SAP Business Partner (SAP BP)

Release 4.6C
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## Icons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Image" /></td>
<td>Caution</td>
</tr>
<tr>
<td><img src="image2.png" alt="Image" /></td>
<td>Example</td>
</tr>
<tr>
<td><img src="image3.png" alt="Image" /></td>
<td>Note</td>
</tr>
<tr>
<td><img src="image4.png" alt="Image" /></td>
<td>Recommendation</td>
</tr>
<tr>
<td><img src="image5.png" alt="Image" /></td>
<td>Syntax</td>
</tr>
<tr>
<td><img src="image6.png" alt="Image" /></td>
<td>Tip</td>
</tr>
</tbody>
</table>
# Contents

**SAP Business Partner (SAP BP)** ................................................................. 5  
Business Partner Category .................................................................................. 6  
Creating Business Partners .................................................................................. 7  
Changing/Displaying Business Partners ............................................................... 8  
Business Partner Role (BP Role) .......................................................................... 9  
BP Role Contact Person ....................................................................................... 10  
BP Role Prospect ................................................................................................. 11  
BP Role Business Partner, General ..................................................................... 12  
GP-Rolle Mitarbeiter ........................................................................................... 13  
BP Role Organizational Unit ............................................................................. 14  
BP Role Grouping ............................................................................................... 15  
SAP Business Partner Data ............................................................................... 16  
Addresses ............................................................................................................. 19  
  Creating Other Addresses ................................................................................ 20  
  Assigning Address Usage ............................................................................... 21  
Bank Details ........................................................................................................ 22  
Payment Cards .................................................................................................... 23  
Business Partner Relationship (BP Relationship) ............................................... 24  
Creating Relationships (Integrated Maintenance) ............................................. 25  
Creating Relationships (Independent Maintenance) ......................................... 26  
Changing Relationships (Integrated Maintenance) ........................................... 27  
Changing Relationships (Independent Maintenance) ......................................... 28  
Relationship Category ....................................................................................... 29  
Relationship Category ....................................................................................... 30  
Relationship Category ....................................................................................... 31  
Relationship Category ....................................................................................... 32  
Rel. Cat. .............................................................................................................. 33  
Relationship Category ....................................................................................... 34  
Relationship Category ....................................................................................... 35  
Central Relationship Data ............................................................................... 36  
Extensibility ....................................................................................................... 37  
Data Transfer ..................................................................................................... 39
**SAP Business Partner (SAP BP)**

**Purpose**

The component SAP Business Partner enables you to create and manage business partners centrally. This is of prime interest if a business partner plays different roles for a company, such as contract partner and prospect.

SAP Business Partner is designed to utilize technical benefits such as data integrity and freedom from data redundancy, and to place greater emphasis on aspects relating to customer maintenance and acquisition of new customers.

**Features**

You can create a business partner in different business partner roles, and during the course of the business relationship the business partner can assume other business partner roles. No new data has to be created each time, meaning that redundant data creation and retention is avoided, and there can be no inconsistencies.

By using SAP Business Partner, it is possible to merge the partner data already held by a company in more than one system in such a way that the potential for new contracts within the same customer contact can be identified.

When you enter data, the data related to SAP Business Partner, and the application-specific data are integrated seamlessly on the processing screen.

Seamless integration of customer-specific data is possible without modification, ensuring full future maintenance, because defined interfaces exist for this purpose.
Business Partner Category

Definition
The business partner category denotes whether a business partner is a natural person (private individual) or an organization (legal person/entity or part of a legal entity, such as a department).

Use
When you create a business partner, you have to select a business partner category. Depending on the business partner category, a certain set of fields has to be filled with data. For example, if you are creating a business partner as an organization, there is a field for the legal form, whereas the field selection with a person includes first names, name affixes and gender.

Structure
The standard business partner categories are:

- Natural person (private individual)
- Group (e.g. married couple, shared living arrangement)
- Organization (e.g. company, department in a company, club, association)

It is not possible to create any other business partner categories.
Creating Business Partners

Procedure

1. Select the appropriate menu path [Ext].
   You reach the initial screen for creating data.

2. Select a grouping. Each grouping is assigned to a number range. Along with the interval, the number range determines whether internal or external number assignment is to be used.
   - If you select internal number assignment, the field bearing the name of the BP role selected must remain empty.
   - If you select external number assignment, you must enter a business partner number in the field bearing the name of the BP role selected.

