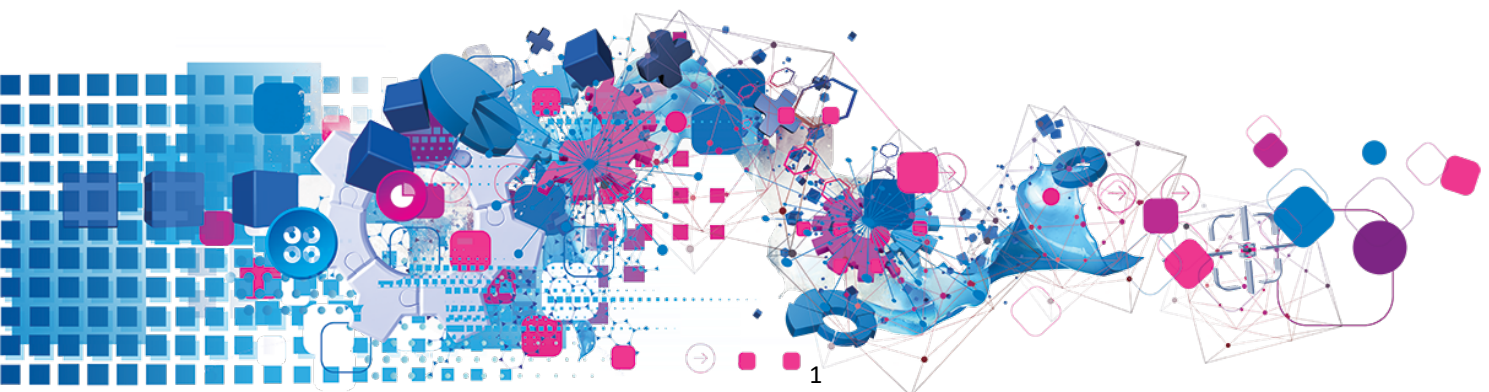experian™

Experian Data Validation for SAP CRM 7

Installation, Integration and Configuration Guide

Version: **8**

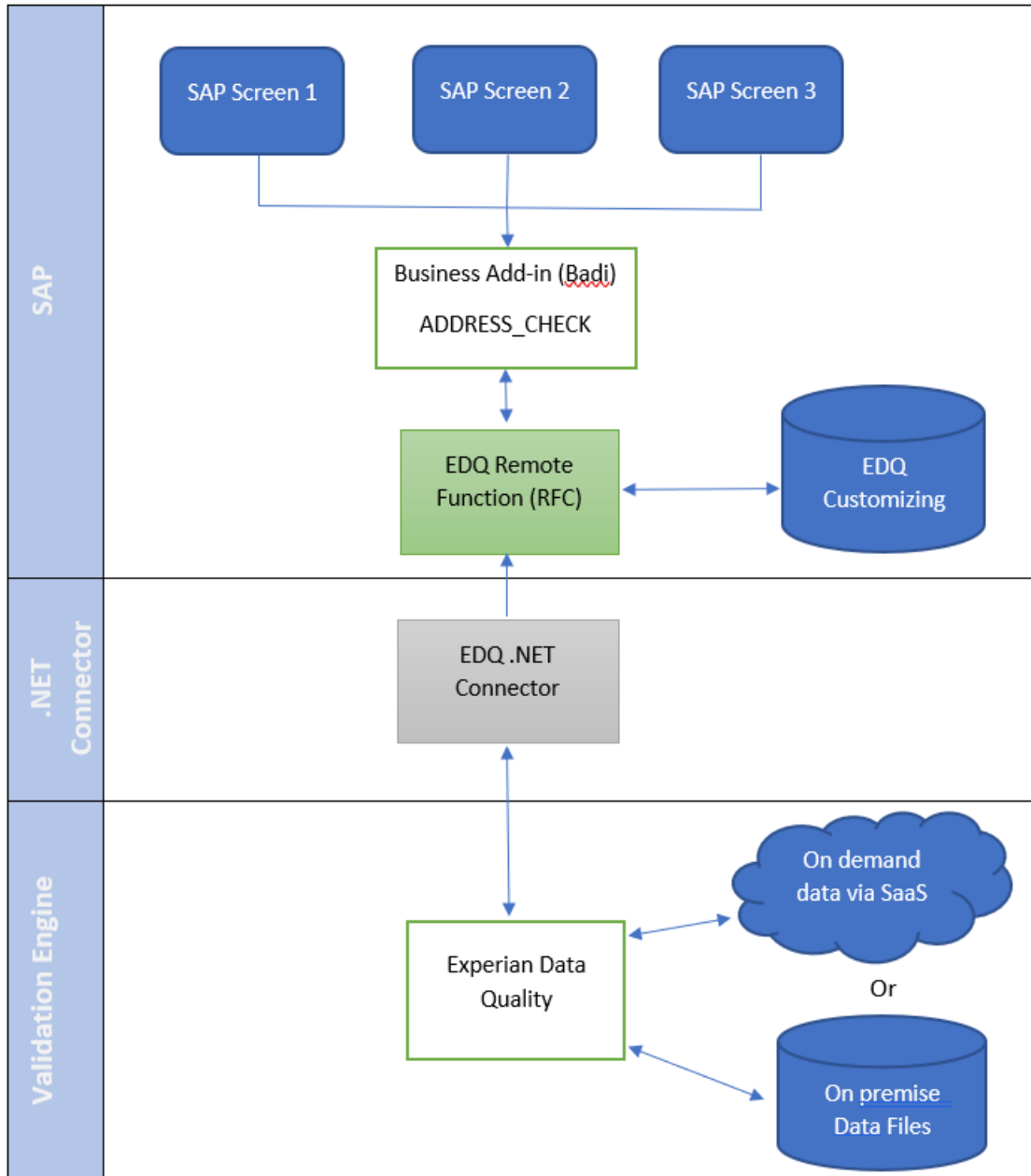Last updated: **July 2021**

Contents

1 Overview

1.2 SAP CRM7 Solution Architecture

1.3 Process flow

The SAP CRM 7 web UI supports four core business areas within SAP: **Sales**, **Service**, **Marketing**, and **Interaction Centre.** There are a few SAP-standard web UI components (e.g. **ICCMP_BP_SEARCH, ICCMP_BP_DETAIL**, and **BP_HEAD/BP_ADDR/BP_CONT**) which handle address data in SAP CRM.

