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How to Perform Initial Load of Data from SAP CRM to SAP Cloud for Customer

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Content

1 How to Perform Initial Load of Data from SAP CRM to SAP Cloud for Customer

About this Document

When implementing SAP Cloud for Customer and integrating with SAP CRM, you need to initially load information from SAP CRM into SAP Cloud for Customer. This document describes the objects you may need to know, how to load them, and dependencies between the objects.

For initial load performance considerations, see the document *Best Practices for Optimal Performance of Data Loads into SAP Cloud for Customer* on the SAP Community Network.

Prerequisites

Technical connectivity exists between SAP CRM and SAP Cloud for Customer. Integration configuration settings are described in the integration guide available on the Prepackaged Integration with SAP CRM.

Process

1. Copy and adapt the appropriate ABAP template report for the required objects data.
2. Run the initial data load for each object required.

1.1 Template Reports

SAP provides ABAP template reports (listed in the Initial Load guide) and they can be used for initial load scenarios.

Copy the template reports and adapt them to meet your business requirements.

1. To access the template reports, execute transaction *SE38*.
2. Adapt the templates according to modifications made in your SAP CRM system.

> ⓘ Note
>
> If you have not made modifications in your SAP CRM system, you can use the templates as delivered. If you have made modifications in your SAP CRM system, refer to the SAP Help Portal for more information about adapting the templates.

1.2 Replication of Job IDs

Job IDs must be extracted and loaded into the Cloud solution via the Migration Workbench. This is required for loading the employees into the Cloud solution.

Ensure that the ID is created in the Cloud solution in the same format as in SAP CRM. The jobs can be displayed in CRM using the transaction *PPOMW*. The job IDs can be extracted from table *HRP1000* using the object type 'C.'"

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1.3 Executing Initial Load Reports

Assuming you have completed the necessary pre-requisites such as code list mapping, job ID load, you can now proceed with executing the initial load reports that are mentioned above. It is recommended to load small numbers of instances first and increase the package size

1.4 Steps to Consider for Bulking

Use the performance best practices at for general information on bulking.

You can access the performance practices in See http://scn.sap.com/docs/DOC-62439 The following are some specifics in regards to key objects in SAP CRM.

Accounts/contacts and employees must be loaded separately. If the SAP CRM system is sending employee and account messages separately, the routing condition assigns employee messages to employee mapping and account messages to business partner account mapping. For example, if you send three IDocs in a package for accounts only, then these three IDocs will be bundled according to the business partner routing condition. The business partner mapping will be carried out, which supports bulking.

We recommend that you do not send bulk messages for employees because employee mapping does currently not support bulking. If a bulk message is sent from SAP CRM to SAP middleware, it does not produce expected result. For employees, the mapping must be adjusted.

> ⓘ Note
>
> For Bulking scenarios, ensure that each of the objects are grouped separately. Otherwise you could have, for example, leads and opportunities alike collected in the same bulk message

Procedure

Prepare the reports for the initial load.

1. In the SAP CRM system, execute transaction *WE20*.
2. In the Outbound Parameters field, expand the message type for the partner profile and select the object that you created.
3. In the *Output Mode* section of the screen, select *Collect IDocs*, then choose *Details*.
4. Enter a suitable package size.

   > ⓘ Note
   >
   > The package size must be greater than or equal to the maximum number of relationships available for the accounts in the SAP CRM system. This is due to the technical limitation in the Cloud solution. We recommend that you send all relationships of an account in a single package if possible.

5. Click *Save*.
6. Repeat steps 1 through 5 for each object.
7. Start the initial load.
8. Execute transaction *SE38*.

9. Create a variant according to the number of products that you want to send

10. Enter report *RSEOUT00*.

11. Choose *Start with Variant*.

12. Specify the variant you created.

13. When the initial load is finished, you must change the settings in the partner profile. To do this, repeat steps 1 through 3, and chose the option *Transfer IDoc Immediately* for each object.

2 Basic Considerations for Initial Load of Master Data

For integrating your SAP CRM system to your SAP Cloud for Customer solution, one of the critical aspects is loading of your master data.

