

Applies to:

SAP CRM System 6.0/7.0. For more information, visit the [Customer Relationship Management homepage](#)

Summary

This article explains how to customize the Fact Sheet for different business roles.

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Created on: 02 August 2010

Author Bio

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Introduction

Factsheet provides you the immediate access to key information about your customers. This information could be Business Partner CRM Master Data, Transactional CRM Data, BI Report and ECC Data. Fact Sheet helps you to quickly retrieve the information about the customers before interacting with them to better handle customer queries.

Fact Sheet can be accessed via Account Overview as shown below. Two types of factsheet are possible: Online Version and PDF Version.

Corporate Account: Ketiv Technologies / DENVER CO 80231

Save | New **Fact Sheet** **PDF Fact Sheet** Employee Assignment

Home

▼ Account Details Edit

Corporate Account: Ketiv Technologies / DENVER CO 80231 - Account Fact Sheet

▼ Sales Organization Selector

Sales Organization: [Dropdown]
Distribution Channel: [Dropdown]
Division: [Dropdown]

▼ Contacts

Name	Function	Department	Home Address	PhoneExt.
Lisa Pearce			7822 Bucknell Street / DENVE...	+1 (303) 813-8253
Kim Johnson			7822 Bucknell Street / DENVE...	+1 (303) 813-8256
Sigrid Bressler			7822 Bucknell Street / DENVE...	+1 (303) 813-8257

▼ Credit Information

No result found

▼ Interaction History

No result found

▼ Installed Base Components

Installed Base	Component	Identification	Description	Component Type	Valid From	Valid To
505	505	2352	PC	Text Component	18.07.2006 07:47:34	31.12.9999 23:59:59
505	508		Server Basic	Product	18.07.2006 07:50:08	31.12.9999 23:59:59
505	510	6721	Scanner	Text Component	18.07.2006 07:51:00	31.12.9999 23:59:59
505	514		Photo Scan	Product	18.07.2006 07:57:06	31.12.9999 23:59:59

▼ Opportunities

Description	Closing Date	Employee Resp.	Sales Stage	Status	Exp. Sales Vol.	Curr.
Server and Desktop Deal	02.03.2008	Chris Baker / DENVE...	Qualification	In process	15.000.000,00	USD

Account Overview:

List of the opportunities for account 3277:

Start date	End date	Description	Expected sales revenues	Contact person	Responsible employee
09.08.2007	02.03.2008	Server and Desktop Deal	15.000.000,00	Chris Robertson / GLENVIEW IL 60025	Chris Baker / DENVER CO 80231

1 Total opportunities.

Contact person for account 3277

Name	Telephone	Extension	Function	Company department
Lisa Pearce	303-813	8253		
Kim Johnson	303-813	8256		
Sigrid Bressler	303-813	8257		

3 Total contact persons.

Relationships for account 3277

Relationship	Partner ID	Name	Valid from	Valid to
To Service Center	400007	PC-U-Service PC-UJ Service		

2 Total relationships.

Data for sales area:

PC4J US (SORG 3020)

Delivery priority	Shipping conditions	Customer group	Terms of payment	Exchange rate type
00	01		0001	
00	01		0001	

Data for sales area:

Internet Sales

Delivery priority	Shipping conditions	Customer group	Terms of payment	Exchange rate type
00	01		0001	
00	01		0001	

Online Fact Sheet can be configured in form of different assignment blocks containing data from different sources like SAP CRM, SAP ECC and BI. While PDF Factsheet can contain data only from SAP CRM and SAP ECC.