The components of Experian Data Quality for SAP CRM are:

- Pro Web (or On Demand)

- Configuration tool

- EDQ-specific 'ADDRESS_CHECK' BAdI implementation

- Custom Web UI component

- Enhanced SAP-standard web UI components

- SAP .NET Connector Service

- RFC function modules

- Configuring entries in SAP-standard tables

2 Installation

2.1 Add address layouts to Experian Pro

First, configure the Experian Pro Solution you installed previously (Pro Web or Pro On Demand).

> **REAL-TIME ADDRESS VALIDATION LAYOUT:**

1. Click on the Experian Data Quality for SAP CRM 7 installation image and open the **Pro Web Layouts** folder.

2. Open the **qawserve sections.txt** file with a text editor.

3. Copy the contents of the file (**Ctrl+A** and **Ctrl+C).**

4. Navigate to the Pro Web installation directory (default location: **C:\Program Files\QAS\QAS Pro Web**

5. Open the **qawserve.ini file** with a text editor.

6. At the end of the file, insert a new line by pressing **Enter**. Then, paste the contents which were copied during step 3 (**Ctrl+V**).

7. Save all changes.

8. Allow the changes to take effect by restarting **Pro Web**:

    a. Navigate to **Windows Control Panel** > **Administrative Tools** > **Services**.

    b. Scroll to **QAS Pro Web Server x.xx** (**x.xx** is the version number of your Pro Web installation).

    c. Right-click the service and select **Restart**.

9. Once the Pro Web service has started, navigate to **Start** > **QAS Pro Web 7.25** (or **7.15**) > **Test Harness**.

10. Enter `#d` to see installed datasets.

11. If you are configuring multiple countries, enter `#d<country number>` to switch to the required country. Example: `#d 1`.

12. Enter **#1** to see a list of layouts. The SAP layout should appear in this list. Enter **#1 <SAP layout number>** to switch to SAP. Example: **#1 3**.

13. Test with a known address. Example: **1 river rd | new york | ny | 12345**.

```
Enter command or search: #1
Layouts Available:
 0 - < QAS standard layout >  - Default View
 1 - < Default >              - Default View
 2 - Database layout          - United States of America 7-line fixed format
 3 - SAP                      - Default View

Layout is set to: < QAS standard layout >

Enter command or search: #1 3
Layout is set to: SAP

Enter command or search: 1 river rd | new york | ny | 12345
0  =  1 River Rd, Schenectady NY              12345-6000 100%

Auto-formatting first item

Content         Label            Address Line
-------         -----            ------------
Address         PRIMARYNUMBER    1
Address         SECONDARYNUMBER
Address         STREET           River Rd
Address         CITYNAME         Schenectady
Address         ZIPCODE          12345-6000
Address         STATECODE        NY
Address         POBOX

Enter command or search:
```
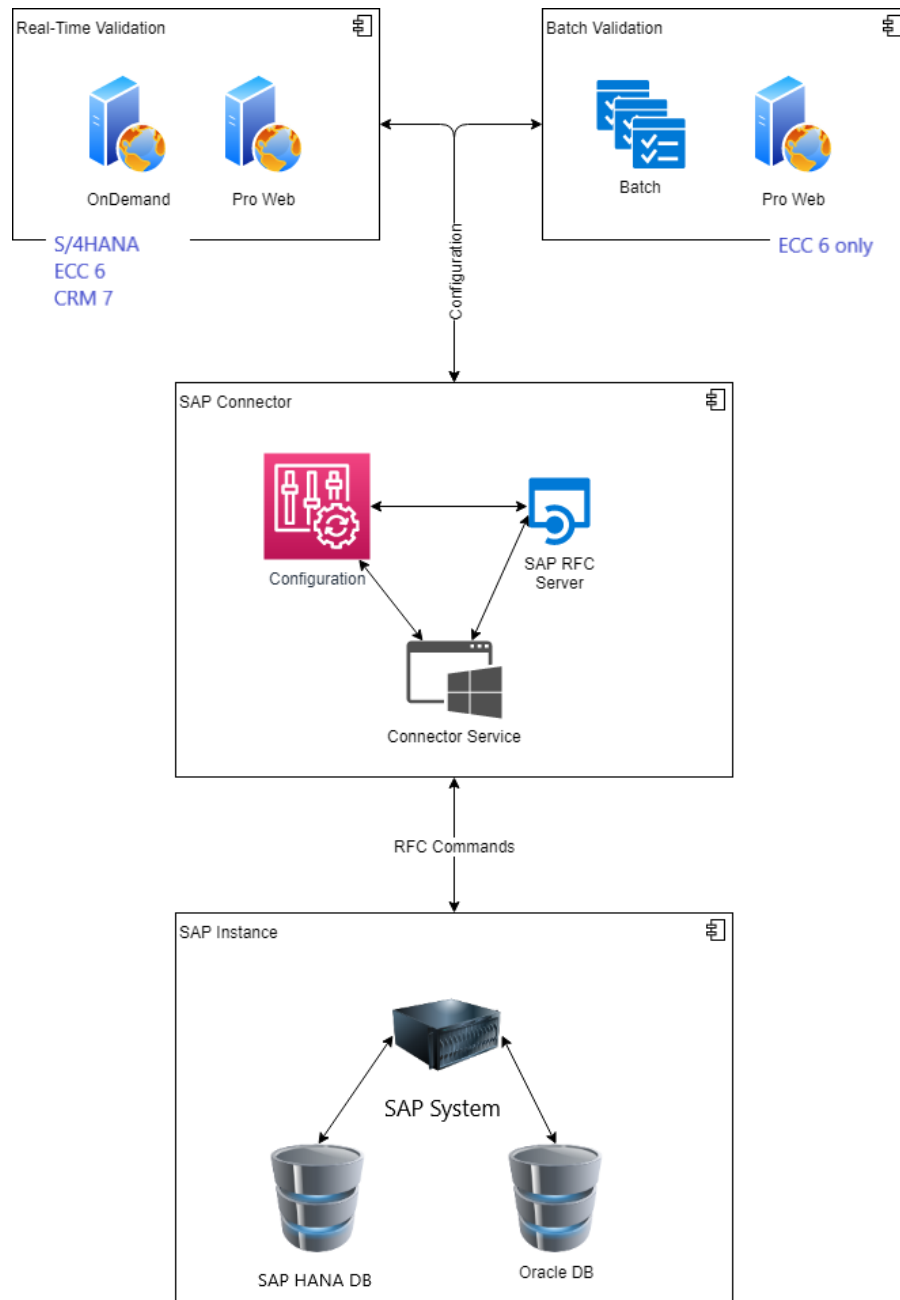
If you have chosen the hosted Experian solution, Pro OnDemand for hosted datasets, then the authentication tokens you will have been given upon purchasing these products must be activated and layouts chosen for use within SAP.

