Set-Up Instructions | PUBLIC
SAP S/4HANA
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Setting Up *Interaction Center Service Request Management* (41W)

THE BEST RUN

Content

1 Purpose

Before testing the Interaction Center Service Request Management scope item in your system, you must carry out manual configuration steps after the activation of the pre-defined SAP Best Practices content. This document describes the required manual settings in detail.

2 Prerequisites

The activities described in this document are based on the assumption that you have activated the SAP Best Practices for SAP S/4HANA Content Package (on premise) in a greenfield client. If you try to apply the settings of this document in a client without SAP Best Practices content, some prerequisite settings might be missing, and you cannot make use of the predefined values referenced in this document.

Your system administrator has defined system users with sufficient authorization rights to access general application functions, Service-specific functions, Interaction Center-specific functions, and customizing. You can find the standard PFCG roles relevant for Service processes in the *Security Guide* at https://help.sap.com/viewer/product/SAP_S4HANA_ON-PREMISE

- If in the chapters below it is described to log on as a configuration user, log on to the SAP S/4HANA system via SAP GUI with a user that has authorization to execute IMG configuration activities.
- If in the chapters below it is described to log on as a Customer Service Manager, access the Fiori launchpad and make sure that the mentioned SAP_BR_CUSTOMER_SERVICE_MGR role is assigned to the user.

To ensure complete data maintenance for the business partners you want to use for the *Interaction Center Service Request Management* process, refer to the master data scripts available for this scope item.

If you want to send e-mails from and to the Interaction Center, configure e-mail for SAPconnect as described in the following IMG documentation:

Transaction code	SPRO
SAP IMG Menu	*Service → Interaction Center WebClient → Basic Functions → Communication Channels → Configure E-Mail for SAPconnect*

3 Configuration

3.1 Organizational Model for Service

Some of the values mentioned in the configuration steps, 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.

To set up the system according to your own customer-specific needs, you may use your own values according to the structure of your company.

3.1.1 Setting up Integration Between Business Partners and Organizational Units

Purpose

This activity consists in setting the parameters to control the integration between business partner data and organizational units.

Procedure

1. Sign in to the SAP S/4HANA system as configuration user and choose the following navigation path:

Transaction code	SPRO
SAP IMG menu	*Service → Master Data → Business Partner → Integration Business Partner-Organization Management → Set Up Integration with Organizational Management*

2. Maintain the following settings:

Group	Sem.abbr.	Value abbr	Description
HRALX	HRAC	`X`	*Activate HR Integration*
HRALX	OBPON	`ON`	*Integration O-BP Activated*
HRALX	ONUMB	`1`	*Business Partner Number Assignment (Org. Unit)*
HRALX	OSUBG	`<empty>`	*Business Partner Subgroup (Organizational Unit)*
HRALX	PBPON	`ON`	

3. Save your settings.

3.1.2 Copying S/4HANA Sales Structure to S/4HANA Service

Purpose

This activity generates sales structures from *Sales and Distribution (SD)* in SAP S/4HANA Service.

Procedure

1. Sign in to the SAP S/4HANA system as configuration user and choose the following navigation path:

Transaction code	SPRO
SAP IMG menu	*Service → Master Data → Organizational Management → Data Transfer → Copy SD Sales Structure*

2. Select the existing and relevant SAP S/4HANA SD organizational structure. For example, if you have activated the content for the US, it will look like this:

Field Name	User action and values
SD Sales Organization	`1710`
SD Distribution Channel	`10`
SD Division	`00`

Field Name	User action and values
SD Sales Office	`170`
SD Sales Group	`170`

3. Choose *Generate*.
4. Choose *Save (Generate New Root Organization)*.

> **Note**
>
> If you have already created a root organizational unit before, the system will ask you whether you want to create a new root unit or whether you want to assign the selected sales organization to an existing root organizational unit. If you set up an organizational model for the SAP Best Practices content, we suggest to assign any additional Best Practices sales organizations to the same root organizational unit, for example, to COMP – Global Company. In this case, after selecting the relevant sales organization and then Generate, on the *Root Org. Unit Selection* dialog box select the existing root organizational unit and then choose OK (Enter). Then choose *Save*.

Result

You have created a root organizational unit for the selected sales organization. In the following sections you create an organizational model with the root organization as top organizational unit.

3.1.3 Renaming Root Organizational Unit

Purpose

In this chapter you rename the root organizational unit that was created by copying the sales organizational unit. If you are not sure which of the sales organizational units is the root unit, select one of the units displayed in the application and then choose the function Up until you reach the top node. The top node is the root organizational unit.

Procedure

1. Sign in to the SAP S/4HANA Service system as a Customer Service Manager (standard business role SAP_BR_CUSTOMER_SERVICE_MGR) and choose the following navigation path:

SAP Fiori Launchpad	*Operations → Search Organizations*

2. Rename the root that was automatically created when copying the SAP S/4HANA SD sales structure to the following code and description:

Organizational Unit CODE	Description	Hierarchy Level	Functions	Allow Org. Unit to be Determined
`COMP`	`Global Company`	`0`		

> **Note**
> For example, and depending on your system set-up, the root organizational unit's name that was generated by the system could be "Sales areas".

3. Save your settings.

3.1.4 Maintaining Organizational Units

Use

In this chapter you create organizational units as sub-units of the root organizational unit. After maintaining the sub-units, the organizational model should look like this:

Table 1: Sample Organizational Model

Organizational Unit CODE	Description	Comment: Hierarchy Level	Functions	Allow Org. Unit to be Determined
`<COMP>`	`<Global Company>`	`0`		
`<1710>`	`<Dom. Sales Org US>`	`1`	`Sales Organization`	`Sales`
`<170>`	`Sales Office 170`	`2`	`Sales Office`	
`<170>`	`Sales Group 170`	`3`	`Sales Group`	

Organizational Unit CODE	Description	Comment: Hierarchy Level	Functions	Allow Org. Unit to be Determined
`<SRV_ORG>`	`<Dom. Service Org US>`	`1`	`Service Organization`	`Service`
`<SRV_BO>`	`<Service Back Office>`	`2`	`Service Team`	`Service`
`<P_SRV_EMP>`	`<Service Employee>`	`3`	`Position`	
`<SRV_TECHGR>`	`<Service Technicians Group>`	`2`	`Service Team`	`Service`
`<P_SRV_TECH>`	`<Service Technician>`	`3`	`Position`	

> **i Note**
>
> SAP recommends that you use identical names for the sales organization in SAP S/4HANA Sales and for the assigned sales organization in SAP S/4HANA Service. This enables you to identify the correct sales organization regardless of which application you are working in.

> **i Note**
>
> Sales office and sales group are optional entries.
>
> Positions are maintained in chapter: 3.1.5 Maintaining Positions.

Procedure

1. Sign in to the SAP S/4HANA Service system as a Customer Service Manager (standard business role SAP_BR_CUSTOMER_SERVICE_MGR) and choose the following navigation path:

SAP Fiori Launchpad	*Operations → Search Organizations*

2. Maintain the details of the organizational units as per the table below:

Global Company (COMP)

General Data

Field Name	User action and values
Hierarchy Path	
Description	`Global Company`

Code	COMP	

Address

Field Name	User action and values	
Street/House No.	Hillview Avenue	3410
City	Palo Alto	
Postal code	94304	
Country	US	USA
Region	CA	California

Table 2: **Dom. Sales Org US (1710) as Sub-Node of <Global Company>**

General Data

Field Name	User action and values
Description	Dom. Sales Org US
Code	1710

Address

Field Name	User action and values	
Street/House No.	Hillview Avenue	3410
City	Palo Alto	
Postal code	94304	
Country	US	USA
Region	CA	California

Functions

Field Name	User action and values
Sales Organization	active

Allow Org. Unit to be Determined

Field Name	User action and values
Sales	active

Attributes

Field Name	User action and values		
Sales	Tupel	1000	
Sales	Country	US	
Sales	Ref. currency for document	USD	
Sales	Division	00	
Sales	Distribution Channel	10	
Sales	Postal Code	00000	99999

Sales	Region	**CA**

Optional Entries: Sales Office 170 (170) and Sales Group 170 (170)

If you have maintained sales offices and sales groups in Sales and Distribution (SD), you can also set up organizational units for them in the organization model for Service. They are not mandatory for service processes, though. Depending on your requirements, you can skip the creation of these units.

Table 3: **Sales Office 170 (170) as Sub-Node of Dom. Sales Org US (1710)**

General Data		
Field Name	**User action and values**	
Description	**Sales Office 170**	
Code	**170**	
Address		
Field Name	**User action and values**	
Street/House No.	**Hillview Avenue**	**3410**
City	**Palo Alto**	
Postal code	**94304**	
Country	**US**	**USA**
Region	**CA**	**California**
Functions		
Field Name	User action and values	
Sales Office	**Active**	

Table 4: Sales Group 170 (170) as Sub-Node of Sales Office 170 (170)

General Data		
Field Name	**User action and values**	
Description	**Sales Office 170**	
Code	**170**	
Address		
Field Name	**User action and values**	
Street/House No.	**Hillview Avenue**	**3410**
City	**Palo Alto**	
Postal code	**94304**	
Country	**US**	**USA**

Region	CA	California
Functions		
Field Name	**User action and values**	
Sales Group	Active	

Dom. Service Org US (SRV_ORG) as Sub-Node of Global Company

> **Note**
>
> For service processes, it is mandatory to define at least one service organizational unit and one service team. Decide based on your company structure how many service org. units you need.

