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| Master Data Script  SAP S/4HANA - 18-09-20 | public |
| Create Business Partner Master Data for Service (47X) |

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# Purpose

A customer is a business partner to which goods and services are sold and delivered. A business partner can be a customer and a supplier at the same time if, for example, your customer also supplies goods to you. A customer master holds information about the customer such as their name, address, bank details, tax details and delivery and billing preferences. This customer information is used and stored in transactions such as sales orders, deliveries and invoices. Some customer information is specific to a particular company (known as company code) or sales unit (known as sales area) within your organization.

Adapt Business Partner Master Data for S/4HANA Service Processes:

In this document you find a description of how to adapt a Business Partner Master Data master data record so that you can use it for scope items Service Contract Management OP (426); Presales Management OP (41V); Service Order Management OP (41Z); Interaction Center Service Request Management OP (41W).

# Prerequisites

## System Access

|  |  |
| --- | --- |
|  | Details |
| SAP S/4HANA | Accessible via SAP Fiori launchpad. Your system administrator provides you with the relevant URL.  Note For the Create Billing Document Requests chapter you need to access SAP GUI; as an alternative, ask your system administrator to execute this chapter for you. |

## Roles

Assign the following business roles to your individual test users. Alternatively, if available, you can create business roles and predefined apps for the SAP Fiori launchpad and assign the business roles to your individual test users.

These roles are examples provided by SAP. You can use them as templates to create your own roles.

For more information about business roles, refer to the Assigning business roles to a user in the [Administration Guide to Implementation of SAP S/4HANA with SAP Best Practices](https://help.sap.com/viewer/S4HANA2020_AdminGuide).

Fiori Frontend Roles

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name (Role) | ID (Role) | Description (Space) | ID (Space) | Log On |
| Customer Service Manager (Customer Management) | SAP\_BR\_CUSTOMER\_SERVICE\_MGR | N/A | N/A |  |

Application Business Roles

The business roles in the following table contain authorization and navigation objects specific to the SAP S/4HANA Service application. Your system administrator can use them as templates to create customer-specific business roles with the appropriate authorizations.

|  |  |
| --- | --- |
| Name (Role) | ID (Role) |
| S4CRM UIU - Service Professional | SAP\_S4C\_UIU\_SRV\_PRO |
| CRM Role for UIU Framework | SAP\_CRM\_UIU\_FRAMEWORK |

In addition to these Service-specific authorizations, generic SAP application access must be granted by your system administrator. The system administrator assigns all required application business roles to your system user.

Note For detailed information about roles and authorizations, refer to the SAP S/4HANA security guide at <https://help.sap.com/viewer/product/SAP_S4HANA_ON-PREMISE> > Implement.

## Preliminary Steps

The business partners of the customers must have been already created.

You can find SAP Best Practices documentation (master data script) how to create customer data here: <https://rapid.sap.com/bp/BP_OP_ENTPR> → Implementation: Create your own master data → BND Create Customer Master - MDS.

## Required Organizational Units

Values indicated in brackets, example 1710, represent values that are available if you have implemented the SAP Best Practices content of the US version for this scope item. If you have activated another country version, your system will show different values, for example 1010 for Germany.

## Main Parameters for Data Creation

In this section, we describe some basic parameters that influence the behavior of a master record and are always required to create a customer master data record.

### Account Group

Account Groups are leading control parameters for creating the ERP data segments of a customer master record. Currently, the only supported account group for customer master data is CUST. For consumer master data the account group is 0170.

### Business Partner Role

Business partner roles are used for the classification of a business partner. A business partner can have various roles. The roles you assign to a business partner reflects the functions it has in a business transaction.

### Groupings and Number Ranges

Business Partner Groupings determine the number ranges for the Business Partner IDs. You cannot change the assignment or IDs afterwards. If a Business Partner Grouping is assigned to an internal number range, you cannot enter the Business Partner ID manually. In this case, leave the field blank as the system automatically chooses a number from the assigned numeric number range.

For the business partner groupings and corresponding number ranges, which are defined for business partners (customers, suppliers, contacts, employees, and so on), you can refer to master data script BND.

