

# SAP Best Practices for CRM

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BUSINESS SOLUTION**



## Positioning and Concept of Use

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# 1 Document Objectives

The following paper will attempt to position SAP Best Practices for CRM and answer several key questions regarding the use of SAP BEST PRACTICES.

The paper is targeted at the same groups as SAP BEST PRACTICES themselves; Presales, Sales, Consulting, Marketing, and Product Management. It also provides a useful overview of SAP BEST PRACTICES for consultants and project leads who are interested in SAP BEST PRACTICES and are considering using them in their projects.

In the first part, questions as to the target groups, areas of use, and project types for using SAP BEST PRACTICES will be dealt with.

In the second part, several central points concerning the use of SAP BEST PRACTICES in concrete projects will be examined, including delivery scope, how to order, release statuses, add-ons, project duration, resources, and embedding in the development landscape.

The third part deals with the scenario scope and issues such as standalone scenarios, demo systems, and localization.

## 2 Positioning of SAP BEST PRACTICES

### 2.1 Target Groups

SAP Best Practices for CRM do not just focus exclusively on one target group but can be used in many different ways. SAP Best Practices for CRM are therefore not just a monolithic block that can either be used as a whole or not at all, but represents an extensive package from which you can select specific elements and use them according to your requirements and area of use.

In the areas **Presales** and **Sales**, SAP BEST PRACTICES can be used to draft concrete mySAP CRM solutions at an early stage and to clear up technical requirements. The quick and efficient implementation of SAP Best Practices for CRM can also be positioned alongside the quality of the mySAP CRM solution. The logical implementation procedure can be directly demonstrated. This provides an excellent opportunity to distinguish SAP from its competitors, as well as develop positive results on Return on Investment.

In **Consulting**, SAP BEST PRACTICES offer extensive business management documents on individual business scenarios which provide a solid foundation and basis for discussion of the mySAP CRM solution required by customers. With the help of the installation guide and automated activities, SAP BEST PRACTICES business scenarios can be implemented quickly and easily. The quick creation of a prototype supports project team training, end-user training, and the creation of the business blueprint.

In the areas of **Marketing** and **Product Management**, SAP Best Practices for CRM can be used as an added-value product to position SAP as a Solution Provider:

mySAP CRM solutions do not focus on stringing together functionality but are oriented towards relevant business scenarios and are delivered with preconfiguration and both technical and business management documentation. SAP BEST PRACTICES scenarios are fully integrated and can, from a technical point-of-view, span different systems (for example, SAP R/3 Backend, SAP CRM, and SAP BW) and can cover general business processes (living integration).

**SAP's international subsidiaries** often use SAP BEST PRACTICES to quickly create their own internal systems for presentations, demos, or employee training.

## 2.2 Areas of Use and Benefits

SAP Best Practices for CRM can be used in different phases of a mySAP CRM project:

In the **Evaluation** phase, SAP BEST PRACTICES help to quickly set up a prototype that can be used to get a “look and feel” impression of a mySAP CRM solution.

During the **Implementation** phase, SAP BEST PRACTICES contain all the steps necessary for the implementation of selected business scenarios. This includes user roles, automated configuration activities, as well as predefined test catalogs to help reduce the time needed for implementation.

The mySAP CRM solution based on SAP Best Practices for CRM can be used at an early stage during the implementation project for **demo** and **training purposes** for both the project team and future end users. In addition, SAP BEST PRACTICES deliver numerous end-user procedures that can be used as training material for end-user training and as a basis for end-user documentation.

