PUBLIC
SAP Cloud for Customer
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Solution Guide for SAP Sales Cloud

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Content

1 Solution Guide for SAP Sales Cloud

Sales people need a robust set of capabilities to engage in meaningful customer conversations and deliver the right impact every time. Going beyond the traditional approach, SAP Sales Cloud provides delightful user experience and equips your sales team to close more deals faster in today's complex selling environment.

This guide helps you accomplish your daily tasks by providing information about setting up and using the capabilities in SAP Sales Cloud.

For new business in business-to-business (B2B) selling, the solution enables you to capture Leads [page 244] and qualify and convert them into Opportunities [page 299]. These opportunities can be further nurtured and evaluated with comprehensive customer information, phase-relevant activities, and competitive data until they are ready to go into the quotation process. Once Sales Quotes [page 429] are accepted, you can create Sales Orders [page 513] that can be further processed in the back office. In the meantime, sales representatives can forecast their potential deals and compare against their quotas at an ongoing basis using Sales Forecasting [page 1100].

For field sales and trade scenarios, the solution allows you to plan Visits [page 638] and Activities [page 599]. During the visits, sales representatives are empowered with 360-degree view of customer information, tasks and Surveys [page 769] that need to be performed, and Promotions [page 862] relevant for the visits. Sales representatives can also take orders on the field and leverage (Deprecated) Imaging Intelligence [page 699] for planogram compliance. This can be executed both online and offline. For in-store visits, you can create engagement maps and your own KPIs to evaluate business metrics per store using the Perfect Store [page 713].

For more information about initial setup of your system, setting up the solution on mobile devices, integrating analytics, and customizing the solution to your needs, see the appropriate guide on the SAP Cloud for Customer page on the SAP Help Portal.

2 Common Tasks

Learn how the common tasks such as search, navigation menu, feeds, calendar, side pane, dashboard, and so on, work in the solution.

Knowing how to navigate around the solution with the visible elements that you see and interact with is critical in managing your data in the solution.

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> Learn about using the feed that allows you to quickly communicate and collaborate with your network.

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> Learn about the various search functions in the solution.

Notification [page 69]
> Notifications are a way to let you know that something new has happened so you don't miss anything that might be worth your attention.

Map [page 69]
> Learn how to use the map feature based on Google maps or alternatively AutoNavi maps, that provides data with an interactive map in different objects.

Support and Help [page 74]
> Learn about creating incidents to report issues encountered in the solution.

Side Pane [page 90]
> The side pane appears on the right side of the main content.

Personalization [page 91]
> Learn how to personalize the solution settings to suit your needs.

2.1   Navigation Menu

A navigation menu provides easy access to the core functionalities and makes browsing easier by providing a main menu of options.

By default, the navigation menu has a hierarchical structure with a main level and a sublevel. You can view the navigation menu in a flat design and see all the objects at the same level. With flat design, you can navigate quickly and easily. Please ask your administrator to enable the flat design.

2.1.1 Flat Design Navigation Menu

A flat design navigation menu shows all objects at the same level.

You avoid additional clicks and can quickly find and navigate to the desired object. For example, for a sales user, all the objects such as leads, opportunities, and so on, show up at the same level in the navigation menu.

> ! Restriction
>
> A semi collapsed view of the navigation menu is available only on tablets.

Your administrator can enable flat navigation menu by selecting the checkbox *Enable Flat List Navigation Menu in Fiori Client* in the Company Settings screen. Once turned on, the setting affects all users.

> **i Note**
>
> Some work center views like Target Group are assigned to multiple work centers and hence might appear twice. Please check the work center view assigned to the business role.

2.1.2 Semi-Collapsed Navigation Menu on Desktop in Fiori Client

Under flat navigation, your administrator can also enable semi-collapsed navigation on desktop.

With semi-collapsed navigation, you can quickly launch object lists without opening or closing the navigation menu.

> **i Note**
>
> Semi-Collapsed navigation for Tablets is already supported.

Semi-collapsed navigation for desktop is enabled by going to ❯ *Adapt* ❯ *Company Settings* ❯ and selecting the checkbox *Enable Semi-Collapsed Navigation Menu on Desktop in Fiori Client*. Ensure that hide navigation menu setting isn't selected and flat navigation is enabled.

2.1.3 New Navigation Menu

The new navigation menu is the only menu option available in the solution. The old navigation menu has been retired.

The new navigation menu is available in the semicollapsed mode upon sign-in. The new navigation menu provides consistent user experience across all SAP C/4HANA products.

The new navigation menu provides following modes:

- Flat navigation menu in contrast to hierarchy navigation menu.
- Semicollapsed navigation menu in contrast to expanded navigation menu.

The administrator can enable the feature from the user profile menu under ❯ *Settings* ❯ *Company Settings* ❯, by turning on the toggle button for the company setting. *Enable Semi-Collapsed Navigation menu upon Sign-in.*

The administrator can also turn on the company setting *Enable Flat List Navigation Menu*. Flat Navigation is useful for business users who don't have too many work centers or views assigned to them. Disabling this company setting turns on hierarchical navigation menu. Hierarchical navigation is recommended for administrators who have many work centers assigned.

Automation IDs Supported in Tab Navigation Bar

The new tab navigation bar supports automation IDs. Automation ID is used to locate an element and uniquely identifies an element or tab from the other tabs. Automation ID is useful when you want to find a specific user interface element among other elements. For example, it's useful when you want to find a specific item in a collection.

> ⚠ Caution
>
> Any automation scripts that follow the click to navigate action, must be adjusted.

2.2 Recent History

Learn to quickly access your recently opened objects with recent history.

Get a more streamlined experience in finding and retrieving recently accessed objects in the different work centers with the *Recent History* tab in the navigation menu. Recent history records all the recent objects opened by you and displays it in a single list for quick access. Recent history tracks all the standard and custom objects, and objects opened in offline mode. You can choose to see all objects or filter by specific object.

> ⓘ Note
>
> - Recent history displays up to 20 interactions for each object type.
> - Recent history list is not synchronized across devices. For example, the recent history list that you access in your tablet is different from the recent history list on your desktop.
> - Recent history objects list is available in offline too. However, if the object is not synchronized for offline access, then you get an exception error if you open it. For example, a ticket in the recent history list, that is not synchronized for offline access, gives an exception error when you try to open it in offline.
> - Recent history is stored in the local storage. To delete it, please refer to your specific browser about how to clear the local storage. In case the app is used, uninstalling the app removes all items stored in the recent history.

2.3 Quick View

Quick view displays a concise overview of an object, providing a way to get information quickly without needing to navigate away from the current screen.

Quick View

You can see the quick view by hovering over the hyperlink associated with an object. The quick view is available as default in the application. If you don't like it, you can ask your administrator to disable it under company settings.

The quick view shows the object name and icon, the name of the work center, and the object ID. Actions like, *Favorite*, *Flag*, *Follow*, and *Close* are available. You can see the overview details for the object. You also see the tags belonging to the object. You can add tags and view more tags by clicking on the link. All information on the quick view display is from the information associated with the object itself. If any information/details change, the quick view display also reflects the change.

New Quick View (Desktop only)

You have a new quick view available for objects in Fiori client. In the earlier quick view, you could access the quick view by hovering over the object. You could see the important details and related information without navigating away. Or, quickly switch to a new item from the quick view. The new quick view is available only when enabled by the administrator. When enabled, you can launch the quick view on the side, by clicking the object instead of hovering over the object.

In the new quick view, you can see important details about the object, edit any specific field, or perform object-level actions, without navigating to the detail view. Inline edit is also supported on browsers in desktops and laptops.

The key benefit is improved user experience by reducing the number of clicks and time required to open object detail for quick changes. Your administrator can enable the new quick view under ▶ *Settings* ❯ *Company Settings* ❯, by turning on the toggle button for the company setting *Enable New Quick View in Fiori Client*.

- You can see the new quick view on the right when you click an object.
- Action toolbar includes object type, actions, open detail view action, and close action.

> **i Note**
>
> - The new quick view level actions are grouped under Actions. And, once the main action is defined, then Actions word gets replaced with "..." and main action is available separately outside the dropdown. Rest of the actions are available under "....".
> - Please keep the following things in mind when you try to either hide or move primary title using KUT-
>   - Don't hide the primary title as the open object detail icon is linked to it. If you hide the primary title, the open object detail icon is also hidden.
>   - If the primary title is moved, another field must be assigned as the primary title. The new field assigned should always be a link.
>   - The navigation from the primary title link and object detail icon opens on the same landing page. For example, if owner is the primary field link and you click on it, it navigates to the employee details page. And, the show object detail icon also leads to the employee details page.

- The header consists of a primary title (navigational link), which when clicked opens the object detail view. You see up to 3 primary field and up to 2 secondary field.
- The New quick view is restricted to show seven tabs on the user interface. SAP or the administrator configures the first seven tabs that show up in the new quick view.
- The Actions button is not visible if all the actions within the action menu are hidden.
- New quick view header doesn't show favicons in the header.
- You can see images for business partners in the new quick view header. If an image is not available for individuals (contact, employee, individual accounts), you see initials. If an image is no available for the organization, you see an object icon.
- In the notes tab, you see the initials, name of the person who wrote the note, time when the note was written. Depending on the authorization, you can see the actions icon.

> **i Note**
>
> The note history visualization in the notes tab is different from the note history visualization in object detail view.

- The section area for each tab is used to show object information, or lists, or notes. Lists are shown only in predelivered chunk view format and don't support tabular visualization.

There are two different visualization patterns available for the new quick view:

- **Pattern 1**- In pattern 1 visualization,
  1. There's a primary title (navigable link) and up to three primary fields (depending on the configuration).
  2. Up to two secondary fields (depending on the configuration)
  3. A numeric value on the right. In the screenshot below, it's the deal score 85
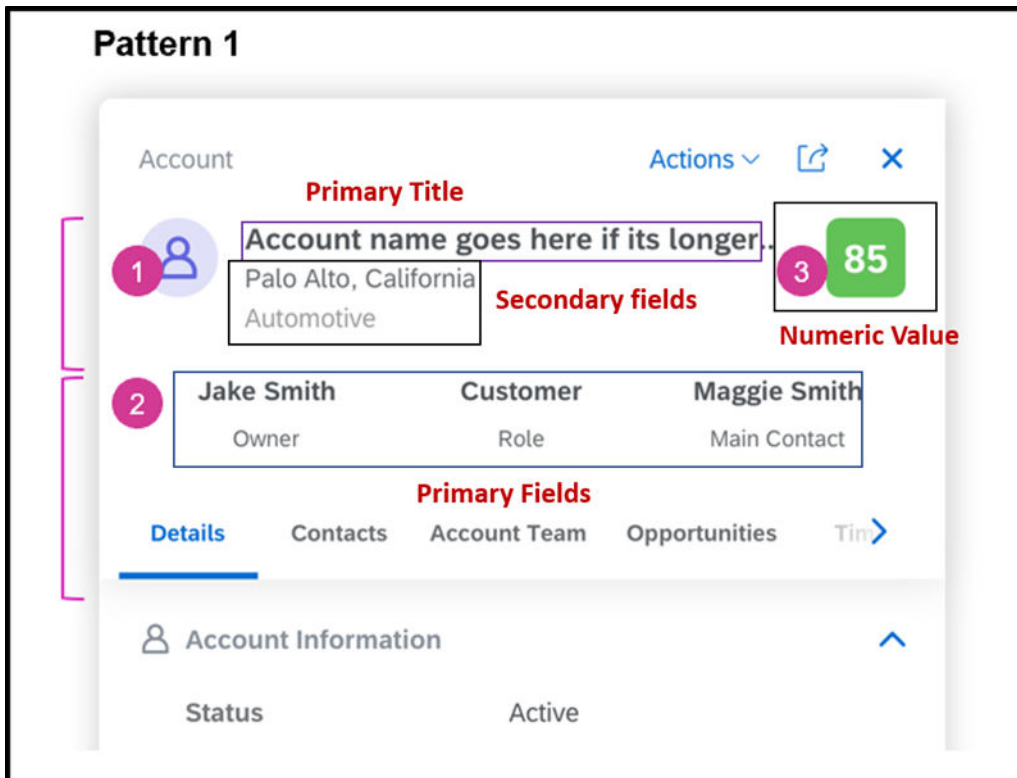
- **Pattern 2** - In pattern 2 visualization,
  1. There's a primary title (navigable link) and up to two primary fields (depending on the configuration).
  2. Up to two secondary fields (depending on the configuration)
  3. An additional text on the right. In the screenshot below, it's the status text **Open**
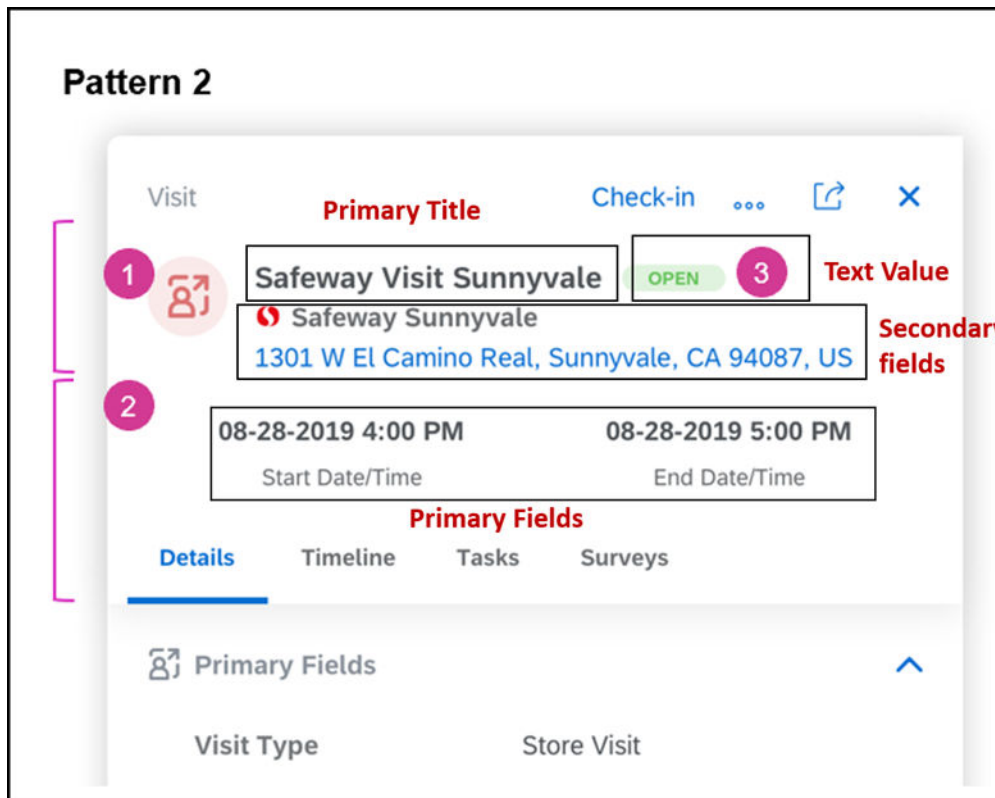
i Note

- New quick view is available in many objects. However, for objects where it's currently not enabled, the old quick view is available.
- When the new quick view is enabled, then the old quick view isn't available for custom objects. And, clicking on a custom object opens the object detail screen.

! Restriction

- Flag, favorites, and tags aren't supported in the new quick view.
- Embedded Components aren't enabled in the header fields. However, you can see them below the header field list.
- New quick view doesn't support embedded component. It isn't a limitation but intentionally done for an effective UI experience with the quick view. Complex embedded components can destroy the layout, for example, having multiple columns etc. Also, based on the complex nature of the embedded components, there's a high possibility to have an impact on performance.
- Adding mashup and reports is disabled for new quick view.
- New quick view isn't available in offline mode.

List of Objects That Support the New Quick View

	Object	Path
1	Opportunity	Sales → Opportunity
2	Sales Quote	Sales → Sales Quotes

	Object	Path
3	Sales Order	Sales → Sales Orders
4	Leads	Sales → Leads
5	Employees	People → Employees
6	Accounts	Customer → Accounts
7	Contacts	Customer → Contacts
8	Individual Customers	Customer → Individual Customers
9	Appointments	Activities → Appointments
10	E-Mails	Activities → E-Mails
11	Phone Calls	Activities → Phone Calls
12	Tasks	Activities → Tasks
13	Visits	Visits → Visits
14	Competitors	Competitors → Competitors
15	Competitor Products	Competitors → Competitor Products
16	Products	Products → Product Administration Products → Products
17	Contracts	Contracts → Contracts
18	Tickets	Service → Ticket
19	Chats	Activities → Chats
20	Memo	Activities → Memo
21	Installed Base	Installed Base → Installed Base
22	Installation Points	Installed Base → Installation Points
23	Registered Products	Product → Registered Products Installed Base → Registered Products
24	Assignments	Resource Scheduler → Assignments
25	Maintenance Plans	Installed Base → Maintenance Plans
26	Stock	Stock
27	Time Entry	Time Recording → Time Entries
28	Time Report	Time Recording → Time Reports
29	Social Media Message	Service → Social Media Messages
30	Partner	Partner → Partner
31	Partner Contact	Partner → Partner Contact
32	Product Lists	Product → Product Lists
33	Org Structures	Administrator → General Settings → Org Structures
34	Premise	Utilities → Premise

	Object	Path
35	Contract Account	Utilities → Contract Account
36	Sales POD	Utilities → Sales POD
37	Promotion	Sales Campaign → Promotion

Scope of key user tools for the new quick view-

- Adding new tabs
- Adding new sections to tabs
- Adding extension fields (to sections on the views as well as to the new quick view header)
- Adding PSM fields from underlying main business object (to sections on the views as well as to the new quick view header)
- Adding HTML formatted explanation texts to existing tabs
- Reorder tabs
- Reorder panes of a view
- Reorder fields (in sections of views as well as in the new quick view header)
- Reorder columns (if there are tables or chunk views modeled on a new quick view)
- Move fields across sections and facets
- Move fields from sections to header region and vice versa
- Show/hide fields, columns, buttons
- Set fields and column invisible, read-only, mandatory in master layout, as per key user rule and dependent on a page layout
- Sort and group lists
- Set of visible rows to lists
- Set display mode and sort order of code list fields

2.4   Library

Use the library to organize documents using folders. You can set authorizations for folders and documents and share deep links when referring content.

2.4.1 Enable Library with Folder Structures

Before users can organize documents using folders, administrators must enable the new library and migrate all the content from the existing library.

Procedure

1. Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯.
2. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Communication and Information Exchange* ❯ *People Collaboration, Intranet and External Services* ❯ *Communities, Document Management and External Services* ❯ and select the scoping question: *Do you want to enable library where you can organize documents using a folder structure?*
3. Assign the *Library* work center view (ID: *COD_LIBRARY_WCVIEW*) to appropriate business users or roles.

   For more details, please check Create Business Roles and Assign Work Centers and Views.
4. Go to the *(New) Library* work center, from the actions at the bottom right, click *Migrate Documents from Library*. A background job is scheduled at the back end to migrate all the documents from the existing library.

   The background job is triggered every four hours. Depending on the volume of the documents to be migrated, the time required to complete the migration varies.

Next Steps

Once the migration completes, you can disable the existing library work center view (ID: *COD_MARKETINGINFO*) for applicable business users or roles.

> → Tip
>
> After the old library is removed from the project scope, it is recommended that you trigger the migration in the new library once again, just in case users might have created new documents in the old library during migration.

2.4.2 Manage Access Restrictions for Library

Administrators can provide users with restricted access to the library using access context 2027. With this access context, read and write access to documents can be restricted based on sales organization, territory, and account.

This access restriction also applies to attachments added from the library. For documents added to the library and referenced in a business object such as an account, they are visible to all under the *Attachments* tab.

However, unauthorized users cannot navigate to further details. Restricted documents are not listed in the *Attachments* work center. Attachments from outside of the library are not subject to access restriction.

2.4.3 Organize Documents Using Folders

You can build up to three levels of folders to group documents in the new library. A breadcrumb trail allows you to keep track of your current location and easily navigate back to an upper level of folder in the hierarchy.
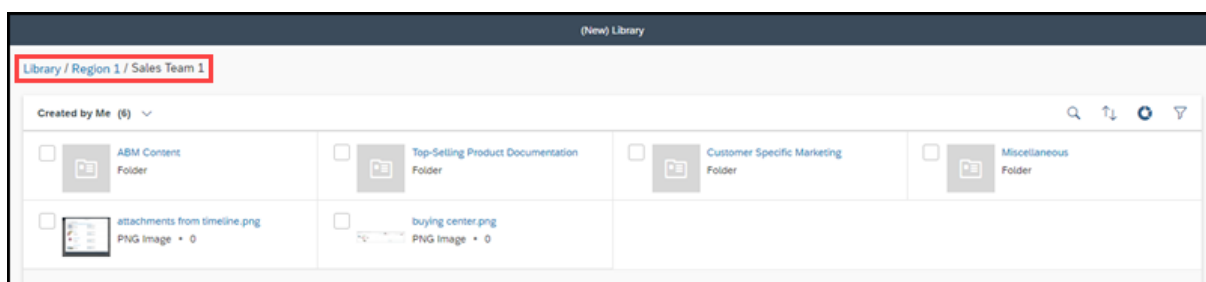
> **! Restriction**
>
> Pre-delivered views are only used to filter top-level documents and folders in the library. For example, if you switch the view from *Created by Me* to *Changed by Me* within a folder, you will be directed back to the top level in the library and see a list of top-level documents and folders that have been changed by you.

2.4.4 Manage Access to Folders and Documents

As the owner of a document or folder, you can define whether the document or folder is public or private. Access to a private document or folder can be restricted to specific sales data, accounts, employees, and territories.

In addition, you can authorize other employees to administer the document or folder by checking their *Grant User Access* fields.

Items that have access to a parent folder can access all the child folders and documents within the folder. Items with such *Inherited Access* cannot be edited or deleted.

> **i Note**
>
> You cannot change the administration right for an employee with inherited access. In a case like this, you must add the employee explicitly for editing.

Inherited access can also be granted due to access control that has been configured by your administrator.
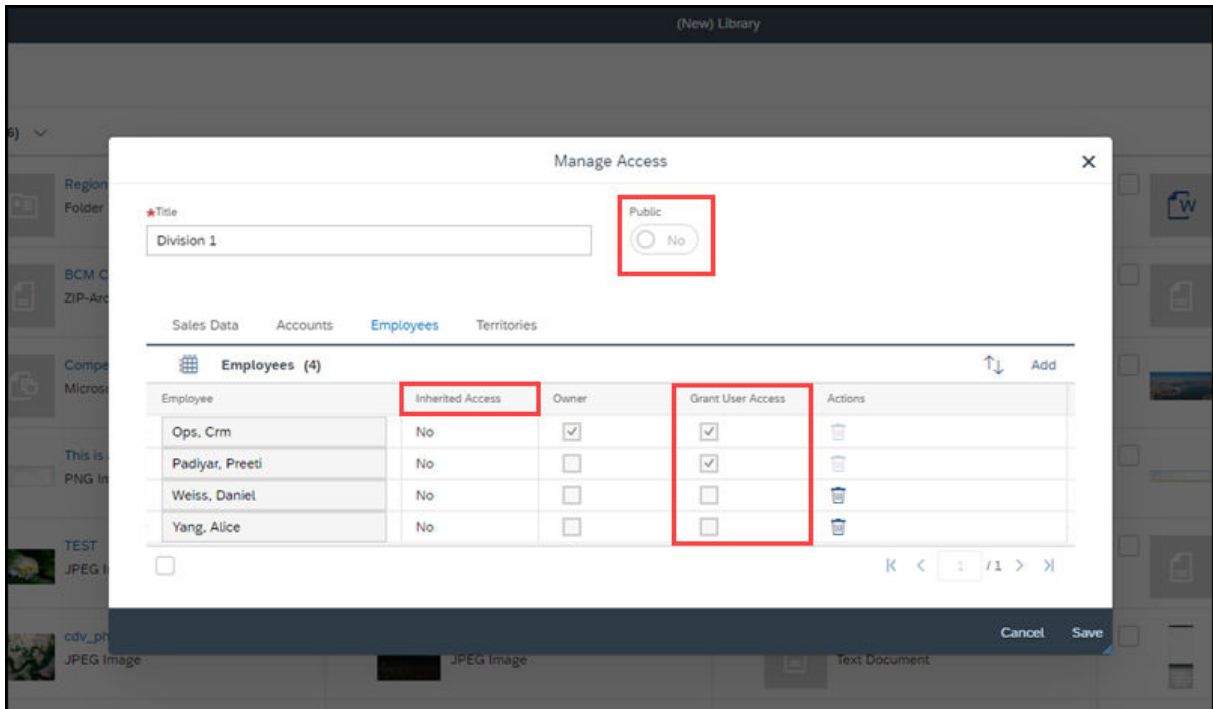
Related Information

[Configure Access Control and Restrictions for Business Roles](#)

2.4.5 Relocate Documents into Folders

Within the new library, you can organize documents using the *Move* action to place them into the right folders at any level in the hierarchy.

Context
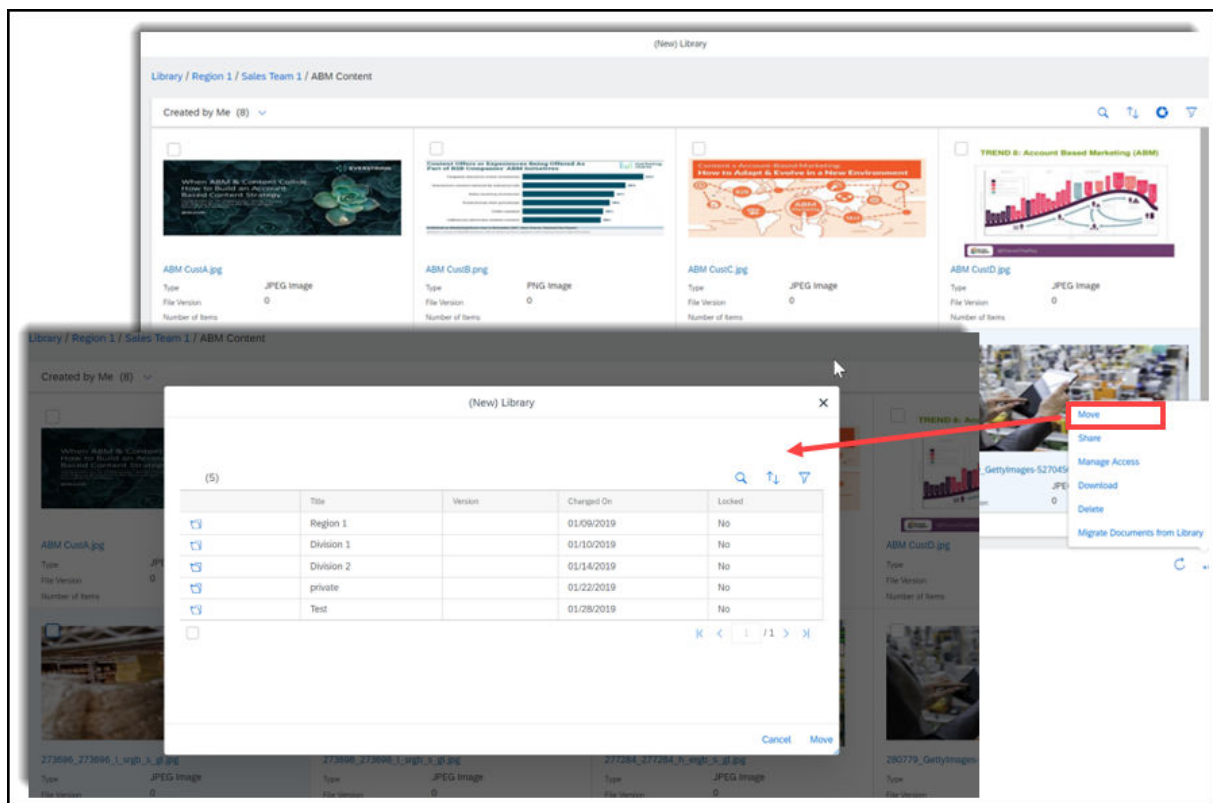
> ⚠ **Restriction**
>
> Only documents can be moved into a folder. You cannot move folders into a folder.

Procedure

1. Select one or multiple documents that you want to relocate.
2. From more actions at the bottom right, choose *Move*.
3. Click the folder icon or the row and navigate to the folder where you want to place the documents. Open that folder.

> **i Note**
>
> The first level that appears is the root level. If you want to move documents to the root level, you do not need to click any folder.

4. Click *Move*.
5. Refresh the list to see the result.

2.4.6 Upload Documents to Folders Using Drag-and-Drop

You can place documents directly into folders from your client device using drag-and-drop. You can only upload documents into a folder that is currently open. Up to five documents can be uploaded in a single drag-and-drop action.

> **→ Tip**
>
> To trigger the upload, you must drop the documents into the list area. The list area is highlighted in red in the screenshot below.
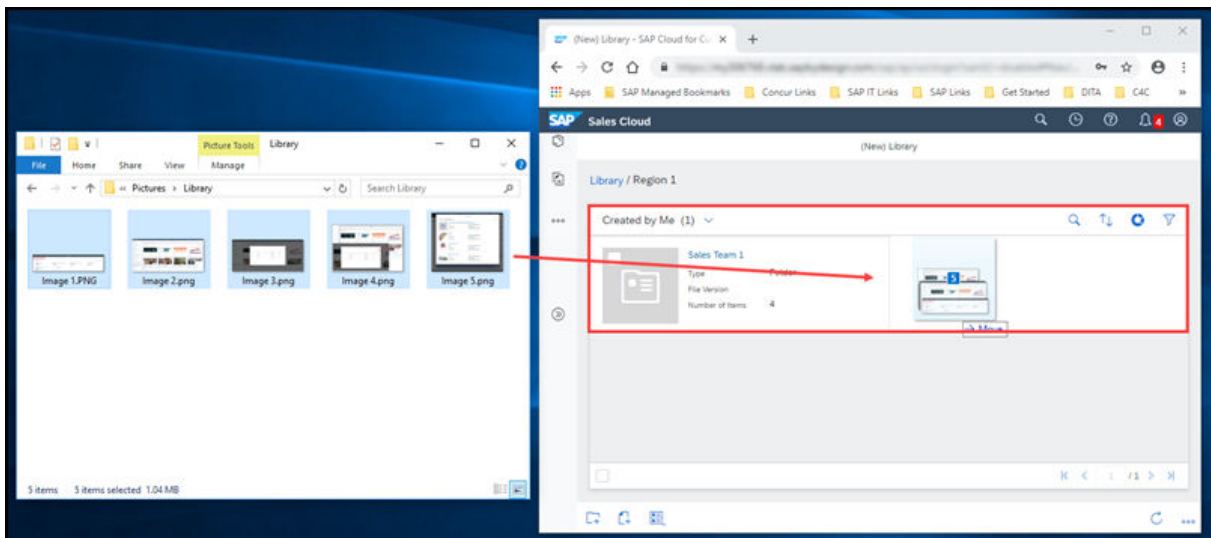
> **i Note**
>
> Due to an internal restriction, you cannot upload a document if another document in the library has the same name. As a work around, you can upload your document with a different name, and later edit the title.

2.4.7 Share Deep Links to Folders and Documents

You can share deep links to folders or documents with colleagues when referring to content.

When you open a shared link to a private folder or document, you must have permission to access the folder or document before you can see the content.
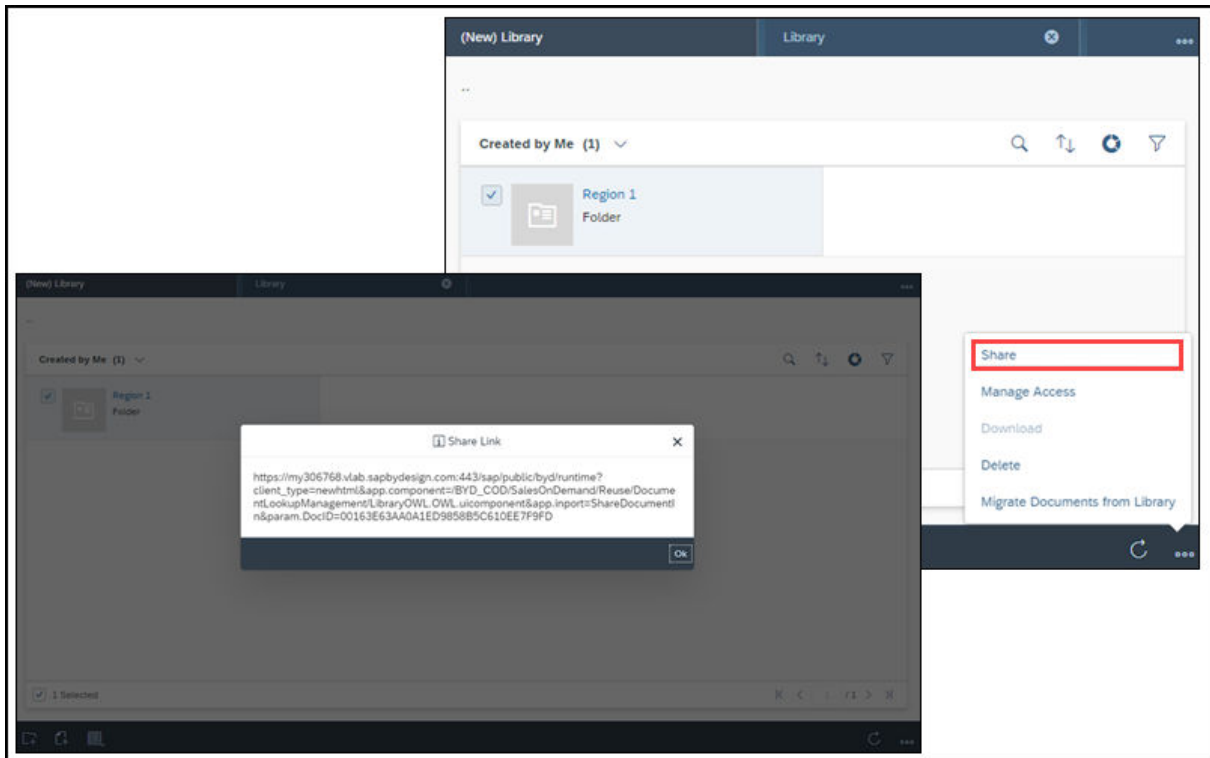
> **!** Restriction
>
> Please be aware of the following known limitations when you open a shared link to a folder:
>
> - You see the action bar located at the top instead of the bottom.
> - The content within the shared folder displays under your default view.

2.5 Attachment Search

View and download attachments that have been uploaded to your system.

- Use default query sets for *Last Week's Attachments*, *Last Month's Attachments*, *My Attachments*, *My Teams' Attachments*, and *All* to filter attachments results.
- Users can utilize default sets of Last Month's and Last Week's Attachments to quickly see attachment results.
- Navigate (from the search screen) to the target business object.
- Sort the search results set in ascending or descending by standard criteria and the appropriate data appears in the search results table.
- Use action - *Download* to download a single file. You can also select multiple files for download. This downloads a compressed zip file containing the selected files.
- Use action - *Refresh* to update the *Attachments* work center view with any changes that you have made to the attachments in the business objects.

- Use the same access restrictions maintained for specific business object to allow or restrict access to attachments.

- Delete an attachment from a business object and this also deletes the document from the list in the *Attachments* work center view. Similarly you will find that any corresponding actions that you perform for a business object (such as create or edit) will be updated in the *Attachments* work center view.
- The maximum number of results per result set is restricted to 5000.

Request Bulk Attachment Downloads [page 35]
> Request a bulk attachment download and download the attachments from the attachment download monitor.

Search Attachments [page 36]
> Search for specific items that have been uploaded to your system.

Use Attachment Search for Custom Objects [page 36]
> Search for attachments that are a part of custom business objects.

2.5.1 Request Bulk Attachment Downloads

Request a bulk attachment download and download the attachments from the attachment download monitor.

Context

If you have selected more than 100MB of attachments to download from your attachment search results, the attachments must be grouped into multiple smaller sets that are less than 100MB in size before you can download them. You'll create a bulk attachment download request that gets scheduled for grouping and made available for download. Each bulk attachment download request has its own ID and can be found in the attachment download monitor.

In the attachment download monitor, you can view your download requests, the download request status, view the expiration date and time, and download the requested attachments when they are ready. The attachments are only available to download for 24 hours after the download request is created. You can download and see only the download requests that you have requested.

