Creation and Configuration of Business Partners in SAP CRM

Applies to:

SAP CRM 2005 (5.0) and above release. For more information, visit the Customer Relationship Management homepage.

Summary

This document is the Business Process Design of the Business Partner Master data for SAP CRM. It describes the interpretation of the SAP CRM object Business Partner (abbreviated BP). The aim of this document is to acquire all information needed for the customizing object BP in SAP CRM. Through this document I have tried to explain about steps involved in BP creation and configuration.

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Author Bio

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Business Partner

Business partner is any entity with whom your organization has business relationship, transaction or interaction.

1. BP Category :
    - Person,
    - Group
    - Organization
2. BP can take any role. Standard roles are
    - Contact Person
    - Prospect
    - Sold to party
    - Bill to Party
    - Ship to Party
    - Payer etc..

Defining Number Range

In this activity, you define **number ranges** for business partners.

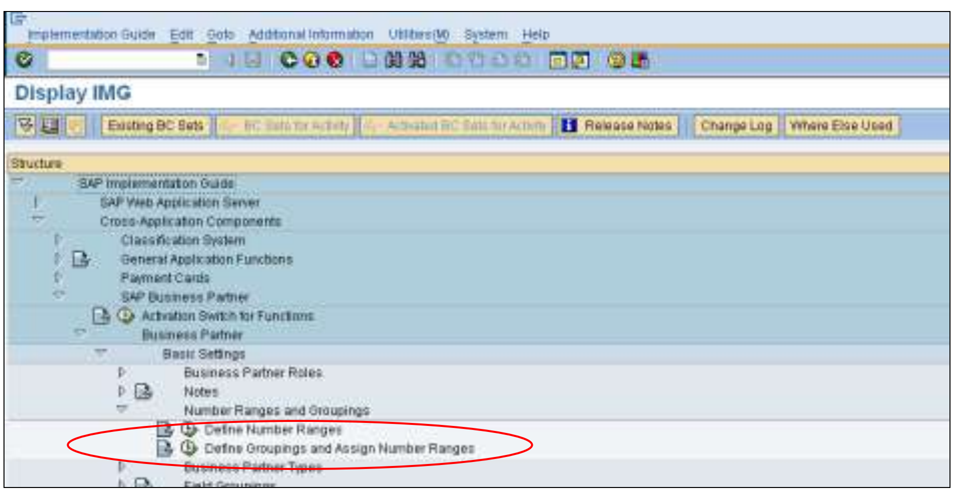
The defined number ranges are assigned to groupings in the **Define groupings and assign number ranges** activity. Number ranges for business partners are valid throughout a client.

Procedure

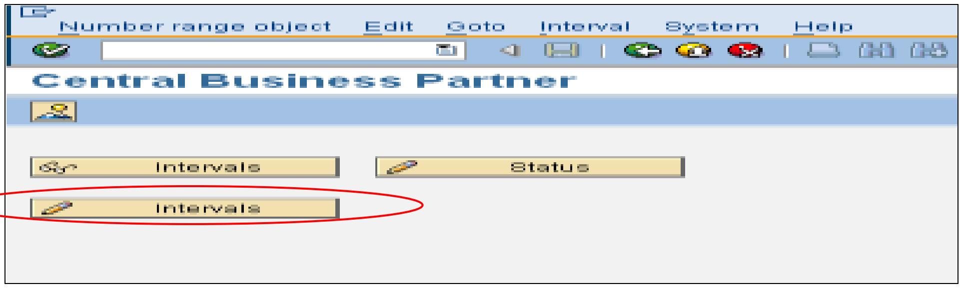
Access the activity using one of the following navigation options:

1.

