

Experian Data Validation for SAP CRM 7

Installation, Integration and Configuration Guide



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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.
- Once the Pro Web service has started, navigate to Start > QAS Pro Web 7.25 (or 7.15) > Test Harness.
- 10. Enter #a 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 Layouts Availabl 0 - < QAS stand 1 - < Default > 2 - Database la 3 - SAP	e: ard layout > - D - D yout - U	Default Uiew Default Uiew Inited States of America 7-line fixed format Default Uiew
Layout is set to	: < QAS standard	layout >
<mark>Enter command or</mark> Layout is set to		
	<mark>search: 1 river</mark> d, Schenectady NY	rd ¦ new york ¦ ny ¦ 12345 12345-6000 100%
0	C 1 1 1	
Auto-formatting	first item	
Huto-formatting Content	first item Label	Address Line
Content Address Address Address Address Address Address Address		Address Line 1 River Rd Schenectady 12345-6000 NY

If you have chosen the hosted Experian solution, Pro OnDemand for hosted datasets, then the <u>authentication tokens</u> you will have been given upon purchasing these products must be activated and <u>layouts chosen</u> 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.
- 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.

• For Pro Web: Edit the com.gas.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).

🔄 Overview M	onitor Extr <u>a</u> s En <u>v</u> ironment System <u>H</u> elp
8	▼ 4 🔲 🛠 🥸 😫 💾 🛗 🖓 🖆 🖓 🔛 🔻
Transport	Management System
🔒 🍳 🖻 i 🖧	, 🔊 🗛 🎬 😰
System	ET1 System ET1
Transp. Domain	DOMAIN_ED1 Transport domain ET1

- 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**.

문 Import Transport Request	X
Transport Request ED1K900022 BAS Integration Unicode V1 Target System ET1 System ET1 Target Client 001 Targ.Client=Source Client	
Date Execution Options Start Date Immediate At Start Time Planned Start Immediate OAt Start After Immediate After Event Event Parameters	
	×

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).

Configuration of RFC Connections	ङ
3 H D 🖉 🚱 🔂	
RFC Connections	Ty Con
 ABAP Connections 	3
 Internal Connections 	I
TCP/IP connections	Т

- 3. Create a new RFC connection description (example: 'PROWEB') and select the **Connection Type** as 'T'.
- 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 lefthand corner.

RF(RFC De	stinat	tion F	PROW	/EB							
Conr	Connection	1 Test	Unicod	e Test	°9							
RFC Coni Descrip	RFC Destin Connection			PROWEB TCP/IP C) Connectio	on		Descrip	tion			
	ription 1 ription 2											
Descr	ription 3											
_	ription 3 dministration	Techni	ical Sett	tings	Logon 8	& Security	Unicode	Special	Options]		
Ad		Techni	ical Sett	tings	Logon 8	& Security	Unicode	Special	Options]		
Ad	dministration			tings	_		Unicode ed Server Pre		Options]		
Ad Activa	dministration ration Type	cation Ser		tings	_				Options]		
Activa OS OS	dministration ration Type Start on Applic	cation Ser it Host	ver		_				Options]		
Activa OS OS	dministration ration Type Start on Applic Start on Explic	cation Ser it Host :-End Wor	ver k Statio		_				Options			

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

RFC - Connection Test							
Action	Result						
Logon	128 msec						
Transfer of 0 KB	2 msec						
Transfer of 10 KB	3 msec						
Transfer of 20 KB	4 msec						
Transfer of 30 KB	5 msec						



<u>Tip</u>: 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
🌮 New Er	ntries 📋 🚘 🛷 鶝 🖪	
QuickAddre	ss for BAS - QAS fields	
ISO Code	QAS fieldname	T T
USA	CITYNAME	A
USA	POBOX	•
USA	PRIMARYNUMBER	1
USA	SECONDARYNUMBER	
USA	STATECODE	
USA	STREET	1
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
Timeaut	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							
9	🞾 New Entries 📫 🚘 🗠 🔜 🖳							
	QuickAddre	ss for BAS - Field mapping						
	ISO Code	SAP CRM fieldname	QAS fieldname	SAP BAS fieldname	Ext Popup Map			
	USA	City 🔻	CITYNAME	CITYL	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:

С	hange	View "QuickAddress fo	<i>r</i> 1	BAS - L	Diald
64	🦻 New Er	itries 咱 🚘 🖒 🛃 🖪			
	QuickAddre	ss for BAS - Dialog search string cons	stru	uct	
	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.

Change View "List of Transactions for BAS Solution": Overview							
🞾 New Entries 🗎 🖾	💖 New Entries 咱 🚘 🖒 🗮 🖳						
List of Transactions for BAS Solu	ution						
Application Name	View Name						
ICCMP_BP_DETAIL	ICCMP_BP_DETAIL/BUPACREATE	A					
		*					

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.

