

Proof of Concept on Sending Emails using Actions

Applies to: SAP 5.0

Summary

This is a POC in which emails are triggered by the using Actions. The objective behind this document is to consolidate all the pieces of information which are scattered all across and put that as part of a single consolidated document so that it's a starting point to System Analysts who want to work in this space.

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Author Bio



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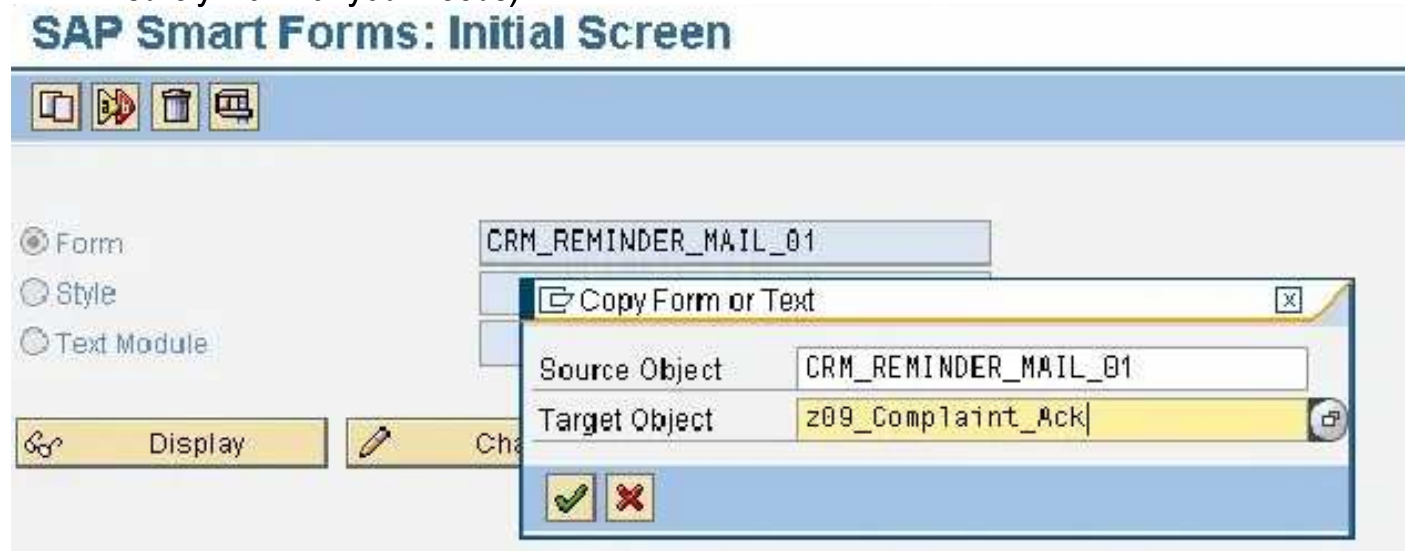
Objective

To send emails to a customer using the Actions. The scenario which I have taken up for this POC is the consumer creates a complaint (Transaction = CRMC) and once the complaint is created an email should be triggered to the customer saying that the complaint has been registered. In this case we are triggering an email to the Biz Partner only if they have a partner function role of "Customer". Hence we are achieving this using an Action attached to our transaction type CRMC (Complaint).

Prerequisites – Smartform creation.

Though not a required step for this POC as you can use the existing smartform. I leave this up to the user to choose.

1. Go to the transaction SMARTFORMS.
2. Click on the Button Copy As.
3. Enter Source and Destination as given in the figure. (Note: I chose this form as in some of the examples, I came across this being used in their examples. Need to explore more on this. But this will surely work for your needs)



4. Expand the left hand tree structure Pages and Windows→First→Main→MailContent
5. Define your template here.
6. Save the Template and DO NOT FORGET TO ACTIVATE IT.

Procedure

1. Go to the Transaction SPRO and choose IMG→Customer Relationship Management→Basic Function→Actions→Actions in Transactions→Change Actions and Conditions→Define Actions Profiles and Actions.
2. Click on Change/Display Button and click on New Entries. Enter the following Data.