3. Select the business partner category. With the BP role “contact person” the business partner category “person” is default.

4. Select at least one entry from the Screen selection.

5. Choose Continue.

6. In the processing screens that follow you now enter the required data on the business partner. Enter data in all of the required fields.
   - Using the navigation buttons, you can navigate between the individual processing screens.

7. Choose Save.

Result

You have created a business partner in the BP role you selected.
Changing/Displaying Business Partners

Prerequisites
Before you can change or display data on a business partner, you must first create a business partner.

Procedure
1. Select the appropriate menu path [Ext.].
2. Enter the required business partner.
   If you do not know the business partner number, initiate a search.
   With the F4 help select an appropriate search criterion (for example, partner by address, partner by bank details, partner by search term).
   A dialog box appears and you can now search for the business partner.
3. Select at least one entry from the Screen selection.
4. Choose Continue.

Result
The desired processing screens are displayed.
Business Partner Role (BP Role)

Definition

The basis for the definition of a BP role is a business process. The attributes of the BP role depend on the particular process involved.

Example

<table>
<thead>
<tr>
<th>Process</th>
<th>BP Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer order</td>
<td>Sold-to party</td>
</tr>
<tr>
<td>Delivery of goods</td>
<td>Ship-to party</td>
</tr>
</tbody>
</table>

Use

The standard BP roles are:

- Contact person
- Prospect
- Business partner, general

In addition there are industry-specific BP roles such as:

- IS-U: Contract partner, installer
- IS-IS-CD: Contract partner
- BCA: Account maintenance officer, account holder, authorized drawer, bank statement recipient

It is possible to create a business partner in one or more BP roles. Central data such as name, addresses and bank details only has to be created once.

Structure

With the help of field groupings in Customizing you can hide or display fields for this role.

An extension [Page 37] of the BP roles to include customer-specific attributes is possible. In theory it is possible to define other BP roles but this should only be considered if a customer has developed own applications. For more information, see the Business Data Toolset [Ext].
BP Role Contact Person

Definition

A business partner in the BP role of contact person acts as intermediary to an organization with which business contact is maintained.

Use

The BP role contact person is created in connection with the relationship “is contact person for” [Page 30]. When you create a business partner in the BP role of contact person, the system checks whether the business partner category involved is that of natural person.

Structure

With the BP role contact person you can enter data on name, address and relationships but not on bank details and payment cards.

Integration

To be able to create a relationship “is contact person for” [Page 30], you must first create a business partner in this BP role.
BP Role Prospect

Definition
A prospect is a potential customer.

Use
The BP role prospect is a suitable option for a possible future business partner with whom just a first loose contact has been made. In this way this business partner can be provided with information on a product, for instance.

Structure
For the BP role prospect you can define the name and address and control data.
BP Role *Business Partner, General*

**Definition**

The BP role *business partner, general* is not specified in any direction. Data entered in this BP role is for information purposes only.

**Use**

You use the BP role *business partner, general* to store data on a business partner who does not (yet) play any specific role for the company.

For example, at a meeting you are given a person’s business card. You might want to store this data without pursuing a specific business interest. In this case you can use the BP role *business partner, general*.

**Structure**

You can store the name and address as well as data on bank details and relationships. If a business relationship does materialize with a business partner created in this BP role, you can also create this business partner additionally in other, specific BP roles such as *contact person*.

Conversely, it is not possible to take a business partner who has already been created in a specific role and add the role of *business partner, general*. This is because a business partner created in another role automatically receives the role of *business partner, general*. 
GP-Rolle Mitarbeiter

Definition
Die GP-Rolle Mitarbeiter bezeichnet einen Arbeitnehmer des eigenen Unternehmens.

Verwendung
Wenn ein Unternehmen mit einem Arbeitnehmer des eigenen Unternehmens Geschäftsbeziehungen unterhält, können Sie die Daten des Geschäftspartners in der GP-Rolle Mitarbeiter erfassen.

Struktur
Für die GP-Rolle Mitarbeiter können Sie neben den entsprechenden Stammdaten zusätzlich die Benutzernummer und die Personalnummer des Arbeitnehmers hinterlegen.

