



How-To Guide: CRM via E-Mail Tool Set

SAP[®] CRM 7.0

Target Audience

- System administrators
- Technology consultants

Document version: 1.0 – December 2008



SAP AG
Dietmar-Hopp-Allee 16
69190 Walldorf
Germany
T +49/18 05/34 34 24
F +49/18 05/34 34 20
www.sap.com

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EXAMPLE TEXT	Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE.
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1 Introduction

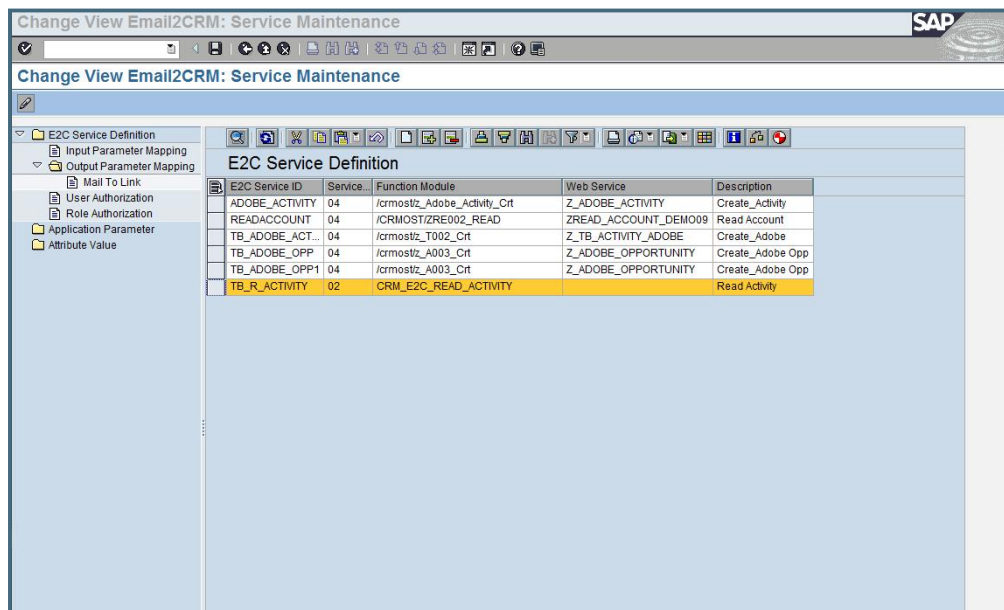
With the CRM via E-Mail application, SAP CRM offers you an easy way to provide your field force with up-to-date business data.

You can search for, read, and create transactional and master data by sending and receiving e-mails to and from the CRM system. The CRM via E-Mail application is based on standard e-mail technology, so it does not require any significant additional investment, and the application can be used from your Blackberry or other e-mail enabled devices.

The application provides two main functions:

- The mobile e-mail scenario which enables you to communicate with the SAP CRM back-end in an easy way by using e-mails.
- The SAP Interactive Forms by Adobe (IFbA) scenario through which you can create business data in an Adobe form and send it to the SAP CRM system. The CRM via E-Mail tool extracts the data and creates or updates the back-end accordingly.

1.1 CRM via E-Mail Tool Set



E2C Service ID	Service	Function Module	Web Service	Description
ADOBE_ACTIVITY	04	/crmstz_Adohe_Activity_Crt	Z_ADOBE_ACTIVITY	Create_Activity
READACCOUNT	04	/CRMSTZRE002_READ	ZREAD_ACCOUNT_DEMO09	Read Account
TB_ADOBE_ACT...	04	/crmstz_T002_Crt	Z_TB_ACTIVITY_ADOBE	Create_Adobe
TB_ADOBE_OPP	04	/crmstz_A003_Crt	Z_ADOBE_OPPORTUNITY	Create_Adobe Opp
TB_ADOBE_OPP1	04	/crmstz_A003_Crt	Z_ADOBE_OPPORTUNITY	Create_Adobe Opp
TB_R_ACTIVITY	02	CRM_E2C_READ_ACTIVITY	Z_ADOBE_OPPORTUNITY	Read Activity

To open the CRM via E-Mail tool set, go to Customizing for *Customer Relationship Management* under *Basic Functions* → *CRM via E-Mail* → *CRM via E-Mail: Service Maintenance* or start transaction E2C.

