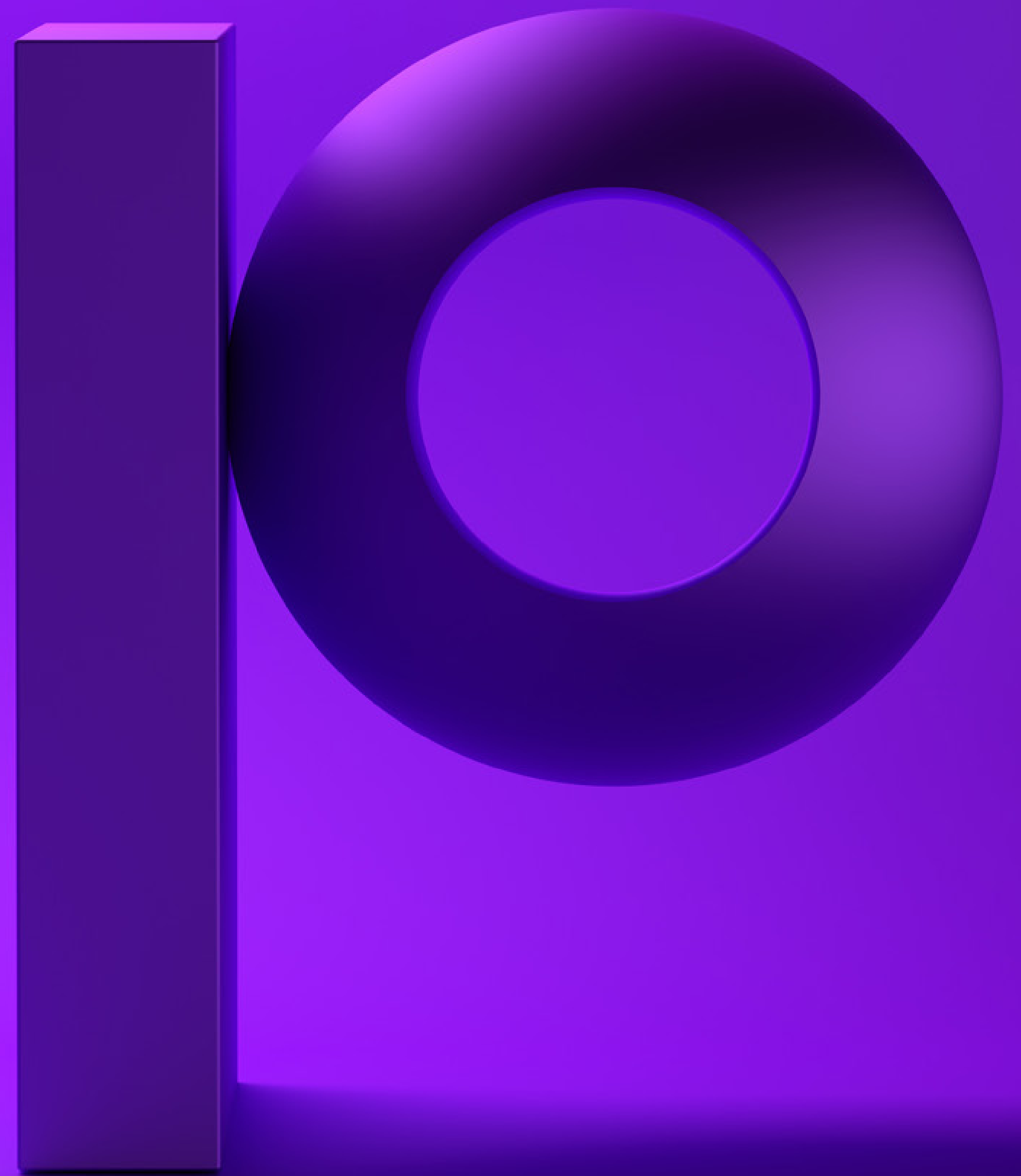


precisely

# How to Solve the Top 10 Customer Master Data Challenges in SAP®

With smart data management solutions  
designed for business teams





Creating and updating customer master data records in SAP is an essential business function for all organizations. Slow, manual processes or poor-quality data can lead to delays in order processing and a host of downstream shipping and invoicing problems.

If you're charged with streamlining customer master processes or improving data quality, this eBook is for you. Read it to get practical tips on how to:

- Cut the time it takes to create new customers by 50% or more
- Reduce the number of duplicate customer records in your SAP system
- Streamline customer updates, extensions, and deletions
- Collect the customer data required to comply with internal and external policies
- Get higher-quality addresses, email, and other key data

We'll highlight the top ten challenges that companies typically face with managing customer data in SAP and show you how to build smart automation solutions—without needing SAP technical coding skills.







## Challenge 1: **Slow, manual create and update processes**

Creating and updating customer master data records in SAP is an essential business function for all organizations. Slow, manual processes or poor-quality data can lead to delays in order processing and a host of downstream shipping and invoicing problems.

If you're charged with streamlining customer master processes or improving data quality, this eBook is for you. Read it to get practical tips on how to:

- Cut the time it takes to create new customers by 50% or more
- Reduce the number of duplicate customer records in your SAP system
- Streamline customer updates, extensions, and deletions
- Collect the customer data required to comply with internal and external policies
- Get higher-quality addresses, email, and other key data