The following diagram shows the master data objects available with the prepackaged integration content.
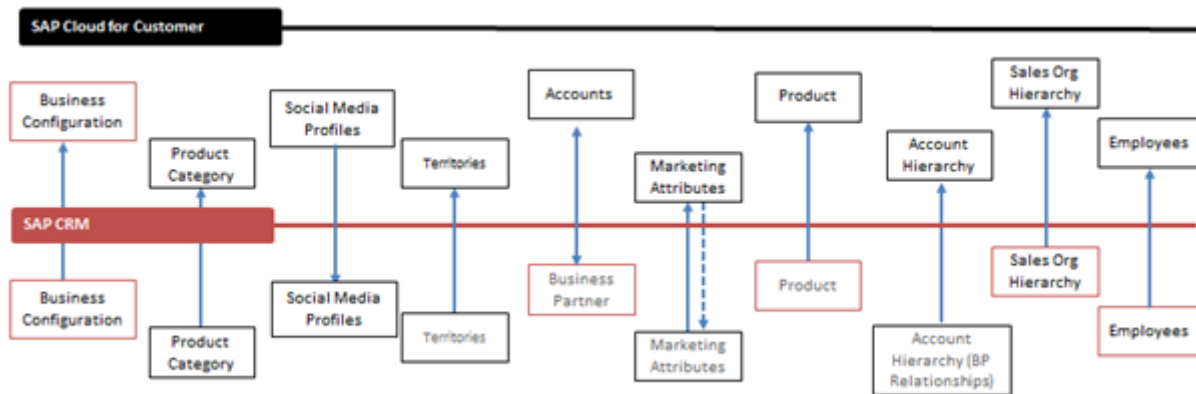
The diagram below captures the sequence in which you should perform the initial load of master data.
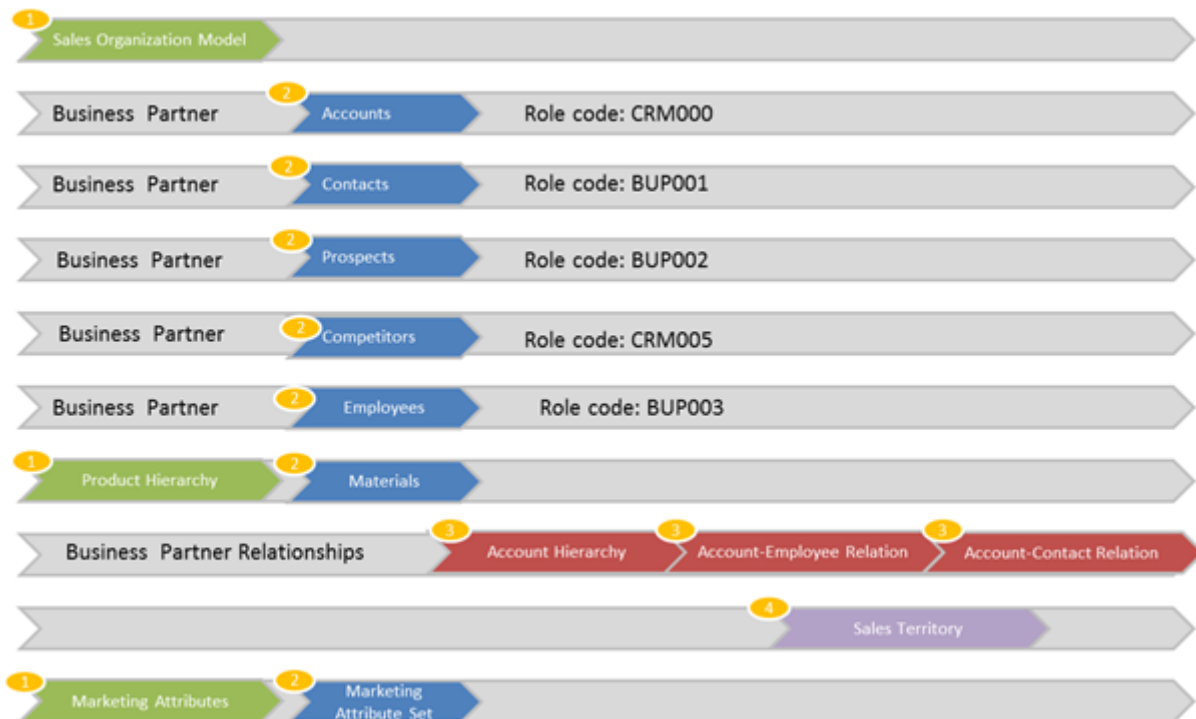
The following table gives the list of reports needed to set up the master data objects. Enhancement Spot Most reports are executed via the area menu *CRMPCD_INT_MENU*.

| Master Data object	Business Object Report / Area Menu	Pre-requisite	Business Object(s)	Enhancement Spot	Classic BADI
Sales Organization	Organization Model	CRMPCD_INT_MENU	None	CRMPCD_ORG_UNIT_REPLICATION	
Employee	Business Partner	CRMPCD_INT_MENU	Sales Organization	CRMPCD_EMPLOYEE_REPLICATION	
Account	Business Partner	CRMPCD_INT_MENU	Sales Organization		CRMXIF_PARTNER_MAP
Sales Territory	Territory Model	CRMPCD_INT_MENU	Employee, Account	CRMPCD_TERRITORY_REPLICATION	
Contact	Business Partner	CRMPCD_INT_MENU	None		CRMXIF_PARTNER_MAP
Prospect	Business Partner	CRMPCD_INT_MENU	Sales Organization		CRMXIF_PARTNER_MAP
Competitor	Business Partner	CRMPCD_INT_MENU	Sales Organization		CRMXIF_PARTNER_MAP
Product Hierarchy	Product Hierarchy	CRMPCD_INT_MENU	None	CRMPCD_PCH_REPLICATION	
Product Materials	Product Materials	CRMPCD_INT_MENU	Sales Organization, Account		COMXIF_PROD_MAT_MAP
Account Hierarchy	Business Partner Relation	CRMPCD_INT_MENU	Sales Organization, Account, Employee		CRMXIF_PARTNER_R_MAP
Account-Employee Relation	Business Partner Relation	CRMPCD_INT_MENU	Sales Organization, Account		CRMXIF_PARTNER_MAP
Account-Contact Relation	Business Partner Relation	CRMPCD_INT_MENU	Sales Organization, Account, Contact		CRMXIF_PARTNER_MAP
Bulk Initial Load	All Objects	CRMPCD_INT_MENU	See object level dependency		
Marketing Attribute	Business Partner	CRMPCD_INT_MENU	None		
Marketing Attribute Set	Business Partner	CRMPCD_INT_MENU	Marketing Attribute		

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Basic Considerations for Initial Load of Master Data