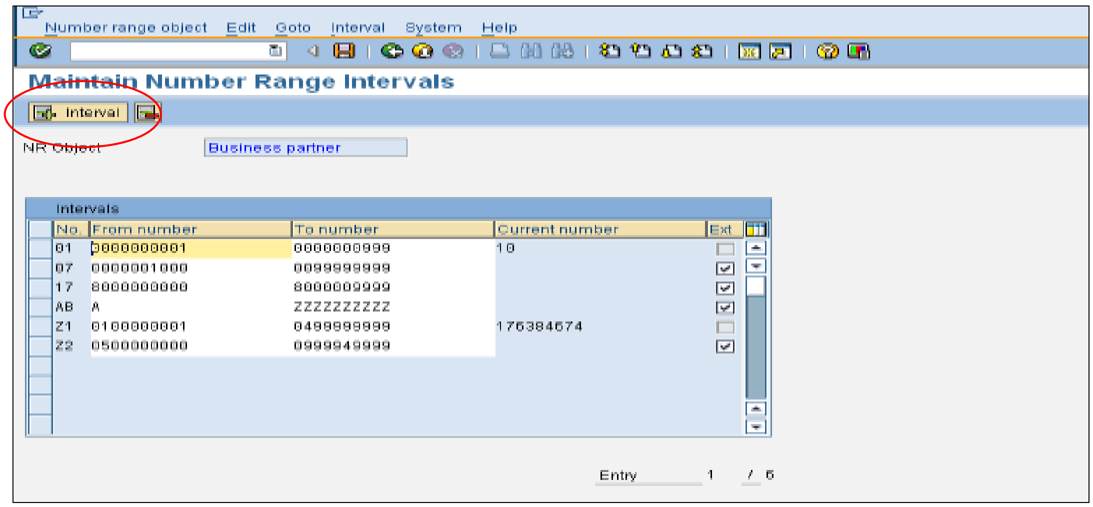
SAP CRM Role Menu	*Defining Number Range for Org Business Partners*
Transaction code	SPRO
IMG Path	Cross-Application Components à SAP Business Partner à Business Partner → Basic Settings → Number Ranges and Groupings → Define Number Ranges



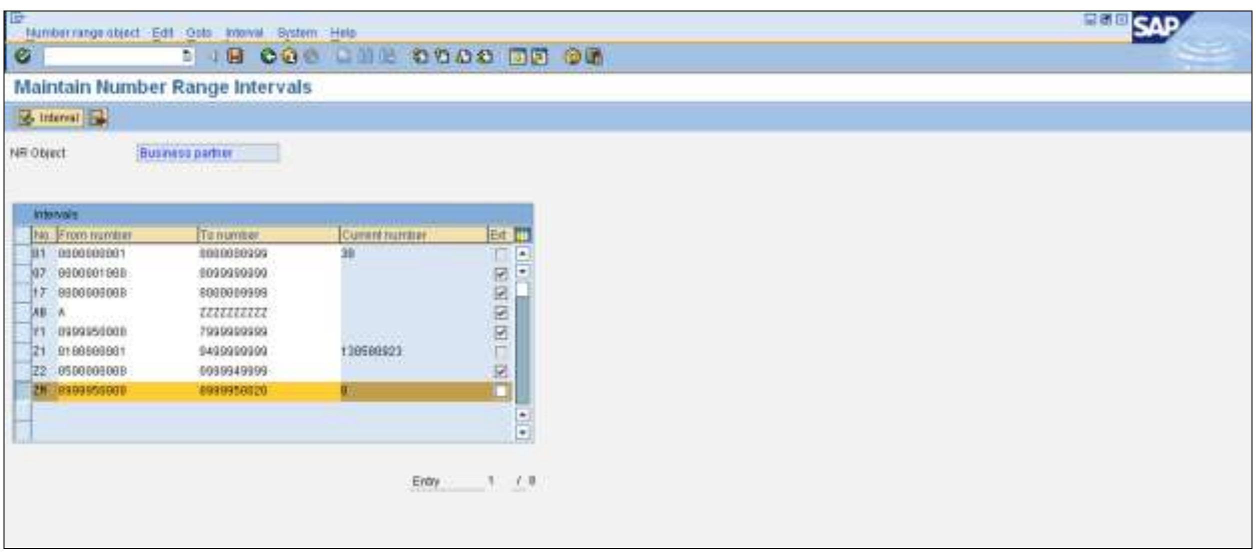
Choose Change Intervals



Choose Insert Interval.



Enter the Interval ID and range



Select Check Box Ext if External Number range is required

Please note: Receiving should have external number range.

Save your Entries

Result:

The Number ranges are defined as needed for different kinds of roles of Business Partner.