You can achieve the following fundamental benefits by using SAP BEST PRACTICES:

- Reduced implementation time
- Reduced costs
- Reduced project risks
- Increased quality

## 2.3 Application Model

### 2.3.1 Project Types

Ideally, two different types of projects can be distinguished, depending mainly on the scope of the project and the demands of the customer:

- A project matching SAP BEST PRACTICES scope (standard project)
- A project *not* matching SAP BEST PRACTICES scope

- **Project matching SAP BEST PRACTICES scope (standard project)**

This is a project where the SAP BEST PRACTICES scenarios cover some of the customer's demands. There are two possibilities of using the SAP BEST PRACTICES approach:

- If the customer wants to check the usability and feasibility of a solution before starting the real implementation project, he can easily build a prototyping environment that can be reused for further implementation activities. To ensure the efficiency and effectiveness of the prototyping project, it is recommended that you use SAP BEST PRACTICES for the installation of the prototype solution. The prototype can then be used for blueprinting and project team training. Depending on the project approach, selected configuration settings can then be transferred into the development system from the prototype a) automatically (via BC Sets), or b) manually.
- If the customer does not want to use a prototyping approach, SAP BEST PRACTICES can be applied directly to the development system.  
In this case, it can serve as baseline configuration that can be extended with further configuration settings according to the customer's needs.

- **Project not matching SAP BEST PRACTICES scope**

This is a project where the customer's scope does not match the scope of SAP BEST PRACTICES at all, for example, hand-held scenarios and CRM Mobile Sales. In this case, it is recommended to use the *Implementation Roadmap* as well as the *Solution Management Roadmap* as a guideline. Nevertheless, it is possible to make use of SAP BEST PRACTICES deliverables as accelerators at least for certain project activities. For example, in the Business Blueprint Phase, SAP BEST PRACTICES documents can be used as checklists in order to double-check implementation activities.

### 2.3.2 Contrast to IDES

SAP BEST PRACTICES are intended to act as a supplement to the IDES portfolio. Differences arise as a result of different focuses.

**IDES** aims to map as much functionality of mySAP CRM on evaluation and demonstration as possible as well as present application highlights and make these available in a global infrastructure. It is not possible to directly transfer the configuration contained in IDES for an implementation.

**SAP Best Practices for CRM**, on the other hand, contain a limited number of *central scenarios* for mySAP CRM that can also be used for evaluation and demonstration purposes. The main focus of SAP BEST PRACTICES is, however, to make all configuration settings for these business scenarios readily available for implementation. All pre-settings delivered with SAP BEST PRACTICES are fully documented and are often reusable. SAP BEST PRACTICES therefore facilitate end-to-end project processing from solution evaluation (prototype creation) through to implementation.

No IDES data is delivered with SAP Best Practices for CRM. Master data that is necessary for the running of scenarios is created within the scope of SAP BEST PRACTICES installation by:

- a) Replicating from the connected SAP R/3 customer system
- b) Automating procedures to create master data (CATT)
- c) Manual data entry

### 2.3.3 Contrast to “Integrated Business Scenarios”

The “Integrated Business Scenarios” offer scenario-based access to generic technical descriptions and Collaborative Business Maps. With SAP CRM 4.0, SAP delivers more than 90 pre-packaged business scenarios with 130 variants, including 280 executable business processes used in 750 instances, and comprehensive configuration support (standard configuration guides). The documentation on the Integrated Business Scenarios is delivered through the SAP Solution Manager (for more information see <http://service.sap.com/solutionmanagement>).

SAP Best Practices for CRM concentrate on the “**most demanded**” standard scenarios and delivers **additional** documentation and preconfiguration for the evaluation & implementation of these scenarios. This means that an equivalent SAP BEST PRACTICES scenario does not exist for every single Integrated Business Scenario, but for those where an SAP BEST PRACTICES already exists, additional value is added to the solution. There are several differences between the SAP BEST PRACTICES Installation and Configuration Guides and the Integrated Business Scenarios standard configuration guides.

#### **SAP BEST PRACTICES Guides:**

- Are **more concrete** than the standard configuration guides (proposing examples, naming conventions, etc.)

- Provide **release dependent** installation information to ensure a smooth implementation process
- Can be used with **automated procedures** (BC Sets, CATTs)
- Come with SAP BEST PRACTICES **installation/configuration roles**
- Refer to scenarios that might differ from the standard scenarios (for example, contain **more/less functionality** than in the standard scenario)
- Contain **checks** that support a consistent installation process, for example, checking the completeness of replication
- Provide **delta installation information** that can be used to extend an existing mySAP CRM solution with additional functionality

## 2.4 Outlook

The further development of SAP Best Practices for CRM will take place according to demand. It is likely that generic as well as industry-specific oriented CRM scenarios will be of importance.

