Automatic creation of Business Partner in FSCM

Applies to:

Enterprise Resource Planning. For more information, visit the Enterprise Resource Planning

Summary

When a Customer is created in Financial Accounting – Accounts Receivable (FI-AR) and we need the same customer with same number as a Business Partner in Financial Supply Chain Management (FSCM) then we need to create Business Partner manually in FSCM. This article will help to create the Business Partner automatically in FSCM when a Customer is created in FI-AR.

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Author Bio

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Business Need

Suppose you create a customer with Payer partner in Accounts receivable (FI-AR) using XD01 and you need the same customer with the same number in Financial Supply Chain Management (FSCM) as a Business Partner. In that case you again need to create the Business Partner manually in FSCM. This will be very difficult if you have very large number of customers. Also if any changes are done in customer master they will not be reflected in Business Partner. To avoid that and to create the Business Partner automatically when a customer master data is created in Accounts Receivables, you need to do the data integration

Many SAP customers have been using Financial Accounting for a long time and are now increasingly using other applications, such as SAP Collections Management (FSCM-COL), SAP Treasury and Risk Management (TRM) or Loans Management (FS-CML) which uses the SAP Business Partner to manage business partners. These customers require business partners that are managed as customers/vendors in Financial Accounting and as business partners in other applications, to exist synchronously.

Business Partner can be a person or a group of persons or organizations who has some interest in the company's business. You can create a business partner in different business partner roles. During the course of the business relationship, the BP can assume other business partner roles. You do not need to create the general data, which is the same for all BP functions. Due to this, you can use the same BP for different applications. For example, you can reach business partner with number 10000 as a customer in a customer role and as a vendor in a vendor role. In this way, it can play multiple roles.

Master data synchronization synchronizes master data objects in an SAP system that are similar from a business, but not from a technical, point of view, and in this way allows you to integrate different SAP applications seamlessly in your business processes.

For example, you can use master data synchronization to set up integration of the SAP Business Partner with the customer master. This allows you to integrate SAP applications that make technical use of the Business Partner in their user interface, and use the customer master as a technical basis in subsequent business processes. Customer/ Vendor Integration for the business partner may be required if you want to use Financial Accounting and SAP Business Partner in parallel.

In the below example we will consider Payer Partner function for the automatic creation of Business Partner and use the same number ranges as used for Payer Partner. Number ranges play an important role here as the number ranges should be same for Customer and Business Partner for the automatic creation to take place.

The below settings will not only help in automatic creation of Business Partner but also helps in online automatic updation of any changes that you carry out after words either in customer master or in BP master. This helps in elimination of duplication and saves lot of time.

Procedure

Step 1 – Customer Settings

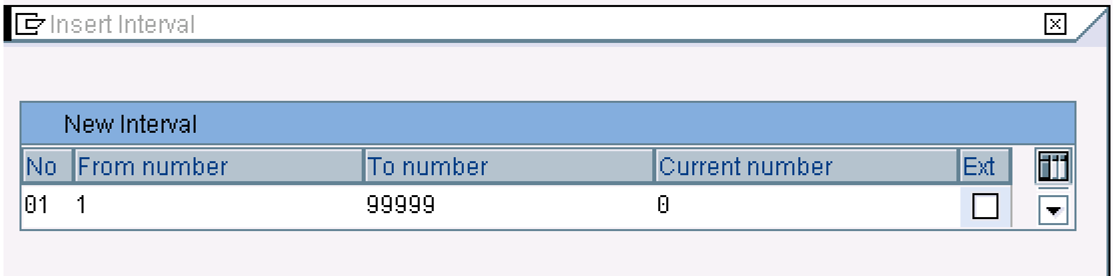
Create Number ranges for customer accounts

This transaction can be accessed by the below IMG menu path:

Financial Accounting (New) → Accounts Receivable and Accounts Payable → Customer Accounts → Master Data → Preparations for Creating Customer Master Data → Create Number Ranges for Customer Accounts (XDN1)

Click on Change Interval Intervals and then click on Insert Intervals Interval

Add the number range details as below



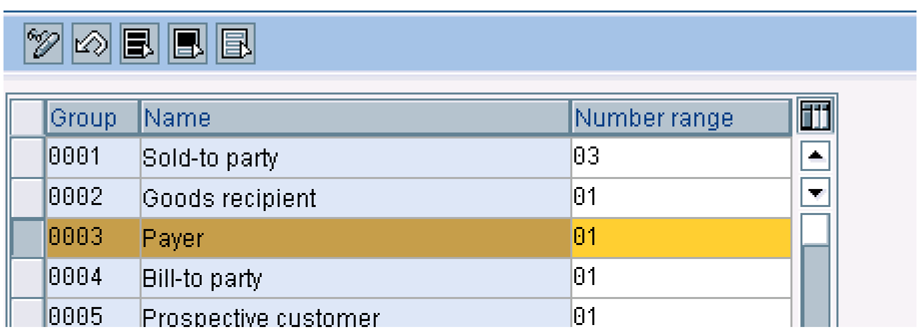
No	From number	To number	Current number	Ext
01	1	99999	0	

Assign Number ranges to Customer Groups

This transaction can be accessed by the below IMG menu path:

Financial Accounting (New) → Accounts Receivable and Accounts Payable → Customer Accounts → Master Data → Preparations for Creating Customer Master Data → Assign Number Ranges to Customer Account Groups

Assign above created number range to the required customer group



Group	Name	Number range
0001	Sold-to party	03
0002	Goods recipient	01
0003	Payer	01
0004	Bill-to party	01
0005	Prospective customer	01

Step 2 – Business Partner Settings

Define BP Roles

Business Partner Role can be used to carry out a business classification of a business partner.