General Data			
Field Name	**User action and values**		
Description	Dom. Service Org US		
Code	SRV_ORG		
Address			
Field Name	User action and values		
Street/House No.	Hillview Avenue	3410	
City	Palo Alto		
Postal code	94304		
Country	US	USA	
Region	CA	California	
Functions			
Field Name	**User action and values**		
Service Organization	Active		
Allow Org. Unit to be Determined			
Field Name	User action and values		
Service	Active		
Attributes			
Scenario	Field Name	Value	Value to
Service	Country	US	
Service	Postal Code	00000	99999

Service Back Office (SRV_BO) as Sub-Node of Dom. Service Org US (SRV_ORG)

General Data

Field Name	User action and values		
Description	**Service Back Office**		
Code	**SRV_BO**		
Address			
Field Name	User action and values		
Street/House No.	**Hillview Avenue**	**3410**	
City	**Palo Alto**		
Postal code	**94304**		
Country	**US**	**USA**	
Region	**CA**	**California**	
Functions			
Field Name	**User action and values**		
Service Team	**Active**		
Allow Org. Unit to be Determined			
Field Name	User action and values		
Service	**Active**		
Attributes			
Scenario	Field Name	Value	Value to
Service	Country	**US**	
Service	Postal Code	**00000**	**99999**

Service Technicians Group (SRV_TECHGR) as Sub-Node of Dom. Service Org US (SRV_ORG)

General Data		
Field Name	User action and values	
Description	**Service Technicians Group**	
Code	**SRV_TECHGR**	
Address		
Field Name	User action and values	
Street/House No.	**Hillview Avenue**	**3410**
City	**Palo Alto**	
Postal code	**94304**	
Country	**US**	**USA**
Region	**CA**	**California**
Functions		

Field Name	User action and values		
Service Team	`Active`		
Allow Org. Unit to be Determined			
Field Name	User action and values		
Service	`Active`		
Attributes			
Scenario	Field Name	Value	Value to
Service	Country	`US`	
Service	Postal Code	`00000`	`99999`

3.1.5 Maintaining Positions for the Organizational Units

Purpose

In this activity you create positions for organizational units.

Procedure

1.Sign in to the SAP S/4HANA system as a Customer Service Manager (standard business role SAP_BR_CUSTOMER_SERVICE_MGR) and choose the following navigation path:

SAP Fiori Launchpad	*Operations → Search Organizations*

2. In the organizational model display, select the line with the relevant organizational unit.

3. Choose *Position.*

4. Maintain a *Description* and a *Code* for the position.

5. Select a *Business Role*.

6. Save your entries.

For a better overview, the following table represents the complete organizational model which you already created above. The sample positions to be created now are highlighted:

Organizational Unit CODE	Description	Comment:Hierarchy Level	Functions	Business Role
COMP	Global Company	0		
1710	Dom. Sales Org US	1	Sales Organization	
170	Sales Office 170	2	Sales Office	
170	Sales Group 170	3	Sales Group	
SRV_ORG	Dom. Service Org US	1	Service Organization	
SRV_BO	Service Back Office	2	Service Team	
P_SRV_EMP	**Service Employee**	**3**	**Position**	**Service Professional (S4C_SRV_PRO)**
SRV_TECHGR	Service Technicians Group	2	Service Team	
P_SRV_TECH	**Service Technician**	**3**	**Position**	**Service Employee (S4C_SRV_EMP)**

3.1.6 Matching Sales Organizations

Purpose

This activity assigns sales organizations in SAP S/4HANA Service to the associated sales organizations in *Sales and Distribution (SD).*

Procedure

1. Sign in to the SAP S/4HANA system as configuration user and choose the following navigation path:

Transaction code	SPRO
SAP IMG menu	*Service→ Master Data → Organizational Management → Assignment of Organizational Units to SD → Assign Sales Organizations in Service to SD Sales Organizations*

2. Verify that the following settings are maintained:

Field Name	User action and values
Sales Organization ID	`<ID of Sales Org Unit 1710>`
Sales Org.	`1710`

3.1.7 Matching Sales Offices

Purpose

This activity assigns sales offices in SAP S/4HANA Service to the associated sales offices in *Sales and Distribution (SD)*.

> **Note**
>
> If you do not use sales offices, skip this step.

Procedure

1. Sign in to the SAP S/4HANA system as configuration user and choose the following navigation path:

Transaction code	SPRO
SAP IMG menu	*Service → Master Data → Organizational Management → Assignment of Organizational Units to SD → Assign Sales Offices in Service to SD Sales Offices*

2. Verify that the following settings are maintained:

Field Name	User action and values
Sales Office	<ID of Sales Office Unit 170>
Sls Office	170

3.1.8 Matching Sales Groups

Purpose

This activity assigns sales groups in SAP S/4HANA Service to the associated sales groups in *Sales and Distribution (SD)*.

> **i Note**
>
> If you do not use sales groups, skip this step.

Procedure

1. Sign in to the SAP S/4HANA system as configuration user and choose the following navigation path:

Transaction code	SPRO
SAP IMG menu	*Service → Master Data → Organizational Management → Assignment of Organizational Units to SD → Assign Sales Groups in Service to SD Sales Groups*

2. Verify that the following settings are maintained:

Field Name	User action and values
Sales Group	`ID of S/4HANA Service Sales Group Unit 170`
SD Group	`170`

3.1.9 Organizational Structure Check

Carry out the following sub chapters whenever you have updated an existing organizational model, or created a new one.

3.1.9.1 Updating List of Organizational Units

Procedure

1. Sign in to the SAP S/4HANA system as configuration user and choose the following navigation path:

Transaction code	CRMD_INDEX_OM
SAP IMG menu	*Service → Master Data → Organizational Management → Tools → Update List of Organizational Objects*

2. Execute the report with the following parameters:

Object type	
`O`	`Organizational unit`

Object type	
`S`	`Position`

3.1.9.2 Checking Settings for Attribute Maintenance

Purpose

This activity checks the consistency of the attribute assignments to the organizational units.

Procedure

1. Sign in to the SAP S/4HANA system as configuration user and choose the following navigation path:

Transaction code	COM_OM_ATTRIBUTECHK
SAP IMG menu	*Service → Master Data → Organizational Management → Tools → Check Settings for Attribute Maintenance*

2. Execute the report with the following parameters:

Field name	Value
Plan version	**01**
Attribute Maintenance Scenario	*
Current Date	**today's date**

3.1.9.3 Checking Organizational Data Settings

Purpose

This activity executes the *Check Settings for Organizational Data* program to compare the sales area data defined in *Sales and Distribution (SD)* and in SAP S/4HANA Service. You can also check the customizing settings for specific transaction types, as well as for organizational model data using various search criteria.

Procedure

1. Sign in to the SAP S/4HANA system as configuration user and choose the following navigation path:

Transaction code	CRM_ORG_PROUVE
Alternative: Customizing in IMG	*Service → Master Data → Organizational Management → Tools → Organizational Data Settings Check*

2. Choose the following parameters:

Field name	Value
Adjust Sales Area	select
Transaction Type (* = All)	*

3. Leave the other parameters empty.

4. Choose Execute.

3.1.9.4 Checking Integration Between Business Partners and Organizational Units

Purpose

This report runs a consistency check for the integration between business partner data and organizational units. If not all the data is available for the business partner, you can synchronize and repair the data first.

Procedure

1. Sign in to the SAP S/4HANA system as configuration user and choose the following navigation path:

Transaction code	SE38
Report	HRALXSYNC
SAP IMG menu	*Service → Master Data → Business Partner → Integration Business Partner-Organization Management → Create Business Partner Initially*

2. Maintain the following parameters:

Object and Check Restriction

Field Name	User action and values
Organizational Unit(s)	`active`, empty value for selection

3. Execute the report. In case the report shows errors or inconsistencies, choose *Repair*.

3.1.9.5 Updating Attribute Buffer for Generic Attributes

Purpose

This activity executes the program for the manual update of the *Attribute Buffer for Generic Attributes* for organizational data in order.

Procedure

1. Sign in to the SAP S/4HANA system as configuration user and choose the following navigation path:

Transaction code	SE38
Report	HRBCI_ATTRIBUTES_BUFFER_UPDATE

2. Execute the report with the following parameters:

Field name	Value
Attribute Buffer	
Delete All Buffers	**active**
Restructure Buffer on (Date)	**active**
Display	
Shortened	**selected**
Distribution for Mobile Clients	
No Distribution	**selected**

3.1.10 Assigning Controlling Area to Organizational Unit

Purpose

Assign the *Controlling Area* to the relevant organizational unit.

Procedure

1. Sign in to the SAP S/4HANA system as configuration user and choose the following transaction:

Transaction code	PPOME

2. Identify and select the *Global Company* organizational unit.

3. Maintain the attributes of the organizational units as per the following table:

Description:	Global Company	Code:	COMP
Account Assignment			
Field Name	**User action and values**		
Controlling Area	`A000`		Controlling Area A000

ℹ Note

After initial activation of the SAP Best Practices content, probably the default controlling area 0001 is assigned. To update this to A000, choose the Default Value Customizing button next to the Controlling Area field, and then select Controlling Area A000.

3.1.11 Assigning Master Cost Center to Organizational Unit

Purpose

When releasing a service order, it is mandatory that a cost center can be determined. So that the system can determine the cost center from the assigned service employee group (organizational unit), assign master cost centers to the relevant service organizations.

Procedure

1. Sign in to the SAP S/4HANA system as configuration user and choose the following transaction:

Transaction code	PPOME

2. Select the *Service Technicians Group*and/or*Service Back Office*organizational unit.

3. Maintain the attributes of the relevant organizational units, for example:

Description:	Service Technicians Group	Code:	SRV_TECHGR
Account Assignment			
Field Name	**User action and values**		
Master Cost Center	`17101321`		Services/Consltg(US)

3.1.12 Assigning Plant and Storage Location to Service Organization

Purpose

This activity defines which plant and which storage location of this plant is assigned to a combination of service organization, service team and service employee.

Procedure

1. Sign in to the SAP S/4HANA system as configuration user and choose the following navigation path:

Transaction code	SPRO
SAP IMG menu	Service → Master Data → Organizational Management → Cross-Application Assignment of Organizational Units → Assign Plant and Storage Location to Service Organizational Units

2. Maintain the following settings:

Field name	Value
Service Organization	**`ID of S/4HANA Service Service Org Unit SRV_ORG`**
Service Team	**`*`**
Service Employee	**`*`**
Plant	**`1710`**
Stor. Loc.	**`171A`**

3. Save your settings.

3.2 Organizational Model for Interaction Center

The previous chapter *Organizational Model for Service* described how to create an organizational model for Service. The setup of the previous chapter must be completed before you create the organization model for Interaction Center.

3.2.1 Creating an Organizational Model for Interaction Center

Purpose

In this step you create an organizational model that represents your support organization. For our use case we assume that the employees of this organization work with a business role supporting the Interaction Center. In your own organizational set-up, you can of course freely mix the use of Interaction Center and non-Interaction Center role use.

Prerequisites

Important: The organizational model for Sales must already exist, for details, refer to the *Organizational Model for Service* chapter.

Procedure

1. Sign in to the SAP S/4HANA system as a Customer Service Manager (standard business role SAP_BR_CUSTOMER_SERVICE_MGR) and choose the following navigation path:

SAP Fiori Launchpad	*Operations → Search Organizations*

2. Search for and open the *Global Company* organizational unit that you created in the *Organizational Model for Service* chapter.