In order to ensure the marketability of SAP BEST PRACTICES, proven collaboration with selected SAP partners in the past will continue to play a central role. Due to great demand, the creation of partner solutions based on SAP Best Practices for CRM will be supported.

SAP Best Practices for CRM are suited for companies of all sizes: They can be used by midsize enterprises that need rapid implementation or by larger companies that need to create a corporate template for their subsidiaries.

# 3 Working with SAP BEST PRACTICES

## 3.1 Delivery Scope

The complete package *SAP Best Practices for CRM* consists of two CDs:

- A **Configuration CD** (labeled **Configuration Settings**) that contains the required system add-on. Instructions on add-on installation can be found in the file *Installing Best Practices Add-On (ADDONINS.PDF)*. A general description of add-on installation is contained in the file *SAINT.PDF*. These documents can be found on the Configuration CD in the directory DOCU (in *Adobe Acrobat Reader* Format).
- A **Documentation CD** that contains all scenario documentation (for example, Business Process Procedures, graphical displays, Configuration Guides).

Based on demand, the following ordering options are available:

- For detailed information on SAP Best Practices for CRM, you can order the **Documentation CD** that contains *all documentation* on SAP Best Practices for CRM.
- In order to implement a mySAP CRM solution using SAP Best Practices for CRM, you require the SAP BEST PRACTICES add-on that is available on the preconfiguration CD. In this case, you should order the **complete package** SAP Best Practices for CRM that contains both the documentation CD and the preconfiguration CD.

### 3.2 How to Order

**SAP customers and partners** can order the *complete package* SAP Best Practices for CRM from the contracts department in their local SAP branch office. You can also order the complete package online via the SAP **Software Catalog** on the SAP Service Marketplace (to order a complete package, you need an s-user and a current mySAP CRM licence is a prerequisite). You can also order SAP BEST PRACTICES *documentation CDs* online on the SAP Service Marketplace via the SAP **Knowledge Shop** (to order a documentation CD, you only require an s-user number. A mySAP CRM licence is not a prerequisite). Detailed instructions on how to order can be found on the SAP Best Practices for CRM homepage: <http://service.sap.com/bp-crm>.

**SAP employees** can order SAP Best Practices for CRM *documentation CDs* through their secretary's office or online using the SAP internal "Business-to-Business": <http://intranet.sap.com/b2b>.

If you require the complete SAP BEST PRACTICES package for the implementation of an internal SAP CRM system, it can be ordered through the contracts department (a valid mySAP CRM installation number is required for this).

SAP Best Practices for CRM are available **free of charge** for SAP's customers, partners, and internals.

### 3.3 Add-On Principle

An add-on provides you with the opportunity to expand the functionality of your existing SAP system. By using different mechanisms such as protected namespaces, it can be ensured that no changes are made to the standard-system objects or customer-specific objects when importing transports belonging to an add-on into an SAP system.

SAP Best Practices for CRM contain one add-on for SAP CRM with the following elements:

- Business Configuration Sets.
- Transactions (for starting the Business Configuration Sets)
- Test Catalogs

### 3.4 Releases and Support Packages

The SAP BEST PRACTICES scenarios and implementation guides were developed and tested in a system environment with a defined support package level. This applies to the CRM System and all other SAP components involved (R/3, BW). The next release is valid for the following support packages:

#### CRM

- Release: 4.0 / Support Package 06

#### BW

- Release: 3.5 / Support Package 05

#### ERP

- Release 5.0 / Support Package 04

The use of SAP BEST PRACTICES was only validated for the ERP release mentioned above. Other ERP back-end releases have not been tested and validated, thus functional and integration restrictions must be considered.

#### R/3 Plug In:

- PI 2004\_1\_500: patch level 0004

Errors can occur, particularly in the automated SAP BEST PRACTICES installation, if the release levels in the project system landscape differ from the required levels. This can, for example, be due to the fact that the most recently available support package is at a higher level than the level required and was imported into the system.

In such a case, three alternative courses of action can be taken.