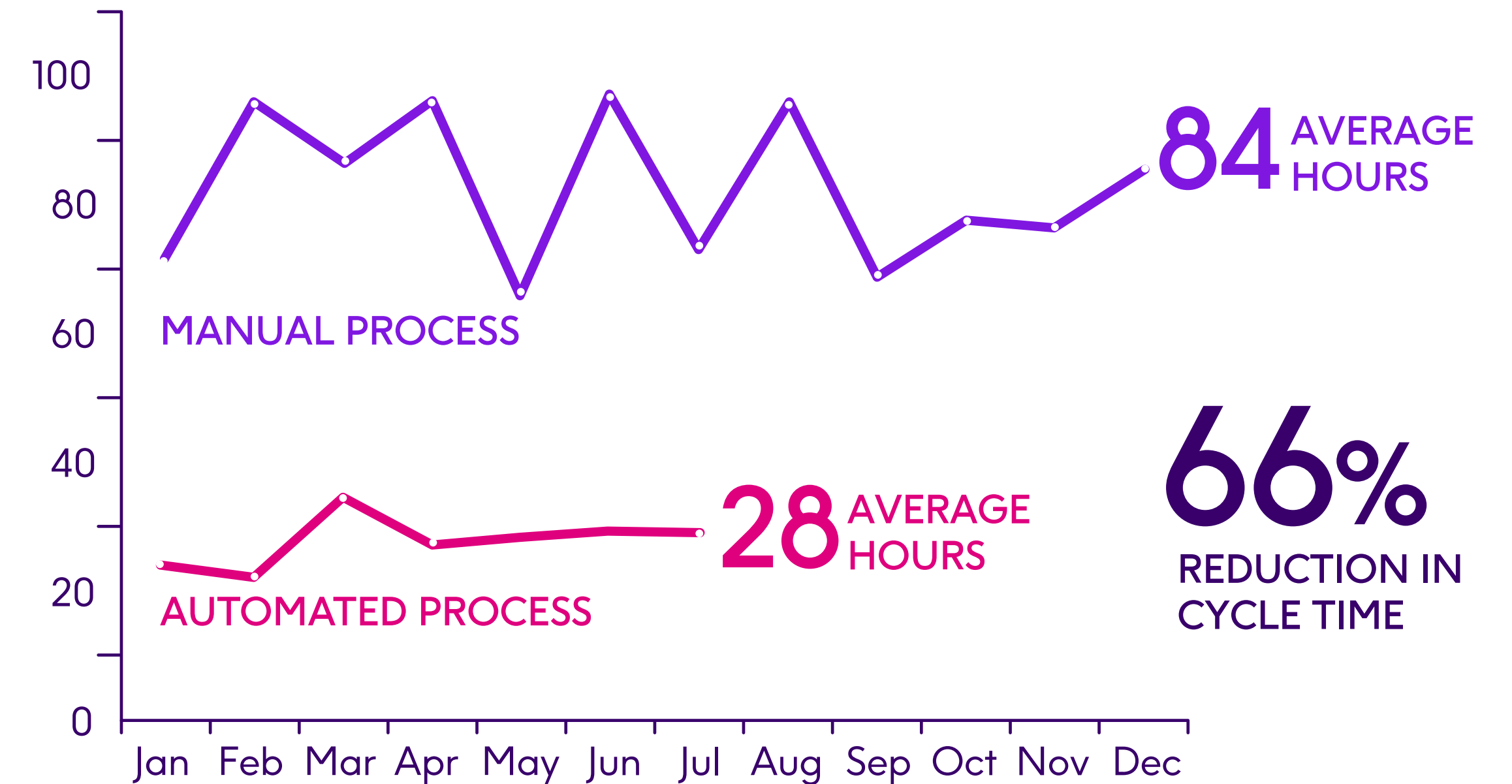
We'll highlight the top ten challenges that companies typically face with managing customer data in SAP and show you how to build smart automation solutions—without needing SAP technical coding skills.

Solution:

## Streamline your process with an automated forms and workflow solution

What if you could build a solution that automatically routes the create or update request to the responsible parties? What if different people could work in parallel on supplying or approving the customer data? And, what if instead of manually keying data into SAP, you could validate and post to SAP with a couple of clicks?

All these things are possible with an automated workflow solution. And the time savings can be dramatic. We regularly see our customers reduce their customer create cycle time by 50% or more, and realize even greater time savings for customer updates—helping them process orders faster and better serve their customers.



These results are from an industrial supplies distributor who automated their customer creation process with Precisely Automate software.

## Key workflow features that speed up data collection and data entry into SAP:

- Automated posting of data into SAP
- Parallel task assignments
- Role-based form views
- Pre-population of data based on business rules
- Ability to copy from a reference customer
- Automated email notifications to keep everyone on task

**NORTHWEST HOLDINGS** **CUSTOMER CREATE REQUEST**  
Requester View

**CUSTOMER MASTER CREATION REQUEST**

Request ID: CustomerCreate-0000018 Submitter: Charles Howard Date Requested: 8/18/2021

☐ Check for Duplicates?

**GENERAL**

Title: Company: CHARTER HOLIDAY Search Term: CHARTER

Email Address: charles.howard@northwestholdings.com Transportation Zone: West0000000004 Time Zone: PST

**ADDRESS**

21820 N Creek Pkwy S, Bothell, WA, USA  
21820 North Creek Parkway South

Street Address: Street Address Line 2: Bothell King County

City: County:

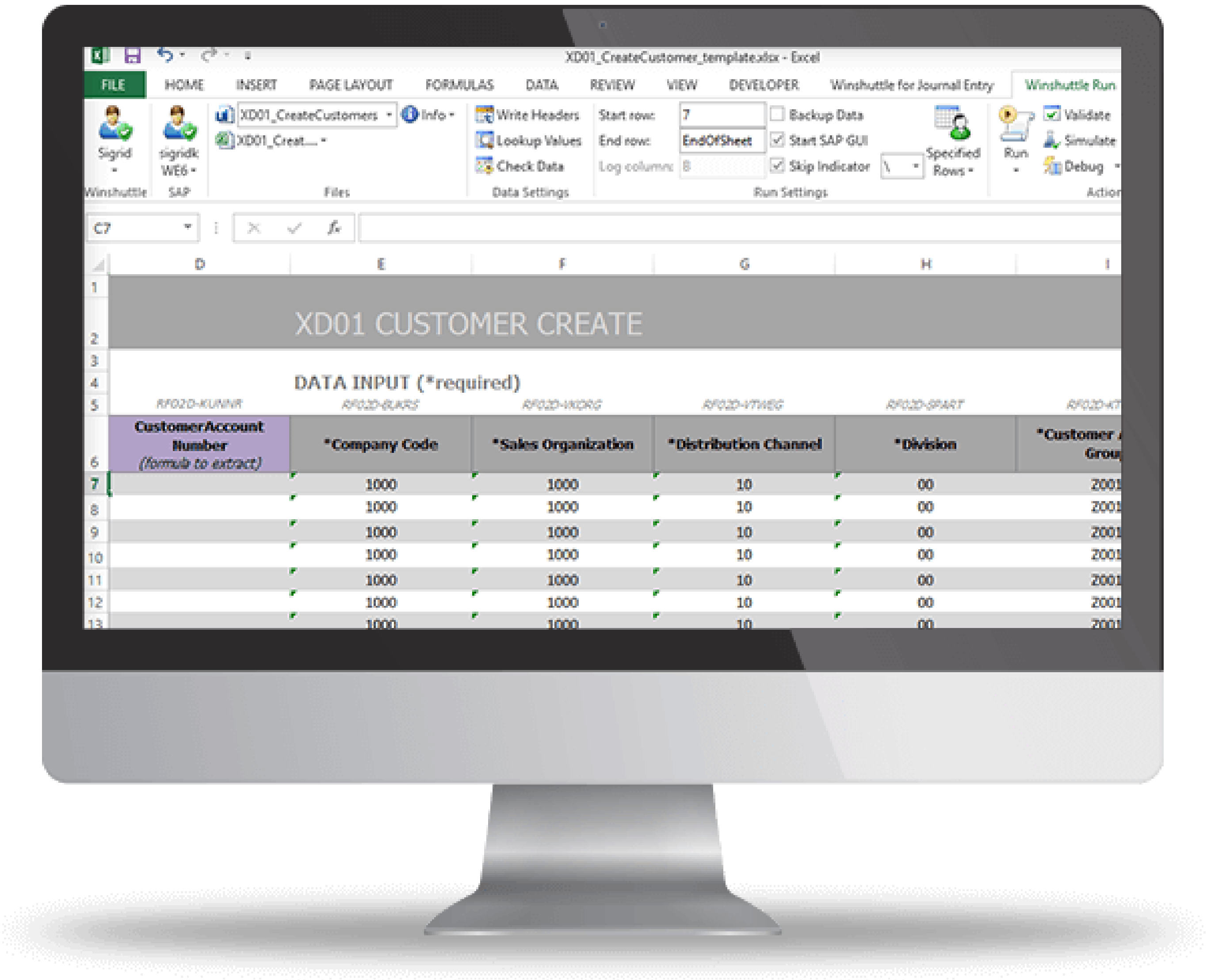
Map Satellite

Example of a web form created with Precisely Automate Evolve. You can use a form like this to create a new customer master record or extend an existing customer to a new sales organization or company code.

# Streamline mass creates and updates using Excel

Web forms are a great solution for handling create and update requests for one or a handful of records, but if you need to process large numbers of records, an Excel-based solution is the way to go.

SAP analysts, master data professionals, or SAP super users familiar with your customer processes and data can use Precisely Automate Studio to build solutions that exchange data with SAP. They then embed these solutions into an Excel workbook that anyone in the business can use to create or change batches of records.



One person can use this Excel-based solution to create or update records, or you can build an automated workflow that routes the Excel files to the appropriate people based on your business rules.





## Challenge 2: **Duplicate customer records**

Duplicate customer records in SAP can cause all sorts of confusion and downstream problems for both customers and your internal teams—as well as lead to inaccurate reporting. Without adequate controls on the data coming into SAP, it's easy to see how duplicate sold-to, ship-to, bill-to, or payer records can be created.

Solution:

## Make it easy to search for existing customer records

Give your teams an easy way to search for existing records using the fields that make sense for your business, and drastically reduce, or even eliminate the number of duplicate records created.

The screenshot displays a web application interface for Northwest Holdings. At the top, the logo and the title "CUSTOMER CREATE REQUEST" are visible, with a sub-header "Requester View". Below this, a section titled "CUSTOMER MASTER CREATION REQUEST" contains fields for "Request ID" (CustomerCreate-00000000), "Submitter" (Charles Howard), and "Date Requested" (10/24/2024). A checkbox labeled "Check for Duplicates?" is checked. The main section is titled "CUSTOMER SEARCH" and contains a "SEARCH CRITERIA" table with various search fields and their values.

Customer Number Range GE	Customer Number Range LE	Sales Org Range GE	Sales Org Range LE
00000000	00000000		
do not use	do not use	do not use	do not use
Distribution Channel Equal	Division Equal	Company Code Range GE	Company Code Range LE
do not	do not	do not	do not
Customer Name Like	Sort Field Like	City Like	Country Equal
CHARLES+HOWARD*	CHARLES*	BONNELL*	US
do not use	do not use	do not use	do not use
Region Equal	Postal Code Equal	Record Count	<input type="checkbox"/> Sort Records Count Only
Washington		100	
do not use	do not use		

A green button labeled "Query Customers" is located at the bottom right of the search criteria section.