2.2 Install the Experian SAP Connector

1. Navigate to the Experian Data Quality for SAP CRM installation folder (provided by us at the point of purchase).

2. Copy all the Experian SAP Connector files in this folder to the location where you

choose to install them. Example: **E:\Qas\QASSAPConnector**.

3. Open the **qaspwc.exe** configuration file with a text editor.

4. Edit the **`<DestinationConfiguration>`** and **`<ServerConfiguration>`** settings on lines 20 and 27 to include the SAP application server names, as well as the service credentials to your SAP environment.

```
<DestinationConfiguration>

        <destinations>

          <add NAME="NCO_CLIENT" USER="Service_User"
PASSWD="Service_Password" CLIENT="001" LANG="EN"
ASHOST="Server.domain.com" SYSNR="05" POOL_SIZE="5"
MAX_POOL_SIZE="15"/>

        </destinations>
```

```
<ServerConfiguration>

        <servers>

          <add NAME="NCO_SERVER" GWHOST="Server.domain.com"
GWSERV="server" PROGRAM_ID="PROWEB"
REPOSITORY_DESTINATION="NCO_CLIENT" REG_COUNT="10"/>

        </servers>
```

- **For Pro Web**: Edit the **`com.qas.proweb.serverURL`** field so that **`SERVERNAME`** is the name of the server where Experian Pro Web is installed, and **`PORT`** is the Port number it was installed to run with.

```
<add key="com.qas.proweb.serverURL"
value="http://SERVERNAME:PORT"/>
```

- **For Pro On Demand**: Remove all the value parameters and rename it to the location where Pro On Demand is installed. Example:

```
<add key="com.qas.proweb.serverURL" value="this will
point to OD"/>.
```

5. Set a value, from the options provided for Frontend to the desired solutions (line 51):

```
50    <!--options: ProWeb, ProOnDemand, ProWebBulk, BatchAPI-->
51    <add key="frontendaddressvalidationsolution" value="ProWeb" />
52    <add key="backendaddressvalidationsolution" value="" />
53    <add key="ClientSettingsProvider.ServiceUri" value="" />
```

6. Save all changes.

7. Click **Windows Start** > **Run** > **CMD** to open a command prompt.

9. Install the Windows service needed to run the SAP Connecter, using the following command:

```
sc create "EDQSAP Connector_CRM7_PROWEB725" binpath= "
E:\Qas\QASSAPConnector\qaspwc.exe" DisplayName= "EDQSAP
Connector_CRM7 "
```

2.3 Import Experian transport files

1. Copy the Transport files from the installation image (part of the product package) into the corresponding SAP folders:

   - Co-File: **K900xxx.ED1** into example: **E:\usr\sap\trans\cofiles**

   - Data-File: **R900xxx.ED1** into example: **E:\usr\sap\trans\data**

   2. Log into SAP and enter the transaction code: **STMS**.
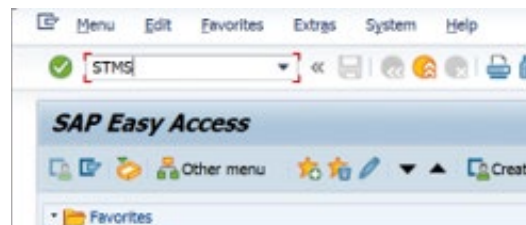
   3. Select the **Import overview** button (as shown below).
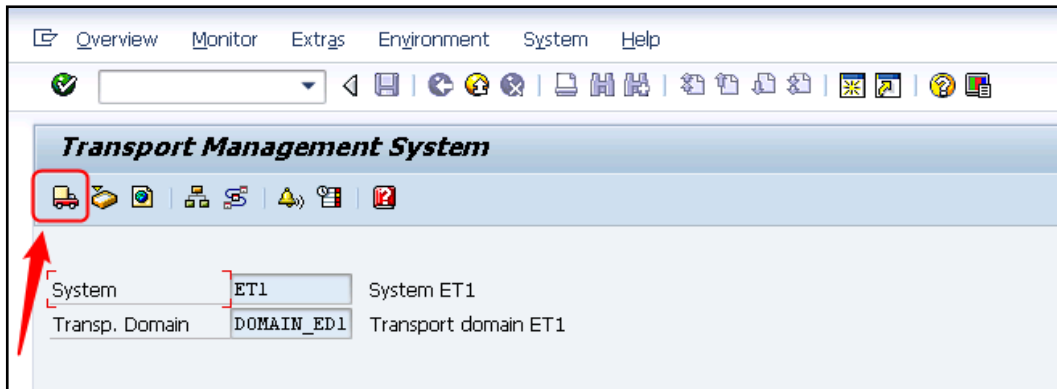
4. Click on the System you want to import the Transport files to.

