

Customer management

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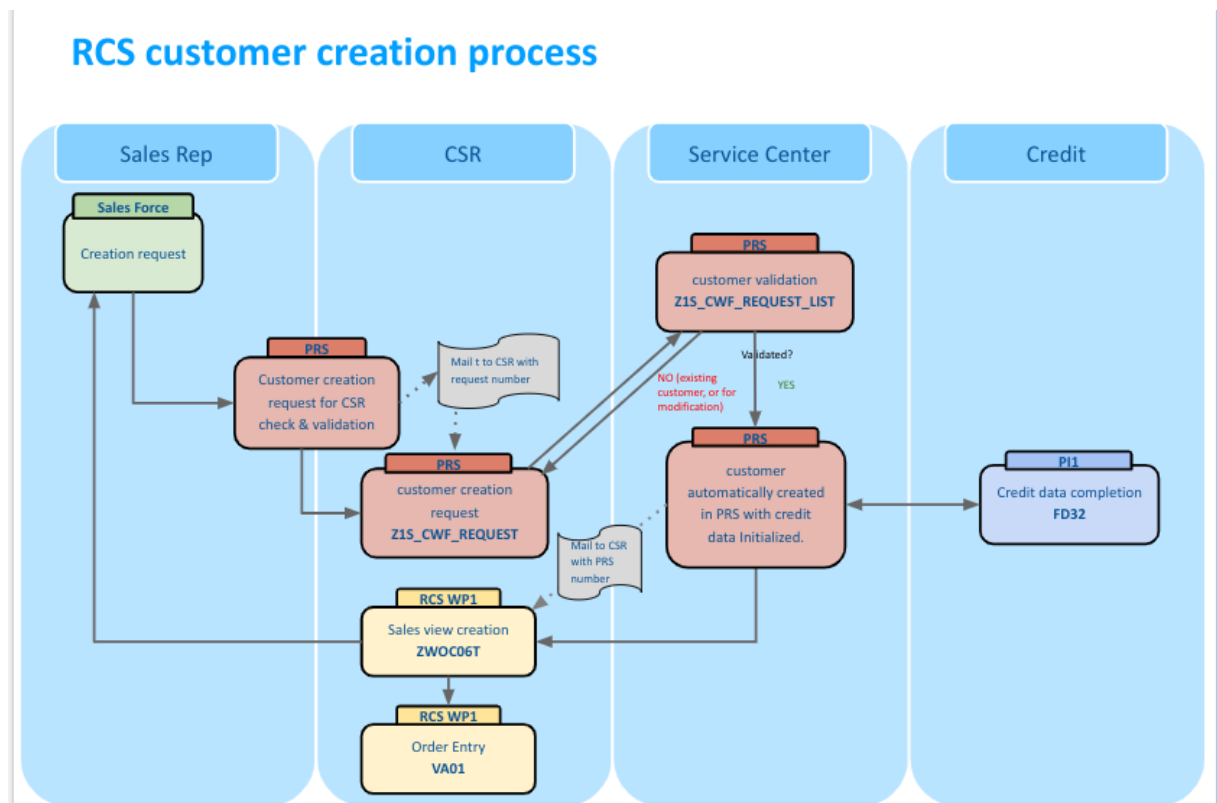
Customer creation process :

Customer Creation Process

Customer creation process with Salesforce (SFDC) CRM

Tables CWF

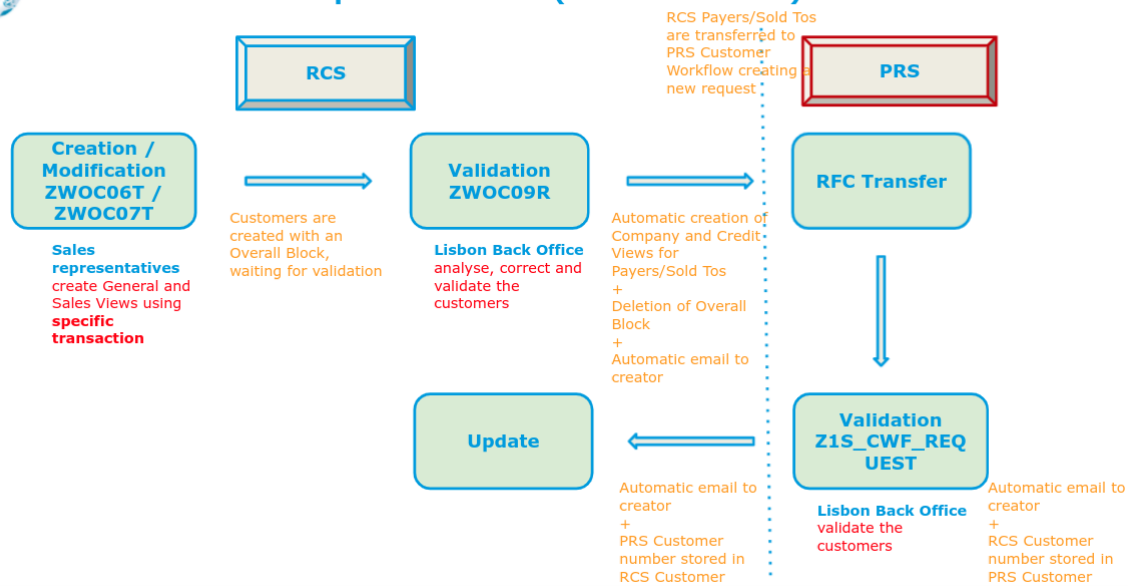
RCS workflow:



Old process (should not be used anymore):

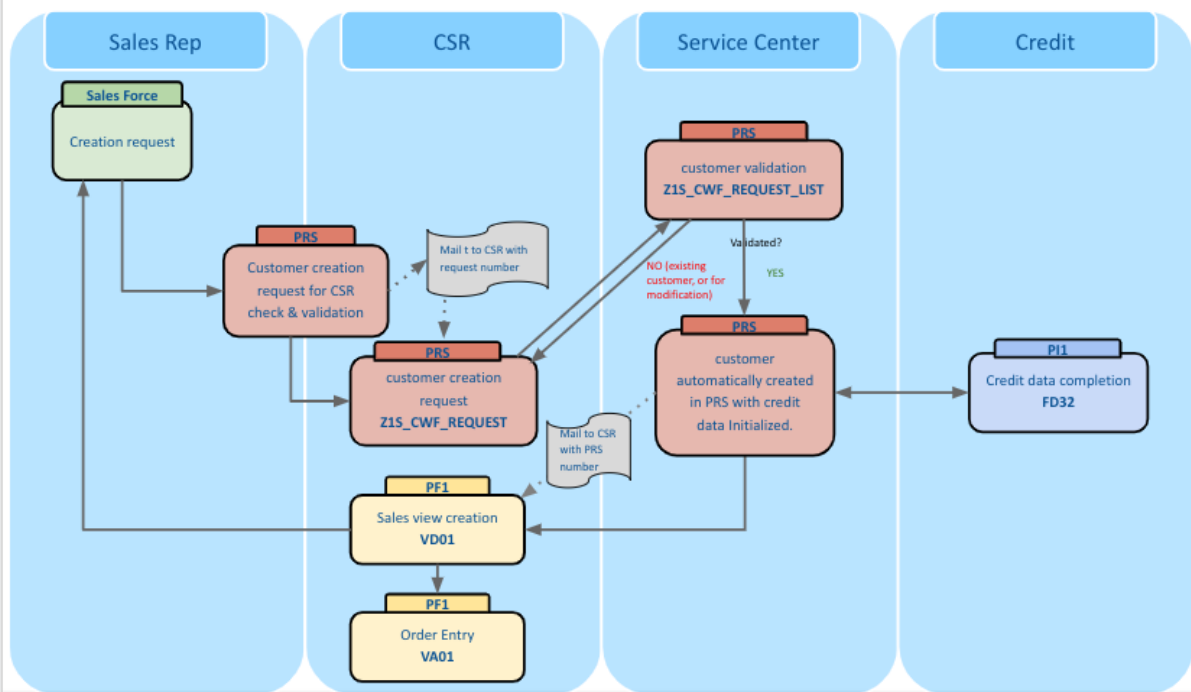


Customer creation process in RCS (GBU not in CRM)



