

Version

This article was created by SAP C4C (1702) Version

Brief Description

On this article the subject will be Data Restrictions using Sales Territories on SAP C4C. This feature is quite useful to Sales Solutions to implement data segregations, allowing the Sales Reps view only their Customers.

I hope you enjoy!!

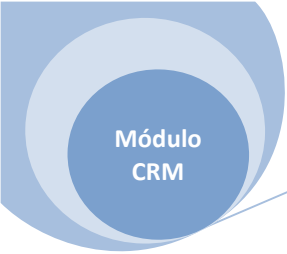
Author

Claudio Goulart, since 1992 has been working with corporative solutions. And in the last 12 years dedicated to implement CRM Solutions, using all the most used CRM Suites of the market. As Vantive, PeopleSoft, Siebel and currently working with SAP since 2008.

Specialist on telecom industries process definitions, implemented CRM on the Call Center, Services, Sales and integration with legacy systems to Pos and Pre-paid on the biggest telecom enterprises in the country.

Extensive knowledge and experience in SAP CRM 2007 and 7.0, on Interaction Center, URA/CTI integrations (Avaya / Alcatel / Altitude), Services, Marketing, Middleware and integration to legacy system using SOA architecture, and SAP and Non-SAP integration.

Knowledge and experience in Cloud Solutions - SAP Cloud for Customer - C4C, on Services, Marketing, Sales and On Premise integration (SAP ECC and SAP CRM) using HCI (Hana Connection Integration) and PI/PO. Also, integrating Cloud environment with E-mail Servers (Outlook, Lotus Notes, Gmail), Social Network (Facebook and Twitter), URA/CTI, and SAP Cloud Application Studio, extending and creation objects to better fit to Customer Business.



Content

- 1. Customization 3
 - 1.1. Description 3
 - 1.2. Sales Territory definition 3
 - 1.3. Configuring Business Role and Territories 4
 - 1.4. Setting Users as Sales Employee from Territories 8
 - 1.5. Testing Data Restriction 9

1. Customization

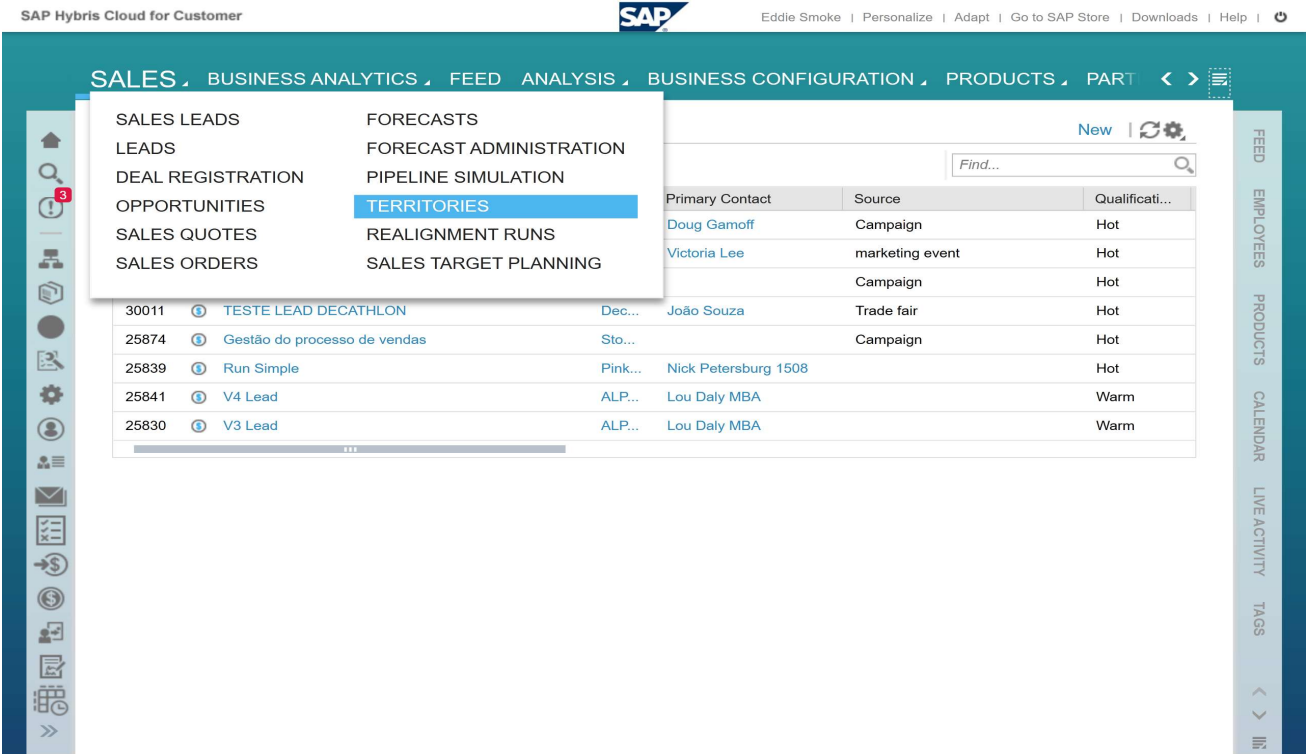
1.1. Description

Data restrictions is very useful to every corporative solution, allowing only necessary permissions to which person in process. On C4C, data restrictions are very flexible feature, and to exemplify to you, I will use Sales Territory to segment Customer data.

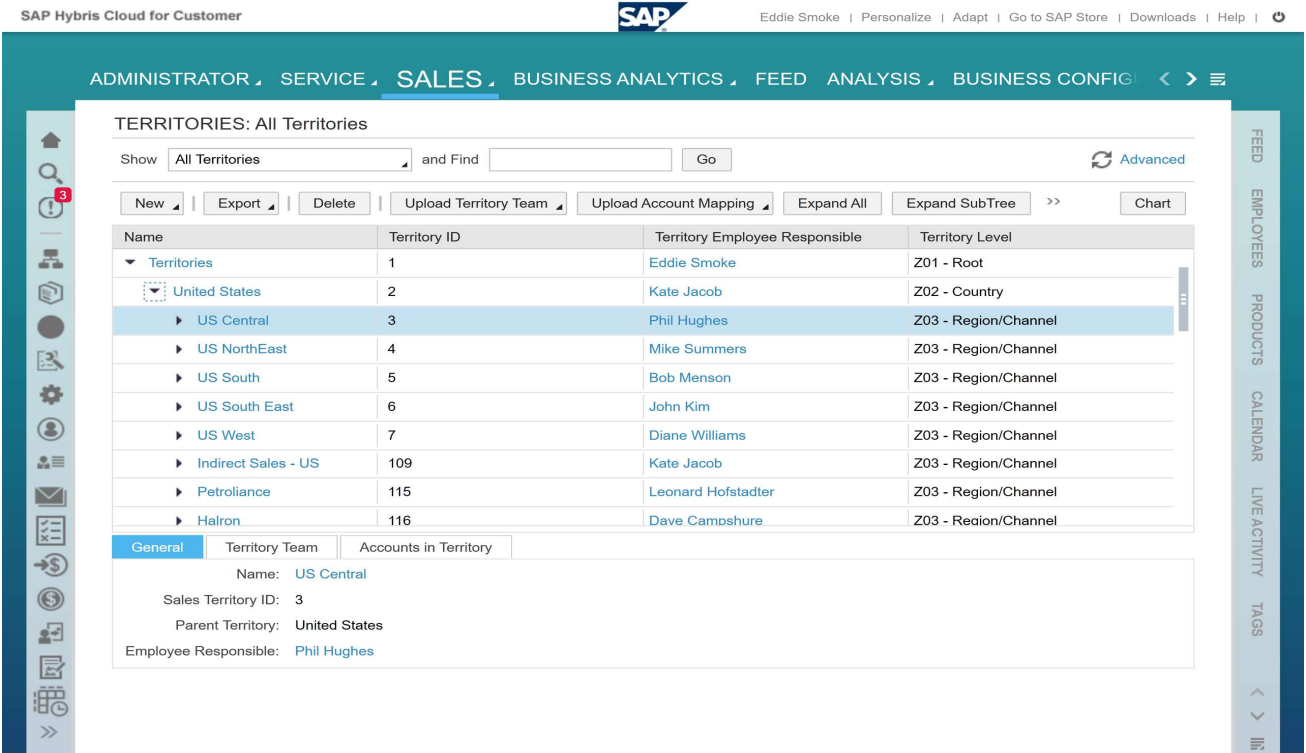
Let's do it!!