The basis for the definition of a business partner role is a business transaction. The attributes of the BP role depend on the particular transaction involved. The data that is available for a transaction also depends on the business partner category.

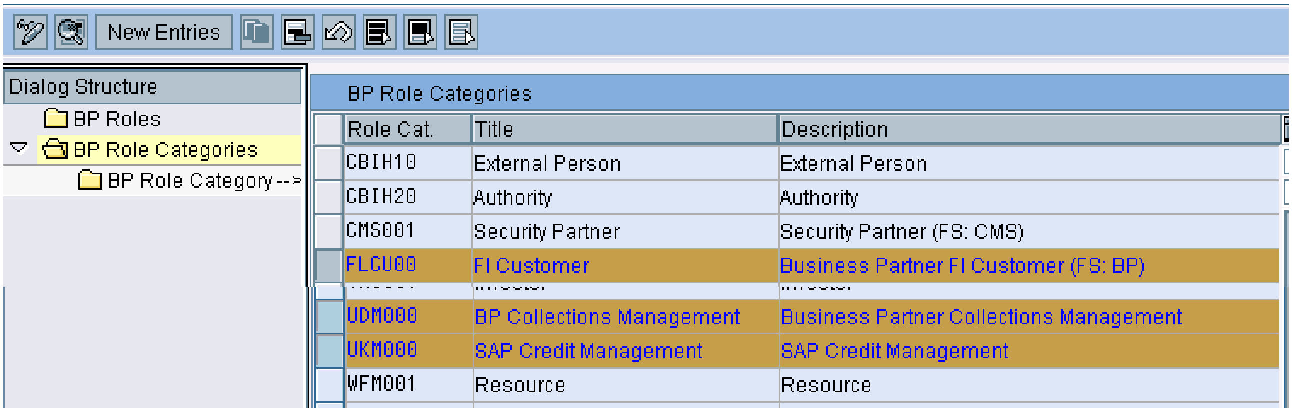
Since we are creating the Business Partners for FSCM, we will consider the below mentioned SAP standard BP Roles and BP Roles categories and do the settings.

This transaction can be accessed by the below IMG menu path:

Cross-Application Components → SAP Business Partner → Business Partner → Basic Settings → Business Partner Roles → Define BP Roles

BP Role Categories -

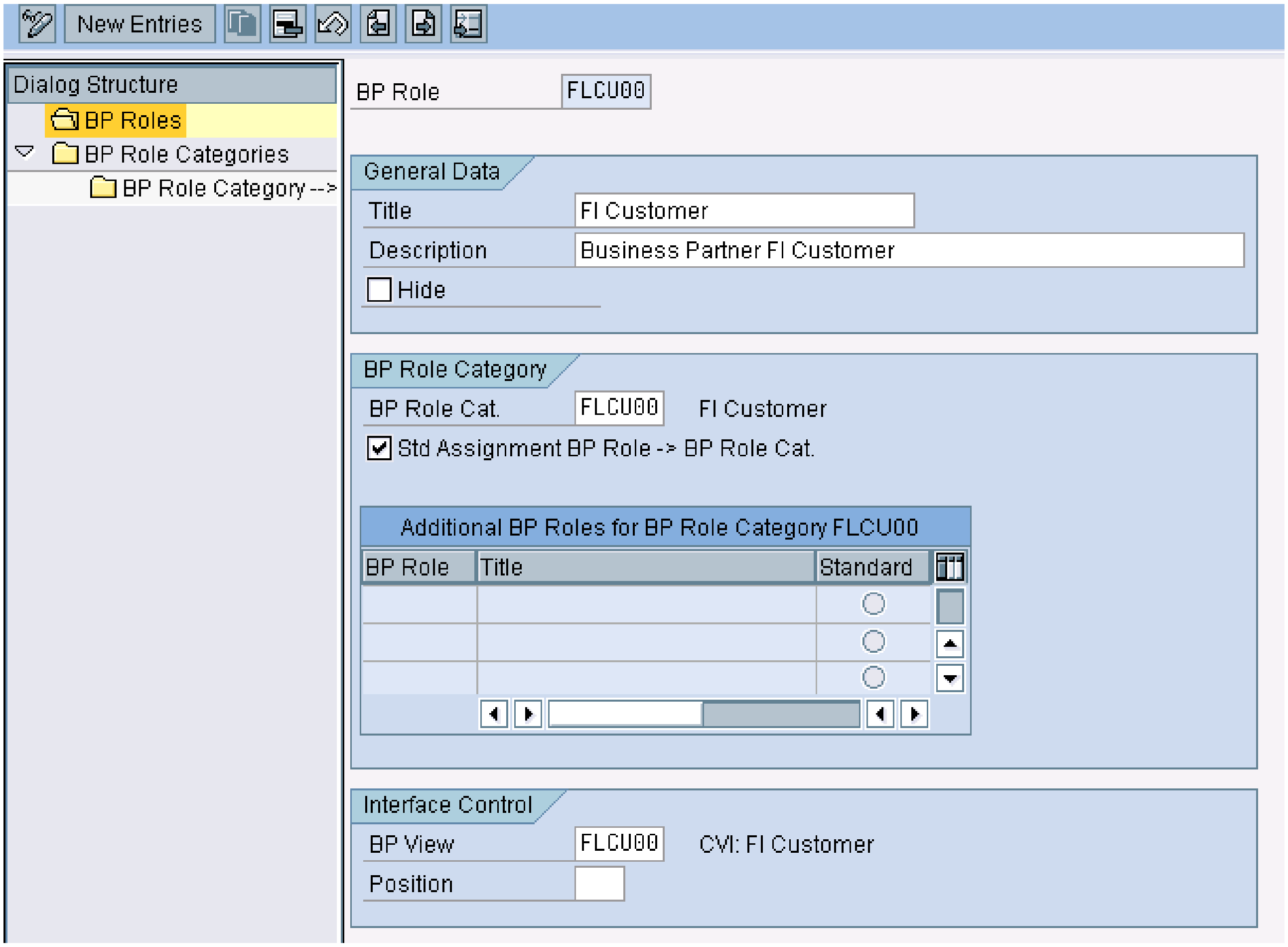
Before proceeding for the BP role settings, to view the BP Role Category details, select the required BP Role Category and click on the Details button 