#### Alternative 1:

1. Basis installation of the system landscape on the **exact** level required by the **support package**
2. Installation of *SAP Best Practices for CRM* by using the installation guides
3. Upgrade of the system landscape to the latest available support package level

#### Alternative 2:

1. Basis installation of the system landscape on a different support package level
2. Installation of *SAP Best Practices for CRM* by using the **Installation Guide(s)**. The following additional activities are necessary:
  - a) The list of notes should be manually worked on, taking the new support package into consideration.
  - b) When errors occur in the automated steps, they should be manually worked on based on the corresponding chapter in the Configuration Guide.

**Alternative 3:**

1. Basis installation of the system landscape on a differing support package level
2. Installation of *SAP Best Practices for CRM* **manually** using the **Configuration Guide**. The following additional activities are necessary:
  - a) The notes list must be worked on manually taking the new support package into consideration.

Despite this procedure, errors can still occur outwith the notes and CATT procedures during installation and it might be necessary to carry out deviations and enhancements due to new or changed functionality in the most recent support package.

### 3.5 Combining SAP BEST PRACTICES Scenarios

#### 3.5.1 Building Blocks as Technical Scenario Components

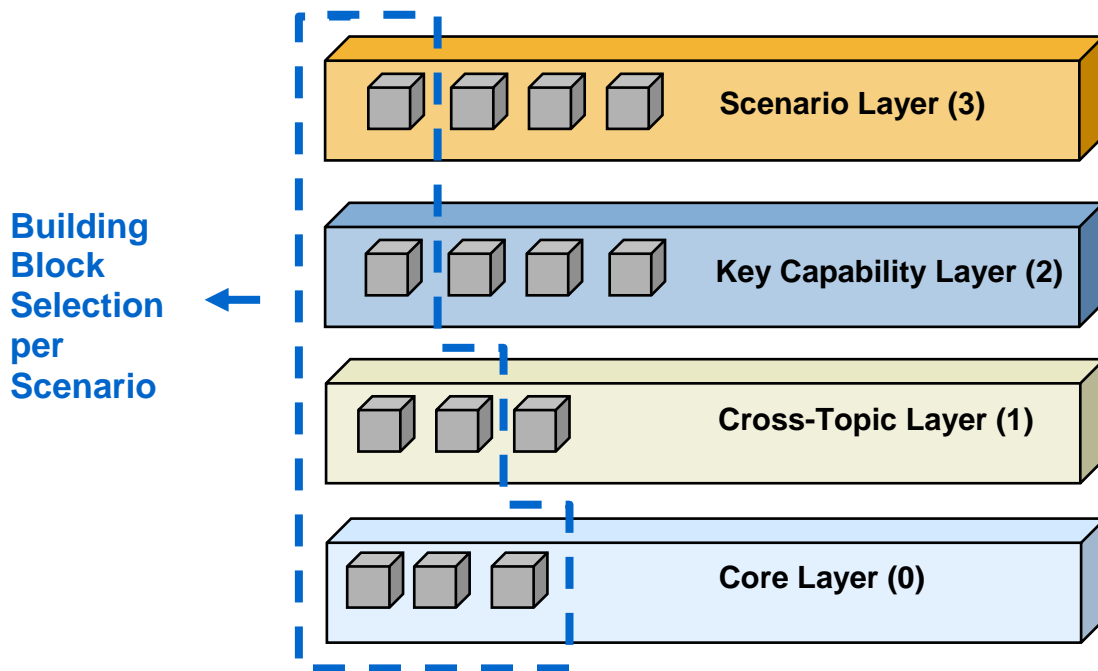
Building blocks are reusable installation units that you can combine to install a business scenario or solution. Compared to preconfiguration packages developed in the past, the building block concept offers some major advantages. The reusability of building blocks accelerates and facilitates your development of specific solutions or components that make up a solution. In addition, development and maintenance costs are minimized, as redundant development is reduced.

The size and content of building blocks can vary from simple technical building blocks to complex building blocks that can be used as stand-alone solution elements. You can thus assemble several basic, technical building blocks to form a higher-level building block, such as a scenario. Or you can use individual Building Blocks to modify an existing scenario or solution.