3. In the organizational model display, select the line with the *Global Company* and choose *Organizational Unit*.

4. Maintain the *Organizational Unit Details* and *Attributes* as mentioned in the table below.

5. Repeat these steps for all organizational units you want to create.

Sample Organizational Units:

CODE	Description	Hierarchy Level	Functions	Allow Org. Unit to be Determined
COMP	Global Company	0		
INT_CENT	**Interaction Center**	**1**	**Service Organization**	**Service**
ICNT_1_SUP	**1st Level Support**	**2**	**Service Team**	**Service**
ICNT_2_SUP	**2nd Level Support**	**2**	**Service Team**	**Service**

Address Data for all Organizational Units:

Field Name	User action and values	
Street/House No.	Hillview Avenue	3410
City	Palo Alto	
Postal code	94304	
Country	US	USA
Region	CA	Califor-nia

Attributes for all Service Organizational Units:

Scenario	Field Name	Value	Value to
Service	*Country*	**US**	
Service	*Postal Code*	**00000**	**99999**

6. Save your settings.

3.2.2 Creating Positions for Interaction Center

Purpose

In this step you create positions for organizational units for Interaction Center.

Procedure

1. Sign in to the SAP S/4HANA system as a Customer Service Manager (standard business role SAP_BR_CUSTOMER_SERVICE_MGR) and choose the following navigation path:

SAP Fiori Launchpad	*Operations → Search Organizations*

2. Search for and open the *Global Company* organizational unit that you created in the *Organizational Model for Service* chapter.

3. In the organizational model display, select the line with the relevant organizational unit for which you want to create a position, then choose *Position*.

4. Maintain a *Description* and a *Code* for the position as displayed in the following table.

5. Select a *Business Role* as displayed in the following table.

6. Repeat these steps for all positions you want to create.

Organizational Unit CODE	Description	Hierarchy Level	Functions	Business Role
INT_CENT	Interaction Center	1	Service Organization	
ICNT_1_SUP	1st Level Support	2	Service Team	
P_IC_SRV	**IC Service Agent**	**3**	**Position**	**S4C_SRV _ICAG (Service IC Agent)**
ICNT_2_SUP	2nd Level Support	2	Service Team	
P_IC_SUP	**IC Support Agent**	**3**	**Position**	**S4C_SRV _ICAG (Service IC Agent)**

7. Save your settings.

3.2.3 Checking Organizational Structure

Purpose

To verify the correctness of your settings for organizational model for Interaction Center, execute the following steps.

Procedure

Carry out the following steps as described in the *Organizational Structure Check* sub-chapters:

- Updating List of Organizational Units
- Checking Settings for Attribute Maintenance
- Checking Organizational Data Settings
- Checking Integration between Business Partners and Organizational Units

- Updating Attribute Buffer for Generic Attributes
- Assigning Master Cost Center to Organizational Unit

3.2.4 Creating and Assigning Employee Master Data

Purpose

In this activity you create helpdesk employee master data and assign the employees to the positions that you created above.

Procedure

Creating *Employee* Master Data

For a detailed description how to create employee master data, refer to the master data script Create Employee Master Data for Service (47Y).

Create, for example, two support employees:

- Ann Anderson
- Peter Best

Assigning Employees to Positions

1. Sign in to the SAP S/4HANA system as a Customer Service Manager (standard business role SAP_BR_CUSTOMER_SERVICE_MGR) and choose the following navigation path:

SAP Fiori Launchpad	*Operations → Search Organizations*

2. In the organizational model display, select the line with the relevant position according to the sample organizational model and choose Employee:

CODE	Description	Comment: Hierarchy Level	Object Type
ICNT_1_SUP	1st Level Support	2	Service Team
P_IC_SRV	IC Service Agent	3	Position
	Ann Anderson	4	**Employee**
ICNT_2_SUP	2nd Level Support	2	Service Team

CODE	Description	Comment: Hierarchy Level	Object Type
P_IC_SUP	IC Support Agent	3	Position
	Peter Best	4	**Employee**

3. Search for and select the relevant employee.

4. Save your settings.

3.3 Workflow Settings

3.3.1 Defining Prefix Number

Purpose

As a prerequisite for defining determination rules, you first must define a prefix number for Workflow and organizational management.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

Transaction code	OOW4
SAP IMG Menu	*SAP NetWeaver → Application Server → Business Management → SAP Business Workflow → Basic Settings (Organization Management) → Edit Prefix Numbers*

2. First, check if the following data record has already been created in the system.

Field Name	Field Value
Prefix number	A number between 900 and 999 (customer namespace) (for example, `900`)

Field Name	Field Value
SAP System ID	**ID of your CRM system**
Client ID	**Number of your CRM client**

Column Name	User Action and Values
Status	**Active**
Prefix no.	A number between 900 and 999 (customer namespace) (for example, **900**)
SAP System	**ID of your CRM system**
Client	Number of your CRM client
Package	**$TMP**

3. If not, choose *Display <-> Change*.

4. Choose *Create*. and on the *Detail View of Prefix Number: Create* dialog box maintain the following entries:

Field Name	Field Value
Prefix number	A number between 900 and 999 (customer namespace) (for example, **900**)
SAP System ID	**ID of your CRM system**
Client ID	**Number of your CRM client**

5. Choose *Save*.

6. On the *Create Object Directory Entry* dialog box, choose *Local Object* Then choose *Continue*.

3.3.2 Maintaining Workflow User for ERMS

Purpose

Prerequisites

System users must have appropriate authorization roles (PFCG roles) assigned. You can find the standard PFCG roles with specific ERMS authorizations in the Procedure below. For additional authorizations, refer to the following SAP note: 2597668.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:In this step you create a Workflow user that is used within the E-Mail Response Management System (ERMS).

Transaction code	SU01
SAP Menu	*Tools → Administration → User Maintenance → Users*

2. On the *User Maintenance: Initial Screen*, as *User* enter **`SAP_WFRT`**. If this user does not yet exist, proceed as follows:

3. Choose *Create (F8)*.

4. On the *Maintain Users* screen, maintain the following entries:

Field Name	User action and values
Address Data	
Last name	**`SAP_WFRT`**
Logon Data	
User Type	**`System`**
Initial password	**`Initial1`**
Repeat password	**`Initial1`**
Roles	
Role	**`SAP_BC_BMT_WFM_SERV_USER`** **`SAP_BC_BMT_WFM_SERV_USER_PLV01`**

5. Save your entries.

3.3.3 Adapting System User

Purpose

The password for the new system users is still an initial value. With this activity, you change the initial password of each of the new system users with the first system logon.

Note

For recommendations regarding security for system users please see: http://help.sap.com → *Search for: SAP Netweaver* → *SAP NetWeaver* → *SAP NetWeaver7.5* → *Implement: SAP NetWeaver Security Guide* → *SAP NetWeaverSecurity Guide*

Procedure

Log on to the SAP S/4HANA system with the newly created user and change the initial password <Initial1> to the new productive password.

3.3.4 Performing Automatic Workflow Customizing

Purpose

In this step you perform automatic Workflow customizing for the E-Mail Response Management Workflow. The Workflow settings enable the handling of incoming e-mails.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

Transaction code	SWU3
SAP Menu	*Tools* → *ABAP Workbench* → *Development* → *SAP Business Workflow* → *Utilities* → *Automatic Workflow Customizing*

2. On the *SAP S/4HANA: Automatic Workflow Customizing* screen, choose *Perform Automatic Customizing (F9)* for the runtime environment.

   Note

   The *Perform Automatic Customizing (F9)* option is only available if this step has not been executed before.

3. Save your settings.

3.3.5 Activating Workflow Events and Tasks

Purpose

In this step you activate Workflow events and tasks for the E-Mail Response Management System (ERMS). This enables the routing of e-mails via Workflow.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

Transaction code	CRM_ERMS_WF_CUST
SAP Menu	*Service → Interaction Center → E-Mail Response Management System → Settings → Assign Agent for E-Mail Handling*

2. On the *Task Customizing Overview* screen, for the ERMS application component choose *Activate event linking*.
3. On the *Event Linkage: Triggering events* screen, expand the *Tasks/Events* tree.
4. The *ERMSSUPRT2MAILRECEIVED* event linkage must be displayed as *Activated*. If that is not the case, choose the *Detail view*. If required, select a customizing transport request.
5. On the *Properties of Event Linkage* dialog box, choose the *Event linkage activate* option, keep the system defaults for the other options, then choose *Continue*.
6. Choose *Back*.
7. On the *Task Customizing Overview* screen, for the ERMS application component choose *Assign Agents*.
8. On the *Task Group: Maintain Agent Assignment* screen, expand the tree.
9. To define the ERMS decision as general task, select the ID *TS 00207914* and choose *Attributes...*
10. On the *Task* dialog box, choose *General Task*, then choose *Transfer*.

3.4 Multi-Level Categorization

3.4.1 Defining Categorization Schema and Categories

Purpose

In this activity, you define a categorization schema with the categories that can be assigned in a service request, knowledge article, and optionally further transaction types such as service request templates, service orders and others.

Procedure

1. Sign in to the SAP S/4HANA system as a Customer Service Manager (standard business role SAP_BR_CUSTOMER_SERVICE_MGR) and choose the following navigation path:

SAP Fiori Launchpad	*Operations → Create Categorization Schema*

2. On the *Category Schema* screen, the system proposes a *Schema ID*. In the *General Data* area, overwrite the proposed schema ID and maintain the following values:

Field name	User action and values
Schema ID	**YBP_SERVICE**
Name	**BP Service**
Description	**BP Service**
Logical Structure	**Hierarchical Categorization**
Authorization Mode	**AND Combination**

3. In the *Application Areas* screen area, choose *Create New Entries* for each value combination in the table below, and maintain the following entries:

Application ID	Parameter	Value
Service Request/Incident	Transaction type / Catalog Category	Service Request / Defect Locations / Objects Parts (SRVR/D)
Rule Modeler	Context	Service Request Management
Knowledge Article	Transaction type / Catalog Category	Knowledge Article / Causes

4. Create a multi-level categorization hierarchy as depicted in the table below. To do so, in the *Category Schema* screen area select the first line with the category schema and choose *New (New Category)*.

5. In the *General Data* area, update the category ID, name and description.

6. Then either select the categorization schema again to create a category on the same level as the other category you just created. Alternatively select the newly created category to create a subordinate category.