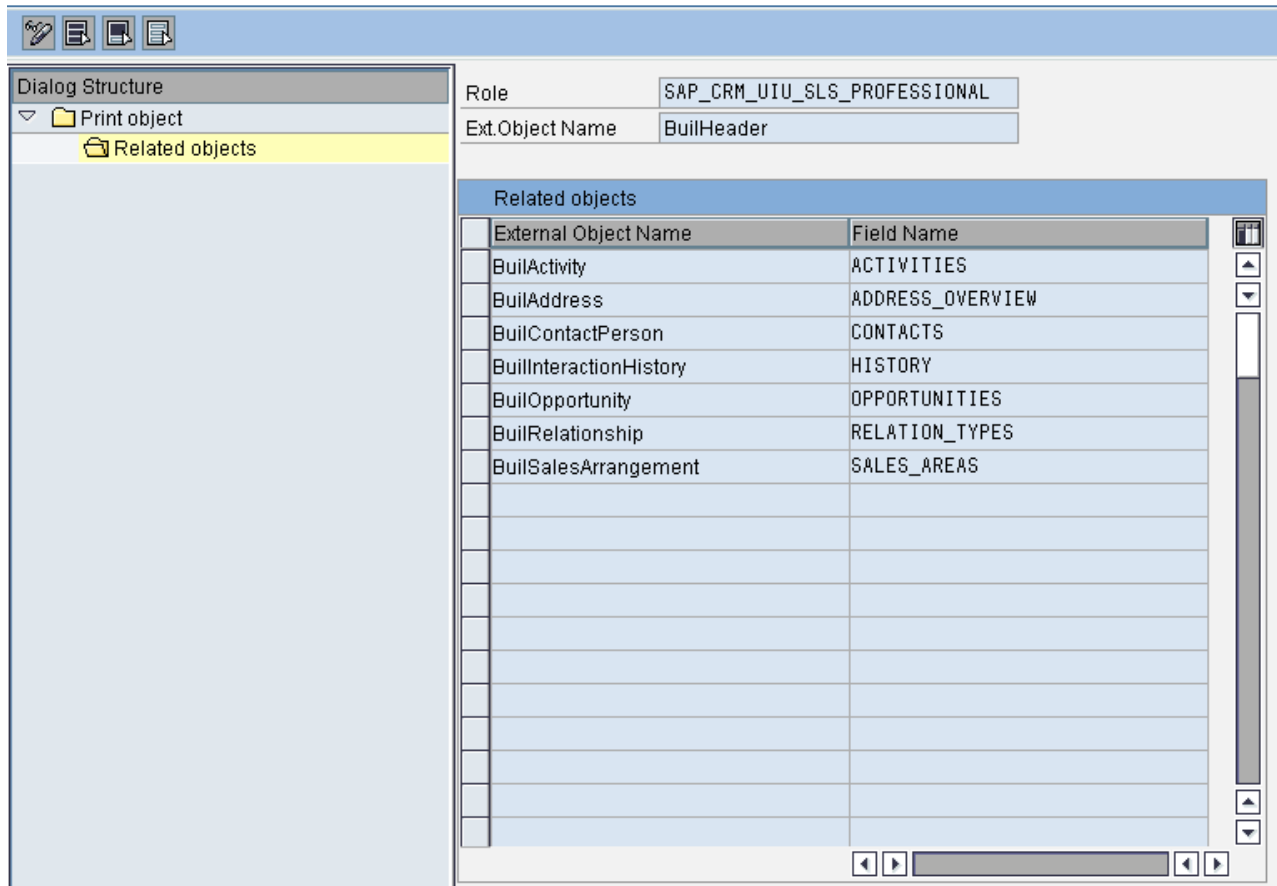
Customizing Fact Sheet:

Fact Sheet buttons are by default visible for standard business roles like 'SALESPRO'. Standard Account Fact Sheet is 'BP_ACCOUNT_FS' that can be accessed using standard SAP business roles. Custom business roles can also be configured to allow standard Fact Sheet access.

Fact Sheet Access for Custom Business Roles:

Maintain the View Cluster 'CRMVC_BUIL_PRT' for the Custom SAP Role attached to Custom Business Role for which standard Fact Sheet access to be granted. This can be done by copying the standard SAP Role 'SAP_CRM_UIU_SLS_PROFESSIONAL' while creating new SAP Role. We need to copy the print object as well as related objects as shown below.

Display View "Related objects": Overview



The screenshot displays the SAP CRM interface for maintaining related objects. On the left, the 'Dialog Structure' pane shows a tree view with 'Print object' expanded and 'Related objects' selected. The main area shows the configuration for the role 'SAP_CRM_UIU_SLS_PROFESSIONAL' and the external object name 'BuilHeader'. Below this, a table lists the related objects and their corresponding field names.