SAP Best Practices for CRM consist of four different layers. In order to implement a specific CRM scenario building blocks of these layers have to be selected and applied in a pre-defined order.

A scenario installation typically consists of the following steps:

1. Install all building blocks of the core layer.
2. Install the relevant building blocks of the cross-topic layer.
3. Install the building block for the key capability layer to which the scenario belongs.
4. Install the building block for the scenario.



### 3.5.2 Combination Procedure

The SAP BEST PRACTICES scenarios can be configured **in any combination**, **in any order**, and **in any client** in a CRM system.

After importing the add-ons, the objects relevant for the configuration of all scenarios in the different SAP application components are available automatically.

The following should be taken into account during the implementation of the scenarios:

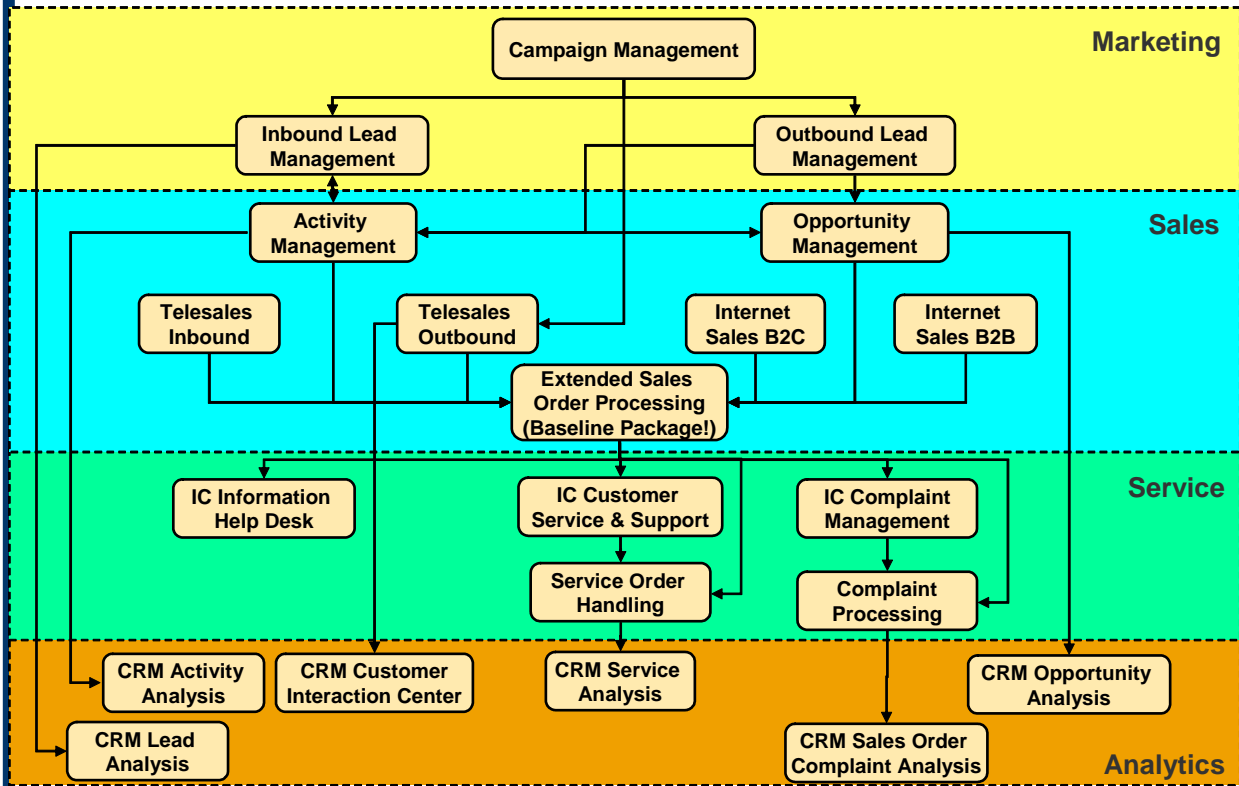
Some installation steps are applicable to the installation process of different scenarios (i.e. some technical building blocks may be part of the installation procedure of different scenarios). Therefore, the respective installation activities only need to be carried out once: When a building block is relevant for scenario A and B and scenario A has already been implemented, then this building block does not need to be set up again for the implementation of scenario B.

