

No. 25

SAP CRM

# SAP CRM Security

SAP CRM 7.0, SAP S/4HANA Service and the move to the cloud, explained for beginners

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OJAYO SERIES · NO. 25

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**SAP CRM Security**
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The information in this book is provided for education. Product features change between releases; always confirm details in the official documentation for your release before changing a production system. Screens marked “Illustration” are simplified drawings, not captures of real SAP software. Company and person names in examples are fictional.

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BEFORE YOU BEGIN

# How to use this book

What this book covers, who it is for, and how to use it.

Customer relationship management, or **CRM**, holds some of the most sensitive data a company has: who its customers are, what they buy, what they complain about, what deals are in the pipeline and what customers have agreed to receive. SAP CRM 7.0 has run marketing, sales and service for thousands of companies, and many still use it today while they plan the move to SAP S/4HANA or to the cloud.

This book explains **how SAP CRM is secured**, in plain language for beginners, and how its security ideas carry over to the successor products.

## Which versions this book covers

- **SAP CRM 7.0** with its enhancement packages, the last release of the on-premise CRM in SAP Business Suite 7. SAP provides mainstream maintenance for Business Suite 7 core applications, including CRM 7.0, until the end of **2027**, with optional extended maintenance from 2028 to the end of **2030** for an additional fee.
- The main successors: **SAP S/4HANA Service**, the **SAP S/4HANA for customer management** add-on, and the cloud solutions **SAP Sales Cloud** and **SAP Service Cloud**.

The CRM-specific chapters describe CRM 7.0 as it stands in its final releases. The migration chapter explains what changes in the target products, at the level of concepts rather than screens.



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## Who this book is for

- **Security analysts** who must maintain CRM roles or plan the migration of CRM access.
- **CRM consultants** who want to understand business roles, UIU_COMP and the Access Control Engine.
- **Auditors and data protection officers** who review access to customer data.
- **Project members** moving from CRM to S/4HANA or SAP's cloud front office.

## How the book is organized

- **Part I: Foundations** (Chapters 1 to 3): what CRM does, where it is going, and how its access control is layered.
- **Part II: Securing CRM** (Chapters 4 to 11): business roles, UI components, business transactions, the organizational model, business partners, the Access Control Engine, marketing, service and the Interaction Center, and troubleshooting.
- **Part III: Operating and moving on** (Chapters 12 to 17): integration, data protection, segregation of duties and monitoring, migration to the successors, a worked example and checklists.

## Conventions

**TIP**
Practical advice you can apply straight away.

**IN SAP**
Product-specific details and names.

**WATCH OUT**
Common misunderstandings.



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**KEY IDEA**

The one thing to remember from a section.

## A note on screens and examples

Screens are **simplified illustrations**, not copies of SAP screens. Object names come from SAP's standard; confirm the exact fields in your own system with **SU21**, **SU24** and an authorization trace. All company and user names are invented.



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PART I

# Foundations

CRM security makes sense once you know what CRM does, where SAP is taking it, and how its layers of access control fit together.



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CHAPTER 1

# What SAP CRM does

SAP CRM covers marketing, sales and service. Each area brings its own data and its own risks.

## The main areas

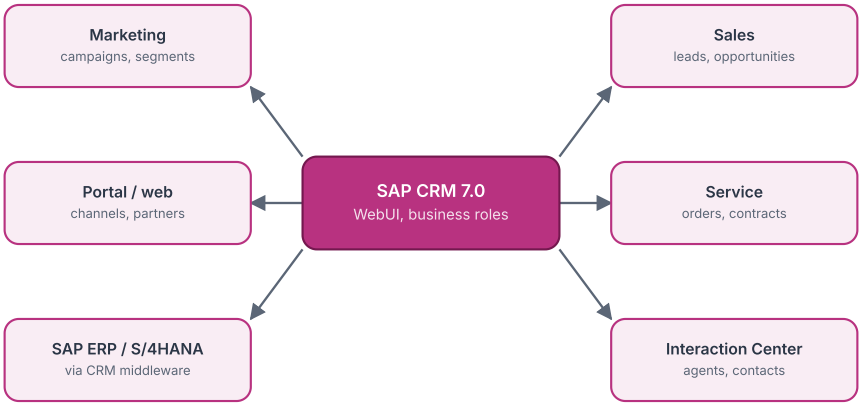



**Figure 1.1** SAP CRM and its main areas.

- **Marketing**: target groups, campaigns, marketing permissions and lead generation.
- **Sales**: accounts and contacts, activities, leads, opportunities, quotations and orders.
- **Service**: service requests, service orders, service contracts, complaints and installed base.
- **Interaction Center (IC)**: a contact-center workplace where agents handle calls, e-mails and chats.
- **Channels**: web, partner and mobile scenarios.