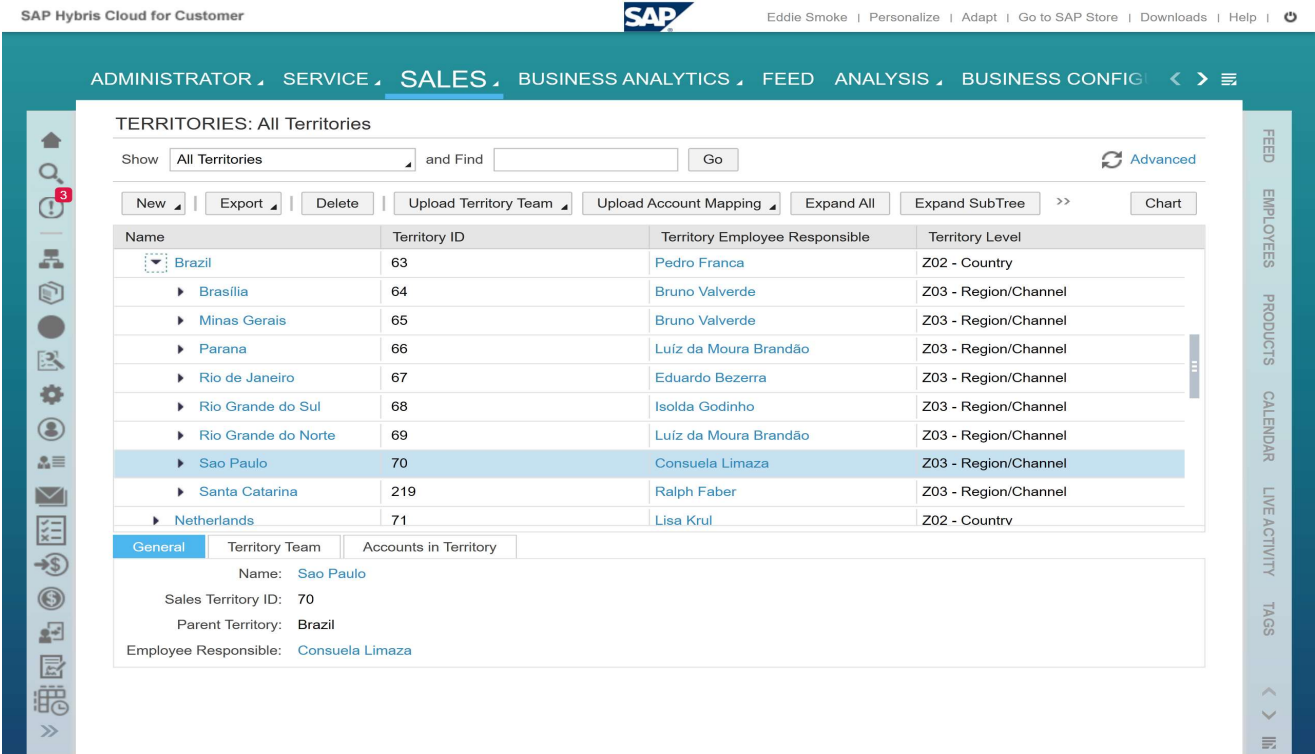
1.2. Sales Territory definition

On link “SALES”, click on “TERRITORIES”



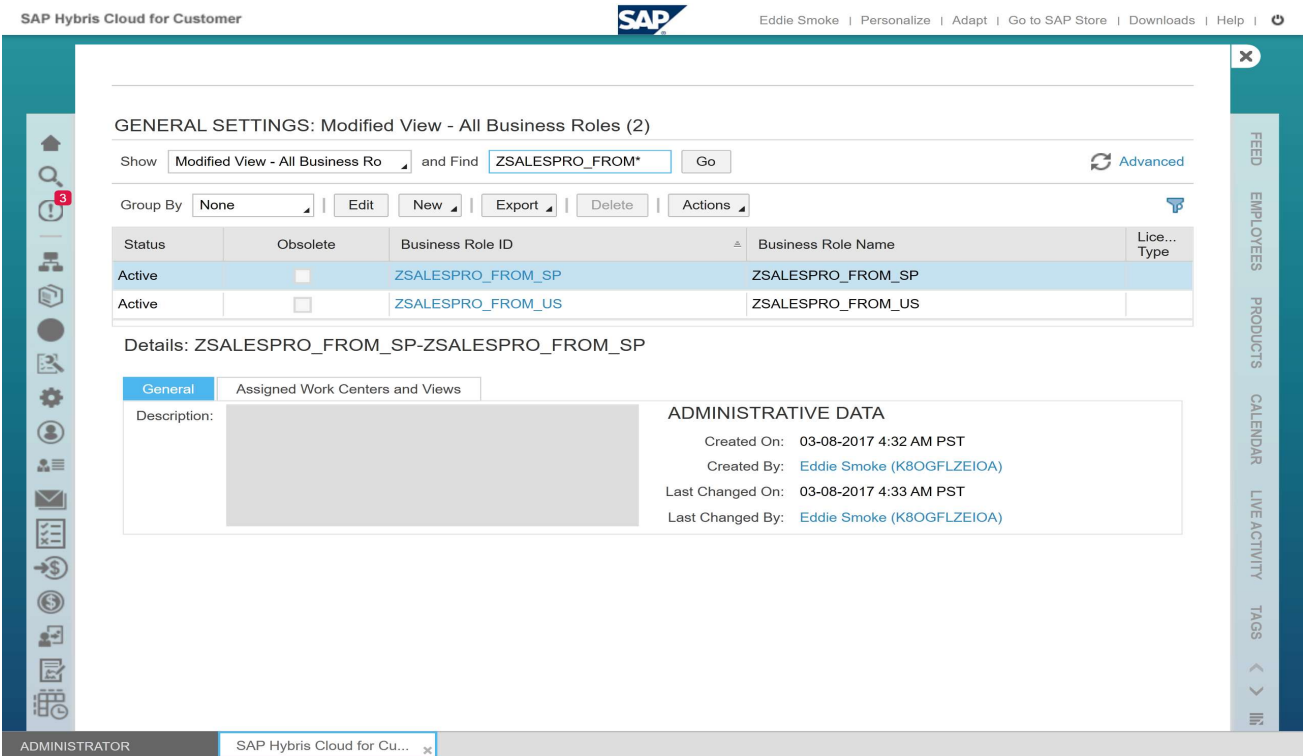
It will list Territories already existent on our environment. Then, to exemplify our article, I will use “US Central” and “BR Sao Paulo”.