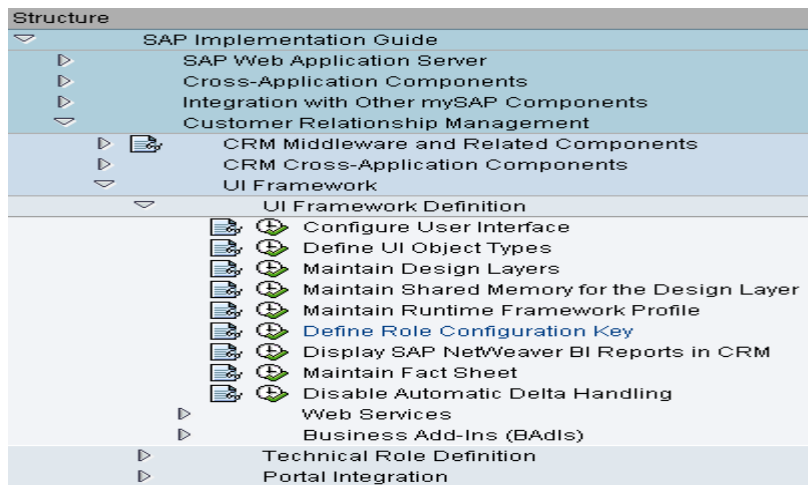
External Object Name	Field Name
BuilActivity	ACTIVITIES
BuilAddress	ADDRESS_OVERVIEW
BuilContactPerson	CONTACTS
BuilInteractionHistory	HISTORY
BuilOpportunity	OPPORTUNITIES
BuilRelationship	RELATION_TYPES
BuilSalesArrangement	SALES_AREAS

After maintaining the view cluster 'CRMVC_BUIL_PRT' for the custom SAP Role, you can see the Fact Sheet buttons in the account overview. These Fact Sheet buttons will point to standard Fact Sheet 'BP_ACCOUNT_FS'

Customizing Standard Fact Sheet 'BP_ACCOUNT_FS' for different Business Roles:

Steps:

- Create new Role Configuration Key in the SPRO at location shown below.



- Assign this new Role Configuration Keys to different business roles in SPRO as shown below. In this case, Role Configuration Key 'ZCNFG6' has been assigned to Business Role 'ZSALESPRO'.

Business Role	ZSALESPRO
Define Business Roles	
Profile Type	CRM WebClient Business Role
Description	Sales Professional
Role Config. Ke	ZCNFG6
Nav Bar Profile	SLS-PRO
Layout Profile	CRM_UIU_MASTER
Technical Profile	Z_MRKT_TECH_PROFILE
PFCG Role ID	ZSALES_PROFESSIONAL2
SpecificHelpContext	
<input type="checkbox"/> SpecHelpFallback	

- Open the CRM Web UI Component 'BSP_DLC_FS' to configure the factsheet for different Business Roles in BSP WD Workbench (Transaction Code: BSP_WD_CMPWB).
- Click on the Configuration tab for the view 'Factsheet'.
- Select the Standard Fact Sheet 'BP_ACCOUNT_FS' from the drop down and press search button.
- It will display all the configurations maintained for the Fact Sheet 'BP_ACCOUNT_FS'. If there are no custom configuration maintained, system will display only the default configuration maintained for default configuration key as shown below.

Structure of Component BSP_DLC_FS - Standard View

The screenshot shows the 'Fact Sheet Configuration' wizard in SAP. The left pane displays the component structure, with 'BSP_DLC_FS/factsheet' selected. The main area is titled 'Fact Sheet Configuration' and shows a progress bar with three steps: 'Select Fact Sheet Configuration', 'Select Page Type', and 'Assign Views'. The 'Assign Views' step is active. Below the progress bar, there is a 'Search Criteria' section with a dropdown menu showing 'Fact Sheet | Account Fact Sheet (BP_ACCOUNT_FS)'. A 'Search' button is present. Below the search criteria is a 'Result List' table:

Fact Sheet	Role Config. Key	Standard Config.	Customer Config.
Account Fact Sheet (BP_ACCOUNT...	<DEFAULT>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Maintain the different configurations for the Fact Sheet 'BP_ACCOUNT_FS' based on different Role Configuration Keys for different Business Roles. During new configuration creation, system will ask for Page Type and Layout. Select the views from the available views to be displayed in the Fact Sheet as shown below.

The screenshot shows the 'View' section of the configuration wizard. It has a 'View' button and a 'Show Technical Details' link. Below are two tables:

Available Fact Sheet Views

Title
Account Billing Data
Account Sales Data
Account Shipping Data
Activities
Backorders
Cases
Competitor Products
Credit Information
Opportunities
Installed Base Components

Assigned Fact Sheet Views

Title	Configuration	Load Option
Sales Organization Se...	Configuration	Expanded
Contacts	Configuration	Expanded
Account Revenue (Tab...	Configuration	Expanded
Sales Pipeline	Configuration	Expanded
Credit Information	Configuration	Expanded
Interaction History	Configuration	Expanded
Installed Base Compo...	Configuration	Expanded
Account Revenue	Configuration	Hidden
Opportunities	Configuration	Hidden
Activities	Configuration	Hidden