> i Note
>
> You can only create two bulk attachment requests at a time. If you currently have two bulk attachment requests in your attachment download monitor, you must wait until one expires to create a new request.

Procedure

1. Select the attachments you want to download and choose ▶ *Actions* ❯ *Download* ▶. If the total size exceeds 100MB, a download request is scheduled.

2. Go to ▶ *Library* ❯ *Attachment Download Monitor* ▶ and locate the download request ID to view the status of the requested attachments.

3. Once the requested attachments are compressed with the status *Ready for Download*, you can download it. The attachment download monitor shows the expiration date and time at which your attachments are no longer available to download.

2.5.2 Search Attachments

Search for specific items that have been uploaded to your system.

Under ▐▶ *Library* ❯ *Attachments* ▐, search for attachments that are uploaded for various business objects. The current release supports the complete attachments search functionality for sales orders, accounts, sales quotes, opportunities, visits, appointments, activities, leads, sales campaigns, and e-mail business objects.

- Search for all documents for a business object
- Use advanced search to search using *Object ID/Type*, *Name*, *Accounts*, *Sales Organization*, *Distribution Channel*, *Uploaded On* (Attachment Date), *Uploaded By*, and *Attachment Format*.
- Use standard and extension fields for accounts to search using a specific account.
- Create and save personalized search queries with selected search criteria.

In the *Attachments* work center, use the dropdown menu for *Attachment Type* to filter your search results by an attachment type in your system.

2.5.3 Use Attachment Search for Custom Objects

Search for attachments that are a part of custom business objects.

If you have custom business objects in your system that contain attachments, these attachments can be included in the attachment search under ▐▶ *Library* ❯ *Attachments* ▐. Use the advanced filter to search for attachments based on a specific custom business object. Administrators can configure which custom business objects get included in the attachment search.

2.5.3.1 Configure Attachment Search for Custom Objects

Administrators can configure attachment search for customer objects with a fine-tuning activity.

Go to ▐▶ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▐▶ *Open Activity List* ❯ *Fine Tune* ❯ *Configure Business Objects for Attachment Search* ▐ to activate attachment search for your business objects.

You see the current, default business objects in the list. Use the *Active* checkbox to activate or deactivate the object for attachment search.

To add a custom business object to the list, you'll need to add a row for your custom object and define the following:

- Object Identifier - A unique identifier to identify this configuration. It should start with "Z".

- UI Path for Authorization Context - This Unique ID (taken from UI designer) of the UI component provides the authorization context for search. This OWL component can be a reused standard OWL of SAP if the custom business object derives the authorization context from it.
- Active - Indicator to activate or deactivate the custom business object from search.
- Description - Translatable description of the custom business object. This description appears in object dropdown box, in the advanced search for attachments.
- Properties - Use the Solution Explorer in PDI Studio to set the following properties:
  - Object Name - A valid name of the custom business object. It has a .bo file extension in the Solution Explorer.
  - Object Namespace - A valid namespace where the custom business object is defined. In can be found in the solution properties in the Solution Explorer..
  - Object Query Node Name - A valid node name on which the custom business object's query is defined. In the Solution Explorer, under your custom business object name, double-click the .qry file to retrieve the query node name.
  - Object Query Name - A valid query name defined on the custom business object. In the Solution Explorer, the object query name is under the object query node name.
  - Search Parameter Name Account ID - Optional - A valid data element path to the search parameter account ID defined in query.
  - Search Parameter Name Sales Organization ID - Optional - A valid data element path to the search parameter sales organization ID defined in query.
  - Search Parameter Name Distribution Channel - Optional - A valid data element path to the search parameter distribution channel. In the Solution Explorer, right-click on the .qry file and select Execute Query. In the window that opens, use Parameter dropdown menu.
  - Object Thing Type Name - A valid "Short_ID" value taken from UI designer that represents the thing type name of custom business object. It has a .TT file extension in the Solution Explorer.
  - Search Result Attribute ID - Optional - A valid data element path to the identifier of the business object that can be used to identify the business object in the search results. If this value is not maintained then UUID of the business object is shown in the search result. This attribute is used to help the user to uniquely identify the business object of the corresponding attachment. You can give any element maintained the custom business object. It is recommended to use the alternative key of the business object.

2.6 Lists

Learn how to work with different lists in the solution.

Lists are available in work center view and in detail view. At the work center level, the list is used to locate objects in the system such as accounts, opportunities, and leads. At object detail level, the list is used to locate list of items in an object. For example, the list of items in a sales quote.

> → Remember
>
> You can only open 25 tabs in the solution. However, if you want to open additional tabs, you can do so by closing some of the open tabs, so that the tab count doesn't exceed 25.

The toggle selection mode button to enter into multiselection mode has been removed. Selection checkboxes are always visible in multiselect lists for all table visualizations (table view, chunk view, image view, map view etc.). You can navigate to different objects directly from within the chunk view. With selection checkboxes, the selection of rows in a list becomes easier and you don't have to do an additional click to enable the selection of checkboxes.

> → Remember
>
> Multiselection checkbox isn't available in a single select list.

Auto Adjustment of Table Column Width

You don't have to expand or reduce the column widths in a table to see the complete table. The columns automatically adjust to the table size and shrink to minimize the white space. In case, the table is long, the columns shrink further by wrapping the header text. Thus, maintaining all the values on one screen. Whenever there's paging, sorting, or filtering of the columns, the width of the affected column is recalculated to auto adjusted. You can also manually adjust column widths to your requirement.

You can double-click the right border of a column header cell to resize. The column border expands to fit the longest value and when you click again it reverts to the original width.

> → Remember
>
> - When you are in edit mode, the minimum width of any column with editable controls increases to accommodate editing. However, empty and read-only columns remain to the minimum width size.
> - Column width changed made by you isn't saved. When you come back to a table again, you'll see the original column width.
>   Even when one column is changed, the complete table is impacted, and all the column sizes are redistributed.
> - This feature isn't supported on Microsoft Internet Explorer and Edge browser (version >16).

Dynamic resizing of the table columns can be done under company settings. You can enable the auto adjustment of table column under ▌ *Settings* ❯ *Company Settings* ▐ and turn on the toggle button option *Enable Auto Adjustment of Table Column Width in Fiori Client*.

Freeze First Column in Table

Column freeze feature allows you to keep the first column visible while scrolling horizontally through the right of the table. The first column is frozen to lock a specific column information in place. So, you can always see the important information without scrolling.

The administrator or end user can move the most important column in the list as a fist column by adaptation or personalization. First column freeze provides significant improvement in the user experience for lists having more than 6 or 7 columns.

> **i Note**
>
> - First column freeze is available only in desktop and tablets.
> - Column freeze isn't supported in the Internet Explorer.

As a prerequisite, your administrator must go to *Company Settings* and toggle on the button *Enable Column Freeze in Table*.

Learn all the different operations and actions you can do with an object worklist to access information quickly and easily.

Learn all the different operations and actions you can do with a list in detail view to access information quickly and easily.

2.6.1 Manage List in Work Center View

Learn all the different operations and actions you can do with an object worklist to access information quickly and easily.

- You can quickly create a new object by choosing the (+) icon at the bottom left of the object list. When you select an object in the object worklist, the relevant information of the selected object is displayed in a new tab.
- Basic search by key words, advanced search with more searching criteria, and sorting functions are supported for worklists.
- When enabled, multiselection checkbox is available as a column and always visible. For multiselect lists, checkboxes are always shown. For single select lists no checkboxes are shown. With this setting, you save an additional click to enable the multiselection checkboxes and the toggle action icon isn't available.
- You can resize the columns by dragging the separator line between the two columns in the column header.
- Clicking on the column header on each column opens the column header menu and is used to sort or filter a particular column. This menu contains the following actions:
  - Sort Ascending
  - Sort Descending
  - You have free text filter to do column search for multiple words. You can search list columns for multiple words at once. To do a multiple word search, separate each search word by a semicolon without any space. The search is an exact search when multiple search words are entered. However, if an asterisk (*) is used, it becomes a pattern-based search. For example, if you click the column header 'Name', and enter search words 'Joe*; Stin, it brings up all the records of names that begin with Joe

and record that contains Stin. When a single search word is entered, the search is a pattern-based search.

- Worklist can be displayed in different views. Table view is the default view for worklists and each row represents an object. Other views are chunk view, map view, image view, calendar view, and hierarchical table view.

> → Remember
>
> The smartphone doesn't feature the conventional table view. It displays the information in a type of chunk view or condensed chunk view as selected by the user.

Information About Other Views in Worklists

Chunk View:

Chunk view is useful for heterogeneous data types. The chunk view displays two rows of attribute values. Using the chunk view, you can display up to eight attribute values so that you don't scroll horizontally.

Each chunk view entry occupies an entire row. Objects can be further accessed when you click on the title hyperlink. The icon or thumbnail image indicates the type, object, or image of your choice. The title is the name of the corresponding object. It contains a hyperlink that, when clicked, takes you to the object overview.

> → Tip
>
> There are two types of chunk views - Chunk View for worklist and Chunk View for Side Panel (when available and enabled).

Chunk view is available in desktop, tablet & smartphone as an alternative view for the table/list views. For mouse-controlled devices like desktop, chunk view shows all navigation links. Whereas for touch-enabled devices like tablet & smartphone, only the first field is shown as a link. Hence, only one navigation is supported to reduce the number of tap areas and improve touch experience.

- Desktop and Tablet
  - The first nine fields from list view are shown in the new chunk view.
  - If the administrator adapts the list view (add columns, remove columns, or change sequence), the changes are also reflected in Chunk view.
  - If you personalize the list view (add columns, remove columns or change sequence) the changes are also reflected in chunk view.
- Smartphone
  - The first seven fields from list view are shown in the new chunk view.
  - If the administrator adapts the list view (add columns, remove columns, or change sequence), the changes are also reflected in Chunk view.

    > i Note
    >
    > The administrator can also use smartphone layout to specifically hide some fields in smartphone.

  - If you personalize the list view (add columns, remove columns or change sequence) the changes are also reflected in chunk view.
  - The default view for smartphone is the chunk view for better touch experience. You also have the option of condensed chunk view, showing lesser fields in smartphone.

- In touch-enabled devices, you can only navigate to the leading object. For example, for accounts you can go to the account name but can't navigate to the contacts under it.
- List view isn't supported in smartphone.

Image View:

> **→ Remember**
>
> Minimum size of the largest image uploaded and used for image view is 196px196px. The supported image file formats are PNG and JPG.

Image view provides information at a glance about objects where visual information is easier to consume. For example, products, people, and so on. Different image views are supported on any lists, where images are configured. There are three image view sizes supported:

- Large image view
- Medium image view
- Small image view

> **→ Remember**
>
> If the image is missing:
>
> - For people-related items, their initials are used.
> - The document type icon is used for documents (if the preview isn't available).
> - If no options are available, the object type icon is used.

Map View:

The map view is useful for objects that require geographical or location information. In the map view, you have a list on the left side that contains all the objects. The map covers rest of the screen and expands to the bottom and right of the available window. When you resize the screen, the map also resizes, but it doesn't zoom in or out. A map pin represents an item in the list on the map and when selected, highlights the pin.

- The following work center views are displayed in map view.
    - Accounts
    - Appointments
    - Installed Base
    - Registered Products
    - Route Planning
    - Tickets
    - Visits
    - Work Tickets

Calendar View:

There are different views available in the calendar, namely week view, work week view, day view, month view, and agenda view. With the filter, you can define what kinds of events to see on a calendar. Filters are organized by type (appointment, phone call, visit, and so on.) or by status (open, in process, complete, overdue, and so on).

> **→ Tip**
>
> By default in tablet, the event list is hidden and collapsed in a side menu. One can access the event list by clicking the hamburger menu on the top left of the worklist.

Hierarchical Table View:

The hierarchical table view is similar to the table view but allows for better grouping of related items and categories. A hierarchical table view is available under Territories. Each line in the table represents an object. If the item is collapsed, the arrow in the object points to the right, and its content isn't visible. Clicking the arrow expands the content and clicking the item opens the object.

Row and Lead Selection

You see two different behaviors depending on how you make your selection in the table. There's row selection that is indicated by light blue background color of entire row and lead selection that is indicated when the check box is selected.

When you click anywhere in white space except for checkbox, it triggers the row selection and lead selection. Only one row is selected at a time. If you click again anywhere else, the row and lead selection changes to the row in the selected area. For example, if you have machine learning pane or if master detail configured on the list, you see respective frames getting refreshed with the selection. You always have only one lead selected object.

When you select the checkbox, you explicitly enter the lead selection mode. For example, if you have machine learning pane or if master detail configured on the list, you see respective frames getting refreshed with the selection. In explicit lead selection mode, any further clicks in the white space of other row or on check box leads to additional lead selection, as multiple check boxes get selected. In multiple selections, the machine learning pane and master detail pane aren't refreshed without an explicit action to refresh them. For machine learning pane, the explicit action to refresh is done by clicking the bulb icon under the *Action* column.

Donut Charts in Datasets

Donut chart provides a simple, at a glance presentation of information. With availability of donut charts, you can quickly filter the list based on the predefined criteria. You can create donut charts using predefined dataset columns in Fiori client. In the donut chart, you can see up to eight categories including *Others*. The first seven segments are values for the data and the eighth segment contains the combined remaining values.

> **! Restriction**
>
> Donut chart doesn't give an accurate value if the eighth segment exceeds more than 493 unique segments.

When a segment value is selected, the corresponding segment is highlighted in the donut chart. Donut chart color combination has been modified to clearly distinguish the segments. Each segment of the donut chart is in different color for visual clarity.

> **i Note**
>
> Donut Charts are shown using Belize Theme colors in Blue Crystal theme.

In the donut chart, you can also see the standard and additional (KUT-key user tools) fields defined by the administrator. The administrator can define additional fields under adaptation mode . As a prerequisite, your administrator must go to *Start Adaptation* under the user menu and select the checkbox *Show in Donut Charts* for the standard and administrator-defined fields. When finished, end adaptation to see the added fields in the donut chart.

> **! Restriction**
>
> You can't plot the donut chart for the fields that are removed from the list.

Enable Editing Directly in the Worklist View

In many objects, you can edit information directly in the worklist view, without navigating to the detail view.

Directly editing in the worklist view reduces the number of clicks, and the time it takes to navigate to object detail view to make an edit.

The administrator can enable editing in worklist by going to the user profile menu under ▶ *Settings* ❯ *Company Settings* ❯ ◀, by turning on the toggle button for the company setting *Enable Editing in Dataset*.

Inline Edit in Datasets (Desktop Only)

You can now edit information directly within specific cells of the dataset without having to navigate to the object detail view.

With inline editing, you can change information directly in specific cells, by hovering and selecting any editable element in the table. You can edit an item directly on the same page, without navigating to another view. Inline edit functionality brings significant improvement in the user experience by removing multiple clicks and time taken earlier to open object detail view for quick changes.

The administrator can enable the feature from the user profile menu under ▶ *Settings* ❯ *Company Settings* ◀, by turning on the toggle button for two company settings *Enable Editing in Dataset* and *Enable Inline Editing in Browser*. When both settings are switched on, only then you can do inline edit in data set. With the company setting *Enable Editing in Dataset*, only the global editing is enabled.

Mass Edit on Datasets (Desktop Only)

In many datasets, you can edit information for multiple selected row columns simultaneously in one selection. To do a mass edit, switch to the edit mode for the dataset. You see an empty row at the top of the table. The empty row is the mass edit row. When you select two or more rows, then the empty row at the top of the table

becomes active. And, only at that time, cells that are enabled for mass edits are active. Select or enter a value you want to change for the specific column of the selected rows. Then, select *Save* to save your changes.

Mass edit functionality brings significant improvement in the user experience by removing multiple clicks and time taken earlier to open object detail view for quick changes.

> → Remember
>
> Not all cells are enabled for mass edit.

As a prerequisite, your administrator must go to *Company Settings* and toggle on the button *Enable Editing in Dataset*.

> ! Restriction
>
> If value help column is active and if one of the values can't be changed or are different, then mass edit can't be performed. In this case, that column in the empty row at the top, is grayed out. Currently, this behavior is a limitation.

2.6.2 Manage List in Object Detail View

Learn all the different operations and actions you can do with a list in detail view to access information quickly and easily.

- You can easily create a new related item by choosing the create (+) button at the bottom left of the object list.
- You can edit the list in detail view. In the edit mode, you can edit the title, secondary title, and attribute values. The layout and the width are maintained, but the height may expand to allow space for you to type and change information.

> → Remember
>
> - On desktop and tablet devices, the edit mode launches on top of each individual object.
> - On smartphones, the edit mode launches a full-screen, full-width window.

- When enabled, multiselection checkbox is available as a column and always visible. For multi select lists, checkboxes are always shown. For single select lists no checkboxes are shown. With this setting, you save an additional click to enable the multi selection checkboxes and the toggle action icon isn't available.
- Resizing columns can be performed by dragging the separator line between the two columns in the column header.
- Clicking on the column header on each column opens the column header menu and is used to sort or filter a particular column. This menu contains the following actions:
  - Sort Ascending
  - Sort Descending
  - You have free text filter to do column search for multiple words. You can search list columns for multiple words at once. To do a multiple word search, separate each search word by a semicolon without any space. The search is an exact search when multiple search words are entered. However, if an asterisk (*) is used, it becomes a pattern based search. For example, if you click the column header 'name', and enter search words 'Joe*; Stin, it brings up all the records of names that begin with Joe and record that contains Stin. When a single search word is entered, the search is a pattern-based search.

Copy and Paste from Excel to List in Fiori client

There's a paste icon in the table that pastes large amount of copied data (Excel or data separated by semicolon) into the table.

> **i Note**
>
> - Only supported in table view.
> - Don't use values containing semicolon, as semicolon is used as a field separator. Using semicolon values cause errors.
> - Supported in all tablets and browsers.

For mass copy paste, do the following steps:

1. Copy the data (Excel or data separated by semicolon) you want to paste into the table.

   > **⚠ Caution**
   >
   > - A column can have multiple fields. If the table is empty, the number of actual fields in a column can be checked by adding a new entry.
   > - When pasting the records leave the checkbox field empty, if you want the checkbox unselected.
   > - Any random value added in the checkbox field shows the checkbox selected. To show the checkbox selected correctly, add true or X as the field value.

2. Click the paste icon, an input field shows up. Do CTRL+ V or right-click to paste the external data. In all tablets, do a long press and paste.
3. 3. When the data is pasted, the new rows are added to the table. If there are errors, a message is displayed showing the number of errors in the data. Fields with errors are also highlighted in red.

   > **i Note**
   >
   > When you paste the data in the input field, the table switches to edit mode

4. Correct all the errors by seeing the details and then save the pasted data.

Recommendations:

- You must always enter the object ID in the value selection fields.
- One column can have multiple fields. You enter the values for each field in the column, irrespective of the type of column.
- Make sure that the read only (noneditable) fields are empty. Don't enter incorrect values for these fields as it can't be corrected from the user interface.
- For checkbox, use True, False, X or an empty string. Here empty string and false can be used for unchecking checkboxes. All other values show the checkbox selected.
- For quantity and amount fields, if you enter any special character, it gets defaulted to 1 or as configured.

Limitations:

- The copy paste feature isn't supported in Windows 8.1 app.
- Dropdowns based on context and list ID-based codelist aren't supported.
- You can't navigate to different pages based on the error message. You must manually navigate to the right page to identify the row that has the error.
- The order of records added is based on the sort order defined on the list.

- It isn't possible to only revert the new rows created using the mass copy paste feature. When you select the button,*Cancel* you lose all the changes made on the object.

Search and Add or Edit for Lists

You can quickly add or edit list items without having to search in the list. Adding new line items or finding and editing existing line items in a list is available in the search box, where enabled.

You can search for items in the search box on the list toolbar.

- Add scenario: If the item doesn't exist in the list, then it gets added to the top of the list.
- Edit scenario: If the item exists in the list, then the corresponding row is highlighted and ready for editing.

Enable Inline Editing in Object Detail View (Desktop Only)

Inline editing is available for certain fields in object detail view (desktop only).

> → Tip
>
> When multiple fields have to be edited, it's recommended to use global edit.

With inline editing, you can quickly edit a field without going into the global edit mode. In inline edit mode, when you hover over a field, you see the related icon to edit the field. For example, let's say you want to edit the phone number in inline edit mode. When you hover over the phone number field, you see the pencil icon. Click the pencil icon to change the phone number. After you have made the edit, *Save* and *Cancel* action are available. You can either save or cancel your changes.

The administrator can enable the feature from the user profile menu under ⫸ *Settings* ❯ *Company Settings* ❯, by turning on the toggle button for the company setting *Enable Inline Editing in Browser*.

> → Remember
>
> The company setting will be retired with May 2020 release and inline editing will be available as a default.

> ! Restriction
>
> - The feature is available only on browsers (desktop/laptop).

2.7 Flags, Tags, and Favorites

Learn to work with flags and favorites and use them to keep important items handy.

Flags, tags, and favorites!
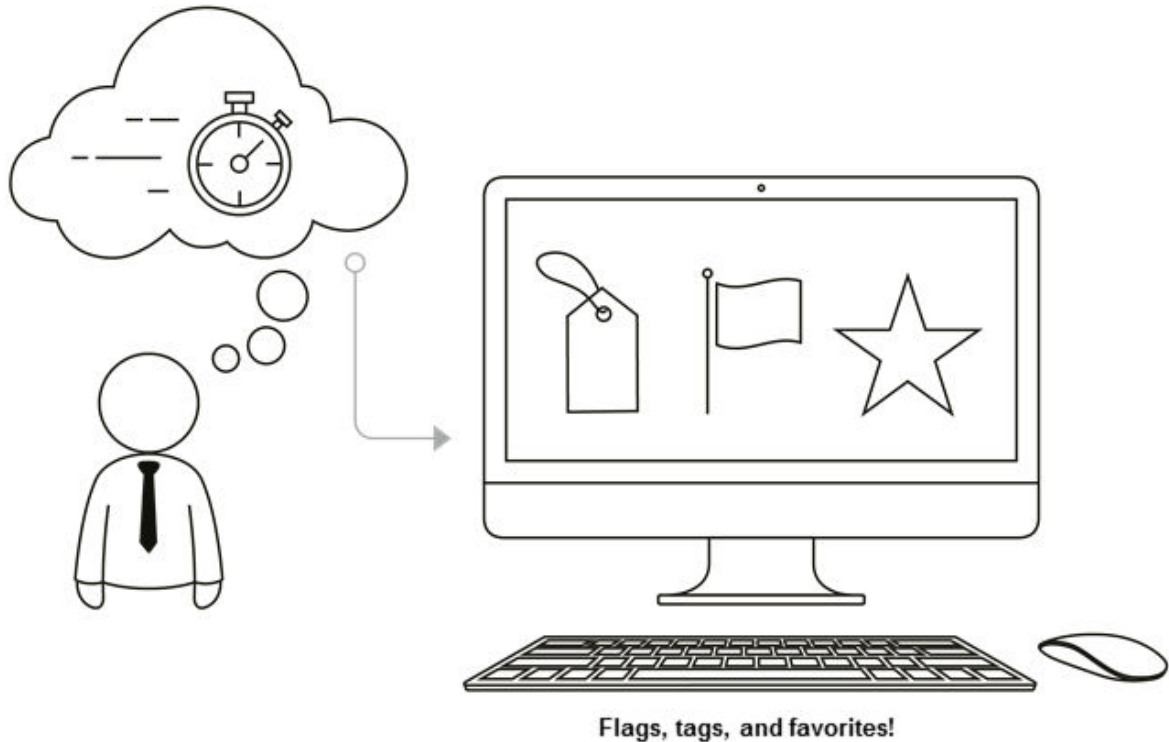
In SAP Cloud for Customer, you can mark the items for quick access. This marking is useful for items that you access repeatedly, or maybe for reminding yourself to update an item in the near future.

It is just like at home where you may have a favorite coffee mug handy on the shelf for easy access or a purchased item in the front of the closet that needs to be returned. Similarly, in business, you can add items such as accounts, activities, or contacts for quick access. You can find the flag, favorites, and tags under the navigation tab, on the bottom left of the screen.

You can mark items as **Flags** or **Favorites** for quick access and keep them until you don't need them.

Favorites are used to mark items that you frequently use and want to keep handy. Flags are used to mark items that you want to follow up on.

> ℹ **Note**
>
> In SAP Fiori client user-interface, the Flags and Favorites are available under the productivity icon in the shell bar.

Work With Flags and Favorites [page 48]
> You can flag objects for follow-up, or mark frequently used objects as Favorites.

Tags are unique identifiers that can be associated with to your items to search, sort, categorize, filter, and segment in an efficient way.

2.7.1 Work With Flags and Favorites

You can flag objects for follow-up, or mark frequently used objects as Favorites.

When an object is flagged or marked as a favorite, the corresponding object marker appears next to it:

- A small flag indicates that the object is flagged.
- A small star indicates that the object is marked as a favorite.

You use the flag option when you flag objects for later reference and follow-up. You use the favorite option when you mark frequently used objects.

VIDEO: Using the Shelf, Flags, and Favorites

Find out about the shelf, how flags and favorites are connected to it, and how to use it to keep important items at your fingertips.

2.7.1.1 Add Flag or Favorite

Learn how to flag or mark as favorite an item you frequently use.

Context

Do the following steps:

Procedure

1. Open the item that you want to flag or make as a favorite.
2. Set the flag or favorite icon indicator for the item on the top right-hand corner.

   To access the items you flagged or marked as a favorite, click Flag or Favorite icon at the left bottom of the screen for quick access.

2.7.1.2 Open Items from Flag or Favorite

Learn how you can quickly open items marked as flag or favorite.

Context

Do the following steps:

Procedure

1. To see the list of all items under it, select the flag/favorite icon at the bottom left of the screen.
2. To open an item from either the flag/favorite, select the name of that item, which appears as a link.

2.7.1.3 Remove Items from Flag or Favorites

Items remain under flag and favorites until you remove them.

Context

To do so, you have the following options:

1. Remove the flag and favorite indicators from the item.
2. Remove the item from the flag and favorites list directly. Do the following steps:

Procedure

1. Select the pencil icon in the flags or favorites list. Select the remove (x) icon that appears to the right of your item.
2. Click *Save* to keep the changes. The item disappears from the flag and favorites list, and the flag and favorite indicators are removed from the item.

2.7.2 Work With Tags

Tags are unique identifiers that can be associated with to your items to search, sort, categorize, filter, and segment in an efficient way.

It's similar to adding keywords or any additional information to any item in the solution. For example, if there are a few opportunities in your account that requires high priority. You can tag those opportunities as important, so that you can easily filter them from the other opportunities in your account.

2.7.2.1   Add Tag

Learn how to add a tag and find your items quickly in the solution.

Context

Do the following steps:

Procedure

1. Open the item you want to add a tag to. The tags area is located in the item header.
2. In the tags area, enter a name for your tag then choose SPACEBAR. You have the following options:
   1. ○ To enter a public tag that everyone can see, enter the tag text in the entry field.
      ○ To enter a private tag that only you can see, enter an asterisk (*) before the tag name.
        For example, at a sales conference, you talk to five potential customers who are eager to buy your product. You want to follow up on the leads yourself, so you use a private tag, *hot_leads. You can find them easily in the system and call them next week.

      > i Note
      >
      > ○ Tags cannot contain spaces.
      > ○ Tags are not case-sensitive and always appear as lowercase. For example, the system regards the following tags as the same tag, which appears in the system as "hartford": Hartford, HARTford, or hartford.

3. As you type your tag, the system runs an automatic search, comparing your entry to existing tags. You can accept a suggested tag from the automatic search results. When you accept a suggested tag, the system creates a copy of that tag for you. You can edit, remove, or delete any tag that you assign to an item without affecting this tag in the rest of the system.
4. For additional tag, select the tag icon in the item header and add your tag to the list.
5. Your entry is saved and reflected as an addition in the tag number display.

2.7.2.2 Remove Tag

Learn how you can easily remove tags from items you do not use any more.

Procedure

1. Open the item that contains the tag that you want to remove.
2. In the item header under tags, all the tags for this item appear.
3. Delete the existing tag. Or, select the pencil icon that appears when you hover in the Tags area. A Remove (x) icon appears to the right of your tag. Select it to remove the tag from the item. The tag is removed from this item only. All other items assigned to this tag keep their assignments and the tag displays in the solution as one of your tags.

2.7.2.3 Rename Tag

Learn how to rename and change a tagged item.

Context

Do the following steps:

Procedure

1. Open the item that contains the tag that you want to change. In the item header, under the tags icon, all of the tags for this item appear.
2. Delete the existing tag and replace it with the new tag. Or, select the pencil icon under tags, on the bottom left area of the screen. Select the tag you want to rename and type a new name.

2.7.2.4 Display Items Assigned to Tag

Learn how to see the different tags assigned to items in the solution.

Context

Do the following steps:

Procedure

1. Open the tag icon on the left bottom of the screen.
2. Search or filter the list.

   To search the list, enter a search term in the search field at the top of the pane. When you click the result of the search, it lists the corresponding items. To filter the list, you can use the following predefined filters:
   - **Recent Tags**: This filter shows the 50 most recently used tags from the last 30 days. This list is sorted chronologically so that the tags that were used most recently appear at the top of the list.
   - **My Private Tags**: This filter shows your most frequently used private tags.
   - **My Public Tags**: This filter shows the most frequently used public tags.
   - **Popular** : This filter shows a ranked list of the most popular tags, including both your private tags and all public tags.
     A tag can be used multiple times. The more frequently a tag is used, the higher it is on the list.
3. Select a tag from the list. The system searches for items assigned to that tag and displays them as search results. You can also run this same search using shortcuts in the global search.

2.8 Feed

Learn about using the feed that allows you to quickly communicate and collaborate with your network.
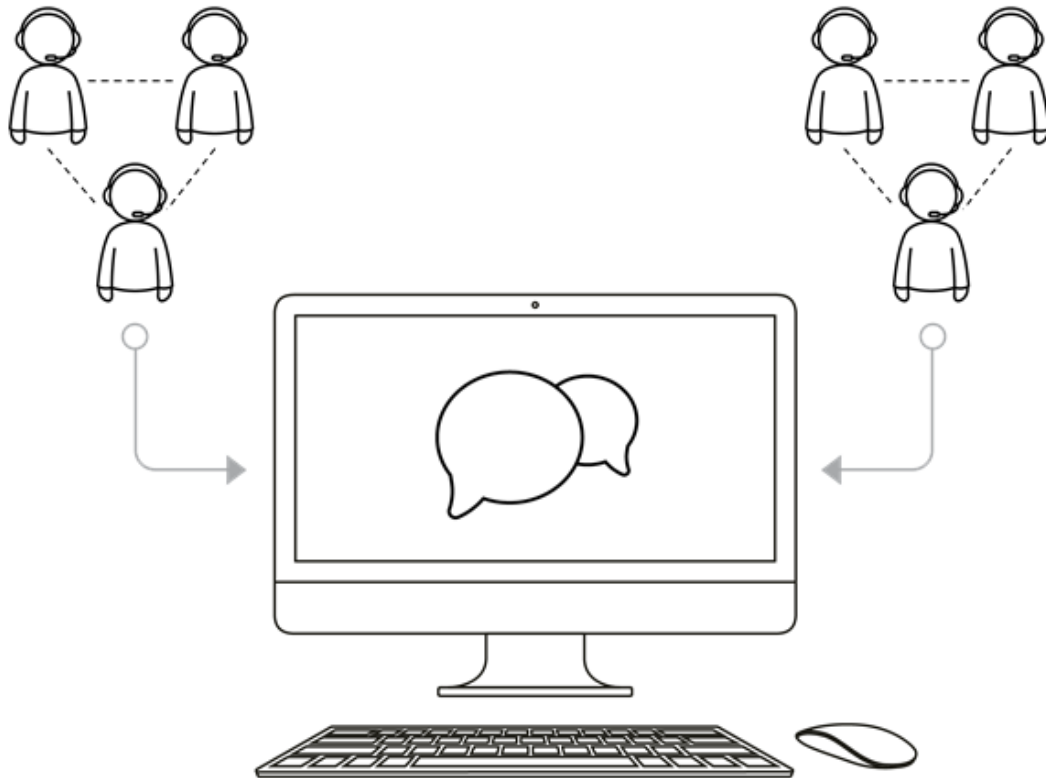
Feed is where you post updates to your network and receive updates from your feed sources — the information and people you require to complete your work. In the feed, you can post feed updates (using shorthand), comment on feed updates, and delete feed updates. You can also manage your feed sources and feed settings. As with other items in the solution, you can also search feed updates, use filters to view only certain types of updates, flag or tag feed updates, or add them to your Favorites.

For more information about integrating SAP Cloud for Customer with SAP Jam Feeds, see the **Related Links** section.

VIDEO: Using Feed

Find out where feed updates come from, how to post and comment on feed updates, and where to find private updates.

Learn how to use and manage feed to collaborate with team members and speed up the decision process.

Feed FAQ [page 58]
This section answers commonly asked questions about Feed.

Related Information

Prepackaged Integration with SAP Jam

2.8.1 Work With Feed

Learn how to use and manage feed to collaborate with team members and speed up the decision process.

Additionally, get updates on the important items that you follow such as who updated an item, what changes were made to an item, and so on.

With Feeds you can:

- Post messages and share it with all the users in your organization.
- Mention someone or add a tag in your status messages.
- Send private messages to your colleagues.
- Comment on status messages and reply to private messages.
- Follow automatically by creating auto-follow rules.
- Attach an image or document to messages.
- Receive notification for mentions and changes you made and those that you follow.

2.8.1.1 Post Feed Updates

Learn about the basics of posting feed updates so you can stay connected with your network.

To post a feed update, enter a text of up to 500 characters in length, then choose **Submit**. Once you post an update, it appears in your feed. If other employees are following either you or the item you updated, then your update also appears in their feed. Employees you mention in your update (with the shorthand @) also automatically see the update in their feed, even if they are not following you or — when you mention them while posting an update from an item — the associated item.

2.8.1.2 Use Shorthand in Feed Updates

Learn about using shorthand in feed updates.

Within feed updates, you can use shorthand to tag items or mention people, or send private updates, as described below.

Shorthand	Description
@	To mark an item or mention a person in your update, enter an at sign (@) and then choose the item *Type* and the person's *Name* you want to mention. For example, enter *@AccountABC* to mention the account named *AccountABC*, or enter *@Frank Friedman* to mention a customer named Frank Friedman.
	Items that you mention in an update appear in the feed as links that can be opened for viewing or editing. Employees who receive your update can only open tagged items that they are already following.
*	To send a private update to an employee, enter an asterisk (*) plus the employee name, followed by the private update. For example, to send the private update "Good work!" to the employee Maria Smith, enter **Maria Smith Good work!*, then choose *Post*.
#	To tag a feed, enter the # sign and enter the tag name, followed by the update. If the tag name matches an already existing tag, it can be added automatically.
	You can add additional tags to this feed update using the tag icon, in the future.
	i Note Tags are public (once created, can be used by anyone) or private. They help you categorize and search on items.

After you enter shorthand and two characters of the item or person — for example, @Ac, @Fr or *Ma— an automatic search is performed, comparing your entry with existing items or people, and allowing you to select the correct one.

> i Note
>
> If a business document has a single-digit number, enter an asterisk after the number, for example 5*.

2.8.1.3 Comment on Feed Updates

Learn about adding comments in your feed updates.

To comment on a feed update, choose **Reply** within the update. Enter your comment and submit. Within the comment of a feed update, you can also use the shorthand @ to tag items or mention people. If you tag an item in the comment, then your comment also appears in the feed of that item.

> **i Note**
>
> You cannot use the shorthand * to send private comments to other employees.

2.8.1.4 Delete Feed Updates

Learn how to delete feed updates.

To delete a feed update, choose **Delete** within the update line. The update and its comments are removed from your feed. If you delete one of your own feed updates, then the update and its comments are removed from your feed and from the feed of your followers.

> **i Note**
>
> You can delete only feeds created by you. Feeds created by other users can't be deleted.

2.8.1.5 Manage Feed Settings

Learn how to manage your feed settings for optimal efficiency.

