

# SAP CRM - WEB UI CONFIGURATION

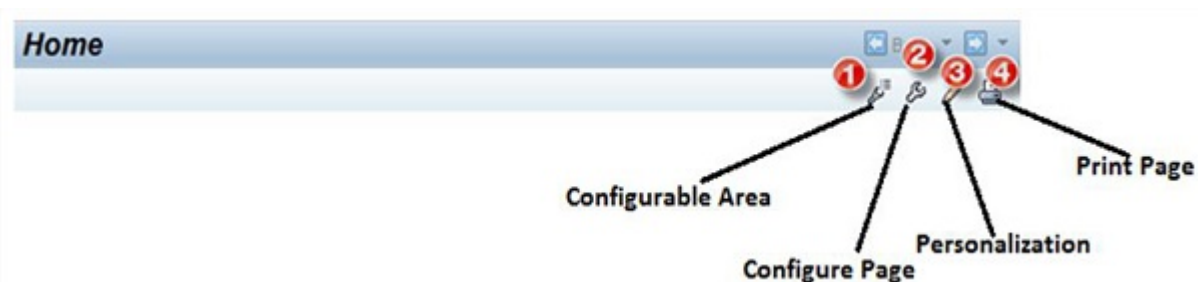
## Advertisements

To perform the enhancements in the SAP SRM WebClient, you can use Web UI configuration and application enhancement tools. These tools allow you to add new fields, change layout, add tables, etc. to the existing applications.

In any general scenario, companies don't prefer to use standard applications and some customizations are required. The following tools can be used –

- Web UI Configuration Tool
- Application Enhancement Tool

In a SAP CRM WebClient, there is an option to access Web UI configuration tool as per the authorization. There are predefined roles to which these buttons are available. To make any changes to the WebClient configuration and customization, a user must have sufficient privilege.



**Configurable Area** – This option is used to highlight the area on the page which is configurable.

**Configure Page** – This option allows you to view pop ups that are used to configure a page.

**Personalization** – Personalization is performed by end users and configuration is done by administrators, project teams. It is used to change the layout of the tool for individual users and not for a group of users. To perform personalization, a personalization dialog is used with which a user can adapt the UI of the application.

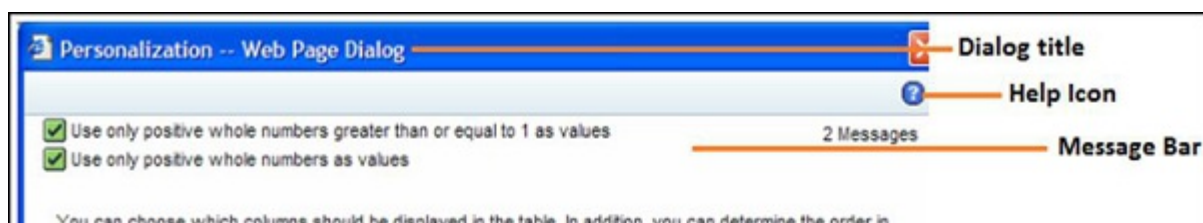
*Note – Most of the dialogs to perform personalization are created generically and their structure can't be altered.*

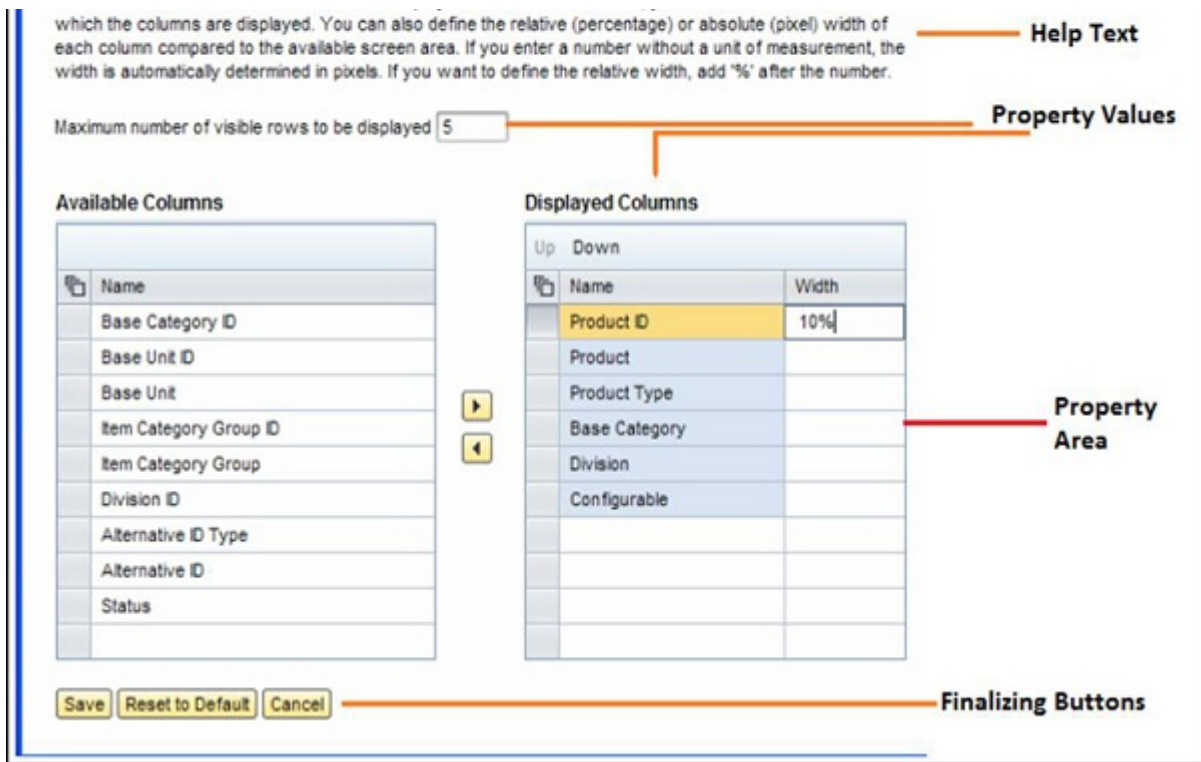
You can also create application specific dialogs to change the structure of dialog to some extent but SAP recommends that you should use the same dialog structure as for the standard dialogs.