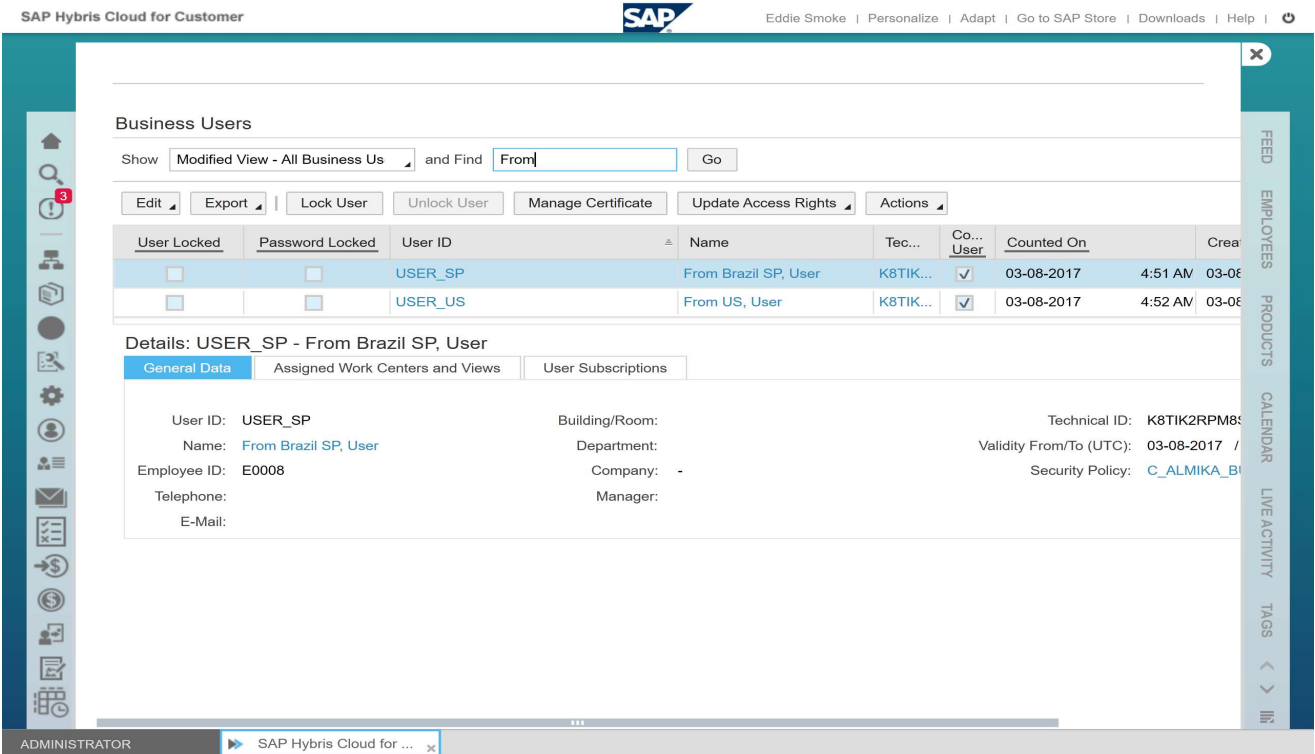


1.3. Configuring Business Role and Territories

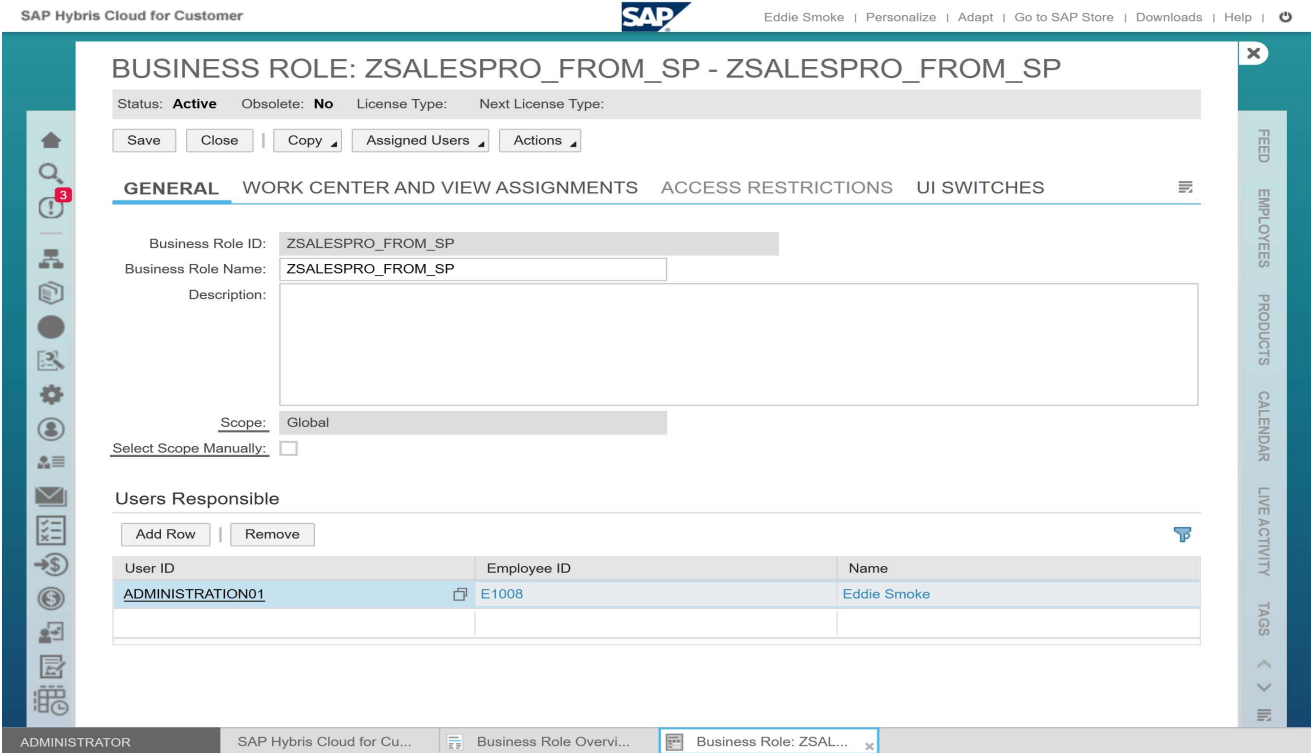
As I mentioned before, we will use “US Central” and “BR Sao Paulo”. Then I created 2 Business Roles listed below.



And 2 users, USER_SP (From Sao Paulo), and USER_US (From US).



Right now, I will define the access restriction using the business role “ZSALESPRO_FROM_SP”. Click on tab “ACCESS RESTRICTION”