To manage your feed settings, choose *Feed Settings*, where you can determine the following:

- Feeds Followed: Automatically receive system feeds of the users you are following.
- Follow Requests: This is only applicable for accounts and employees.
  - If this option is not checked, whenever you want to follow an account or employee, the respective account owner or employee gets a notification. Once the follow request is approved, you start following the account or employee.
  - If the option is checked, you can follow the account or employee automatically. No approval is required.
- E-Mail Digests: To receive periodic summaries of all feed updates via e-mail, choose **Send digests of all my feeds**. You can set the frequency of feed e-mails that you want to receive to - Immediately, daily or weekly.

  > **→ Remember**
  >
  > When the frequency is set to immediately, you get an e-mail for each update. By selecting this option, you have to select the events in Feed Sources for which the e-mail has to be sent.

- The date by which feed updates are sorted - Feed updates are sorted, by default, according to the date they were last commented. If you prefer that feed updates be sorted according to the date they were created, then select **According to creation date**.
  On this screen, you can also define default event types for the items that trigger feed updates.

VIDEO: Changing Your Feed Settings

Find out how to adjust which updates you receive from the source you're following and how to automatically flag and tag incoming updates.

2.8.1.6   Follow Feed Sources

Learn about following feed sources in the solution.

If you are authorized to receive updates from an item that you have chosen to follow, then updates about that item automatically begin to appear in your feed. If you are not authorized, then a follow request is sent to the person responsible for approval. If you stop following an item or person, then the source is removed from your feed, and updates for that item or person no longer appear there.

2.8.1.7   Manage Feed Sources

Learn about managing feed sources to increase productivity.

To manage your feed sources, choose *Feed Sources*. Here you can see a list of the sources that you're currently following. For each source that you follow, you can specify the source events that will trigger an update. To do so, select a source from the list, then choose the edit icon. A new window *Manage Source Events* opens up. Select the source events for which you want to receive updates and save your entries.

Under feed sources, we have the following queries:

- **Sources I follow automatically**: There's no list maintained as every object in the solution decides this. For example, opportunity object may decide that when opportunity is created, owner of that opportunity should automatically follow it and get all updates. Generally, opportunity, lead, sales order, sales quote work this way.
- **People**: All the employees who are following.
- **Pending Sources**: Employee and account object have special provision where if someone wants to follow them, an approval request goes to employee/account owner and once approved, then only the follow process starts. So, requests that aren't yet approved are shown over here. We have an option in feed settings to invoke such approval process, if that setting isn't active, then follow happens automatically without any approval process.
- **All other sources**: Everything else that doesn't fall under sources I follow automatically, people and pending sources, is part of this option (manual follow is major contributing agent in this case).

All feed sources have an additional option that can be invoked using the pencil icon and opens *Manage Events*. Under manage events, you can set things (generally email digest for immediate updates) at more fine granular level.

2.8.1.8   Manage Feed Duration Settings

Learn about setting the time period to display feed on UI and the time period to retain feed data in the system.

As an administrator, navigate to ▌ *Administrator* ❯ *Common Tasks* ❯ *Feed Duration Settings* ▌ to set the feed durations. From the *Feed Display Duration* dropdown list, you can select the time period to display feed on UI.

From the *Feed Delete Duration* dropdown list, you can select the time period to retain feed data in the system. Any feed older than the defined delete duration is deleted from the system, and the deleted data cannot be recovered.

> **i Note**
>
> - For both feed durations, the options of 30 days, 60 days, 90 days, 180 days, and 365 days are available, and the default value is 365 days. All the feeds older than 365 days are automatically deleted from the system during upgrade, and the deleted feeds cannot be recovered.
> - Feed display duration cannot be longer than feed delete duration.

2.8.2 Feed FAQ

This section answers commonly asked questions about Feed.

2.8.2.1 Why are the native feeds missing after integrating the system with SAP JAM?

You can either have the JAM or native feeds in the system.

Both feed types are not supported simultaneously in the system. This is the expected system behavior. So, when you integrate SAP cloud for Customer with JAM, you can only see the JAM feeds.

2.8.2.2 Why is there no link to a related object in feed notification?

The standard behavior is that when you open the details of a received notification, there is no link for the related object.

If you leave a comment under a system-generated feed, then there is no link in the feed notification details for the notification receiver. However, you can manually add an object link in the feed comment using, for example @ABC (ABC represents the object ID or name).

> **→ Remember**
>
> If you leave a comment under a feed created by a person, then is a related object link in the feed notification details for the notification receiver.

2.8.2.3 Why don't I receive feed notification for a followed business object that I changed?

It could be because you didn't select the related Event of the business object you followed in the feed settings. Under feed settings, select the business object you followed, and then select related option **Address Change**.

Or, you have deactivated the system feed generation for your cloud solution in Business Configuration. To activate the system feed, please ask your administrator to reset the following scoping question:

1. Go to ▌ *Business Configuration work center* ❯ *Implementation Projects* ❯ *Edit Project Scope* ❯.
2. Go to *Questions* tab.
3. Go to *Communication and Information Exchange*.
4. Select ▌ *People Collaboration, Intranet and External Services* ❯ *Communities, Document Management and External Services* ❯.
5. Uncheck the question *Do you want to deactivate system feed generation for your cloud solution?*

2.8.2.4 Even though I successfully deleted a contact, some related data can still be seen in the respective feed entries. Why?

According to GDPR (General Data Protection Regulation), deletion of data is not technically feasible. However, the administrator can set the soft deletion and hard deletion of feeds under *Common Tasks* in the Administrator work center.

2.8.2.5 Why a feed comment referencing a document in a feed post, is not displayed in the document feed tab?

If a document is referenced in a feed update and not a comment, only then the post is displayed in the document Feed tab.

2.9 Search

Learn about the various search functions in the solution.
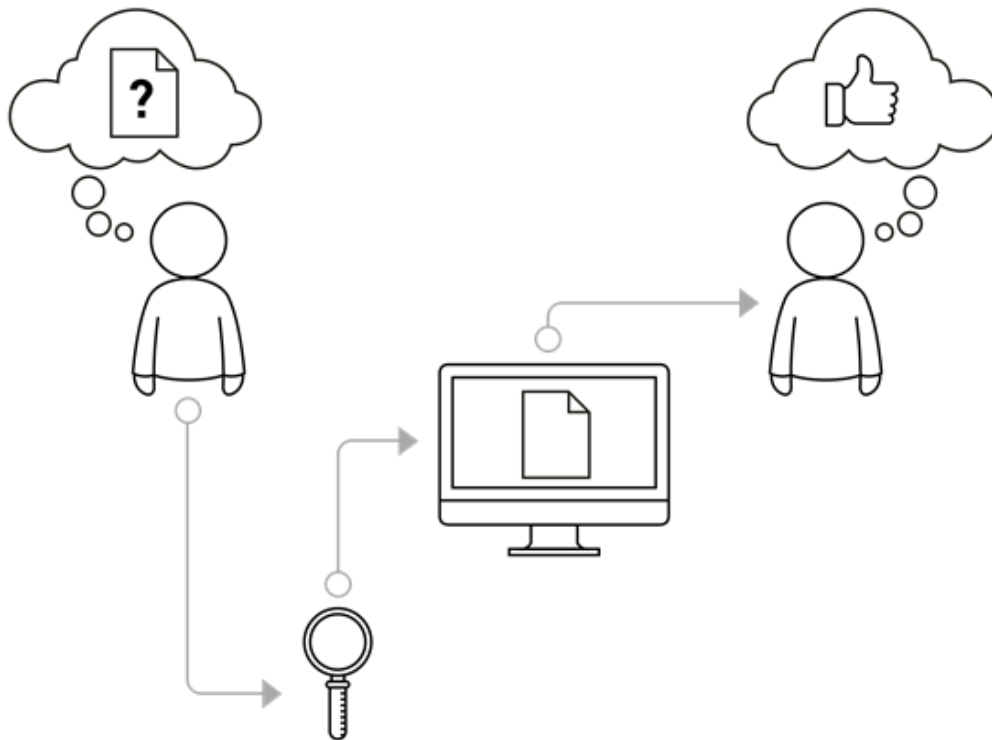
When you search for business objects in SAP Cloud for Customer, such as accounts, products, activities, or sales orders, there are multiple methods of finding exactly what you are looking for.

When you tend to search for the same items repeatedly, mark the item as a flag or favorite or add a tag to it and save valuable time.

You can sort on the column in ascending or descending order or use the filter to search the column for multiple words.

You can search list columns for multiple words at once. To do a multiple word search, separate each search word by a semi colon without any space. The search is an exact search when multiple search words are entered. However, if an asterisk (*) is used, it becomes a pattern based search. For example, if you click the column header 'Name', and enter search words 'Joe*; Stin, it brings up all the records of names that begin with Joe and record that contains Stin. When a single search word is entered, the search is a pattern based search.

Whether your search is simple or complex, the SAP solution search allows you to work quickly and efficiently by using one of the following search types:

- Simple
- Enterprise

- Advanced

2.9.1 Basic Search

Learn about performing a basic work center view search in the solution.

In addition to the system-wide enterprise search, you can search from within the work center views assigned to your business role. This is ideal since you probably know what you have created and can really hone in on the business object you are searching for.

Let's say you are searching for a phone call in the Activities work center. You navigate to the Phone calls work center view and from there, you can select an item from the **Phone calls** list. The system locates categorized items matching your search criteria belonging to the **Phone calls** list.

Another example is to navigate to a work center view end simply enter a keyword in search field. Any items matching your criteria in that work center view in list view show up.

Basic search shows your recent searches and your recently opened items. You can quickly see your recent searches and recently opened items without having to search for them again.

> i Note
>
> The search suggestions are available only on the device where the searches are done.

The basic search results can be displayed in the **List**, **Card**, **Map**, or **Calendar** view depending on the business object. There is also the possibility to filter the results and display them in a chart view.

> i Note
>
> In Fiori client, you can display the results in *Chunk View* and *Table view*.

The search term in basic search is retained even when you change the query. Therefore, you can search across different queries without typing the search term again.

With basic search, you can search against *All* query with a search term, used for some other query. When a search term is entered, the search box remains open. If the search does not find a match, you can trigger a search on *All* query, without having to change the current query. The search term is now retained even when you change the query and you can quickly find items you are looking for.

> → Remember
>
> When you create your own query via KUT and label it "All" and hide the standard SAP *All Query*, then 'search against all' functionality will not work.

2.9.2 Enterprise Search

Learn about using the enterprise search in the solution.

Context

Enterprise search allows you to search through the entire SAP solution. After selecting the search icon, you can choose to do a simple or advanced search. You can search for a term without specifying any details, search in all categories or you specify a specific category.

Procedure

1. Click the search icon in the Taskbar.
2. Narrow down your search to a specific category by selecting the category in the dropdown list. If you want to search through the entire system, select *All Categories* or if you do not select a category even then all categories are searched.
3. Enter your search terms then click Search or press Enter. Search results are presented in the Search window. You can use the asterisk (*) symbol to perform a wildcard search. For example, searching *ell* returns terms such as well and hello.
4. Click the link of the item you want to view.
   - If you are searching for items you created, select **My items**. For items created by colleagues, select **All Items**. If the search displays several business objects, you can select the appropriate category or use the enterprise search advanced functionality to refine your search.
   - Keep in mind that although an enterprise search does match your term and selected category, it does not search for every field in the system.

2.9.2.1   Configure External Search Sources

Learn how to activate or deactivate several external sources (URL mashups) that are shipped with the solution.

The enterprise search feature can be configured to include external sources. You can also add new external sources by creating a new URL mashup of the *News & Reference* category.

Activate or Deactivate Existing External Search Sources

1. Go to ▶ *Administrator* ❯ *Mashup Authoring* ❯.
2. Filter the list to show *URL Mashups*.
3. Sort the list by *Mashup Category*.
   All the external search sources are of the category, *News & Reference*.

4. To activate a source, select the table row for that mashup and click *Activate*.
   That URL mashup is now active and available for selection in the enterprise search drop down list.
5. To deactivate a source, select the table row for that mashup and click *Deactivate*.
   That URL mashup is now inactive and is not available for selection in the enterprise search drop down list.

Add a New External Search Source

1. Go to ▶ *Administrator* ❯ *Mashup Authoring* ❯.
2. Click *New*, then *URL Mashup*.
3. Complete the required entries and save your new mashup.

   ⚠ Caution

   The *Mashup Category* must be *News & Reference*.

   The *Port Binding* must be *Search Provider*.

   The *Status* must be *Active*.

   The new URL mashup is now available for selection in the enterprise search drop down list.

2.9.2.2   Add an Extension Field to the Search

Make an extension field available in the basic and advanced worklist searches. Extension fields are automatically added to the basic and advanced enterprise search depending on the extension field type and the business context. To improve the usability of the advanced enterprise search, you can add the extension field to a search category. This allows users to search for the contents of an extension field within a particular category, such as sales orders.

The following table shows which type of search can be used for each extension field type:

Search Type by Extension Field Type

Field Type	Basic Worklist Search	Advanced Worklist Search	Basic Enterprise Search	Advanced Enterprise Search
Amount	No	Yes	No	Yes
Date	No	Yes	No	Yes
Decimal Number	No	Yes	No	Yes
E-Mail Address	Yes	Yes	Yes	Yes
Indicator	No	Yes	No	Yes
List	Yes	Yes	Yes	Yes

Field Type	Basic Worklist Search	Advanced Worklist Search	Basic Enterprise Search	Advanced Enterprise Search
Text	Yes	Yes	Yes	Yes
Time	No	No	No	No
Quantity	No	Yes	No	Yes
Web Address	Yes	Yes	Yes	Yes

Prerequisites

You have created the extension field and have made it visible on the required screens.

Procedure

1. **Add an extension field to the basic and advanced enterprise search**
    1. Navigate to a screen on which the extension field is available and open the *Further Usage* screen for the extension field.
    To do this, enter adaptation mode and edit the screen. In the adaptation side panel, under *Extension Fields*, select the extension field from the list and, under *Field Properties*, click the *Further Usage* link.
    2. On the *Enterprise Search* tab, you can view all enterprise search categories to which you can add the field. This is determined by the business context in which you created the field.
    3. To add a field to an enterprise search category, select it from the list and click *Add Field*.
    The enterprise search category determines in which category users will be able to search for the contents of this field using the basic enterprise search. They can then refine their search by clicking on *Advanced* and using the extension field as a search parameter.
    4. Close the further usage screen and publish your changes.
2. **Make an extension field available in the basic worklist search**
    To enable the basic worklist search you must have completed step **1. Add an extension field to the basic and advanced enterprise search**. You then have to make the extension field visible in the worklist.
    1. Navigate to the work center view in which the worklist appears. For example, the *Sales Order* view in the *Sales Order* work center.
    2. From the *Adapt* menu, select *Enter Adaptation Mode* . In adaptation mode, select *Edit Screen* from the *Adapt* menu.
    3. In the adaptation panel under *Extension Fields*, select the section corresponding to the worklist table and select the *Visible* check box next to the extension field.
    4. Save and publish your changes.
    The extension field is added to the table as a column. Users will now be able to search for the content of the extension field using the basic worklist search.
3. **Make an extension field available in the advanced worklist search**

To enable the advanced worklist search, you must have completed step **1. Add an extension field to the basic and advanced enterprise search**. You then have to make the extension field visible on the advanced search find form.

1. In adaptation mode, navigate to the advanced search find form by clicking the *Advanced* link at the top right of the table.
2. Select a query from the *Show* dropdown list.
   Note that when you add an extension field to the advanced worklist search it will only be available for the selected query. If you want the extension field to be available for multiple queries, you must add it to each query individually.
3. From the *Adapt* menu, select *Edit Screen*.
4. In the adaptation panel under *Extension Fields*, select the section corresponding to the advanced search find form and select the *Visible* check box next to the extension field.
5. Save and publish your changes.
   The extension field is added to the selected query. Users will now be able to search the content of the extension field using the advanced worklist search and the selected query.

2.9.3 Advanced Search

Learn about using advanced search in the solution.

Context

Advanced Search is used for narrowing down the results by using multiple criteria at a time. The filter icon

( ) represents the advanced search and clicking the icon reveals all of the fields that can be used to narrow down search results. The filter attributes change depending on the type of object or work center you are reviewing.

Restore and *Go* are used to reset and apply the filters respectively. All the filtered results are seen in the table.

The other actions available are to save and organize the filtered queries so that you can use it again later. Click *Save Query* to save a filtered query. You are prompted to create a name for this query. Once it is saved, it appears in the object dropdown. You apply the same filters by finding the same query in the dropdown.

You can add or remove search parameters in an existing query and save it as a new personal query. We have the 'save query as' functionality in Fiori client. In Fiori client, an existing saved query can be saved with a different name with the button *Save Query As*.

Save Query As feature allows you to create a new personal query from an existing query without having to redefine parameters again.

You can also manage all the saved search queries by clicking *Organize Queries*. Clicking *Organize Queries* opens a pop-up where you can organize and remove the saved queries. The removed queries are also removed from object dropdown option.

> **→ Remember**
>
> If a query is set as the default query, you cannot select the *Remove* checkbox. To delete this query, you first select some other query as default query from the list. Then, mark the *Remove* checkbox for the query to be removed.

Advanced search option is available to search within the results of a simple enterprise search or search on specific fields names.

Procedure

1. Click *Advanced Search* icon.
2. Narrow down your search to a specific category by selecting the category in the dropdown list. If you want to search through the entire system, select *All Categories*.
3. To narrow your search results, enter more values in the input fields. The table shows how each field affects your search:

Field Name*	Search Effect
Changed On: ... To:	Displays items edited between the specified dates.
Owner:	Displays items that belong to the specified owner.
ID:	Displays items with the specified ID, for example, Product ID or employee ID.
Description:	Displays items that match the specified item description.

* - These fields exist when you chose *All Categories*. However, the fields vary when different categories are chosen.

4. To initiate the search, click *Search*. The solution returns a list of items based on your search criteria.
5. Click *Reset* to clear your search criteria.

   - To apply a filter, choose the filter icon ( ).
   - To load more items, scroll to the bottom of the list, and then choose *more*.
   - To view complete item details, tap the item in the list.

Next Steps

The way you search in the solution is unique depending on your needs and so is the way items are displayed.

When viewing objects, you notice the **worklists**, which are tables that contain documents and tasks. The worklist provides a summarized view of all your data records. You can use the search and filter options to locate

the records you need, and an advanced search indicator ( ) is shown when a query with search parameters is executed. You can also perform actions such as open, edit, create, delete, or release.

Once you have searched and located the correct business object, you can quickly preview the main contents or make edits.

When you locate business objects, they are displayed as worklist in various views, and you can decide which view is best for your needs. For example, a table view is a classical list, a chunk view shows the data in four columns, and the Map View displays Google Maps® or AutoNavi Map® view for the address in the data record.

You also have image view with different image sizes for any lists, where images are configured. Image view provides information at a glance about objects where visual information is easier to consume. For example, products, people.

There are three image view sizes supported:

- Large Image view
- Medium Image view
- Small Image view

2.9.3.1 Add an Extension Field to the Search

Make an extension field available in the basic and advanced worklist searches. Extension fields are automatically added to the basic and advanced enterprise search depending on the extension field type and the business context. To improve the usability of the advanced enterprise search, you can add the extension field to a search category. This allows users to search for the contents of an extension field within a particular category, such as sales orders.

The following table shows which type of search can be used for each extension field type:

Search Type by Extension Field Type

Field Type	Basic Worklist Search	Advanced Worklist Search	Basic Enterprise Search	Advanced Enterprise Search
Amount	No	Yes	No	Yes
Date	No	Yes	No	Yes
Decimal Number	No	Yes	No	Yes
E-Mail Address	Yes	Yes	Yes	Yes
Indicator	No	Yes	No	Yes
List	Yes	Yes	Yes	Yes
Text	Yes	Yes	Yes	Yes
Time	No	No	No	No

Field Type	Basic Worklist Search	Advanced Worklist Search	Basic Enterprise Search	Advanced Enterprise Search
Quantity	No	Yes	No	Yes
Web Address	Yes	Yes	Yes	Yes

Prerequisites

You have created the extension field and have made it visible on the required screens.

Procedure

1. **Add an extension field to the basic and advanced enterprise search**
   1. Navigate to a screen on which the extension field is available and open the *Further Usage* screen for the extension field.
      To do this, enter adaptation mode and edit the screen. In the adaptation side panel, under *Extension Fields*, select the extension field from the list and, under *Field Properties*, click the *Further Usage* link.
   2. On the *Enterprise Search* tab, you can view all enterprise search categories to which you can add the field. This is determined by the business context in which you created the field.
   3. To add a field to an enterprise search category, select it from the list and click *Add Field*.
      The enterprise search category determines in which category users will be able to search for the contents of this field using the basic enterprise search. They can then refine their search by clicking on *Advanced* and using the extension field as a search parameter.
   4. Close the further usage screen and publish your changes.
2. **Make an extension field available in the basic worklist search**
   To enable the basic worklist search you must have completed step **1. Add an extension field to the basic and advanced enterprise search**. You then have to make the extension field visible in the worklist.
   1. Navigate to the work center view in which the worklist appears. For example, the *Sales Order* view in the *Sales Order* work center.
   2. From the *Adapt* menu, select *Enter Adaptation Mode* . In adaptation mode, select *Edit Screen* from the *Adapt* menu.
   3. In the adaptation panel under *Extension Fields*, select the section corresponding to the worklist table and select the *Visible* check box next to the extension field.
   4. Save and publish your changes.
      The extension field is added to the table as a column. Users will now be able to search for the content of the extension field using the basic worklist search.
3. **Make an extension field available in the advanced worklist search**
   To enable the advanced worklist search, you must have completed step **1. Add an extension field to the basic and advanced enterprise search**. You then have to make the extension field visible on the advanced search find form.
   1. In adaptation mode, navigate to the advanced search find form by clicking the *Advanced* link at the top right of the table.

2. Select a query from the *Show* dropdown list.
   Note that when you add an extension field to the advanced worklist search it will only be available for the selected query. If you want the extension field to be available for multiple queries, you must add it to each query individually.
3. From the *Adapt* menu, select *Edit Screen*.
4. In the adaptation panel under *Extension Fields*, select the section corresponding to the advanced search find form and select the *Visible* check box next to the extension field.
5. Save and publish your changes.
   The extension field is added to the selected query. Users will now be able to search the content of the extension field using the advanced worklist search and the selected query.

2.10 Notification

Notifications are a way to let you know that something new has happened so you don't miss anything that might be worth your attention.

The notification is located on the top right, next to the search icon. It displays the category of actions, the time occurred, unsubscribe from the e-mail, and more details. Clicking or tapping the icon **!**, opens a dropdown list that has the recent notifications with the object type information, actions, and option to view the entire detail about a particular notification. The dropdown displays maximum five items in the list.

Each category of notification has its own set of actions. Subscribe, Unsubscribe, Undo, Approve, Decline, Dismiss are few of the common actions. When you click, *View All* you're directed to the notification center where you can see the entire list of notifications in a separate tab.

In the notification center, you can select what kind of notification you want to see from the variant dropdown or search for a particular notification. Notification category indicates the type of object and is differentiated by the icon used in front of each notification item. You click or tap the *More* link to navigate to a particular object in a separate tab.

By enabling a company setting, you can hide the notifications and the notifications icon. As a prerequisite, your administrator must go to *Company Settings* and toggle on the button *Hide Notification*. Seeing notifications can be disruptive, and also takes space on the screen.

2.11 Map

Learn how to use the map feature based on Google maps or alternatively AutoNavi maps, that provides data with an interactive map in different objects.

Scope and Configure [page 70]
    Administrators can configure Google Maps or AutoNavi Maps for different accounts.

Work with Maps [page 71]
    Sales representatives are constantly on the go, and the ability to pull up an interactive map in your solution and find which leads, companies, and contacts are nearby is invaluable.

2.11.1 Scope and Configure

Administrators can configure Google Maps or AutoNavi Maps for different accounts.

Context

Learn how to configure the maps mashup to enable map view.

To enable map view via mashup, proceed as follows:

Procedure

1. Choose ▶ *Administrator* ❯ *Mashup Authoring* ❯ .
2. On the *Mashup Authoring* screen, select *Custom Mashups* from the dropdown menu.
3. Perform a search for the mashup ID. The mashup IDs for the available maps are as follows:
   ○ Google - `SM00078`
   ○ AutoNavi - `SM00079`: For use in the countries/regions such as China where Google Maps are not supported.
4. Select the mashup and click *Enter API Keys*. The *Enter API Keys* dialog box opens.
5. Click *Show API Key* and, in the *API Key Value* column, enter the API key that you received from the service provider.
6. Save your changes.
   ○ The use of the Google Maps Service is subject to Google Terms of Service, which are written in http://www.google.com/intl/en/policies/terms/ ↗ . If you do not accept such Terms of Service, including but not limited to all limitations and restrictions therein, you may not be able to use Google Maps Service in SAP Cloud for Customer. The use of Google Maps Service in or through SAP Cloud for Customer constitutes your acceptance of Google Terms of Service, and it can be terminated by SAP without reason at any time and SAP is not required to provide an equivalent service via another provider.
   As a prerequisite, please create a support ticket to obtain and use the SAP API key for Google Maps.
   ○ The use of AutoNavi Maps Service is subject to AutoNavi Terms of Service, which are written in http://lbs.amap.com/home/terms/ ↗ . If you do not accept such Terms of Service, including but not limited to all limitations and restrictions therein, you may not be able to use AutoNavi Maps Service in SAP Cloud for Customer. The use of AutoNavi Maps Service in or through SAP Cloud for Customer constitutes your acceptance of AutoNavi Terms of Service, and it can be terminated by SAP without reason at any time and SAP is not required to provide an equivalent service via another provider.
   As a prerequisite, please create a support ticket to obtain and use the SAP API key for AutoNavi Maps.

2.11.2 Work with Maps

Sales representatives are constantly on the go, and the ability to pull up an interactive map in your solution and find which leads, companies, and contacts are nearby is invaluable.

Selecting the Map view displays the addresses from the solution as pins on the map based on the business object you choose for the map view, and is fully navigable. The map view results are displayed with pagination.

> **i Note**
>
> In the Fiori client, you use Google maps.

The following objects are supported for map view:

- Accounts
- Visits
- Tours
- Route Planning
- Activity List
- Appointments
- Tickets
- Work Tickets
- Ticket Hierarchy
- Target Groups
- Assignments
- Installed Base
- Registered Products
- Utilities Premise (object and tab)

Activate Map

You can activate the map by selecting *Google* or *AutoNavi* in *Settings*. This setting is maintained the next time you use the map.

> **i Note**
>
> - Configure Google Maps or AutoNavi Maps before activating it. For more information on configuring map, see the **Related Links** section. If both Google Maps and AutoNavi Maps are configured, Google Maps is loaded by default. However, in the countries/regions where Google Maps isn't supported, such as China, AutoNavi Map is loaded.
> - Addresses must be maintained in Chinese or using Latitude and Longitude for pins to be displayed on AutoNavi Map.

Map Settings

You launch the map settings by selecting the map icon on the right bottom corner of the map. Here you can define the *Map Style* and enable or disable different controls on the map with *Map Buttons*.

Map Style

Map style allows you to choose a map type to display. Default view is selected and you can see the elevation of the landscape, like mountains and canyons by enabling terrain. Contour lines overlaid on the map show elevation and gray numbers show altitude. The other view is the Satellite view with aerial imagery of landscape. You can turn on the label to see the tagged areas in the aerial view.

Map Buttons

The Map contains user interface elements to allow user interaction with the map. These elements are known as controls and you can enable or disable these controls in your application. Alternatively, you can do nothing and leave it to the defaults.

See the list of controls you can use in your maps:

- **Zoom in/Out** control displays as icons (+ and -) in the top-right corner of the map and is used for changing the zoom level of the map.
- **Current location** icon displays your existing position.
- **Street View** control can be enabled for street view.
- **Search Nearby** is available when you select the *Search Nearby* button. You can cancel the search by selecting the *Nearby X* button. Search nearby captures a radius of 25 miles around your current location.
- **Search Map Area** is available when you pan or zoom the map. You can turn on the search by selecting *Search Map Area* button on the map and cancel by selecting *Map Area Search X* button. Search map area takes the visible area of the map and finds objects within the area.

> → Tip
>
> You can see the *Search Map Area* button on the map after you turn on *Search Map Area* in *Settings*.

> i Note
>
> Search nearby and search by area functionality is available in map and is supported in the following map views:
>
> - Accounts
> - Visits
> - Route Planning
> - Appointment
> - Installed Base
> - Registered Product
>
> Nearby Search and Search by Area feature is not enabled by default and requires the administrator to enable it under ▌ *Adapt* ❭ *Company Settings* ❭ *General* ❭ and select the checkbox *Enable Nearby Search and Search by Area on the Map*.

> **i Note**
>
> Maintain the latitude and longitude information for objects to see the map pins in search nearby and search by area mode. For more details on the topic, see the **Related Links** section.

Map Pins

> **i Note**
>
> Maintain the latitude and longitude information for objects. Otherwise, the map pins don't show up in the search nearby and search by area mode. For more information, see the **Related Links** section.

Map pins are shown in two different colors based on the account role. A blue color map pin represents a customer and a purple color map pin represents a prospect. With this color coding feature, you can quickly identify and distinguish between a customer and a prospect account on the account map.

> **i Note**
>
> This feature is available only on the account map view for the account roles customer and prospect. Any other roles maintained show up in the default blue pin color.

Show Region-Based Map

> **→ Remember**
>
> The display of international boundaries based on geolocation tracking is currently supported only in Google Map.

You can enable the region-based map setting to show regional international boundaries for your country/region. When you use the map feature in the app, your country/region's boundaries may not be clearly demarcated, if they are under territorial dispute. That is, when you log on from your country/region, you can view all the borders of your country/region marked with a solid black line. However, if you log on from a different country/region you will notice that the areas under territorial dispute are marked in dotted lines.

You can enable how the map shows up based on the company setting *Enable Geolocation Tracking*. When the company setting is enabled by the administrator, you see a localized version of the map as in the web. With the setting enabled, you see a pop-up from the system asking to know your current location. If you allow the system to track your location, you see a region-specific display of the map. In future, if you don't want to allow the geolocation tracking, you can block the geolocation tracking from under your browser settings. When you block the geolocation tracking, then Google map API of default country/region, United States of America is displayed.

> **→ Remember**
>
> Geolocation tracking is only used to show regional international boundaries for your country/region.

Related Information

2.12   Support and Help

Learn about creating incidents to report issues encountered in the solution.
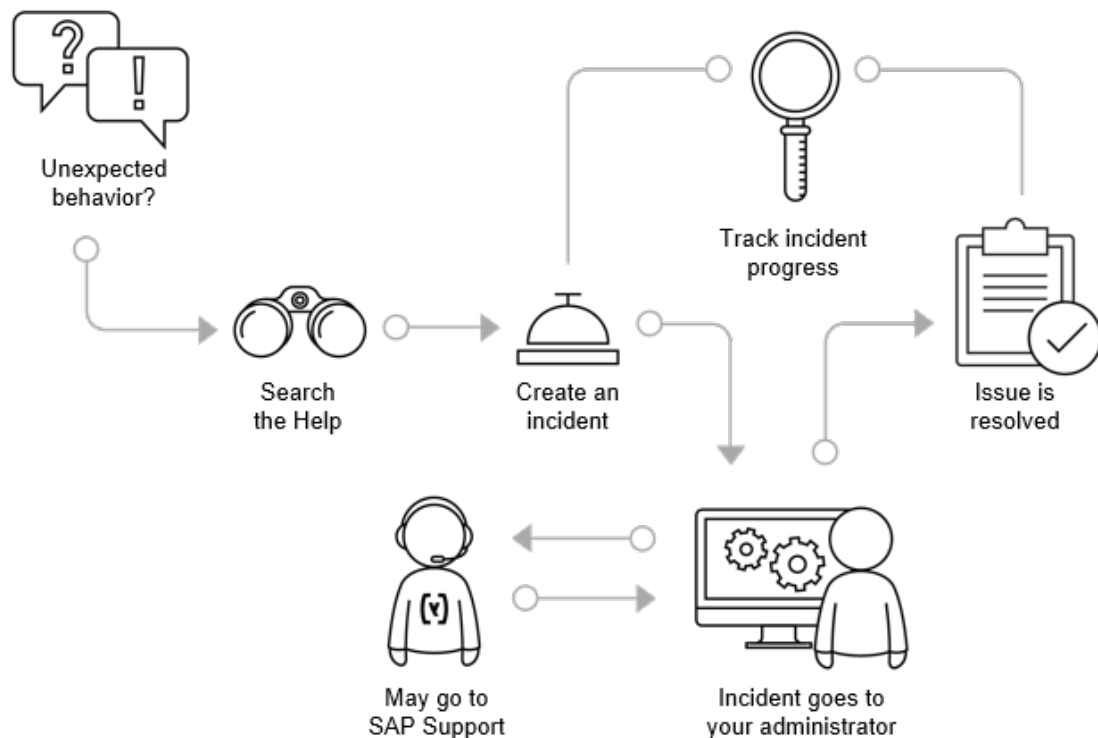
As you're working, if you encounter unexpected behavior in the solution that interrupts your work or reduces the quality of the service, you can search the *Help* under the user menu for more information or create an incident that is sent to your system administrator. *Help* launches the *Help Center*. You find company-specific help information plus links to the SAP standard documentation, channels, and community in the Help Center.

Company-specific help can be authored in Fiori client. You can define company-specific help for current screen or all screens.

Report Incident and Process Incident links are available in the Help Center. You can report incidents via the link. And, the administrator can also process incidents in Fiori client. However, Direct Forward of incidents is not available to administrators in Fiori client.

You can create an incident by going to the user menu and selecting the menu option *Report Incident*. Your administrator is the first line of support but if they can't solve the issue for you, they can send the incident to SAP for further investigation.

When creating an incident, be sure to create it from the screen where you're experiencing the issue because the system takes a screenshot and automatically attaches it to the incident. You can also add highlights or callouts on the screen to help support better understand what happened.

To help support process your incident more quickly, always include step-by-step instructions on how to re-create the behavior you're reporting.

Direct Forward button is available under incident reporting for administrators. The administrator can directly forward the incident to SAP by selecting the button. The new button reduces the number of clicks required to send the incident to SAP.

After you submit an incident, you can track it for updates via the menu option *Track my Incidents* under your user menu.

We have two real-time support features for the administrators in Fiori client- SAP Expert Chat and Schedule An Expert.

Prerequisite: One time S-User registration is required to use the real-time support features. For more information, please contact our Customer Interaction Center.

SAP Expert Chat and Schedule An Expert in the SAP Cloud for Customer app can be accessed from the User menu> *Help* > *Help Center* > *Other Helpful Links*.

> **i Note**
>
> *SAP Expert Chat* link is available in Fiori Client. Both features require S-User registration to access it and are available as a secure link via launchpad.

- **Expert Chat::**
  You can now access the launchpad SAP Expert Chat directly from your tenant. The new link opens the SAP launchpad chat tool and gives you access to additional support channels to report a new or an existing issue.
  You can chat with product support specialists as well as with our customer interaction teams for updates on existing incidents. Each chat generates an incident that you can view and edit from the SAP Support launchpad. The incident contains the chat transcript and can be used to follow up on the reported issue. However, the chat incidents aren't visible in the tenant built-in support. Find more details on the new SAP Expert Chat channel.

  > **→ Remember**
  >
  > One time S-User registration is required to access chat. For more information, please contact our Customer Interaction Center.

  .

- **Schedule An Expert::**
  With Schedule an Expert, you can book an online session and reduce the number of delayed messages and information requests that you get from support. You can speak with a support engineer and discuss the technical details of your open incident by scheduling a 30-minute Skype call. Find more details, refer to SAP Expert Chat channel. For more information, refer to the Schedule an Expert user guide user guide.

  > **→ Remember**
  >
  > One time S-User registration is required to access and use the chat. For more information, contact our Customer Interaction Center.

If you require more help than just product support, contact the consulting services📄.

An operator or administrator is responsible for managing incidents reported by users in the company and, in some cases, for those reported automatically as a result of health checks.

The administrator can maintain settings of the task types for tasks, alerts, and notifications under ▌ *Administrator* ❯ *Business Task Management* ▐.

When a new incident is reported or changes are made to an incident you are working on, you receive a task or notification.

2.12.1 Incident Management

An operator or administrator is responsible for managing incidents reported by users in the company and, in some cases, for those reported automatically as a result of health checks.