5. Add the Transport to the queue by selecting **Extras** > **Other Requests** > **Add** from the top menu bar.

6. Enter the Transport file name: **ED1K900315** into the **Transp. Request** field.

7. Click the **Transport Request** button and select **Import Request**

8. Enter the target client to which you want to import the Transport and click **OK**.
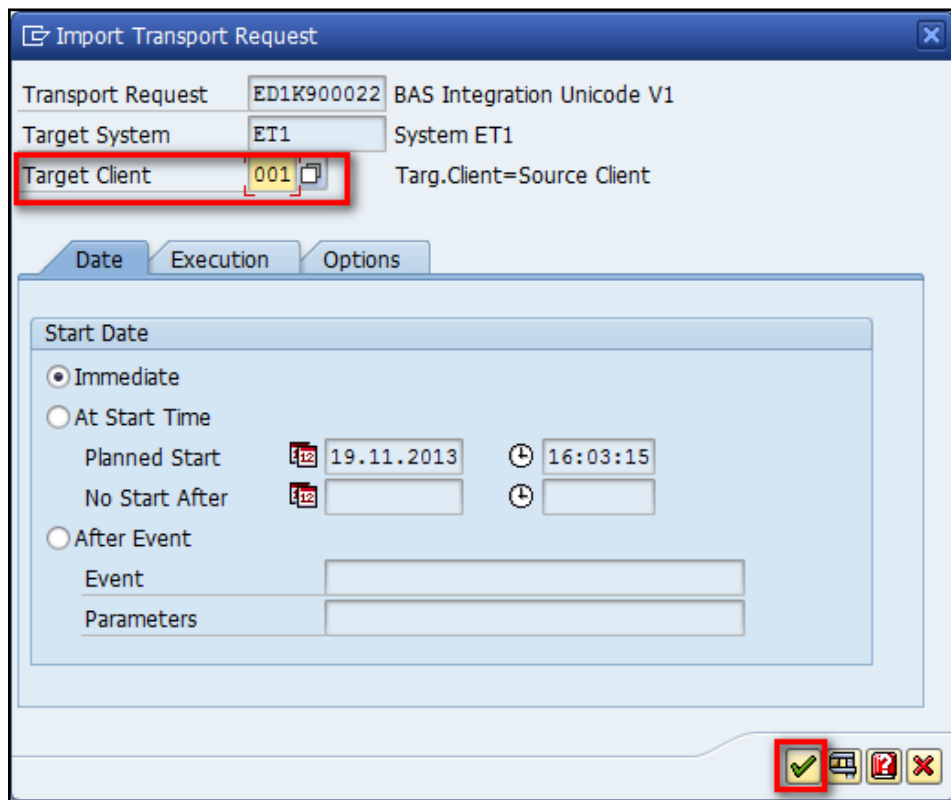
2.4 Create a new RFC connection

1. Enter the transaction code: **SM59**.

2. Select the **TCP/IP connections** folder and click **Create** (the button circled below).
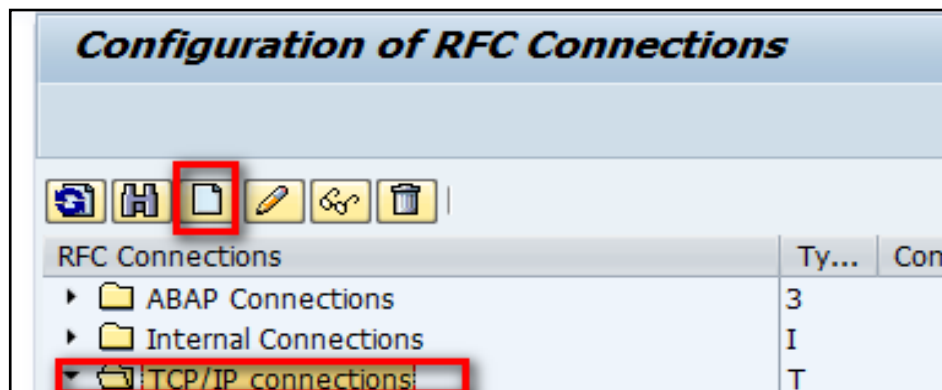
3. Create a new RFC connection description (example: 'PROWEB') and select the **Connection Type** as 'T'.

4. Under the **Technical Settings** tab, ensure the **Program ID** name matches the program ID value within the **qaspwc.exe** configuration file from the **Experian SAP Connector**, and that **Registered Server Program** is selected.

5. Save this connection by clicking the **Save** button.

6. Test the RFC connection by clicking on the **Connection Test** button in the top left-hand corner.

If the connection works, then the login is successful (as shown below).

Tip: Create additional RFC connections, if required, by repeating steps one to six mentioned above, using the **SM59** Transaction.
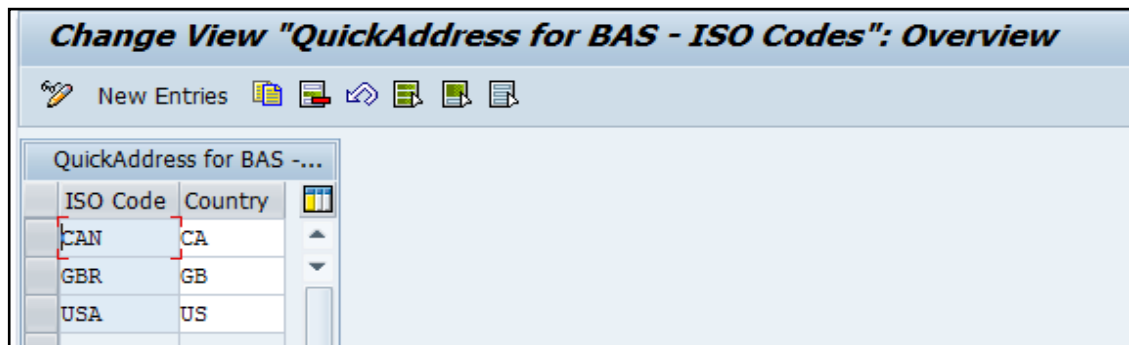
3 Configuration