> **i Note**
>
> You can use any category IDs. You do not need to adhere to the ones you find in the table below.
>
> Table 5: Sample Categorization Model
>
> | YBP_SERVICE - BP Service | | |
> |---|---|---|
> | | CA_1 Complaint | |
> | | | CA_4 Legal Issues |
> | | | CA_5 Packaging |
> | | | CA_6 Product |
> | | | CA_7 Others |
> | | CA_2 Compliment | |
> | | | CA_8 Product |
> | | | CA_9 Packaging |
> | | | CA_10 Others |
> | | CA_3 Request | |
> | | | CA_11 Factory Visit |
> | | | CA_12 Information |
> | | | CA_13 Online Shop |
> | | | CA_14 Suggestion |
> | | | CA_15 Others |
> | | CA_16 Product | |
> | | | CA_17 Remote Support |
> | | | CA_18 Onsite Support |

7. Once you are done with the category maintenance, in the *Category Hierarchy* area select the first line = categorization schema ID. Then in the *General Data* area, maintain the following entries **in this sequence**:

Field name	User action and values
Valid-From Date	**Today's date**
Valid-From Time	**Current time + 5 minutes**
Status	**Released**

8. Save your settings.

Result

Once the valid-from date and time are reached, the categorization schema's status is updated to active. Once it is active, it is available for selection in the service request, knowledge article, and other application areas you defined.

3.5 Knowledge Articles

3.5.1 Creating Knowledge Articles

Purpose

In this activity, you create knowledge articles that provide answers to common problems reported by your customers. The knowledge articles can be identified by the service employees and sent to the customers via e-mail.

Procedure

1. Sign in to the SAP S/4HANA system as a Customer Service Manager (standard business role SAP_BR_CUSTOMER_SERVICE_MGR) and choose the following navigation path:

SAP Fiori Launchpad	*Operations → Create Knowledge Article*

2. Maintain the following entries:

Field	Parameter
General Data	
Language	`English`

Field	Parameter
Description	Your KA description (for example, **`Paper jam`**)
Keywords	Your KA keyword (for example, **`Printer, Paper`**)
Subject	
Category 1	**`Product`**
Notes	
Problem Description	Paper is stuck in printer
Solution Description	Open the paper tray and remove jammed sheets of paper
Assignment Block Administration	
Processing Data	
Status	**`Published`**

3. Save your settings.

4. Repeat the previous steps to create additional knowledge articles, if required.

Translation of Knowledge Article Texts (Optional)

1. To maintain the knowledge articles in different languages, navigate to *Home* → *Service Operations* → *Search: Knowledge Articles.*

2. Search and select the relevant knowledge article.

3. In the knowledge article details, choose *Edit*.

4. For *Language*, choose the relevant language.

5. Maintain the translation for the language dependent texts like *Description*, *Key Words*, *Problem Description*, and *Solution Description*.

6. Save your settings.

3.5.2 Auto-Suggesting Knowledge Articles

So that knowledge articles can be auto-suggested based on the service request's categorization, you need to assign them to the relevant category in the categorization schema, define an alert, and define a rule as described in the following sub chapters.

Prerequisites

You must have created at least one knowledge article as described in the previous chapter.

3.5.2.1 Assigning Knowledge Article to Category

Purpose

In this activity, you assign a knowledge article to a category in the categorization schema. If you have created the alert and rule as described in the next two chapters, an alert will be displayed, informing the helpdesk agent about the available knowledge article(s) that you assigned to the selected category.

Procedure

1. Sign in to the SAP S/4HANA system as a Customer Service Manager (standard business role SAP_BR_CUSTOMER_SERVICE_MGR) and choose the following navigation path:

SAP Fiori Launchpad	*Operations → Search Categorization Schemas*

2. Search for and open the *YBP_SERVICE* categorization schema.

3. On the *Categorization Schema: YBP_SERVICE* screen, choose *Edit*.

4. In the *Category Hierarchy* view, select the *Product* category.

5. For the *Product* category, in the *Knowledge Article* assignment block, choose *New*.

6. Search for and assign the knowledge article you created.

7. Save your settings.

8. Repeat these steps for all categories to which you want to assign knowledge articles.

3.5.2.2 Defining Alert for Auto-Suggest Knowledge Article

Purpose

Define the alert for the rules that are used for autosuggesting knowledge articles.

Procedure

1. Sign in to the SAP S/4HANA system as a Customer Service Manager (standard business role SAP_BR_CUSTOMER_SERVICE_MGR) and choose the following navigation path:

SAP Fiori Launchpad	*Operations → Create Alert*

2. Maintain the following values:

Field name	Value	
General Data		
Alert ID	**`AUTOSUGGESTED_KA`**	
Language	**`English`**	
Description	**`Auto Suggest Knowledge Articles`**	
Characteristics		
Navigation Object/Action	**`BT106_KA:A - Knowledge Articles: Search`**	
Theme	**`Default`**	
Message		
Attributes	Event	AutosuggestKAStart:NumberOfKA
Choose the Insert Attribute.		
Text	*[EVENT $AutoSuggestKAStart:NumberOfKA]* Suggested Knowledge Article(s)	

3. Choose *Save*.

3.5.2.3 Defining Rule Policy for Auto-Suggest Knowledge Article

Purpose

Define the rule policy and rules that are used for auto-suggesting knowledge articles.

Procedure

1.

Sign in to the SAP S/4HANA system as a Customer Service Manager (standard business role SAP_BR_CUSTOMER_SERVICE_MGR) and choose the following navigation path:

SAP Fiori Launchpad	*Operations → Create Rule Policy*

2. On the *New Rule Policy* dialog box, maintain the following entries:

Field name	User action and values
Context	**Intent Driven Interaction (IC WebClient)**
Rule Policy	`Y_AUTOSUGGEST`

3. Choose *Ok*.

4. In the *Rule Policy* details, select the *Y_AUTOSUGGEST* entry.

5. In the *Business Roles* assignment block, choose *Add Entry*, and assign the *S4C_SRV_ICAG* entry.

6. In the *IC Events* assignment block, choose *Add Entry* twice, and assign the following events:

Auto Suggest Knowledge Article Start

Auto Suggest Knowledge Article End

7. In the *Policy* assignment block, select the *Draft Rules* entry and choose *Subnode*.

8. Maintain the following values:

Field name	User action and values
Assignment block Rule Folder Details	
Name	`Autosuggested KA`
Description	`Auto Suggest Knowledge Articles`

9. In the *Policy* assignment block, keep the existing selection and choose *Subnode*.

10. Maintain the following values:

Field name	User Action and Values		
Assignment block Rule Details			
Name	**`AUTOSUGGESTED_START`**		
Description	**`Start Auto Suggest Knowledge Articles`**		
Assignment block Conditions			
Match	**Attribute**	**Operator**	**Value**
If	Current Event	Equals	**`Auto Suggest Knowledge Article Start`**
Assignment block Actions: Choose *Add Entry*			
Actions	Name	Value	Description
	Actions/Parameters		
	Trigger Alert		
	Alert Name	**`AUTOSUGGESTED_KA`**	Auto Suggest Knowledge Articles

11. In the *Policy* assignment block, select the *Draft Rules* entry and choose *Subnode*.

12. Maintain the following values:

Field name	User action and values
Assignment block Rule Folder Details	
Name	**`End Autosuggest`**
Description	**`End Auto Suggest Knowledge Article`**

13. In the *Policy*assignment block, select the rule folder *End Autosuggest* and choose *Subnode*.

14. Maintain the following values:

Field name	User action and values		
Assignment block Rule Details			
Name	**`AUTOSUGGESTED_END`**		
Description	**`End Auto Suggest Knowledge Articles`**		
Assignment block Conditions			
Match	**Attribute**	**Operator**	**Value**

Field name	User action and values		
If	Current Event	Equals	**Auto Suggest Knowledge Article End**
Assignment block Actions: Choose *Add Entry*			
Actions	Name	Value	Description
	Actions/Parameters		
	Terminate Alert		
	Alert Name	**AUTOSUGGESTED_KA**	**Auto Suggest Knowledge Articles**

15. In the *Policy* assignment block, choose *Release Draft Rules and Save*.

3.6 Inbound E-Mail Settings

If you want to enable e-mailing for the Interaction Center, implement the steps to configure e-mail for SAPconnect as described in the following IMG documentation:

Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

Transaction code	SPRO
SAP IMG Menu	*Service → Interaction Center WebClient → Basic Functions → Communication Channels → Configure E-Mail for SAPconnect*

3.6.1 Configuring SMTP (SAPconnect)

Purpose

The e-mail scenario makes use of the SMTP (Simple Mail Transfer Protocol, SAPconnect) of SAP NetWeaver. This enables e-mail exchange between the SAP S/4HANA system and your SMTP mail server.

Procedure

To enable the e-mail exchange between the SAP S/4HANA system and your SMTP mail server, the SMTP interface needs to be configured. To do so, follow the Quick Guide for SMTP Configuration for SAP S/4HANA step by step. Also maintain the following settings:

Enabling Display of E-Mails in HTML Format

Transaction code	SCOT
SAP Menu	*Tools → Business Communication → Communication → SAP connect*

1. In the menu, choose *Settings → General Parameters*.
2. Maintain the following value:

Name	Parameter Value
MULTIPART/ALTERNATIVE	**HTML**

Setting up Workflow to Route Inbound E-Mails

Transaction code	SO16
SAP Menu	*Tools → Business Communication → Communication → Office Shared office settings*

1. Navigate to the *Addressing* tab page.
2. Enable the *SAP Business Objects* option.
3. *Save* your settings.

3.6.2 Defining Receiving E-Mail Addresses

Purpose

In this step you define the incoming e-mail addresses for the agent inbox.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

Transaction code	CRMC_IC_AUIADDR
SAP IMG Menu	*Service → Interaction Center WebClient → Agent Inbox → Settings for Asynchronous Inbound Processing → Define Receiving E-Mail Addresses/Fax Numbers*

2. On the *Change View "Define Receiving E-Mail Addresses/Fax Numbers": Overview* screen, choose *New Entries* and maintain the following entries:

Address/Number	Description
SERVICE@<DOMAIN> for example, **520.XXX.R3.SAP-AG.DE**	Service

3. *Save* your settings.