Integration
Wenn Sie die SAP Komponente HR im Einsatz haben, stellt das System die Beziehung zu dem HR-Objekt Zentrale Person her und überprüft die Eingaben.
BP Role Organizational Unit

Definition
The BP role *Organizational unit* maps units of internal structures in your own company.

Use
For example, if two organizational units in your company with different company codes have business relations with one another, you can enter these units in the BP role *Organizational unit*.

Structure
You must create the business partners in the role of *Organizational unit* in PDOrg. This means that you have to maintain data on the name and address in PDOrg as well. The corresponding fields are not ready for input in Business Partner.

If the role of Organizational unit exists in PDOrg, you can enter changes to other master data, such as bank details, in Business Partner.
BP Role Grouping

Definition
Merging of several BP roles to simplify data maintenance.

Use
To simplify data maintenance you can merge individual BP roles into a BP role grouping. In this way it is possible to create a business partner in a BP role grouping and thus in the BP roles belonging to this grouping.

Example: From the point of view of SAP BP, the customer in the classical area of FI has the BP roles invoice recipient, payer, dunning recipient and correspondence recipient.

If you want to manage and maintain a customer (debtor) with the help of SAP BP, the best option is to select a BP role grouping that incorporates the above-mentioned BP roles.

Structure
You can define the screen structure and screen sequence for each BP role grouping individually.
### SAP Business Partner Data

#### Use

**Business Partner Data**

<table>
<thead>
<tr>
<th>Frame on screen:</th>
<th>Description:</th>
<th>What you should know:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data for initial creation of partner</td>
<td>When you select the field <em>Grouping</em> you have to make a decision on the number range. As well as the interval, the number range determines whether external or internal number assignment takes place. It is not possible to change this assignment at a later date.</td>
<td>In the IMG you define number ranges in accordance with the number assignment.</td>
</tr>
<tr>
<td></td>
<td>- Internal number assignment: During data entry the BP role field remains empty for the BP number.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- External number assignment: The BP role field has to be filled with data.</td>
<td></td>
</tr>
<tr>
<td>Screen selection</td>
<td>By selecting the screen titles you can call up the corresponding processing screens for data entry or for viewing.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>In the field <em>Business partner type</em> you select a grouping that entails a certain field selection.</td>
<td>In the IMG you can amend the field selection for the business partner type in question and also define your own business partner types, depending on the customer-specific requirements.</td>
</tr>
<tr>
<td></td>
<td>- When first creating a grouping, this field is on the initial screen and along with the data for control,</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- when you are changing or displaying data, the field is along with the data for control.</td>
<td></td>
</tr>
</tbody>
</table>

By selecting the screen titles you can call up the corresponding processing screens for data entry or for viewing.
### Name fields

The selection of name fields available depends on the business partner category. You can enter the following data:

- **Organization:**
  - Form of address, name, legal form, industry, legal entity

- **Person:**
  - Form of address, first and last name, name components (name affixes and academic titles)

- **Groups:**
  - Form of address, two names, partner group type (marriage, shared living arrangement)

The name fields that are relevant for each particular business partner category are pre-set. Changes can only be made through modification.

### Addresses

You can enter any number of addresses for each business partner. The standard address is always maintained on the Address screen.

If you want to create other addresses [Page 20], you can also assign address usage [Page 21] to these addresses.

You can define address types in Customizing and store proposals for a standard address type per role.
### Control data

The *business partner type* enables you to freely group business partners. The control function *Authorization group* means that only end-users with the appropriate authorization may edit business partners belonging to the authorization group.

In the *external partner number* field you can define business partner numbers from a legacy or operational system. With persons you can enter information on gender, marital status and other personal data. With organizations you can enter data on the foundation and liquidation.

In Customizing you can define business partner types and default values for amending fields to suit the business partner type.

### Bank details

You can enter bank details for a business partner. You can take over bank master data from an external system with the help of transfer programs.

### Payment cards

You can enter payment cards for a business partner. In the IMG you can maintain payment card type, payment card category and payment card blocks.

### Notes on BP

You can store notes on every business partner. The areas of sales, accounting and marketing are included in the standard delivery. Other subject areas can be freely defined.

To define note types go to the menu *Tools → Word processing → Settings*. Select *Change text objects and IDs* and place the cursor on BUT000. In the menu select *Text ID → Create* and enter a new note type.