Dialog Structure

- Action Profile
- Action Definition
- Processing Type

Action Profile: z09_COMPLAINT Common Profile

Description: Z09_COMPLAINT Profile

Action Profile

Object Type

Category of Object Type: Business Object Repository Persistent Class

Object Type Name: BUS2000120

Date Profile: []

Used Common Profile: []

Context Class: CL_DOC_CONTEXT_CRM_ORDER

Note: I got the Object Type Name and Context Class from the SAP provided Action Profile called "Complaint"

3. Click on Action Definition. Click on New Entries and enter the following data.

Dialog Structure

- Action Profile
- Action Definition
- Processing Type

Action Profile: z09_COMPLAINT

Description: Z09_COMPLAINT Profile

Action Definition: z09_EMAIL_ACKNOWLEDGEMENT

Description: Send Email when a person registers complaints

Action Definition Action Description

Action Settings

Processing Time: Processing when saving document

Processing Times Not Permitted: No Restrictions

Sort Order For Display: []

Schedules Automatically Changeable in Dialog

Delete After Processing Executable in Dialog

Display in Toolbox

Partner Determination for the Action

Partner-Dependent PartnerFunction: 00000037 Description: Customer

Action Determination and Action Merging

Determination Technology: Determination Using Conditions that Can Be Transported

Rule Type: Workflow Conditions

Action Merging: Max. 1 Action for Each Action Definition

Sort Fields for the Execution of Actions

Sort Field 1: []

Note 1: If the indicator "Changeable is Dialog" is not set, actions of this action definition can no longer be manually changed after automatic determination.

Note 2: If the indicator "Executable is Dialog" is not set, actions of this action definition can only be executed automatically, either immediately after scheduling or later using a selection report.

Note 3: Partner Function as "Customer" when you want partner determination to happen and to send emails to all the partner functions who satisfy this function "Customer". [Click on this link as how did I](#)

[come to the conclusion that Partner Function = 0000037](#) especially when there are so many with the same description Customer.

4. Click on Action Description and give an appropriate Description.
5. Click on Processing Types. Enter the following Details as shown in the figure.

The screenshot shows the SAP Action Definition dialog box for the action 'Z09_EMAIL_ACKNOWLEDGEMENT'. The 'Description' field contains 'Send Email when a person registers complaints'. The 'Permitted Processing Types of Action' table is as follows:

Processing Type	Default	Selection
Assignment/Change Using Value Help in List	Default	<input checked="" type="checkbox"/>
Smart Forms Mail		<input type="checkbox"/>

Below the table is a 'Set Processing' button. The 'Mail Settings' section is configured as follows:

Form Name	Z09_COMPLAINT_ACK
Processing Class	CL_DOC_PROCESSING_CRM_ORDER
Processing Method	CRM_ORDER_EXEC_SMART_FORM
Archive Mode	Mail Only

Note: If you Do NOT have a Smart Form configured then use the one provided by SAP and its called CRM_Reminder_Mail_01. For Smart Form Creation click on this link [How to Create a Smart Form](#)

6. Now let us define the Actions and the Conditions. Enter the transaction code sppfcadm.
 - Choose CRM_ORDER. Click on Condition Configuration (Transportable Conditions).
 - Click on Technical Names.
 - Choose the Action Profile which we created in the above steps called Z09_Complaint. Double on the Z09_Complaint. Click on Display/Change Button.

The screenshot shows the 'Conditions for Actions: Change' dialog box. The 'Scheduling of Actions' table is as follows:

Action	Numb
WEBALIC_ORDER_CONFIG	1
WEBREQ_PC_SIGNATURE	1
Y1_OPPORTUNITY_SALES	14
YIM_COMPLAINT_ITEM	0
YSSACTION1	2
Y_ACTIVITY	1
Y_AP_INTEL_DREG	3
Y_ORDER_MESSAGES	1
Z09_COMPLAINT	0

The 'Z09_COMPLAINT' row is selected. A red arrow points to the 'Send Email when a person registers comp!' button, with the text 'Click This and then choose the option below'.

- Click on Start Conditions Tab. Click on Edit Conditions Button and follow the steps in Figure.