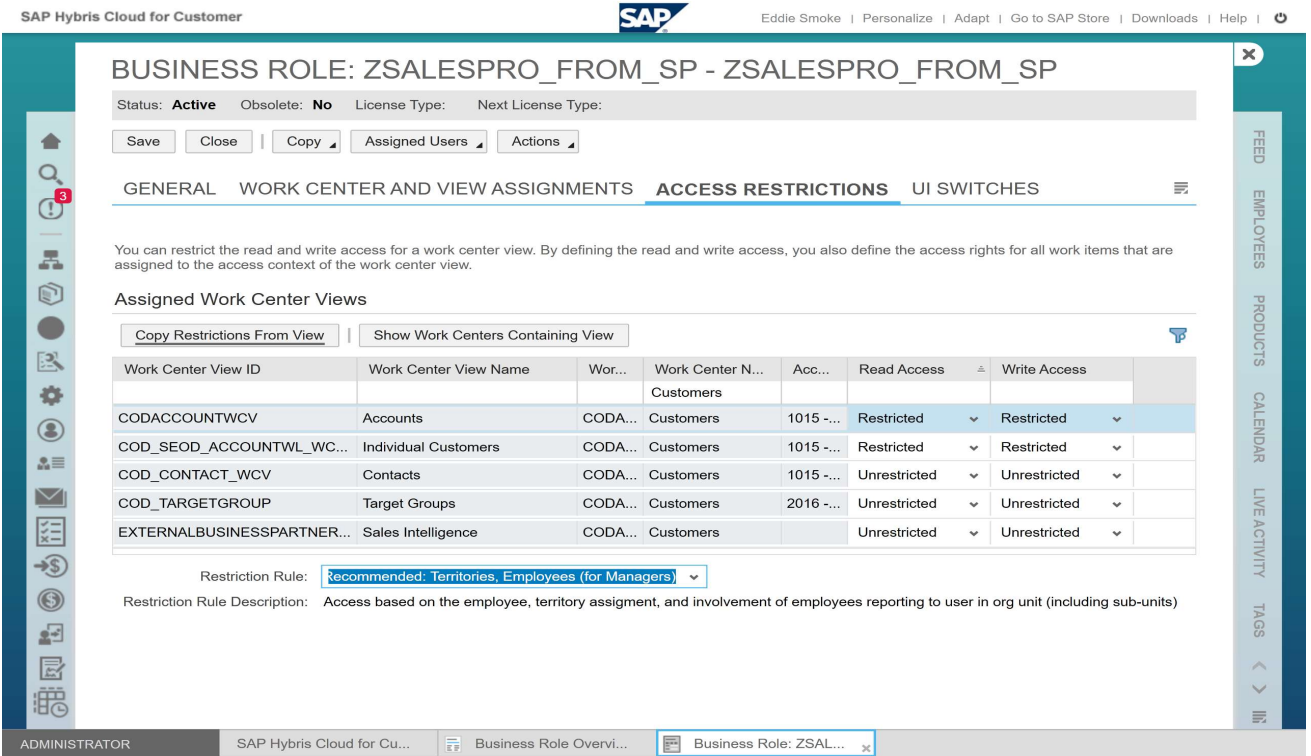


Filtering by Customers, it will list 5 items. Then I will define restrictions for 2 items:

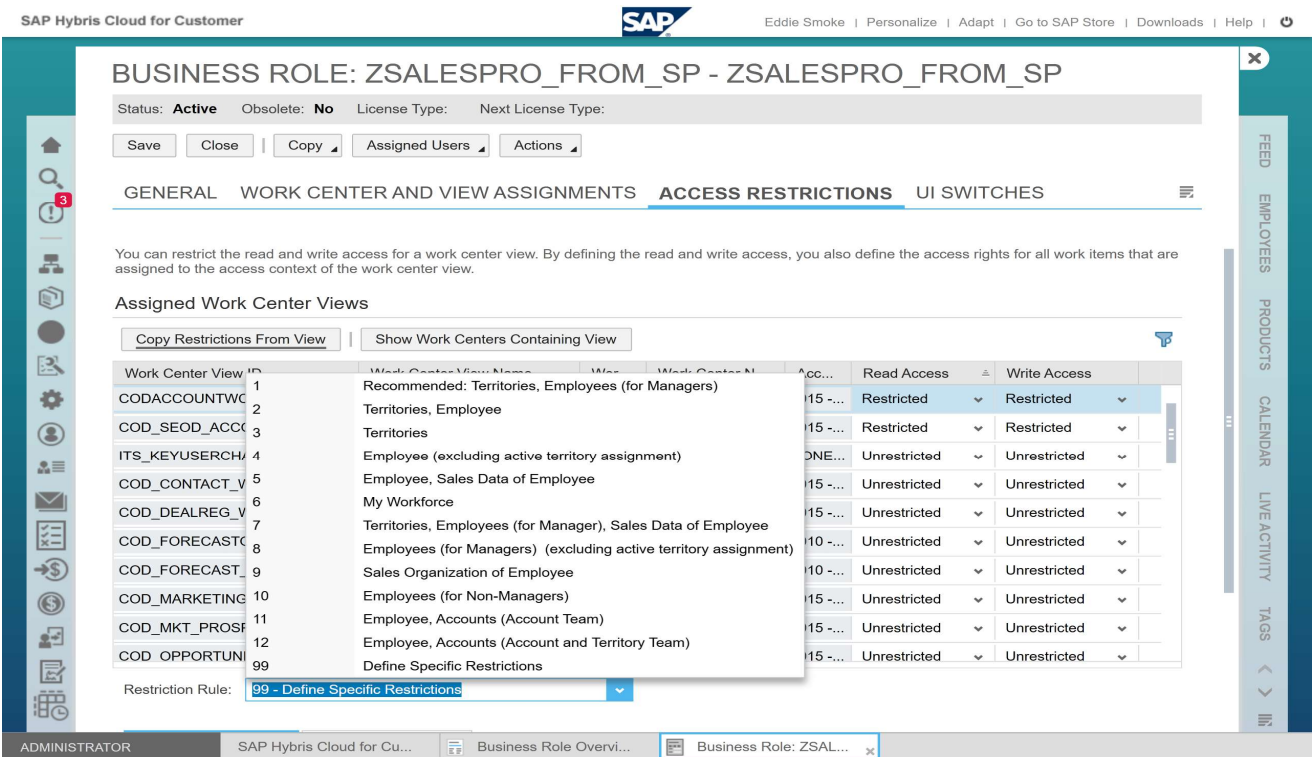
- Accounts
- Individual Customers

Important: Remember, the access restriction MUST be defined for every object, that you want to do it.

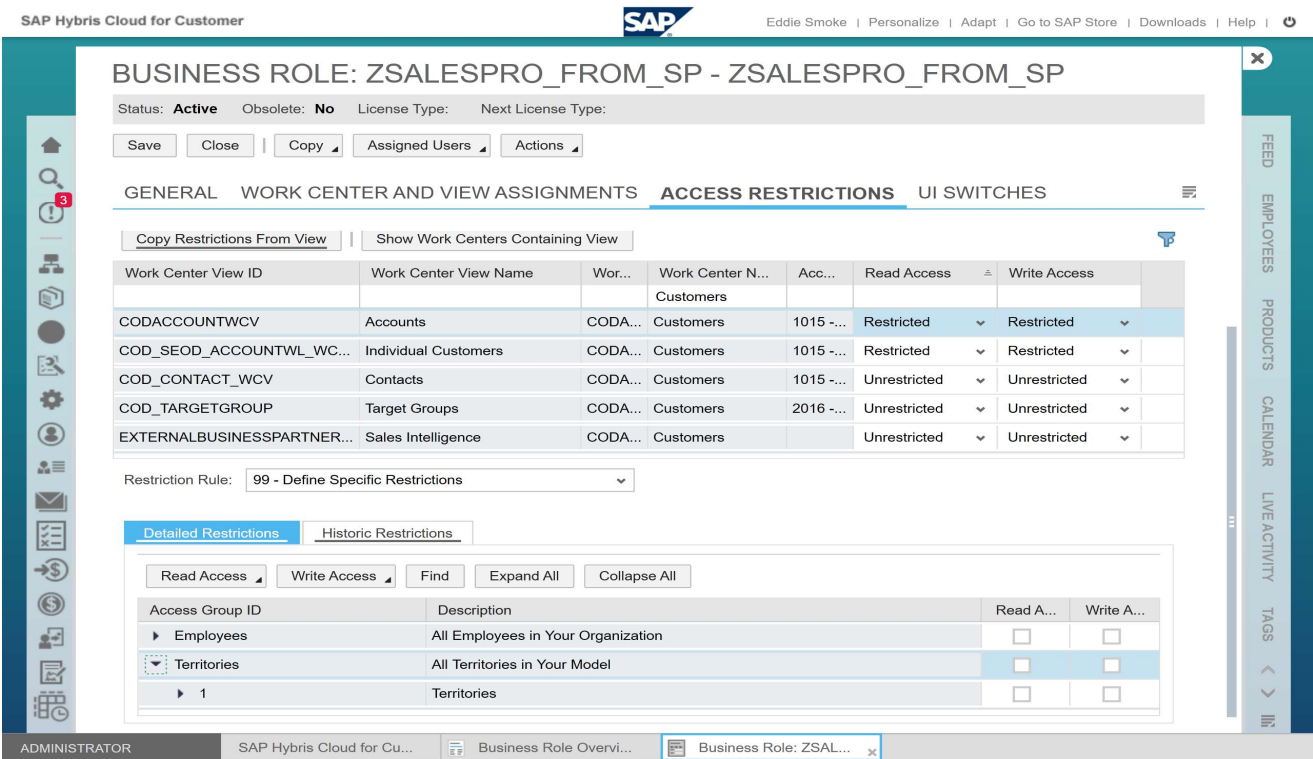
Let’s start with the object “Accounts”. Select the item, and define the Restriction Rule.