3.6.3 Maintaining Inbound Processing

Purpose

In this step you specify details for inbound e-mail processing.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

Transaction code	SCOT
SAP Menu	*Tools → Business Communication → Communication → SAPconnect*

2. On the *SAP* screen, navigate to *Business Communication Administration → Settings → SMTP Connection → Inbound Messages → Inbound Processing* and verify that the following entries exist. If they should be missing, maintain them:

Communication Type	Recipient Address	Document Class	Exit Name	Call Order
Internet Mail	*	**ICS**	**CL_RMPS_PRO_MIME_HANDLING**	**1**

Communication Type	Recipient Address	Document Class	Exit Name	Call Order
Internet Mail	*	ICS	CL_RMPS_INCOMING_MAIL	2
Internet Mail	*	ICS	CL_APPOINTMENT_REPLY	3

3.6.4 Maintaining Recipient Distribution

Purpose

In this step you define the recipient determination for incoming e-mails.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

Transaction code	SO28
SAP Menu	*Service* → *Interaction Center* → *E-Mail Response Management System* → *Settings* → *Maintain Recipient Distribution*

2. On the *Inbound Distribution: Settings for Recipient Determination* screen, choose *Insert Line (F7).*
3. In the *Recipient* field, maintain the e-mail address, for example, SERVICE@520.XXX.R3.SAP-AG.DE.
4. Open the value help for the *New recipient* field.
5. In the *Selection* dialog box, choose *SAP object instance* and choose *Continue*.
6. On the *Choose Object Type* dialog box, select *ERMS support 2* and choose *Continue*.
7. On the *Find ERMSSUPRT2* dialog box, open the value help and as *ReceiverAddress* maintain a valid e-mail address, for example, **Service (SERVICE@<DOMAIN>)**.
8. *Save* your settings.

3.6.5 Defining Receiving E-Mail Settings

Purpose

Define settings for the receiving e-mail addresses. The settings include the workflow priority of the work item created, and optionally further settings.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

Transaction code	CRMC_IC_AUIGNADR
SAP IMG Menu	*Service → Interaction Center WebClient → Agent Inbox → Settings for Asynchronous Inbound Processing → Define Receiving E-Mail/Fax Settings*

2. On the *Change View "Define E-Mail/Fax Settings": Overview* screen, choose *New Entries* and maintain the following entries:

Field name	User action and values
Address / Number	**SERVICE@<DOMAIN>** for example, **520.XXX.R3.SAP-AG.DE**
Comm. Method	**INT**
Workflow Priority	**4 High**

3. Save your settings.

Result

You have defined your receiving e-mail settings.

3.6.6 Activating E-mail Editor Services

Purpose

Activate the services which are necessary to edit e-mails.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

Transaction code	SICF
SAP Menu	*Tools → Administration → Administration → Network → HTTP Service Hierarchy Maintenance*

2. Choose Execute (`F8`).
3. On the Define Services screen, in the Virtual Hosts / Services area, navigate to the following services and via right mouse-click choose Activate for them:
   - `/default_host/sap/public/bc/ui5_ui5`
   - `/default_host/sap/bc/bsp/sap/bsp_crm_rtemce`

3.7 Routing and Dispatching Rules

In the following chapters you find sample settings to route incoming e-mails and to dispatch service requests based on rules.

The first option is the default routing of incoming e-mails to a default organizational unit, for example, 1st Level Support. The employees assigned to this organizational unit will find the e-mails in the inbox, for example, by searching for open items assigned to their organizational unit.

The second option is a specific rule (or set of rules) to dispatch a service request to organizational units and/or service employees based on diverse parameters. This rule, or rule set, can be triggered by the service agent manually when choosing the *Dispatch* option in the service request.

> **Note**
>
> If you want to define a set of rules, define all relevant rules individually. Then for the relevant rule policy, in the *Actions* assignment block, add the *Invoke Policy* action and assign the subordinate rule to the rule policy. Repeat this for all rules you want to assign to the superordinate rule policy.

3.7.1 E-Mail Routing

3.7.1.1 Defining Rule for Routing of Incoming E-Mail

Purpose

In this activity you create a rule to route incoming e-mails to a specific organizational unit, in the example below, to the 1st Level Support organizational unit. The employees of the service team can pick up the e-mails in the agent inbox.

Prerequisites

The organizational unit which should receive the incoming e-mails has been defined.

The incoming e-mail addresses have been defined.

Procedure

1. Sign in to the SAP S/4HANA system as a Customer Service Manager (standard business role SAP_BR_CUSTOMER_SERVICE_MGR) and choose the following navigation path:

SAP Fiori Launchpad	*Operations → Create Rule Policy*

2. On the *New Rule Policy* dialog box, maintain the following values:

Field Name	User Action and Values
Context	E-Mail Response Management System
Rule Policy	`YBP_MAIL_RSP`

3. Choose *Ok*.
4. In the *Policy* area, select the *Active* entry.
5. In the *Policy Variant Details* area, as *Description* maintain **BP Default E-Mail Routing.**
6. In the *Policy* area, select the *Draft Rules* entry and choose *Subnode*.

7. Maintain the following values:

Field name	User action and values
Assignment block Rule Folder Details	
Name	**`YBP_MAIL_RSP`**
Description	**`BP Default E-Mail Routing`**

8. In the *Policy* area, keep the existing selection and choose *Subnode* to maintain the rule details.
9. Maintain the following values:

Field name	User Action and Values		
Assignment block Rule Details			
Name	**`Route E-Mail`**		
Description	**`Routing for E-Mail`**		
Assignment block Conditions. Choose *Add Entry*			
Match	**Attribute**	**Operator**	**Value**
If	E-Mail Original Recipient	Contains	SERVICE@<DOMAIN> for example, 520.XXX.R3.SAP-AG.DE
Assignment block Actions: Choose *Add Entry*			
Actions	**Name**	**Value**	**Description**
	Actions/Parameters		
	Route EMail		
	Organizational Object	<O XXXXXXXX> (search the relevant organizational unit via value help)	1st Level Support

10. In the *Policy* assignment block, choose *Release Draft Rules and Save*.

3.7.1.2 Adjusting Service Manager Profile

Purpose

Service manager profiles determine which services and related properties are executed or performed, and in what sequence, when called by the service manager. In this step, for the RE_RULE_EXEC service in the DEFAULT service manager profile, you maintain the rule policy name that you have created in the previous step.

> **Note**
>
> If you want to add new services and properties, or remove existing services, copy the DEFAULT profile and customize your own service manager profile according to your needs.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

Transaction code	SPRO
SAP IMG Menu	*Service → E-Mail Response Management System → Service Manager → Define Service Manager Profiles*

2. On the *Change View "Define Service Manager Profiles": Overview* screen, select the *DEFAULT* service manager profile, and in the *Dialog Structure* navigate to *Directly Called Services*.
3. On the *Change View "Directly Called Services": Overview* screen, select the *RE_RULE_EXEC* entry, and in the *Dialog Structure* navigate to *Properties*.
4. On the *Change View "Properties": Overview* screen, for the *POLICY* property ID, maintain **`the following entry`**:

Property ID	Property Value
POLICY	**`YBP_MAIL_RSP`**

5. Save your settings.

3.7.1.3 Assigning Service Manager Profile

Purpose

In this activity you assign the *DEFAULT* service manager profile to the incoming e-mail addresses.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

Transaction code	SPRO
SAP IMG Menu	*Service → E-Mail Response Management System → Service Manager → Assign Service Manager Profiles*

2. On the *Change View "Assign Service Manager Profiles": Overview* screen, choose *New Entries* and maintain the following entries:

Address/ Number	Object ID	Service Mgr Profile
`SERVICE@<DOMAIN> for example, 520.XXX.R3.SAP-AG.DE`	207915 (ERMS rule execution)	DEFAULT

3. Save your settings.

3.7.1.4 Generating Rule for Routing of Incoming E-Mail

Purpose

In this activity you execute a program that generates the rule for routing of incoming e-mail.

> **Note**
>
> In the following procedure it is described how to generate the rule for the previously created rule policy YBP_MAIL_RSP. If you have created rule policies with different IDs, generate the rules for these policies accordingly.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

Transaction code	`SE38`
SAP Menu	*Tools → ABAP Workbench → Development → ABAP Editor*

2. On the *ABAP Editor: Initial Screen* screen, in the Program field maintain `CRM_ERMS_REGEN_RULES`.

3. Choose *Execute (F8)*.

4. On the *Regenerate Rules* screen, maintain the following entries:

Field name	Value
Context	`ERMS`
Policy	`YBP_MAIL_RSP`
Regenerate Only Active Version	`Selected`
Verbose	`Selected`

5. Choose *Execute (F8)*.

3.7.2 Service Request Dispatching

3.7.2.1 Defining Dispatching Rule for Service Request

Use

In this activity you create the rules that are used for the dispatching of service requests by using the *Dispatch* button in the service request.

> **i Note**
>
> Since we cannot predict which transactions and parameters are available in the customer system, the sample rule described below is very simple: Whenever the *Dispatch* option is chosen in a service request of type SRVR, the employee responsible is removed and the 2nd Level Support organizational unit is maintained as responsible service organization. Decide based on your requirements and available data whether to define more refined rules.

Prerequisites

The organizational unit to which the service requests should be assigned has been defined.

Procedure

1. Sign in to the SAP S/4HANA system as a Customer Service Manager (standard business role SAP_BR_CUSTOMER_SERVICE_MGR) and choose the following navigation path:

SAP Fiori Launchpad	*Operations → Create Rule Policy*

2. On the *New Rule Policy* dialog box, maintain the following values:

Field name	User action and values
Context	Service Request Management
Rule Policy	<YBP_SERVR_ROUTIN>

3. Choose *Ok*.

4. In the *Policy* area, select the *Active* entry.

5. In the *Policy Variant Details* area, as *Description* maintain **BP Service Request Dispatching.**

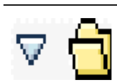
6. In the *Policy* area, select the *Draft Rules* entry and choose *Subnode*.

7. Maintain the following values:

Field name	User action and values
Assignment block Rule Folder Details	
Name	**`YBP_SERVR_ROUTIN`**
Description	**`BP Service Request Dispatching`**

8. In the *Policy* area, keep the existing selection and choose *Subnode*.

9. Maintain the following values:

Field name	User action and values		
Assignment block Rule Details			
Name	**`YBP_SERVR_ROUTIN`**		
Description	**`BP Service Request Dispatching`**		
Assignment block Conditions			
Match	Attribute	Operator	Value
If	Transaction Type	Equals	Service Request
Assignment block Actions: Choose *Add Entry* twice			
Actions	**Name**	**Value**	**Description**
	Actions/Parameters		

Field name	User action and values		
	Delete partner		
	Partner Function	00000014: Employee Respon-sible	Auto Suggest Knowledge Arti-cles
	Condition	If not in Org. Unit	
	Route to group		
	Group	O:500000XX	2nd Level Support

10. In the *Policy* assignment block, choose *Release Draft Rules and Save*.

Result

You have defined a new rule for dispatching a service request to the relevant organization.