Create Parameter Condition

Name: Z09 Email Complaint Ack

Interface

Object Type: BOR Object Type | BUG2000120

Date Profile:

Parameters

Parameter Definition: Create

Condition Definition

Click here to create a new condition [Click This.](#)

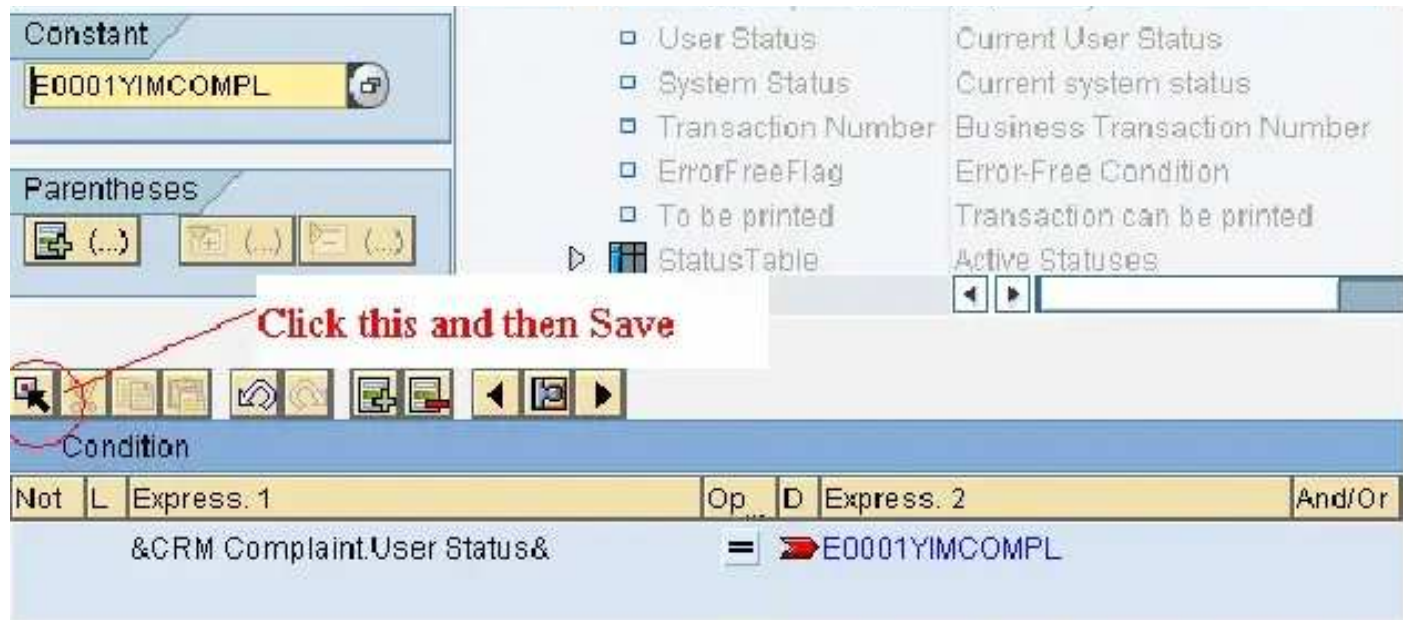
- Now Expand the CRM Complaint tree as shown in the figure and double click User Status. Click on Operator Button “=”.

