

Article - Blog Módulo CRM Web Site

Customization Guide - SAP C/4hana

Version

This article was created by SAP C4hana – C4C (2002) Version

Brief Description

Until the ends of 2019, it was not possible to assign to the same customer the role Customer and Competitor. It was a big problem because a Customer could be a Competitor in different business areas. To solve this kind of problem it would be necessary to create 2 records (Customer and Competitor).

This document has the objective to explain how to assign 2 roles (Customer and Competitor) into the same Business Partner in SAP C4C.

Honestly, it's very easy to do it right now, however, it was a huge problem to explain to the Customer that weakness in a workshop meeting.

I hope you enjoy!!

Author

Cláudio Goulart has been working since 1992 with the implementation of corporate solutions. Since 1999, he began his career with CRM deployments, with the most widely used Market Suites such as Vantive, PeopleSoft and Siebel. And since 2006, it has been active with SAP CRM on Premise (Interaction Center, Services, Sales, Marketing and Middleware with ECC)

Specialist in evaluation, process definition, and adherence of customer needs to SAP S4hana on Premise and Cloud solutions C4Hana.

Extensive knowledge in implementations of SAP S4hana and C4hana solutions in the areas of Call Center, Services, Marketing and Sales.

Experienced integrator of SAP on Premise Solutions (S4Hana CRM) and SAP C4Hana (Sales, Services, Marketing and Qualtrics), using SAP Cloud Platform to integrate S4hana process.

Contact Data

Email: cjsgoulart@gmail.com

Blog: www.modulocrm.com.br

LinkedIn: <https://www.linkedin.com/in/cgoulart/>

Article - Blog Módulo CRM Web Site

Content

- 1. Customization 3
 - 1.1. Overview 3
 - 1.2. Create a Customer 3
 - 1.3. Create a Competitor..... 4
 - 1.4. Demonstrating..... 5

Article - Blog Módulo CRM Web Site

1. Customization

1.1. Overview

The objective of this document is explained how to assign 2 roles (Customer and Competitor) into the same Business Partner. It could be logical this kind of thing. Because the same Customer could be your Competitor in different areas. That functionality can be use with Customer, Competitor and Contact. Although the functionality is easy, it is a big problem to try to explain into a workshop meeting. Honestly it was embarrassing.

1.2. Create a Customer

Now, I will create a Customer record into the SAP C4C.

A screenshot of the SAP Sales Cloud 'New Account' form. The left sidebar shows the navigation menu with 'Accounts' selected. The main form area contains fields for 'Name' (ModuloCRM), 'Prospect' (No), 'Role' (Customer), 'Parent Account', 'Web Site' (www.modulocrm.com.br), 'ABC Classification', 'Country' (PE - Peru), 'City', and 'State'. At the bottom right, there are 'Save', a dropdown arrow, and 'Cancel' buttons.