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Area menu *CRMPCD_INT_MENU* is a central location for monitoring and performing initial loads. All load reports are centralized to the area menu. Documentation is provided for all SAP Cloud for Customer specific loading
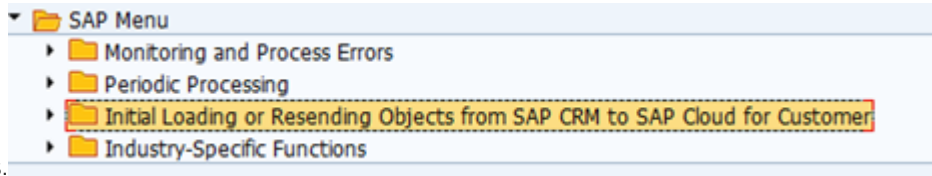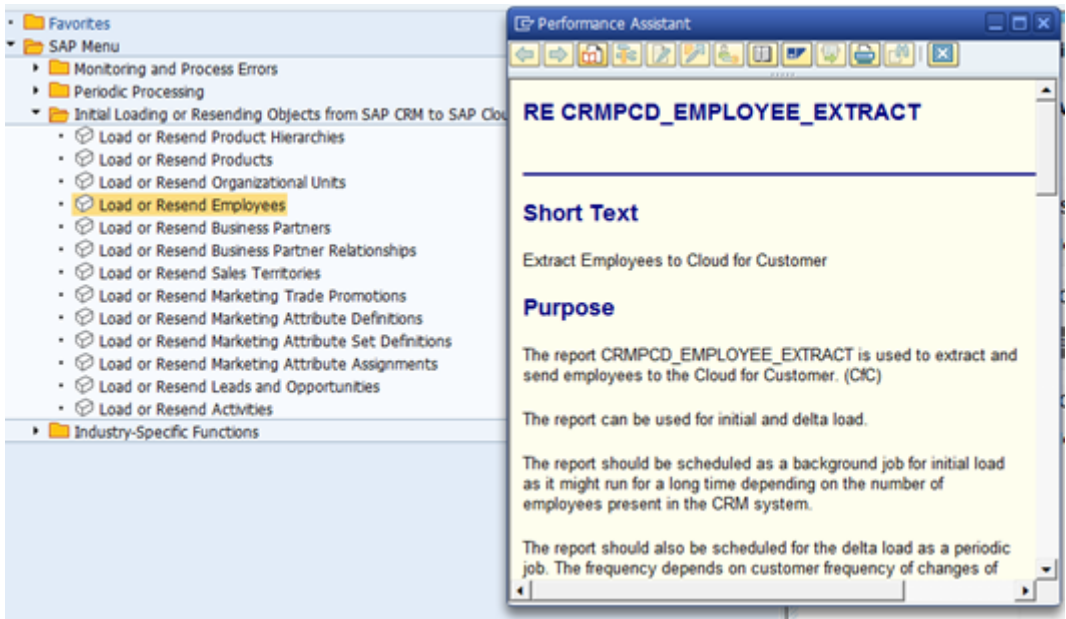

reports.

When you expand the menu *Initial Loading or Resending Objects form SAP CRM to* SAP Cloud for Customer, you will see the supported objects.
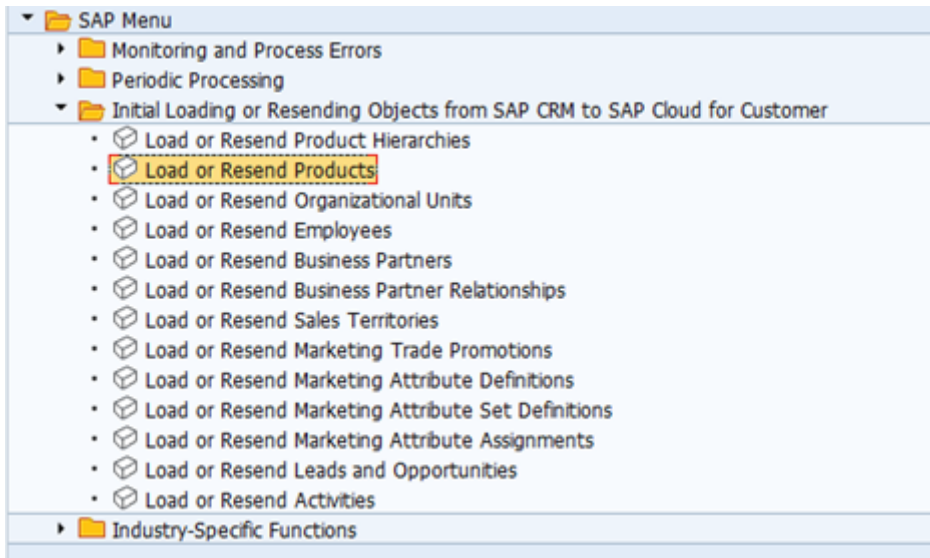
You display the documentation for each report. The documentation will include any prerequisites for the initial load. The following example shows the documentation for the employees initial load report

3 Instructions for Loading Master Data

This chapter provides step-by-step instructions to load the master data into SAP Cloud for Customer.

3.1 Initial Load of Organization Data

Replication messages of organization units are processed by the background job "Organization Replication Request Processing Run" in the Cloud solution.

If the organization units do not appear in the Cloud solution after you performed the load, you may check whether the background job for the organization replication is already executed or the next job is scheduled.

Procedure

To do this, choose the Background Jobs view in the *Administrator work center* and check the run type *Organization Replication Request Processing Run*

1. Select the organizational structure you want to replicate from SAP CRM.

Assignment Plan (CRM)	Code	ID	Business part...	Valid from	Valid to	Assigned a...	Assigned u...
▼ ☐ Almica Inc	2000	O 50010876	0000436279	01.01.2000	Unlimited		
▼ ☐ Sales Organization	S1000	O 50010877	0000436280	01.01.2000	Unlimited	01.01.2000	Unlimited
▶ 🔲 QM	QM	S 50010881		07.02.2012	Unlimited	07.02.2012	Unlimited
▶ 👤 Sales executive	Sales	S 50010978		11.05.2012	Unlimited	11.05.2012	Unlimited
▶ 👤 Territory Respons	TERRMAN	S 50011097		10.11.2012	Unlimited	16.11.2012	Unlimited
· 👤 New Position	New Position	S 50011101		30.11.2012	Unlimited	30.11.2012	Unlimited
▼ ☐ Direct Sales	S1100	O 50010878	0000436281	01.01.2000	Unlimited	01.01.2000	Unlimited
▶ 👤 New Position	New Position	S 50010901		10.02.2012	Unlimited	10.02.2012	Unlimited
· ☐ Sales Office 1	SOFF1	O 50011156	0000507833	18.04.2013	Unlimited	18.04.2013	Unlimited
▶ ☐ Indirect Sales	S1200	O 50010879	0000436282	01.01.2000	Unlimited	01.01.2000	Unlimited
▶ ☐ Service Organizat	S3000	O 50011022	0000500010	01.08.2012	Unlimited	01.08.2012	Unlimited

> ⓘ Note
>
> You can also search for the company in Organization Unit. For example, you want to replicate the entire organization structure for a company Almica.