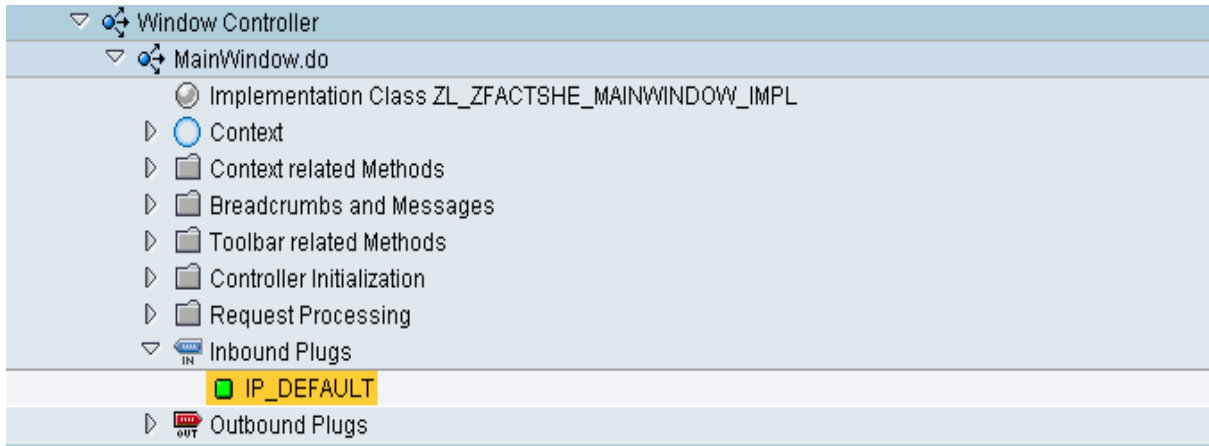
Note: When user will login to CRM WEB UI, correct Fact Sheet will be launched based on the Business Role (Role Configuration Key) attached to the user. If there is no factsheet maintained for the particular Role Configuration Key, default Fact Sheet will be launched.

Adding Custom Views to the Fact Sheet:

Custom views can be added to the Standard Fact Sheet 'BP_ACCOUNT_FS' to display the custom data.

Steps:

- Create a new view to be displayed in the Fact Sheet inside the new or existing component.
- Create empty Input Plug 'DEFAULT' for the MainWindow to which new view is assigned.



- Create Input Plug 'DEFAULT' for the newly created view. Inside the plug method, data about the Business Partner can be read through collection 'IV_COLLECTION', based on this other related data can be read about the business partner to be displayed in the Fact Sheet.

Sample Code to read Business Partner from collection:

Class Builder: Class ZL_ZFACTSHE_FACTSHEET_IMPL Change

Ty.	Parameter	Type spec.	Descri...
	IV_COLLECTION	TYPE REF TO IF_BOL_BO_COL OPTIONAL	

Method: IP_DEFAULT Active

```

25 | *-----*
26 |
27 | DATA:
28 |     lr_entity          TYPE REF TO if_bol_bo_property_access,
29 |     lv_customer_no    TYPE crmt_partner_no,
30 |     ls_parameters     TYPE CRMT_NAME_VALUE_PAIR,
31 |     lr_msg_service    TYPE REF TO cl_bsp_wd_message_service.
32 |
33 | CHECK iv_collection IS BOUND.
34 | Clear l_parameters_tab.
35 | lr_entity ?= iv_collection->get_first( ).
36 |
37 | CHECK lr_entity IS BOUND .
38 |
39 | lr_entity->get_property_as_value(
40 |     EXPORTING
41 |         iv_attr_name = 'BP_NUMBER'
42 |     IMPORTING
43 |         ev_result   = lv_customer_no ).
44 |
45 | ENDMETHOD.

```

- Build view logic for the fields to be displayed in the Fact Sheet.
- Create the Interface view for the 'MainWindow'.
- Now add the newly created view to the standard Fact Sheet 'BP_ACCOUNT_FS' through 'Maintain Fact Sheet' in SPRO.