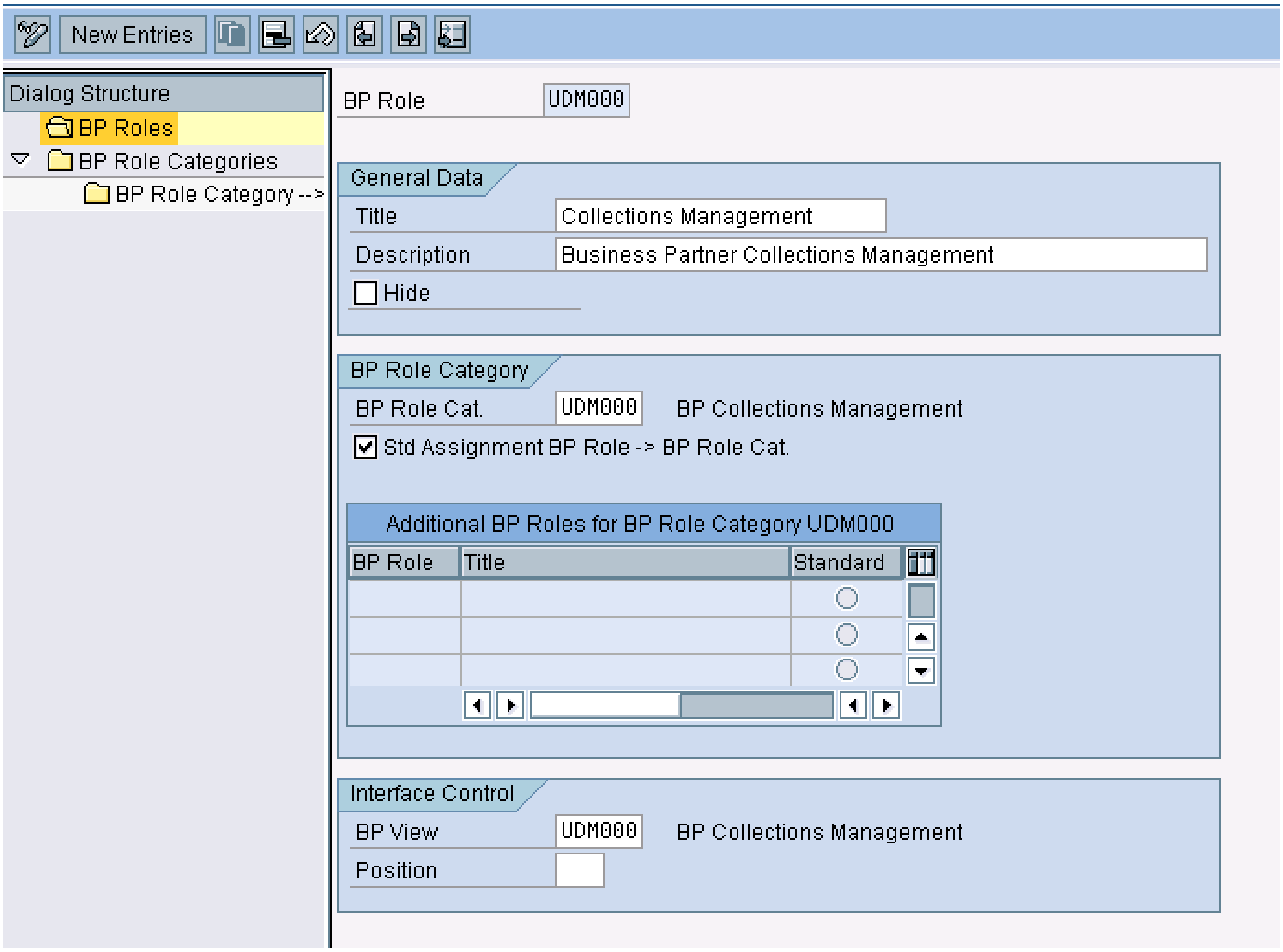
The BP Role settings -

Select the required BP Role and click on the Details button

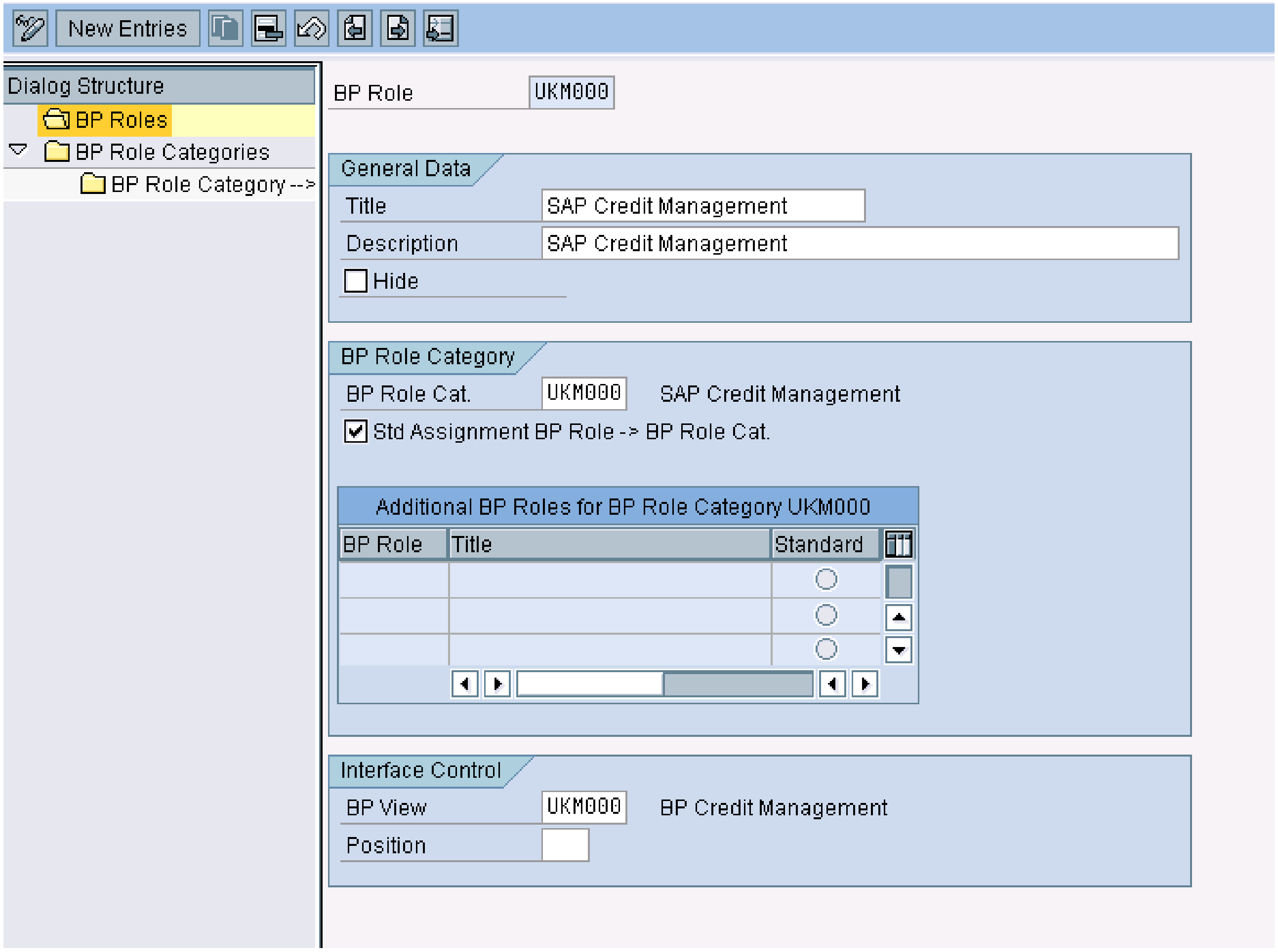
Settings for the BP Role - FLCU00 (FI Customer) should be as shown below:



Settings for the BP Role - UDM000 (Collections Management) should be as shown below:



Settings for the BP Role - UKM000 (SAP Credit Management) should be as shown below:



Define BP Number ranges

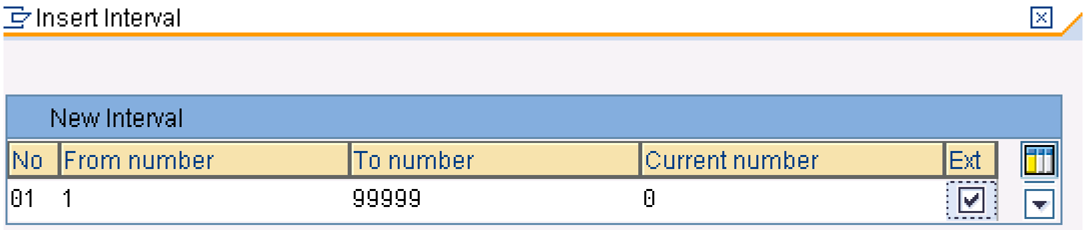
This transaction can be accessed by the below IMG menu path:

Cross-Application Components → SAP Business Partner → Business Partner → Basic Settings → Number Ranges and Groupings → Define Number Ranges (BUCF)

Click on Change Interval 

and then click on Insert Intervals 

and input the required number range details



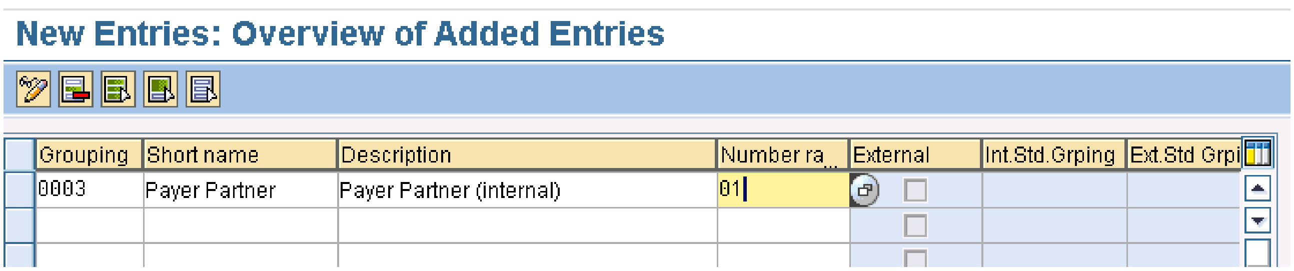
As explained initially, the BP number range should be same as of customer (Payer). Also the External Numbering should be marked  as the BP is created automatically with the same number of customer when the customer master is created.

Define Groupings and Assign Number ranges

This transaction can be accessed by the below IMG menu path:

Cross-Application Components → SAP Business Partner → Business Partner → Basic Settings → Number Ranges and Groupings → Define Groupings and Assign Number Ranges

Click New Entries button and add Payer Partner group details and assign above created BP Number ranges to it.



Step 3 - Synchronization Settings

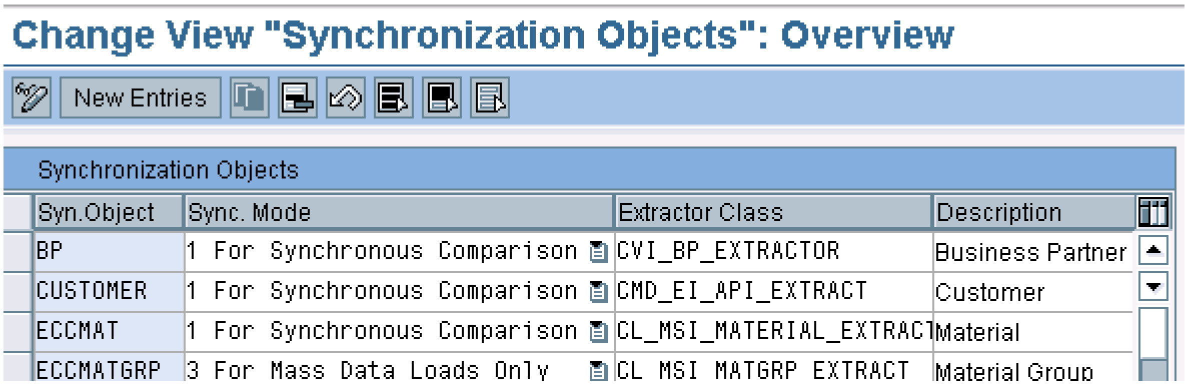
Synchronization Objects

This transaction can be accessed by the below IMG menu path:

Cross-Application Components → Master Data Synchronization → Synchronization Control → Synchronization Control → Synchronization Objects

In this IMG activity you can display synchronization objects provided by SAP for the master data synchronization

Do not change anything here



Change View "Synchronization Objects": Overview

New Entries

Synchronization Objects

Syn.Object	Sync. Mode	Extractor Class	Description
BP	1 For Synchronous Comparison	CVI_BP_EXTRACTOR	Business Partner
CUSTOMER	1 For Synchronous Comparison	CMD_EI_API_EXTRACT	Customer
ECCMAT	1 For Synchronous Comparison	CL_MSI_MATERIAL_EXTRACT	Material
ECCMATGRP	3 For Mass Data Loads Only	CL MSI MATGRP EXTRACT	Material Group