Defining Groupings and Assign Number Range

Use

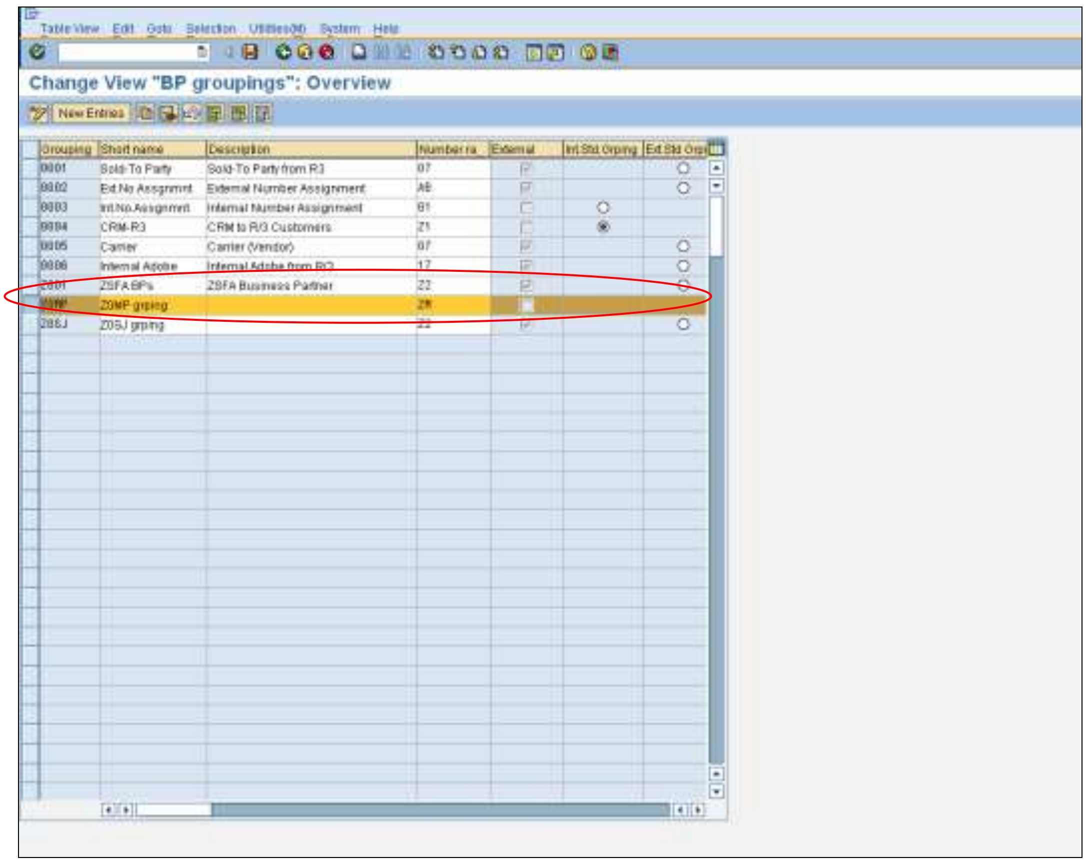
Assign each business partner to a grouping when you create the business partner. This grouping determines the **number range**.

You cannot change this assignment at a later stage.

Procedure

1. To carry out the activity, choose one of the following navigation options:

SAP CRM	*Defining Groupings*
Transaction code	SPRO
IMG path	*CRM → Cross-Application Components → SAP Business Partner → Business Partner → Basic Settings → Number Ranges and Groupings → Define Groupings and Assign Number Ranges*



2. Choose New Entries.
3. Enter the grouping, short name, description, assign number range.
4. Save your entries.

Result

All the Number Ranges defined are assigned to a group with a particular naming convention, which are used in Grouping Tab in Easy Access Screen of Business Partner.

Defining Business Partner Roles

BP roles define Rights and responsibilities that a business partner can have in various business transactions.

In this activity, you make the settings for the properties of business partner roles.

In the business partner dialog you can select from the entire business partner roles provided. If you only want to display certain business partner roles in the selection list, you can hide the other business partner roles.