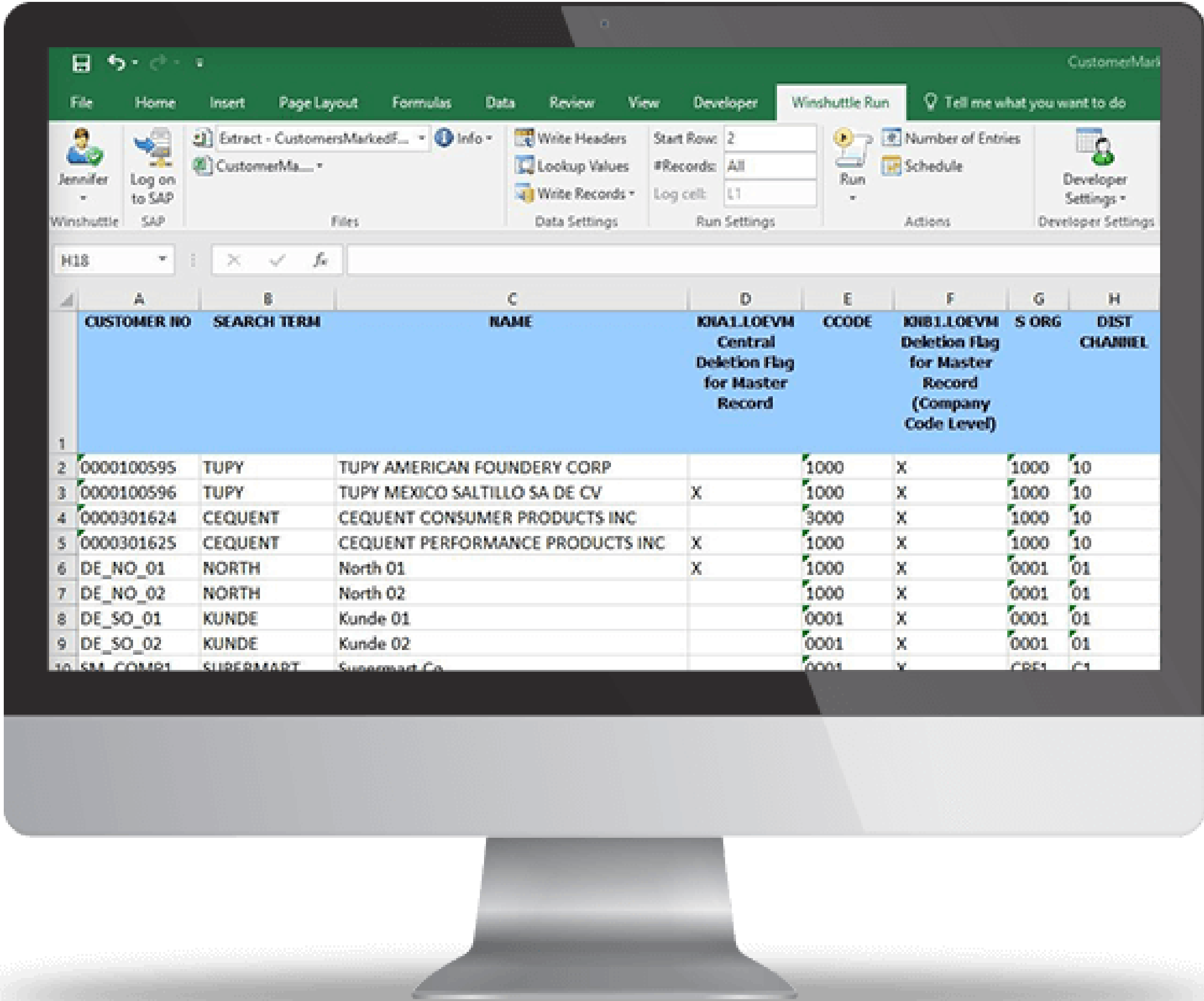
Make it easy for requestors to search by customer name or other key fields with wildcards. Display records that match your search criteria and even allow 'copy from' functionality, making it faster to create new



# Clean up duplicate records

We've shown how you can prevent new duplicates getting into your system, but how do you find and flag existing duplicates?

With Automate Studio you can quickly build an Excel-based solution to extract customer records based on your chosen criteria, identify duplicates and flag them accordingly. Then with a click of a button, change the status of those records in SAP. All of this without having to touch the SAP GUI, waiting for IT to build a solution, or needing specialist ABAP, SQVI or other technical coding skills.



Make quick work of duplicate clean up with Automate Studio, a data management tool designed for business teams—no technical coding skills required





### Challenge 3:

## Lack of compliance with business procedures and rules

If you're using manual processes to create and update your customer master data, it's extremely challenging to enforce your business rules and procedures on a consistent basis. For example, your policies may state that a credit check must be completed for certain order sizes before you can create a new customer record.