### 3.5.3 Setting Up Closed Loop Scenarios

SAP Best Practices scenarios can be used isolated from each other to guarantee a maximum of flexibility.

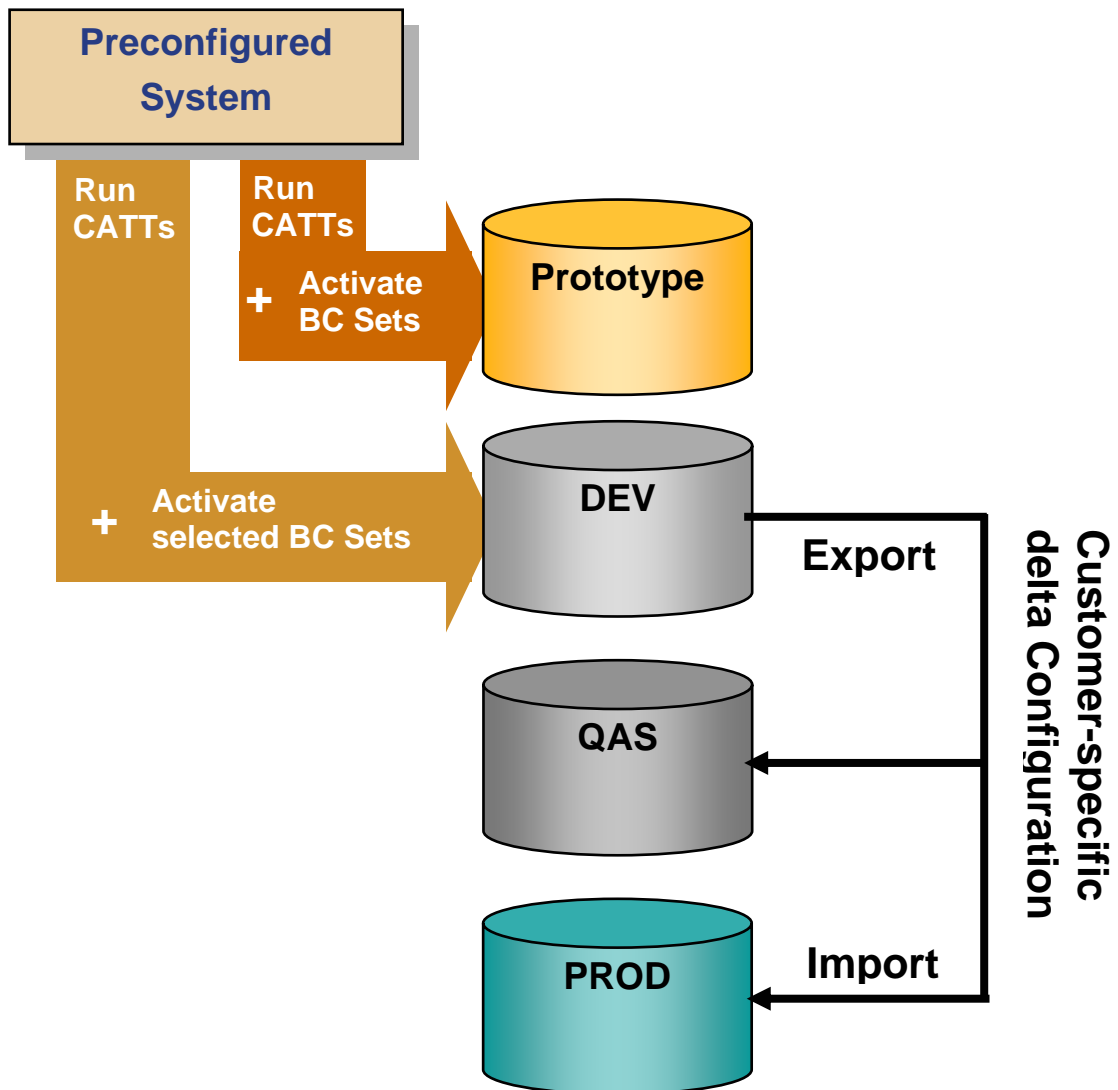
In order to set up more complex business processes the SAP Best Practices scenarios can be combined via predefined interfaces.