Structure

- SAP Implementation Guide
 - SAP Web Application Server
 - Cross-Application Components
 - Integration with Other mySAP Components
 - Customer Relationship Management
 - CRM Middleware and Related Components
 - CRM Cross-Application Components
 - UI Framework
 - UI Framework Definition
 - Configure User Interface
 - Define UI Object Types
 - Maintain Design Layers
 - Maintain Shared Memory for the Design Layer
 - Maintain Runtime Framework Profile
 - Define Role Configuration Key
 - Display SAP NetWeaver BI Reports in CRM
 - Maintain Fact Sheet
 - Disable Automatic Delta Handling
 - Web Services
 - Business Add-Ins (BADIs)
 - Technical Role Definition
 - Portal Integration

- Select the standard Fact Sheet 'BP_ACCOUNT_FS' and click on the 'Views Assignment' on the left hand side navigation window.
- Click on the 'New Entries' button and add the details about the new component as shown below.

New Entries: Overview of Added Entries

Change View "View Assignments": Overview

Component Name	Interface View	Inbound Plug	Title
BP_FACTSHEET	MainWindow	IBASECOMP	Installed Base Components
BP_FACTSHEET	MainWindow	IBASES	Installed Bases
BP_FACTSHEET	MainWindow	INDVOBJECTS	Individual Objects
BP_FACTSHEET	MainWindow	LASTSALESDOCS	Last Sales Docs
BP_FACTSHEET	MainWindow	MKTGCAMPAIGNS	Marketing Campaigns
BP_FACTSHEET	MainWindow	MKTINGATTRS	Marketing Attributes
BP_FACTSHEET	MainWindow	OPENLEADS	Open Leads
BP_FACTSHEET	MainWindow	PARTNERFUNCTION	Partner Functions
BP_FACTSHEET	MainWindow	SERVICECONTRAC	Service Contracts
BP_FACTSHEET	MainWindow	SERVICEORDERS	Service Orders
BP_FACTSHEET	SalesOrgSelectorWinc	DEFAULT	Sales Organization Selector
BP_HIER	BP_HIER/NodesOfBus	DEFAULT	Association Hierarchy
ICOMP_AFS_HIS	ICOMP_AFS_HIS/Main	TO_GENERIC_HIS	Generic History View/Complaints
ZFACTSHEET	ZFACTSHEET/MainWir	DEFAULT	CRM Master Data

- Now we can see the custom view under the 'Available Fact Sheet Views' for the standard Fact Sheet 'BP_ACCOUNT_FS'.

Component Name	Interface View	Inbound Plug	Title
BP_FACTSHEET	MainWindow	MKTGCAMPAIG...	Marketing Camp...
BP_FACTSHEET	MainWindow	MKTINGATTRS	Marketing Attribu...
BP_FACTSHEET	MainWindow	OPENLEADS	Open Leads
BP_FACTSHEET	MainWindow	PARTNERFUNC...	Partner Functions
BP_FACTSHEET	MainWindow	SERVICECONTR...	Service Contracts
BP_FACTSHEET	MainWindow	SERVICEORDERS	Service Orders
BP_FACTSHEET	SalesOrgSelecto...	DEFAULT	Sales Organizati...
BP_HIER	BP_HIER/Nodes...	DEFAULT	Association Hier...
ICOMP_AFS_HIS	ICOMP_AFS_HI...	TO_GENERIC_HIS	Generic History ...
ZFACTSHEET	ZFACTSHEET/Main	DEFAULT	CRM Master Data

Comp...	Interfa...	Inbou...	Title	Config...	Usage...	Usage...	Load ...
BP_F...	Sales...	DEFA...	Sales ...	Config...	BP_F...	0002	Expan...
BP_F...	Conta...	DEFA...	Conta...	Config...	BP_F...	0005	Expan...
BP_F...	BIRep...	DEFA...	Accou...	Config...	BP_F...	0032	Expan...
BP_F...	BIRep...	DEFA...	Sales ...	Config...	BP_F...	0004	Expan...
BP_F...	Main...	CREDE...	Credit ...	Config...	BP_F...	0029	Expan...
BP_F...	Intera...	DEFA...	Intera...	Config...	BP_F...	0001	Expan...
BP_F...	Main...	IBAS...	Install...	Config...	BP_F...	0020	Expan...
BP_F...	BIRep...	DEFA...	Accou...	Config...	BP_F...	0003	Hidden
BP_F...	Main...	DEFA...	Oppor...	Config...	BP_F...	0006	Hidden
BP_F...	Main...	ACTIV...	Activiti...	Config...	BP_F...	0014	Hidden

- Add this custom view to the 'Assigned Fact Sheet View' to display it when user launches the Fact Sheet.

Related Content

<http://help.sap.com>

[Fact Sheet](#)

For more information, visit the [Customer Relationship Management homepage](#)

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