As an operator or administrator, you are responsible for managing incidents reported by users in your company and, in some cases, for those reported automatically as a result of health checks. If you are unable to solve an incident yourself, you can forward it to your provider to request assistance. Since the provider and requester cannot communicate directly with one another, you as the processor of the incident are responsible for information flow, for example, for forwarding a solution proposed by the provider to the requester of the incident.

The *Incidents* view provides all the tools you require to manage incidents.

- Incident Overview:
  An incident is a non-standard occurrence in the system that interrupts the operation of a service, or may reduce the quality of a service immediately or in the near future. An incident appears to the user as unexpected system behavior, such as:
  - An unexpected or unclear error message on the screen
  - Incorrect or missing data
  - System performance problems

  If you encounter a problem in the application, you can search existing knowledge bases for a solution. If no solution is available, you can report an incident to your key user to request help in solving the problem.
- Incident Priorities:
  When a user reports an incident, he or she must assign it a category and priority so that you as the processor can see at a glance what kind of problem has occurred and what impact it has on business productivity.
  The following priorities are available:

Business Impact for Incident Priorities

Priority	Business Impact
Very High	Critical business processes are affected and crucial tasks cannot be carried out. The incident requires immediate attention because it could result in business downtime for the organization. Security-related incidents must always be assigned this priority.

Priority	Business Impact
High	Key business processes are affected and important tasks cannot be carried out. The incident requires prompt attention because it could delay business processes.
Medium	Business processes are affected, but the incident has only a minor impact on business productivity.
Low	The issue has little or no effect on business processes.

- Incident Statuses:
  The status of an incident changes depending on the actions performed on it by the requester, you as the processor, and your provider if you forward the incident to him or her. The statuses visible to you differ slightly from those visible to the requester. The following statuses are visible to you as the processor of the incident:

Incident Status Descriptions

Status	Description
New	The incident has recently been reported and has not yet been taken over for processing.
In Process	The incident is being processed.
In Process – Provider Action	The processor has forwarded the incident to the provider, from whom action is now required.
In Process – Requester Action	Action is required on the part of the requester of the incident.
In Process – Solution Proposed	A solution has been proposed to the requester, from whom action is now required.
In Process – Reopened	The requester has rejected a proposed solution and the incident requires further action on the part of the processor.
Completed – Solution Accepted	The requester has accepted a proposed solution and the incident is resolved from his or her point of view.
Completed – Solution Rejected	The requester has rejected a proposed solution, but has canceled the incident because it is no longer valid or has been solved by other means, or the processor has completed the incident on behalf of the requester after the requester rejected the proposed solution.
Completed	The requester has canceled the incident, the processor has completed the incident on behalf of the requester, or no changes have been made to the incident for 90 days and it has been completed automatically.

Status	Description
Closed	The processor has closed the incident after the requester canceled it or after the incident was completed automatically because no changes were made to it for 90 days.
Closed – Solution Accepted	The processor has closed the incident after the requester accepted a proposed solution.

- Health Check Incidents:
  The system can report incidents as a result of health checks. Health checks are automated tests that proactively monitor the system and alert administrators or providers when a problem is detected. Most health check incidents are routed directly to the provider for processing. When a health check detects a problem that requires the attention of the administrator, the incident appears in the *Incidents* view.
- General Information on Support:
  Support is available 24 hours a day, 7 days a week for all administrators and is offered in the local language during business hours (9:00 a.m. – 5:00 p.m. local customer time). Outside of business hours, support is provided in English for *Very High* priority incidents only.

2.12.2 Scope and Configure

The administrator can maintain settings of the task types for tasks, alerts, and notifications under

▶ *Administrator* ❯ *Business Task Management* ▶.

It is possible to configure certain elements of some of the notifications in the *Business Task Management for Incident Management* business configuration activity. To find this activity, go to the activity list of your project from the *Implementation Projects* view.

If the activity is not part of your project, you must add it.

2.12.3 Tasks in Incident Processing

When a new incident is reported or changes are made to an incident you are working on, you receive a task or notification.

The different tasks in incident processing are:

2.12.3.1 Track Incidents

All incidents reported by users, and some health check incidents, are forwarded to the *Incidents* view where you can view them in detail.

You can control which incidents are displayed in the *Incidents* view by selecting one of the following values from the *Show* dropdown list:

Incident Status Descriptions

Status	Description
New Incidents	Incidents that have not yet been taken over for processing.
My Open Incidents	Open incidents for which you are specified as the processor.
Incidents Where Provider Needs More Information	Incidents that the provider has returned to the processor with a request for additional information to help resolve the issue.
Incidents with Solution Proposal from Provider	Incidents for which the provider has proposed a solution to the issue reported but that the processor has not yet proposed to the requester.
Incidents in Process	Incidents that require action on the part of the processor, that is, incidents that the processor has taken over for processing and those that have been returned to the processor by the requester.
My Team's Open Incidents	Incidents for which your team is responsible. (The team is based on your organizational assignment.)
Incidents in Process by Provider	Incidents that have been forwarded to your provider, who is currently attempting to find a solution to the issue reported.
Incidents Requiring Action by Requester	Incidents that have been returned to the requester with a proposed solution or a request for additional information.

Status	Description
Completed Incidents	Incidents that are resolved from the requester's point of view, that is, incidents that the requester has canceled because they are no longer relevant or have been solved by some other means, or for which the requester has accepted a proposed solution. Incidents that the processor has completed on behalf of the requester or that have been completed automatically because no changes were made to them for 90 days are also displayed in this list.
Closed Incidents	Incidents that are resolved from the processor's point of view, that is, incidents that the processor has closed. Once an incident has been closed, it can no longer be edited in any way.
All Incidents	All incidents, regardless of their current status.

If you select *Incidents with Solution Proposal from Provider*, you can further refine the incidents displayed by filtering the *Provider Solution* field. The following statuses are available:

Status	Description
Blank	The provider has not proposed a solution.
Proposed	The provider has proposed a solution.
Rejected	The processor has rejected the provider's solution and returned the incident to the provider for further analysis.
More Info Needed	Your provider requires more information from you (or the requester) to resolve the incident.

To view the details of an incident, click its ID.

2.12.3.2 Assign an Incident to Another User

Learn how to assign an incident to another user.

Context

If, for example, you are going on vacation and need to ensure that incidents you are currently working on or new incidents you would normally process yourself are processed by one of your colleagues, you can assign a specific processor to an incident. You can also use this option if you are unable to solve an incident you are working on and want to assign it to a colleague for further analysis.

Procedure

1. Open the incident for editing by selecting it from the list on the *Incidents* view and clicking *Edit*.
2. In the *Processor* field, enter the name of the colleague to whom you want to assign the incident.
3. In the *Processor* field, enter the name of the colleague to whom you want to assign the incident.
4. Click *Save*. The key user to whom you have assigned the incident is informed that he or she must start processing the incident.

2.12.3.3 Take Over a New Incident for Processing

Learn how an administrator takes over a new incident to process it.

Procedure

1. From the *Show* dropdown list, select *New Incidents*.
2. Select the incident you want to process, and click *Edit*.
3. From the *Action* dropdown list, select *Start Processing*.
4. Click *Save*. Your name appears in the *Processor* field and the status of the incident changes from `New` to `In Process`.

   The administrator can also take over an incident with any status for processing. If, for example, one of your colleagues is ill and you need to take on his or her tasks at short notice, you can take over an incident that your colleague has already started processing.

   From the list on the *Incidents* view, select the incident you want to process and click *Take Over*.

   Your name appears in the *Processor* field but the status of the incident does not change.

2.12.3.4 Process an Incident

The following steps are involved in processing an incident.

2.12.3.4.1 Search for a Solution

Steps to search for a solution for a new incident in the solution.

Procedure

1. Take over the incident and open it for editing. If you want to search for a solution without first taking it over for processing, for example, to scan through a list of new incidents to see which ones you can solve quickly and which ones require more effort and may need to be distributed among other administrators, click the ID of an incident to view its details and then click *Start Solution Search.* You can then search for a solution as described below.

2. Look at the incident details and determine whether you can solve the incident immediately. Especially helpful is the information on the *Screenshot* tab, which shows a screenshot of the system at the time at which the problem occurred. The requester can annotate this screenshot to further illustrate the problem and help you to understand it more quickly.

   The *Screenshot* tab is only displayed if a screenshot has been attached to the incident. A screenshot is attached automatically to each incident when it is reported unless:

   ○ The requester deselected the *Screenshot Relevant* checkbox in the *Enter Incident Information* step when reporting the incident.
   ○ The requester reported the incident from the **Add-In for Microsoft Excel**.
   ○ The system could not take a screenshot for technical reasons.

3. If you cannot solve the incident immediately, click *Solution Search* to search existing knowledge bases for a solution to the problem.

4. On the *Search* tab, in the *Find* field, enter key terms relating to the incident (for example, `sales order`). To refine your search, you can click *Advanced* and define additional search criteria such as the work center and work center view on which the problem occurred. It is possible that the system has prefilled some of the additional search criteria fields that are displayed when you click *Advanced*. To increase the number of hits your search returns, clear the values in these fields.

5. Click *Go*. The system searches the following repositories for solutions to the problem:

Repository	Description
Community Resources	Discussion forums in which users can post questions and discuss topics
Troubleshooting	A collection of common problems, along with their solutions or workarounds
Built-In Help	The documents and learning content delivered with the solution

   ○ The system displays the documents that match your key terms. The solution search is not language-specific, which means that the results list may contain documents in languages other than your application language if your key terms were found in these documents.
   ○ The display language of your Web browser determines the language in which the documents are displayed. This means that if you click a document in the results list that has an English title, but your

Web browser language is German, when you open the document it is displayed in German if the document is available in German. To change the language in which documents are displayed, change the language of your Web browser.

o To group the search results by repository type, from the *Group By* dropdown list, choose *Repository Type*.

> → Tip
>
> o If you enter keywords in a language other than English and you receive too few hits, repeat your search using English keywords to increase the chance of receiving a larger number of hits.
> o Another reason for which you may receive too few hits is that the system has prefilled some of the additional search criteria fields that are displayed when you click *Advanced*. To increase the number of hits your search returns, clear the values in these fields.

6. Click the title of the document you want to read and determine whether it solves the problem.

7. If you find a document that solves the problem, add it to the incident by selecting the *In Collection* checkbox. Documents that you attach to the incident as solution proposals are listed on the *Solution Collection* tab. If you cannot find a document that resolves the incident, forward the incident to your provider with a request for assistance as described below under **Forward an Incident to the Provider**.

2.12.3.4.2 Ask the Requester for More Information

If you have a question about the issue, you can return the incident to the requester asking for more information.

Procedure

1. Open the incident for editing.

2. From the *Action* dropdown list, select *Send to Requester*.

3. Click *Add*, then choose *Note for Requester* and enter your question in the text field. If you require a record of the exact steps the requester carried out immediately prior to the issue occurring, enter a note in the text field asking the requester to use the trace function to reproduce the issue. An explanation of this function is provided as a rollover explanation for the *Start Trace* button on the screen for editing the incident.

4. Click *Save*. The status of the incident changes to `In Process — Requester Action` and the requester is informed that action is required on his or her part.

2.12.3.4.3 Edit an Incident Without Changing Its Status

If you have already started to process an incident, you can add information to it without changing its status.

Procedure

1. Open the incident for editing.
2. Click *Add*, then choose *Note for Provider*, *Internal Comment*, or *Note for Requester* as appropriate, and enter your comment in the text field.
3. Click *Save*.
    - If you choose *Note for Provider*, the provider is informed that you have added information to the incident, and can open the incident to view the information you have added.
    - If you choose *Internal Comment*, only you can see the information you add. If you then return the incident to the requester or forward it to another key user, however, the information is also visible to this user. This option is also useful, for example, if the status of an incident is `Completed`, `Completed – Solution Accepted`, or `Completed – Solution Rejected` and you want to add a note for yourself with information that helped you to solve the incident.
    - If you choose *Note for Requester*, the requester is informed that you have added information to the incident, and can open the incident to view the information you have added.

2.12.3.4.4 Forward an Incident to the Provider

If you cannot find a solution to an issue, forward the incident to your provider to request assistance.

Context

If you forward the incident to the provider, he or she may forward it to SAP for further analysis. If SAP's root cause analysis shows that the incident results from a partner product which has been licensed, SAP may forward this incident, including all corresponding context data, to the support organization of the partner responsible.

Prerequisites: You have maintained your contact information. You must provide a telephone number and E-mail address so that the provider can contact you directly.

Procedure

1. Open the incident for editing.
2. From the *Action* dropdown list, select *Send to Provider*.

3. Check that the entry in the *Application Area* field is correct and change it if required.

4. Click *Add*, then choose *Note for Provider*.

5. In the text field, enter information about why you are sending the incident to the provider. If the incident you are forwarding has *Very High* priority, document the business impact in this field so that it is immediately apparent to the provider.

   For security reasons, **never** include your password or that of the requester anywhere in the incident.

6. Click *Save*. The status of the incident changes to `In Process — Provider Action`. Receipt of the incident by the provider is indicated in two ways:

   ○ A value is displayed in the *External Reference ID* field. This is the ID that has been assigned to the incident in the provider's system.

   ○ A `Note from Provider` is displayed on the *General* tab to the effect that the incident has arrived at the provider.

2.12.3.4.5 Send Additional Information to the Provider

If you have already forwarded an incident to your provider and want to provide him or her with additional information, perform the following steps:

Procedure

1. Open the incident for editing.

2. Click *Add*, then choose *Note for Provider*.

3. Enter the information you want to provide in the text field. If relevant, add a file or link to the incident as an attachment.

4. Click *Save*. The status of the incident does not change.

2.12.3.4.6 Reply to a Question from the Provider

If the provider has returned the incident to you with a request for more information, reply to the question by performing the following steps:

Procedure

1. Open the incident for editing.

2. From the *Action* dropdown list, select *Send to Provider*.

3. Click *Add*, then choose *Note for Provider*.

4. Enter the information you want to provide in the text field. If relevant, add a file or link to the incident as an attachment.

5. Click *Save*. The status of the incident changes to `In Process — Provider Action`.

2.12.3.4.7 Propose a Solution to the Requester

If you have found a solution to the issue, or your provider has proposed a solution, return the incident to the requester along with this solution.

Procedure

1. Open the incident for editing.
2. From the *Action* dropdown list, select *Propose Solution*.
3. Click *Add*, then choose *Note for Requester* and enter an explanation in the text field. If you have found a document that describes the solution you want to propose, add it to the incident as described above under **Search for a Solution**.
4. Click *Save*. The status of the incident changes to `In Process — Solution Proposed` and the requester is notified that action is required on his or her part.

2.12.3.4.8 Return an Incident to the Provider

If the solution proposed by your provider does not solve the problem, return the incident to him or her.

Procedure

1. Open the incident for editing.
2. From the *Action* dropdown list, select *Send to Provider*.
3. Click *Add*, then choose *Note for Provider*.
4. In the text field, enter the reason for which you are returning the incident.
5. Click *Save*. The status of the incident changes to `In Process — Provider Action`.

2.12.3.4.8.1 Use Application Sharing

The provider can initiate a secure application sharing session with you or any user in your company.

Context

To do this, the provider sends you a session request that includes the session number. When you receive a request, start the session at the appointed time by performing the following steps:

Procedure

1. Open the incident for editing.
2. Click *Start Remote Support*. A new browser session opens and the Netviewer Web page appears.
3. Select the language for your session, then click the icon under *Click to start the Netviewer one2meet participant program*.
4. Click *Run*.

   Depending on your security settings, you might have to click *Run* more than once.
5. Enter the session number that appears in the request from your provider. (You do not need a password to join the session.)
6. Click *Connect*. The Netviewer screen appears.
7. Follow the steps on the screen and agree to share the content of your screen with the provider.
8. If you want to keep a copy of the Netviewer session log file, click *Save*.

   To view the log file, you need the Netviewer NetPlayer, which you can download from the same Web page from which you started the session.

2.12.3.4.8.2 Process a Health Check Incident

When you receive a health check incident, the steps you need to follow to solve the issue are listed in the message. Health checks appear in your application language.

Context

The description appears in English by default. This ensures that the provider can understand it. You can view the information in your application language by clicking *Health Check*.

To resolve the incident, perform the following steps:

Procedure

1. Take over the incident and open it for editing.
2. Read the instructions in the health check message and perform the steps listed there.
3. If completing the steps solves the incident, from the *Action* dropdown list, select *Complete*.
4. Click *Save*. The status of the incident changes to `Completed` and you can then close it.
5. If completing the steps does not solve the incident, from the *Action* dropdown list, select *Send to Provider* to forward the incident to the provider. If you want to include additional information in the health check incident you are forwarding, you can add or update attachments or click *Add*, then choose *Note for All Parties Involved* to enter additional information in the text field.

   If you add text using this feature, everyone involved in processing the incident (the processor and provider) is able to read it.

   If necessary, you can also change the priority of the incident.
6. Click *Save*. The status of the incident changes to `In Process — Provider Action`.

2.12.3.4.9 Close an Incident

Learn how an administrator closes an incident.

Context

If the status of an incident is `Completed`, `Completed — Solution Accepted`, or `Completed — Solution Rejected`, the *Close* option becomes available to you in the *Action* dropdown list so that you can indicate that the incident is resolved from your point of view.

Procedure

1. From the *Show* dropdown list, select *Completed Incidents*.
2. Open the incident for editing.
3. From the *Action* dropdown list, select *Close*.
4. If necessary, click *Add*, then choose *Internal Comment* and enter a note in the text field.
5. Click *Save*.
   - If the status of the incident was `Completed — Solution Accepted`, it now changes to `Closed — Solution Accepted`.

○ If the status of the incident was `Completed` or `Completed — Solution Rejected`, it now changes to `Closed`.

6. The incident is now closed and can no longer be edited.

2.12.3.4.10 Escalate an Incident

Incident Escalation Management is an exceptional process for handling critical incidents that cannot be solved satisfactorily or within a reasonable period of time by the Incident Management process.

Prerequisites

You have submitted an incident with *Very High* priority and its initial response time (IRT) has been exceeded.

A *Very High* priority incident is justified in the following situations:

- You cannot access your application at all.
- The go live of your application or an upgrade of your system is endangered.
- Your core business processes are suspended and no alternative processes are available.
- Your incident requires immediate attention because the current issue leads to serious losses for your business.

To request escalation, call the emergency hotline for your country and provide the following information:

- The incident ID
- The business impact of the incident
- The name of at least one contact person and his or her telephone number and E-mail address (ensure that this person can be contacted 24 hours a day, 7 days a week)

2.12.3.4.11 Complete an Incident on Behalf of the Requester

If it is not possible for the requester to complete an incident, for example, because he or she has left the company, you as the processor must complete the incident on the requester's behalf.

Procedure

1. Open the incident for editing.
2. From the *Action* dropdown list, select *Complete*.
3. Click *Save*. The status of the incident changes to `Completed` (or `Completed — Solution Rejected` if the requester has already rejected a proposed solution) and you can then close it.

Next Steps

You can set an incident to complete quickly without opening the incident, by clicking the *Complete* button. The button is also available in the incident edit screen. However, you have to explicitly click *Save* after clicking the *Complete* button.

2.12.3.4.12 Cancel an Incident

Learn how an administrator cancels an incident.

You can only cancel an incident when the incident IDs are generated. You cannot cancel an incident if the ID of the incident is pending in ▶ *Help Center* ❯ *Track My Incidents* ◀. The *Cancel Incident* button is disabled for such incidents until the incident IDs are generated.

2.13 Side Pane

The side pane appears on the right side of the main content.

Side pane is seen in three areas on the user interface. It is available in the work center view and in the detailed view. It is also available as a global side pane in the personalization and adaptation mode or in the help center view.

- In the work center view - The pane appears at the right side of the screen. It contains key information pertaining to the selected item in the list. Currently, the side pane in the work center is used for showing machine learning content. The groups are divided sections of the side pane that hold related information together.
- In the detailed view - The pane appears on the right side of the screen. It contains key information pertaining to the item and can be accessed throughout all of the tabs. The pane is mainly for viewing and light editing. It acts as a resource for accomplishing tasks inside the detail view. The side pane is divided into sections with relevant information. These groups are configured by you.

> i Note
>
> ○ Expand or Collapse - You can click the active tab to collapse the pane. Clicking on any tabs in the collapsed mode expands the pane again, and the clicked tab is the active tab.
> ○ The system remembers last state - The last state of the pane is remembered by system for the next time you sign into your account. For example, if you collapsed the pane the last time you were logged on, then you see that the pane as collapsed when you sign into you account.

- As a global side pane in the personalization and adaptation mode or in the help center- The global side pane appears on the right side of the screen in the personalization or adaptation mode or when the help center is launched.

2.14 Personalization

Learn how to personalize the solution settings to suit your needs.
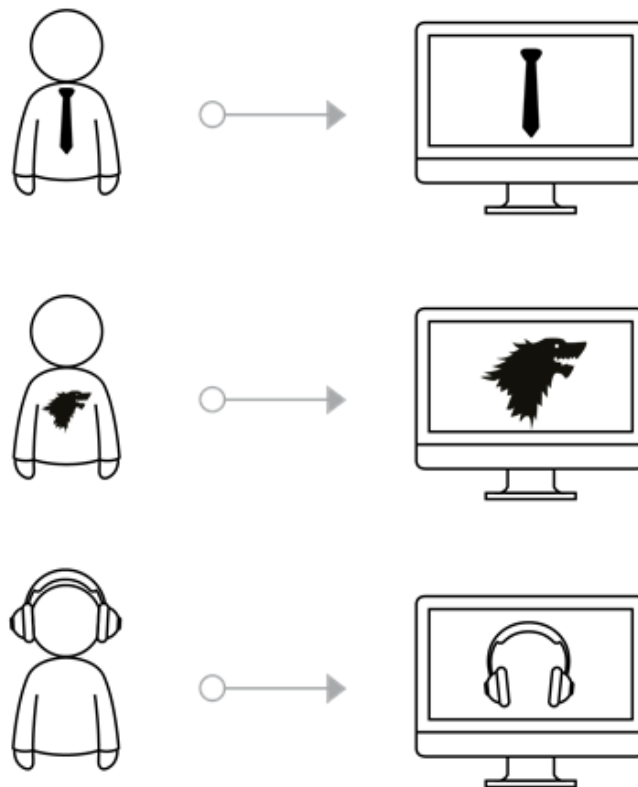
When SAP Cloud for Customer is implemented by your administrator, they will define the way your system is displayed. Since personalization is all about you, tweak the solution into your solution so that it best suits your working style and uniqueness.

As an end user, you can for example, add your own background image, use drag and drop to easily move screen sections to another location, set the regional time settings, select whether to display additional onscreen explanatory text, and manage passwords and certificates.

Go a step further in your personalization experience by adding, changing or hiding labels and adding mashups. You can also create new queries, change the default queries, and organize the queries in each screen to save time. The personalization settings that you make on the screen take effect immediately. You can go ahead and accomplish your daily activities without having to restart the system. If you ever decide to go back to the original personalization settings, you can set it back to default.

Personalize your SAP Fiori Client [page 92]
Learn how you can personalize the solution with your preferences regarding system setting, navigation settings, content, and layout settings with SAP Fiori client.

2.14.1 Personalize your SAP Fiori Client

Learn how you can personalize the solution with your preferences regarding system setting, navigation settings, content, and layout settings with SAP Fiori client.

2.14.1.1 Personalize Your Screen

You can personalize your screen in the Fiori Client UI.

The following table gives a list of all the UI elements that you can personalize:

Action	UI Elements
Show and Hide	• Fields in Header, Object List, Search Filter • Sections • Panes • Tabs • Buttons, Menu Items
Rearrange	• Fields in Header, Object List, Search Filter • Sections • Panes • Tabs • Menu Items
Sort and Group	Columns

On the Fiori Client UI, click your profile on the top right corner of your screen, and select *Start Personalization*. The system opens the *Personalization Mode* side pane.

In the personalization mode, you can do the following:

- To select an area on the screen, right click (for Windows) and tap with two fingers (for Mac).

- To directly edit an area, use [edit icon] . The selected area is indicated by [edit icon] and a yellow border. The corresponding rows,columns, or buttons appear on the right pane.

- To hide or show fields, use [eye icon] .

- To navigate to the parent section, use [left arrow icon] .

- To navigate to the child section, use [right arrow icon] .

- To change the sequence of fields, drag and drop them on the right pane using [drag icon] .

For the changes to take effect, click your profile, and select *End Personalization*. To discard the changes, select *Discard Personalization Changes*.

2.14.1.2 Work with Implicit Personalization of Data Set View, Column Width and Action

The system remembers your behavior as you navigate the data set view, change the column width and the action choice you make and displays the selections made the next time you log in.

- **Data Set view**:
  Whenever you change the data set view /visualization, then the system remembers the change and shows it the next time you log in to the system. For example, when you change from list view to chunk view, the next time you log on to the same device, you will see the data set in chunk view.
- **Column Width**:
  Whenever you change the column width in the data set, the system remembers the change and shows it the next time you log in to the system.
- **Last Performed Save Action on Create**:
  The system remembers the choice of save action selected by you when you create an object on a specific device. For example, in the account creation screen, the default selection is *Save*. If you select the save option as *Save and Open* during account creation, then the next time you create an account (on the same device) you will see *Save and Open* as the default selection.

If last selected action is hidden in certain scenarios, then it does not show as the default selection. Instead the default selection of quick create component is seen. For example, *Save* in account creation screen.

2.14.1.3 Personalize the Homepage Settings

Homepage setting is available as a gear icon on the top right.

Select/tap the gear icon to personalize your homepage settings.

You can do the following under homepage settings:

- Disable homepage as start page
  Administrators and business users not actively using the homepage, can disable homepage from being the default landing page. With this setting, the first work center view defined for the user or role in user interface, becomes the default landing page for the Fiori client.
  In the personalization and adaptation mode on homepage, the user and the administrator can uncheck the checkbox *Set homepage as the start page* under settings.
- Show cards in groups
  Administrator can provide grouping of cards for a user role by selecting the checkbox *Show cards in Groups* under home page settings.

> **i** Note
>
> Add Group for cards is only available if it is enabled by your administrator.

2.14.1.4 Customize Solution with Your Brand

The Theme Builder is a tool to create a theme to match the branding of your company. Theme builder gives you advanced control over the look and feel of your app.

Context

You can customize the look and feel of your solution with your company branding using the Theme Builder. There are four themes available:

- SAP Belize
- SAP Belize Deep
- SAP Quartz Light
- Saphira

SAP Quartz Light theme is the default theme available and provides consistent look-n-feel across all SAP Customer Experience solutions.

> i Note
>
> Only if you're using Blue Crystal theme, you see the transition to SAP Quartz Light, as SAP Blue Crystal Theme is retired and not available for selection. However, if you're using the SAP Belize, SAP Belize Deep or a Custom theme, then you aren't affected by the change.

Your administrator can enable the themes under *User menu*, navigate to ▶ *Settings* ❯ *Branding* ❯ *Theme Builder* ◀.
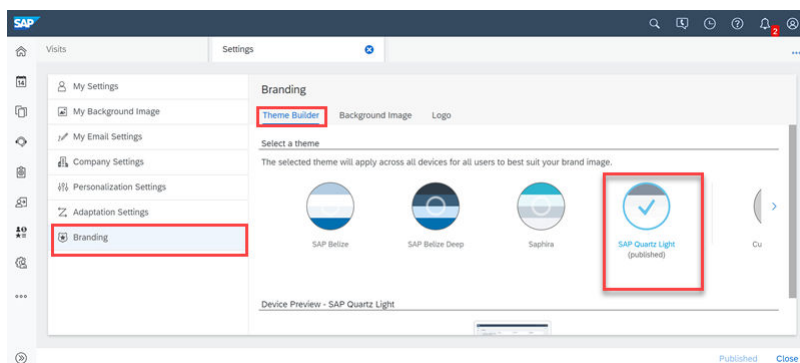
> i Note
>
> - SAP Quartz Light theme selection can only be done on desktop and laptop.
> - It's recommended to use SAP Quartz Light theme with the company setting - Enable New Navigation Menu in Fiori Client
> - For the first time user, a theme is selected and published by default and applied for all the end users. However, if you want to define your own custom theme, then click *Custom Theme*.

Under custom theme, you can make finer adjustments to the color in theme builder via the color picker.
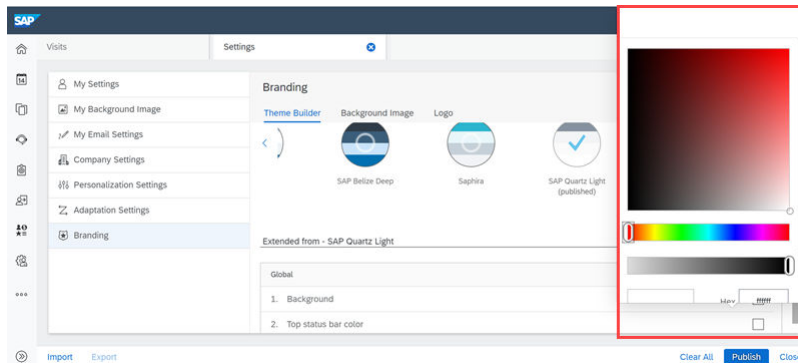
To create a custom theme for branding, follow these steps:

Procedure

1. Go to *User menu* and navigate to ❯ *Settings* ❯ *Branding* ❯ to access the *Theme Builder*.
2. Choose *Custom Theme*. You can see the list of UI elements that you can edit for the company brand. Default values are set to the previously published theme.
3. Select the hex code or the color box. Selecting the color box shows the color picker overlay and you can change any color there for the UI elements listed, to a desired state color. For example, you can choose ❯ *Global* ❯ *Background* ❯ and change to the background color you want.

   You can view the changes in real time as you change in the UI element.
4. Select *Save* to save the changes.

   You have the *Clear All* button to remove all the custom theme selection in one go. You can also see the original theme from which the new custom theme is created. For example, If the published theme is SAP Fiori, and then you chose to select the custom theme, you can see that the custom theme is an extension of the SAP Fiori theme.

   > !Restriction
   >
   > Before you select the custom theme from a published theme, you need to refresh the screen to see the correct theme from which the new custom theme is created.

5. Your administrator can then publish the theme for all the user by selecting *Publish*. When the selected theme is published, the check mark appears for custom theme.
6. If you don't like the changes you made, select *Revert* to revert to the previous published theme.
   - You can also export a custom theme from the test system and import it into the production system.
   - Custom theme is available only in the SAP Fiori client (responsive user interface), both in the browser and the extended apps.

Results

Using this tool, you can create a theme to match the branding of your company. The following solution areas can be customized under custom theme:

- Global
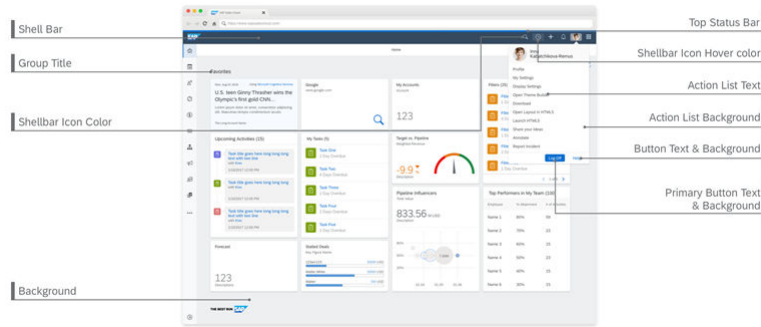
Global
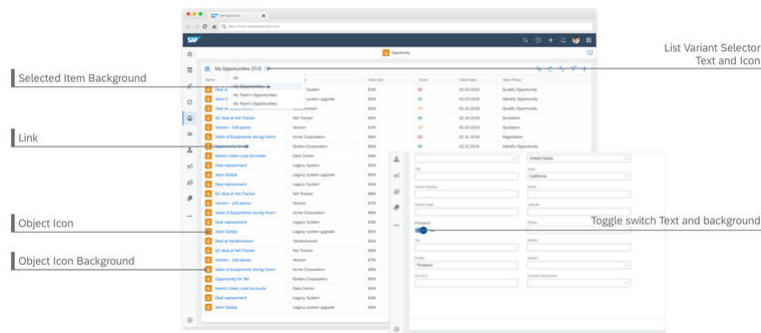
- Navigation Pane

Navigation Pane
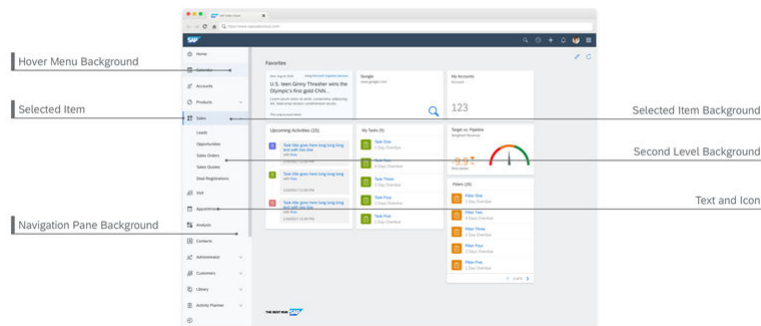
- Flag, Favorite, and toolbar

Flag/Favorite Button Tab & Toolbar

Selected Tab Icon/Text Color
Popover Background Color

Tab Background Color
Tab Icon/Text Color

Footer Primary Button / Button
Toolbar Background Color
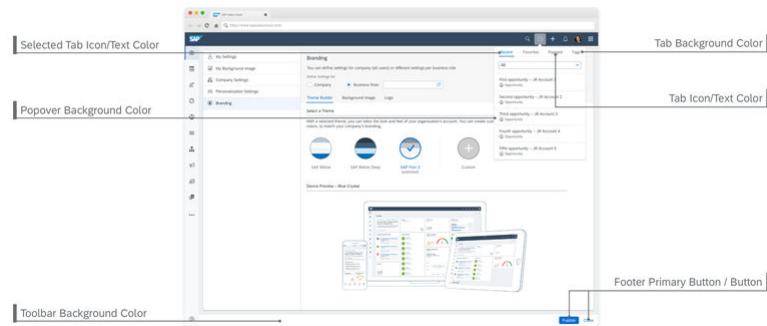
- List and Table view

List & Table

Column Header Background

Column Header Text

List Background

- Detail View

Detail View

Header Icon, Button and Text

Selected Navigation Tab

Navigation Tab Text

Navigation Tab Background

Header Background

Tab Overflow Icon and Arrow Background

Header Fields
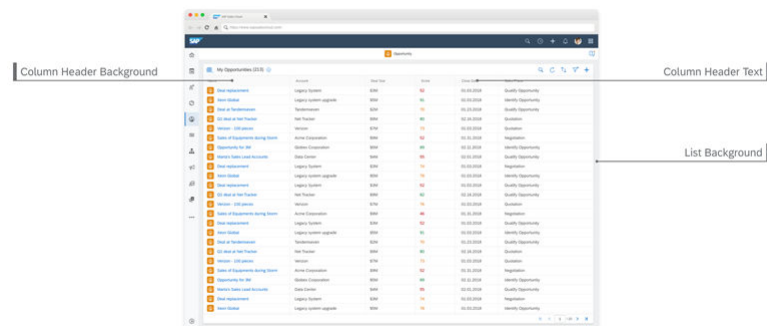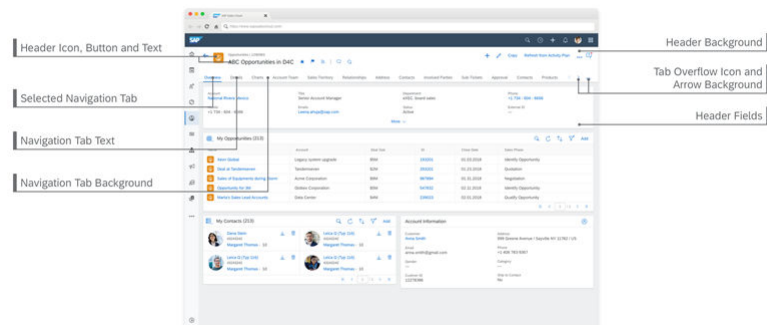
> **i Note**
>
> All the custom changes made under the detail view section, are reflected in the new quick view and the detail view on the user interface.