2. Maintain code values for organization data.

3. From the area menu *CRMPCD_INT_MENU* select *Load* or *Resend Sales Territories*.

Extract Organizational Units to Customer OnDemand

Organizational Units

- ● Initial Load
- ○ Delta Load

- ○ Is company created in CoD ?
- ● Root Org. Unit is Company ?

Company ID in CoD	
Root Organizational Unit	2000
Plan Version	01
Key Date	07.11.2013

| Package Size | 300 |
| Site Name | 0HS6MJJ_Q9CCLNT400 |

☐ Delete Processed Chng Pointers

4. Enter the following details to execute the report.
    - Initial Load
    - Root Org. Unit is Company
    - Root Organization Unit
    - Plan Version
    - Key Date
    - Package Size
    - Site Name

5. After successfully executing the report, go to transaction code *WE05* to view the status of the IDocs.

IDoc List

IDocs	Num...
▼ 🗀 Selected IDocs	001253
▼ 🗀 Outbound IDocs	000002
▶ 🗀 CRMPCD_ORG_UNIT_SAV	000001
🗀 CRMXIF_PARTNER_SAVE	000001
▼ 🗀 Inbound IDocs	001251
▶ 🗀 CRMXIF_ORDER_SAVE_M	001244
▶ 🗀 CRMXIF_PARTNER_SAVE	000007

Outbound IDocs CRMPCD_ORG_UNIT_SAVE

IDoc Number	Segm...	Sta...	Sta...	Partner	Basic type	Date creat.	Time	Messg...	Direction	Port
00000000021542...	24	03	CCO	LS/ /0HS6MJJ	CRMPCD_ORG_UNIT_SAV...	17.10.2013	19:56:30	CRMPC...	Outbox	PI_QN6233

6. Once you have confirmed the IDoc Status is successful. You can also check the status, in the ▶ *Administrator work center* ▶ *Web Service Message Monitoring view* ▶ .

Web Service Utilities: Message Monitor

New selection

Client 233 - Basic View

	Nu...	Status	Processing Status	Creation Da...	Creation ...	Execution ...	Executio...	Sender Party	Receiver Interface Name	Error Information	Message ID
	58	🟢	Delivered	17.10.2013	17:56:35	17.10.2013	17:56:38	&Q9CCLNT400	OrganizationCentreReplicationReques...		00145E5B502F1EE38DEAAE8A3AF55C97
	57	🟢	Delivered	17.10.2013	16:28:38	17.10.2013	16:28:39				00163E03552B1ED38DE925AD02764584

Web Service Message Monitoring   View ⌐ | **Export** ⌐ | Restart   Cancel   Refresh

This view allows you to monitor and process incoming and outgoing messages in an integrated system landscape. Select a message to display further details.

All   organization   ✕

	Status	Executed On	Direction	Service Interface	Party	Error Text	Created On
🟢	Successful	21.10.2013 15:24:41 UTC	Incoming	OrganizationCentreReplicationRe	Q9CCLNT400		21.10.2013 15:24:39 UTC
🟢	Successful	21.10.2013 14:29:52 UTC	Incoming	OrganizationCentreReplicationRe	Q9CCLNT400		21.10.2013 14:29:51 UTC
🟢	Successful	21.10.2013 14:29:48 UTC	Incoming	OrganizationCentreReplicationRe	Q9CCLNT400		21.10.2013 14:29:47 UTC
🟢	Successful	21.10.2013 14:29:36 UTC	Incoming	OrganizationCentreReplicationRe	Q9CCLNT400		21.10.2013 14:29:35 UTC

7. As the Employees are first replicated into the *Staging Business Object* under ▌▶ *Data Integration work center* ▶ *Organization Replication view* ❭ the organization entities need to be activated in the *Staging Area* for successful replication into SAP Cloud for Customer.

   Successful Organizational mode replication should automatically maintain the ID mapping under ▌▶ *Application and User Management* ❭ *Edit ID mapping for Integration* ❭

3.2 Initial Load of Territories

Prerequisites

- Maintain code values for accounts
- Employee
- Account

Procedure

1. Select the territory hierarchy you wish to replicate.
2. From the area menu *CRMPCD_INT_MENU* select *Load* or *Resend Sales Territories*.
3. Maintain code values for Sales Territory Data.
4. Execute the report.

> ⓘ **Note**
>
> In this example, company level 00 for *1TERY1*, *2132FG* and *21FINA* is used.

Distribute Territories

⊕ ▣

Territories

◉ Initial Load
○ Delta Load

| Territory ID | 1TERY1 | to | | ⇨ |
| Territory Level | 00 ▢ | to | | ⇨ |

Package Size   1.000
Site Name   0HS6MJJ_Q9CCLNT400

Enter the following details to execute the report

- Initial Load
- Territory ID
- Territory Level
- Package Size

- Site Name

5. After successfully executing the report, go to transaction code *WE05* to view the status of the IDocs. Once you have confirmed the IDoc Status is successful. You can also check the status, in the ▶ *Administrator work center* ▶ *Web Service Message Monitoring view* ▶ .