## Structure of a Personalized Dialog box

A Personalization dialog box contains the following components –

- Dialog Title
- Message Bar
- Help Icon and Help text
- Property group
- Property Values
- Finalizing Buttons





When a user makes changes to this personalization dialog box, he can use the following finalizing options to execute.

- **Reset to Default** – This option is used to set the property value back to the default value of the application. This function has to be offered for each property in order to avoid data loss on properties for which the user did not want to reset to the default.

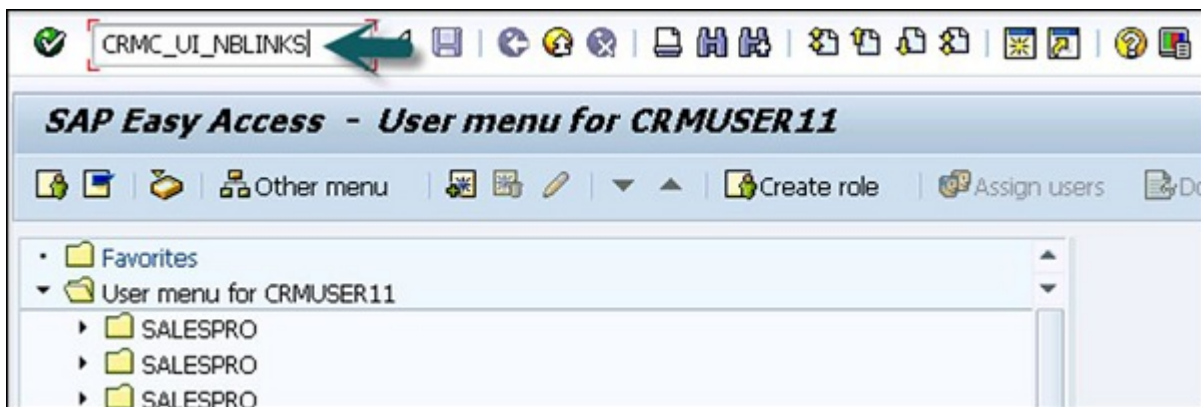
If the dialog is not very complex, this button can also be placed in the button row of the finalization buttons.

- **Save** – This option is used to save the changes and to close the dialog box.
- **Cancel** – This option is used to close the current personalization dialog and navigating back to the previous page or closing the dialog box without saving any changes.

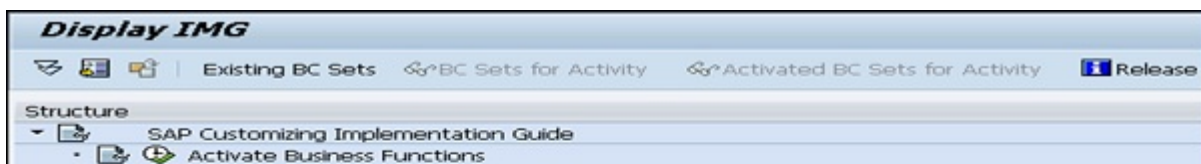
## Configuration of the Navigation Bar

When a user logs-in to the WebClient, on the left side they can see the Navigation bar profile.

To customize the Navigation bar, use **T-Code: CRMC\_UI\_NBLINKS**



Go to **SPRO** → **IMG** → **Customer Relationship Management** → **UI Framework** → **Technical Role Definition** → **Define Navigation Bar Profile** → **Execute**





All the options in the right window shows the already created Navigation bar profiles. You can see the description and the Link Id for each profile.