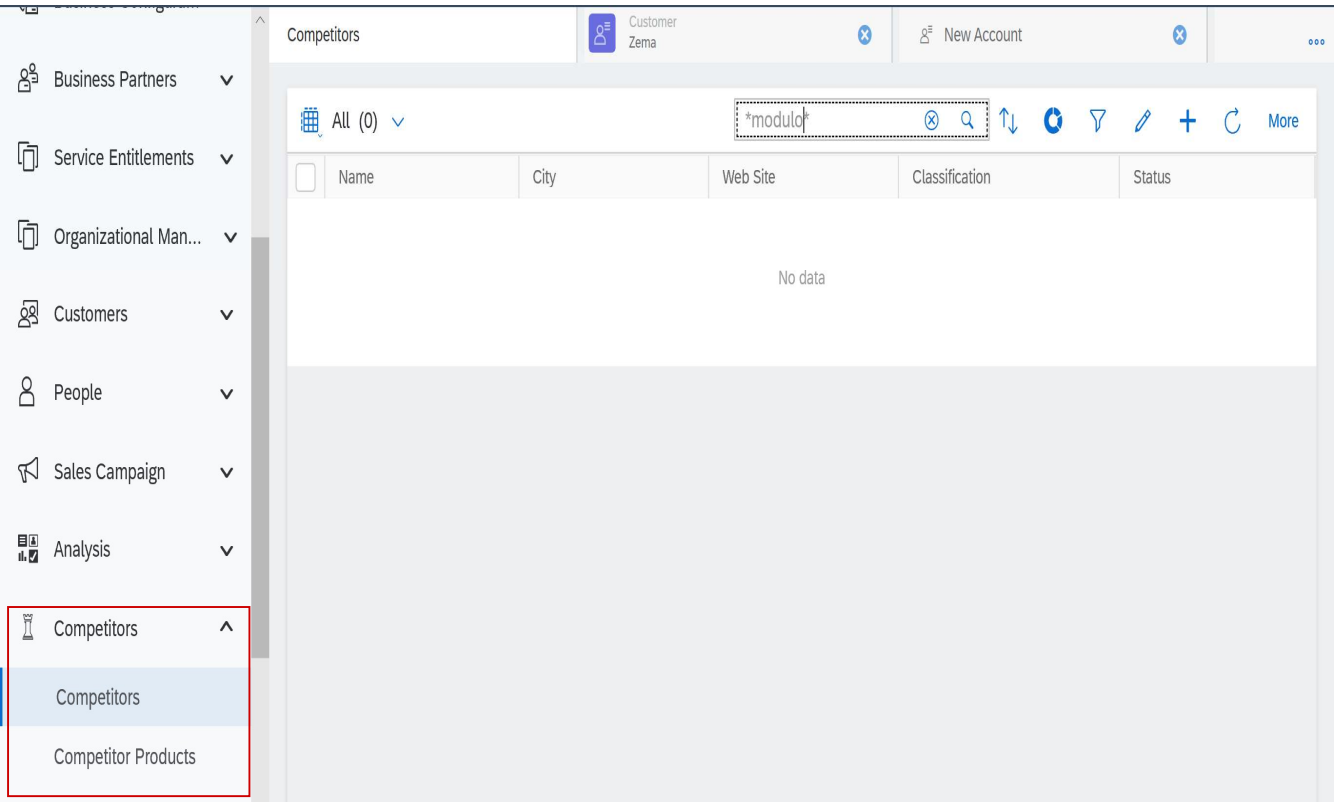
Save the record

A close-up of the save options dropdown menu. It shows three options: 'Save', 'Save and New', and 'Save and Open'. Below the dropdown, the 'Save and Open' button is highlighted, followed by a dropdown arrow and a 'Cancel' button.