### Relationships

In the *Relationships* screen you create or edit relationships.
Addresses

Use

You can create one or more addresses for each business partner. If you create multiple addresses, you can define when they should be used (for example, use of a certain address as the delivery address).

Features

If you only require one address for each business partner, you can use the standard address fields in the Address processing screen. This address will be used for all activities.

If you require several addresses for a business partner, you enter the standard address in the Address processing screen and then select Address overview to enter other addresses. You have the following customizing and assignment options to help you manage several addresses:

1. In addition to the standard address you require addresses for certain transactions. For example, with a business partner you want to send letters to a different address to the one used for deliveries.

   In Customizing you have to define the address types Correspondence address and Delivery address.

   You assign the address to which letters should be sent to the address type Correspondence address, and the address to which deliveries should be sent to the address type Delivery address.

   If several addresses are assigned to an address type, you can assign the attribute Standard use to the address to which correspondence should normally be sent. The field selection that appears only includes addresses of this address type.

Example

If a business partner has five addresses, of which three are correspondence addresses, only the three correspondence addresses appear in the selection of correspondence addresses.

   In Customizing you define whether several addresses may be assigned to an address type.

2. If a BP role suggests that one address type will be used the most, you can use the Customizing feature to assign an address type as the standard address type to a BP role. For example, it may make sense to assign the address type Delivery address as the standard address type to the BP role Goods recipient.
Creating Other Addresses

Prerequisites
You are in the Address processing screen in Create or Change mode.

Procedure
1. Choose Address overview.
   The Address overview frame appears.
2. Choose Create.
   The processing screen for entering address data appears.
3. After you have entered the address, choose Back.
4. Enter another address or choose Back.

Result
You have created one or more addresses.
Assigning Address Usage

Prerequisites

You must have already created several addresses.

Procedure

1. In the Address processing screen select Address overview and then Address usage.
   The Address usage processing screen appears.
2. Select an address type (for example, delivery address) and then choose Create usage.
3. Select the corresponding address in the dialog box.
   You have assigned an address to a usage.
4. If you have assigned several addresses to an address type, the first address entered is
   marked as being the standard usage.
   
   If you wish to define a different address as the standard usage for an address type,
   select the desired address and choose Standard usage.
   
   The indicator Standard usage appears after the address chosen.
Bank Details

Use
You can enter any number of bank details for each business partner.

Integration
Bank master data can imported to the database from an external data medium with the aid of read programs. (See IMG: Financial Accounting → Bank Accounting → Bank Accounts → Transfer Data to Bank Directory).

Prerequisites
The corresponding fields have been assigned to the BP role.

Features
With the help of bank data you can uniquely identify the bank and the account in the system.
If the bank referred to does not yet exist in the system, create this with the bank details.
Payment Cards

Use
You can enter any number of payment cards for each business partner. You can create a payment card for one or several persons.

Integration
You may have to maintain payment card type, payment card category and payment card blocks in the IMG. (SAP- Business Partner → Business Partner → Basic Settings → Payment Cards)

Prerequisites
The corresponding fields have been assigned to the BP role.

Features
As the payment card ID enter a key with which card data on a business partner can be uniquely identified.

Under payment card type enter the name of the card or the name of the card company (for example, VISA). A checking rule has been defined for the card companies included in the standard delivery. This checks the number of the card for each card company.

The card number is the term for the account number on the payment card.
Business Partner Relationship (BP Relationship)

Definition
A BP relationship forms a business-relevant connection between two distinct business partners.

Use
You can assign a relationship category to two business partners. If a relationship category is assigned to business partners, the business partners are said to have this relationship.
Attributes can be assigned to a relationship, meaning that redundant data retention is avoided.

Example
If a business partner is both the purchasing manager of company A and also the MRP controller of company B, the attributes that this business partner has as purchasing manager and as MRP controller (such as department, function, power of attorney) can be defined in the relevant relationships. If this was not possible, the business partner would have to be created twice so that the relevant data could be assigned uniquely to the particular relationship.

Structure
You can limit a relationship in time by entering the start date and end date of the relationship. This means that it is possible to get an overview of the periods in which certain business partners were contact persons for a company, for example.
Creating Relationships (Integrated Maintenance)

Prerequisites
The business partner for whom you want to create the relationship must already exist in the system.