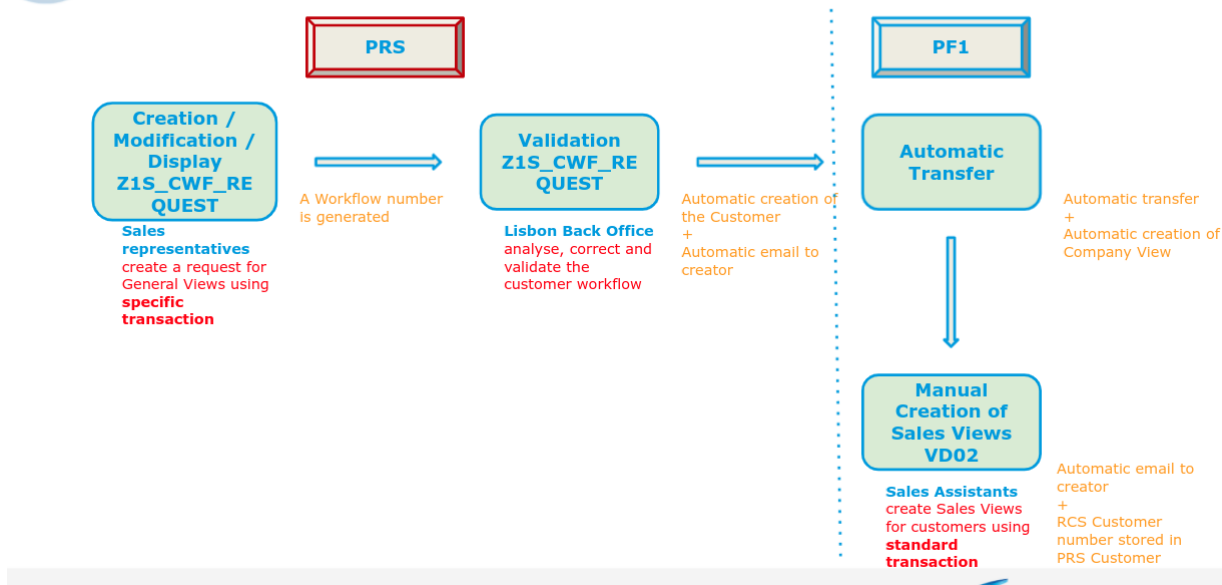
PF2 workflow:

PF1 customer creation process





Customer creation process in PF1 (GBU not in CRM)



Here is the detailed description of the complete process to create a new customer:

- [Customer Workflow](#)

Customer Data Management in SAP

Here is the documentation with functional and technical information, about customer data management in PRS and in both back-end WP2 and PF2:

- manage customer request in PRS
- create customer sales view in WP2 and PF2:

[SBS-F-OtC-Customer Management documentation](#)

In PF2-020, customer company code view are created automatically:

[Automatic creation at the company code level for all customers in PF2](#) : The name of the program is ZZS_CUSTOMER_CREATION

job is [Z_ZF_020_O_CUSCIECODEVIEW](#) :

Interface from Salesforce CORE to SAP PRS - Account Creation Request from Salesforce

The aim of this interface is to transfer the accounts with the status "Conversion requested" from Salesforce to SAP PRS.

Every 6 hours a batch will be launched in WebMethods to know what prospects need to be converted into a customer account. The batch will retrieve the records with the status "Conversion Requested" in the table account.

Once the records will be read in Salesforce, WebMethods will update directly the status of the initial records (from "Conversion Requested" to "Creation Requested").

Then WebMethods will transfer the accounts to SAP PRS by calling directly the module function Z_Z1U_CWF_IMPORT.

If the account is successfully created in SAP PRS, WebMethods will send an email to the CSR to alert her that a new customer has to be checked in PRS.

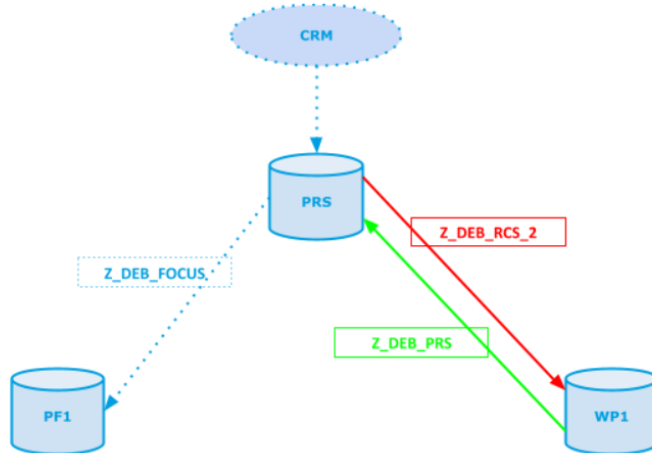
If the creation of the account is rejected by SAP PRS, WebMethods will update the status to "Rejected" in Salesforce.