The following diagram indicates the possible scenario combinations.



### 3.6 Using SAP BEST PRACTICES in a Development Landscape

The following diagram describes how SAP BEST PRACTICES are used in a development landscape. A distinction is made here between BC Sets and CATTs.



### 3.6.1 BC Sets

The preconfiguration delivered in the form of Business Configuration Sets (BC Sets) can either be used to set up a prototype or a development system.

By using the installation roles, you can choose which preconfiguration to use for the implementation of a customer scenario. When activating the BC Sets, Configuration settings are automatically carried out and saved in transport requests.

If necessary, Delta Configuration follows in order to implement further customer-specific requests that are not covered by the SAP BEST PRACTICES scenarios.

The transport requests resulting from the BC Set activation and Delta Configuration are then imported into the quality assurance or production system.

The use of BC Sets in the production system does not make sense and is prevented by the tool.

### 3.6.2 CATTs

CATTs are used within the context of SAP BEST PRACTICES to create master data.

SAP Best Practices for CRM does not provide CATTs for master data creation because all central master data (e.g. business partners, products, pricing information) will be replicated from the connected ERP system into the CRM system.

## 3.7 Schedule and Required Resources

The potential time and cost savings that you can achieve by using SAP BEST PRACTICES is difficult to estimate as it is dependant to a large extent on individual project conditions.

The following information regarding time planning and required resources is based on tests and previous experience with pilot projects for an initial setup of the development system with SAP Best Practices for CRM:

#### **Determining Factors:**

- Basis installation of the environment is a prerequisite and is not included in the estimate
- Integration of an existing SAP R/3 system with a download of the data is included in the estimate
- Connection of BW is included in the estimate

### **Schedule:**

Total duration for first scenario (incl. download from R/3): around 2-3 weeks

Duration for every other scenario around 3-4 days

### **Least Amount of Time Required for the Phases (First Scenario):**

#### **Day 1**

- System check
- Preparation of the installation
- Import the SAP BEST PRACTICES transports
- Import necessary notes

#### **Day 2**

- Connectivity and Middleware generation

#### **Day 3-6**

- Data replication from R/3

#### **Day 7-9**

- Scenario configuration

#### **Day 10:**

- Scenario test

Individual phases may take longer depending on the completeness and quality of the basis installation as well as the complexity of the R/3 system.

### **Necessary Resources Profile (A Scenario)**

- Application consultant
  - CRM, R/3 SD

Additional SAP components if they need to be integrated:

- BW
- Basis consultant (importing SAP BEST PRACTICES transports and if applicable, Connectivity)
- Middleware consultant (download from SAP R/3)

Customers who are experienced in the SAP environment using SAP BEST PRACTICES can also play a large role in the installation of scenarios. The individual steps are fully documented and can, to a large extent, be processed independently, if this is required in the project. Due to the complexity of individual installation steps, however, specialist knowledge is required in

certain areas, for example, in Middleware, so it is generally not advised to leave installation completely in the hands of the customers without additional consultation. Consultants should be involved in any case.

### 3.8 Hardware Requirements

No hardware specifications are delivered with SAP BEST PRACTICES as these depend on a number of different factors that vary from project to project, for example, project scope, relevant scenarios, data volumes, required CRM components, and so on.

The following sources provide assistance with regard to hardware and sizing questions:

1. SAP BEST PRACTICES components list in connection along with the Master Guide for SAP CRM  
The current version of the Master Guide can be found on the SAP Service Marketplace (<http://service.sap.com/crm-inst>). Components that are needed in the concrete project environment can be identified in both the above-mentioned documents.
2. On the SAP Service Marketplace, there is an additional document on Sizing for SAP CRM  
<http://service.sap.com/sizing> → Media Center.

