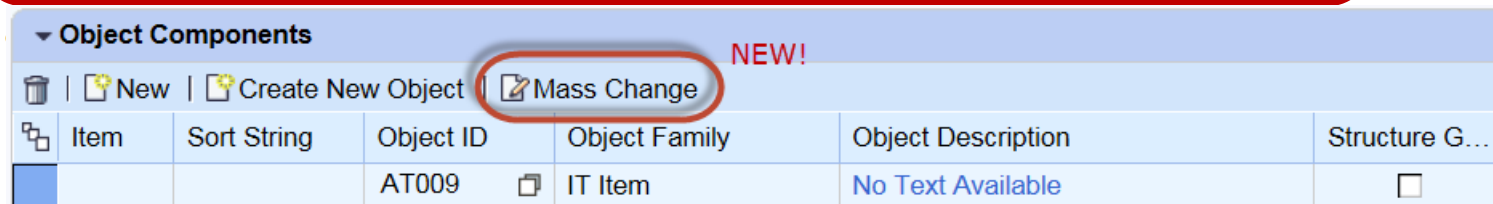
Update multiple iObjects by editing common values only one time.

## Improvement:

Add a Mass Change button to the Object Components assignment block. The button can be switched on or off in Customizing for different business roles. With this button, you can enable the mass processing of common attributes of multiple selected Installed Base Components (object type). The mass changeable standard fields are Description, Identification, Item, Sort string, other custom fields created with AET.

## Status:

- Delivered for SAP CRM  $\geq 7.01$  with SAP Note [2129559](#)
- CRM EHP3 SP09
- CRM EHP2 SP16



The screenshot shows the SAP Object Components assignment block. The 'Mass Change' button is highlighted with a red circle and a 'NEW!' label. The table below shows the data for the selected object.

Item	Sort String	Object ID	Object Family	Object Description	Structure G...
		AT009	IT Item	No Text Available	<input type="checkbox"/>

# Fast change of plants, rejection reasons and requested delivery dates in ERP sales documents

## Improvement Request: [D7140](#)

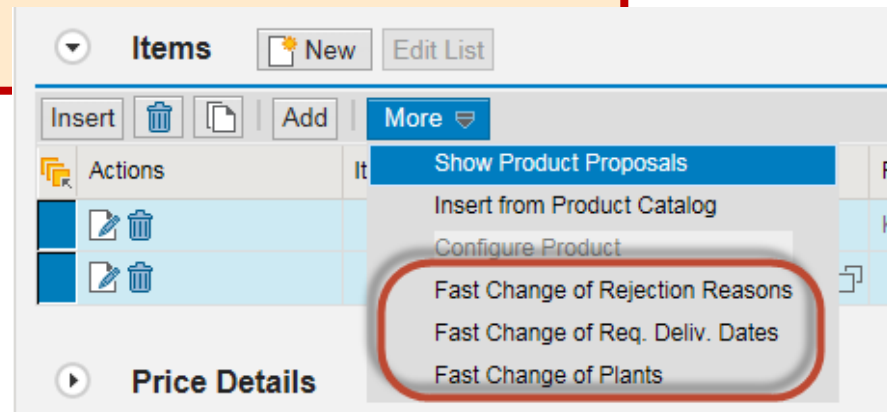
Edit / Fast Change of attributes in ERP sales documents in CRM WebClient UI.

## Improvement:

The *Items* assignment block on the business transaction overview page of ERP sales order and ERP quotation is enhanced by new buttons that allow fast (mass) changes for more than one item at the same time.

## Status:

- Delivered for SAP CRM  $\geq$  7.01 with SAP Note [2117218](#)
- CRM EHP3 SP08
- CRM EHP2 SP15
- CRM EHP1 SP14



# Prevent partner mismatch in service order

## Improvement Request: D1391

The partners of the service orders should be compared with the ones maintained in the installed base.

## Improvement:

If partners of the service order do not match the partners maintained in the installed Base the user is informed.

## Status:

- Delivered for SAP CRM >= 7.01 with SAP Note 2115697
- CRM EHP3 SP08
- CRM EHP2 SP15
- CRM EHP1 SP14

The screenshot displays the SAP 'Service Order: New' form. The 'General Data' section shows 'Sold-To Party' as 'British Group'. The 'Reference Objects' section shows 'Installed Base' as '5500' and 'British Corporation IBase'. The 'Processing Data' section shows 'Priority: Medium', 'Status: Open', and 'Reason:'. The 'Dates' section shows 'Requested Start: 14.01.2015 00:00'. A pop-up error message is visible, stating: 'Details Pricing procedure could not be determined', 'Sold-to party of IBase and of transaction do not match', and 'Details Pricing data for partner British Group Y (417633)'. The error message is highlighted with a green box.