3.3 Initial Load of Accounts/Contacts/Prospects/ Competitors (Business Partner)

When you load business partners into the Cloud solution, only the following roles are supported in the Cloud solution

- Account (CRM000)
- Competitor (CRM005)
- Contact Person (BUP001)
- Prospect (BUP002)
- Sales and service partner (CRM011)

All other roles are filtered out. For persons, the system supports data records without a role. For organizations, at least one valid role is mandatory.

Ensure that the business partner roles codes of SAP CRM are mapped to the corresponding business partner roles codes of the Cloud solution using code list mapping in the Cloud solution.

Only the business partner categories Person and Organization are transferred to the Cloud solution. The business partner category Group is ignored during data load. (This is true for both initial download as well as delta replication.)

If time-dependent data (such as different time-dependent addresses) is maintained in the SAP CRM, only the data that is currently valid is transferred to the Cloud solution.

If the business partner has multiple addresses in SAPCRM, only the default, ship-to, bill-to and payer addresses are transferred.

Ensure that the address usage codes of SAP CRM are mapped to the corresponding address usage codes of the Cloud solution using code list mapping in the Cloud solution.

If a business partner address in SAP CRM contains multiple communication data (such as multiple telephone or fax numbers), only the default communication data is transferred to the Cloud solution. In the Cloud solution only one industry classification system 0005 is supported. Make sure that your main industry classification system of SAP CRM is mapped to the industry classification system 0005 of the Cloud solution using code list mapping the Cloud solution.

Prerequisites

- Set up Sales Organization Data
- Maintain Code Values for Business Partner

Procedure

1. Maintain Code values for Business Partner

2. From the area menu *CRMPCD_INT_MENU* select *Load* or *Resend Business Partners*.

> ⓘ Note
>
> If time-dependent data (such as different time-dependent addresses) is maintained in SAP CRM, only the data that is currently valid is transferred to the SAP Cloud solution. If a business partner address in SAP CRM contains multiple communication data (such as multiple telephone or fax numbers), only the default communication data is transferred to the Cloud solution.

3.4 Initial Load of Employees

Employee data must be replicated from SAP CRM to SAP Cloud for Customer using the dedicated Employee web service.

> ⓘ Note
>
> If you have chosen the employee replication in the Business Adaptation Catalog, the employee role is not supported via the business partner replication service. All other roles are filtered out. For employees, the system supports data records without a role. For organizations, a role is mandatory. Only the business partner categories Person and Organization are transferred to the Cloud solution. The business partner category Group is ignored during data load. (This is true for both initial download as well as data replication.)

If the configuration in the SAP middleware is done accordingly, the employees will be replicated via a dedicated service. The employee replication has to be activated in scoping in SAP Cloud for Customer.

Remarks on using the web service:

- The personnel number and user-specific information, such as log-on user ID, is included. Moreover, sales organization assignments are taken into account and do not have to be maintained manually
- The business role is not filled by default; it can be filled by means of a BAdI implementation in the employee IDoc
- If the user ID is not maintained in the Business Partner, then the user ID of the employee is defaulted to his or her e-mail address.
- The validity period of the employee is set to the validity period of his/her role assignment in SAP CRM.
- The business user can be activated immediately during replication. This is the default behavior.
- The replicated business object is not directly saved in the target business object but the saving needs to be triggered by the business user in the Data Integration work center or an automatic batch job.
  If you cannot see the employees in the Cloud solution, you can find out when the job is scheduled to run. To do this, choose the Background Jobs view in the Administrator work center.

> ⓘ **Note**
>
> Replication messages of employees are processed by a background job (scheduled job). Employees are not visible in the Cloud solution immediately but are available after the next scheduled run of the job.

Prerequisites

- Maintain code values for Employee
- Setting up Sales Organization Data
  You have the possibility for replicating employee data from SAP CRM to SAP Cloud for Customer by using the Employee web service (by selecting Employee replication in the Business Adapting Catalog)
  Points to consider:
  - The business roles are not filled by default; They can be filled by implementing a BADI in the Employee IDoc
  - If the user id is not maintained in the Business Partner, then the user id of the employee is defaulted to his/her e-mail address.
  - The validity period of the employee is set to the validity period of his/her role assignment in SAP CRM.
  - By default, users are activated in SAP Cloud for Customer
  - The replicated business object is not directly saved in the target business object but the saving needs to be triggered by the business user in the Data Integration work center or an automatic batch job. (Staging Business Object)

> ⓘ **Note**
>
> The Replication messages of employees are processed by a background job (scheduled job). Employees are not visible in the cloud solution immediately but are available after the next scheduled run of the job.

Procedure

1. Maintain complete code lists in the SAP Cloud for Customer.

2. From the area menu *CRMPCD_INT_MENU* select *Load* or *Resend Employees*.

3. Enter the below details to execute the report.

- Select Initial Load
- Enter Business Partner Number Range
- Enter Key Date
- Enter Package Size
- Enter Site Name

After successfully executing the report, go to transaction code *we05* to view the status of the IDocs.

4. Once you have confirmed, the IDoc Status is successful. You can also check the status, in the ▶ *Administrator work center* ▶ *Web Service Message Monitoring view* ❯.

As the Employees are first replicated into the *Staging Business Object* under ▶ *Data Integration work center* ▶ *Complete Employee Master Data Replication view* ❯ the Employee records need to be activated in the *Staging Area* for successful replication into SAP Cloud for Customer.