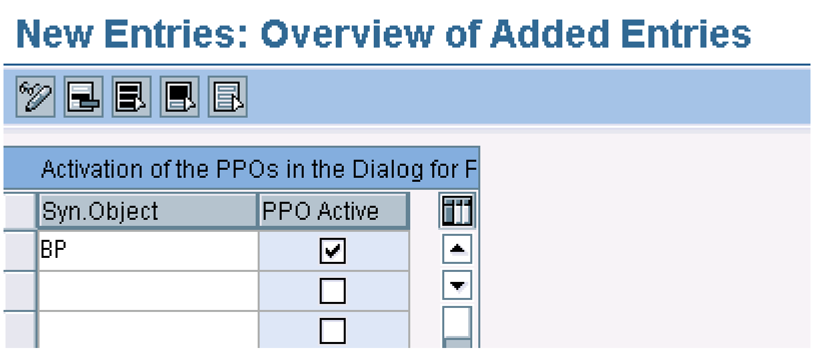
Activate Post Processing Office requests

Use this IMG activity to define for which platform objects a post-processing order should be written in the event of a synchronization error. This definition is not direction-specific, that means a request is always written when the platform object is used either as a source or as a target object in the synchronization. Since we are creating BP from customer, the BP becomes the platform object here. So add BP in this setting.

This transaction can be accessed by the below IMG menu path:

Cross-Application Components → Master Data Synchronization → Synchronization Control → Synchronization Control → Activate PPO Requests for Platform Objects in the Dialog

Click New Entries and add Synchronization object as BP and check PPO as active



New Entries: Overview of Added Entries

Activation of the PPOs in the Dialog for F

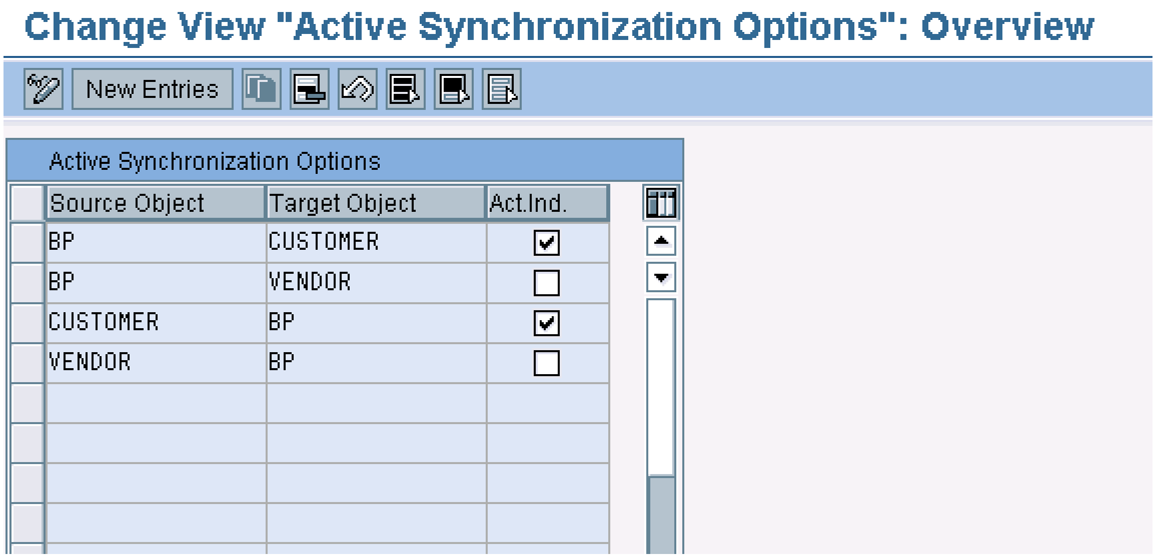
Syn.Object	PPO Active
BP	☑
	☐
	☐

Activate Synchronization Options

This transaction can be accessed by the below IMG menu path:

Cross-Application Components → Master Data Synchronization → Synchronization Control → Synchronization Control → Activate Synchronization Options

Select the required source objects and target objects and mark Active. Since we are creating BP from customer select Customer → BP here



Source Object	Target Object	Act.Ind.
BP	CUSTOMER	☑
BP	VENDOR	☐
CUSTOMER	BP	☑
VENDOR	BP	☐

If you want the data to be updated from BP to customer then check BP → Customer as Active

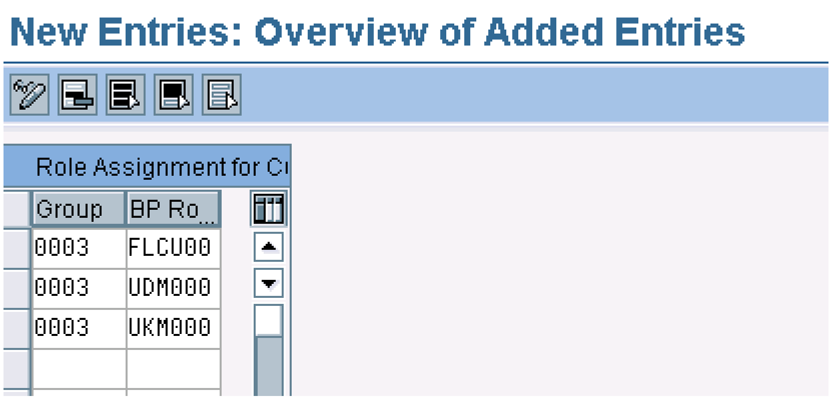
Assign BP roles to Customer Account Group

In this IMG activity you assign BP roles that we decided in BP settings to the account group for the customer master record in which the business partner is to be created when processing the customer. When you process the customer as part of customer integration the system creates a business partner with the relevant account group in the BP roles that are assigned to this account group.