### 3.9 Further Essential Information on SAP Best Practices

Further information on SAP Best Practices can be found in the document “*Essential Information (How to work with SAP Best Practices)*” which is located on the SAP Best Practices documentation CDs. The aim of that document is to enable you to use the tools, configuration and documentation delivered with SAP Best Practices, and thus to successfully install SAP Best Practices.

The main sections of that document

- explain the concept of SAP Best Practices installations and provide an overview of the Building Block approach and a general idea of the installation process using Building Blocks
- show how to use the documentation delivered with SAP Best Practices
- provide detailed instructions on how to use the SAP Best Practices configuration tools, such as user roles, BC Sets and CATT procedures
- highlight which SAP Best Practices Add-Ons you need to install for a specific solution
- provide explanations and support for the most common errors and mistakes that can occur during an installation

To ensure a successful installation and to prevent possible mistakes, read the document “*Essential Information*” before you start with any installation activity.

## 4 Scenario Scope

### 4.1 Scenario Coverage

SAP Best Practices for CRM cover the following scenarios:

#### Marketing Management

- Campaign Management
- Inbound Lead Management
- Outbound Lead Management

#### Sales

- Opportunity Management
- Activity Management
- Internet Sales: Order Process Business-to-Business
- Internet Sales: Order Process Business-to-Consumer
- Internet Sales: Order Process Business-to-Business R/3 Edition
- Internet Sales: Order Process Business-to-Consumer R/3 Edition
- Interaction Center(WebClient): Inbound Telesales
- Interaction Center(WebClient): Outbound Telesales

#### Service

- E-Service: Solution Search
- E-Service: Service Request Management
- E-Service: Complaint Management
- Interaction Center(WebClient): Information Help Desk
- Interaction Center(WebClient): Customer Service & Support
- Service Order Management
- Complaint Management

#### Analytics

- CRM Lead Analysis
- CRM Activities Analysis
- CRM Opportunities Analysis
- CRM Customer Interaction Center (CIC) Analysis
- CRM Sales Order Complaints Analysis
- CRM Service Quality Analysis

Not all scenarios that are possible within the scope of mySAP CRM are delivered as SAP BEST PRACTICES scenarios. For those scenarios that are not

covered, for example, the field sales scenarios of mySAP CRM Sales such as *Customer Visit & Order Entry*, there is information (scenario descriptions, C-Business Maps, Configuration Guides) available in the SAP Solution Manager ("Integrated Business Scenarios"). For more information see <http://service.sap.com/solutionmanagement> (see also chapter 2.3.3 *Contrast to "Integrated Business Scenarios"*).

## 4.2 Using Standalone

SAP Best Practices for CRM are primarily designed for using with an SAP R/3-System as a back end. There are two main reasons for this approach, firstly, to be oriented towards the existing SAP R/3 customer base and secondly, to present the integration of the supply chain in the CRM scenarios.

It also makes sense to use SAP BEST PRACTICES for the standalone case, because central parts of the documentation and configuration continue to remain valid.

The following procedure is recommended:

1. Import the unchanged SAP BEST PRACTICES add-on.
2. In the building block *Connectivity* all activities dealing with the connection of SAP R/3 systems can be left out.
3. The building block *Generation* remains valid.
4. The building block *Replication* primarily describes how to replicate configuration and master data from the SAP R/3 system into the SAP CRM system. In this chapter, all activities that are not related to downloading are relevant, for example, the setting up of an organization structure.

If there is a missing download, all configuration and master data that normally is taken from the SAP R/3 system should be manually created in the CRM system.

5. The activities described in the other building blocks remain valid as far as they do not deal with configuration in the SAP R/3 system.

## 4.3 Available Language Versions

SAP Best Practices for CRM are currently only fully available in English.

For some objects a German version is provided in addition.

Area	Object	Language	
		EN	DE
<b>Documentation</b>	Installation Guide	X	
	Configuration Guide	X	
	Business Process Procedures	X	X
	Scenario Documentation	X	X
<b>Configuration</b>	Configuration	X	X
	Master Data	X	

Key: X = available

For latest information about current available and planned language versions please see [www.service.sap.com/bestpractices](http://www.service.sap.com/bestpractices) → *Release Planning*.