Documentation:

https://docs.google.com/document/d/1LHOTrogucqr_UnYoxN9q-0BuZSjv7ME/edit

Interfaces between SAP backend and PRS - IDOC Interface for Customer creation:

Customer creation Interfaces



In the PRS system, once the customer creation request is complete and validated, the customer account is automatically created in PRS and an IDOC is sent to the backend systems PF2 or WP2. IDOC message is used to enable the creation of the customer account in the backend systems **WP2 & PF2**:

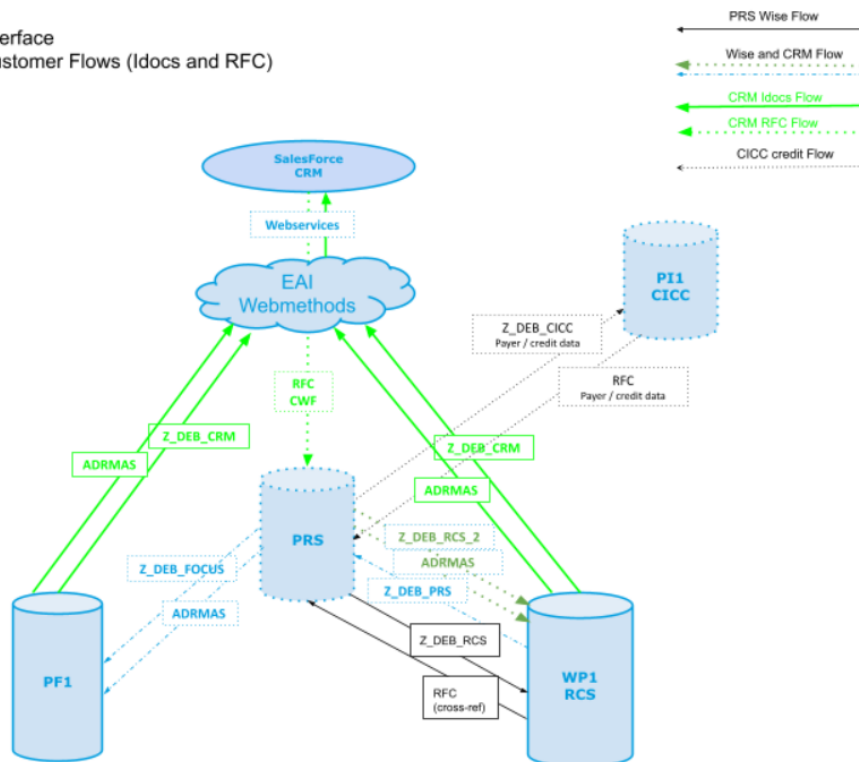
- From **PRS to PF2**: IDOC named **Z_DEB_FOCUS**
- From **PRS to WP2**: IDOC named **Z_DEB_RCS** for credit data and **Z_DEB_RCS_2** for general data
- From **WP2 to PRS**: Once the customer is created in RCS, the RCS customer number is sent back to PRS in IDOC **Z_DEB_PRS**.

Here is the documentation related to the IDOC used for customer creation between PRS and both back-end WP2 and PF2:

https://drive.google.com/file/d/1m28DSs8RG6fCt8hKTPSTLebn_Hlj7ov3Zakl34Mg6O0/edit

Interface - Idoc Interface for Customer SAP to CRM

Interface Customer Flows (Idocs and RFC)



The aim of this interface is to feed SalesForce CRM with customer data (customer master data, address, Sales Representative (KNVV-VKGRP) and Sales Assistant information) from backend systems WP2 and PF2 using 2 Idoc:

Z_DEB_CRM and ADRMAS.

Documentation:

[Idoc Interface Customer - SAP to CRM SFDC](#)

In the scope of SAP customer general data in project 11518, the Corporate group management has been added in the customer creation a dedicated interface has been created in order to manage the corporate group from CRM salesforce core to SAP systems (PRS directly and the same Idoc are used to provide the corporate group in PF2 and WP2 (field KNA1-KONZS)

Interface GBU segmentation

In the frame of the CEM project (Customer Engagement Model), it has been implemented a new customer segmentation in SAP in order to apply differentiated service to the customer depending on their customer segment. This customer segmentation is implemented in SAP in the customer sales view, in the field "GBU segment" (KNVV-KVGR2). This segmentation was also implemented in the CORE CRM system (SalesForce).