This transaction can be accessed by the below IMG menu path:

Cross-Application Components → Master Data Synchronization → Customer/Vendor Integration → Business Partner Settings → Settings for Customer Integration → Define BP Role for Direction Customer to BP

Click on New Entries button and add group and the BP Roles that we need.



Group	BP Ro...
0003	FLCU00
0003	UDM000
0003	UKM000

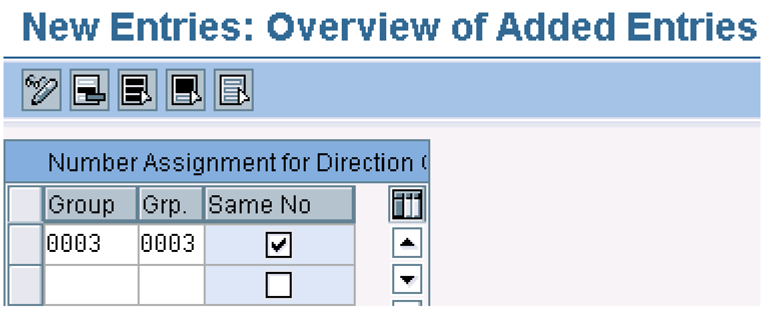
Define Number assignment

In this IMG activity you assign the BP groupings to the customer master account groups to ensure that when you process customers as part of customer integration the system also updates the business partner at the same time.

This transaction can be accessed by the below IMG menu path:

Cross-Application Components → Master Data Synchronization → Customer/Vendor Integration → Business Partner Settings → Settings for Customer Integration → Field Assignment for Customer Integration → Assign Keys → Define Number Assignment for Direction Customer to BP

Click on New Entries and add BP group and customer group



With this assignment you choose whether the customer master record is to be created with an account group with internal or external number assignment or with identical numbers. Since the BP number range is set as external in the above steps, the BP number here should marked Same Number to get the same number as of customer

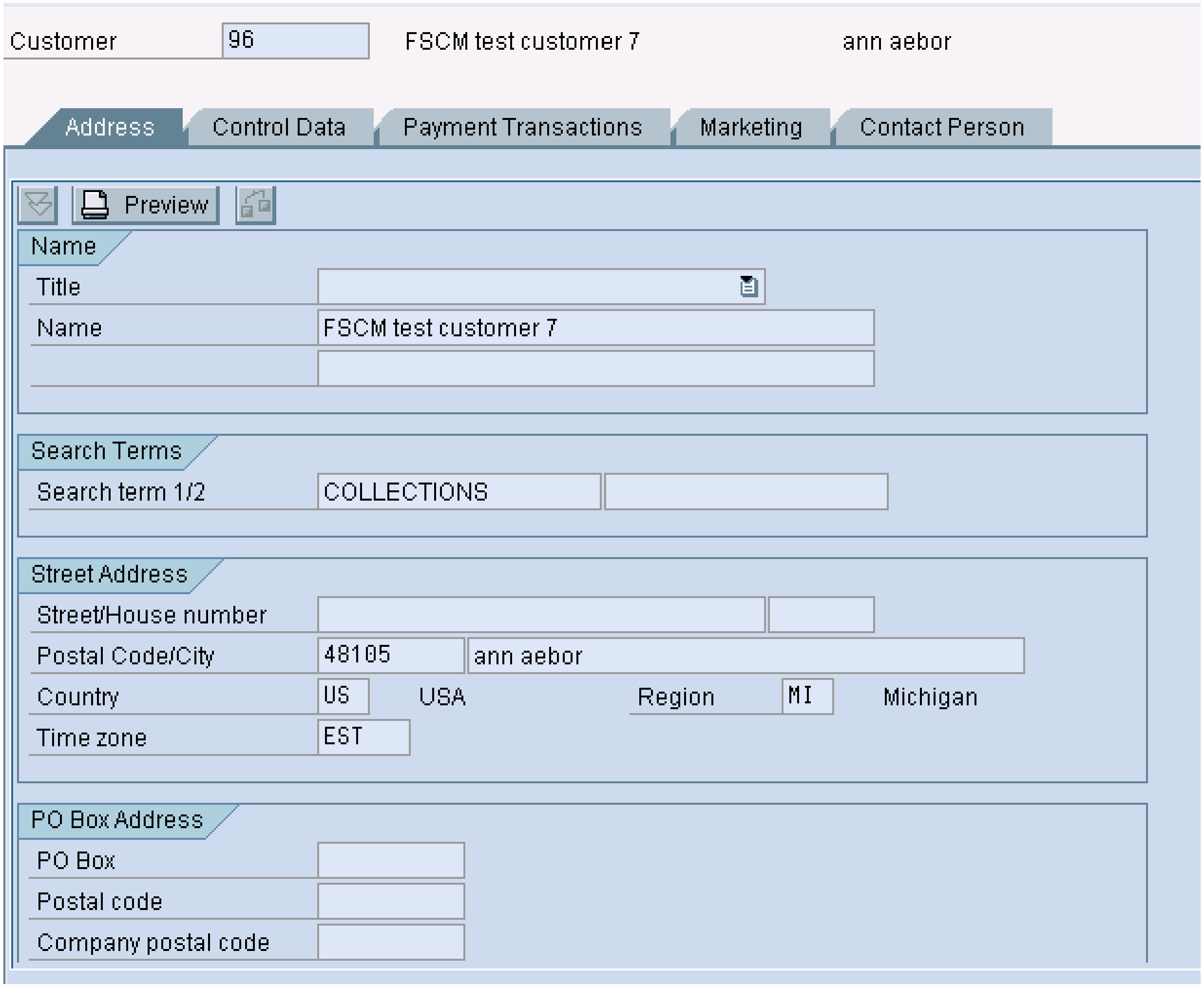
By this we are done with settings and this can be tested as explained below