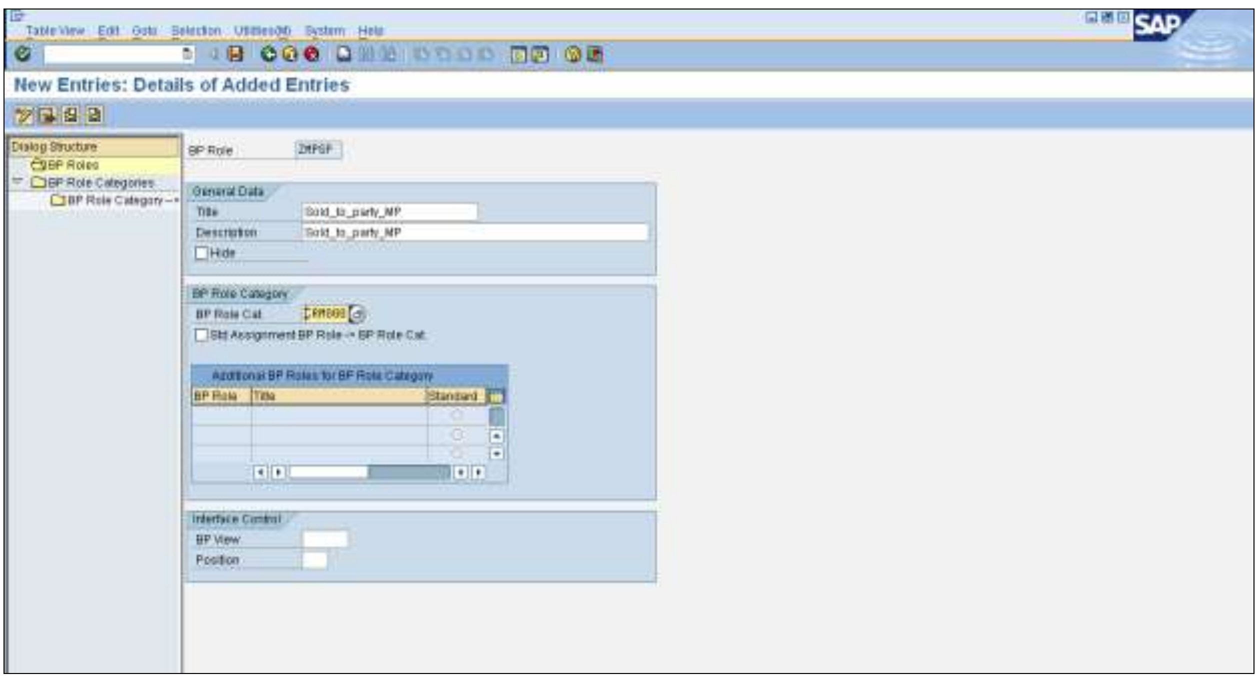
You can replace the standard title of business partner roles with customer-defined names

Procedure

To carry out the activity, choose one of the following navigation options

SAP CRM	*Defining Groupings*
Transaction code	SPRO
IMG path	*CRM → Cross-Application Components → SAP Business Partner → Business Partner → Basic Settings →*Business Partner Roles → Properties of Business Partner Roles

2. Select *New Entries*.



3. Select the required Business Partner Role Category.

   Set the indicator *Hide* if the business partner role is not to appear in the selection list.

   Define the *position* where the business partner role is to appear in the selection list.

   If you want to give the selected business partner role a different title to the standard title, enter the required *Customer title* under Title.

Save your Entries

The following roles will be used in SAP CRM:

Role Name **Category (Person/Org/Group)** **Remarks**

Role Name	Category (Person/Org/Group)	Remarks
Employee	Person	Use of Standard role Employee
Contact person	Person	Use of SAP standard role contact person
Sold to Party	Person/Organization	Use of SAP standard role sold-to party
Prospect	Person/Organization	Use of SAP standard role prospect
Ship to Party	Person/Organization	Use of SAP standard role Ship to Party
Bill to Party	Person/Organization	Use of SAP standard role Bill to Party
Retailer	Person/Organization	This role will be used to register the retailers.

Result.

All the Business Partner roles those the client wants to appear in the Easy access Screen are defined and all those that are unwanted are hidden.

The Business Partner Roles are named in accordance with the client's requirement.