SalesForce is the MASTER system for the Customer Segmentation, SAP being the SLAVE. To ensure the customer segmentation alignment between SalesForce and SAP, 2 interfaces were created:

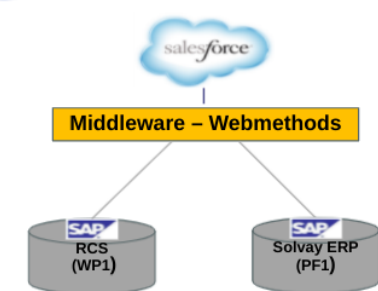
• SAP to SalesForce - GBU segment:

This interface is triggered in SAP each time a customer sales view is created or changed in SAP to update the field "GBU segment" with the customer segmentation coming from SalesForce

In the user-exit called at the saving of the customer sales view (include ZXF04U01, a new RFC Function Module "Z_SD_KVGR2_RQST" was created. This FM sends a request to SalesForce to get back the customer segmentation, and the returned value is updated in real-time in SAP during the saving of the customer sales view.

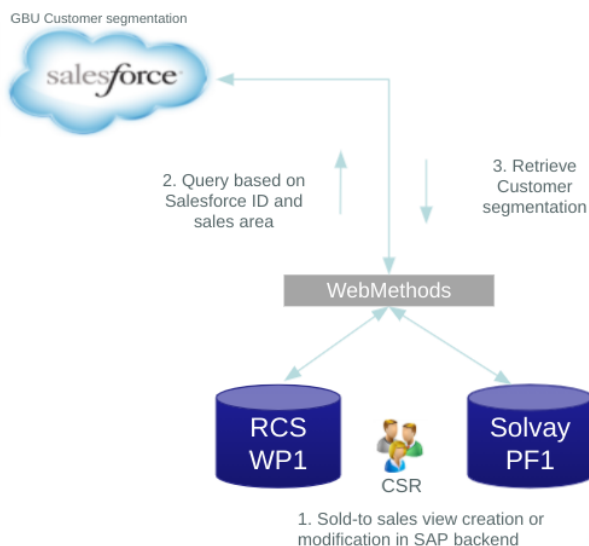


Data Integration (CEM customer segmentation - Real Time update)



Postulate:

- During the customer creation or change in SAP, the Customer segmentation is queried to Salesforce based on Salesforce ID and Sales area.
- Customer segmentation is retrieve in Salesforce from the GBU customer segmentation and send back to SAP
- Customer segmentation is update in real time in SAP.



Documentation:

[SBS-F-OTC-SD CEM Customer segmentation interface SAP- CRM WP2](#)

[Interface - Customer Segmentation SAP to SFDC V1.1 \(Webmethod\)](#)

• SalesForce to SAP - GBU segment:

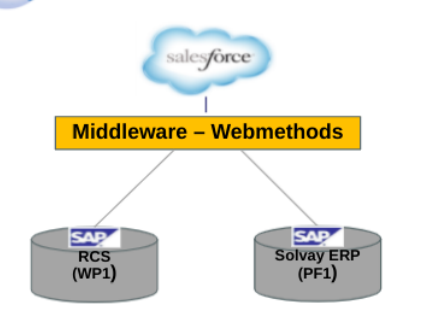
This interface is triggered in Salesforce after the customer segmentation was updated in Salesforce so that it is replicated into SAP.

A job is periodically running in Salesforce to send to SAP the changes done on the customer's segmentation. In SAP, the FM Z_SD_CUST_SEG_UPDAT E is called by WebMethods to update the customer segmentation with the data sent by SF.

If any errors are detected during the process, it will be logged in a dedicated table ZSD_CUST_SEG_ERR and the data will be reprocessed later on by the program ZSD_CUST_SEG_UPDATE_ERROR. This program is running in a periodically scheduled job to reprocess entries in error.

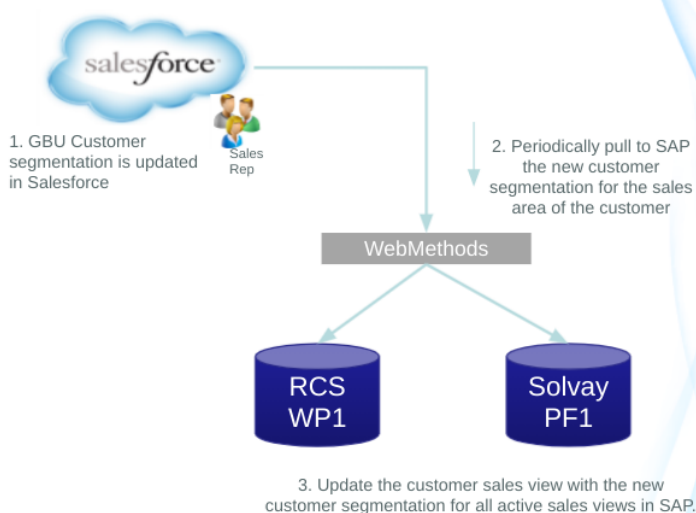


Data Integration (CEM customer segmentation - Periodically update)



Postulate:

- Periodically, all changes done in Salesforce on the GBU customer segmentation are sent to SAP.
- Customer segmentation is updated in background in SAP.