- New Quick View

Quick View
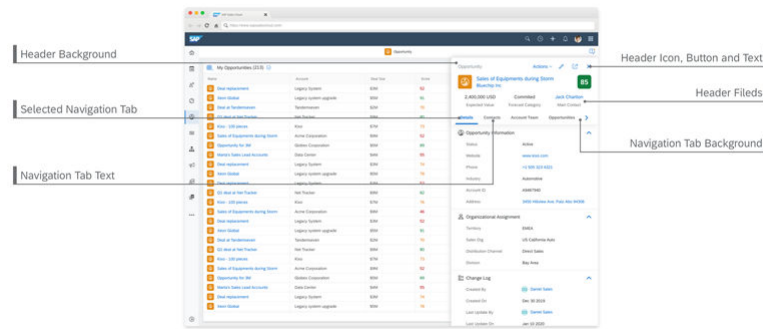
- Global Search

Global Search Window
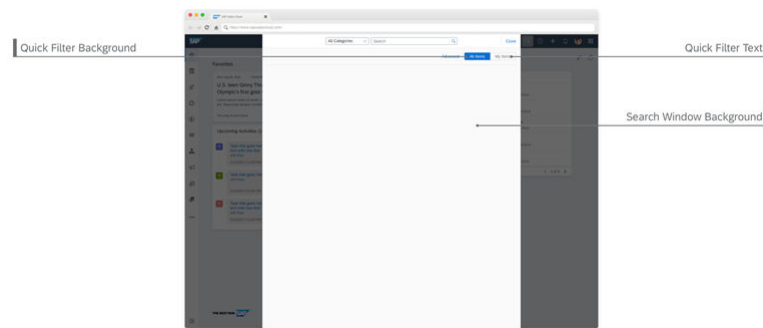
- Logon Page

Login Page
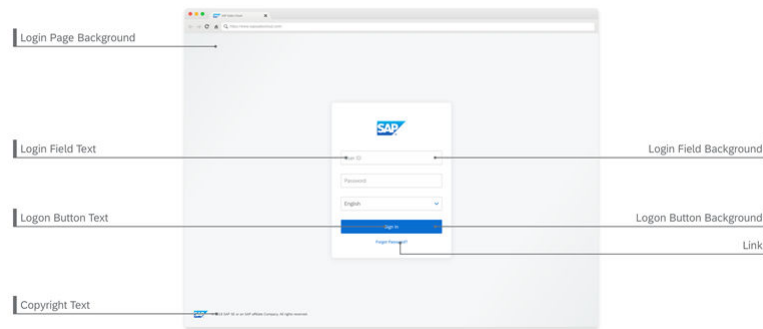
- Multi-Tab Navigation bar

Multi Tab Navigation Bar
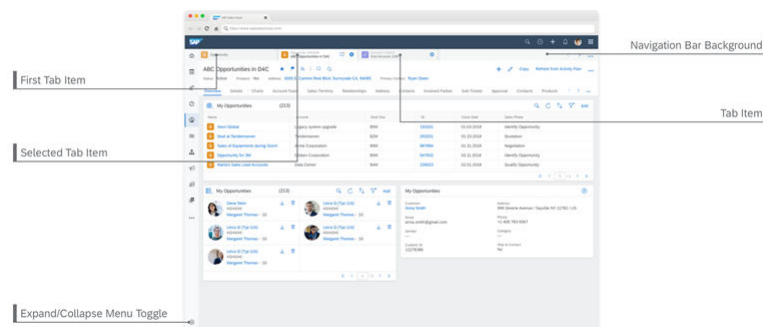
- You can set your own branding on the logon page in browser. Logo and background image on logon page can be customized. This change has been done in Fiori client UI to provide a consistent user experience. Your administrator can set up the customization in the branding section under *Settings* in Fiori client.

> → Remember
>
> The image size must be less than 1 MB.

2.14.1.5 Create and Organize Queries

Learn the different ways you can work with queries on each screen.

2.14.1.5.1 Create New Queries

Learn how to create a new query.

1. Go to the screen where you want to create a new query. Select the filter icon. Enter the parameters for the new query. Select *Save Query As*.
2. In the pop-up box, you can give the query a name, and opt to make it your default query.
3. Select *Save*. A new query is created, and it appears in your default selection drop down list.

2.14.1.5.2 Organize Queries

Learn how to organize the queries you have created for easy access.

1. Go to the screen where you want to organize your queries. Select the filter icon ▽ . Click *Organize Queries*.
2. In the dialogue box that pops up, you can see all the queries available for the screen. Perform the following actions:

- To select a query as your default query, click the radio button next to the name of the query. The selected query appears as the default query in your default selection drop down list.
- To remove a query from the list, select the checkbox next to the name of the query.

> **i Note**
>
> You can only remove the queries that you have created, and not the once which are pre configured in the system.

- To turn on auto execution for the *All* query, deselct the *Disable* checkbox against it. The *All* query is disabled by default in the value help.
  Disabling the auto execution improves the user experience and performance. You don't have to wait till the query is executed, to interact with the UI. For example, if you want to search for a specific term, you can quickly do so.
- To hide a query from the list, select the *Hide* checkbox next to the name of the query. To make the query available again, deselect the checkbox.

3. Select *Save*.

2.14.1.5.3 Click-to-Load Queries

You can control the queries that take a long time to execute from automatically loading by using advanced search and narrowing down the potential result set, before executing the query.

Open advanced search for data lists and select *Organize Queries*. In the dialog box that opens up, select the queries for which you want to disable auto initial load.

Override contextual values in value help by creating your own query

In many scenarios you may want to override the context with which the value selection on a field opens up, and create your own query. This allows you to search for field values other than the default field value for the business object.

For example, when searching for a serial Id in a ticket, opening the value help for Serial ID field sets the customer's context from the ticket. However, service agent may want to search for a serial Id for US based accounts beginning with 1. Agents can now create a custom query for this, thus overriding the contextual query to a broader result set.

2.15 Calendar

You can create new appointments, visits, and phone calls in the calendar. You can also quickly locate and filter information by work week, day, week, month, and agenda and also by type and by status.

Your calendar shows all of your appointments, visits, and phone calls. Each one is color- coded, based on its status. You can even view another colleague's calendar or the calendar for your team.

Got a minute? Check out all the calendar features in this video!

2.15.1 Use the Calendar

Create appointments, visits, or phone calls right from your calendar.

Context

You can create appointments, visits, or phone calls on the fly right from your calendar. Here's how:

Procedure

1. Depending on the device you are using, select or long press on a block of time in your calendar or choose
   the plus icon (+).
2. Select the item type that you want to create.
3. Enter the details and save your entries.

Results

Your appointment, visit, or phone call appears in your calendar.

2.15.1.1 View Other User's Calendars

The default view shows your calendar with your activities. Learn how to see the calendar of any of your team members and find out their schedule.

1. Select the user icon at the bottom right and choose *Other Calendars*.
2. Search for and select the name of your colleague. Your calendar is replaced by your colleague's calendar.
3. After you have checked your colleague's schedule, choose *My Calendar* from the user icon to see your calendar view.

> → Remember
>
> It is not possible to display more than one calendar at a time.

2.15.2 Use the Team Calendar

Managers can use the team calendar to get an idea of their team's activities for the day and get coverage in the case of illness or vacation time.

This one-minute video shows you how useful the team calendar can be!

2.15.2.1 Reschedule Activities in the Team Calendar

When a scheduling conflict arises, you can reschedule your team's activities quickly and in one place, on the team calendar.

In the team calendar, you can switch the employee responsible for an activity from one team member to another with drag and drop.

> i Note
>
> If you use add-ins to synchronize your e-mail with SAP Cloud for Customer, your e-mail software only defines the organizer of the activity. When you synchronize, your SAP solution uses the name of the organizer as the employee responsible as well. Therefore, if the original employee responsible was also the original organizer of the activity, the new employee responsible becomes the organizer.

All other parties involved in this activity remain unchanged.

Related Information

E-Mail Add-Ins [page 933]

2.15.3 Display Workweek and Start Day on Calendar Based on Locale

For each employee, you can maintain workweek and start day based on their locale. The calendar reflects those preferences accordingly.

Prerequisites

Administrators have enabled resource scheduler for employees to define working hours.

Context

Procedure

1. Open the detail view of an employee and go to *Working Hours*.

> **i Note**
>
> If the *Working Hours* tab is not visible, you can use *Personalization* or ask your administrator to *Adapt* the master layout.

2. Under *Working Period*, click *Add Row*.
3. Define the validity period for this working period.
4. Choose *Working Day Calendar* based on the employee's location.
5. *Save* your entries.

Results

The calendar displays workweek and start day based on the employee's locale that you have defined.

> **i Note**
>
> If the *Working Day Calendar* is not defined, the calendar by default displays Monday as the first day of a five-day workweek.

2.15.3.1 Configure Resource Scheduler

Administrators can enable resource scheduler for employees to define working hours.

Go to ▌ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▌ *Edit Project Scope* ❯ *Questions* ❯ *General Business Data* ❯ *Resource Scheduler* ▐ to find the corresponding question about enabling resource scheduler.

2.15.4 Personalize Visible Activity Types on Calendar

You can personalize your calendar to filter out activity types that are not relevant for your calendar display. Your preference set through *Personalization* becomes the default every time you access the calendar.
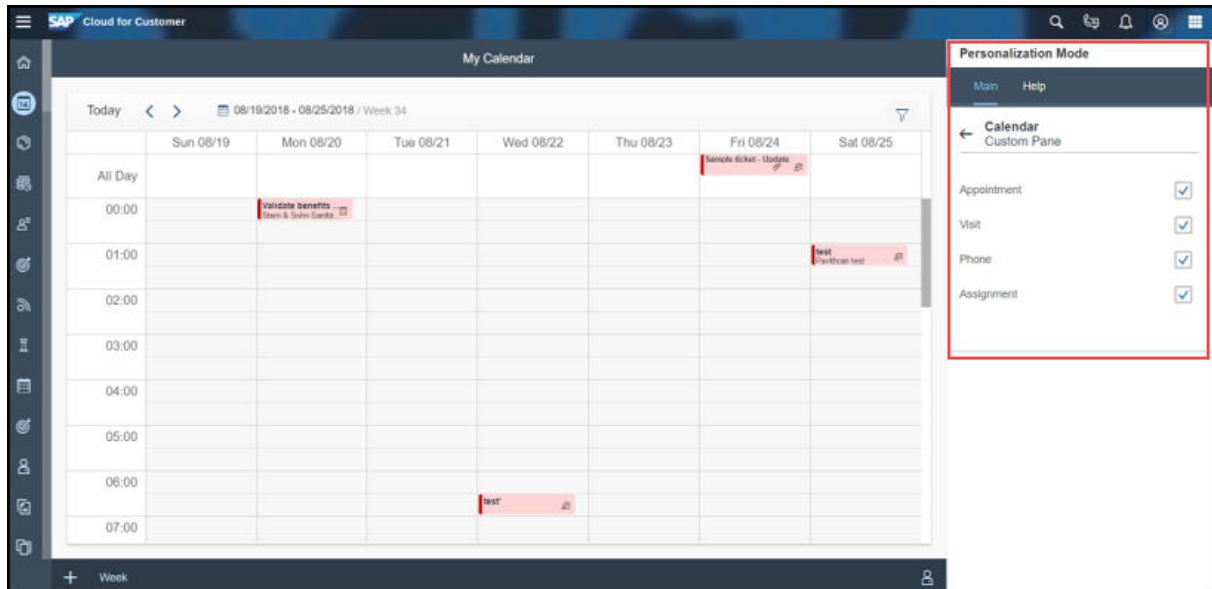
2.15.5 Calendar Actions Harmonized for Enhanced Usability

Calendar actions are grouped and placed at the top for better discoverability and user interface consistency across the application.

As a prerequisite, your administrators must go to *Company Settings* and toggle on the option to *Show the Actions Menu on the Top Right*. This setting applies to calendar, resource scheduler, and other objects.
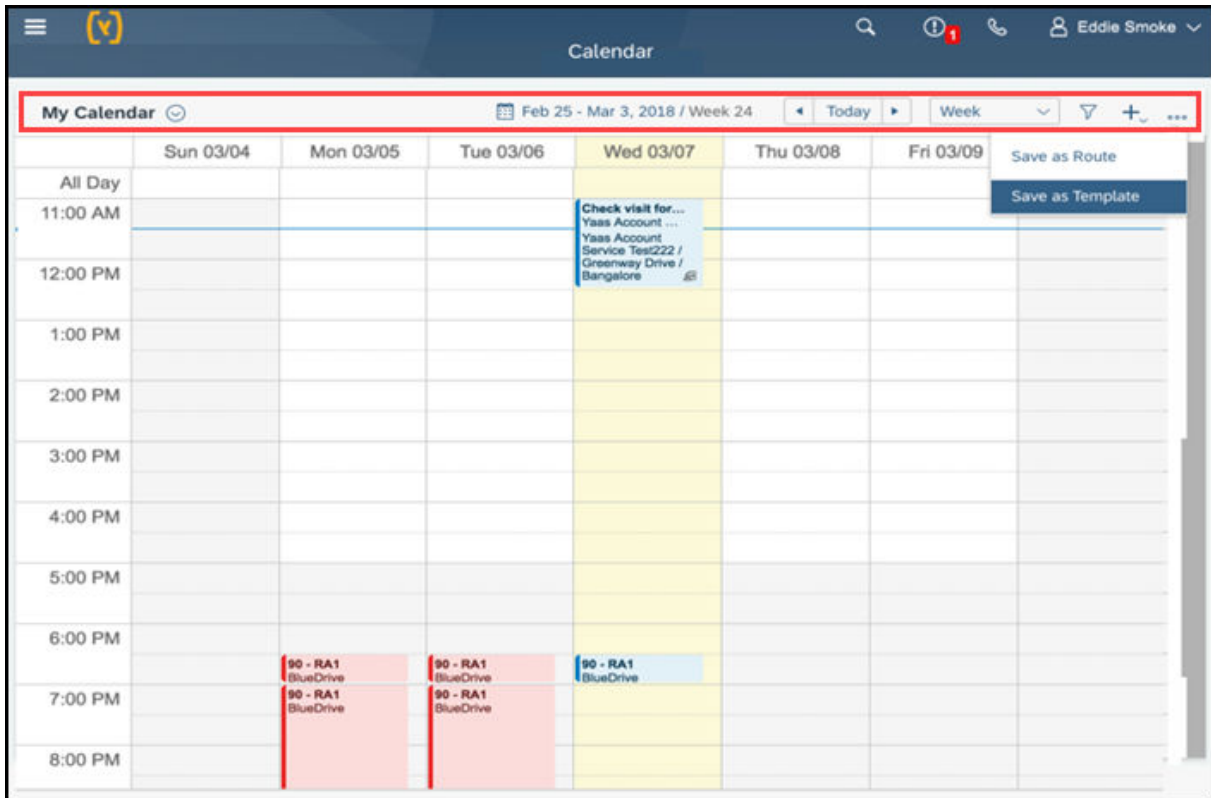
2.15.6 Personalize Calendar

You can personalize your calendar to show calendar information based on your involvement.

Context

Currently, when you create an appointment for another user, the system sets you as an organizer and the other person as the owner. Both the organizer and owner can see the appointment entry in their system calendar. However, the organizer is just setting up the appointment and doesn't attend it. So, if the organizer sets up a series of meetings, then the entire calendar gets blocked and others can't schedule a meeting with the organizer. This blocked calendar is misleading as the organizer is free. To address this issue, the calendar can now be personalized to show only the organizer's calendar entries.
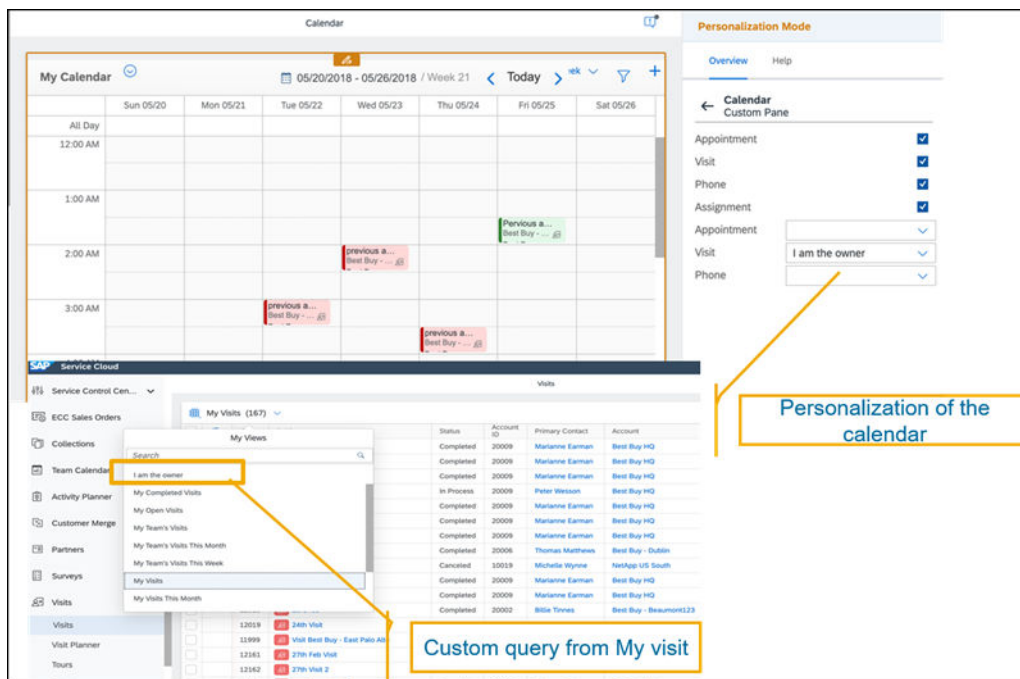
You can create a custom query from the object list. For example, visit, appointment and phone call, and use this query to personalize the calendar. You can personalize your calendar with the following steps -

> i Note
>
> Only queries created out of My **activity**, for example My visit is available in the calendar for personalization.

Procedure

1. Create a custom query from the My "activity" query in the list view.
2. Go to the personalization mode for calendar and select the query.

   Calendar personalization isn't available in the offline mode.

2.16 Homepage

See relevant information and activities, and plan your day with the homepage. And get a high-level visual overview of your sales data.
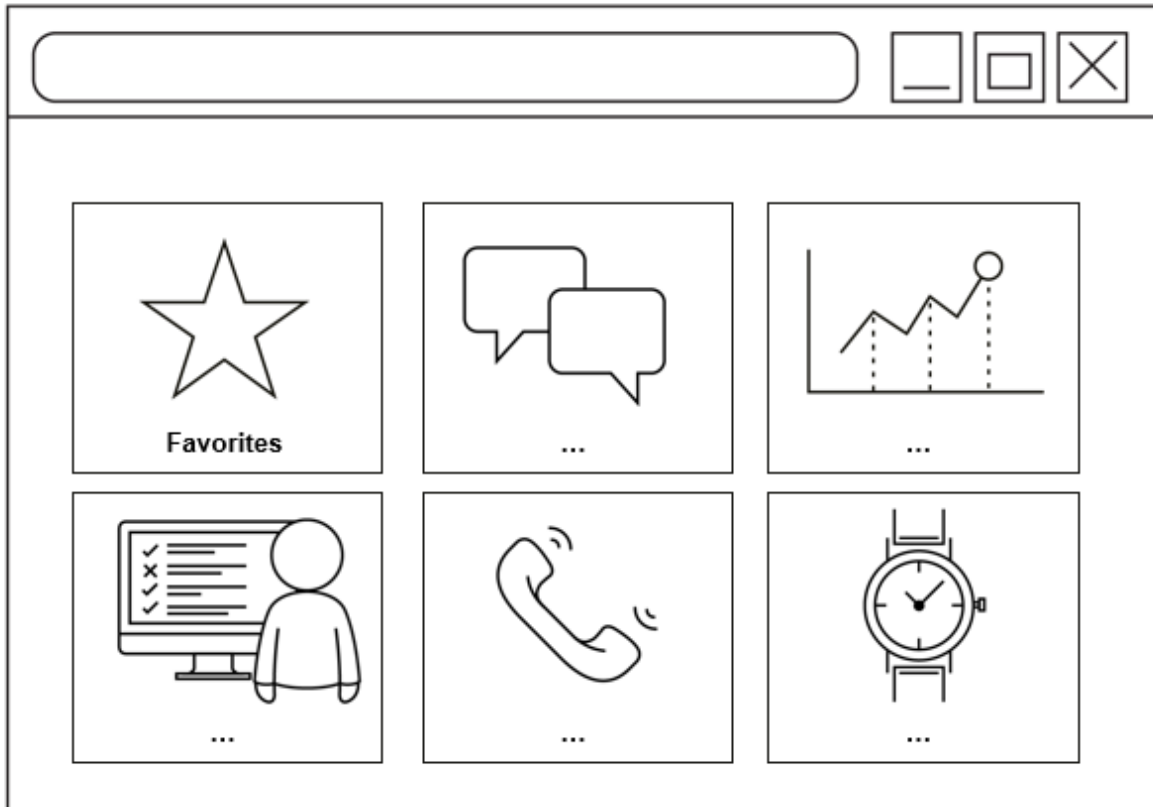
Homepage displays preconfigured business cards based on your business role. You can click a card to see its details. For example, you can click *Today's Activities* to see the details of your schedule and activities for today. You can work with the different cards types, view report details, and also personalize the cards you want to see on the Homepage.

The news section on the homepage helps you prepare for appointments and phone calls, by displaying stories about the accounts related to your scheduled activities. The shelf card shows Flags and Favorite items. The Feeds card shows the feed updates. Use the dashboard cards to drill down and view details and increase your visibility into transactional data, KPIs, and reports. You can also do mark ups, add notes, and send e-mails right from the homepage.

Homepage content is cached to improve the sign-in experience. Content caching loads the homepage cards faster and retrieves the homepage content efficiently, keeping the user experience interactive. You can access the homepage cards with no updates immediately and don't have to wait for the homepage to load completely before using it. A visual transition shows the information being updated in the background. You can see the cached information in gray. he cached data is shown immediately and any updates to the homepage cards automatically occurs in the background. You can see the previous information while the system updates the cards with latest information. This transition takes no more than 5 to 10 seconds.

i Note

Content caching is only available on sign-in.

2.16.1 Scope and Configure the Homepage

Administrators can configure and adapt the homepage for each user and business role.

When you log on as the administrator and go to the home page to manage the make changes, you have two options- *Adapt* and *Personalize*. With *Adapt*, you first choose the user role and then make changes for that user role. *Personalize* allows you to make individual changes that you want for yourself and are also available for every user to personalize their homepage.

Log on as the administrator and go to the home page.

Select the pencil icon and then Adapt.

→ Remember

- Adapt feature isn't available in smartphones and in offline mode.
- Card navigation in offline is limited to *Today's Activities*, *Visits*, and *Custom report Floorplan* cards in browser and tablet.
- For an optimal performance experience, you get a warning message when you exceed the recommended number of KPI and Report cards on the homepage. The recommended maximum number of KPI cards supported is 10 and the maximum number of Report-based cards (Custom pattern cards like Bar Chart cards) supported is 4. You have the option to add additional cards, but it impacts the performance.
- There's no limit on recommended number of List cards, Tool cards, and Custom cards.
- Scorecard tab while selecting cards isn't available.
- Using *Search*, you can find a report but you can't open that report.

2.16.1.1 Select User Role

The administrator can define the home page for each role.

Context

If the administrator does not define a home page for a role, the default home page layout is maintained. To select a role and start defining the home page for all users with that role, do the following:

Procedure

1. Log on as the administrator and go to the home page.
2. Select the pencil icon and then *Adapt*.
3. The list of roles that appears are the business roles that you created when you set up your system.
4. Select a role whose home page you want to define and select *Go*.

2.16.1.2 Define Homepage Settings

The administrator can access homepage setting as a gear icon on the homepage.

As an administrator, under homepage settings you can enable the users or roles to group cards on their homepage. To do so, check the checkbox *Show cards in Groups* under settings. You can also change the homepage to show as the default start page when the user logs in. To do so, you can uncheck the checkbox *Set Homepage as the Start Page* under settings.

2.16.1.3 Define Cards for a User Role

The administrator can define the cards for each role under adapt mode.

Procedure

1. In adapt mode, select a role and the different card types (KPI, custom, report, filter, and tools card) for the user role.
2. To add cards, click, or tap the+ icon, located at the end of each card. As the administrator you have two options for adding different cards-
    1. **Add Existing card**: Select the different cards you want for the user or business role from the catalog.

2. **Create Custom card**: You can create the following type of custom cards:

   o **URL card**: You can launch any URL directly from the URL card. The URL opens in a new tab.

   o **Floorplan card**: With floorplan card option, you can create a card that launches any screen for a work center or detail view in the solution that the user wants. Custom card also includes custom screens the user has defined.

   o **Ticket Creation card**: With the ticket creation card, you can create a new service ticket. Clicking the card launches a guided activity floorplan (GAF). Once you've created the ticket, you can view it under ▎ *Service* ❯ *Tickets* ❯ ▎ worklist.

   o **URL Mashup card**: With the URL mashup card, you can open URL mashups from the homepage. While configuring the card, you can choose the mashup to configure from the mashup value help.

   o **HTML Mashup card**: With the HTML mashup card, you can open HTML mashups from the homepage. While configuring the card, you can choose the mashup to configure from the mashup value help.

   o **Message card**: The message card can be used by the administrator to publish messages for business users. As a part of the configuration, the administrator can set the message title, message description, informational icon text, and the background color of the message card.

   o **Video card**: Video card can be used by the administrator to configure video links for the users. When you click the video link, it launches in a separate window. As a part of the configuration, the administrator can set the title, description, and time frame for the video card.

   > **i Note**
   >
   > Videos aren't stored as part of SAP Sales & Service cloud.
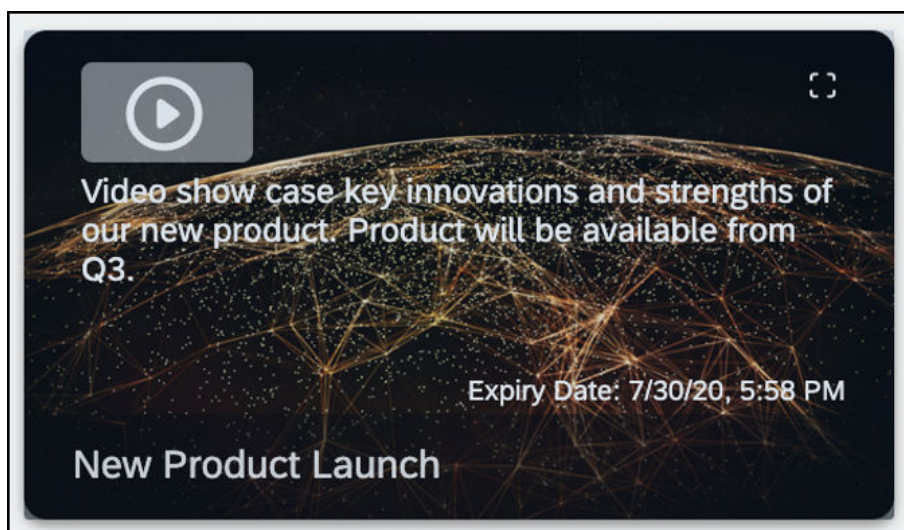
- **Kanban Card**: You can configure Kanban card on the homepage via adaptation. As a part of the configuration, the administrator can create a Kanban card for an object. Based on the object selection, the following information can be added sequentially -
  - Data set query.
  - Attribute (used for grouping on Kanban board and is restricted to attributes with only code list).
  - Visualization (Detailed or Vertical view in expanded or collapsed mode).
  - Value (You can add values and set color for each value.)
  - Display field and set the order in which the display fields should show.

The Kanban card helps teams manage and prioritize workflows effectively. Your administrator can create new Kanban cards as part of creating new custom card.

> **i Note**
>
> Kanban board visualization supports 2 columns, 3 columns, 4 Columns & 5 Columns.

The Kanban card layout on the homepage is available only on the desktop. When you click the title, you navigate to the ticket list view for the query. When you click a subheading, you navigate to the list view for the subheading query. For example, if you click Customer Action, you navigate to the list view for the query Customer Action. When you click an object under the subheading, you navigate to the object's detail view. You can view the Kanban card in collapsed and expanded mode.
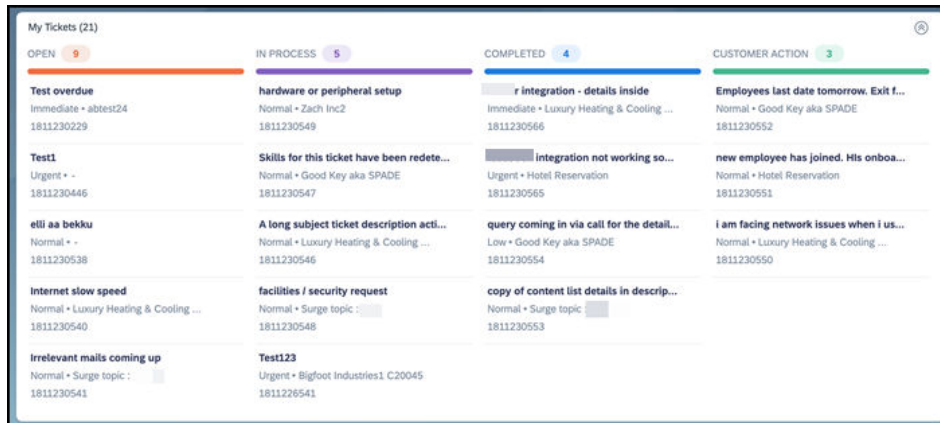
> **i Note**
>
> ○ Kanban board can be created only on editable data set queries.
> ○ You can't edit and delete a Kanban card.

As a prerequisite, the administrator must create the Kanban custom card via adaptation on the homepage and publish to make the Kanban card available for the users.

> **i Note**
>
> URL Mashup and HTML Mashup custom cards are only available in Fiori client.

Do the following steps to create a custom card:

- ○ Choose the custom card you want to create.
- ○ Add the required fields and click *Save*. Custom card created is stored in the card Catalog.

3. If you want the changes, select *Publish,* and if you don't like the changes you made, select *Revert*.
4. To go back, select *Leave Adaptation Mode.*

2.16.1.4 Define Settings for Each Card

As an administrator, learn how to define the setting for each card.

When you are in adapt mode, you can change the appearance of a card by selecting it. You can set the following attributes for a card:

- card Visualization
- Available
- Visible
- Specify a group for the card, if grouping is available for the role.

Then, save the changes.

2.16.1.5 Configure News Card

As an administrator, learn how to configure the News card.

Context

Configure the news card by either selecting the news source or by selecting the url for RSS feeds to show up on the user's news card.

The Google News API is deprecated and gives errors on the current news card. See the **Related Links** for more information. Therefore, the administrator can set up Bing News for all users and roles as the news card. You can buy Bing News APIs and enable it in the solution. See the **Related Links** for more information.

> **i Note**
>
> Bing News has different markets based on country/region and language. Right now, in the solution the market is preset only to US English for Bing news. This means that the business news is in English and from US.

Depending on what is the user's current news source, there are two use cases to change the news card to Bing News-

- If the user currently has Google news set up for the news card.
- If the user currently has URL for RSS Feeds selected for the news card.

> **i Note**
>
> If you opted for Bing news or opted for RSS feed or already on RSS feed as new source, switching back to Google news isn't possible.

Follow the steps to set Bing News as the news source:

Procedure

1. On the home page, select the edit icon at the bottom-right corner.
2. From the pop-up select *Adapt*.
3. Select the user role.
4. Select the news card.
5. Select the link *Switch to Bing New* under *Select News Source* if Google news is set up as the news card. Select API Key for Bing News if URL for RSS Feeds is set up as the news card.
6. Enter the API key and *Save*.
   - If the news source is Bing News, no news is shown on the news card in offline mode.
   - Bing news V7 is supported.

Related Information

Build anything with Google 🔗
Microsoft Azure Cognitive Services 🔗

2.16.2 Work with Card Types

You have five different card types (KPI, Report, Tools, Filter, and Custom card) available in the solution.

> **i Note**
>
> Table view isn't supported on the Homepage.

KPI Card [page 115]
  Based on the KPIs defined by your administrator, you can launch an interactive dashboard or KPI overview. KPI cards provide a snapshot of the key metrics. You can select the KPI card, to view additional details.

Report Card [page 119]
  A report card displays a graphical representation of a report.

Tools Card [page 125]
  Tools card is available online and enhances your daily productivity.

Filter Card [page 128]
  Filter card is a place where you can keep your custom queries as a list item to be run by the user on the home page.

Custom Cards [page 128]
  You can choose to create personalized cards to launch information from the home page.

2.16.2.1 KPI Card

Based on the KPIs defined by your administrator, you can launch an interactive dashboard or KPI overview. KPI cards provide a snapshot of the key metrics. You can select the KPI card, to view additional details.

The system uses this pattern for KPI views with a threshold value defined. The following KPI cards are supported:

- **Gauge Pattern**
  The system uses this pattern for KPI views with a threshold value defined.
  In Fiori Client, gauge helps extract complex information and gives a graphical view of how you're doing towards a goal. It shows KPI views with a threshold value defined and requires either target or threshold or both to be maintained. It requires at least one of the two (Target or Threshold) to be maintained. Odometer shouldn't be used as a pattern for minimize.
  There are three options here:
  1. When the target and thresholds are maintained-

1. When the current value is less than target value, the odometer split into three sections. Red section indicates alert, yellow section indicates warning, and the green section indicates on track or better.
2. When the current value is greater than target value, the odometer displays shades of green, indicating on track and exceeded by how much.

2. When the target is maintained but threshold isn't maintained-
   1. When the current value is less than target value, the odometer is split into two sections. Yellow section indicating warning and the green section indicating on track or better. The current value is displayed in the shade of yellow or neutral color.
   2. When the current value is greater than target value, the odometer is split into yellow and green sections. The current value is displayed in green.

3. When the threshold is maintained but the target isn't maintained-
   1. Odometer is split into three equal sections with red, yellow, and green color. The value is displayed in a shade of the color where the current value falls.
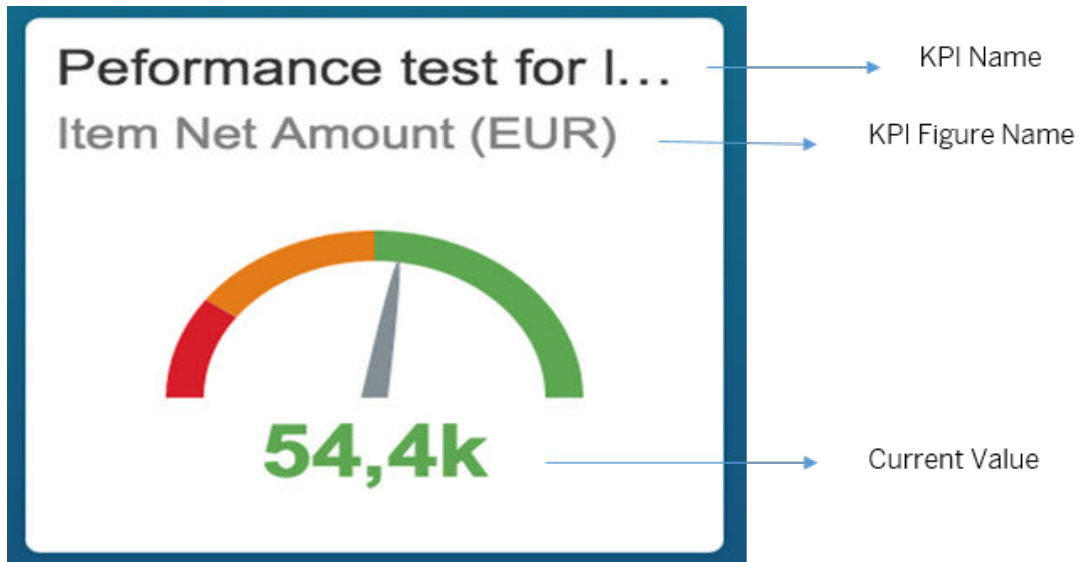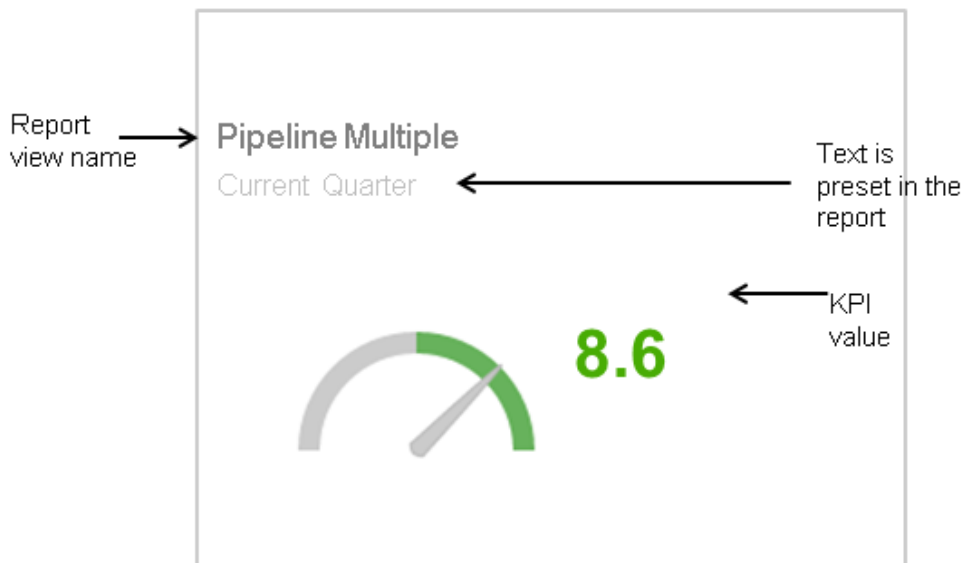
card appearance for gauge report pattern.