3.1 Configure settings within SAP

1. Enter the transaction code: **/QAS/YQACT** to open the **QAS Configuration** screen.
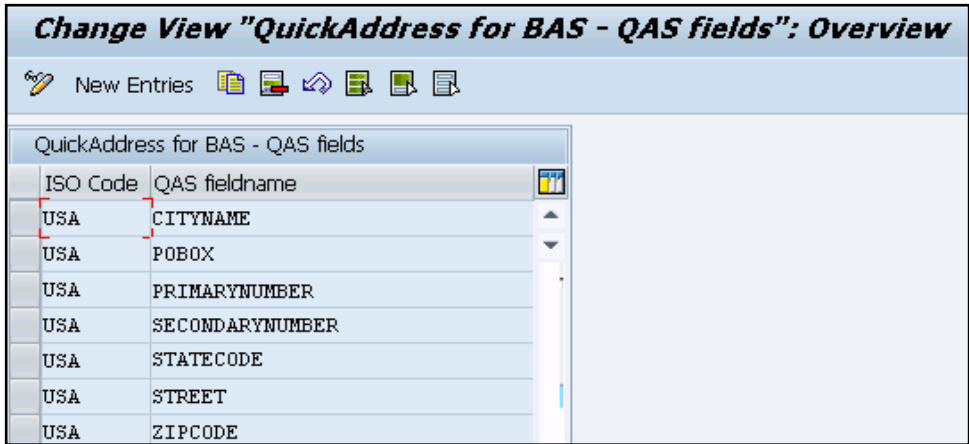2. Choose which settings you need to configure:

> **ISO CODES:**

Within this configuration, Experian's sample **ISO Code** and **Country** fields are automatically mapped.

1. Enter as many countries you require the address validation solution to work with.

> **FIELDS:**

Within this configuration, all output fields from your Experian service will be listed by their label names which were created during step 2.1.

Change View "QuickAddress for BAS - QAS fields": Overview

ISO Code	QAS fieldname
USA	CITYNAME
USA	POBOX
USA	PRIMARYNUMBER
USA	SECONDARYNUMBER
USA	STATECODE
USA	STREET
USA	ZIPCODE

SET UP:

1. Set up the mapping between the RFC Connection created earlier and the pertaining ISO Code.

TERM DESCRIPTIONS:

| Setting	Purpose	Default Value
ISO Code	Defines what country code to apply settings	USA
Active	Enables or disables address validation for the country	Yes
Engine Type	Sets the default EDQ engine	Typedown
RFC Destination	Name of the RFC destination set up during step 3.4	PROWEBEXT
QAS Layout	Name of the EDQ Layout to use, created during step 2.1	SAP
Timeout	This defines the time threshold in milliseconds after	150
FIELD MAPPING:		
Match Level	This setting defines how hard the search engine will work to obtain a match. Higher intensity values may yield more results than lower intensity values, but will also result in longer search times.	Close Searching
Trshold	This defines the threshold that is used to display potential results.	200
Prompt Set Type	This tells the EDQ engine what input data to expect for searching.	Default
Flatten	This defines whether the search results will be 'flattened' to a single picklist of deliverable results, or shown as (potentially multiple) hierarchical picklists of results that can be stepped into.	True

1. For each country, you can create a mapping between the **SAP CRM fieldname** and the corresponding **EDQ** field:

- **QAS fieldname**: the labels which were created during step 2.1.

Change View "QuickAddress for BAS - Field mapping": Overview

New Entries

QuickAddress for BAS - Field mapping

| ISO Code	SAP CRM fieldname	QAS fieldname	SAP BAS fieldname	Ext Popup Map
USA	City	CITYNAME	CITY1	3
USA	House number	PRIMARYNUMBER	HOUSE_NUM1	1
USA	City postal code	ZIPCODE	POST_CODE1	4
USA	Region (State, Province, Co…	STATECODE	REGION	5
USA	Street	STREET	STREET	2

- **SAP BAS fieldname**: where the returned data should be placed.

For each country, you can set up a search priority, as well as a format.

1. Set up address fields in a logical order for the country being configured. Example: a typical order for the USA is: **House Number, Street Name, Secondary Number, City, State and Zip Code.**

SEARCH FIELDS:

Change View "QuickAddress for BAS - Dialog search string construct": O

New Entries

QuickAddress for BAS - Dialog search string construct

ISO Code	SAP CRM fieldname	Priority
USA	City	3
USA	House number	1
USA	City postal code	5
USA	Region (State, Province, Co…	4
USA	Street	2