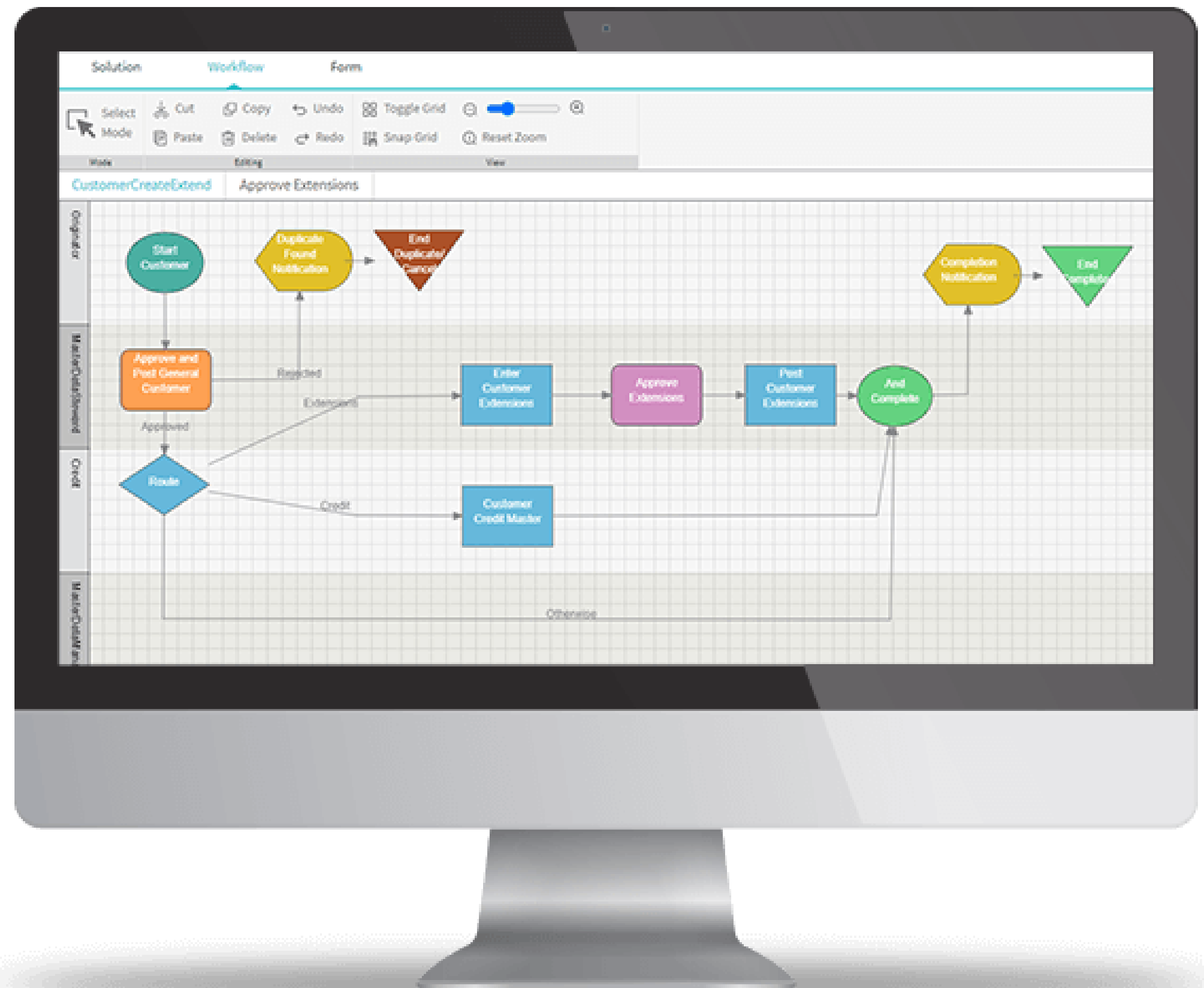
Without formal controls in place, it's easy for this type of rule to be circumvented or missed, leading to compliance breaches and unnecessary business risk.



## Solution: Build automated workflows with formal controls

With sophisticated SAP data automation software, like Automate Evolve, your team can build and roll out solutions that ensure compliance with your business procedures.

Whether it's defining formal approval flows or using smart form logic to trigger workflow steps or data requirements based on business user input, you can lock down your customer master processes to reduce risk and improve data quality.



This is an example of a workflow for creating or extending customer records developed with Automate Evolve. With a visual design canvas, it's easy to build a workflow according to your process.





## Challenge 4: **Missing customer data**

Incomplete customer data can delay order processing, shipping and invoicing, as well as creating a lot of back and forth between your customer service teams and your customers—wasting time and jeopardizing customer satisfaction.



Solution:

## Make it easy to collect required data using web forms

The first step is to define your mandatory customer master fields, then build a forms and workflow solution with Automate Evolve that embeds those requirements. Requestors and other workflow participants will not be able to submit the form without providing the required data—even if those fields are not required in your SAP system.

You can also require certain documentation to be submitted along with the data fields, such as tax-exempt forms or credit reports, helping you comply with internal controls.

The image shows a computer monitor displaying a web form for creating a business partner in SAP. The form is divided into two main sections: 'BUSINESS PARTNER GENERAL DATA' and 'CUSTOMER SALES DATA'. The first section includes fields for 'New Business Partner Number' (with a value of 0000000000), 'Name' (CHARLES), 'Company' (CHARLES), 'Search Term' (CHARLES), and 'Language' (EN). The second section includes fields for 'Telephone', 'Email Address', 'SAP Message General Role' (Business partner 0000000000 created), 'Sales Organization' (ST00), 'Distribution Channel' (10), 'Division' (00), 'Sales District' (ST00), 'Price Group' (00-Wholesale), 'Customer Pricing Procedure' (1), 'Price List Type' (00-Standard), 'Delivery Priority' (00-Normal), 'Delivery Plant' (ST00), 'Incoterms 1' (CIP), 'Incoterms 2' (BOTH), 'Payment Terms' (NT00), and 'Tax 1' (0-Non Tax). A 'Validate Customer Sales' button is located at the bottom of the form.

Example of a form created with Automate Evolve to create either customers or vendors in an SAP S/4HANA system. You can make fields required in the form, even if those fields aren't required in SAP.



## The cost of bad data

**\$3.1**

Trillion per year  
in the US

IBM, 2016

**\$15**

Million per year  
per organization  
in the US

Gartner, 2018

**UP  
TO 20%**

of revenue is lost  
due to bad data

Kissmetrics, 2020

Challenge 5:

### Unstandardized, poor-quality data

If you manually enter data via the SAP GUI, chances are that there is little standardization when it comes to data formatting. For key fields such as email, address, and phone numbers this can cause real problems downstream, including failed delivery attempts and poor customer communications.



Solution:

# Enforce business rules and enhance data with web forms

Build and rollout a forms and workflow solution with built-in data ‘guardrails’ and put an end to unstandardized data. Enforce your business rules for formatting key fields, such as requiring dashes in phone numbers or using all caps for customer names.

You can also enhance your data by connecting to third-party web services that can standardize addresses, provide GPS location details for ship to customers, and validate email addresses.

## How proactive data stewardship saves you money

Precisely Automate platforms provide an extensive range of data stewardship capabilities that enable your business teams to improve data quality, whether they’re using a web form or an Excel workbook to exchange data with SAP.

Precisely Automate data stewardship capabilities	Excel	Web form
Search for duplicates		
Smart form logic		
Role-based views		
Field standardization		
Easy required fields		
Copy ‘like’ records		
Live SAP validation		
Modifiable field drop down values		
SAP F4 lookups		





## Challenge 6: **Managing different customer types**

Customer master data specialists know that there are multiple customer types or account groups that you must create and maintain—each with its own set of data requirements. And it's not just the basic sold-to, bill-to, ship-to, and payer record types that you need to worry about. Most companies set up custom account groups to deal with different operating procedures and data requirements across the business.