- **Progress Bar Pattern**

  This pattern is valid for KPIs and requires the target to be maintained. Only one color is displayed depending on what the current value is and whether the threshold has been maintained or not.
  In Fiori client, there are two options-

  - ○ No threshold maintained: When the current value is greater than target, you see that the color of the progress bar is green.

  - ○ Threshold maintained: Depending on the current value vs target value, there can be a maximum, minimum and in range value showing the progress bar in green, yellow, or red color.
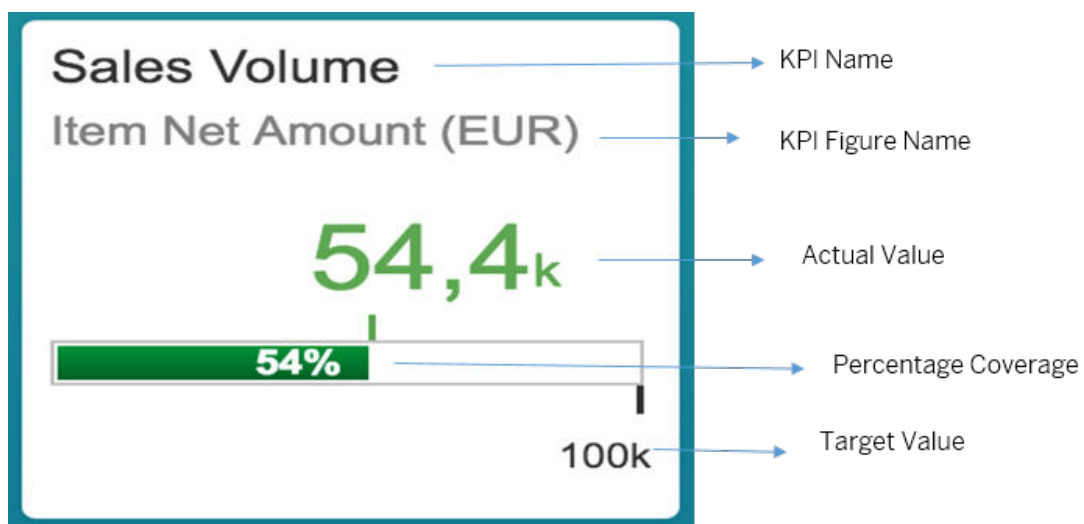
Card Appearance for Progress bar Report Pattern
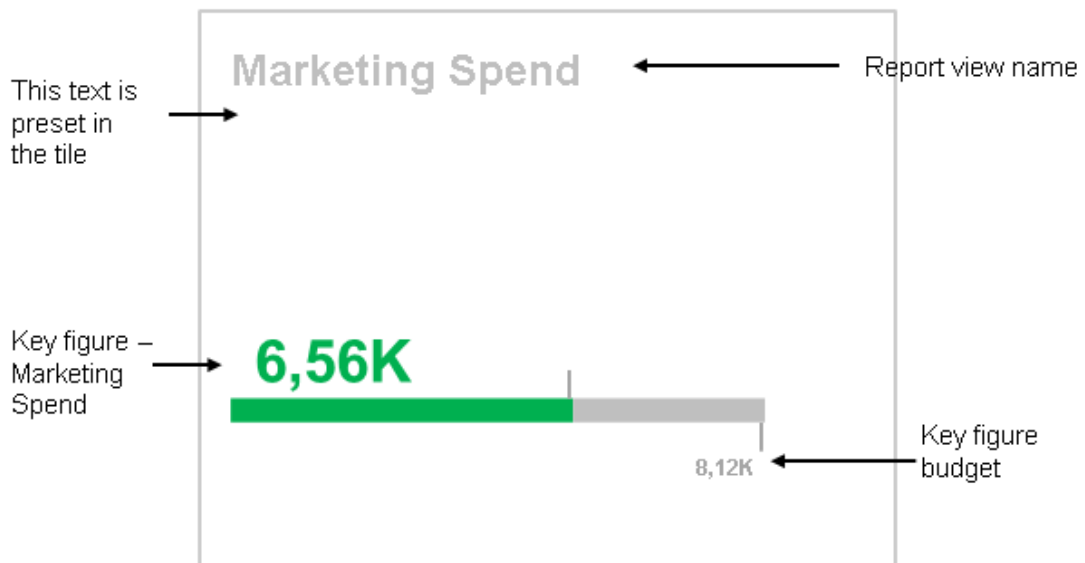
Card Appearance for Progress bar Report Pattern A
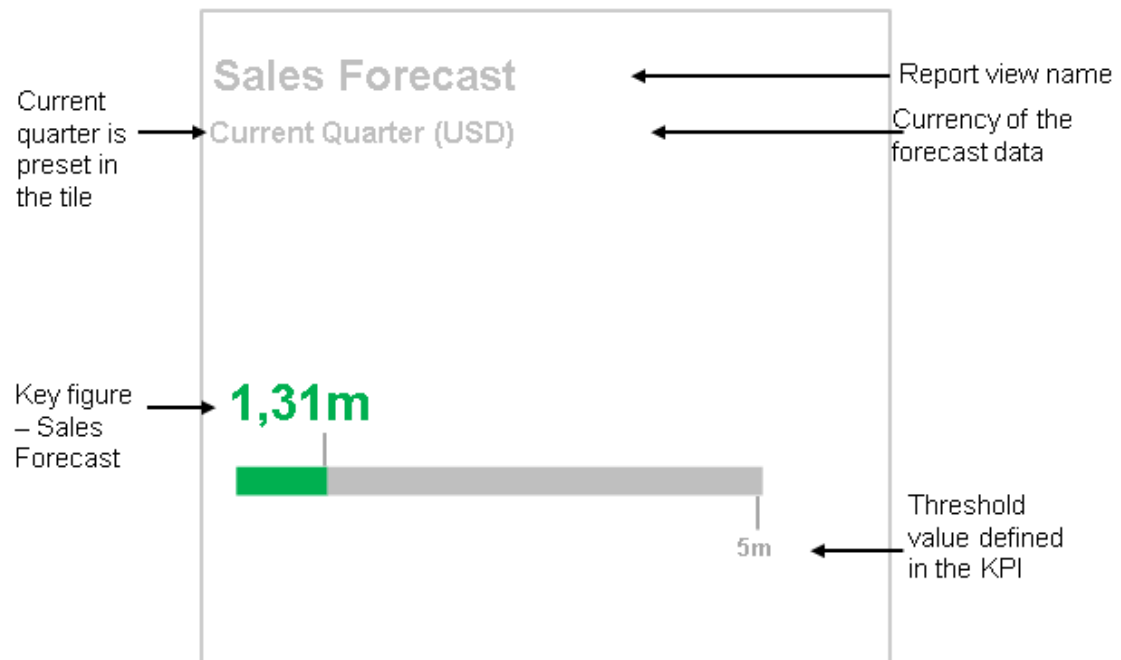
Card Appearance for Progress bar Report Pattern B

- **Percentage Coverage Pattern**
  This pattern is applicable for reports and KPIs, where KPI requires the target to be maintained and report should have two key figures.
  In Fiori client, in this card pattern you can see, the percentage deviation that is, how much percentage above or below target.

- In a maximize scenario, when the current value is greater than target, you see the complete circle in light green indicating that the current value exceeds target. The dark green color indicates by how much percentage it exceeds.
- When the current value is lesser than the target value, you see the percentage for the current value in neutral color or based on defined thresholds.
- In the minimum scenario, the color pattern is reversed.
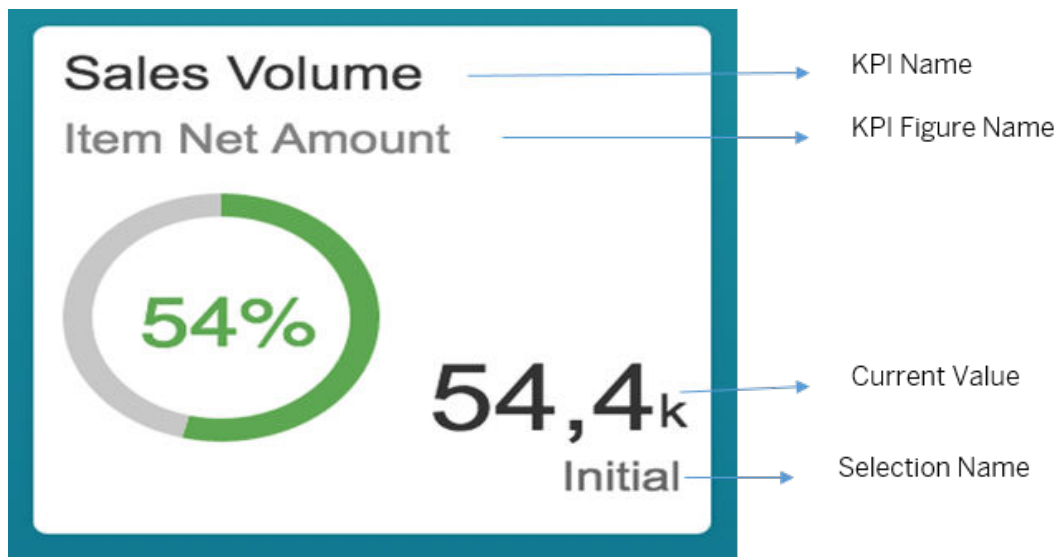
Card Appearance for Percentage Coverage Report Pattern in Fiori Client

Related Information

Personalize Your Homepage [page 141]

2.16.2.2 Report Card

A report card displays a graphical representation of a report.

You can select the report card, for detailed analysis of the report. For optimal performance, we recommend not to add more than 4 reports on the home page. Reports with table aren't supported. The following report cards are supported:

- **Absolute Value Pattern**
  The system applies this pattern to report views with one key figure. The key figure header appears as text at the lower right of the card.
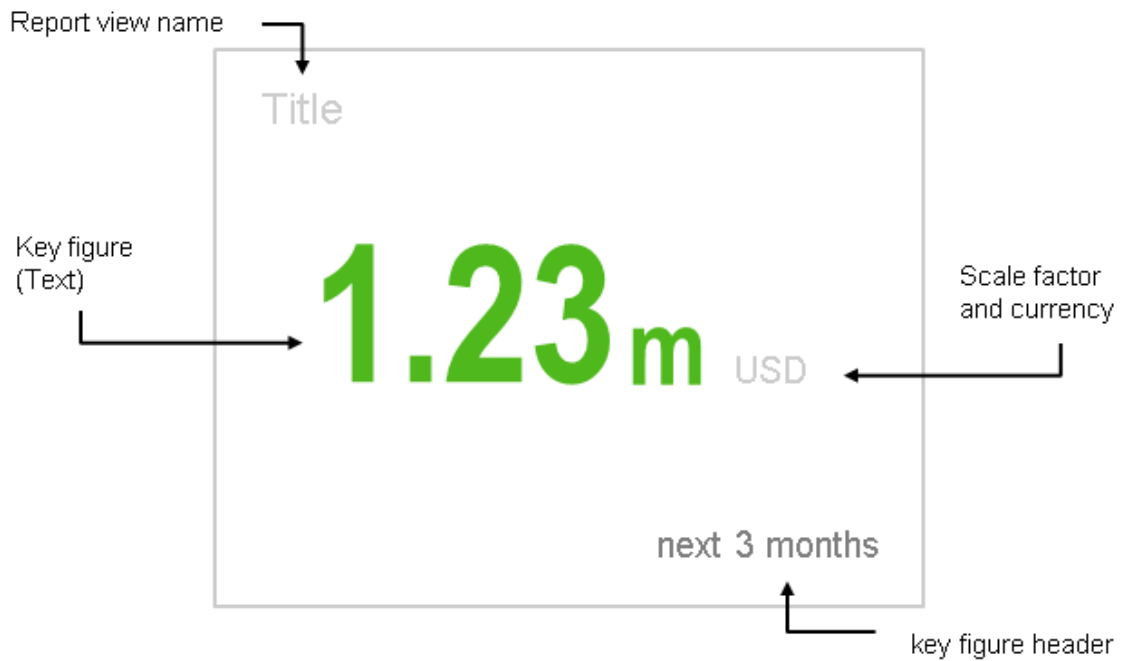
Card Appearance for Absolute Value Report Pattern

- **Percentage Coverage Pattern**

  This pattern is applicable for reports and KPIs, where KPI requires the target to be maintained and report should have 2 key figures.

  In Fiori client, in this card pattern you can see, the percentage deviation that is, how much percentage above or below target.

  - In a maximize scenario, when the current value is greater than target, you see the complete circle in light green indicating that the current value exceeds target. The dark green color indicates by how much percentage it exceeds.

  - When the current value is lesser than the target value, you see the percentage for the current value in neutral color or based on defined thresholds.

  - In the minimum scenario, the color pattern is reversed.
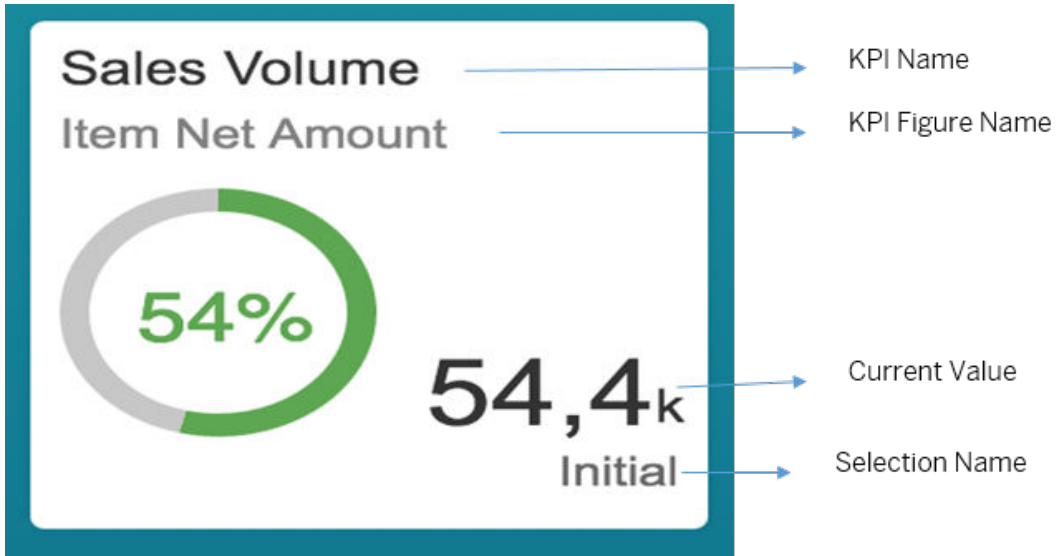
Card Appearance for Percentage Coverage Report Pattern in Fiori Client

- **Top Three Pattern**
  The system applies this pattern to report views with one key figure (without a total) and one characteristic.
  This pattern shows the top key figure values.
  In Fiori client, the data is represented as a comparison chart.
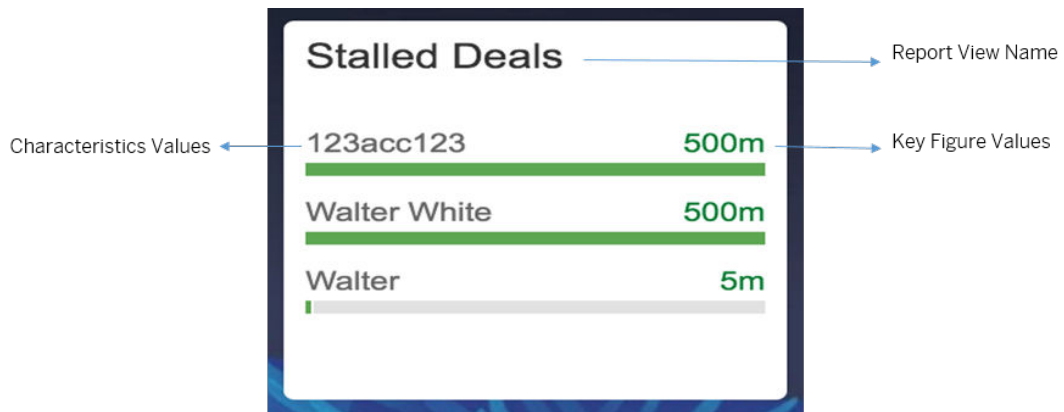
Card Appearance for Top Three Report Pattern
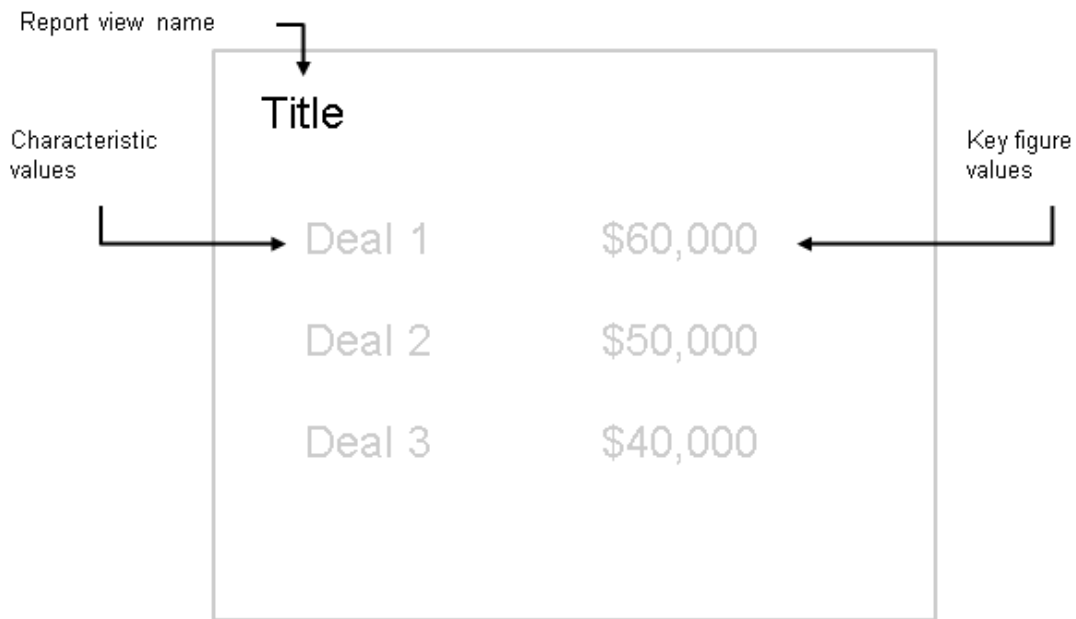
Card Appearance for Top Three Report Pattern

- **Aggregated Value Pattern**
  The system applies pattern four to reports similar to reports represented by pattern 3 (one key figure and one characteristic), which also include a result.
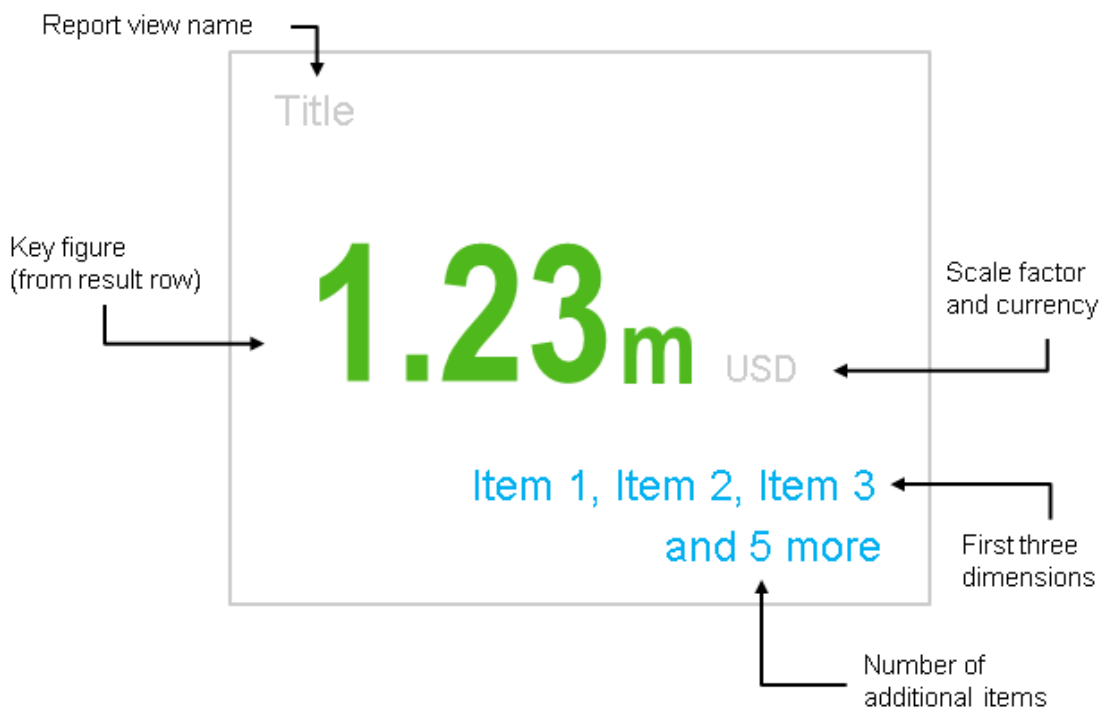
Card Appearance for Aggregated Value Report Pattern

- **Double Progress Bar Pattern**
  The system applies this pattern to report views with two key figures.

  > **i Note**
  >
  > This pattern isn't available in Fiori client.
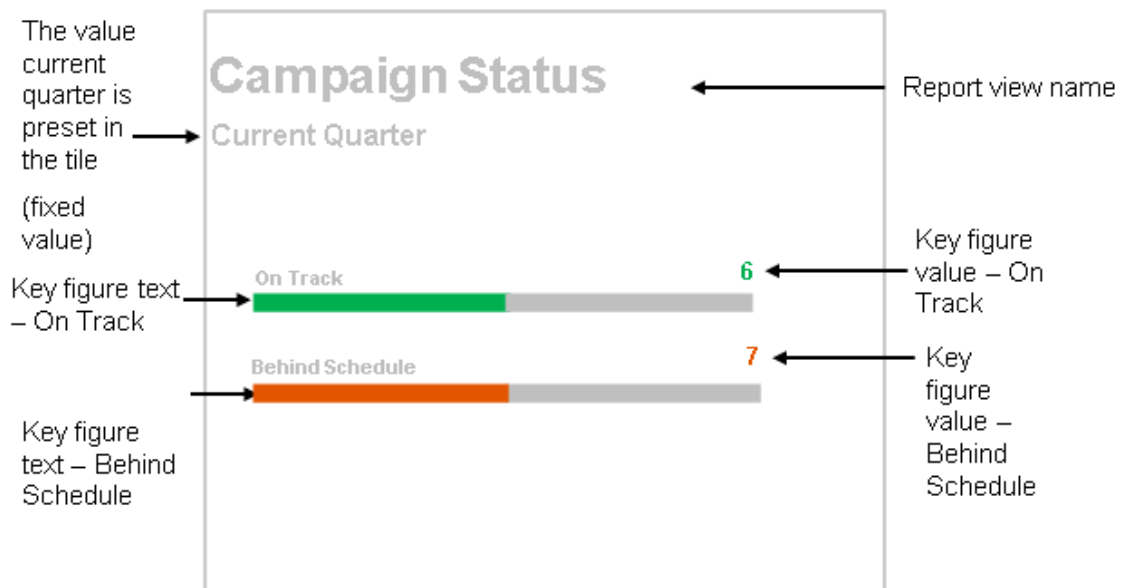
Card Appearance for Double Progress bar Report Pattern

- **Headline Pattern**

    The system uses this pattern for highlighting KPIs that have values outside the defined threshold parameters. (If above or below threshold, then text appears highlighted and as header). This card is ideal for use to display exceptional trending metrics.

    You have the option of choosing from any one of the two patterns.

> **i Note**
>
> This pattern isn't available in Fiori client.
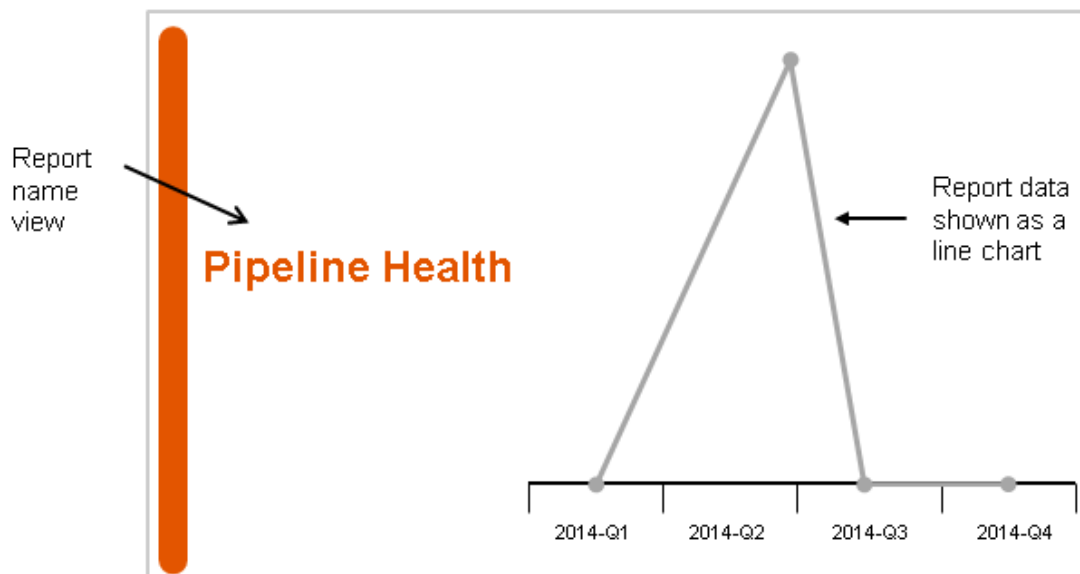
Card Appearance for Headline Report Pattern A
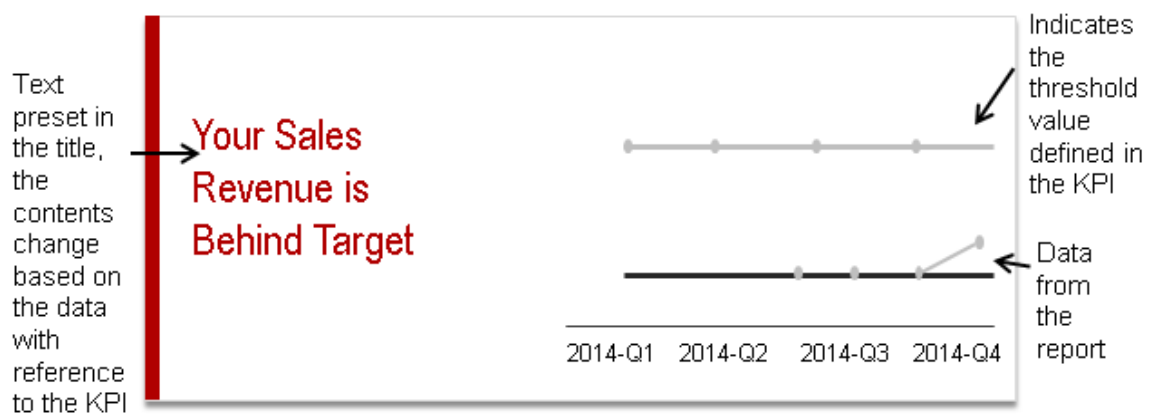
Card Appearance for Headline Report Pattern B

- **Trendline Pattern**

  The Trendline pattern is based on a report with 2 key figures and no dimensions. The system uses this pattern to visualize report output as a trendline.

  > **i Note**
  >
  > This pattern isn't available in Fiori client.
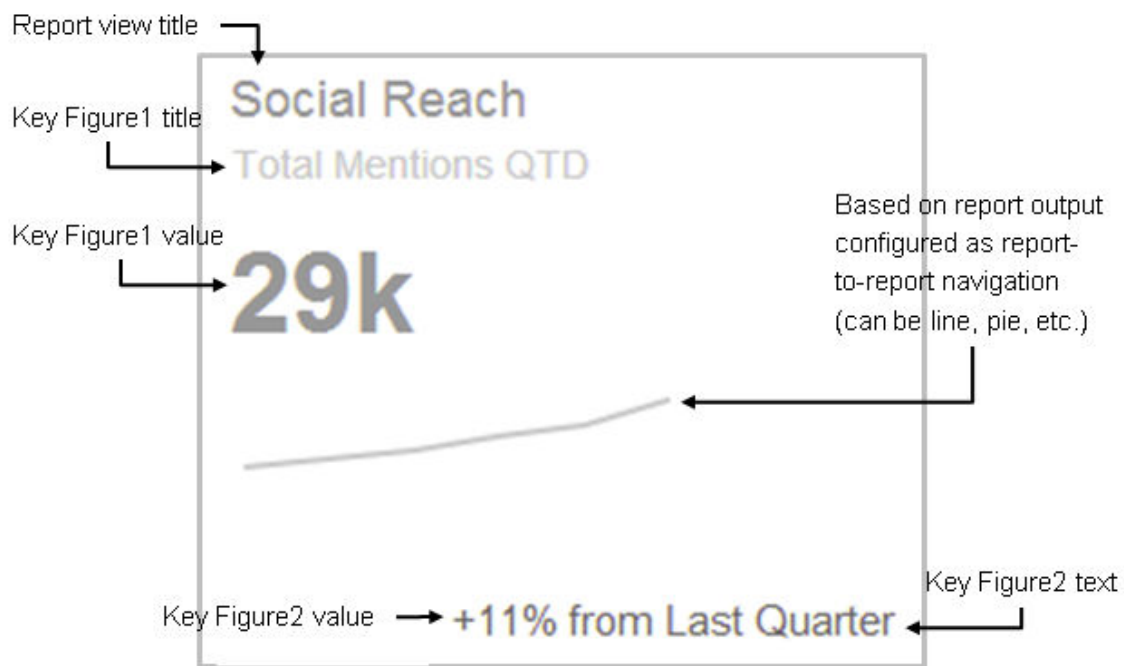
Card Appearance for Trendline Report Pattern

Related Information

[Personalize Your Homepage \[page 141\]](#)

2.16.2.3 Tools Card

Tools card is available online and enhances your daily productivity.

Tools cards include the following:

- **News card**: News card displays contextual news and RSS feeds.
- **My Upcoming Activities card**: My upcoming activity card displays a live tile with the upcoming events from your calendar. You can manage your events and calendars with the card.
- **My Tasks card**: My task card displays the optimized view of your tasks and clicking on the card allows you to quickly navigate to the task work center. The number of overdue tasks, if present, are displayed in a red font. Otherwise, tasks displayed are prioritized by Today, This Week, This Month, or as Open Tasks.
- **My Team Tickets card**: In my team tickets card, you see the information about your top 5 team members with the maximum number of active tickets, and a priority-based breakdown. When you click *My Team Tickets*, you navigate to the ticket list view for the query *Team Queue*. And, when you click a team member, you again navigate to the ticket list view for the query *Team Queue* but only see tickets for the team member.
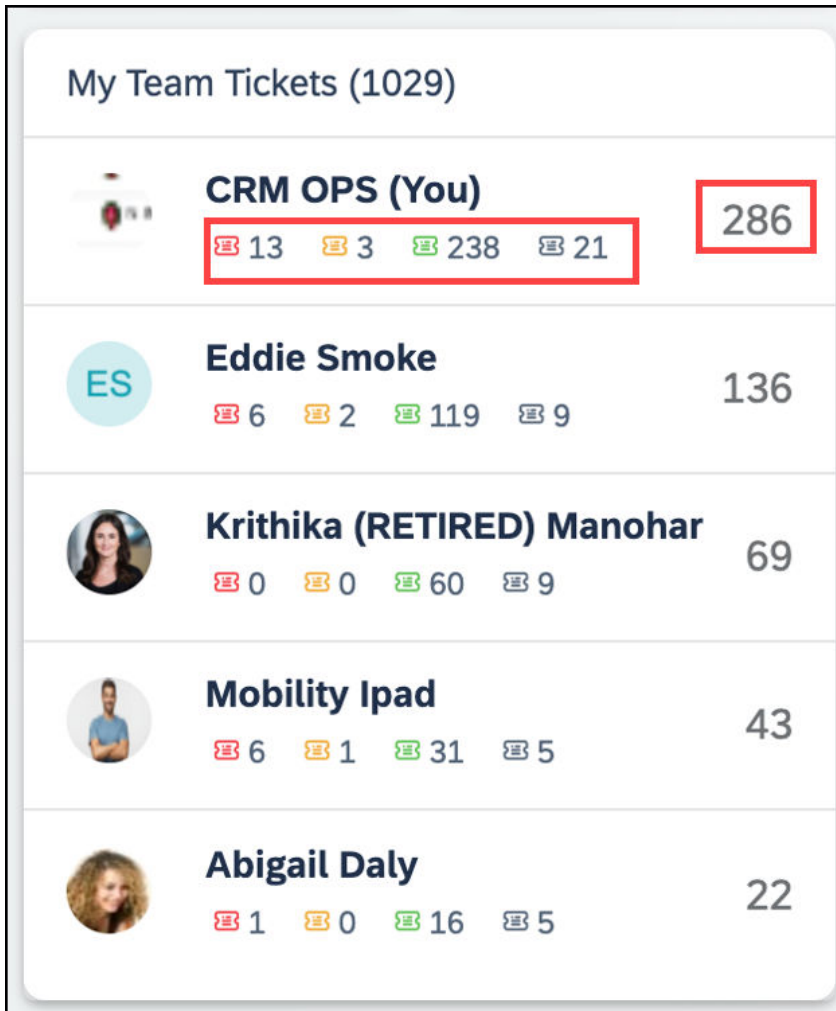
- **Quick Links card**: Quick links card launches the quick create screen for an object. In the 2008 release, the quick links card is predelivered by SAP and not configurable. Based on the number of entries visible in card, quick link card supports two card sizes.

- **My Tickets card**: My tickets card displays a summary of your tickets in kanban board layout. In the 2008 release, the kanban board layout is predelivered by SAP and not configurable. The kanban board layout on the home page is available only on the desktop. When you click *My Tickets*, you navigate to the ticket list view for the query *My Tickets*. When you click a subheading under *My Tickets*, you navigate to the list view for the subheading query. For example, if you click *Customer Action*, you navigate to the list view for the query *Customer Action*. When you click an object under the subheading, you navigate to the ticket's object detail view. You can view the *My Tickets* card in collapsed and expanded mode. By default, the ticket card opens in expanded mode, and if there's no data (the All ticket query is 0), then it opens in collapsed mode. You can see a maximum of 4 ticket statuses, and for each status, a maximum of 5 records are available that are sorted based on Last change datetime in descending order.
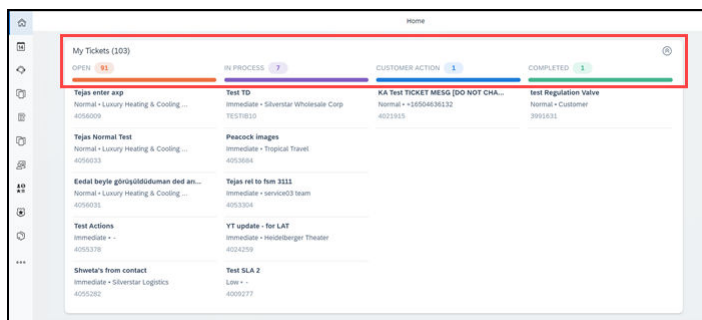
> i Note
>
> - In upcoming releases, configuration options will be available for the kanban board layout.
> - Ticket kanban board layout isn't supported in tablets and smartphones.