3.7.2.2 Defining Service Manager Profile for Service Request Dispatch

Purpose

Service manager profiles determine which services and related properties are executed or performed, and in what sequence, when they are called by the service manager.

In the ERMS context, the service manager is integrated with business workflow.

The policy name assigned in the service manager profile must be the same as you created in the *Defining Dispatching Rule* chapter.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

Transaction code	SPRO

SAP IMG Menu	*Service → E-Mail Response Management System → Service Manager → Define Service Manager Profiles*

2. On the *Change View "Define Service Manager Profiles": Overview* screen, select the *SAP_SRQMROUTING (SAP Service Request Routing)* profile and choose *Copy As... (F6)*.

3. On the *Change View "Define Service Manager Profiles": Details of Selected Set* screen, maintain the following values, then choose *Enter*:

Field	Value
Srv Mgr Profile	YBP_SERVR_ROUTIN
Description	BP Service Request Routing

4. On the *Specify object to be copied* dialog box, choose *copy all*.

5. On the *Information* dialog box, choose *Continue (Enter)*.

6. On the *Change View "Define Service Manager Profiles: Overview* screen, select the YBP_SERVR_ROUTIN entry, and in the *Dialog Structure* navigate to *Directly Called Services*.

7. On the *Change View "Directly Called Services": Details* screen, make sure that the Service ID: SRV_REQ_RULE_EXE is displayed. Then in the *Dialog Structure* navigate to *Properties*.

8. On the *Change View "Properties": Overview* screen, maintain the following values:

Properties	
Property ID	**Property Value**
CONTEXT	SERVICEREQUEST
POLICY	YBP_SERVR_ROUTIN

9. Save your settings.

Result

You have created a service manager profile for dispatching.

3.7.2.3 Assigning Service Manager Profile to Transaction Type

Purpose

1. Assign the service manager profile to the service request transaction type.

Procedure

2. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

Transaction code	SPRO
SAP IMG Menu	*Service → Transactions → Additional Settings → Assign Dispatching Rule Profile to Transaction Types*

3. On the *Change View "Assign Service Manager Profiles": Overview* screen, maintain the following entries:

Transaction Type	Service Mgr Profile
SRVR	**YBP_SERVR_ROUTIN**

4. Save your settings.

3.8 Outbound E-Mail Settings

3.8.1 Setting Up Background Job for E-Mails

Purpose

In this activity you define a background job for the *RSCONN01* report to send out e-mails.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user and choose the following transaction code:

Transaction code	SM36
SAP Menu	*Tools → CCMS → Background Processing → Define Job*

2. On the *Define Background Job* screen, choose *Job Wizard*.

3. On the *Create a job* dialog box, choose *Continue*.

4. On the *General job information* screen, maintain the following values:

Field name	Value
Job Name	**`YBP_EMAIL_SEND_520`**

5. Choose *Continue*.

6. On the *Job definition: Job step* screen, choose *ABAP program step* and *Continue*.

7. On the *ABAP program step* screen, maintain the following values, then choose *Continue*:

Field name	Value
ABAP program name	**`RSCONN01`**
Variant	**`SAP&CONNECTALL`**
Execution language	**`EN (English)`**

8. On the *Multi-step option* screen, choose *Continue* without adding additional steps.

9. On the *Spool List Recipient* screen, choose *Continue*.

10. On the *Job definition: Start conditions* screen, as start condition specify *Date/Time* , then choose *Continue*.

11. On the *Def inition of start at date/time* screen, maintain a *Scheduled start* date and time, for example, today's date with a time in the future.

12. In the *Periodic jobs* screen area, choose the *Period* option, then choose *Continue*.

13. On the *Period definition* screen, choose *None of the above*.

14. Choose the *Other Periods* option.

15. On the *Other Period Definition* dialog box, maintain **`5 minute(s)`**, then choose *Create*.

16. Back on the *Period definition* screen, choose *Continue*.

17. On the *Set job* screen, check your entries and then choose *Complete*.

Result

The system sends out queued e-mails automatically every 5 minutes.

3.8.2 Defining Outgoing E-Mail Address Group

Purpose

In this activity you define the e-mail address group for outgoing e-mails in the Interaction Center.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user choose the following navigation path:

Transaction code	SPRO
SAP IMG Menu	*Service → Interaction Center WebClient → Basic Functions → Communication Channels → Define Outgoing E-Mail Address Groups*

2. On the *Change View "Define Outgoing E-Mail Address Groups": Overview* screen, choose *New Entries* and maintain the following entries:

Field name	User action and values
Address Group	Address/Number
`YBP_EMAIL_SRV`	**SERVICE@<DOMAIN>** for example, **520.XXX.R3.SAP-AG.DE**

3. Save your settings.

> **Note**
>
> To identify the correct domain, call transaction SCOT, and from the menu, choose *Settings* › *Default Domain*.

> **Note**
>
> Check SAP Note 455140 Central Information for correct format of domain (for example: Internal SAP Germany server: 577.QRU.R3.SAP-AG.DE) (577 → System client; QRU →System ID).

3.8.3 Maintaining Attribute Contexts for Mail Forms

Purpose

So that you can insert a service request tracking attribute in an e-mail form, first maintain the structures for the ERMS (Email Response Management) attribute context. In the procedure below all standard structures are defined. For the service request tracking attribute at least the structure CRMS_ERMS_SCENARIO_FIELDS with field SERVICE_REQ_TRACKING_TEXT must be defined.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user choose the following navigation path:

Transaction code	SPRO
SAP IMG Menu	*Service → Interaction Center WebClient → Basic Functions → Communication Channels → Maintain Attribute Contexts for Mail Forms*

2. On the *Change View "Attribute Contexts": Overview* screen, select the *ERMS* attribute context. Then in the *Dialog Structure* navigate to *Structure*.

3. On the *Change View "Structure": Overview* screen, choose *New Entries* and maintain the following entries:

Structure Name	All Fields
CRMS_ERMS_AGENT_DATA	X
CRMS_ERMS_ESC_FIELDS	X
CRMS_ERMS_SCENARIO_FIELDS	X
CRMS_ERMS_SR_ACCOUNT	X
CRMS_ERMS_SR_STKT	X

4. Save your settings.

3.8.4 Creating Standard E-Mail Template

Purpose

In this activity you create a sample e-mail template. Templates are used by the helpdesk agents to provide standardized answers.

Procedure

1.

Sign in to the SAP S/4HANA system as a Customer Service Manager (standard business role SAP_BR_CUSTOMER_SERVICE_MGR) and choose the following navigation path:

SAP Fiori Launchpad	*Operations → Create E-Mail Template*

2. On the *Mail Form: New* screen, in the *General Data* area maintain the following entries:

Field name	User action and values
ID	**`YBP_REQUEST`**
Description	**`BP E-Mail Service Request`**
Subject	Your Request
Language	Original: English
Usage	Internet Mail (HTML)
Attribute Context	Email Response Management

3. In the *Text Element* area, maintain a default text for the e-mail template, for example:

`Dear Customer,`

`thank you for contacting our service desk.`

`Best regards,`

`Your company’s signature`

4. Place the cursor at the bottom of the text area and choose *Attribute*.

5. On the *Insert Attributes* dialog box, select *Attribute Category: Additional Attributes*.

6. Select the *Service Request Tracking Text* attribute and choose *Insert*.

7. Save your settings.

Result

You have created a sample e-mail template. If you use this e-mail template to reply to an e-mail with reference to a service request, the service request ID will be inserted automatically in the outgoing e-mail.

3.8.5 Defining Standard Response Group

Purpose

Define a standard response group with templates that can be used by agents when sending e-mails. For the SAP Best Practices content, we describe how to create one pre-defined e-mail form. If you define several e-mail forms and want to offer them as standard responses, copy the YBP_RESP_GRP entry described below and assign the other e-mail forms to it as well.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

Transaction code	SPRO
SAP IMG Menu	*Service → Interaction Center WebClient → Basic Functions → Communication Channels → Define Standard Response Groups*

2. On the *Change View "Define Standard Response Groups": Overview* screen, choose *New Entries* and maintain the following values:

Std Response Group	Form Name
YBP_RESP_GRP	**`YBP_REQUEST` (the name of the form you created in the previous chapter)**

3. Save your settings.

Result

A new standard response group YBP_RESP_GRP has been created and can be assigned to the proper e-mail profile. The responses appear in the e-mail screen of the helpdesk agent.

3.8.6 Defining E-Mail Profile

Purpose

Define the e-mail profile for sending out e-mails.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

Transaction code	SPRO
SAP IMG Menu	*Service → Interaction Center WebClient → Basic Functions → Communication Channels → Define E-Mail Profiles*

2. On the *Change View "Define E-Mail Profiles": Overview* screen, choose *New Entries* and maintain the following entries:

Field name	User action and values
Profile ID	**YBP_EMAIL_SRV**
Description	**BP E-Mail Profile Service**
Outgoing Addr. Group	**YBP_EMAIL_SRV**
Customer Address	**All**
Contact Person Address	**Default**
Contact Relation Address	**None**
Attachment Maximum Size	**600000**
X-Mailer	**SAP IC WEB CLIENT V1.0**
MIME Version	**1.0**
Reply To Address	**SERVICE@<DOMAIN> example, 520.XXX.R3.SAP-AG.DE**
Errors To Address	**SERVICE@<DOMAIN> example, 520.XXX.R3.SAP-AG.DE**
Comments	Leave empty
Print Form Name	**CRM_IC_APPL_MAIL_SIMPLE**
Std Response Group	**YBP_RESP_GRP**
Tracking Text Form	**YBP_REQUEST**

Field name	User action and values
Disp. HTML Mail	**Enabled**
Tracking Text on Reply	**Selected**
Failure Notification	**Selected**
Show Info Messages	**Selected**
Success Notification	**Not selected**

3. Save your settings.

3.8.7 Assigning E-Mail Profile to Business Role

Purpose

In this activity you assign the e-mail profile created above to the relevant business role. Per default we assume that you use the SAP standard business role **S4C_SRV_ICAG (Service IC Agent)** role. If you have created your own business role, assign the e-mail profile to your own business role.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

Transaction code	SPRO
SAP IMG Menu	*Service* > *UI Framework* > *Business Roles* > *Define Business Role*

2. On the *Change View "Define Business Roles": Overview* screen, select the *S4C_SRV_ICAG* business role and in the Dialog Structure navigate to *Assign Function Profiles*.