Users can create their own service objects, define the input and output parameters, and can assign the services to users or roles. For the Adobe scenarios, the user also has to maintain the respective information on the used services and can download the required schemas to build the SAP Interactive Forms by Adobe directly from the tool.

1.2 Key Benefits

A sales representative on his way to the customer could send a request to the SAP CRM system to get the customer address data. The system would identify the user, check the authorization rights, and send the requested data back to the sales representative via e-mail.

Similarly, the user could send an Adobe form to the system and the system would create or update the respective data in the back-end.

The main benefits of using CRM via E-Mail are the following:

- You can provide your sales force with up-to-date data – at their fingertips.
- You can reach new user groups by providing them with an option to communicate with the SAP CRM system without the need of a standard system access and without additional costs.
- You can use your standard mobile devices with e-mail client to access critical business data from anywhere.
- You can use SAP IFbA to build user-friendly offline scenarios that allow your users to capture or update data in a non-connected environment, and update them by just sending an e-mail to the system.

Since the CRM via E-Mail application is built on standard e-mail technology, no additional significant investment is required, assuming e-mail enabled mobile devices are already in use and e-mail security is guaranteed.

Since you can build your own interfaces (function modules), you have the flexibility to provide all kinds of scenarios to support your business processes.

1.3 Key Features

The CRM via E-Mail tool is new with SAP CRM 7.0 and provides a tool set that allows you to build CRM via E-Mail services based on function modules and Web services.

- Use any mobile devices with email client to communicate with your SAP CRM back-end to retrieve up-to-date information or to create business data
- Create or update business data in SAP Interactive Forms by Adobe offline and send the form to the CRM back-end for automated updates
- Use the user-friendly workbench to build and maintain your CRM via E-Mail services based on function modules as you need them
- Assign individual users or roles to your services

With the new CRM via E-Mail tool set you can easily create lean mobile e-mail and SAP Interactive Forms by Adobe scenarios.

You can call these services by sending an e-mail from a mobile device to the SAP CRM system.

2 CRM via E-Mail Tool Set

2.1 Basic Characteristics

The CRM via E-Mail tool set supports the following two scenarios:

- Mobile e-mail scenario
- SAP Interactive Forms by Adobe scenario

The mobile e-mail scenario allows you to create queries for data, to read data, and to create data. By using the respective services from a mobile device, you can e.g. first search for a customer, then read the details of the customer contact to find out their mobile number, and finally create a follow-up activity.

By using SAP Interactive Forms by Adobe services, you can create or update data and send them to the SAP CRM system as e-mail attachments as soon as you are online.

With the CRM via E-Mail tool set, you can assign default values to your services, such as technical data or text, based on your individual use cases. You can also use calculated values such as "last week" or "next week" which help you to define user-friendly query services. Furthermore, the tool allows you to link an object ID from a service reply to another service in order to request the respective details.

The CRM via E-Mail tool set leverages the SAP CRM E-Mail Response Management System and SAP Connect by NetWeaver. Services for the tool are built on function modules that can be easily created to meet your individual needs. Defining services is easy and user-friendly. You can give authorization to the services based on roles or users.

2.2 Selected Use Cases

Selected use cases for the CRM via E-Mail tool are the following:

- Before a customer meeting
 - A sales representative uses the tool to receive customer data and check open leads or service tickets before meeting a customer.
- After a customer meeting
 - A sales representative uses the tool to create customer data, new leads and opportunities, or follow-up activity after meeting a customer.
- After fixing an issue
 - A service representative uses the tool to create a service confirmation or to close a service ticket using SAP Interactive Forms by Adobe after solving a customer issue.