By default, Address Validation will be enabled for every area which uses BAS. If you need to disable validation on a certain Transaction, add it to the **List of Transactions for BAS Solution** list.
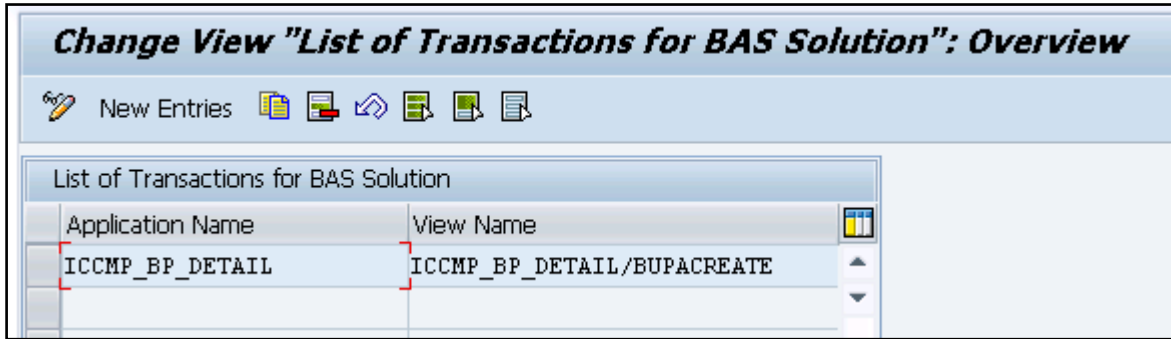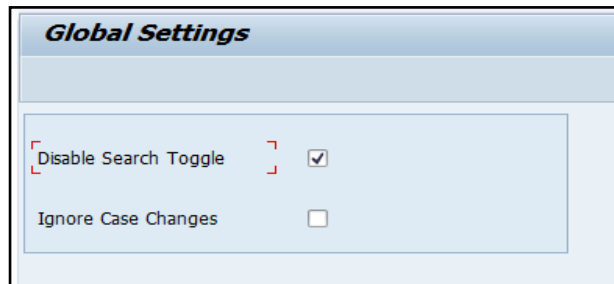
## COUNTRIES SUPPORTED SEARCH ENGINES:

You can define the search engines available in the external popup for a country by configuring the following options:

- **Disable Search Toggle**: Defines whether the end-user can change the search engine in the external popup or not.

- **Ignore Case Changes**: Disables the search functionality when an address has only been modified with a case change. Example: if a user changes `125 Summer St` to `125 Summer st`.
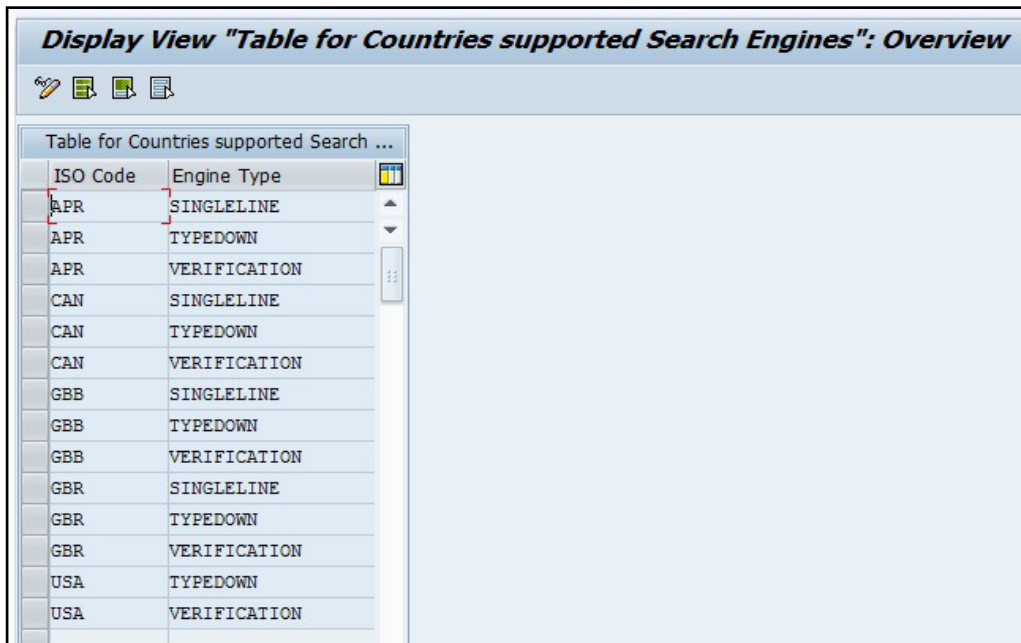
Global Settings
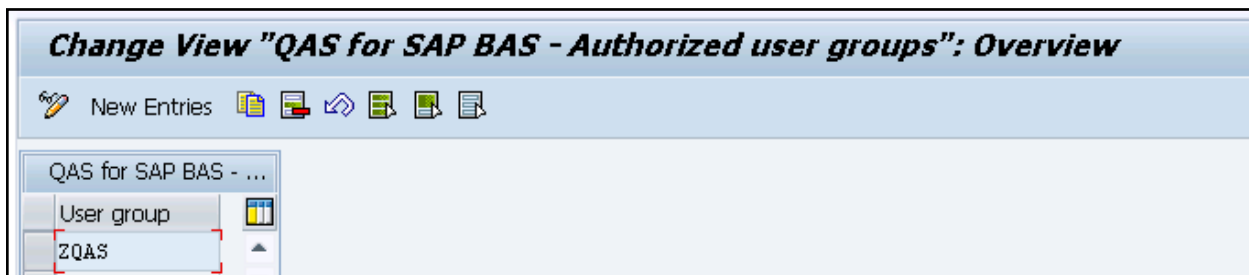
Disable Search Toggle ☑

Ignore Case Changes ☐

The address validation can be limited to certain users by maintaining an SAP user group.

Change View "QAS for SAP BAS – Authorized user groups": Overview

New Entries

QAS for SAP BAS - ...

User group	
ZQAS	

3.2 Check for Active Enhancement Set Assignment

Verify if an active Enhancement Set Assignment exists for the working client in the system:

1. Enter the transaction code: **SM34**.

2. Enter the Table/View as **BSPWDV_EHSET_ASG** and click **Maintain**. Maintain
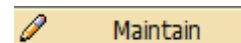
There are two possible scenarios based on the Enhancement set Assignment:

In this case, the Enhancement set **/QAS/CRMBAS1** (created by **EDQ Workbench Transport** request) needs to be assigned to the working client. Below are the steps.