3. On the *Change View "Assign Function Profiles": Overview* screen, maintain the following entries:

Function Profile ID	Profile Value	Description
EMAIL	**YBP_EMAIL_SRV**	**E-Mail**

4. Save your settings.

3.9 Agent Inbox Settings

3.9.1 Updating Inbox Index

Purpose

In this activity you update the index for Inbox-specific searches.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

Transaction code	CRM_IC_INDEX_LOAD
SAP Menu	*Service → Interaction Center → Interaction Center WebClient → Administration → Agent Inbox → Process Data for Inbox-Specific Searches*

2. On the *Process Data for Inbox-Specific Searches* screen, in the *Inbox Item Type* drop-down list box, select the available entries one after the other.

3. Per selected inbox item type, different categories are displayed.

4. If the status for the relevant categories is *Not Started*, select these categories one after the other and choose *Update*.

5. On the *Load Work Item Data for Accelerated Search* screen, keep the system default values and choose *Execute (F8)*.

6. Navigate *Back* to the *Process Data for Inbox-Specific Searches* screen and repeat the report execution for all relevant categories.

3.9.2 Defining Recipient Profile

Purpose

You use the recipient profile in the agent inbox to define the recipients to which documents can be forwarded to. The values defined will be available in a drop-down list. Recipients can be, for example, responsible employees or service organizational units.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

Transaction code	**CRMC_IC_AUI_FWD**
SAP Menu	*Service → Interaction Center → Interaction Center WebClient → Administration → Agent Inbox → Forwarding → Define Recipient Profile for Forwarding*

2. On the *Change View "Define Recipient Profile for Forwarding": Overview* screen, choose *New Entries* and maintain the following entries:

Field name	Value
Forward To	**YBP_01**
Receiving BP	Select the proper business partner number (for example, INT_CNT Interaction Center - ID of organizational unit *Interaction Center)*
Description	**enter a description** (for example, `Interaction Center`)

3. Save your settings.

3.9.3 Assigning Recipient Profile

Purpose

In this activity you assign the recipient profile to an inbox profile.

Prerequisite

Per default you use the pre-delivered business role S4C_SRV_ICAG (Service IC Agent). To check which inbox profile is assigned to this business role, or to another business role you want to use instead, navigate to the following SAP IMG Menu: *Service → UI Framework → Business Roles → Define Business Role*.

In the *Change View: "Define Business Roles": Overview* screen, select the relevant business role, and in the *Dialog Structure* choose *Assign Function Profiles*.

Remember the profile value assigned to the IC_INBOX function profile ID, for example, DEFAULT - 2, and use it in the following procedure.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

Transaction code	**CRMC_IC_AUI_PRO_FWD**
SAP Menu	*Service → Interaction Center → Interaction Center WebClient → Administration → Agent Inbox → Forwarding → Assign Recipient Profile for Forwarding To Inbox Profile*

2. On the *Change View "Assign Recipient Profile for Forwarding to Inbox Profile"* screen, maintain the following entries:

Field name	Value
Inbox Profile	**DEFAULT - 2 (Default settings with E-Mail)** (or the profile you use in the relevant business role)
Forward To	**YBP_01**
Description	**<taken automatically from the definition>**
Sort	**10**

3. Save your settings.

Result

If you select a transaction in the Inbox and choose *Forward* › *Interaction Center*, the system updates the service organization in the transaction to *Interaction Center*.

3.9.4 Defining Quick Search

Purpose

In this activity you create a quick search for the Inbox that you can then assign to an inbox profile. The quick search contains predefined search parameters so that service desk agents do not have to maintain these search parameters manually anymore. You can define multiple quick searches for an inbox profile.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

Transaction code	CRMC_IC_AUI_QUICKS
SAP Menu	*Service → Interaction Center → Interaction Center WebClient → Administration → Agent Inbox → Define Quick Searches*

2. On the *Change View "Define Quick Searches": Details* screen, choose *New Entries* and maintain the following entries:

Field name	Value
Quick Search	**0001**
Description	**My Group's Open Items**
Assigned To	**My Groups**
Status	**0004 (Not Completed)**

3. Save your settings.

3.9.5 Assigning Quick Search to Inbox Profile

Purpose

In this step you assign the quick search that you defined in the previous step to an inbox profile.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

Transaction code	SPRO
SAP IMG Menu	*Service → Interaction Center WebClient → Agent Inbox → Define Inbox Profiles*

2. On the *Change View "Define Inbox Profiles": Overview* screen, select the *DEFAULT - 2 (Default settings with E-Mail)* inbox profile, and in the *Dialog Structure* navigate to *Assign Quick Searches*.

3. On the *Change View "Assign Quick Searches": Overview* screen, choose *New Entries.*

4. On the *New Entries: Overview of Added Entries* screen, maintain the following values:

Field name	User action and values
Quick Search	**0001**
Description	**My Group's Open Items**
Sort	**01**
Default Quick Search	**Select this option; if you assign more than one quick search, select it for only one of the assigned quick searches.**

5. If you have created more than one quick search, assign all relevant quick searches to the inbox profile.

6. Save your settings.

3.10 Equipment Settings for Account Identification

Purpose

If you want to identify a piece of equipment during account identification, the equipment must be assigned to the appropriate account. The procedure below describes how to assign an existing account to an existing piece of equipment. The equipment you use has either been created automatically as part of the SAP Best Practices content, or you have created it manually.

> **i Note**
>
> For manual creation of equipment, refer to the *Create Plant Maintenance Master Data* (3U3) master data script.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

Transaction code	IE02
SAP Menu	*Logistics → Plant Maintenance → Management of Technical Objects → Equipment → Change*

2. On the *Change Equipment: Initial* screen, in the *Equipment* field, search for an existing piece of equipment via value help. For example, search with *Equipment by equipment list* and enter the search criterion *Equipment category: S (Customer Equipment)*. If the SAP Best Practices content has been activated, you should find a piece of equipment called *Printer Professional ABC*.

3. On the *Change Equipment: Initial* screen, enter the equipment ID and then choose `Enter`.

4. On the *Change Equipment: General Data* screen, navigate to the *Customer data* tab page.

5. In the *Partners* screen area, maintain the following entries:

Field name	User action and values
Funct	**Sold-To Party**
Partner	**Business Partner (Account) ID, for example, 17100001 (Domestic US Customer 1)**

6. Save your entries.

Result

In the Interaction Center, after having identified and confirmed the account, you can find the assigned equipment in the *Account Identification* view.

3.11 Service and Response Profiles

3.11.1 Create Service Profiles

Purpose

A service profile defines the period in which the services that were defined in the service contract can be carried out. In this procedure, you create two sample service profiles (5x10 and 7x24) that you can use when creating service products.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

Transaction code	`CRMD_SERV_SLA`
SAP Menu	*Service* › *Service Processes* › *Maintain Availability and Response Times*

2. On the *Display View "Service Profile": Overview* screen, choose *Display* › *Change (Ctrl+F1)*.

3. On the *Change View "Service Profile": Overview* screen, choose *New Entries* and maintain the following entries:

Field Name	User Action and Values
Serv Prof.	**`5x10`**
Description	**`Mo-Fr: 7-17 h`**

4. Choose `Enter`.

5. To maintain availability times for the newly created service profile, choose the Availability Times button (right column).

6. On the Availability Times for Schema screen, maintain the following entries:

Field Name	User Action and Values
Rule	**`Weekly periodic Availability Times`**
Week Rule	**`Every week on`** **`Select Mo, Tu, We, Th and Fr`**. For each of the selected days, maintain: **`From 07:00 – 17:00 Hrs`**
Exceptions	Not on non-working days
Factory Calendar	International

7. Choose *Copy*.

8. Save your settings, then choose *Back*.

9. To create a second service profile, on the *Change View "Service Profile": Overview* screen choose *New Entries* and maintain the following entries:

Field Name	User Action and Values
Serv Prof.	**`7x24`**
Description	**`Mo-Su: 0-24 h`**

10. Choose `Enter`.

11. To maintain availability times for the newly created service profile, choose the Availability Times button (right column).

12. On the *Availability Times for Schema* screen, maintain the following entries:

Field Name	User Action and Values
Rule	`Daily periodic Availability Times`
Daily	`All: 1 Days` `From: 00:00 To 24:00 (Central Europe)`.
Exceptions	No exceptions
All Days Are Working Days	Selected

13. Choose *Copy*.

14. Save your settings.

3.11.2 Create Response Profiles

Purpose

A response profile defines the response time of the technician, in other words, the time by which the technician must start the service laid down in the service transaction item as well as the period in which the service must be completed. In this procedure, you create two sample response profiles (First and Standard) that you can use when creating service products.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

Transaction code	`CRMD_SERV_SLA`
SAP Menu	*Service* › *Service Processes* › *Maintain Availability and Response Times*

2. On the *Display View "Service Profile": Overview* screen, choose *Display* › *Change (Ctrl+F1)*.

3. In the Dialog Structure, double-click *Response Profile*.

4. On the *Change View “Response Profile”: Overview* screen, choose *New Entries* and maintain the following entries:

Field Name	User Action and Values
Response Prof.	FIRST
Description	First Level Response Time
Priority	Selected

5. In the *Dialog Structure*, double-click *Indicators for Response Times*.

6. On the *Change View “Indicators for Response Times”: Overview* screen, choose *New Entries*.

7. In the *Priority* column of the *Indicators for Response Times* table, select the following values via value help, then choose `Enter`:

Priority	Description
1	Very High
3	High
5	Medium
9	Low

8. To assign response times per priority, select one of the priorities, then in the *Dialog Structure* double-click *Response Times*.

9. On the *Change View “Response Times”: Overview* screen, choose *New Entries* and maintain the relevant entries per priority in the *Response Times* table. After completing the entries for one priority, double-click Indicators for Response Times in the dialog structure, then select the next priority and repeat the steps as described above until you have maintained response times for all priorities.