2.3 Defining a New Service Object

You can create and maintain CRM via E-Mail objects in Customizing for Customer Relationship Management under *Basic Functions* → *CRM via E-Mail* → *CRM via E-Mail: Service Maintenance*. Alternatively, you can start the CRM via E-Mail tool by calling transaction E2C.

2.3.1 Create and Maintain CRM via E-Mail Objects

1. On the *Service Maintenance* screen, go to *E2C Service Definition*.
2. Choose *Insert Row*. An empty row is added to the list of service definitions.
3. Enter a service ID for your new service definition.

4. In the *Service Type* column, select the type you want to use:
 - 01: Search
 - 02: Read
 - 03: Create
 - 04: Adobe Service
5. Select the respective function module.
For Adobe services, select the respective Web service as well.
6. Add a description, which will be shown in the e-mail later.
7. Save your changes.

2.3.2 Input Parameters

Input parameters appear as input fields in your e-mail templates or Adobe forms.

1. To maintain the input parameters of a CRM via E-Mail service, select a service from the *E2C Service Definition* list and go to *Input Parameter Mapping*. A list with all attributes that are available in the function module appears. Input parameters
2. Select the attributes you want to use in your CRM via E-Mail service.
3. Enter a reference ID if required. These reference IDs will be used in your CRM via E-Mail scenarios.
4. Assign default or calculated attribute values based on your scenarios for better usability.
5. In the *Description* column, you can provide information to the user.
6. Save your changes.

2.3.3 Output Parameters

Output parameters are shown in the confirmation e-mail that you receive after your data has been created in the SAP CRM system.

1. To maintain the output parameters of a CRM via E-Mail service, select a service from the *E2C Service Definition* list and go to *Output Parameter Mapping*. A list with all attributes that are available in the function module appears.
2. Select the attributes you want to be shown in the e-mail reply.
3. Enter a reference ID if required.
4. In the *Link To Service* column, you can assign services to which you want the reply e-mail to link.
5. Add an attribute to the e-mail subject for better usability if required.
6. Save your changes.

2.3.4 User Authorization

After defining your service, you have to assign users or roles to it. Only users who are maintained in the tool, or assigned to a chosen role, are able to use the service.

To check available services, a user can send a “?” to the system. The system returns a list of the services the user is authorized to use.

2.3.5 Adobe Scenarios

You create an Adobe Service like any other CRM via E-Mail service in the *E2C Service Definition* list.

1. Select *04 Adobe Service* as service type. In addition to the function module, you have to assign a Web service to your object.
2. Select the service and choose the respective report to generate the Web service schema that is required to create forms:
 - *Download Schema for WST based WS*
 - *Download Schema for RFC based WS*
3. On the *Program E2C_DOWNLOAD_RFC_SCHEMA* (*E2C_DOWNLOAD_CRT_SCHEMA* for WST based Web services) screen, enter the path for the WSDL (Web Services Description Language) of your service and for the schema you want to create to download the files.
4. Create a new form using the Adobe Lifecycle Designer by importing the generated Web service schema file.
5. Design your form and add a *Submit by Email* pushbutton.

The SAP Interactive Form by Adobe extracts its data to an XML file when you click *Submit by Email*. The structure of the XML file is the same as the Web service structure and can be interpreted by the CRM via E-Mail tool set.

6. Assign the CRM via E-Mail service name as e-mail subject and the standard CRM via E-Mail e-mail address to the settings of the *Submit by Email* pushbutton.