## Solution: Build flexible workflow solutions

The first step is to define your mandatory customer master fields, then build a forms and workflow solution with Automate Evolve that embeds those requirements. Requestors and other workflow participants will not be able to submit the form without providing the required data—even if those fields are not required in your SAP system.

You can also require certain documentation to be submitted along with the data fields, such as tax-exempt forms or credit reports, helping you comply with internal controls.

The image shows a computer monitor displaying a web application interface for SAP customer master data management. The interface is divided into several sections: CONTROL, MARKETING, PAYMENTS, CONTACTS, and PROCESS. The MARKETING section contains fields for Customer ID, Customer Classification, Industry Key, Year for Sales, Annual Sales, Currency of Sales, Number of Employees, and Year for Number of Employees. The PAYMENTS section contains fields for Bank Country, Bank Key, Bank Account Number, and Bank Account Holder. The CONTACTS section has a 'Validate General Data' button. The PROCESS section has a 'Choose Files' button. The interface is clean and professional, with a dark header and footer.

Use smart form logic based on your customer account group or other criteria to determine steps in your workflow, data collected, and field-level attributes.





## Challenge 7: **No visibility into requests status**

Precisely Automate customers tell us that understanding where a create or update request is in the process is one of their biggest issues—especially if someone from sales management is demanding to know so they can process a big order!

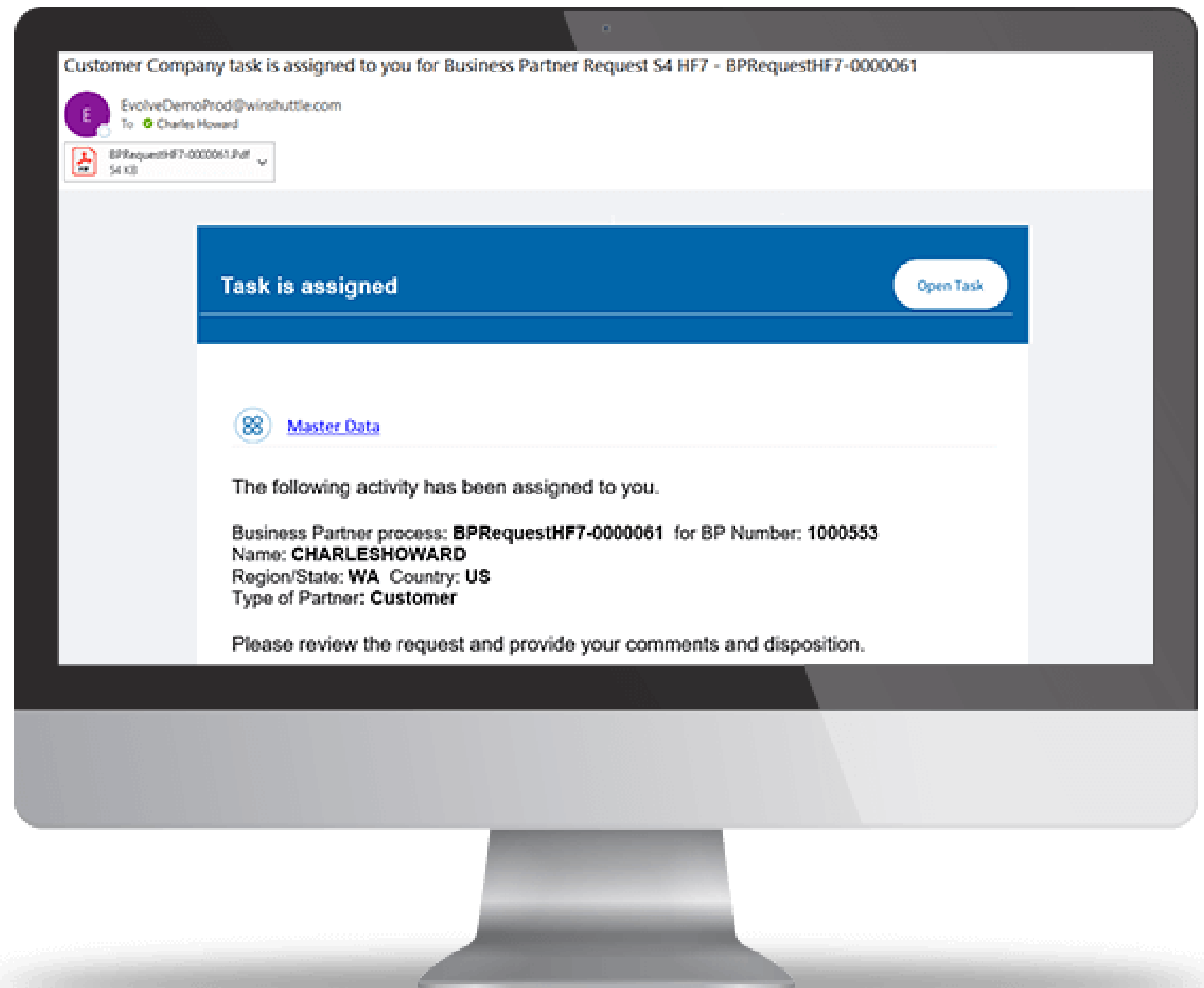
Without automation, pinpointing who is working on the request is a manual, time-consuming process that can involve multiple emails or phone calls.

## Solution: Easy access to detailed process data

One of the main benefits of an automated data management solution is being able to see exactly where each request is in the process—with a few clicks.

With Automate Evolve each person in the process can see workflow history in notification emails or in the web form they use to supply or approve data—so they always know what actions have been taken by whom, and when, and can see what's next in the process.

Process owners or participants can also view the status of each process from a centralized website.