Procedure
1. When you want to create or change a business partner, select the screen title Relationships.
2. Choose Continue.
   The Relationships processing screen appears.
3. Select BP Relationships and choose Create.
4. In the dialog box, enter the relationship category and the number of business partner 2. You can also limit the relationship in time.
5. Choose Continue.
6. If you want to create other relationships, position the cursor on
   a. BP Relationships, to create a relationship to a relationship category that has not yet been created
   b. a relationship category that has already been created, if you want to create another relationship to this category.
7. Choose Create.

Result
You have created one or several relationships.
Creating Relationships (Independent Maintenance)

Procedure

If you want to create a relationship, take the following steps:

8. In the initial screen you can make a preselection of the relationship/s you want to create, by specifying the relationship category/categories, business partner 1 and 2, and the validity dates. In addition, you can choose whether you want other differentiations to be displayed, if this function is maintained for the relationship category.

   It is a good idea to specify the relationship category in the initial screen, if you want to create several relationships belonging to the same category. If you want to maintain several relationships for a business partner, select the business partner first.

9. Choose Execute.

10. Enter the necessary data for the relationship, and maintain the detailed data, if required.

   From relationship maintenance, you can create, display or change a business partner. To create a business partner, choose Environment → Create business partner. Save the business partner data, and return to relationship maintenance by choosing Back.

11. Choose Save. You can now create other relationships.

Result

You have created one or several relationships.
Changing Relationships (Integrated Maintenance)

Procedure
12. When you want to create or change a business partner, select the screen title Relationships.
13. Choose Continue.
   The Relationships processing screen appears.
14. Position the mouse pointer on the relationship that you want to process, and choose:
   - Select, to process detailed data on the relationship.
   - Change validity, to change the start date or end date of a relationship.
   - Delete, to delete the relationship.

Result
You have changed one or several relationships.
**Changing Relationships (Independent Maintenance)**

### Prerequisites
Before you can change relationships, you must have already created business partners and relationships.

### Procedure
1. Choose *Relationship* → *Change*.
2. In the initial screen, you can make a preselection of the relationship/s that you want to change, by specifying a search strategy, relationship category, business partner 1 or 2, validity key data and sorting sequence.
3. Choose *Execute*.

   If you do not enter any details, you get an overview of relationships (maximum of 500 relationships), from which you can choose the desired relationship by drilling down the hierarchy.

4. Position the mouse pointer on the node that you want to process, and choose:
   - To change the validity: *Edit* → *Change validity*
   - To delete the relationship: *Edit* → *Delete*
   - To create a relationship that is identical to a relationship that already exists: *Edit* → *Copy*.

   If you want to edit several relationships at the same time, position the mouse pointer on the corresponding relationship and choose Select. This allows you to make the desired change to all the relationships selected, in one activity.

   When you are in relationship maintenance, it is also possible to create a new relationship. The data from the node that you have selected is taken as default.

### Result
You have changed one or several relationships.
Relationship Category

Definition
Relationship categories reflect business-relevant links between business partners.

Use
With the help of relationship categories you can define temporary contact persons and contact persons for a company as well as certain data on members of a shared living arrangement or marriage. The latter might be necessary for liability reasons.

Relationships is the term used if a relationship category contains information on concrete business partners.

The relationship categories that can be selected depend on the business partner category and on the BP role.

The standard relationship categories are:
- is contact person for
- is married to
- is temporary contact person for
- belongs to a shared living arrangement
- is identical to

Structure
With the help of field groupings in Customizing you can hide or display fields.

An extension [Page 37] of the relationship categories to include attributes is possible. You can also define other relationship categories. For more information, see the Business Data Toolset [Ext].
Relationship Category “Is Contact Person For”

Definition
This relationship category denotes the status as intermediary through whom business contacts are maintained.

Use
The relationship category is contact person for links a business partner with the BP role contact person with a business partner of the category “Organization”.

Integration
To be able to create a relationship category is contact person for, you must first create a business partner in this BP role.
Relationship Category “Is Married To”

Definition
The relationship category is married to denotes the conjugal partnership of two business partners.

Use
The relationship category is married to links two business partners of the category “natural person”. You may want to define this relationship for liability reasons, or you may just wish to obtain an overview of the contracts that the marriage partners have with a company.

Integration
With the relationship category is married to, a check is made that the two business partners are of a different sex. If this is not the case, the system issues a warning but still accepts the entry.