The administrator can add the *My Tickets* card to the home page via *Add Existing Card* option under adaptation. Currently, administrator can only control the visibility of kanban board but can't create new kanban boards or change the configuration of the predelivered kanban board.

Prerequisites to add my tickets card:

- The following fields are available in the list view:
  - Subject
  - Priority
  - Status
  - Customer
  - Changed on Field
- The user should be authorized to view *My Tickets* as the default set query.
- The list is always sorted on *Changed on* field in descending order.

- For the kanban board to function properly, and display data, all the standard fields, including status should be available in the ticket list view. Currently, there are 4 standard fields added to the ticket card:
  - Ticket subject that is a link and navigates to ticket new quick view or the ticket detail view
  - Ticket priority
  - Customer name
  - Ticket ID

Limitations

- In the 2008 release, the ticket card isn't configurable. The administrator can't add or remove any field or change the sorting order.
- Kanban board is read-only, and you can't perform actions on the ticket list in kanban board.
- Ticket card is available only on the desktop.

Related Information

Personalize Your Homepage [page 141]

2.16.2.4 Filter Card

Filter card is a place where you can keep your custom queries as a list item to be run by the user on the home page.

Filter cards provide quick access to your saved queries. You can select the filter card to go to the saved query. You see the custom queries as list items on the filter card. When you select a query, you directly navigate to the list. Thus, improving the usability and reducing the number of clicks. To see the filter card on the home page, ask your administrator to make the card visible and available for your role. Once you adapt or personalize the home page to show the filter card, the solution adds your saved queries automatically.

Related Information

Personalize Your Homepage [page 141]

2.16.2.5 Custom Cards

You can choose to create personalized cards to launch information from the home page.

You can maintain text for multiple languages in the custom cards.

> **i Note**
>
> For custom cards on the home page, English is the default language, and the English text shows up for all the different languages until changed to a specific language. For example, you only see the English text

> when you log in to German if the language isn't changed. However, the administrator can always change and maintain the German language under adaptation.

Custom cards display an icon, and can be set to launch the following:

- **URL card**: You can launch any URL directly from the URL card. The URL opens in a new tab.
- **Floor plan card**: With floor plan card option, you can create a card that launches any screen for a work center or detail view in the solution that the user wants. Custom card also includes user-defined custom screens.
- **Ticket creation card**: With the ticket creation card, you can create a new service ticket. Clicking the card launches a guided activity floor plan (GAF). Once you've created the ticket, you can view it under ▌▶ *Service* ❭ *Tickets* ❭ ▐ worklist.
- **URL mashup card**: With the URL mashup card, you can open URL mashups from the home page. While configuring the card, you can choose the mashup to configure from the mashup value help.
- **HTML mashup card**: With the HTML mashup card, you can open HTML mashups from the home page. While configuring the card, you can choose the mashup to configure from the mashup value help.
- **Video card**: Video card can be used by the administrator to configure video links for the users. When you click the video link, it launches in a separate window. As a part of the configuration, the administrator can set the title, description, and time frame for the video card. As a prerequisite, your administrator must create the video custom card via adaptation on the home page and publish to make the video card available for the users.

> **i Note**
>
> Videos aren't stored as part of SAP Sales & Service cloud.
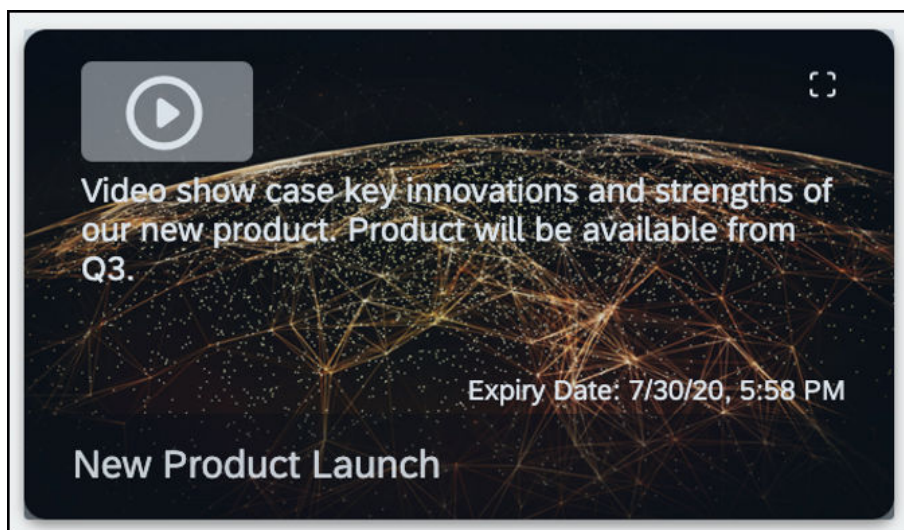
- **Message card**: The message card can be used by the administrator to publish messages for business users. As a part of the configuration, the administrator can set the message title, message description, informational icon text, and the background color of the message card. As a prerequisite, your administrator must create the message custom card via adaptation on the home page and publish to make the message card available for the users.
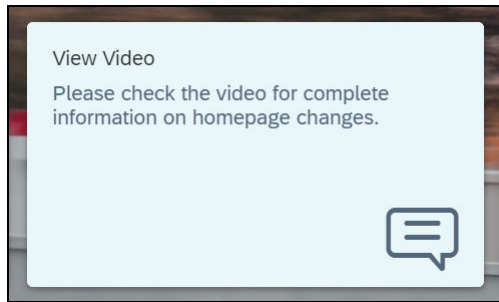
- **Quick Links card**: A quick links card serves as a launch pad tile for different source within Cloud for Customer or for external links. Quick links card on home page shows the object icons and the query names that help you to navigate. As a part of configuration, your administrator can create up to 10 links using different link types. Configure quick links card on the home page via adaptation.
- **Kanban card**: A kanban card is a visual representation of work items with the ability to navigate. You can configure kanban card on the home page via adaptation. As a part of configuration, your administrator can create a kanban card for an object for any role.

2.16.2.5.1 Create Custom Cards

Your administrator can create a custom card as follows:

1. Go to Homepage.
2. Click the pencil icon (✏️) on the right side and select *Adapt*.
3. Search and select the user role and click *Go*.
4. Click the add icon (⎙) on the right side to open the *Add Cards* window.
5. Select *Create Custom Card* to open a new popup window.
6. Choose one of the following from the *Type* dropdown.
   - URL
   - Floorplan
   - Ticket Creation
   - URL Mashup
   - HTML Mashup
   - Video
   - Message
   - Quick Links
   - Kanban
7. Add the required details and click *Save*.

Create Quick Links Card

1. Follow the steps (1 to 5) in the *Create Custom Cards* topic.
2. From the *Type* dropdown, select *Quick Links*. The corresponding fields for the *Quick Links* configuration show up with the selection.

3. Select the language from the dropdown and enter a name.
4. Go to *Link 1* and select any of the following from the *Link Type* dropdown:
   - Filter
   - Create
   - Report
   - KPI
   - External Link

   > i Note
   >
   > You can't customize a *Dashboard* link type.

5. If you choose *Filter* as *Link Type*, you must select an object first, and based on the selection you must select a query.

   > i Note
   >
   > You can't see the hidden queries from the master layout in the dropdown.

   > ! Restriction
   >
   > You can't see any queries from the page layout.

6. Choose any other *Link Type* and update the necessary fields based on your requirements.
   Similarly, you can add up to 10 links.
7. Click *Save* when you finish.

Create Kanban Card

1. Follow the steps (1 to 5) in the *Create Custom Cards* topic.
2. From the *Type* dropdown, select Kanban. The corresponding fields for Kanban card configuration show up with the selection.

3. The administrator can then select an object (like Accounts, Appointments, Tasks, Tickets, and so on) for which Kanban needs to be configured.

> i Note
>
> Objects are predefined by SAP. Objects shown in dropdown are based on the role chosen during adapt. For example, if the administrator chooses a role with authorization for only the opportunity work center view, then you see only the opportunity object to create Kanban and not the other objects.
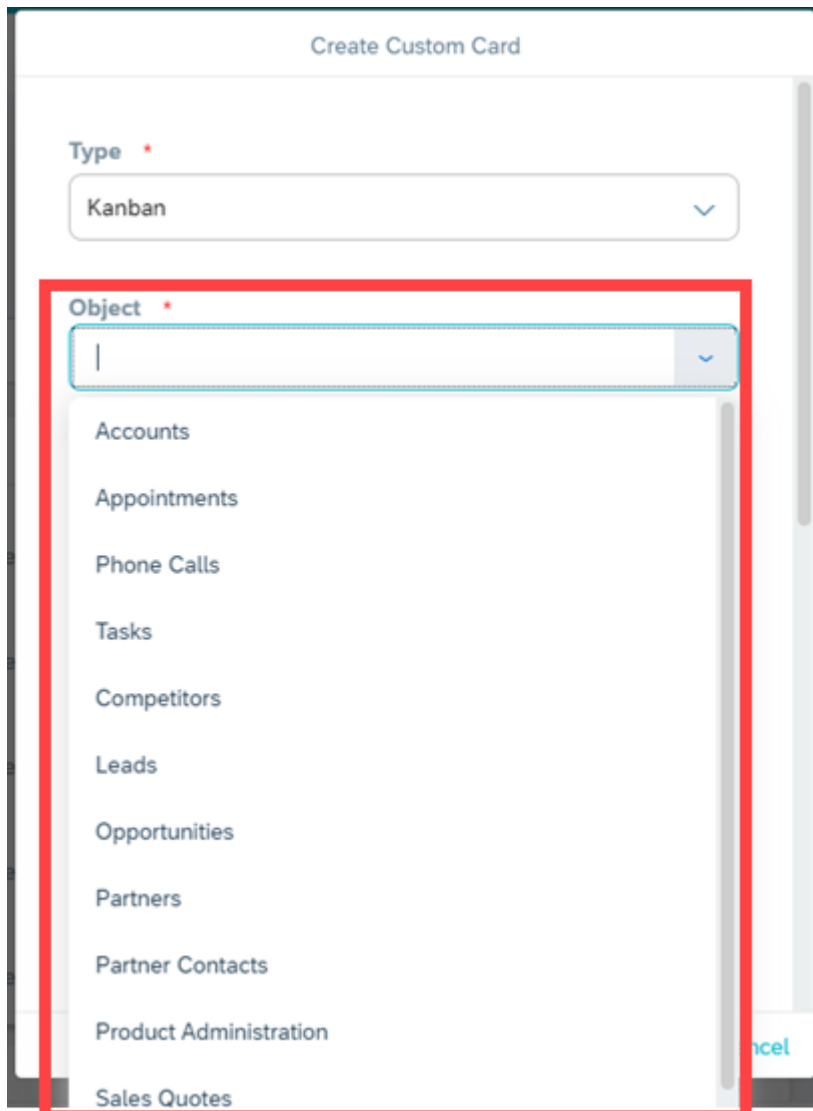
List of objects supported for Kanban card:

- Accounts
- Opportunities
- Phone call
- Tasks
- Competitors
- Competitors Products
- Leads
- Appointments
- Partners
- Partner Contacts
- Product Administration
- Product Lists
- Promotions
- Sales Quotes
- Sales Orders

- ○ Visits
- ○ Tickets
- ○ Work Tickets
- ○ Contracts
- ○ Installation Points
- ○ Individual Customers
- ○ Registered Products
- ○ Time Entries
- ○ Time Reports
4. Select the Data Set Query.

> **i Note**
>
> Data set query dropdown shows only adaptation mode queries and standard queries. The data set query doesn't check the role-based authorization of any default query set. It doesn't check if the default set query is hidden for the role. Admin selects the relevant query for the role.

5. Select Attribute. Attributes are the fields seen as columns in a data set. For example, if you have chosen My Tickets as the date set query, the fields that are available in the dataset (status, priority, and so on) are available for selection as attribute.

6. Select the visualization option. By default, detailed visualization is selected, and the Kanban card information shows in a collapsed mode on the homepage. You can expand it to see full Kanban card. Visualization card size may vary depending on values selected in Kanban configuration.

> i Note
>
> o   In vertical Kanban card visualization, the collapsed state checkbox, display fields and sort order fields are disabled. You can only select values, as vertical Kanban only shows values along with count.
> o   In detailed Kanban card, you can select a maximum of 5 values and a minimum 2 values. Add value button will be disabled after adding 5 values.
> o   In vertical Kanban card, you can select a maximum of 8 values and minimum of 2 values. Add value button will be disabled after adding 8 values.

Create Custom Card

Attribute *

Status ⌄

Visualization:
Click ⓘ for a preview. Details view displays 5 values and vertical view displays 8.

Save   Cancel
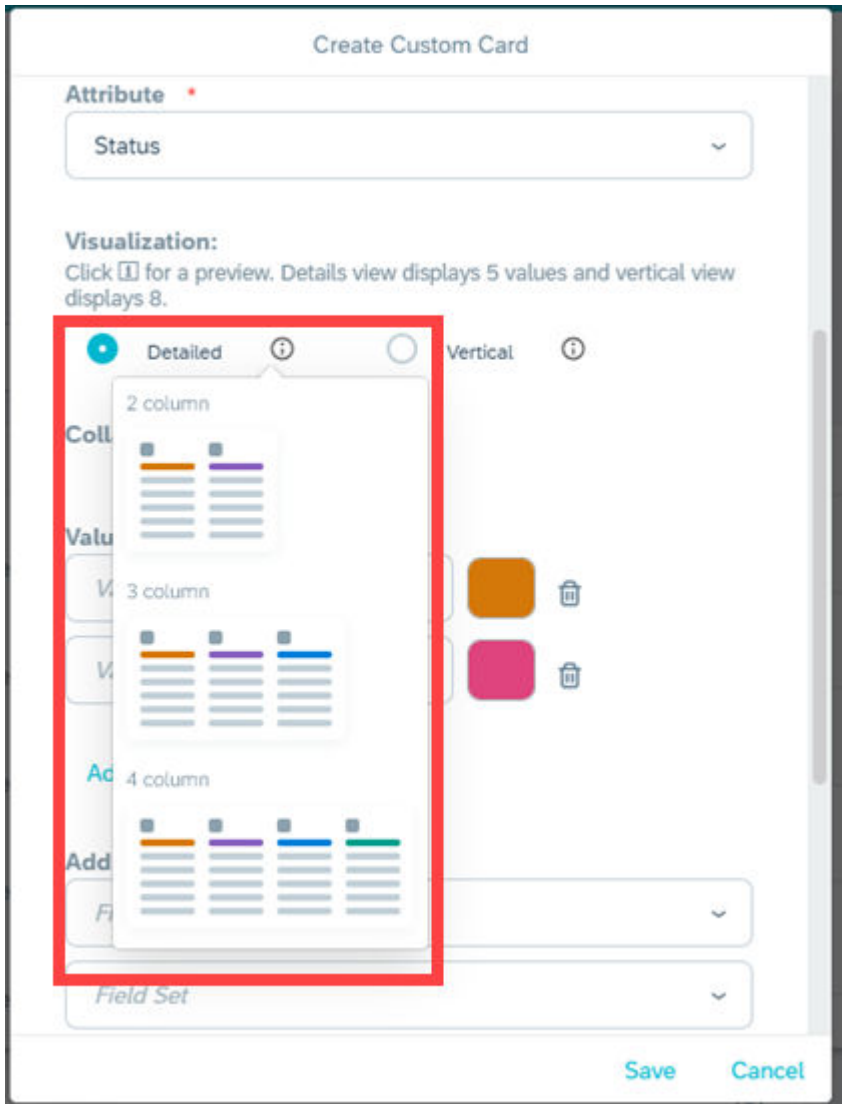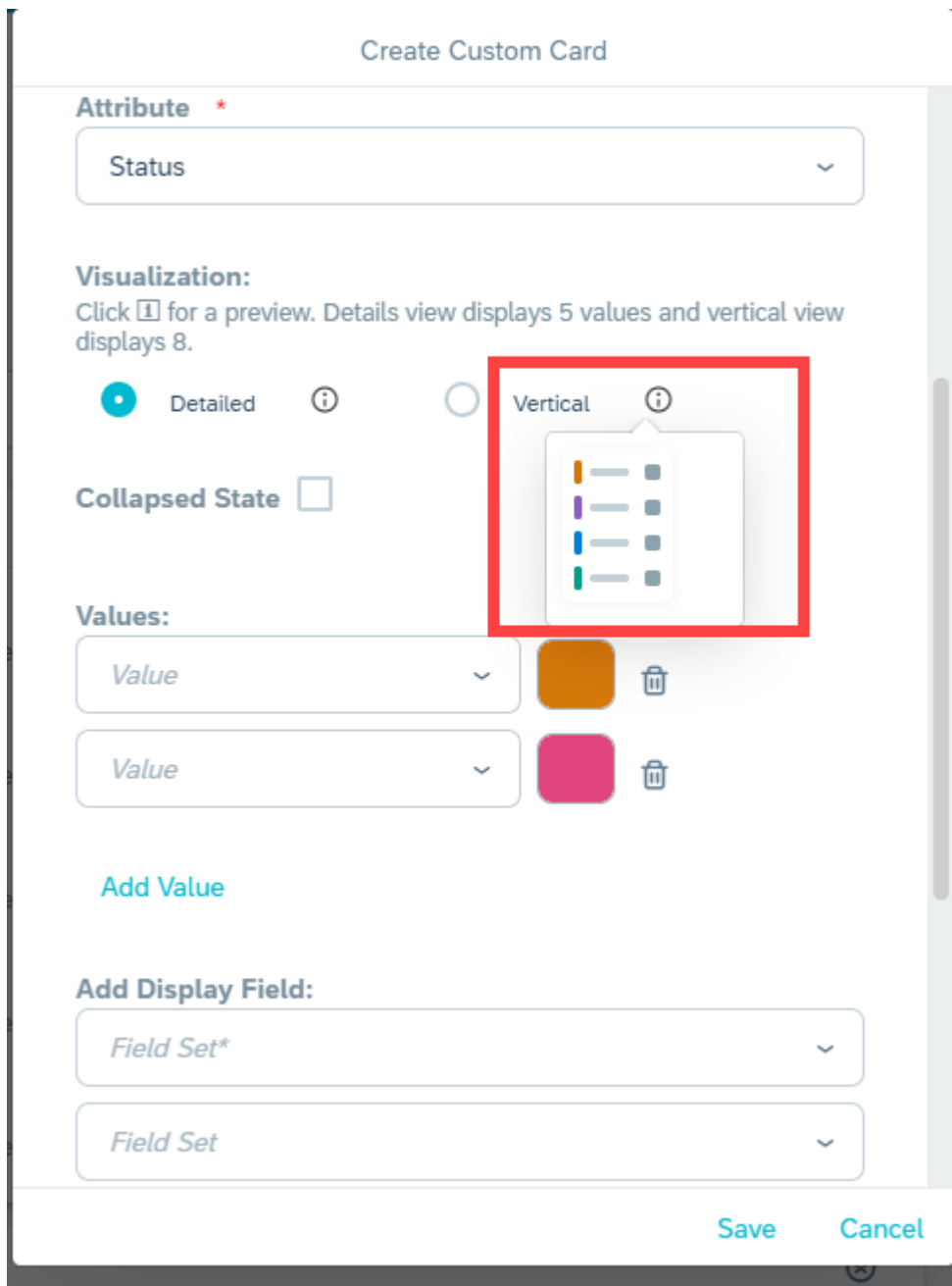
7. Select Value. Values are based on the attribute selection. For example, for the attribute **Status**, the values can be in process, open, complete and so on.
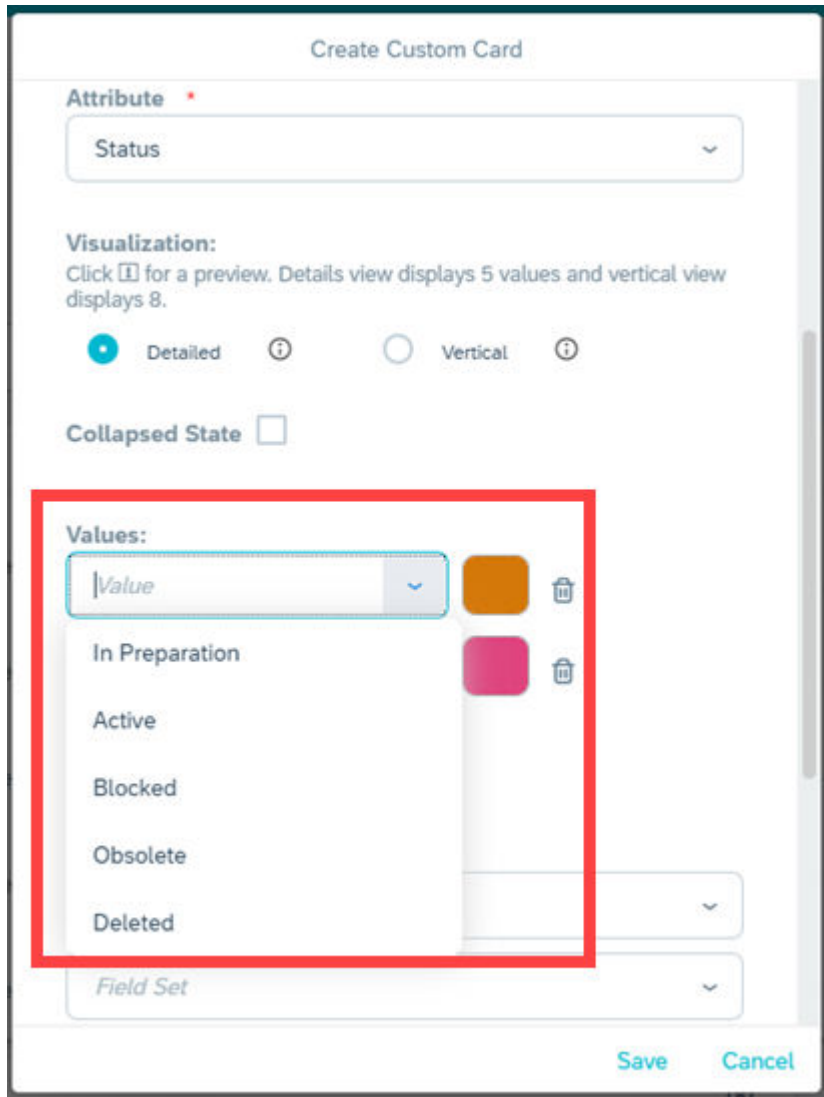
8. Add Display fields, pick the Sort order and then click *Save*.
    Display field is the other field of the data set query that you can choose to see in the Kanban card. For example, if **Status** is selected, you can view additional details of a ticket like name, ID, priority, etc. These additional details are the display fields.
    Data of display fields in Kanban card is shown based on sort order selection. You can select the sort order based on one of the display fields.

> **i Note**
>
> By default, a newly created Kanban card is not visible on the homepage. To make the Kanban card visible, go to Add Existing Card and select Custom tab in adaptation, to see all the configured Kanban cards. Change the visibility of the created Kanban to see it on the homepage. Only one Kanban card is visible on the homepage at a time for a role.

Navigation from Kanban Card:

- **Navigation from title**: By clicking the title, you navigate to the configured object's list view and the configured data set query view is displayed.
- **Navigation from value count**: By clicking the number count, you navigate to the configured object's list view and configured data set query is displayed.
- **Navigation from First Link (applicable for Detailed view)**: By clicking the first link, you navigate to the object's detail view. Navigation is only possible to the object that you have configured the Kanban card on. For example, you choose the object **Task** and configure the field Customer as the first field. Even if you click on the customer field, it opens the **Tasks** object.
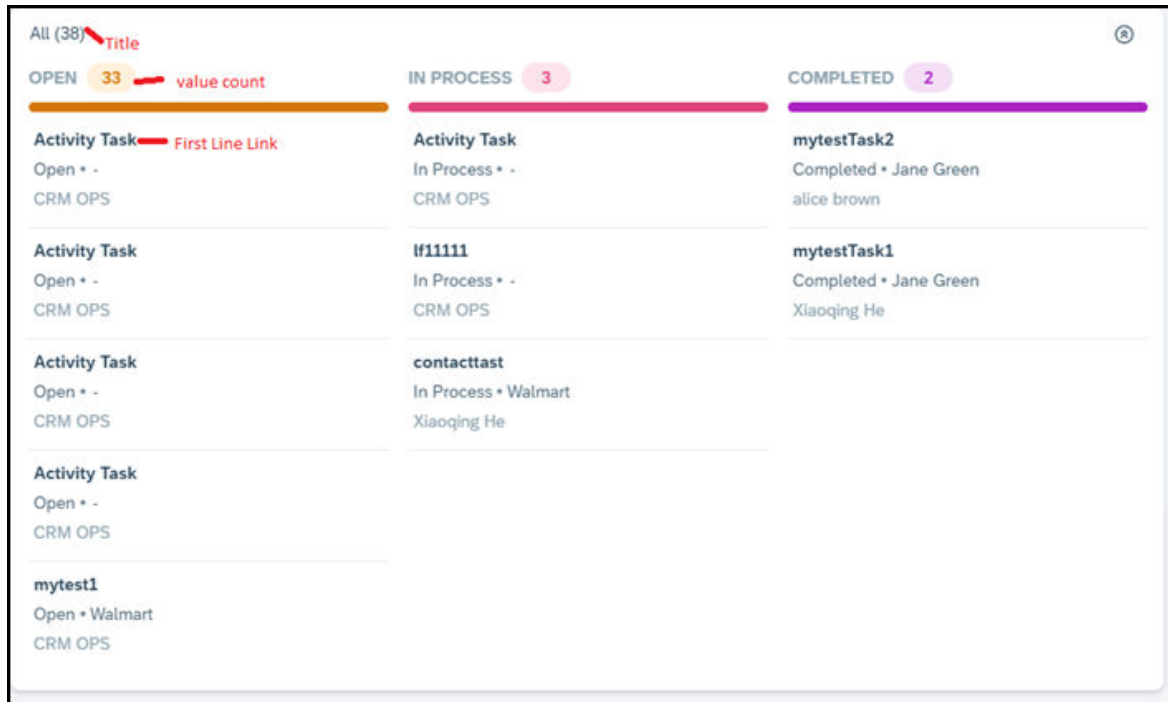
- **Navigation from vertical kanban card** - In the vertical Kanban card, both the title and number count are clickable, and you navigate to the configured object's list view and the configured data set query view is displayed.
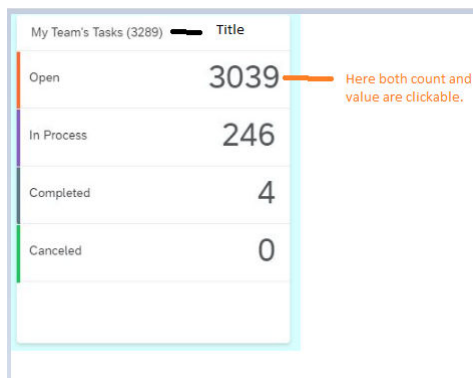
> **i Note**
>
> You can edit or delete only the custom kanban cards not the SAP-delivered kanban cards.

Limitations to Kanban Card:

- Kanban board card is not available in offline and on mobile devices.
- Only a maximum of 5 values for detailed visualization and a maximum of 8 values for vertical visualization can be added, after that the add button is disabled.
- Context based drop downs are not supported. For example, state (Dependency on Country/Region).
- When the Kanban card is set as visible on homepage, it shows as an empty card. Only after publishing, data shows on the Kanban card.
- The admininstrator can create any number to Kanban cards, but only one Kanban card visible for a role.

- In the vertical Kanban card visualization, the collapsed state checkbox, display fields and sort order fields are disabled. You can select only values, as vertical Kanban only shows values along with count.
- If you are assigned to multiple roles and for each role, the administrator had configured one visible custom Kanban card, then only the first created Kanban card is seen on the homepage. However, you can make any other Kanban card visible or invisible through personalization.
- If you are assigned to multiple roles, and for one of the roles, for example, the standard My Tickets Kanban card is visible, and for another role any custom Kanban is visible, then preference is given to standard Kanban.
- If you rearrange the existing work center views, you cannot navigate from the kanban card to the work center views.

Related Information

2.16.3 Personalize Your Homepage

Learn how you can personalize your homepage.

> i Note
>
> - Personalization capability is not available in smartphones.
> - card Navigation in offline is limited to Today's Activities, Visits, Custom report and Floorplan cards.
> - Personalization is not available in offline mode.

You can personalize your homepage screen with your preferences. To personalize your homepage, you enter the personalization mode by clicking the edit icon located inside the footer toolbar. Once you are in the personalization mode, you can hover over the content area and see that editable areas are highlighted and marked by a frame. You can select the icons which allows you to make the corresponding personalized changes.

In the personalize mode, you can make various changes to the current screen such as rearranging the cards and groups by dragging and dropping them, adding and deleting card and groups, renaming groups etc. You can make hidden items visible again by turning on the visible switch. All hidden and available items will appear in the list and you can add them again.

After completing the personalization of your homepage screen, you can exit the personalization mode by saving the changes you made. Or if you want to remove the changes, press cancel.

2.16.3.1 Disable Homepage as the Default Landing Page

If you are not actively using the homepage, you can disable it from being the default landing page.

> → Remember
>
> Home Page Settings icon (gear icon) is located on the top right when you are in personalization mode.

With this setting, the first work center view defined for the user or role in becomes the default landing page for the Fiori client.

In the personalization mode on homepage, you can uncheck the checkbox *Set Homepage as the Start Page* under settings.

2.16.3.2 Add and Edit Cards

Learn how to add and edit cards on the homepage. You can rearranging these cards by dragging and dropping them and also move them to different groups.

> i Note
>
> For an optimal performance experience, you'll get a warning message when you exceed the recommended number of KPI and Report cards on the homepage. The recommended maximum number of KPI cards supported is 10 and the maximum number of Report-based cards (Custom pattern cards like Bar Chart cards) supported is 4. You still have the option to add additional cards, but it impacts the performance. There's no limit on recommended number of List cards, Tool cards, and Custom cards.

- **Add card**
  There's a + icon to add a new card at the end of each card. To add cards, click/tap the + icon. You can also remove a card that you don't need by turning off the visible switch and making it invisible. If the card preview shows a card as visible, then card is shown on the homepage.
- **Edit Existing cards**
  Click/ Tap on a card to open the settings screen for the respective card. Turning off the *Available* switch removes the card from the homepage, and automatically turns off the *Visbile* switch. You can change the group of the card, for example, move the card to a different group and then save your changes. card visualization can also be changed.
- **Edit Custom card**
  Once a custom card is created, it's placed on the user interface as available and visible. To edit custom cards, click the card and open the edit dialog as you would usually edit other cards. The dialog includes details such as *Title*, *Path*, and *Description* that are editable. However, the type of the card (URL vs. Floorplan can't be changed).

2.16.3.3 Launch Mashups from Home Page cards

Launch a URL or HTML mashup from a home page card.

On the homepage, you can view the content of the mashup card. You can also click to launch the same mashup shown in the card or you can launch a different mashup that shows more details of the HTML mashup card.

Note that mashups which do not have a port binding are also allowed in the home page card mashups

2.16.3.4 Add and Delete Group

Based on your requirement and preference, you have the option to cluster the cards into a logical group.

- **Add Group**
  You have the option to cluster cards by creating new groups. There is a + icon to add at the end of each group. To add new groups, click/tap the + icon. You can also rename the supported groups.
- **Delete Group**
  You can also delete groups created by you besides rearranging groups by dragging and dropping them. A group created by you shows a *Delete* button. Delete will simply remove the group permanently so that it will not be visible on the user interface any longer. You will get a warning message before removing the group.

2.16.3.5 Define Homepage Settings

The administrator can access homepage setting as a gear icon on the homepage.

As an administrator, under homepage settings you can enable the users or roles to group cards on their homepage. To do so, check the checkbox *Show cards in Groups* under settings. You can also change the homepage to show as the default start page when the user logs in. To do so, you can uncheck the checkbox *Set Homepage as the Start Page* under settings.

2.17 User Profile Menu

The user profile menu provides the user with access to the user profile, settings, help, and additional settings for account features.

The menu options are found in a dropdown list. You can navigate to your profile, access different settings, and log out. The menu options are contextual to the browser or app. The menu options change depending on the browser or the installed app. For example, sync options and settings are only available via the installed extended app.

> **i Note**
>
> The administrator can hide certain menu options for the users or roles depending on their preference.

Administrator	Business user
Dropdown options	**Dropdown options**
• Settings	• Settings
• SAP Support Assistant	• SAP Support Assistant
• Report Incident	• Report Incident
• Track My Incidents	• Track My Incidents
• Switch Display Mode	• Switch Display Mode
• Download	• Download
• Annotate	• Annotate
• Start Personalization	• Start Personalization
• Start Adaptation	• Share Your Ideas
• Share Your Ideas	• About
• About	

Share Your Ideas: It is a single central place for all product improvement request related activities. You can browse improvement requests, submit improvement requests, comment, vote, receive updates, and browse who has voted.

Settings: Selecting *Settings* from your user menu dropdown takes you to the settings page. You have a wide range of customization of themes and C4C platform-specific settings to align with your preferences. You can save or cancel the changes you make.

Various different settings available are all available on one screen on the Fiori client UI:

- *My Settings*: You can maintain your personal preference settings in Fiori Client.
- *My Background Image*: You can maintain your personal preference for homepage background image in Fiori Client. The image size should be less than 3 MB. You can change the background image in desktop, tablets, and smartphone apps.

> **i Note**
>
> Homepage background image size is now limited to 3 MB. If you have an existing background image larger than 3 MB, it is not affected until you replace it with another image larger than 3 MB.

- *My Email Settings*: You can specify e-mail signatures you want to use for new messages, replies, and forwards. You can also quickly change the e-mail signature you want to use before sending out emails.
- *Company Settings*: You can define settings for company or for a business role.
- *Personalization Settings*: As administrator, you can define the Fiori personalization settings for business users.
- *Adaptation Settings*: As administrator, you can define the Fiori client adaptation settings.
- *Branding* includes all company level branding related setting.
  - Theme Builder: The selected theme applies across all devices for all users to best suit your brand image.
  - Background Image: Customize the background image to match your brand. Ensure that the image size is less than 1 MB.
  - Logo: You have three different branding logos for the solution depending on the type of customer license you purchase.
    - SAP Sales Cloud branding logo is for customers with SAP Sales cloud solution.

- SAP Service Cloud branding logo is for customers with SAP Service cloud solution.
- SAP branding logo is for customers with both SAP sales and Service cloud solution.

> **i Note**
>
> - Offline Settings is not part of the settings.
> - Settings options are divided into groups or categories. My Settings are available for all users, whereas Company Settings and Branding sections are visible and available only to the administrators.

Download: Includes links to download the different add-ins (Microsoft Outlook®, Microsoft Excel®, IBM Lotus Notes®, Adobe® LiveCycle® Designer), Adobe® LiveCycle® Designer, CTI Client Adapter and mobile apps for iOS, Android and Windows.

Annotate: Provides tools enabled for free-hand, arrow, rectangle, and call-out texts that you can use on the UI to share and collaborate. You can save the image on the browser or e-mail it in the extended apps.

Track my Incidents: You can check the status of the incidents created by you.

SAP Support Assistant: The optimized support assistant uses tree structures, through a series of questions, helps you narrow down to the problem, and recommends targeted solutions in real time.

Report Incident : When you are facing an issue on your SAP Cloud System, use this dropdown menu to report the issue and get support.

Switch Display Mode: Cozy and compact display modes are available for all types of devices including desktops, tablets, and smartphones. Compact mode provides denser content so that you can see more information on the screen. Cozy mode provides easy touch interaction on touch devices. Both modes optimize white space, therefore presenting more information on the screen. You can switch between these modes based on your individual preference. Cozy and compact modes offer better screen utilization and flexibility to switch between the modes.

Default display mode for desktops is compact mode. Default display mode for tablets and smartphones is cozy mode. You can switch the mode to what suites you from the user menu under *Settings*.

> **i Note**
>
> - Your selection applies for your specific device only.
> - Administrator cannot change the default mode for users.