There many rules to data restriction, and you must identify the better rule fits your process. In our example, I will select 99 – Define Specific Restriction.



After define the Restriction Rule, the territories mentioned before are listed below.



That Business Role, belongs to Brazil – Sao Paulo, and then I will set Sao Paulo Territory, Read and Write access.

Then finished.

BUSINESS ROLE: ZSALESPRO_FROM_SP - ZSALESPRO_FROM_SP

Status: **Active** Obsolete: **No** License Type: Next License Type:

Save Close Copy Assigned Users Actions

GENERAL WORK CENTER AND VIEW ASSIGNMENTS **ACCESS RESTRICTIONS** UI SWITCHES

EXTERNALBUSINESSPARTNER... Sales Intelligence CODA... Customers Unrestricted Unrestricted

Restriction Rule: 99 - Define Specific Restrictions

Detailed Restrictions Historic Restrictions

Read Access Write Access Find Expand All Collapse All

Access Group ID	Description	Read A...	Write A...
63	Brazil	<input type="checkbox"/>	<input type="checkbox"/>
219	Santa Catarina	<input type="checkbox"/>	<input type="checkbox"/>
64	Brasília	<input type="checkbox"/>	<input type="checkbox"/>
65	Minas Gerais	<input type="checkbox"/>	<input type="checkbox"/>
66	Parana	<input type="checkbox"/>	<input type="checkbox"/>
67	Rio de Janeiro	<input type="checkbox"/>	<input type="checkbox"/>
68	Rio Grande do Sul	<input type="checkbox"/>	<input type="checkbox"/>
69	Rio Grande do Norte	<input type="checkbox"/>	<input type="checkbox"/>
70	Sao Paulo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
71	Netherlands	<input type="checkbox"/>	<input type="checkbox"/>

ADMINISTRATOR SAP Hybris Cloud for Cu... Business Role Overvi... Business Role: ZSAL...

Now, I will do the same for Individual Customers.

BUSINESS ROLE: ZSALESPRO_FROM_SP - ZSALESPRO_FROM_SP

Status: **Active** Obsolete: **No** License Type: Next License Type:

Save Close Copy Assigned Users Actions

GENERAL WORK CENTER AND VIEW ASSIGNMENTS **ACCESS RESTRICTIONS** UI SWITCHES

You can restrict the read and write access for a work center view. By defining the read and write access, you also define the access rights for all work items that are assigned to the access context of the work center view.

Assigned Work Center Views

Copy Restrictions From View Show Work Centers Containing View

Work Center View ID	Work Center View Name	Wor...	Work Center N...	Acc...	Read Access	Write Access
CODACCOUNTWCV	Accounts	CODA...	Customers	1015 -...	Restricted	Restricted
COD_SEOD_ACCOUNTWL_WC...	Individual Customers	CODA...	Customers	1015 -...	Restricted	Restricted
COD_CONTACT_WCV	Contacts	CODA...	Customers	1015 -...	Unrestricted	Unrestricted
COD_TARGETGROUP	Target Groups	CODA...	Customers	2016 -...	Unrestricted	Unrestricted
EXTERNALBUSINESSPARTNER...	Sales Intelligence	CODA...	Customers		Unrestricted	Unrestricted

Restriction Rule: 99 - Define Specific Restrictions

Detailed Restrictions Historic Restrictions

Read Access Write Access Find Expand All Collapse All

2 Messages

✓ Your entries have been saved.

ADMINISTRATOR SAP Hybris Cloud for Cu... Business Role Overvi... Business Role: ZSAL...

Now, I will do the same process to ZSALESPRO_FROM_US. But now selecting the US Central.

BUSINESS ROLE: ZSALESPRO_FROM_US - ZSALESPRO_FROM_US

Status: **Active** Obsolete: **No** License Type: Next License Type:

Save Close Copy Assigned Users Actions

GENERAL WORK CENTER AND VIEW ASSIGNMENTS **ACCESS RESTRICTIONS** UI SWITCHES

EXTERNALBUSINESSPARTNER... Sales Intelligence CODA... Customers Unrestricted Unrestricted

Restriction Rule: 99 - Define Specific Restrictions

Detailed Restrictions Historic Restrictions

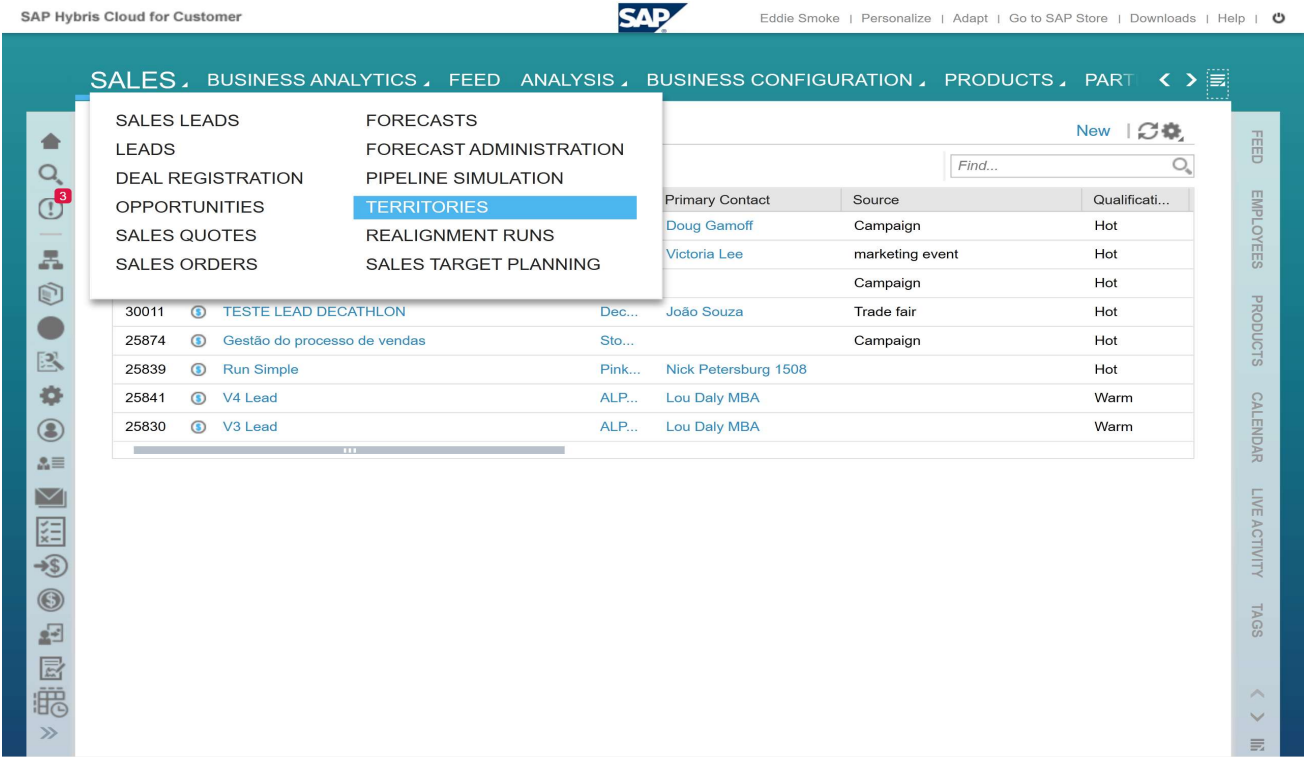
Read Access Write Access Find Expand All Collapse All