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Most users work in the **CRM WebUI**, a browser-based interface organized by **business roles**. Behind it, CRM exchanges data with SAP ERP or SAP S/4HANA through the **CRM middleware**.

## What is at stake

CRM data is valuable in three ways:

1. **Commercial value**: pipelines, prices, quotes and customer lists are exactly what a competitor or a departing salesperson would like to take.
2. **Personal data**: contacts, consumers and service history are personal data under privacy laws such as the GDPR.
3. **Process integrity**: service confirmations and orders can lead to billing; wrong changes can mean lost or false revenue.

## Typical risks

- A sales representative **exports the full customer list** before leaving.
- Agents in a contact center can **see all customers**, not only those in their market.
- A marketing user sends campaigns to contacts who **did not consent**.
- Technical users for the middleware have **far more access** than the replication needs.
- A service technician **confirms and bills** work that was not done.

**KEY IDEA**

CRM security is as much about **visibility** (who may see which customers and documents) as about **actions** (who may create or change them). Plan both.



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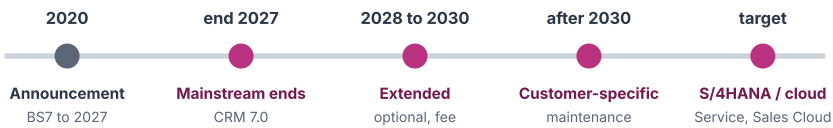
CHAPTER 2

# Where SAP CRM is going

SAP CRM 7.0 is in its last years of mainstream maintenance. Security work today should support the move to its successors.

## The maintenance timeline

SAP announced in February 2020 that it would provide mainstream maintenance for SAP Business Suite 7 core applications, which include **SAP CRM 7.0**, until the **end of 2027**. Customers who need more time can buy **extended maintenance** from the beginning of 2028 to the end of 2030, at a premium of two percentage points on the maintenance base. Customers who do not choose extended maintenance, or whose extended maintenance ends, move to **customer-specific maintenance**.




*Based on SAP's maintenance strategy for SAP Business Suite 7 core applications.*

**Figure 2.1** SAP CRM 7.0 maintenance timeline.

## The successor options

There is no single "CRM 8.0". Companies choose among several targets depending on their processes:



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| Target | What it covers | Security model |
|---|---|---|
| SAP S/4HANA Service | service processes in S/4HANA | PFCG / business roles, Fiori |
| S/4HANA for customer management | CRM functions as add-on in S/4HANA | PFCG roles, CRM-like objects |
| SAP Sales Cloud / Service Cloud | cloud front office | cloud roles, SAP Cloud Identity |
| SAP Customer Data Cloud | consumer identity, consent | separate cloud admin model |

**Figure 2.2** Common successors to SAP CRM 7.0 and their security models.

- **SAP S/4HANA Service** brings service management into S/4HANA, combining functions from SAP CRM service and the classic customer service component of ERP.
- **SAP S/4HANA for customer management** is an add-on that brings CRM functions into the S/4HANA system.
- **SAP Sales Cloud** and **SAP Service Cloud** are SaaS front-office solutions in SAP's customer experience portfolio, often combined with S/4HANA as the back office.
- **SAP Customer Data Cloud** covers consumer identity and consent for consumer-facing businesses.

> **WATCH OUT**
>
> Do not assume that CRM roles can be "migrated" one to one. The cloud solutions have their own role models and administration, and S/4HANA uses Fiori business roles. Treat the move as a **redesign** based on today's jobs, using the CRM roles only as input.

## What this means for security work now

- **Clean up** CRM roles and users now; it makes the analysis for the new system much easier.
- **Document** which business roles, UI components and ACE rules exist and why.



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- **Map data ownership**: which team owns accounts, contacts, consent and service data.
- Keep CRM **patched** until it is switched off. Systems near their end of life are easy to neglect.



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