Workflow participants can see detailed process history either in text form as is shown in the example above or get a graphical view of the where the process is in the workflow.





Challenge 8:

## Providing audit trails in a timely fashion

If you're manually entering data into SAP via the GUI, it can be cumbersome and time-consuming to report on who did what with your customer data, and when additions or changes occurred.

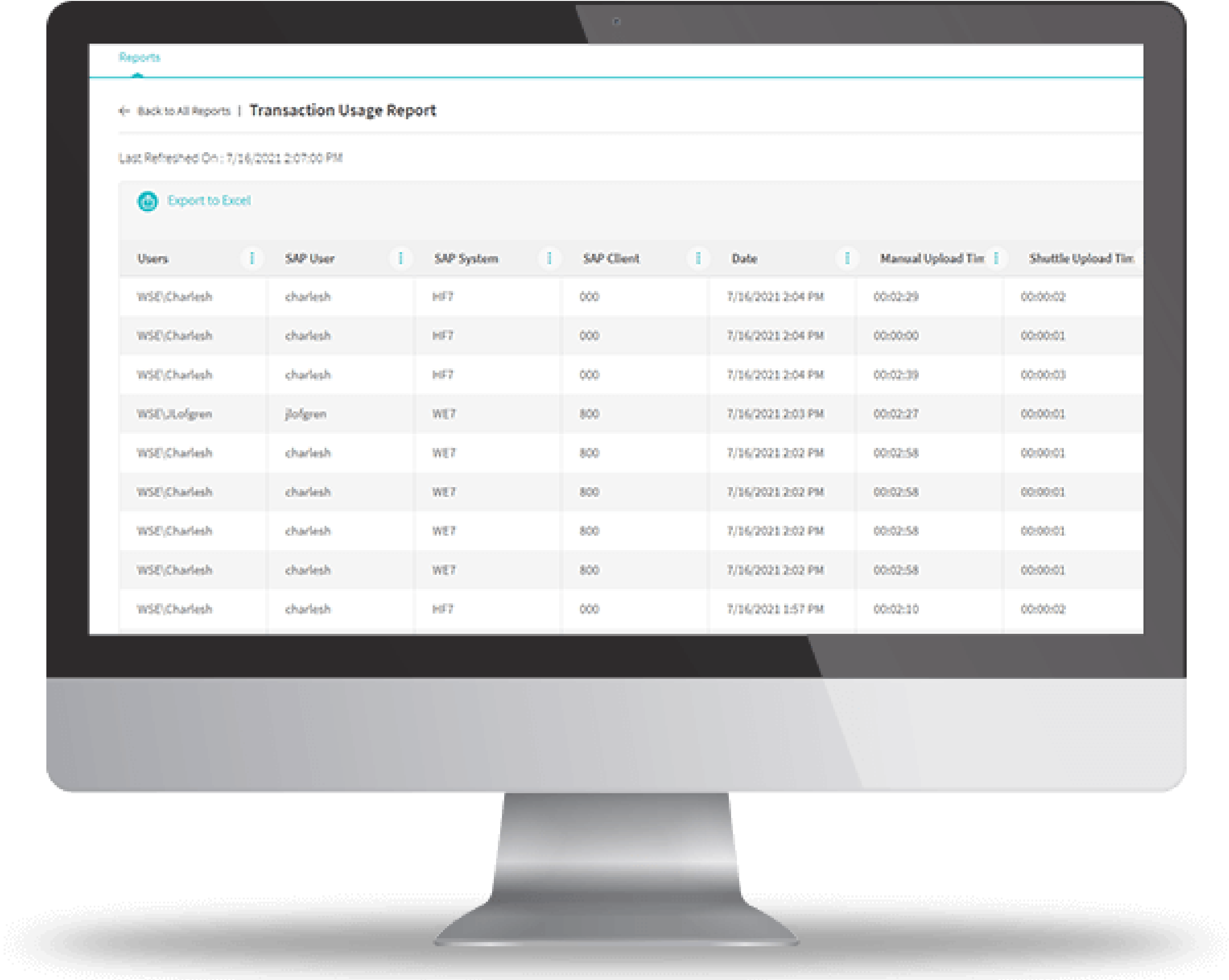


Solution:

# Simplify audit reporting with pre-built reports and easy access to data files

Be sure to choose an automation platform that makes it easy to pull reports that show who uploaded, extracted or approved data when, and which systems and t-codes were involved.

Automate Evolve allows you to quickly get to the data files exchanged with SAP and export them to Excel if needed—greatly simplifying and speeding up your auditing process.



If you need to provide an audit trail for your customer master data, Automate Evolve enables you to get the data you need quickly.



## Challenge 9: **Measuring performance**

Without automation, it's very challenging to accurately measure how long it takes to complete customer create or change requests at each stage of the process, and involves combing through emails and checking logs in SAP—a tedious and time-consuming task. Measuring other metrics, such as the number of records processed or data errors is also a hassle.