Access Group ID	Description	Read A...	Write A...
2	United States	<input type="checkbox"/>	<input type="checkbox"/>
109	Indirect Sales - US	<input type="checkbox"/>	<input type="checkbox"/>
115	Petroliance	<input type="checkbox"/>	<input type="checkbox"/>
116	Haron	<input type="checkbox"/>	<input type="checkbox"/>
3	US Central	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	US NorthEast	<input type="checkbox"/>	<input type="checkbox"/>
5	US South	<input type="checkbox"/>	<input type="checkbox"/>
6	US South East	<input type="checkbox"/>	<input type="checkbox"/>
7	US West	<input type="checkbox"/>	<input type="checkbox"/>
204	Sonv -IND	<input type="checkbox"/>	<input type="checkbox"/>

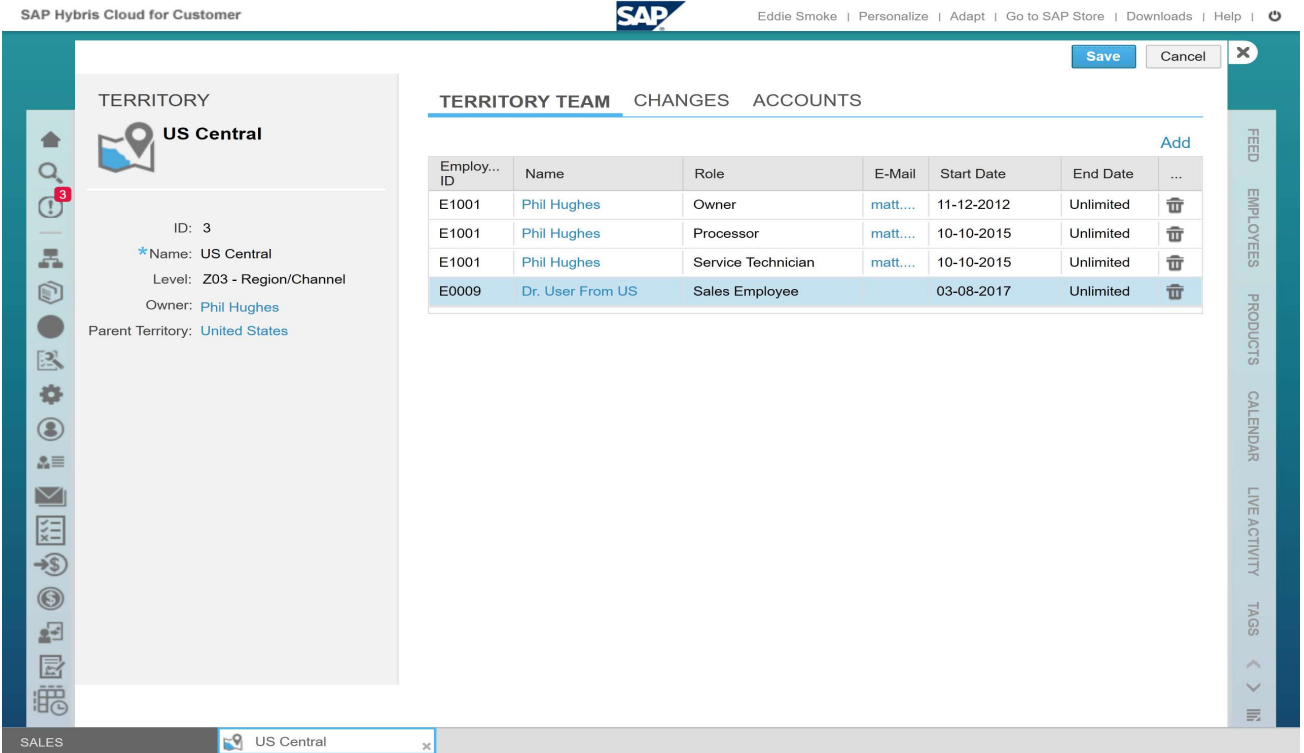
ADMINISTRATOR SAP Hybris Cloud for Cu... Business Role Overvi... Business Role: ZSAL...

1.4. Setting Users as Sales Employee from Territories

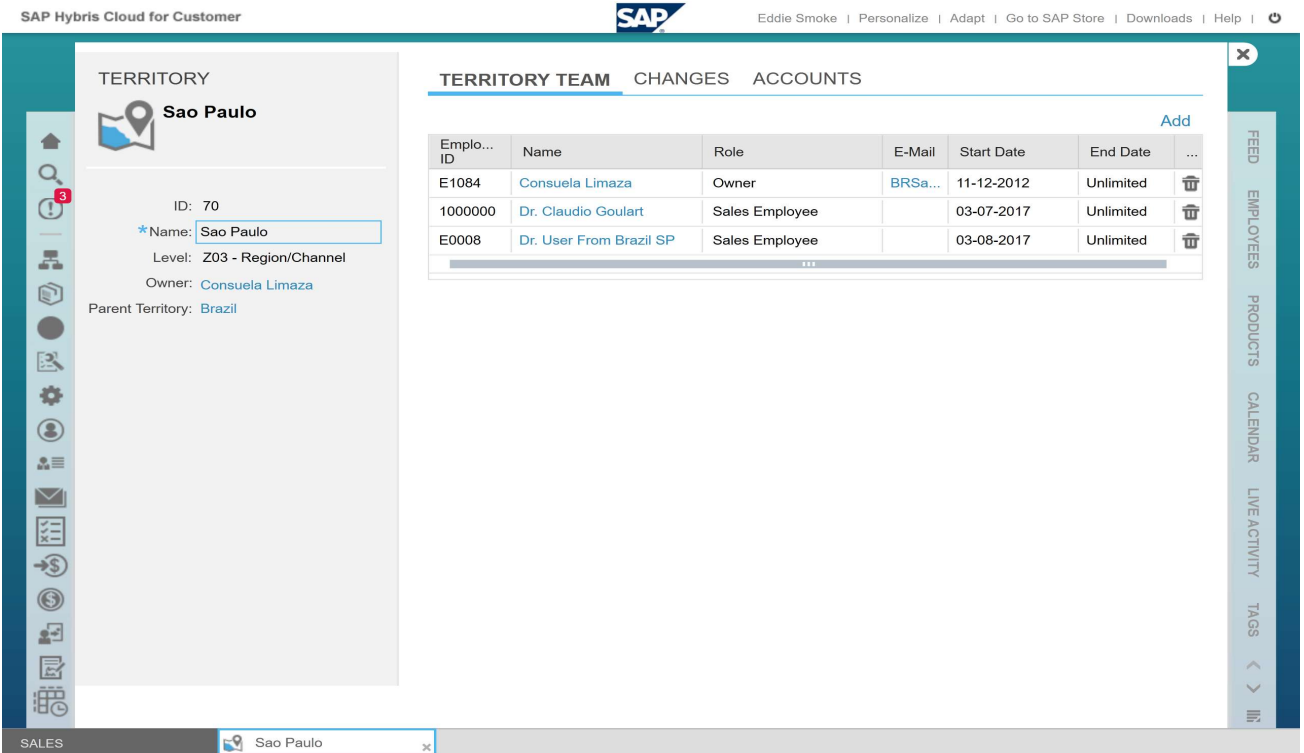
On Sales -> Territories, Let's set the users created before as Sales Employee.