Display	View "Table fo	or Countries supported Search Engines": Overv	ie
	B		
Table for Co	untries supported Sea	arch	
ISO Code	Engine Type		
APR	SINGLELINE		
APR	TYPEDOWN	•	
APR	VERIFICATION		
CAN	SINGLELINE		
CAN	TYPEDOWN		
CAN	VERIFICATION		
GBB	SINGLELINE		
GBB	TYPEDOWN		
GBB	VERIFICATION		
GBR	SINGLELINE		
GBR	TYPEDOWN		
GBR	VERIFICATION		
USA	TYPEDOWN		
USA	VERIFICATION		

GLOBAL SETTINGS:

Global Settings	7
Disable Search Toggle] 🗸
Ignore Case Changes	

USER GROUPS:

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 III 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:

SENARIO 1: NO EXISTING 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

Display View	v "Maintenance Vie	ew for Enhancement Set Assignments": Detai
988		
Assignment No.	100	
Assignment Definitio	m	
Client	001	SAP AG Konzern
Enhancement Set	/QAS/CRMBAS1	Enhancementset for CRM BAS solution New

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

🔄 Program Edit Goto	System Help
Ø -	3 8 8 8 8 8 8 8 9 9 8 9 8 9 8 8
Runtime Repositor	y Comparison
Φ	
Enhancement Set	/QAS/CRMBAS1
Component	
SAP Version	BP_ADDR
Hierarchy Level	BP_CONT BP_HEAD ICCMP_BP_DETAIL
	 P

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.

RT Rep. Compar. of BP_ADDR in Enh. Set	
<u>1</u> 77	
▼ Next DiffeApply All Changes	Next Difference
1: Current SAP Standard Repository	2: Current Enhanced Repository
🝷 🔂 Component	 Component
 Models 	Models
• 🔯 Model BP_APPL	• 🔯 Model BP_APPL

SENARIO 2: AN ENHANCEMENT SET ASSIGNMENT ESISTS

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**.
- Set the Component name and Enhancement Set name as BP_ADDR & /QAS/CRMBAS1 and click Display. The below screen will appear.

P Glass Edit Goto U	jtäties Engronn	nenit System Help
0	- 4 - 0	ଡେଇ) 🛱 🕅 🕅 ଅପରିଥି 🖾 🖾 👘 📾
Class Builder: Disp	olay Class / (QAS/CL_BP_ADR_STANDADDR_IMPL
* * > > 28 28 60	1 @ + A	🖁 🕮 🐺 🚹 🛷 🔄 Local Types 🔗 Implementation 🖓 Macros 🛛 Class documentation
Jass Interface	AS/CL_BP_ADR_ST	TAIDADOR_INFL Implemented / Active
Properties Interfaces	Friends	Attributes Methods Events Types Allases
CONTRACTOR C		
Method	Level Vis N	
Method EH_ONCHECK_POPUP_CLOSED	Level VsN Insta.Pro.	
Method EH_ONCHECK_POPUP_CLOSED EH_ONSUBELITONENTER	Level Vs N Insta. Pro. Insta. Pro.	
Method EH_ONCHECK_POPUP_CLOSED EH_ONSUBBLITONEMTER	Level VsN Insta.Pro.	
Method EH_GNCHECK_POPUP_CLOSED EH_GNSUBHITONENTER PROCESS_ADDRESS	Level Vs N Insta. Pro. Insta. Pro.	
Method	Level VsN Insta.Fro. Insta.Fro. Insta.Pub.	4., Description
Method EH_ONCHECK_POPUP_CLOSED EH_ONSUEHITONENTER PROCESS_ADDRESS DO_HANDLE_EVENT	Level Vs N) Insta. Fro. Insta. Fro. Insta. Pub. Insta. Fro.	K., Description

- 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.

- 6. Open another session and enter the transaction code: **BSP_WD_CMPWB**.
- 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.
- 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**.
- 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**.
- 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.
- 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**.
- 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**.
- 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.
- 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.
- 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	t 1664 Fyler Rd Lot 1					
City						
District	t					
State/ZIP Code	NY 🗇					
Country	US 🗇 USA					

4. Click the Accept New Address button.

a+supeccores.qus.com.oo	00/30p(===)/bc/b3p/30p/b3p_w	d_base/popup_buffered_frame_cached.htm?s
ddress was successfully ch	ecked, Do you want to use the new val	ues ?
Address Field	Original Address	New Address
House Number	1664	1664
Street	Fyler Rd Lot 1	Fyler Rd
City		Chittenango
Postal Code		13037-9437
Region	NY	NY
🗞 Keep Original Address 🛷	Accept New Address 🗙 Cancel	

5. The final, complete address will then be returned to the screen.

Main Address and Communication Data					
House Number/Street	1664	Fyler Rd			
City	Chittenango				
District					
State/ZIP Code	NY	ð	13037-9437		
Country	US	đ	USA		

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 <u>here</u> 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 <u>Support team</u>.