Change Condition

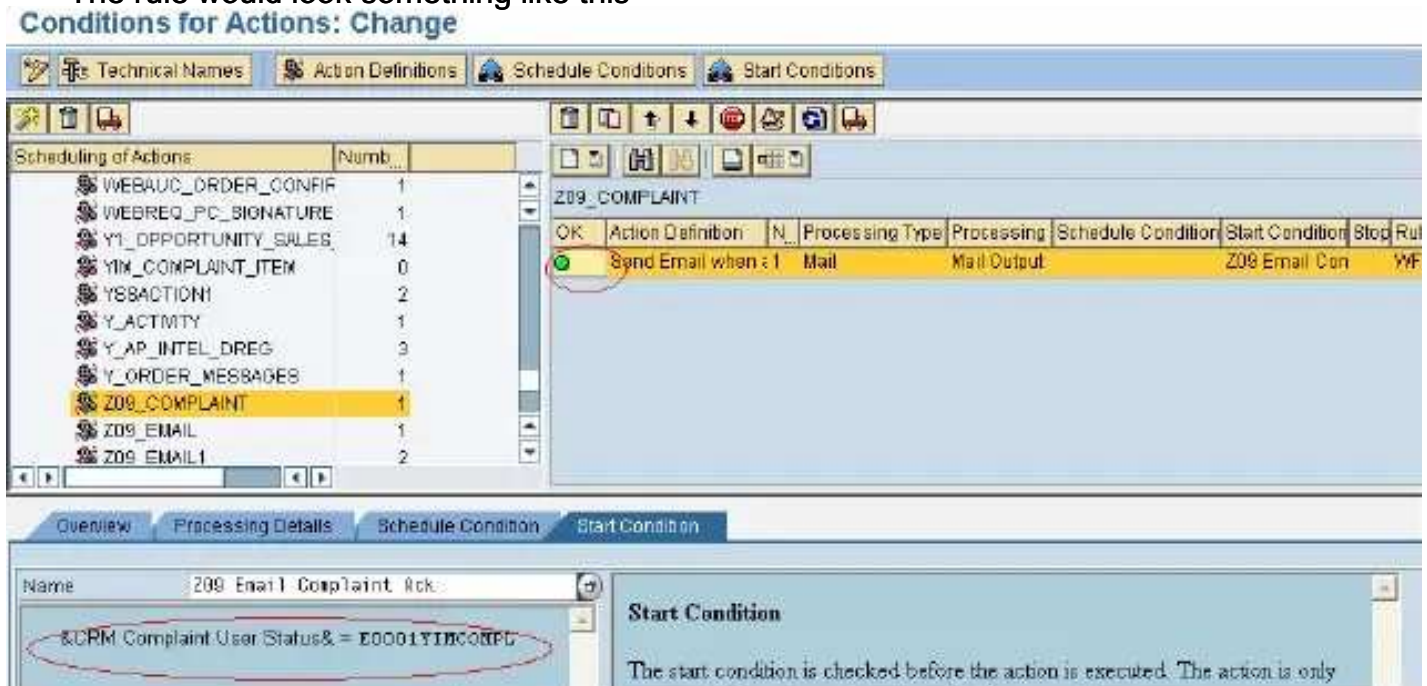
Operators	Logic	Expression 2	Description
=	And	CRM Complaint	Current Object
≠	Or	Functional Methods	Methods, Can Be Called in Expressions
<	Not	GUID 22	Globally Unique Identifier in 32-Character
>		Object type status	Object type for status management
>=		Status profile	Status profile
<=		Status Object no.	Status Object Number
[x]		User Status	Current User Status
[x]		System Status	Current system status
		Transaction Number	Business Transaction Number

Constant:

- Now in the Constant, when you click on F4, you will get a list of Status Profile to Choose From. In our example we are choosing the Status Profile = YIMCOMPL. (Note: The Status profile would come from the Transaction. In our example this happens to be YIMC.). Choose the Status E0001 which is nothing else but “Open”.



- The rule would look something like this



7. Now go to the Transaction IMG Customer Relationship Management→Transactions→Basic Settings→Define Transaction Types. Search you transaction and go ahead and change the Action Profile = Z09_Complaint. (In our example we are using the transaction CRMC. You of course need to take a copy of it and work on it.)

Trouble Shooting Points:

1. Ensure that the email address is maintained in your Biz Partner. IN our example it has to be maintained for the partner function "Customer"
2. Follow the steps carefully as documented in the screen shots.

Testing Steps for Email Acknowledgement.

1. SAP Menu→Service→Maintain Complaints and In-house repairs. Click on Business Transaction→Create→Complaints→<Your Transaction >. Enter the necessary information and click on Save. Note By default when a complaint is raised the status is = Open and hence this satisfies the condition for the email to be triggered.
2. Go to the Transaction Data. Choose Tab Actions and see your email has been listed as shown in the fig below.



3. Go to the Transaction SCOT. Press Ctrl + F7. Click on Start Button and you shall see your complaint acknowledgement being finally triggered to the user's inbox . Click on the Enter Button.



4. Now go back to your inbox and see if the mail arrived.

Result

Email gets triggered to the customer using the actions.

Related Content

http://help.sap.com/saphelp_crm50/helpdata/en/25/d734397ac95467e10000000a11402f/frameset.htm
http://help.sap.com/saphelp_crm50/helpdata/en/3e/c4308945ca4953bb100b9661eab3c2/frameset.htm
http://help.sap.com/saphelp_crm50/helpdata/en/83/287b6d3da748c2be1d46ccdaebca88/frameset.htm

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