On US Central Territory, Territory Team, Add the User from US

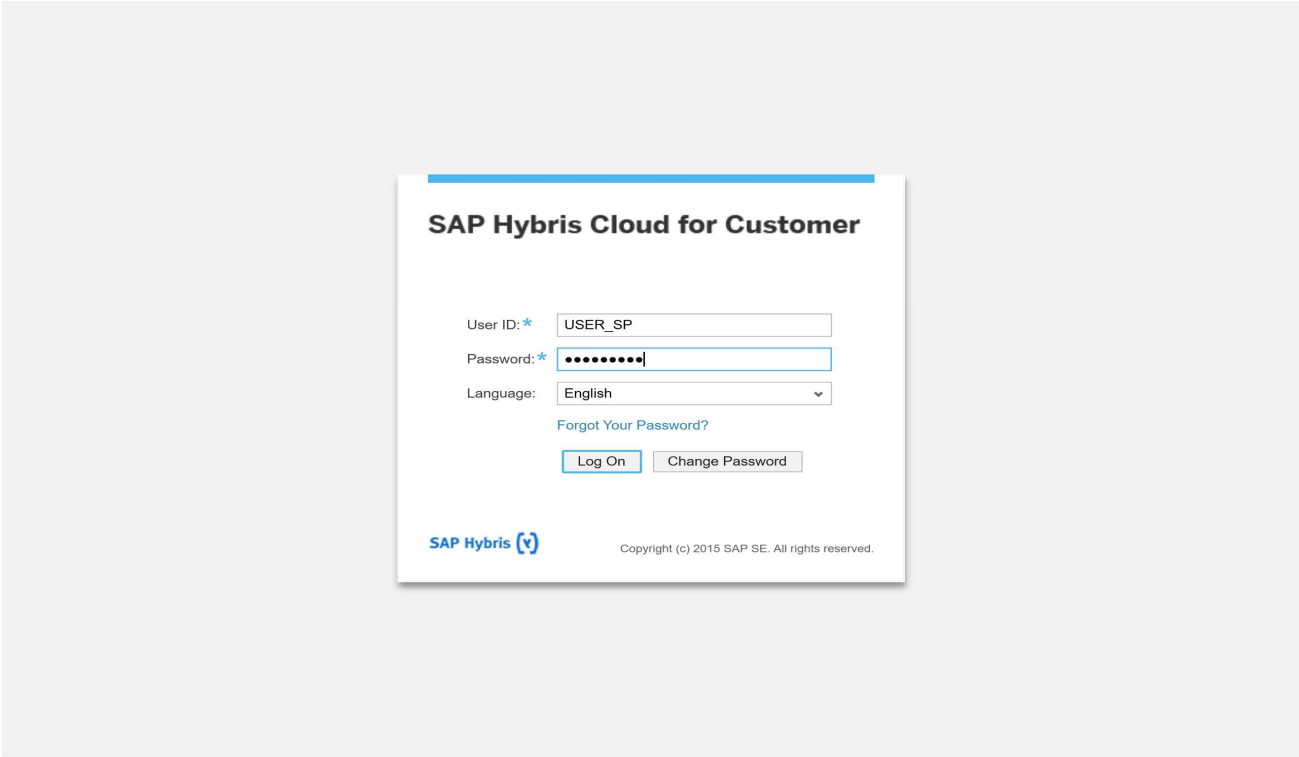


Do the same with Sao Paulo Territory, adding User from Brazil SP.

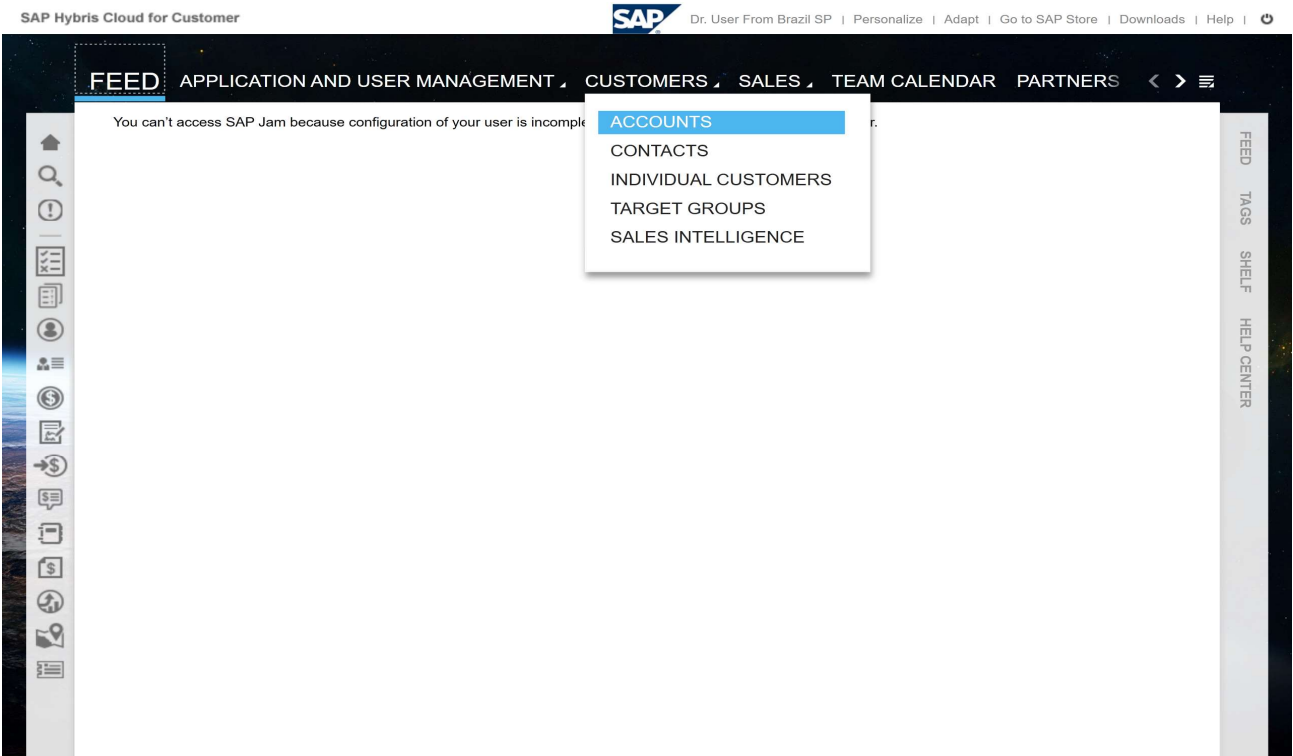


1.5. Testing Data Restriction

Login USER_SP.