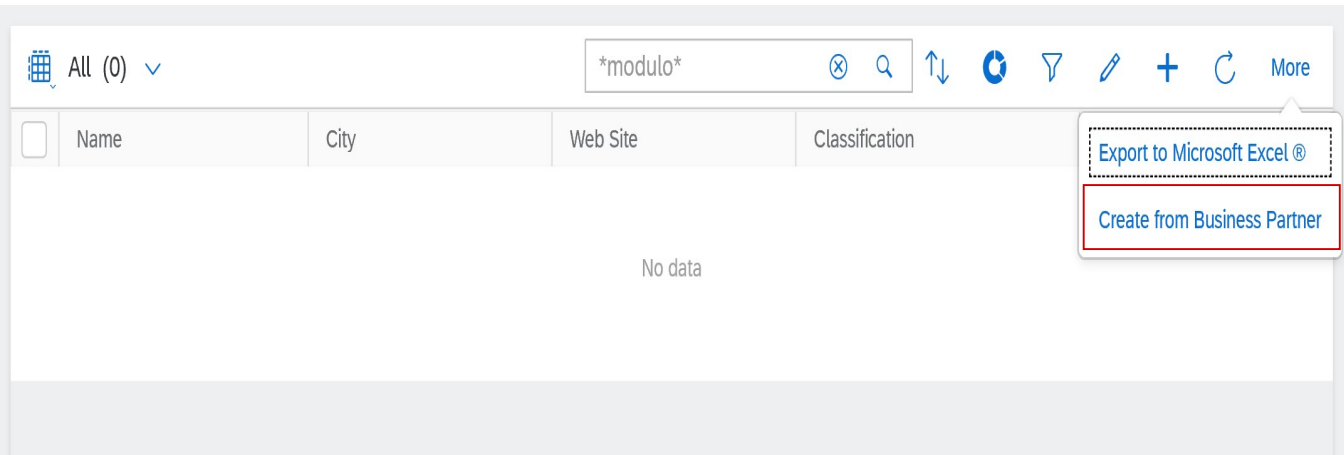
Article - Blog Módulo CRM Web Site

1.3. Create a Competitor

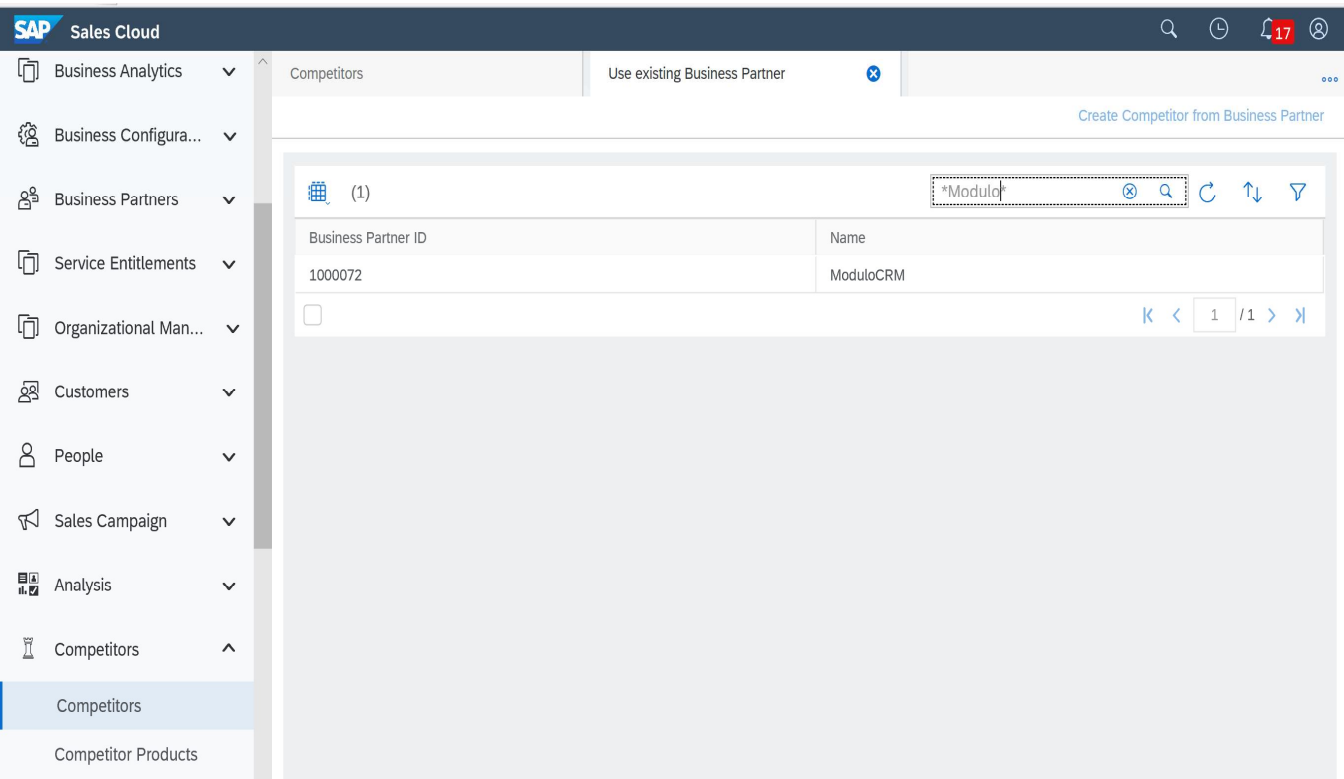
On link “Competitors”, I will create a Competitor record into the System.



I already know that Customer doesn't exist. So, click into the link “Create from Business Partner”



A screen appears, listing all Business Partners created so far. Then, I choose the Business Partner “1000072 – CUSTOMER” as demonstrated below.



Article - Blog Módulo CRM Web Site

[Customization Guide - SAP C/4hana](#)

Once clicked the Business Partner, the link “Create Competitor from Business Partner” will be enabled. Now, click on it, then the Competitor screen appears, allowing you start the Competitor register.

Competitors

Use existing Business Partner

...

Create Competitor from Business Partner

(1)

Modulo

⊗ 🔍 ↻ ↕ ⚙

Business Partner ID	Name
1000072	ModuloCRM

✓ 1 Selected

⏪ < 1 /1 > ⏩

Some data from Customer and Competitor are shared, however, most of them are different. Then, you have to full fill all fields manually. Save the record and is done.

Competitors

Competitor ModuloCRM

...

ModuloCRM

★ 🚩 📶 | 💬 🏠 +

Actions ⌵

Status
Active

Classification
⌵

*Name
ModuloCRM

Additional Name
⊗

Address
Peru

Country
Peru
Address Line 1
Address Line 2
House Number
Street
Address Line 4
Address Line 5
City
State
Postal Code

Phone
⊗

Overview

Charts

Feed

Relationships

Products

Opportunities

Attachments

Sales

Notes

Changes

Opportunities (0)

⌵ 🔍 More

Name	Account	Sales Phase	Owner	Status	Progress
No data					

1.4. Demonstrating

Now, I am going to show you the magic.

List the Account with the Account ID 1000072

Accounts

All (1) ⌵

ModuloCRM

⊗ 🔍 ↻ 🔄 ⚙ ✎ + ...

	Account ID	Name	City	State	Country	Main Contact	Owner	Territory	Status
<input type="checkbox"/>	1000072	ModuloCRM			Peru				Active

List the Competitor with the Account ID 1000072. The same ID!!

Competitors

All (1) ⌵

modulocrm

⊗ 🔍 ↻ 🔄 ⚙ ✎ + ↻ ...

	Competitor ID	Name	City	Web Site	Classification	Status
<input type="checkbox"/>	1000072	ModuloCRM		www.modulocrm.com.br		Active

It seems simple and it is. But only in 1911 version that would be possible. I hope you enjoy!!