3 Mobile E-Mail Scenario

3.1 General Scenario Overview

3.1.1 User Point of View

Users can easily search for, retrieve, and create business data in SAP CRM by using their mobile devices:

- Request a list of available services
Users can request a list of services that are available for them by sending a “?” to the system. The CRM via E-Mail system provides a list of all services the user is authorized to use.
- Use or request templates
Users can request a template by adding a “?” to the service name and sending this to the system. The CRM via E-Mail system provides a template with the respective attributes that should be given to call the services to the user.
- Use *Link To Service* functionality
By clicking on a provided hyperlink in a response e-mail, users can request further details, such as account address data

3.1.2 IT Manager Point of View

IT managers can easily create and maintain CRM via E-Mail service objects:

- Create and maintain services
IT managers can create and maintain services in the CRM via E-Mail tool set by using function modules as a basis and choosing relevant service input and output attributes.
- Assign services to users
IT managers can assign a service directly to users or to roles.
- Maintain response e-mail
IT managers can maintain response e-mails by defining output attributes or adding attributes to the e-mail subject line for better usability.
- Create *Link To Service* functionality
IT managers can provide *Link To Service* functionality to ensure a smooth navigation to detailed data, for instance, from an activity to the details of the involved account.



Note

The *Link To Service* functionality might not be supported by all devices.

3.2 Use Case

You are out of office but urgently need to check on your customer activities. Since you cannot access the standard SAP CRM system at that moment, you can use CRM via E-Mail with your mobile device to search for the activities.

1. Request a list of your services by sending a “?” to the CRM system if you do not know the service name to search for your activities.

The system sends you a list of all services which you are authorized to use.

2. Choose the service to search for activities.

By clicking on the link, a new e-mail template with the needed values already entered opens automatically.

3. Send this e-mail to the backend to request the right template to search for your activity.

You automatically receive the search template to search for your activities.

In the following example, you can search by priority and/or the activity description:



The IT manager has provided information on the attribute values you have to enter to search by priority – 1 for *Very High* and 2 for *High*. This makes it easier for you because you do not need to type whole words but can enter a number.

You can store the template on your mobile device for future use. This way, you do not have to request it from the system every time.

4. Enter the search string *Ado** to search for your activities starting with *Ado* and send the request.

The system sends you a list of all activities that meet the search criteria.

5. To see the details of the respective activity, use the *Link To Service* functionality by clicking on the link.

The respective template opens automatically.

6. Send the request for activity details to the backend.

You receive the details for your activity via e-mail.

4 SAP Interactive Forms by Adobe Scenario

4.1 General Overview

4.1.1 User Point of View

Users can create business data offline in a SAP Interactive Form by Adobe and send it to the SAP CRM backend via e-mail later.

- Create transactional data
Users can create transactional data, such as leads or customer visit reports, offline in a SAP Interactive Form by Adobe template.
- Create master data
Users can create master data, such as contacts or prospects, offline in a SAP Interactive Form by Adobe template.
- Update business data
Users can update data, such as service ticket status or opportunities, offline in a SAP Interactive Form by Adobe.
- Store data locally on and send it when required
Users can store the SAP Interactive Form by Adobe on a laptop, update it or rework it, and only send it when finalized.

When creating or updating data with an Adobe form the user does not send the complete form but an XML extract of it. This is done automatically by the Adobe form.

The CRM via E-Mail system extracts the data from the XML extract and updates the backend accordingly. Users can also first store the data in the adobe form and trigger the update process when required. This allows you to build lean offline applications for your field force, but also in a partner context.

4.1.2 IT Manager Point of View

IT managers can easily create and maintain Adobe objects in CRM via E-Mail:

- Create and maintain services
IT managers can create and maintain Adobe services in the CRM via E-Mail tool set by using function modules and respective Web services.
- Assign services to users
IT managers can assign services directly to users or roles.
- Maintain response e-mail
IT managers can add service attributes to response e-mails and select needed attributes for better usability.
- Create Forms with Adobe Lifecycle Designer
IT managers can create needed forms with Adobe Lifecycle Designer based on respective Web services.
- Leverage CRM Web Service Tool

IT managers can use WST to create needed interfaces.

 Note

SAP does not guarantee to keep your individual interfaces stable.

To create the necessary Adobe forms, CRM via E-Mail provides two transactions (reports) that can be used to download the respective schemas directly from the CRM via E-Mail tool set. The schemas are used to ensure that the Adobe form has the correct structure that is required to map the data correctly back to the SAP CRM system and are derived directly from the Web service that has to be given in the tool, alongside the function module.