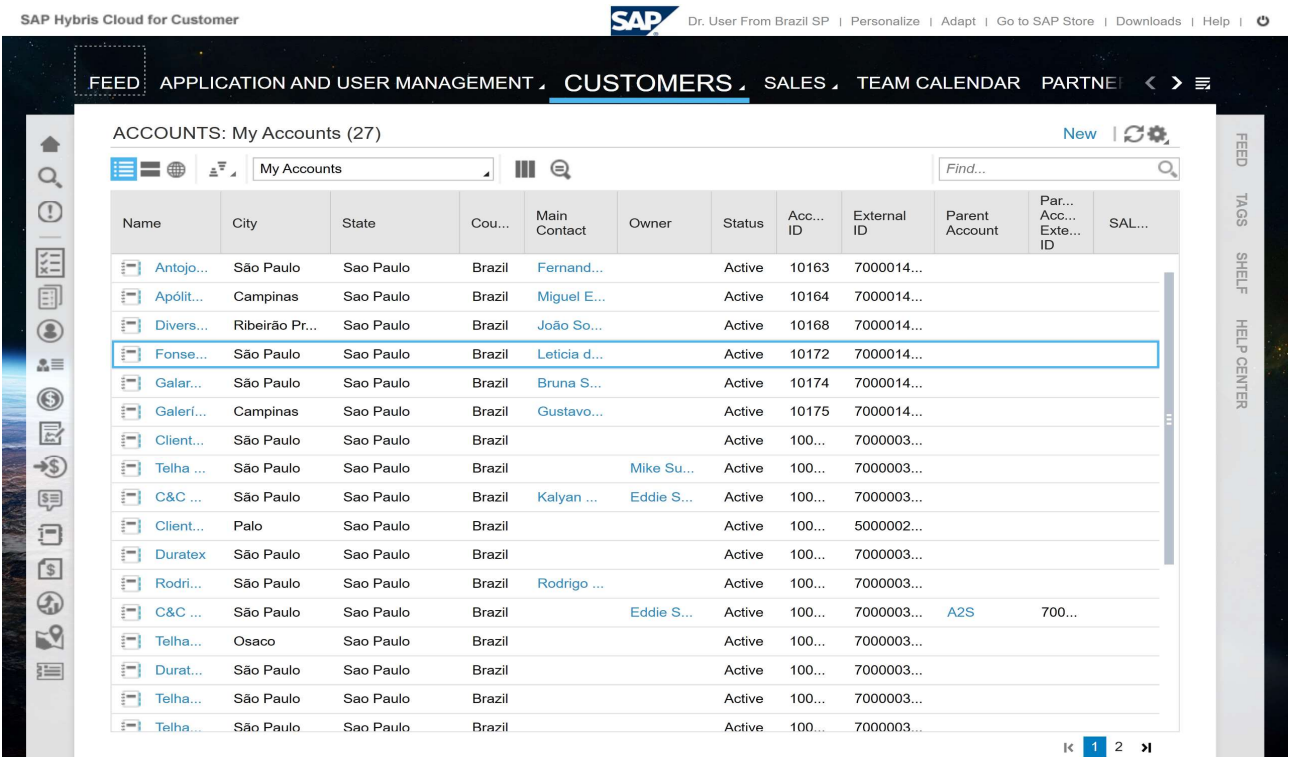


Let's access CUSTOMER – Accounts records

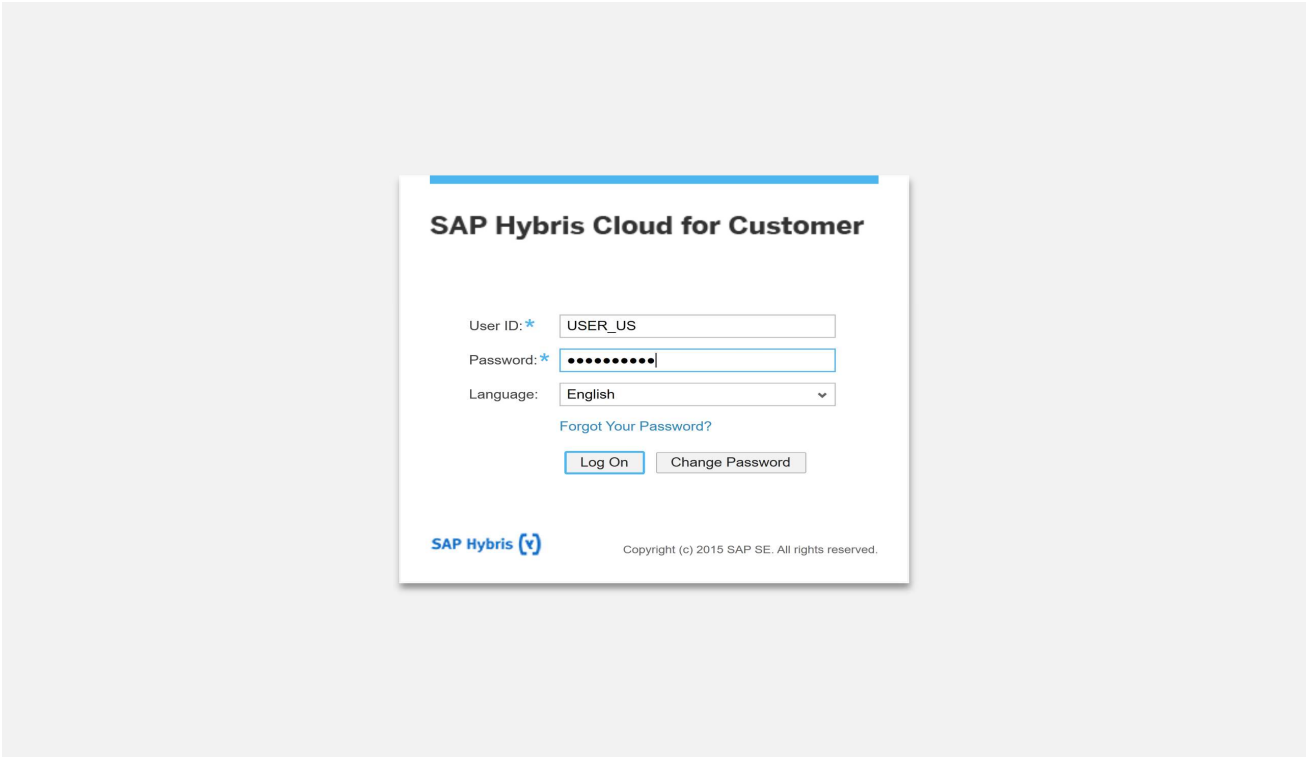


Notice that only records from Sao Paulo are listed. The same happen with Individual Customers.

Important: IF THE CUSTOMER OU INDIVIDUAL CUSTOMER ARE HAVE NOT ANY TERRITORY SET, THEN THE RECORD WILL BE LISTED FOR EVERY SALES REP.



Doing the same with USER_US



Only records from United States are listed.

SAP Hybris Cloud for Customer

Dr. User From US | Personalize | Adapt | Go to SAP Store | Downloads | Help

FEED APPLICATION AND USER MANAGEMENT CUSTOMERS SALES TEAM CALENDAR PARTNER

ACCOUNTS: My Accounts (311)

My Accounts Find...

Name	City	State	Country	Main Contact	Owner	Status	Acc... ID	External ID	Parent Account	Par... Acc... Ext... ID	SAL...
Impac...	Santa Clara	Cali...	United States	Achim P...		Active	1008	7000002...			
Succe...	San Mateo	Cali...	United States	Rachael...		Active	10011	865283			
Lube ...	Columbus	Ohio	United States	Timothy ...		Active	10015	7000010...			
Word...	Columbus	Ohio	United States	Clarenc...		Active	10020	865527			
Divan...	Sunnyvale	Cali...	United States			Active	10314	865506			
Bright...	Sunnyvale	Cali...	United States	Jack Bla...		Active	10329	865515			
HP	Palo Alto	Cali...	United States	Catherin...	Phil Hug...	Active	10332	865463			
Rock...	New York	New...	United States	Sean Fly...		Active	10334	865290			
Intel C...	Santa Clara	Cali...	United States	David Perl		Active	10335	865469			
BG To...	San Franci...	Cali...	United States	Mary Ma...		Active	100...	7000009...			
Best ...	Palo Alto	Cali...	United States	Jim Pars...	Diane W...	Active	100...	7000002...			
Best ...	Auburn	Cali...	United States	Essie Vaill	Diane W...	Active	20000	7000002...	Best Buy	700...	
Best ...	Bakersfield	Cali...	United States	Cruz Ro...	Diane W...	Active	20001	7000002...	Best Buy	700...	
Best ...	Burbank	Cali...	United States	Rosema...	Mike Su...	Active	20004	7000002...	Best Buy	700...	
Best ...	Corona	Cali...	United States	Bernard ...	Diane W...	Active	20005	7000002...	Best Buy	700...	
Best ...	Dublin	Cali...	United States	Sue Haa...	Mike Su...	Active	20006	7000002...	Best Buy	700...	
Best ...	Fresno	Cali...	United States	Lashaw...	Mike Su...	Active	20008	7000002...	Best Buy	700...	

1 2 3 4 5

That's it folks, really simple and you can do the same for many objects. Bye!!