# Enable macros with web service data in Word templates

## Improvement Request: [D6795](#)

Enable Macros with Web service data in Word templates.

## Improvement:

When creating a MS word template in SAP CRM, after selecting “Template with Macro”, the template can be downloaded to the local disk. The user can design this template by creating a macro, save it as “.docm” document and finally uploads it back to the system to finish the creation.

## Status:

- Delivered for SAP CRM  $\geq$  7.01 with SAP Note [2112005](#)
- CRM EHP3 SP08
- CRM EHP2 SP15
- CRM EHP1 SP14

Template Details

File Type:	Microsoft Word
Name:	Test_0323
Description:	Test Template
Object Type:	BUS2000111
Language:	EN

No Webservice  Webservice Name  Own WSDL URL

WS Name: /CRMWST/ROM\_PRODUCT

Download Template:

Template with Macro

File name: Test\_0323.docm

Save as type: Word Macro-Enabled Document (\*.docm)

Authors: SAP WebAS Tags: Add a tag Title: Add a title

# Mutually exclusive business partner roles

## Improvement Request: D6880

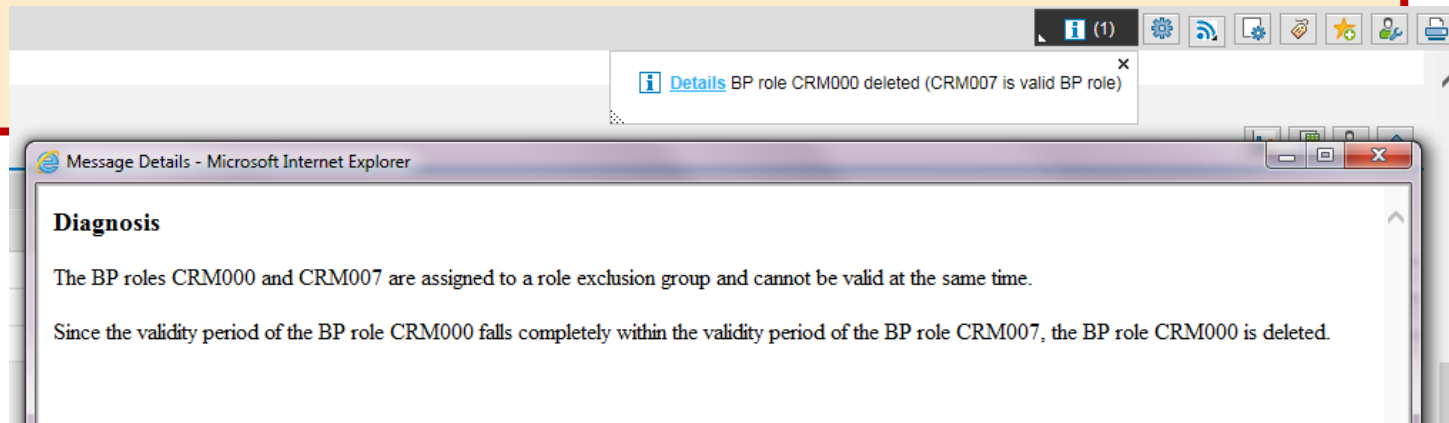
Possibility to define which business partner roles are mutually exclusive for the CRM WebClient UI.

## Improvement:

Improvement provides the concept of business partner exclusion groups as it was available in SAP GUI for Windows.

## Status:

- Delivered for SAP CRM  $\geq 7.01$  with SAP Note 2104189
- CRM EHP3 SP01
- CRM EHP2 SP01
- CRM EHP1 SP03



# "Save and Back" in surveys

## Improvement Request: [D7251](#)

Provides a button that enables save and back in one step.

## Improvement:

When clicking on "Save and Back" the survey gets saved and the system navigates back, so the previously necessary two steps have been combined into one single step.

## Status:

- Delivered for SAP CRM  $\geq 6.0$  (CRM 2007) with SAP Note [2161433](#)
- CRM EHP3 SP09
- CRM EHP2 SP16
- CRM EHP1 SP15
- CRM 7.0 SP18
- CRM 6.0 SP17

**Task: New - Task Details**

Back | **Save and Back** | Save

ID / Descripti... TEST\_SURVEY TEST\_SURVEY

Version:

**Test Survey**

**Section 1**

Please enter your full name.