**Change View "Define Profile": Overview**

Dialog Structure

- Define Logical Links
- Define Work Center Link
  - Assign Links
- Define Work Center
  - Assign Groups
- Define Direct Link Group
  - Assign Links
- Define Profile**
  - Assign Work Centers
  - Assign Direct Link Gr
  - Assign Components
    - Define Specific O
  - Define Generic OP M
  - Override Generic OP

Nav Bar Profile	Description	Link ID
ANALYTICSPRO	Analytics Professional	ANA-REP-WC
ARGR_NAVBAR	ARGR_NAVBAR	SLS-HOM-WC
AUT-PARTNERMANAGER	Automotive Partner Manager	CHP-HOM-WC
CHM-CHANNELMANAGER	Channel Manager	CHM-HOM-WC
CHM-PARTNERMANAGER	Partner Manager	CHP-HOM-WC
CLA-PRO	Trade Claims Professional	TPM-HOM-WC
CRM_GRM_PROGRAM_MANAGER	Grantor Program Manager	GRM-GRM-WC
CRM_MASTER_PROFILE_ALL	Master Profile for all links of all applications p...	
ECO-MANAGER	Web Channel Manager	ECO-HOM-WC
ETC-IC	Electronic Toll Collect: Interaction Center A...	IC_BPIDENT
FCC	Financial Customer Care	IC_BPIDENT

Go to Define Logical links option first in the menu. This shows the already defined logical links.

**Change View "Define Logical Links": Overview**

Dialog Structure

- Define Logical Links**
- Define Work Center Link
  - Assign Links
- Define Work Center
  - Assign Groups
- Define Direct Link Group
  - Assign Links
- Define Profile
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LogLink ID	Type	Target ID	Parameter	Parameter Class	Icon Name
AMA-DAS-WC	Work Center	WCCANADASH		CL_CRM_DASH_NAV_UTIL	
AMA-DASH-C	Link	DASHB_CREA		CL_CRM_DASH_NAV_UTIL	
AMA-DASH-S	Link	DASHB_SRCH		CL_CRM_DASH_NAV_UTIL	
AMA-SEP-AL	Link	FROMALLRPT			
AMA-SEP-AP	Link	FROMNAVBAR			
AMA-SEP-WC	Work Center	WCCANAREP	REPORT_HOME_PAGE		
ARGR_LOGIC	Link	MD-OPEN-CR			
AXT-SEARCH	Link	AXT_SEARCH			
AXT_SEARCH	Link	AXT_SEARCH			
A_CHM_PP01	BI Report	DISPLAY	ACRM_TPLB_CHM_PP_01	CL_CRM_GEN_UI_BI_UTIL	GC_ICON_REPORTS
A_CHM_PP02	BI Report	DISPLAY	ACRM_TPLB_CHM_PP_02	CL_CRM_GEN_UI_BI_UTIL	GC_ICON_REPORTS
A_CHM_PP03	BI Report	DISPLAY	ACRM_TPLB_CHM_PP_03	CL_CRM_GEN_UI_BI_UTIL	GC_ICON_REPORTS

This is how they look in the WebClient –



To customize the Navigation bar profile, go to Define Navigation bar profile as mentioned in one of the above images.





Nav Bar Profile	Description	Link ID
ANALYTICSPRO	Analytics Professional	ANA-REP-WC
ARGR_NAVBAR	ARGR_NAVBAR	SLS-HOM-WC
AUT-PARTNERMANAGER	Automotive Partner Manager	CHP-HOM-WC
CHM-CHANNELMANAGER	Channel Manager	CHM-HOM-WC
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In the next window, change the Navigation bar profile name and press enter. Then in the next window, copy all the entries and click the Save option at the top. The next step will be to assign this navigation bar profile to a Business role.

**Change View "Define Business Roles": Details**

Business Role: ZSERCLIENT

Define Business Roles	Profile Type	Description	Role Config. Key	Nav Bar Profile
	CRM WebClient Bus	WEBCLIENT service		ZSPNAVBAR

To save the profile, go to transaction **CRMC\_UL\_Profile**.

**Change View "Define Business Roles": Overview**

Business Role	Type	Description	Config Key	Nav Bar Profile	Layout Profile	Technical Profile
ANALYTICSPRO	CRM WebClient Business Role	Analytics Professional	CRM_ANAPRO	ANALYTICSPRO	CRM_UIU_MASTER_ANA	DEFAULT
AUT-PM	CRM WebClient Business Role	Automotive Partner Manager	PARTMAN	AUT-PARTNERMANAGER	CRM_UIU_MASTER	DEFAULT
CASEWORKER	No Classification	Case Worker (Social Services)	<f>	SOCIAL_SERVICES	CRM_UIU_MASTER	DEFAULT
CHM-CH	No Classification	Channel Manager	CHAMMAN	CHM-CHANNELMANAGER	CRM_UIU_MASTER	DEFAULT
CHM-PM	No Classification	Partner Manager	PARTMAN	CHM-PARTNERMANAGER	CRM_UIU_MASTER	DEFAULT_CHM
CRMGRMPROGMAN	No Classification	Grantor Program Manager	<f>	CRM_GRM_PROGRAM_MANAGER	CRM_UIU_MASTER	DEFAULT
DETECTIVE	CRM WebClient Business Role	Detective	ICR	INVESTIGATIVE_CASE	CRM_UIU_MASTER	DEFAULT_ICR
ECO-MANAGER	No Classification	Web Channel Manager	<f>	ECO-MANAGER	CRM_UIU_MASTER	DEFAULT