4.2 Use Case

You are at a customer site and you want to create a service confirmation after having solved a customer issue. Since you cannot access the standard SAP CRM system at the moment, you can use CRM via E-Mail and an SAP Interactive Form by Adobe to collect the respective data.

1. Create a new form and enter the required data. Some fields can already be filled in, for example with service order details.
2. Choose *Submit by Email* on the form.

The Adobe form opens an e-mail with the subject already entered and automatically attaches an XML extract with all necessary data from your service confirmation.


3. Do not change anything and send the e-mail to the SAP CRM system.

Your work is done here. Everything else will be done automatically in the background.

When you synchronize your e-mails next time, you see that the e-mail has been sent to the SAP CRM system, the XML form has been extracted by the CRM via E-Mail tool set, and the service confirmation has been created. You receive a response e-mail with the selected output parameters and a service confirmation ID. For your convenience, the IT manager has also added the service confirmation ID to the subject line of the e-mail.

5 CRM via E-Mail Tool Setup

5.1 General Overview

- SAP CRM E-Mail Response Management System
The CRM via E-Mail tool set uses the E-Mail Response Management System.
- User Authorization for Services
CRM via E-Mail services are assigned to single users and roles at design-time. The general CRM authorization is applied automatically by the CRM via E-Mail tool set while responding to a service request at run-time.
- Security
The CRM via E-Mail tool set is based on SAP Connect (NetWeaver). A secure e-mail proxy providing digital signature and encryption features for maximum security has to be implemented to run the scenario securely according to local legal regulations.
- Function Modules
CRM via E-Mail services are built on customer function modules. These function modules have to have a defined signature (input and output parameters).
 **Note**
The SAP CRM Web Service Tool can be leveraged to provide needed interfaces. However, SAP does not guarantee the stability of those customer individual interfaces.
- Business Partner Roles
The general e-mail scenario is supported for the business partner role *Employee*. Users have to be assigned to this role, and their user and e-mail IDs have to be maintained properly. In addition, the Adobe scenarios support the channel partner role. The user IDs of the channel partners have to be maintained as Internet user IDs.

5.2 Adobe Scenario Specifics

- Schema Reports
Two reports to create the needed schemas from the Web service WSDLs are provided to create the respective Adobe forms. The reports can be accessed in the CRM via E-Mail tool set.
One report is to create the schema for standard function modules; the other report is to create schemas for function modules that have been created in the SAP CRM Web Services Tool.
Schema guidelines have to be followed.
- Web Services
For each Adobe scenario, a function module and a respective Web service are required. Web services have to be created based on the function modules using the SAP NetWeaver Web Services Wizard or the SAP CRM Web Service Tool.
- SAP Interactive Forms by Adobe License
An SAP Interactive Forms by Adobe license is required to run the Adobe scenario.

5.3 Setting Up a CRM via E-Mail Scenario

The following prerequisites have to be considered:

- User management
- Security settings

5.3.1 Prerequisites

For the e-mail mobile scenario, users have to be assigned to the business partner role *Employee*. For the Adobe scenario, the role *Channel Partner* is also supported.

The user ID and e-mail have to be maintained in the business partner application for all users. The user ID has to be maintained as *Internet User* for users who are assigned to the role *Channel Partner*.

To ensure secure e-mail communication, make sure you use a secure e-mail proxy that enforces digital signature verification and encryption. Follow the instructions of SAP Note 149926 to configure SAP Connect with a secure e-mail proxy. Additionally, select a third party provider according to the legal regulations of the country where you operate.

For more information on e-mail security, see [SAP Note 149926](#) - *Secure e-mail: Encryption, digital signature*.

5.3.2 Steps to Set Up a CRM via E-Mail Scenario

1. Set up the E-Mail Response Management System and SAP Connect applications where you also maintain the e-mail addresses used for your scenarios.
2. Create your services using the CRM via E-Mail tool set.
3. Assign users or roles to the services.
4. For an Adobe scenario, create and provide the respective SAP Interactive Form by Adobe.