1. Enter the transaction code: **SM34**.

2. Enter the Table/View as **BSPWDV_EHSET_ASG** and click **Maintain**.

3. Enter the following details:

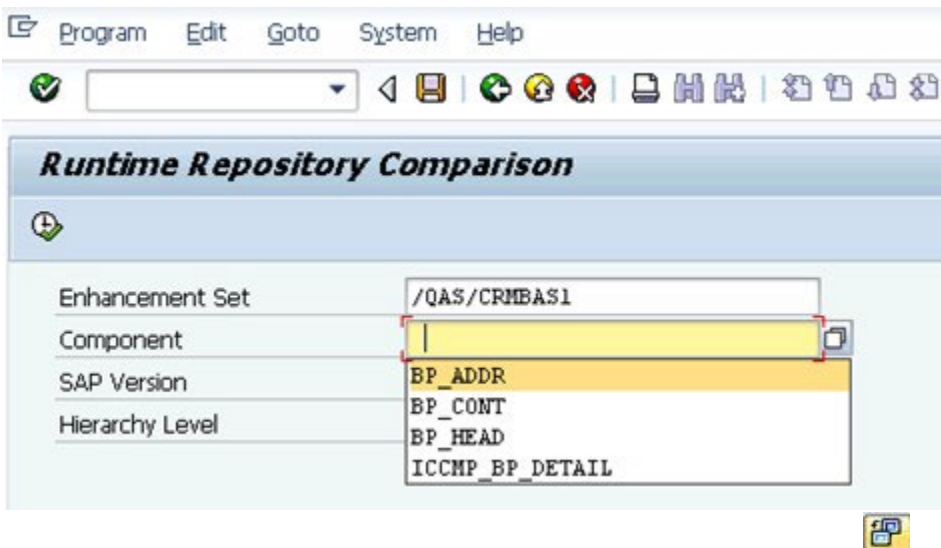   - **Assignment No.**: [Any three-digit number]

   - **Client**: [Client's SAP CRM system number]

   - **Enhancement Set**: **/QAS/CRMBAS1**
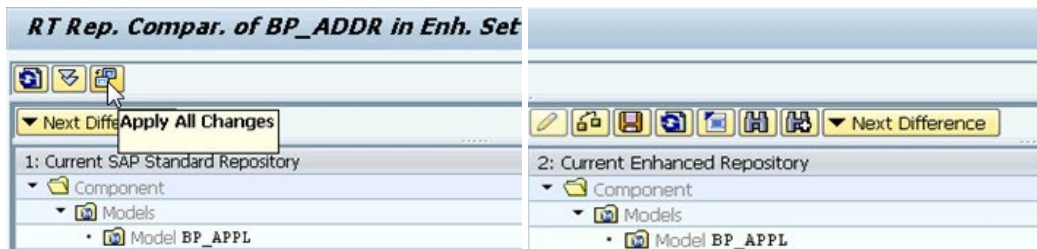

4. Save the entry/changes into a Customsing Request.

5. Execute the **BSP_WD_RT_REP_COMPARE** program for the **/QAS/CRMBAS1 / Component [BP_ADDR, BP_CONT, BP_HEAD, ICCMP_BP_DETAIL]** Enhancement Set combinations.

6. For each execution, a list is displayed in the split-screen editor. Click **Apply All Changes** to copy all of the **Current SAP Standard Repository** file contents to the

Current Enhanced Repository file.

If an Enhancement Set Assignment already for the working client, follow the steps below.

Enhancing the BP_ADDR/STANDARDADDRESS view:

1. Enter the transaction code: **BSP_WD_CMPWB**.

2. Set the Component name and Enhancement Set name as **BP_ADDR & /QAS/CRMBAS1** and click **Display**. The below screen will appear.
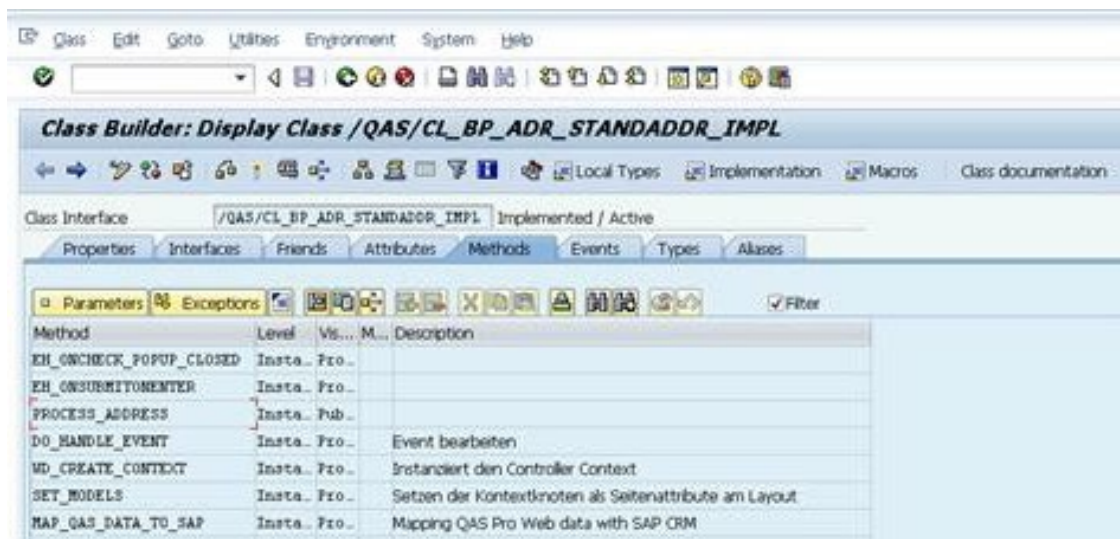
3. Double click on the **BP_ADDR/StandardAddress** view.

4. Double click on the **Implementation** class.

5. List out the methods that are created/modified in the **Implementation** class by selecting the **Filter** checkbox.

19

6. Open another session and enter the transaction code: **BSP_WD_CMPWB**.

7. Change the component name to **BP_ADDR** and select the Active Enhancement Set which has been defined by the Customer and click on **Display**.