Successful Organizational mode replication should automatically maintain the ID mapping under ▐▶ *Application and User Management* ❯ *Edit ID mapping for Integration* ❯

EMPLOYEE IN REPLICATION REQUEST: 50011550

Replication Status: **Not Started**   Remote Employee ID: **50011550**   Remote Busines Partner ID: **00005**
File Name: **CRM20131029214956.0832880**

| Save and Close | Save | Close | | Replicate | Mark as Relevant | Mark as Irrelevant |

GENERAL   PERSONAL DATA   ORGANIZATIONAL ASSIGNMENT   BUSINE:

PERSONAL DATA

Remote Employee ID:	50011550
Remote System Instance ID:	Q9CCLNT400
Remote Busines Partner ID:	0000508880
Name at Birth:	
Date of Birth:	30.11.0002
Place of Birth:	

REPLICATION REQUEST

File Name:	CRM20131029214956.0832880
Creation Date:	29.10.2013 21:49 UTC
Complete Transmission Start Date:	29.10.2013

3.5   Initial Load of Product Hierarchy

You can have only one product hierarchy modeled in the Cloud solution.

For this reason, we recommend to transfer only the hierarchy that is assigned to the Sales application in SAP CRM. You can check which hierarchy is assigned to the Sales application under ▐▶ *SAP Customizing Implementation Guide* ❯ *Cross-Application Components* ❯ *SAP Product* ❯ *SAP Product* ❯ *Product Category* ❯ *Assign Category Hierarchies to Applications* ❯

Per default only the hierarchy that is assigned to the application Sales is replicated from SAP CRM to the Cloud solution. This is the fallback implementation for the Business Add-In (BAdI) *CRMPCD_PCH_FILTER* of enhancement spot *CRMPCD_PCH_REPLICATION*. If you want to change this behavior, you have to create a BAdI implementation for the mentioned BAdI. For more information, see the section *CRM: Customer Enhancements (BAdI Definitions)*.

1. Open the product hierarchy that needs to be transferred in the SAP CRM Web UI or by starting transaction *COMM_HIERARCHY*.
2. Identify the hierarchy you wish to replicate to the cloud
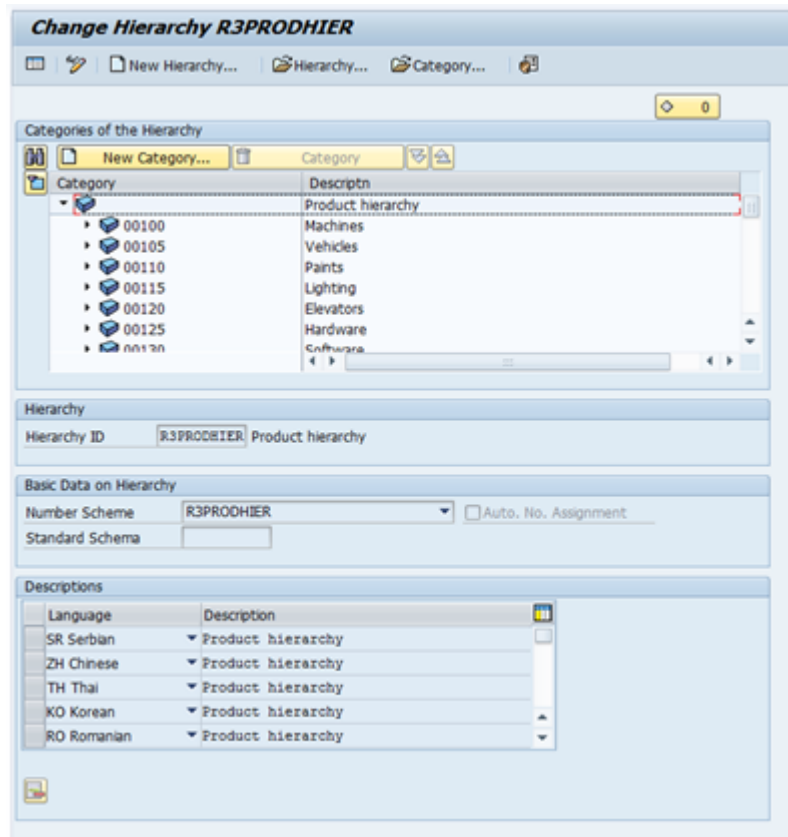
   solution.
3. From the area menu *CRMPCD_INT_MENU* select *Load* or *Resend Product Hierarchies*.

> ⓘ Note
>
> It is possible to have only one product hierarchy modeled in the cloud solution. For this reason, you can only transfer the hierarchy that is assigned to the Sales application. This is the default implementation in the *CRMPCD_PCH_FILTER BAdI*. If you want to change this behavior, then you need to adjust the BAdI implementation. For more information, see the *CRM: Customer Enhancements (BAdI Definitions)* section.

> ⓘ Note
>
> It is possible to have only one product hierarchy modeled in the cloud solution. For this reason, you can only transfer the hierarchy that is assigned to the Sales application. This is the default implementation in the *CRMPCD_PCH_FILTER BAdI*. If you want to change this behavior, then you need to adjust the BAdI implementation. For more information, see the *CRM: Customer Enhancements (BAdI Definitions)* section. There are 2 variants of running the report, to replicate the product hierarchy. Please refer to the report documentation for details on the selection criteria and executiong of the report.

4. After successfully executing the report, go to transaction code *we05* to view the status of the IDocs.

Once you have confirmed the IDoc Status is successful. You can also check the status, in the ▌▶ *Administrator work center* ▶ *Web Service Message Monitoring view* ▶ .

Successful Product Hierarchy replication should automatically maintain the ID mapping (under ▌▶ *Application and User Management* ▶ *Edit ID mapping for Integration* ▶)

3.6 Initial Load of Product Materials

It is only possible to replicate materials that are assigned to valid product categories, as this is a mandatory requirement in the Cloud solution. Therefore, we recmmend that you filter out materials that are not assigned to a product category of the hierarchy that is assigned to the Sales application. You can achieve this by implementing method CHANGE_MAPPED_DATA_OUT of the BAdI CRMXIF_PROD_MAT_MAP.