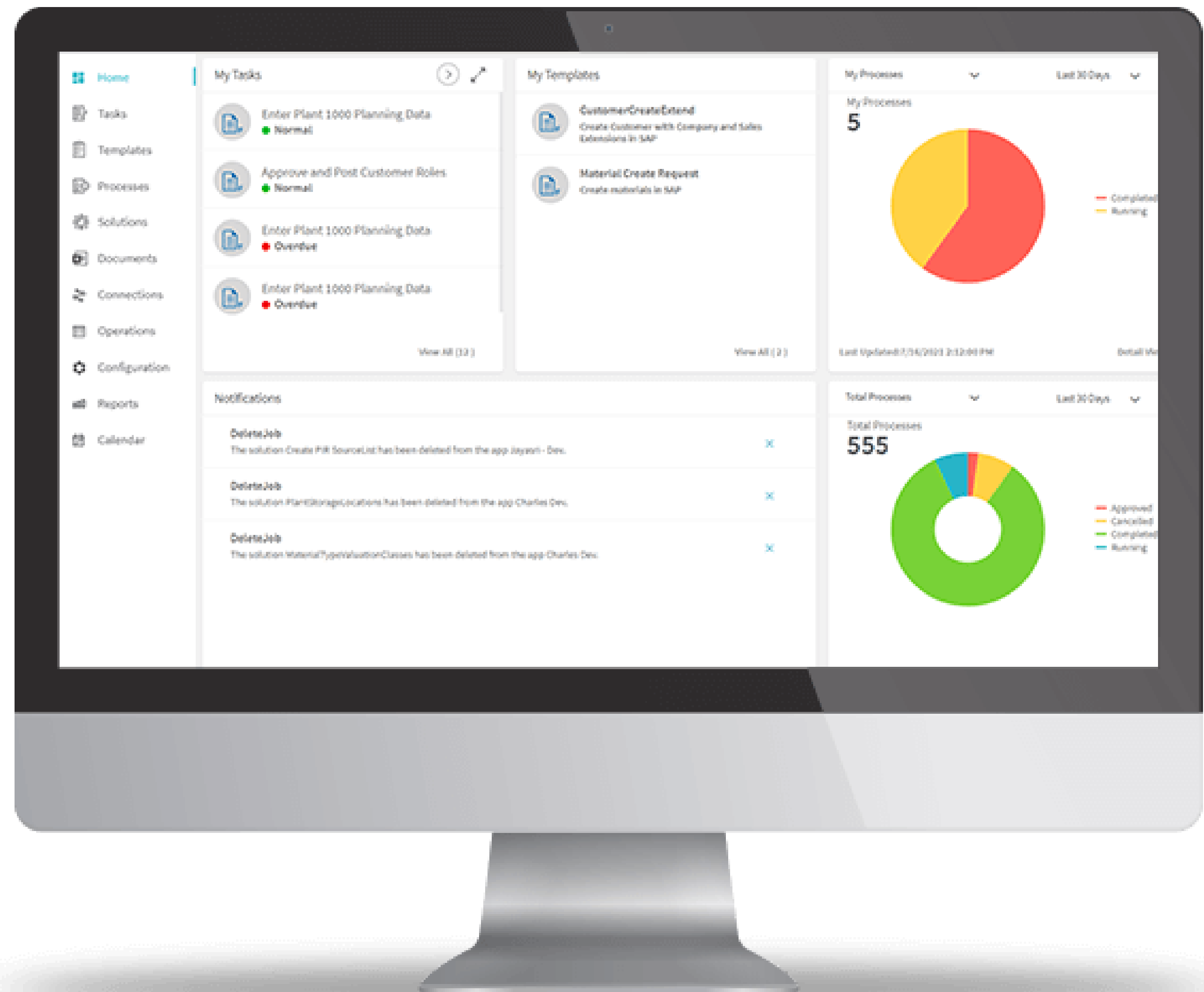
Without easy access to these key metrics reporting on Service Level Agreements (SLAs), productivity, and data quality is a slow process at best, or at worst, doesn't get done at all—hampering improvements and jeopardizing resources.



## Solution: Automatically track key metrics

A key benefit of automating your customer master process is getting instant access to key process metrics. Automate Evolve provides several out-of-the-box dashboard reports that make it fast and easy to monitor productivity, data errors, and time and costs savings.

With Automate Evolve, you can also set SLA goals for each step in your workflow, and get access to timestamp data for those discrete steps—making it easy for you to calculate if you're meeting your goals and identify bottlenecks so you can act to resolve any problems.



Track key metrics by user and t-code, including the number of records processed, and time and cost savings.



## Eliminate manual data entry into SAP and realize huge time savings

These numbers show the average time Precisely Automate customers save by automating data entry tasks with Precisely Automate software versus working directly in the SAP GUI.

You can track how much time your organization is saving with the out-of-the-box dashboards included in the Precisely Automate platform.

“Due to the time savings we’ve seen with the Precisely Automate platform, I haven’t needed to add headcount even as the company continues to expand.”

Joseph Wieczorek  
Director, Master Data Organization Reynolds Leveraged Services

94%

Customer  
create  
XD01

78%

Customers  
change  
XD02





Challenge 10:

## Disgruntled customers, sales teams, and master data teams

Many of the challenges we've outlined in this eBook cause downstream business problems that directly lead to unhappy customers and sales teams. But customers and sales aren't the only ones feeling the pain—often the master data team is blamed for delays and data errors when in reality, they are waiting for the business and handed bad data.

Working nights and weekends to keep up with all of the manual data management tasks saps morale and takes time away from higher value activities.



Solution:

## Go faster, improve data quality, and increase happiness

By now, hopefully, you've seen that solving the first nine customer master data challenges can make a real impact on your business. You can dramatically reduce the time it takes to process requests and improve the overall level of data quality— all without SAP technical coding skills or reliance on IT.

Do that, and you'll solve challenge number 10 and have happier customers, happier sales people, and happier, more productive master data teams.





# Make an impact on all your master data and business processes

Precisely Automate software enables you to make an impact across all your SAP master data—materials, vendor, finance, plant maintenance, HR, etc.—and not just on the top-level objects, but on any master data records across the business.

We can also enable you to speed up and improve data quality for transactional tasks such as invoicing, journal entries and sales orders.

“The Precisely Automate platform allows you so much flexibility to build in data governance, and route correctly to your business users. It provides business ownership capabilities that make the process very simple and allows users to get the work done on time easily.”

Julie Priebe  
Data Integrity Manager, Kellogg





Precisely is the global leader in data integrity, providing accuracy and consistency in data for 12,000 customers in more than 100 countries, including 99 of the Fortune 100. Precisely's data integration, data quality, data governance, location intelligence, and data enrichment products power better business decisions to create better outcomes. Learn more at [www.precisely.com](https://www.precisely.com).

[www.precisely.com](https://www.precisely.com)

©2024 Precisely. All other company and product names used herein may be the trademarks of their respective companies.