In the case of the relationship category is married to, the system does not check whether an entry has been made in the marital status field in the master data.
Relationship Category “Is Activity Partner For”

Definition

This relationship category denotes the status as intermediary through whom business contacts are maintained, whereby these contacts are strictly limited in time.

Use

The relationship category is activity partner for links a person, organization or group with a business partner.

For example, a business partner already has a contact person but announces the name of a second person who represents his/her interests in certain isolated cases. This person can be entered in the system by using the relationship category is activity partner for.
Rel. Cat. “Belongs To A Shared Living Arrangement”

**Definition**
This relationship category denotes the status of a business partner as member of a shared living arrangement.

**Use**
The relationship category *belongs to a shared living arrangement* is used, for example, if you want to store data on the individual members of a shared living arrangement for liability reasons.

**Integration**
Before you can create a relationship category *belongs to a shared living arrangement*, you must first create a business partner of the category *Group*. 
Relationship Category "Is Identical To"

Definition
The relationship category is identical to denotes an alias.

Use
If you suspect that a business partner has been created twice in the system under different names or with different data, you can create the relationship is identical to, and use this until the identity or the data records have been clarified.
Relationship Category "Is Shareholder Of"

Definition
A business partner holding a shareholding interest in a company either on the basis of an agreement or upon having purchased shares.

Use
If you want to map the relationship between a shareholder and a company, choose the relationship category is shareholder of.

Integration
You must have created a business partner as an organization, person or group, and a different business partner as an organization.
Central Relationship Data

Use

Using control tables, you specify whether attributes can be maintained for the relationship category.

To date, attributes can be maintained with the contact partner relationship and shareholder relationship.

Contact person relationship

<table>
<thead>
<tr>
<th>Frame on screen:</th>
<th>Description:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relationship category: General data</td>
<td>You can specify a VIP indicator for the business partner. You can also enter data on the department, function, and power of attorney of the business partner, plus free text as a comment.</td>
</tr>
<tr>
<td>Relationship category: Address data</td>
<td>In addition to telephone and fax numbers, and email address, you can also specify address details such as company department and name of function. If a company address is maintained, you can assign this by choosing Assign company address.</td>
</tr>
</tbody>
</table>

Shareholder relationship

<table>
<thead>
<tr>
<th>Frame on screen:</th>
<th>Description:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shareholding data</td>
<td>You can specify the shareholding percentage as well as the actual amount, together with the currency. With the Control indicator you can state whether it is a controlling interest on the basis of a controlling agreement or key shareholding. A controlling interest is not strictly limited to one business partner. For example, if two business partners each hold an interest of 50%, both can have a controlling interest.</td>
</tr>
</tbody>
</table>

If you have specified an own relationship category (see Extensibility [Page 37]), you can define an attribute maintenance for this relationship category.
Extensibility

Use

SAP Business Partner is designed to enable you to make extensions, as the screen structure and the screen sequences are defined in control tables. Program logic can be integrated by way of firmly defined interfaces.

Prerequisites

Features

1. BP role:
   a. Extension by way of attributes:
      BP roles can be extended to include attributes.
      If you wish to make customer-specific evaluations or enter additional information on a business partner, you can add fields to existing BP roles in an existing screen or in a separate screen:
   b. Extension to include BP roles:
      An extension of BP roles is also permitted.
      Extensions should only be made by developers with ABAP/4 experience and only if specific customer applications have been programmed.
      Adding new BP roles only makes sense if a customer-specific development is being conducted. The business partner data required for this application can be composed of data supplied by SAP as well as customer-specific data.
      If no BP role-specific data is required, you should first check whether the required functionality could be presented with the help of the BP role Business partner (general).
      For detailed information on the extension to include new BP roles see Business Data Toolset [Ext].

2. Relationships:
   a. Extension by way of attributes:
      Relationships can be extended by way of attributes.
   b. Extension by way of relationship categories:
      You can create new relationship categories. Examples of relationships:
      Is a member of (club)
      Is an employee of (business partner company)
      Is the son/daughter of
      Is the managing director of
      Is guarantor for
      Is guardian of
You should define own relationships analogously to own BP roles.
Data Transfer

Use

Automatic data transfer from a legacy or operational system is possible (see also External Data Transfer [Ext.]).

Look in the IMG for further information and the application programs. See Cross-Application Components → SAP-Business Partner → External Data Transfer.