For business partner consumer, a specific grouping has been created.

|  |  |  |
| --- | --- | --- |
| Grouping | Range / IDs | Comments |
| S170 | Internal numeric number range for standard use: 1000000 - 9999999 |  |

# Overview Table

This master record consists of several segments provided in the table below.

|  |  |  |  |
| --- | --- | --- | --- |
| Segment | Business Role | App/Transaction | Expected Results |
| [Assigning Sold-To Party Role to Business Partner](#unique_11) [page ] 7 | Service Professional | WebClient UI: Accounts | Role is assigned to business partner |
| [Assigning Relationships to Customers (Accounts)](#unique_12) [page ] 8 | Service Professional | WebClient UI: Accounts | Responsible business partner is assigned to customer |
| [Maintaining Communication Data of Business Partners](#unique_13) [page ] 9 | Service Professional | WebClient UI: Contacts | Communication data for contact is maintained |

# Procedures

## Adapting Business Partner

### Assigning Sold-To Party Role to Business Partner

Purpose

This activity assigns the Sold-to Party business partner role to business partners representing customers. This role is mandatory for all customers that are relevant for Service processes.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad using the role Customer Service Manager. | The Fiori Launchpad with access to the Search Accounts application is displayed. |  |
| 2 | Access the App | Choose Search Accounts (Corporate or Individuals). | The Search: Accounts screen appears. |  |
| 3 | Search for Customer | Choose: Search  Select the row with the customer for which you want to assign the role Sold-to party. | Search Accounts (Corporate or Individuals) screen appears. |  |
| 4 | Edit roles | Navigate to the Roles assignment block and choose Edit List. | List of business roles appears. |  |
| 5 | Select role | Select role Sold-to-party. |  |  |
| 6 | Save settings | Choose Save. | Role is saved successfully. |  |

Repeat steps 2.-6. for all relevant customers.

### Assigning Relationships to Customers (Accounts)

Purpose

In this chapter you assign a service employee (that you have created with Master Data Script 47Y) as the employee responsible to a customer (account).

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad using the role Customer Service Manager. | The Fiori Launchpad with access to the Search Accounts application is displayed. |  |
| 2 | Access the App | Choose Search Accounts (Corporate or Individuals). | The Search: Accounts screen appears. |  |
| 3 | Search for customer | Choose Search.  Select the row with the customer for which you want to assign relationships. | Accounts Corporate Business Partner screen appears. |  |
| 4 | Add new relationship | On the Details page navigate to Relationships assignment block and choose New. | Relationships screen opens in Edit mode. |  |
| 5 | Add relationship data | Maintain the following entries  Relationships: Has the Employee Responsible  Partner:select the relevant employee, for example Barbara Lee  Choose Back. | Data is successfully added. |  |
| 6 | Verify sales data | Navigate to Sales Area Data assignment block and verify if sales area data is maintained.  For example:  Sales Organization: Sales Organization 1710  Distribution Channel: Distribution Channel 10  Division: Product Division 00 |  |  |
| 7 | Save | Choose Save. |  |  |

Repeat steps 2.-6. for all relevant customers.

### Maintaining Communication Data of Business Partners

Purpose

If you have enabled e-mailing for the Interaction Center, make sure that the contact persons you want to use for e-mailing have a valid e-mail address assigned. For testing purposes, assign your own e-mail address to a contact person.

Optionally you can also maintain a telephone number for the contact person. This is only mandatory if you have set up the integration to a CTI system. Integration into CTI is not part of the SAP Best Practices scope.

Caution The e-mail address (and telephone number) must be unique. Do not assign the same e-mail address (and telephone number) to more than one business partner.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad using the role Customer Service Manager. | The Fiori Launchpad with access to the Search Contacts application is displayed. |  |
| 2 | Access the App | Choose Search Contacts. | The Search: Contacts screen appears. |  |
| 3 | Search for contacts | Choose Search.  Select the row with the contact for which you want to maintain contact data. | Contact Details screen appears. |  |
| 4 | Update contact information for a user | Choose a contact from the List and update the following fields  In the in the Work section, enter the following data:  Phone: Telephone number  Email: Valid e-mail address (for example, your own e-mail address, or an e-mail address you created for testing purposes) |  |  |
| 5 | Save | Choose Save. | Contact details are saved successfully. |  |

Typographic Conventions

|  |  |
| --- | --- |
| Type Style | Description |
| Example | Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options.  Textual cross-references to other documents. |
| Example | Emphasized words or expressions. |
| EXAMPLE | Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE. |
| Example | Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools. |
| Example | Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation. |
| <Example> | Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system. |
| EXAMPLE | Keys on the keyboard, for example, F2 or ENTER. |

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