First Name:

Last Name:

Save Reset

# View accounts of search result list in map

## Improvement Request: [D7324](#)

Near me feature for Accounts: Show Accounts on Map.

## Improvement:

The account search result list in the CRM WebClient UI of SAP CRM can be switched to a map view. This shows the accounts in the map. From there it can be navigated to the "Account" overview page of each account visualized in the map.

## Status:

- Delivered for SAP CRM  $\geq$  7.13 SP10 with SAP Note [2104728](#)

The screenshot displays the SAP CRM search interface. At the top, there are search controls including 'Search', 'Clear', 'Reset', 'Save Search As:', 'Include View', and 'Save'. Below this, the search results are shown in a table view with the heading 'Result List: 6 Accounts Found'. The table has columns for 'ID', 'Name', and 'Phone'. A red arrow points to the 'Map' button in the table's header row. To the right of the table, a map view is visible, showing a geographical area with several cities marked, including Amsterdam, Groningen, Bremen, Hamburg, Hanover (Hannover), Berlin, and Magdeburg. The map view also has a heading 'Result List'.

ID	Name	Phone
305978	Friedrich Keikutt	+49 (16)
306198	Georg Kosalla	+49 (16)
305624	Helena Keitsch	+49 (16)

# Creating and updating service contracts or quotations from installed base components

## Improvement Request: [D6888](#)

Create service contracts and service quotations from installed base search results.

## Improvement:

Enable the user to create or update Service Contracts and Service Contract Quotations from IBase search result. Partner information in Service Contracts and Service Contract Quotations will be derived from the Sold-To Party in IBase header and a BAdI is provided for customers to implement their own logic when creating or updating Service Contracts or Service Contract Quotations Line Item.

## Status:

- Delivered for SAP CRM >= 713 via SAP Support Package, details in Note [2147945](#)
- CRM EHP3 SP09

Result List: More Than 100 Installed Base Components Found

Installed Base	Component	Identification	Component Type	Description	Valid From	Valid To
606	617		CRM Individual Object		12.10.2006 12...	31.12.9999 23...
1073	1076		CRM Individual Object		07.03.2012 09...	31.12.9999 23...
5500	5507		CRM Individual Object		14.01.2015 13...	31.12.9999 23...



# Copy routine for service contracts

---

## **Improvement Request:** D6891

Dates should be copied from service contract quotation to the follow-up service contract.

## **Improvement:**

Copying control takes the date profile into consideration during the follow-up process, this means the dates can be copied from the service contract quotation to the service contract.

## **Status:**

- Delivered for SAP CRM  $\geq$  7.01 with SAP Note 2110739
- CRM EHP3 SP08
- CRM EHP2 SP15
- CRM EHP1 SP14

# Enable "Refresh" button on "Attachments" assignment block

## Improvement Request: [D7245](#)

Automatic refresh for transaction after creating attachments and archiving.

## Improvement:

Add a "Refresh" button on "Attachment" assignment block, which could be switched on/off via customizing for different business roles. It enables refreshing of the assignment block to get the latest attachments assigned to a business object.

## Status:

- Delivered for SAP CRM >= 7.00 with SAP Note [2120547](#)
- CRM EHP3 SP08
- CRM EHP2 SP15
- CRM EHP1 SP14

Attachments							
Attachment URL With Template   Advanced Refresh							
Actions	Name	Type	Create...	Created On	MIME ...	Defaul...	
Properties	FAX_2...	Micros...	HOSU...	04.08.2014 19:10	applica...		<input type="checkbox"/>
Properties	2003_...	Micros...	XIAJA	13.01.2014 04:44	applica...		<input type="checkbox"/>

# Flexible assignment block on Account Overview to show transactions

---

## **Improvement Request:** [D7332](#)

Flexible assignment block on Account Overview to show transactions.

## **Improvement:**

A guide is provided that describes how an own assignment block, containing transactions, for example of a specific type, can be created. This is based on the "Interaction History" assignment block.