Prerequisite

- Maintain code values for Products
- Setting up Product Hierarchy Data

Procedure

1. For Product Material replication, select the products you wish to replicate from SAP CRM to SAP Cloud for Customer.

2. Maintain code values for Products.
3. Set up the Sales Organization Data.
4. Set up the Product Hierarchy Data.
5. From the area menu *CRMPCD_INT_MENU* select *Load* or *Resend*

Products.
6. Enter the below details to execute the report.
   - Product ID
   - Product Type
   - Package Size
   - Site Name
7. After successfully executing the report, go to transaction code *we05* to view the status of the IDocs. Once
   you have confirmed the IDoc Status is successful. You can also check the status, in the ▌▶ *Administrator work*
   center ❯ *Web Service Message Monitoring view* ❯.

3.7 Initial Load of Business Partner Relation (Account Hierarchy, Account-Employee, Account-Contact)

Pre-requisites

- Maintain code values for Promotions
- All Master Data

Procedure

1. From the area menu *CRMPCD_INT_MENU* select *Load* or *Resend Business Partner Relationships*.

> ⓘ Note
>
> As only one Root Account Hierarchy can be maintained on the SAP Cloud for Customer solution, select the
> parent-child relationship on SAP CRM solution that you wish to replicate.
>
> When you load Business Partner Relations into the Cloud solution, only the following relationship
> categories are supported. (This is true for both initial download as well as data replication.)

- Parent/Child Relationship
- Custom Relationships
- Has/Is Contact Person (BUR001)
- Has/Is the Employee Responsible For (BUR011)

3.8 Initial Load of Marketing Attribute and Marketing Attribute Set

The description of loading the marketing attribute is available in the document How to replicate marketing attributes from SAP CRM to SAP Cloud for Customer. Once you have read the background, you can load them via area menu *CRMPCD_INT_MENU* using the options:

1. Load or Resend Marketing Attribute Definitions
2. Load or Resend Marketing Attribute Set Definitions
3. Load or Resend Marketing Attribute Assignments

4 Basic Considerations for Initial Load of Transaction Data

This section provides a sequence diagram and a report for performing the initial load for transactional data.

The following diagram captures the sequence in which you should perform the initial load for transactional data.

Initial Load of Transaction Data from SAP CRM to SAP Cloud for Customer

The following table provides a list of reports that are required to set up the master data objects:

Transaction Data object	Business Object	Report	Pre-requisite Business Object(s)	Classic BADI
Leads	Order	CRMPCD_INT_MENU	Sales Organization, Account, Contact, Employee,	
Opportunities	Order	CRMPCD_INT_MENU	All Master Data	CRMXIF_ORDER_MAP
Activities	Order	CRMPCD_INT_MENU	All Master Data	CRMXIF_ORDER_MAP
Bulk Initial Load	All Objects	CRMPCD_IDOC_SEND_BY_CONTENT	See object level dependency	
Marketing Attributes Assignment	Business Partner	CRMPCD_INT_MENU	Marketing Attributes, Marketing Attribute Set	
Marketing Trade Promotions		CRMPCD_PROMOTION_EXTRACT		

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Basic Considerations for Initial Load of Transaction Data

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5 Instructions for Loading Transaction Data

This section provides step-by-step instructions to load the transaction data.

5.1 Initial Load of Leads, Opportunities, Activities

This section provided step-by-step instructions to select and resend leads, opportunities.

Prerequisite

- Maintain Code Values
- All Master Data

Procedure

1. From the area menu *CRMPCD_INT_MENU* select Load or Resend Leads and
   Opportunities. This is report *CRMPCD_ORDER_EXTRACT* and is used for all transaction

   data.
2. In the *Process Type* enter *LEAD* for leads, *OPPT* for opportunities. For Activities, the various activity types
   integrated with SAP Cloud for Customer have *COD* included in the description. Those activity types are: 000
   for appointment, 002 for incoming call, 003 for outgoing call, 004 for incoming email, 005 for outgoing email,
   1003 for task. *GLG NEDS CONFIRMATION*

Trans.Type	Short Description	Description	Inactive
0000	Appointment	CoD Appointment	
0001	Interaction Log	Interaction Log	
0002	Incoming Call	CoD Incoming Telephone Call	
0003	Outgoing Phone Call	Outgoing Telephone Call	X
0004	COD E-Mail	COD Email	
0005	Outgoing E-Mail	CoD Outgoing E-Mail	
0010	Interaction Record	Interaction Record	
0020	Bus.Act. with Prods	Business Activity with Products	
0025	Bus. Act. (Simple)	Business Activity (Simple View)	
0030	Callback Request	Callback Req. Activity for Web Channel	
0100	Lean Int. Record	Lean Interaction Record	
1001	Meeting	Conversation w. Departmental Colleagues	
1003	Task	Task	
1004	Task (Simple)	Task (Simple View)	X

.

3. Enter the folowing details to execute the report.
   - Order ID range
   - Process Type for leads, opportunities, or activities
   - Additional filter criteria such as Sales org, Status if required
   - Package Size
   - Site Name
4. After successfully executing the report, go to transaction code *WE05* to view the status of the IDocs. Once you have confirmed the IDoc status is successful. You can also check the status, in the ▶ *Administrator work center* ▶ *Web Service Message Monitoring view* ▶ .