Priority 1 (Very High)

Name of Duration	Duration Value	Time Unit
SRV_RF_DURA	**1**	**HOUR**
SRV_RR_DURA	**2**	**HOUR**

Priority 3 (High)

Name of Duration	Duration Value	Time Unit
SRV_RF_DURA	**2**	**HOUR**
SRV_RR_DURA	**8**	**HOUR**

Priority 5 (Medium)

Name of Duration	Duration Value	Time Unit
SRV_RF_DURA	**1**	**DAY**
SRV_RR_DURA	**3**	**DAY**

Priority 9 (Low)

Name of Duration	Duration Value	Time Unit
SRV_RF_DURA	**2**	**DAY**
SRV_RR_DURA	**5**	**DAY**

10. To save the response profile, choose *Save* (CTRL+S).

11. To create a second response profile, choose *Back* (F3) two times.

12. On the *Change View "Response Profile": Overview* screen, choose *New Entries* and maintain the following entries:

Field Name	User Action and Values
Response Prof.	STANDARD
Description	Standard Level Response Time
Priority	Selected

13. In the *Dialog Structure*, double-click *Indicators for Response Times*.

14. On the *Change View "Indicators for Response Times": Overview* screen, choose *New Entries*.

15. In the *Priority* column of the Indicators for Response Times table, select the following values via value help, then choose `Enter`:

Priority	Description
1	Very High
3	High
5	Medium
9	Low

16. To assign response times per priority, select one of the priorities, then in the *Dialog Structure* double-click *Response Times*.

17. On the *Change View "Response Times": Overview* screen, choose *New Entries* and maintain the relevant entries per priority in the Response Times table. After completing the entries for one priority, double-click Indicators for *Response Times* in the dialog structure, then select the next priority and repeat the steps as described above until you have maintained response times for all priorities.

Priority 1 (Very High)

Name of Duration	Duration Value	Time Unit
SRV_RF_DURA	**2**	**HOUR**
SRV_RR_DURA	**8**	**HOUR**

Priority 3 (High)

Name of Duration	Duration Value	Time Unit
SRV_RF_DURA	**8**	**HOUR**

Name of Duration	Duration Value	Time Unit
SRV_RR_DURA	24	HOUR

Priority 5 (Medium)

Name of Duration	Duration Value	Time Unit
SRV_RF_DURA	2	DAY
SRV_RR_DURA	7	DAY

Priority 9 (Low)

Name of Duration	Duration Value	Time Unit
SRV_RF_DURA	7	DAY
SRV_RR_DURA	14	DAY

18. To save the response profile, choose *Save* (CTRL+S).

3.12 Accessing the Interaction Center via Fiori Launchpad

Use

After having assigned a suitable business role to a user, for example, S4C_SRV_ICAG (Service IC Agent), the Interaction Center's WebClient UI is accessed via URL. The URL can be generated by using the transaction code WUI. Application users only need access to this URL.

If your UI strategy for application users is that all applications shall be accessed from the SAP Fiori launchpad, create a custom Fiori tile with which the Interaction Center's URL can be launched. The following steps outline what you need to do to create such a custom Fiori tile and how to assign it to the relevant users.

> **i Note**
>
> Note that the steps below have not been tested as part of this SAP Best Practices solution and might not be complete. If you use the SAP Fiori launchpad, consult the SAP Fiori expert in your organization before implementing these steps.

Prerequisites

1. Ensure that the basic setup of the SAP Fiori launchpad is complete. You can find extensive documentation about SAP Fiori here: https://help.sap.com/fiori.

2. Ensure that you have an administration user available to execute the SAP Fiori configuration steps in the Launchpad Designer.
3. Learn how to create a catalog, group, tile and target mapping, as described in the SAP Fiori Launchpad administration guide that you find here: https://help.sap.com/viewer/product/SAP_NETWEAVER_AS_ABAP_752/7.52.2/en-US → UI Technologies in SAP NetWeaver → SAP Fiori Launchpad → Administration Guide → Setting Up Launchpad Content → Best Practices for Managing Launchpad Content.

Procedure

1. Log on to the Fiori Launchpad Designer as an administration user.
2. Create a Fiori catalog, for example, with the following values:

Table 6:

Field Name	User action and values
Title	`S4 Interaction Center`
ID	`Z_BC_S4IC`

> **i Note**
>
> Alternatively, if you have already created a catalog for custom tiles, you can reuse the existing catalog.

3. In the catalog, create a new tile with the following parameters:

Table 7: Type of tile: App Launcher – Static

Field Name	User action and values
Title	`Interaction Center`
Subtitle	`Launch Interaction Center`
Icon	Select one of the available icons
User semantic object navigation	`X`
Semantic Object	`Shell`
Action	`launchRole`
Parameters	`saprole=S4C_SRV_ICAG` (or your custom business role for Interaction Center)

4. In the catalog, create the following target mapping:

Field Name	User action and values
Semantic Object	**`Shell`**
Action	**`launchRole`**
Application Type	**`URL`**
Title	**`Launch Business Role`**
URL	**`/sap/bc/bsp/sap/crm_ui_start/default.htm`**
System Alias	Maintain a system alias, if relevant for your system set-up, for example: **`S4CRM`**
Device Types	Select the relevant device types, for example: **`Desktop`**
Allow additional parameters	**`X`**

5. Create a new group, for example with the following values:

Field Name	User action and values
Title	**`S4 Interaction Center`**
ID	**`Z_BCG_S4IC`**
Enable users to personalize their group	**`X`**

> **i Note**
>
> Alternatively, you can reuse an existing group.

6. Add the Interaction Center tile to the group.
7. Log on to the SAP GUI system as a configuration user.
8. Access transaction PFCG and create a new single PFCG role, for example, with the following values:

> **i Note**
>
> Alternatively, you can reuse an existing role and update it.

Field Name	User action and values
Role	**`Z_S4IC_ FLP`**
Description	**`Interaction Center in SAP Fiori Launchpad`**
Tab Menu	

Field Name	User action and values	
(+) Transaction	`SAP Fiori Tile Catalog`	

Assign Tile Catalog

Field Name	User action and values	
Catalog Provider	`X-SAP-UI2-CATALOGPAGE`	Fiori Launchpad Catalogs
Local Front-End Server	`selected`	
Catalog ID	`Z_BC_S4IC`	S4 Interaction Center
Include Applications	`de-selected`	

Tab Menu

Field Name	User action and values	
(+) Transaction	`SAP Fiori Tile Group`	

Assign Group

Field Name	User action and values	
Group ID	`Z_BCG_S4IC`	S4 Interaction Center

Tab User

User Assignments

Field Name	User action and values
User ID	`<assign the relevant application users>`

9. Save your settings.

Result: When logging on to the SAP Fiori launchpad, the users with the relevant catalog, group, tile and PFCG role assignment will find a tile to access the Interaction Center application.

3.13 Business Context Settings for Service Request

Purpose

In this activity you create a business context profile and assign it to the service request transaction type.

Procedure

1. Log on to the SAP S/4HANA system as a configuration user and choose the following navigation path:

Transaction code	SPRO
SAP IMG Menu	*Service* > *Transactions* > *Settings for Service Requests* > *Define Settings for Business Context*

2. On the *Change View "Define Object Link Types": Overview* screen, in the *Dialog Structure*, navigate to *Define Business Context Profile*.

3. On the *Change View "Define Business Context Profile": Overview* screen, choose *New Entries* and maintain the following entries:

Field Name	**User action and values**
Bus. Cntxt	`DEFAULT`
Description of Business Context Profile	`Default SAP Business Context`

4. Choose `Enter`, then select the line with the business context profile.

5. In the *Dialog Structure*, navigate to *Assign Object Link Types*.

6. On the *Change View "Assign Object Link Types": Overview* screen, choose *New Entries* and maintain the following entries:

Link Type	**Create**	**Add**	**Search**	**Keep Link**
BUS2000110	`Empty`	`Empty`	`Empty`	`Selected`
BUS2000116	`Empty`	`Empty`	`Empty`	`Selected`
BUS2000223	`Empty`	`Empty`	`Empty`	`Selected`

SOFM	**Empty**	**Empty**	**Empty**	**Empty**

7. Save your entries.

8. In the *Dialog Structure*, navigate to *Assign Profiles to Transaction Type*.

9. On the *Change View "Assign Profiles to Transaction Type": Overview* screen, choose *New Entries* and maintain the following entries:

Field Name	User Action and Values
Transaction Type	**SRVR**
Description	**Service Request**
Object Link Profile	**DEFAULT**

10. Save your entries.

4 Appendix

4.1 Ticket Component

In case of issues during the configuration, open an SAP support ticket for the following component.

Implementation Step	Component	Comment
All steps related to Organizational Model	CRM-S4-CNT or CRM-S4-MD-ORG	
All steps related to the Interaction Center	CRM-S4-IC*	
All steps related to Service Request	CRM-S4-SRV-SRQ	

4.2 Creating Custom Fiori Tile

Use

If you want to launch a Web-based application from the SAP Fiori launchpad, you can easily create a custom Fiori tile to launch the application's URL. The following steps outline what you need to do to create such a custom Fiori tile.

> **i Note**
>
> The steps below have not been tested as part of this SAP Best Practices solution and might not be complete. They are only meant as a general recommendation what you need to do and where you can find detailed documentation.

Prerequisites

1. Ensure that the basic setup of the SAP Fiori launchpad is complete. You can find extensive documentation about SAP Fiori here: https://help.sap.com/fiori.
2. Ensure that you have an administration user available to execute the SAP Fiori configuration steps in the *Launchpad Designer*.
3. Learn how to create a catalog, group, tile and target mapping, as described in the SAP Fiori Launchpad administration guide that you find here: https://help.sap.com/viewer/product/SAP_NETWEAVER_AS_ABAP_752/7.52.2/en-US → UI Technologies in SAP NetWeaver → SAP Fiori Launchpad → Administration Guide → Setting Up Launchpad Content → Best Practices for Managing Launchpad Content.

Procedure

1. Log on to the Fiori Launchpad Designer as an administration user.
2. Create a custom Fiori catalog, for example, with the following values, or re-use an existing catalog:

Field Name	User action and values
Title	Maintain a catalog title
ID	Maintain a catalog ID

3. In the catalog, create a new tile with the following parameters:
   Type of tile: App Launcher - Static

Field Name	User action and values
Title	Maintain a title
Subtitle	Maintain a subtitle
Icon	Optionally select one of the available icons
Use semantic object navigation	Do not select
Target URL	Maintain the URL of your external application

4. Decide to which Fiori group to add the new tile.
5. Then in SAP GUI, assign the Fiori catalog and Fiori group to a PFCG role, and assign the role to the relevant application users.

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