Documentation:

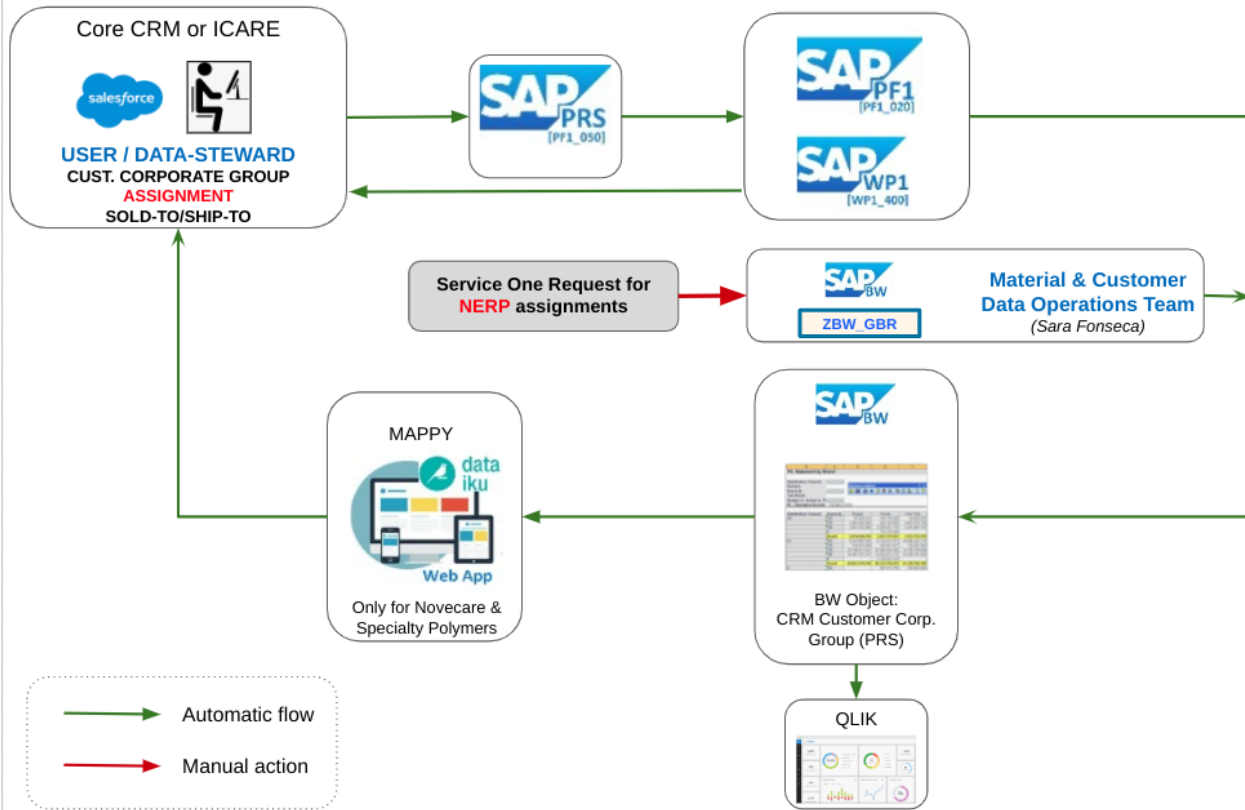
[SBS-FFS -WP2 / PF2 - CEM - Customer segmentation - Interface Salesforce to SAP - V1.0](#)

Corporate Customer Group Mapping Governance :

CRM is the master for Customer Sales group data. It is saved in the Customer Account Number in SAP (KNA1-KONZS).



Corporate Customer Group Mapping Governance



New interface has been created to manage the corporate group change (as they have been added to the account creation interface)

[Interface -Corporate Group from Core](#)

ACCOUNT Ship-to integration from SAP PRS to CRM

The aim of this interface is to:

- create the ShipTo account in SFDC based on the data (IDoc DEBMA07 and ADRMAS03) from SAP PRS
- update the SFID in SAP PRS by calling the Function Module Z_ZSF_UPDATE_SFID

[Interface - ShipTo Creation](#)