Testing

Create Customer master using XD01

This transaction can be accessed by the below Easy Access:

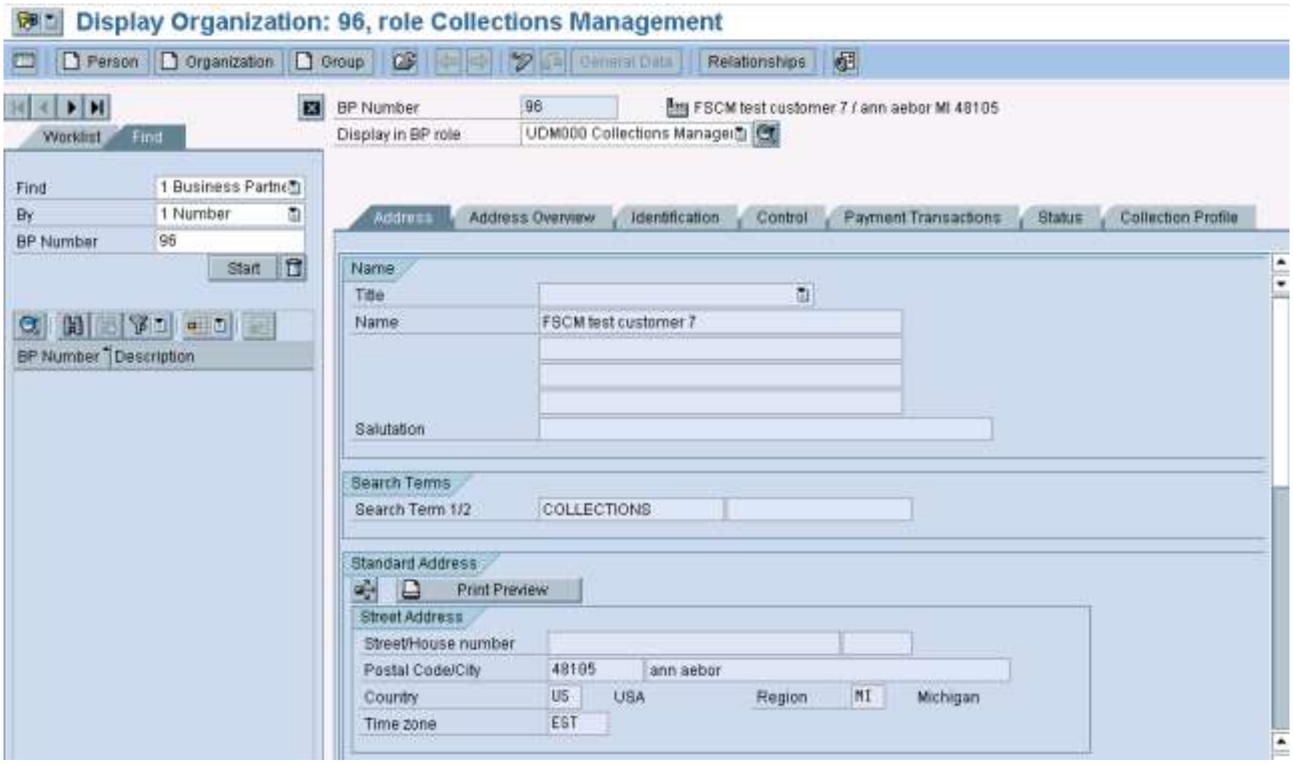
Accounting → Financial Accounting → Accounts Receivable → Master Records → Maintain Centrally → Create (XD01)



The Business Partner is automatically created in FSCM with the same customer number and same data as created above.

This transaction can be accessed by the below Easy Access:

Accounting → Financial Supply Chain Management → Collections Management → Master Data → Business Partner Master Data (UDM_BP)



Related Content

[Business Partner]

[Master data Synchronization]

[FSCM – Collections Management]

For more information, visit the [Enterprise Resource Planning]

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