8. Go to the **BP_ADDR/StandardAddress** view. Enhance the view yourself if it is not already.

9. Go to the **Implementation** class of the **BP_ADDR/StandardAddress** view.

10. Compare the methods (in which the code changes are made by EDQ) in both **Implementation** classes and replicate the code changes to the current **Implementation** class methods (which are in the Enhancement Set defined by the Customer).

Enhancing the BP_CONT/BPCONTOVERVIEW view:

1. Enter the transaction code: **BSP_WD_CMPWB**.

2. Give the **Component** name and **Enhancement Set** name as **BP_CONT** & **/QAS/CRMBAS1** and click **Display**.

3. Double click on the **BP_CONT/BPCONTOverview** view.

4. Double click on the view's **Implementation** class. List out the methods which are created/modified in the class by selecting the **Filter** checkbox.

5. Open another session and enter the transaction code: **BSP_WD_CMPWB**.

6. Set the **Component name** to **BP_CONT** and select the **Active Enhancement** set which has been defined by **Customer** and click **Display**.

7. Go to the **BP_CONT/BPCONTOverview** view. Enhance the view yourself if it is not already.

8. Go to the **Implementation** class of this view.

9. Compare the methods (in which the code changes are made by Experian) in both **Implementation** classes, and replicate code changes to the current **Implementation** class methods (which are in **Enhancement Set**, defined by **Customer**).

1. Enter the transaction code: **BSP_WD_CMPWB**.

2. Set the **Component** name and **Enhancement Set** name as **ICCMP_BP_DETAIL** & **/QAS/CRMBAS1** and click **Display**.

3. Double click on the **ICCMP_BP_DETAIL/BuPaCreate** view.

4. Double click on the view's implementation class. List out the methods which are created or modified in the class by selecting the **Filter** checkbox.

5. Open another session and enter the transaction code: **BSP_WD_CMPWB**.

6. Set the **Component name** as **ICCMP_BP_DETAIL** and select the **Active Enhancement** set which has been defined by **Customer** and click **Display**.

7. Go to the **ICCMP_BP_DETAIL/BuPaCreate** view. Enhance the view yourself if it is not already.

8. Go to the **Implementation class** of this view.

9. Compare the methods (in which the code changes are made by Experian) in both **Implementation** classes, and replicate code changes to the current **Implementation** class methods (which are in **Enhancement Set**, defined by **Customer**).

4 Testing

1. Launch the SAP CRM web client.

2. Create a new contact by navigating to **Account Management** > **Contacts** > **New**.

3. Enter the data you have available into any fields and press **Enter**. EDQ will invoke if it is configured correctly.

Main Address and Communication Data			
House Number/Street	1664	Fyler Rd Lot 1	
City			
District			
State/ZIP Code	NY		
Country	US		USA

4. Click the **Accept New Address** button.
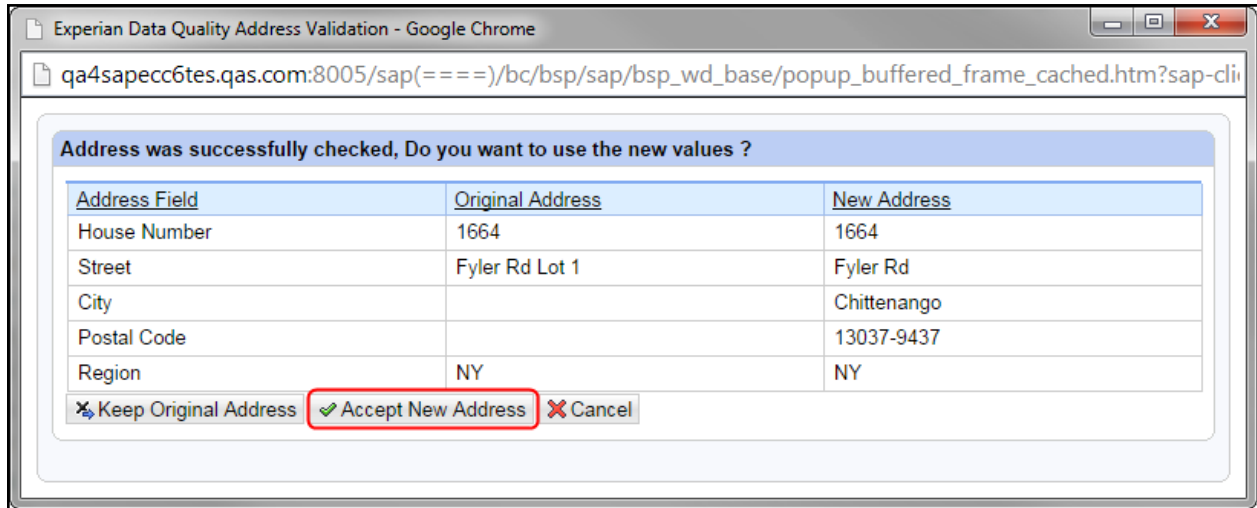
5. The final, complete address will then be returned to the screen.

5 Maintain the integration

For Pro Web (on-premises data) all address data supplied by Experian has a built-in expiry date to ensure that only the most up-to-date address data is used. If the Experian interface detects the data has expired, that country will

no longer be shown in the drop-down list in the search form.

The United Kingdom dataset expires eight months after creation, the United States dataset expires every 120 days, and the Canadian dataset expires every 365 days. For more information on this, please refer to the accompanying data guide.

To update data, follow the corresponding data guide and product documentation. For assistance, and to obtain new data files, please contact our Support team.

For Pro On-Demand (SaaS) purchases the token will expire at the end of your contract period, unless renewed.

There are no on-premises data installations updates needed.

Visit the Support page here for more assistance.

We hope this guide was useful to you. For further support, or to leave us feedback, please get in touch with your Professional Services Consultant, or our Support team.