## **Status:**

- Delivered for SAP CRM  $\geq$  7.02 with SAP Note [2104731](#)
- CRM EHP3 SP08
- CRM EHP2 SP15
- CRM EHP1 SP14
- CRM 7.0 SP17

# Improvement Request overview: improvements in development - Applications

ID	Title	Planned Delivery <sup>(*1)</sup>	Lowest CRM Release
D6829	A simple method is needed to load selective ERP data into the CRM system, after the initial load	Q3 2015	7.0 EhP1
D6885	Business Partner: consistency between BP roles and BP relationships	Q3 2015	7.0 EhP1
D6912	SAP CRM Account search criteria sales organisation by SAP	Q3 2015	7.0 EhP1
D7189	Territory Management Enhancements	open	7.0 EhP1
D7372	Display UserID in Org Structure as per PPOMA_CRM	Q3 2015	7.0 EhP1
D7436	Wrong time zone used in billing and accounting	Q3 2015	7.0 EhP2

(\*1) only planned - **no** commitment concerning release dates

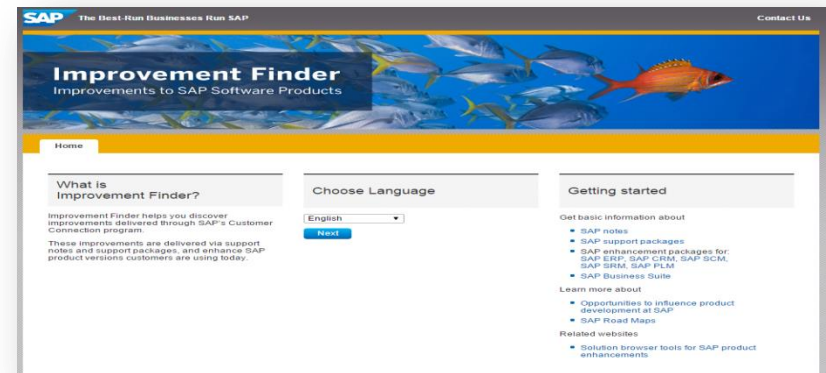
# SAP Improvement Finder & Customer Influence site

## Visit **SAP Improvement Finder**:

- **Find** areas for improvement in your SAP products
- **Use** established maintenance processes (SAP Notes; support packages)

<http://www.sapimprovementfinder.com> »

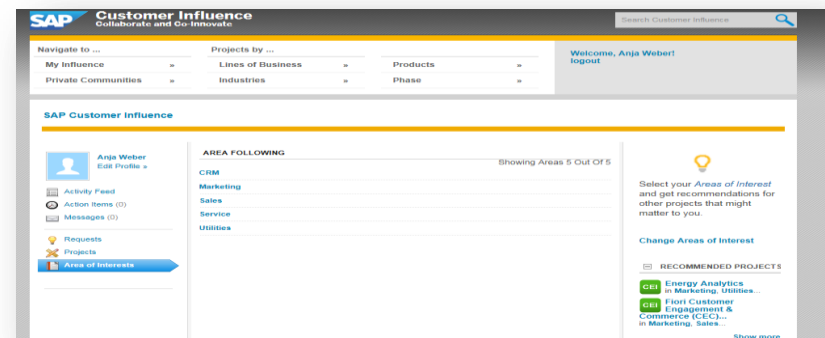
## Benefit and Use



## Visit **Customer Influence Site** :

- **Follow** areas for interest [maintain in your profile)
- **Receive** notifications about new influence projects

## Never miss an influence opportunity



# What's next ?

---

- **Adopt** the new improvements in your productive environment
- **Share** your experience with us & participate at the survey & share your story on Customer Influence
- **Join-** Do you have additional Improvement Requests ?  
**Participate** in the new project - join here <https://influence.sap.com/CRM2016>



# Questions & Answers



# Thank you!



Visit us:

[www.sap.com/cc](http://www.sap.com/cc)



Follow us:

[SAP Community Network \(SCN\)](http://SAP Community Network (SCN))



Join us:

[Twitter.com/SAP CustCon](https://Twitter.com/SAP CustCon)

Questions or remarks? We are here for you.



Anja Weber

Customer Connection

Email:

[anj.weber@sap.com](mailto:anj.weber@sap.com)



Wolfgang Oelschläger

Product Owner CRM

Email:

[wolfgang.oelschlaeger@sap.com](mailto:wolfgang.oelschlaeger@sap.com)



Jean -Yves Guyomarc'h

Web UI Dev. Lead

Email:

[jean-yves.guyomarc-h@sap.com](mailto:jean-yves.guyomarc-h@sap.com)



# Appendix

# Improvement Request overview: handed over and pending improvements - Applications

ID	Title	Planned Delivery <sup>(*)</sup>	Lowest CRM Release
D6769	Rich Text Editor functionality in Notes of CRM transactions	t.b.d.	t.b.d.
D6774	Deletion program for inbound emails	t.b.d.	t.b.d.
D6775	Autocomplete/type ahead feature for account search	t.b.d.	t.b.d.
D7354	Text management: Separate logging for different text types	t.b.d.	t.b.d.
D7427	Ability to check and format phone numbers according to country rules	t.b.d.	t.b.d.