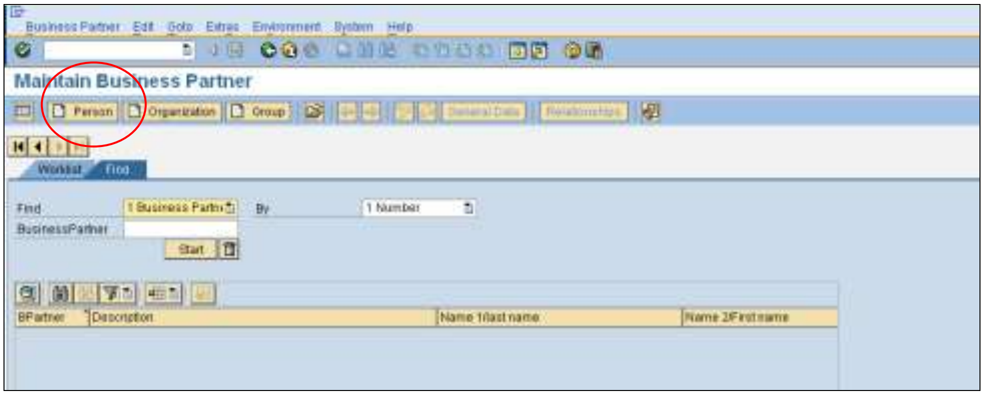
Creating a Business Partners

Procedure

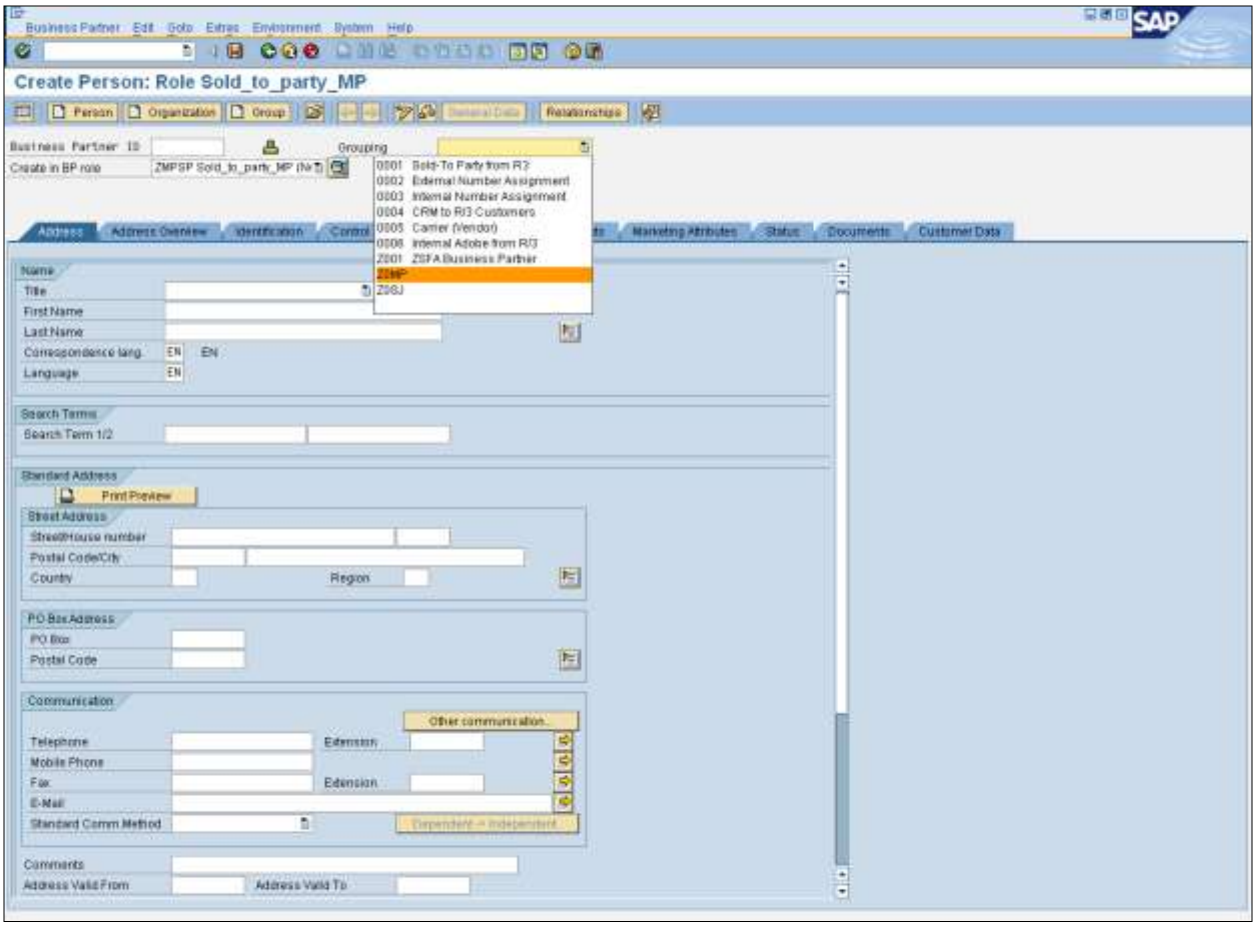
1. Access the activity using one of the following navigation options:

SAP CRM Role Menu	*Checking Business Partners*
Transaction code	BP
SAP Menu	Master Data → Business Partner → Maintain Business Partner

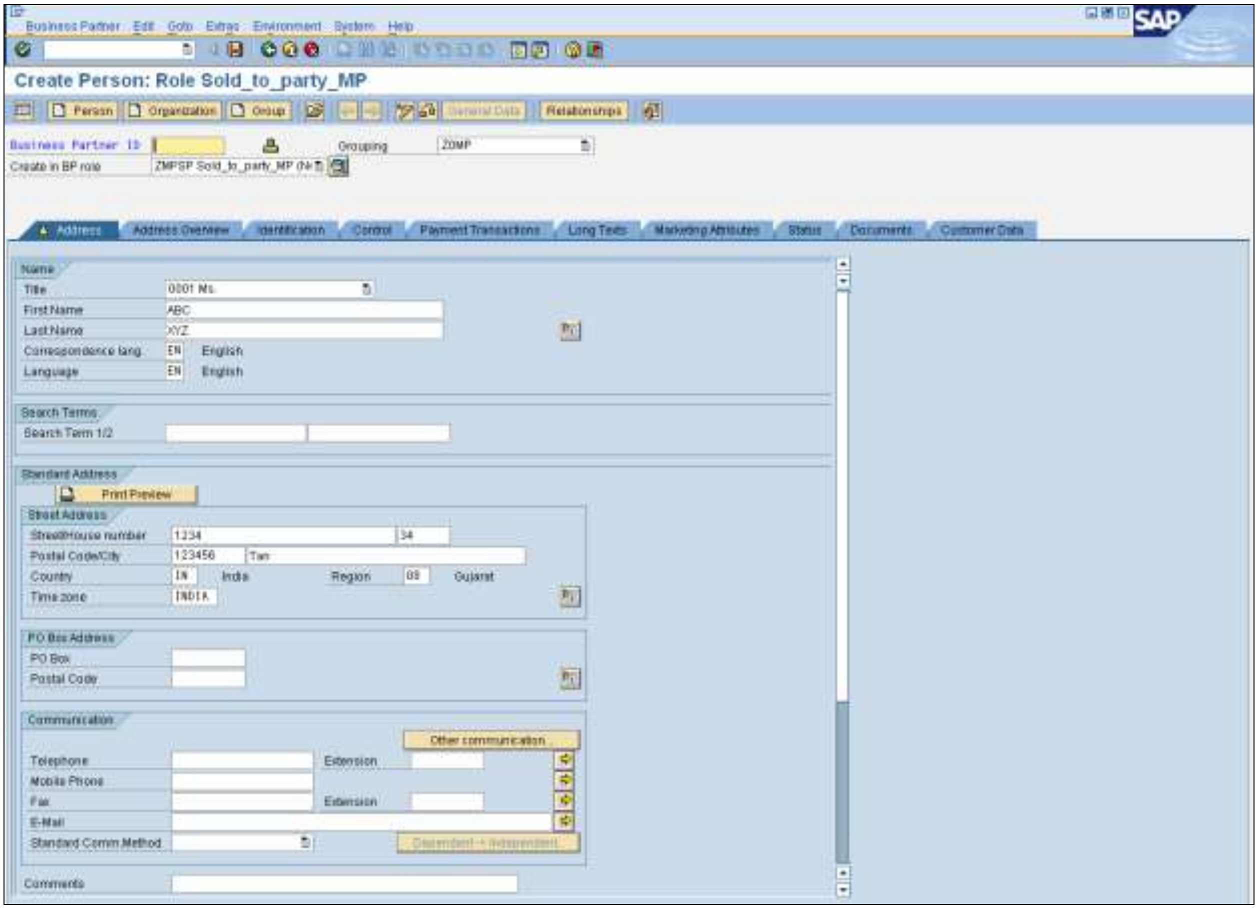
2. Go To create Person



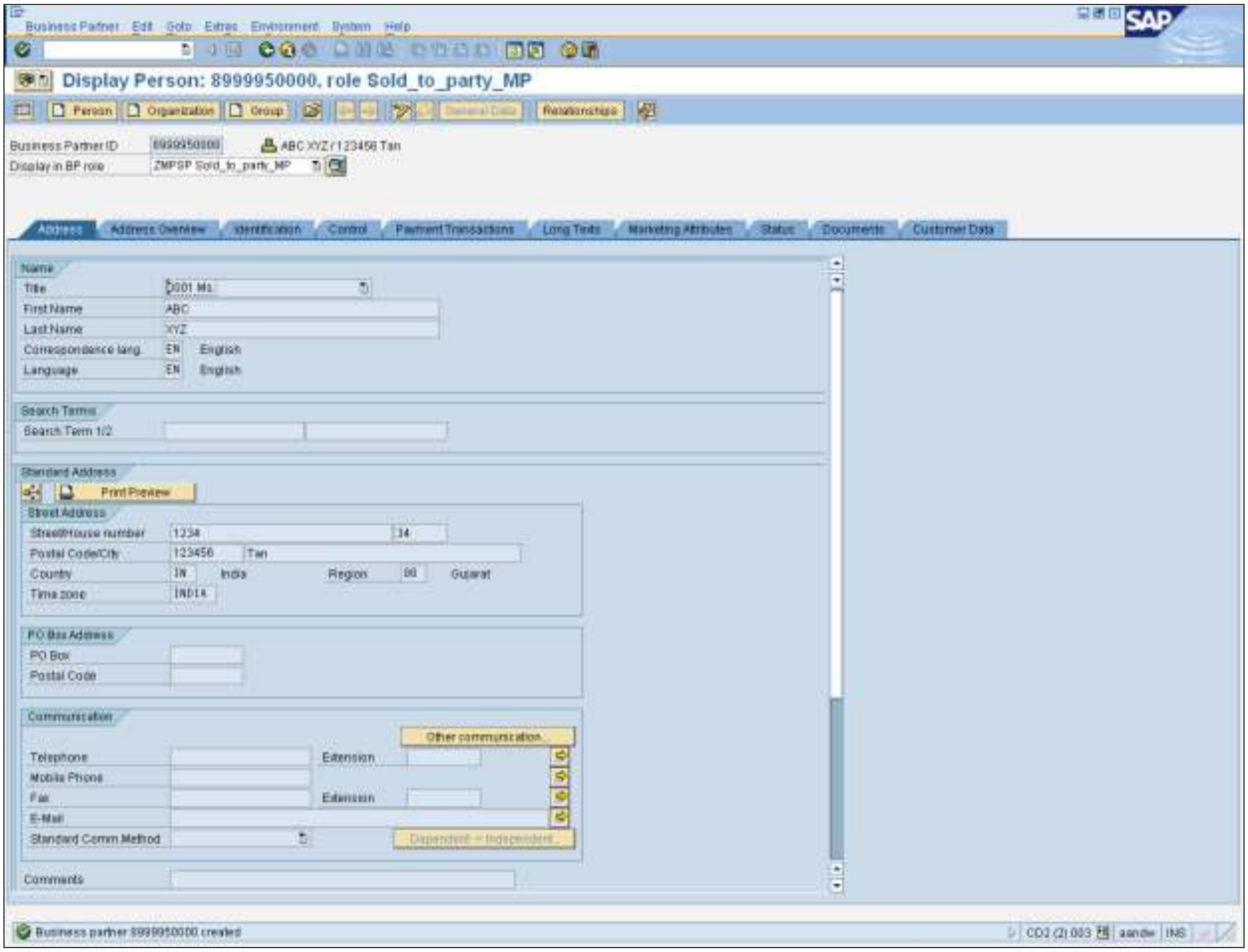
In the field display Role Choose sold to party and in Grouping Choose your Grouping, which you have created earlier.



3. Enter all the required data, like Title, Name, Address and also the data as required the other tabs



4. Save the entry.



Note the BP Id created.

5. Repeat the same for different roles.

Result

Business Partners are created with required roles.

Related Content

http://wiki.sdn.sap.com/wiki/display/CRM/Business+Partner+Concepts

For more information, visit the Customer Relationship Management homepage.

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