5.2   Initial Load of Marketing Attribute Assignment to BP

The description of loading the marketing attribute is available in the document How to replicate marketing attributes from SAP CRM to SAP Cloud for Customer. Once you have read the background, you can load them via area menu *CRMPCD_INT_MENU* using the options:

1. Load or Resend Marketing Attribute Definitions
2. Load or Resend Marketing Attribute Set Definitions
3. Load or Resend Marketing Attribute Assignments

Procedure

1. Ensure successful processing of the inbound IDoc *CLFMAS*.
2. To assign business partner GUID to the business attribute assignments replicated from Cloud to CRM, execute report *CRM_MKTBP_ASSIGN_GUID* in transaction SE38, with the following input parameters

- **ANZ_AUSP**: Number of rows to be modified during each update. Recommended value is 10,000
- **M_COUNT**: A number equal to or greater than the number of entries in table 'INOB' in CRM system. Normal value is 200,00

5.3   Initial Load of Trade Promotion Management

Pre-requisites

- Maintain code values for Promotions
- All Master Data

Procedure

1. From the area menu *CRMPCD_INT_MENU* select *Load* or *Resend Trade Promotions*.
2. Enter the following details to execute the report.
   - Enter the *External ID range*
   - Enter additional filter criteria such as *Promotion Type*, *Status*, *Buying Period*, if required
   - Enter *Batch Packet Size*
   - Enter *Site Name*

Extract Marketing Promotions to Cloud for Customer

Selection of Promotions

External ID	KS10	to	KS19
Promotion Type	0002	to	
Status	I1004	to	
Buying Period - Days Behind			
Buying Period - Days Ahead			

Processing

✓ Batch processing
Batch Packet Size	500
Batch Processing Group	
Batch Job User ID	

☐ Test Mode

Extract to site

Site Name	0LO7ESN

Log

Application Log Level (1-4)	3

3. After successfully executing the report, go to transaction code *WE05* to view the status of the IDocs. Once you have confirmed the IDoc Status is successful. You can also check the status, in the ▶ *Administrator work center* ▶ *Web Service Message Monitoring view* ▶.

5.4 Initial Load of Campaigns

1. From the area menu *CRMPCD_INT_MENU*, select *Load or Resend Trade Promotions*.
2. Enter the ID, Campaign Type or status details and execute the report. The selection fields are not mandatory and if left blank will replicate all available campaigns to SAP Cloud for Customer. Site Name is mandatory and has to be filled with the SAP Cloud for Customer logical system to which the data has to be replicated.

3. You can also trigger the IDocs in batches (parallel processing) by selecting the *Batch Processing* check box, and then enter the *Batch Size* and *Batch Processing Group* information.
4. Deselect the *Test Mode for IDocs* checkbox to be generated and actual replication to happen.

5.5 Attachment Replication

There is no initial load report available for replicating attachments. It has to be created manually using the following code example as a template.

> ⓘ **Note**
>
> Execute the load of the host object instances before loading the attachments. Packaging can be up to 500-800 MB per package. If no receiver is provided, the attachments are then sent to the same system as the host

```abap
INCLUDE crm_object_types_con.

PARAMETERS: p_opp_id TYPE crmt_object_id,
            p_tenant TYPE sld_bskey.

DATA: lr_opp_attach_send TYPE REF TO cl_crmpcd_replicate_attachment,
      lt_bo TYPE sibflporbt,
      ls_bo TYPE sibflporb,
      lt_business_system TYPE sld_t_bskey,
      lv_header_guid TYPE crmt_object_guid.




INSERT p_tenant INTO TABLE lt_business_system.

CALL FUNCTION 'CRM_ORDER_CONVERT_DOCNUMBER'
  EXPORTING
    iv_object_id   = p_opp_id
    iv_object_type = gc_object_type-opportunity
  IMPORTING
    ev_header_guid = lv_header_guid
  EXCEPTIONS
    OTHERS         = 1.
IF sy-subrc EQ 0.
ENDIF.

ls_bo-catid = 'BO'.
ls_bo-instid = lv_header_guid.
ls_bo-typeid = gc_object_type-opportunity.
INSERT ls_bo INTO TABLE lt_bo.

lr_opp_attach_send = cl_crmpcd_replicate_attachment=>get_instance( ).
lr_opp_attach_send->send( it_receivers    = lt_business_system
                          it_business_objects = lt_bo ).

COMMIT WORK.
```

object instance.

5.6 Replication of Organizational Management Job IDs

If you chose to replicate org management job IDs, you must use the Migration Workbench. The Job ID's are not required in SAP Cloud for Customer. Ensure that the ID is created in the Cloud solution in the same format as in SAP CRM. The jobs can be displayed in CRM using the transaction *PPOMW*. The job IDs can be extracted from table *HRP1000* using the object type '*C*'."

6 Delta Load of Data

This section describes the steps required for the delta load for territories, organization units and employees.

The following report with delta load option must be scheduled as a periodic background jobs (via transaction *SM37*) in your SAP CRM system. The frequency may vary based on the business process and the frequency of the changes in your SAP CRM system.

Business Object	ABAP Report
Territory	CRMPCD_TERRITORY_TEST CRMPCD_TERRITORY_TIME_SLICES
Promotions	CRMPCD_PROMOTION_EXTRACT
Organization Unit	CRMPCD_ORG_UNIT_EXTRACT
Employee	CRMPCD_EMPLOYEE_EXTRACT
Marketing Attribute	RBDMIDOC
Marketing Attribute Set	RBDMIDOC
Marketing Attribute Assignment	RBDMIDOC

Business Partner Replication

The business partner data in SAP Cloud for Customer is time independent, whereas in CRM could be time dependent based on the customize settings in CRM. This could lead to multiple time slices, for a business partner instance in CRM. While replicating from SAP CRM to SAP Cloud for Customer, only the current active time slice is considered. When a new time slice gets activated in CRM, the IDocs are not sent out automatically, but this has to be triggered using the *BUPTDTRANSMIT* report. See the report documentation in the CRM system.

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