Start Personalization: You can personalize your screen in the Fiori Client UI under the user menu by selecting *Start Personalization* from the user dropdown menu.

The following table gives a list of all the UI elements that you can personalize:

Action	UI Elements
Show and Hide	- Fields in Header, Lists, and Advanced Search - Sections - Panes - Tabs - Buttons and Menu Items

Action	UI Elements
Rearrange	• Fields in Header, Lists, and Advanced Search • Sections • Panes • Tabs • Menu Items
Sort and Group	Columns

> **i Note**
>
> You cannot personalize value help and pop-up windows.

In the personalization mode, you can do the following:

- To select an area on the screen, right click (for Windows) or tap with two fingers (for Mac). The selected area is indicated by and a yellow border.

- To edit directly an area, use

- To hide or show fields, use .

- To navigate to the parent section, use .

- To navigate to the child section, use .

- To change the sequence of fields, drag and drop them on the right pane using .

For the changes to take effect, click your profile, and select *End Personalization*. To discard the changes, select *Discard Personalization Changes*.

About: You can see the product information page in Fiori Client. It provides you information about the product name and product version.

2.18 Document Flow

The document flow tracks an object from where it originates to a quote and order. It gives you a pictorial view of the journey.

For example, an object traveling from a campaign, lead, opportunity, sales activities to a quote and order.

Document flow provides:

- **ID**- An ID is used to identify the object.
- Name of object- Each object has its own name.
- Status- This indicates the status of that object. For example, this could indicate whether a lead has been converted or whether a sales quote has been created.
- Date created- Indicates the date when the object was created.

- Time- Indicates the time when the object was created.
- Type of object- This could be a campaign, lead, opportunity, quote, or order.
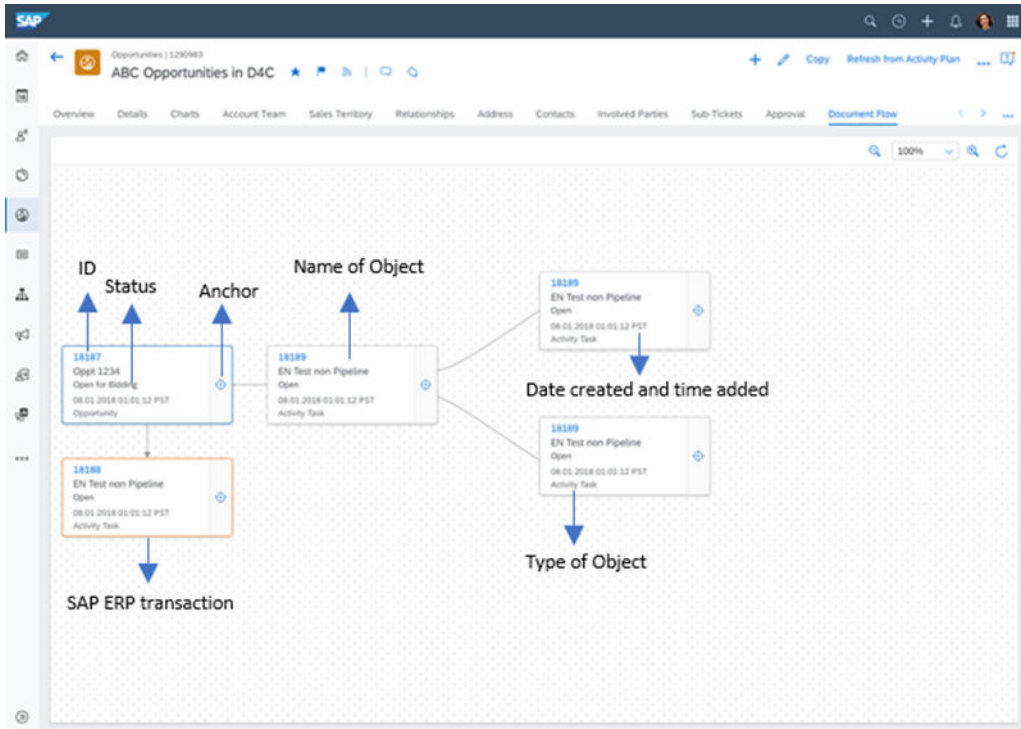
Each flow has an anchor icon. Clicking/tapping the anchor generates the flow for that selected node. When you tap on the anchor, the document flow loads so that you can see the predecessor's predecessor and also the successor's successor, when the document flow has a large number of interactions. The flow doesn't display the predecessor's successor and the successor's predecessor. Predecessor is an object that led to the creation of another object. Successor is an object that is the outcome of another object. You can zoom in or zoom out to see the details.

If you click on the SAP Cloud for Customer document in the document flow, it opens the details screen or the new quick view, if enabled.

In the Document Flow, you can also view follow-up transactions in SAP ERP. For example, follow up orders, delivery or invoice transactions, including access to the related PDF documents (using the web service). The Document Flow also displays SAP ERP references for sale and quotes and sales orders in SAP Cloud for Customer. Click the triangle in the yellow frame to open and close related SAP ERP transactions.

2.19 Keyboard Shortcuts

View the list of all keyboard shortcuts in the solution to complete some tasks quickly.

Keyboard shortcut to Edit Plain Text Notes in Full Screen on Desktop

You can use the keyboard shortcut - Control+Shift+Z, to edit plain text notes in full-screen mode on desktops. Full screen offers more useable space to see and edit the note, without having to scroll within a small box.

Keyboard Shortcut to Edit Rich Text Fields (RTE) in Full Screen on Desktop

You can use the keyboard shortcut - Control+Shift+Z, to edit rich text fields in full-screen mode on desktops. Full screen offers more useable space to see and edit the note, without having to scroll within a small box.

2.20 Workflows

Learn how you can use workflows to support your business processes.

Automate your business processes using workflows. Configure to send notifications, trigger automatic e-mails and define conditions to update fields or calculated values. Also trigger actions or schedule workflows based on dates, time or other complex conditions. Workflows also allow you to create multi-step approvals.
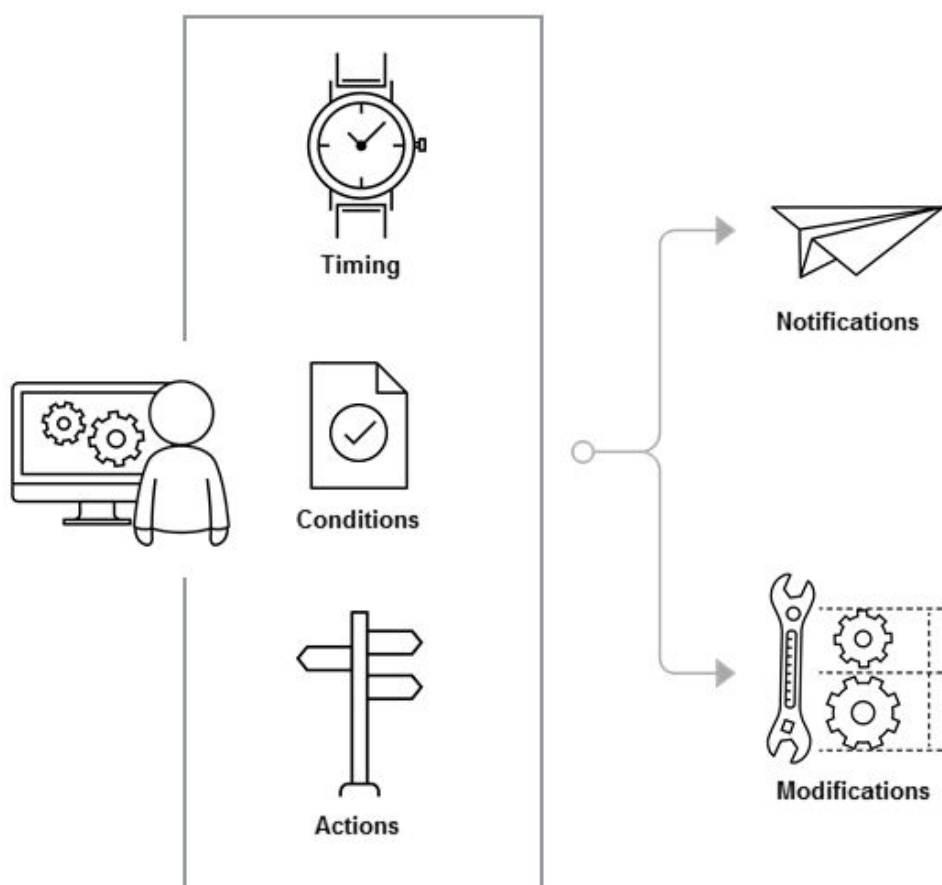
The framework is driven by the workflow rules that have four main components namely the *Object*, *Timing*, *Conditions* and *Actions*. These components determine how the workflows will be used in the various business processes.

Object

The first step to creating a workflow rule is selecting the business object for which the rule applies.

Timing

The timing determines when the system should evaluate the rule. The three available options are *On Create Only* (when the object is created), *On Every Save* (every time an object is saved) and *Scheduled* (scheduled after an event occurs). You can specify, for example, if a workflow rule be triggered when an object like a sales quote or ticket is created or when saved. There is also an option to schedule the rule for a specific time, for example two days before the due date of an item.

Conditions

Conditions are the criteria which trigger workflow rules. These conditions may be standard fields, extension fields, field value change and so on. For example, if you create a sales quote above a certain value (the condition), the system triggers the associated action. You must maintain conditions in **Groups**. Maintain multiple conditions within a group if you need more than one criteria to be met for the workflow rule. Use separate groups to define **OR** conditions.

Actions

Actions define tasks that must be executed when a workflow rule is triggered. For example, send an e-mail, generate a notification, send a text message or update a field of the object (both standard and extension fields as well as trigger an action). You can define actions using one of the supported rule-types namely the *E-mail*, *Messaging* and *Notifications*. For detailed information, see the references below.

2.21 Approvals

Learn how approvals work in the solution.
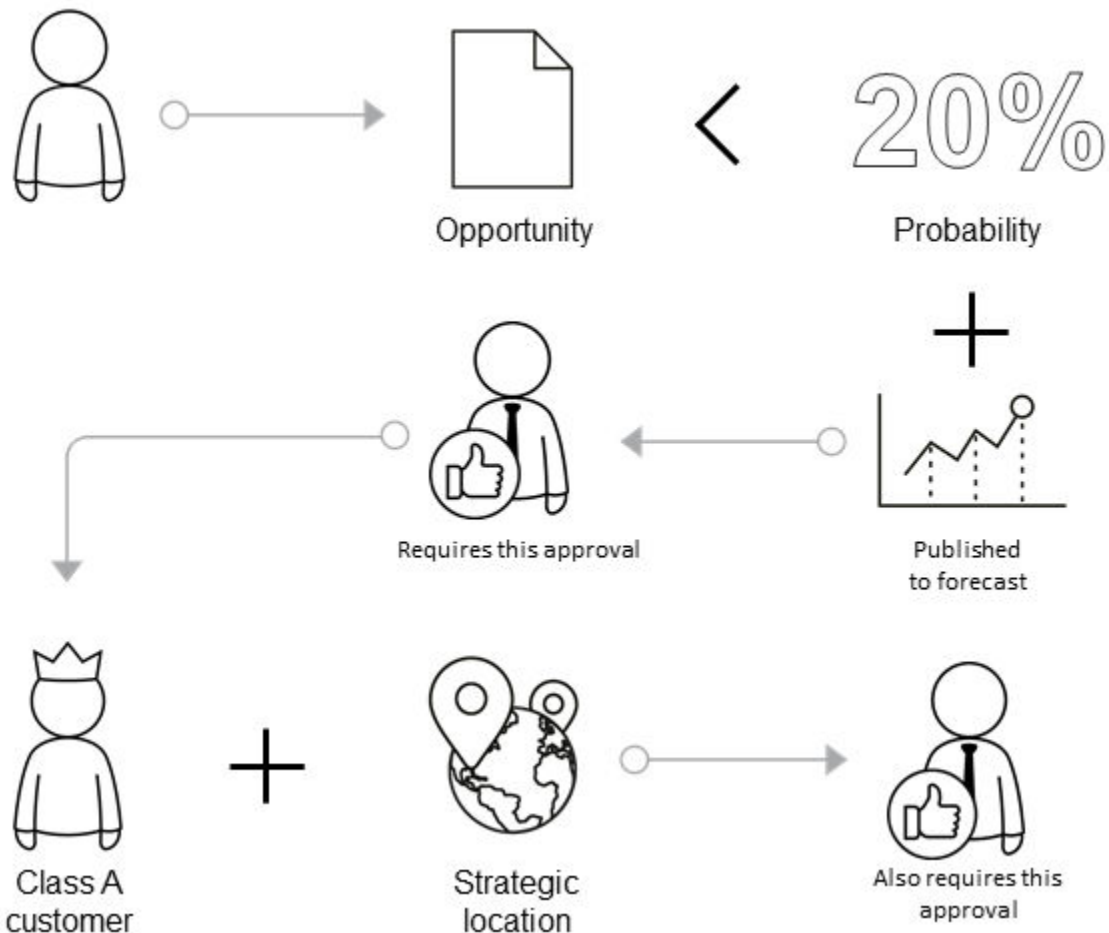
Approval workflows are configured by your solution administrator and help streamline your business processes. Approvals are typically routed to your reporting line manager, though there may be multiple levels of approval required for certain objects or conditions. Your administrator can also incorporate conditions into the approval process itself such as limits to the amount an approver is allowed to approve. And finally, your administrator can configure your solution to include e-mail approval notifications in addition to the default notifications found in the toolbar.

Few important facts about approvals:

- One business transaction can have one active approval process.
- Within an approval process, you can define several approval steps with different approvers and conditions.
- For multiple approval steps, the system checks each step in succession for the defined conditions. If approval for one step is not granted, then the system will not proceed to the next approval step.
- The approval notifications, such as the request and the confirmation, appear in the notification area of the system for the involved employees and managers.

- If the approver finds an unsatisfactory transaction, then the approver can add a comment and return it to the employee for revision. The employee then revises the transaction and submits it again for approval. Once the business transaction is correct, it can be further processed.
- The approval process can be enhanced with e-mail notifications that are sent directly to the applicable employees, as described in the prerequisites below.

Example: Campaign Approvals

> ⚙ Example
>
> For example, you have activated the approvals for campaigns in your system, and now you want to define a two-step approval process. In the first step, campaigns created for the campaign execution type *Direct E-Mail* are to be approved by one of two employees in your company. In the second step, campaigns with target groups greater than 10,000 members are to be approved by the line manager of the employee.
>
> Now suppose that the employee created a campaign with execution type *Direct E-Mail*, with a target group that contains 10,523 members, but neglected to specify the start and end date of the campaign.
>
> In response, the system first confirms that this campaign requires approval, so the employee is only authorized to select ▌ *Actions* ❯ *Submit for Approval* ▐. Then, one of the approvers checks the campaign and notices that the campaign start and end dates are missing, so the approver adds a comment to the campaign, and returns it to the employee for revision. The employee corrects the campaign accordingly and submits it again for approval.
>
> The campaign is then initially approved, but the employee must wait until the line manager also provides approval, because the target group has more than 10,000 members. The system determines the line manager from the organizational management hierarchy, upward from the employee, until the first manager is found.

Example: Multi-Step Approval for Opportunity

Let's say your system has been set up with a rule that requires your manager's approval for any opportunity that has a less than a 20% probability of closing but that has already been published to the forecast. In addition, there's another rule that requires the top-level account owner's approval for any opportunity at an "A" category customer within a specific region. When you create an opportunity that fits both of these conditions, you are prompted to submit it for approval. The system then notifies your manager who can either approve the opportunity or send it back to you for revision. Once your manager approves it, the system will send a notification to the top-level account owner who also needs to approve the opportunity before it can move to the next stage in your business process.

2.22 Customer Onboarding

We're introducing an easy, step-by-step simulation flow to improve the new user's experience and ensure their success with the solution.

Why do customers move away from a product? One, they feel that they don't understand the product, and second that they aren't getting any value from it. Both these problems can be addressed by creating a seamless user experience from the first interaction to the final purchase decision.

The simulation flow provides a consistent product experience for each new customer and gets them acquainted with our solution. The new user gets step-by-step guidance as they navigate through the solution.

What's unique about the simulation flow?

- All the complexities of the solution have been hidden behind a clean and simple user interface for the new users to try out the different features.
- We have added personas for the new users to interact and experience the product as a real user. New users can use personas to learn best practices and understand the use cases crafted by SAP Experts. Using personas, the new users can also learn about the latest interactions offered on the UI, extensibility & different features offered.
- Simulation flow provides the hand-holding that a new user needs as they get started. It ensures that they understand the product and how it provides value.
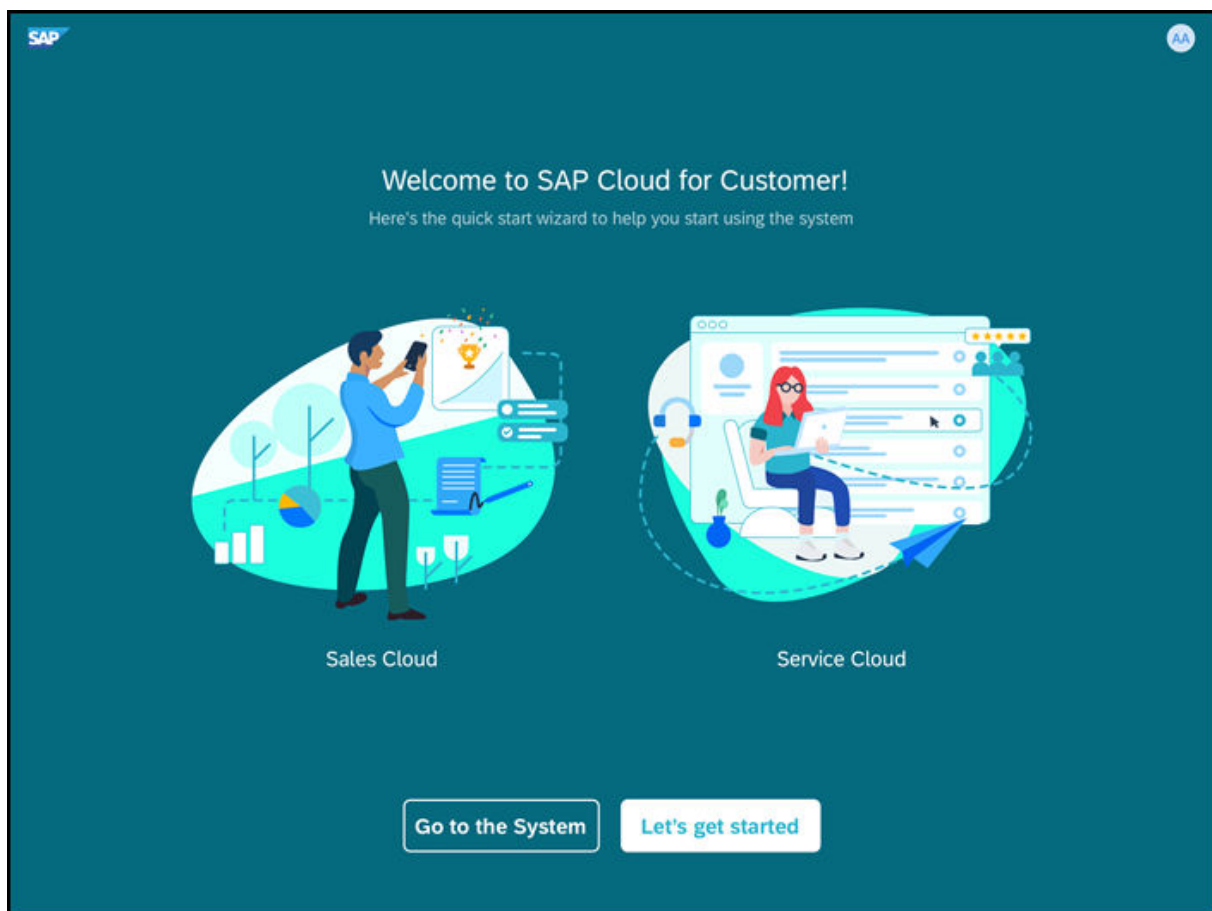
Onboarding experience for each new customer

When the new user logs in for the first time, they're directed to a simulation flow on the UI that provides step-by-step guidance for basic configuration and helps to set up the system and try out the different features in the solution.

You can set the company preferences, add data, select your theme and brand, simulate business roles and assign business roles. You can only use your own personal data (for a more meaningful, contextual experience) to try out the different functionality. As part of simulation experience, you can also simulate different business roles. For example, a sales representative or a service agent business role. When you come to the home page by clicking **Go to System** from the screen, you can access the persona card on the home page. When you select a persona card, the system showcases SAP delivered definition for selected persona.

> → Remember
>
> Once you click, **Go to System** you can't go back to simulation.
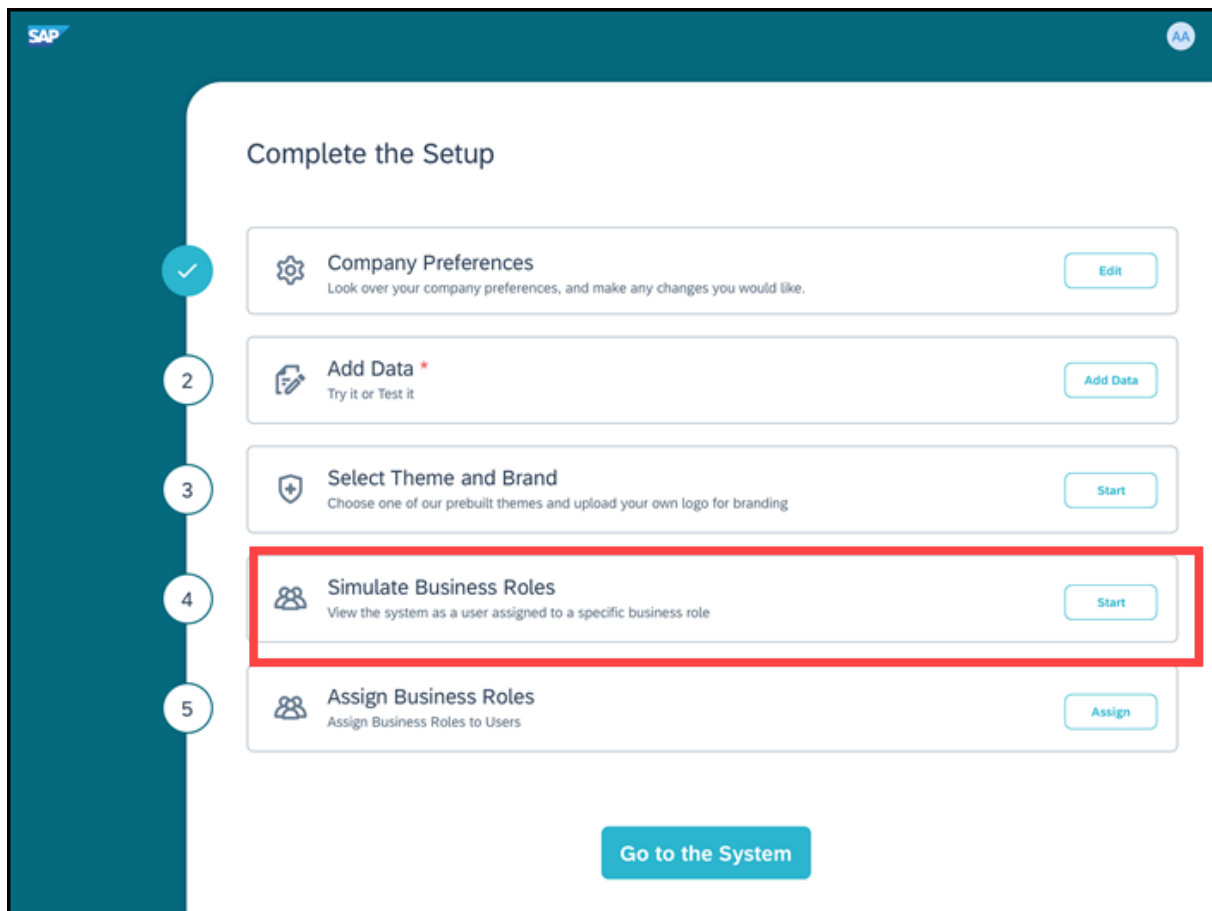
Any new tenant that is provisioned by SAP, either test or production tenant comes with the simulation flow. You can choose the step-by-step flow to familiarize yourself with the system or exit and directly go to the system.

> **i** Note
>
> - Once you click **Go to the System**, the simulation flow ends and you can no longer access it.
> - Simulation provides sequential steps. But you can also choose to go any step you want.

Steps in the simulation flow:

1. On the first screen, click **Let's get started**. You're directed to **Complete the Setup** screen.
2. **Under Company Preferences**, you can review your company preference. All entries (company, country/region, currency, and time zone) are prefilled based on the initial data provided by the new customer while requesting for a tenant.
3. Under **Add Data**, you can add users, accounts, contacts, and products by downloading the template, filling in user data and uploading. Once you have added the data, you see the information displayed under **Add Data**.
4. Under **Select Theme and Brand**, all the themes available for the tenant are visible. You can also add your own custom logo. By default, SAP logo is provided, but you can change and upload your own logo.
5. Under **Simulate Business Roles**, all the roles available for the tenant are visible. You can click on each role to see the respective simulation for the role.
6. Under **Assign Business Roles**, you can assign roles to the users you've added in the system. Each user can have multiple roles.

> i Note
>
> You can access help from the user drop down and log out. When you log out, you can log back in into the simulation flow.

3 Accounts and Individual Customers

Account management capabilities offer a holistic view of the customer, and allow you to capture, monitor, store and track all critical business information about customers, prospects and partners.

Use this information to focus on your most profitable customers, maintain satisfaction and loyalty and consistent interaction across all channels.

> i Note
>
> All accounts, individual customers, employees, contacts, partners and competitors are considered as business partners in the system. Therefore all functions that are common to business partners are applicable to them.

> i Note
>
> In SAP Cloud for Customer , the *Customers* refers to corporate accounts, individual customer accounts and contacts. *Accounts* represent organizations with which business is done and *Individual Customers* represent persons with whom business is done. Create business accounts to represent your customers in your system. This chapter explains the features around the corporate accounts and individual customer accounts. Most features are common to both accounts and individual customers. However you can maintain contacts only for corporate accounts and not for individual customers. For information on contacts, see **Contacts Management**

MASTER DATA		TOOLS	
Account 360 Overview	Account Hierarchy	Migration Service	Groupware Integration
Relationships	Territory Management	Customer Insight	Account Merge
Social Profiles	Account Team	On-Premise Factsheet	Maps
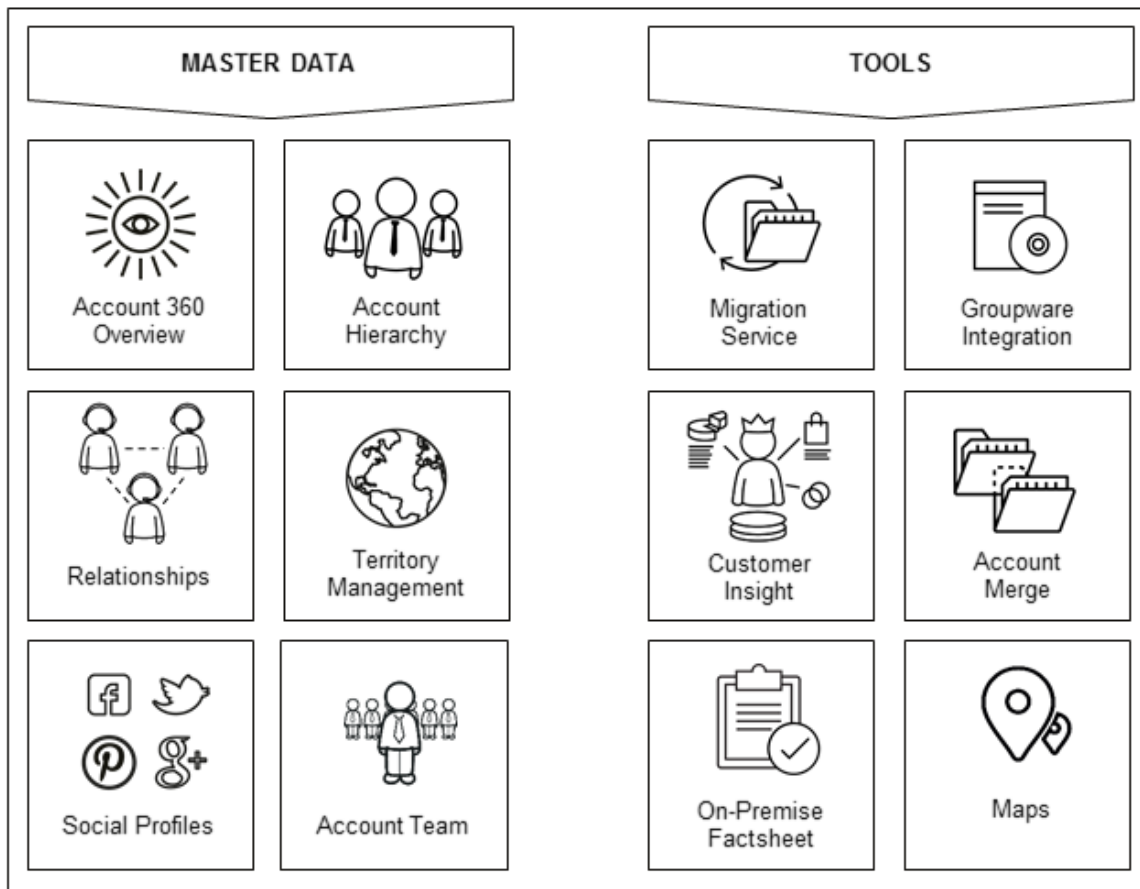
3.1   Scope and Configure Accounts

Scoping and configuration for accounts.

Accounts management is comprehensive with a host of features and configuration possibilities. For most of these functional features, you as an administrator, will need to maintain the required configuration. The topics below describe the configuration in detail.

3.1.1 Enable Accounts

Administrators can enable and scope accounts in the business configuration.

To scope and enable accounts, go to ▌▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▌▶ *Edit Project Scope* ❭ *Questions* ❭ *Sales* ❭ *Account and Activity Management* ❭ *Account Management* ❭.

3.1.2 Configure Default Customer Roles

Administrators can define customer roles.

To maintain the required configuration, go to ▶ *Business Configuration* ❯ *Implementation Projects* ❱. Select your project and navigate to ▶ *Open Activity List* ❯ *Accounts* ❯ *Maintain Customer Roles* ❱.

3.1.3 Configure Basic Business Partner Details

Administrators can maintain the basic business partner attributes such as titles, relationships, name and so on.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❱. Select your project and navigate to ▶ *Open Activity List* ❯ *General Business Partners* ❯ *Accounts* ❱ to maintain the following configuration. Basic descriptions for these configurations can be found in the system.

- **General Business Partner**
  - Name Formats
  - Number Ranges for Business Partners
  - Industries
  - Legal Forms
  - Marital Status
  - Professions
  - Academic Titles
  - Titles
  - Relationships
  - Tax Number Types

3.1.4 Configure Basic Account Features

Administrators can maintain the basic business configuration for accounts such as roles, classifications, payment terms and so on.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❱. Select your project and navigate to ▶ *Open Activity List* ❯ *Accounts* ❱ to maintain the following configuration. Basic descriptions for this configuration can be found in the system.

- Account ABC Classification
- Payment Terms
- Customer Groups
- Nielson IDs
- Customer Roles
- Delivery Block Reasons
- Billing Block Reasons

- Order Block Reasons
- Sales Document Order Block Assignment

3.1.5 Configure Account Maintenance

Configure parameters for account maintenance.

Go to ▌▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▌▶ *Edit Project Scope* ❭ *Questions* ❭ *General Business Data* ❭ *Handling of Business Partners,* ❭ scope the following questions:

- Do you want to sync accounts and contacts in your solution with Microsoft Outlook?
- Do you want to sync accounts and contacts in Microsoft Outlook with your solution?
- Do you want to see the calculated fields like active pipeline and year to date revenue in the header of the account detail?
- Do you want to see the calculated fields like active pipeline and year to date revenue in the account hierarchy facade of the account detail?

3.1.6 Configure International Address Versioning

Administrators can configure International Address Versioning for language maintenance.

Go to ▌▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▌▶ *Open Activity List* ❭ *Fine-Tune* ❭ *International Address Versions* ❭ and select all the languages in the list for which you need to maintain address data. The activated scripts (for languages corresponding to the address versions) can be used to maintain master data such as business partner name and address.

> **i** Note
>
> You must also specify a default address version that will initially be displayed and that must be maintained for every record. After the creation of name or address data for a non-default address version you cannot change the default address version again.

Additionally, you can configure the feature under ▌▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▌▶ *Edit Project Scope* ❭ *Questions* ❭ *Built-in Services and Support* ❭ *Business Environment* ❭ *Addresses and Languages* ❭ *International Address Versions* ❭ and select the scoping question: **Do you want to specify textual master data using international address versions?**

3.1.7 Enable Address Check

Administrators can configure address check that validates addresses maintained in master data for business partners and organizational units, during migration and data replication.

To enable address check, go to ▌▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▌▶ *Open Activity List* ❭ *Address Checks* ❭. The system checks if address data, such as country/

region, and postal code length, is consistent. Inconsistent data leads to error messages and cannot be saved or activated.

To disable the address check, select the *Allow Saving of Inconsistent Addresses* checkbox. If you select the checkbox below, you allow the saving of inconsistent addresses for master data. The check results will then be shown as warnings, and the data will be saved.

> **i Note**
>
> Checks of address data for business documents are not affected.

3.1.7.1 Turn Off Country/Region Specific Formatting for Phone Numbers

Administrators can turn off the country/region specific formatting for phone numbers to avoid issues during replication of business partner addresses.

To maintain the required configuration, go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Built in Services and Support* ❯ *Business Environment* ❯ *Address and Languages* ❯ and select the scoping question: *Do you want to suppress the defaulting of the country dialing code for phone numbers without country dialing code?*

Country/region specific formatting ensures that if the recommended format for a phone (or mobile) number isn't maintained and the dialing code isn't available, then system determines the dialing code from the postal address. However, during migration or replication, if inbound phone numbers do have the dialing code but are prefixed '00' instead of the superior leading '+', this may result in problems with migration. Use the scoping question to suppress country/region formatting for such business needs.

> **i Note**
>
> The recommended format to maintain a phone or mobile number is to start with a leading '+' followed by the dialing code, for example, '+49 (6227) 7-47474'.

3.1.7.2 Maintain Custom Name Prefixes For Country/Region Specific Requirements

Administrators can define custom prefixes for business partner names under ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Open Activity List* ❯ *General Business Partners* ❯ *Maintain Name Prefixes* ❯.

This configuration allows you to maintain name prefixes that is specific to country/region. Before configuring the prefixes, map them to corresponding values in external systems such as SAP S/4HANA in order to ensure seamless replication of business partner data.

3.1.8 Configure Maps

Administrators can configure Google Maps or AutoNavi Maps for different accounts.

To enable map view, you must configure mashup. Proceed as follows:

1. Choose ▶ *Administrator* ❯ *Mashup Authoring* ❯ *.* ❙
2. On the *Mashup Authoring* screen, select *Custom Mashups* from the dropdown menu.
3. Perform a search for the mashup ID. The mashup IDs for the available maps are as follows:
    ○ Google - `SM00078`
    ○ AutoNavi - `SM00079`: For use in the countries/regions such as China where Google Maps aren't supported.
4. Select the mashup and click *Enter API Keys*. The *Enter API Keys* dialog box opens.
5. Click *Show API Key* and, in the *API Key Value* column, enter the API key that you received from the service provider.
6. Save your changes.

> **i Note**
>
> * The use of the Google Maps Service is subject to Google Terms of Service, which are written in http://www.google.com/intl/en/policies/terms/ ➚ . If you don't accept such Terms of Service, including but not limited to all limitations and restrictions therein, you may not be able to use Google Maps Service in SAP Cloud for Customer. The use of Google Maps Service in or through SAP Cloud for Customer constitutes your acceptance of Google Terms of Service, and it can be terminated by SAP without reason at any time and SAP is not required to provide an equivalent service via another provider.
> As a prerequisite, please create a support ticket to obtain and use the SAP API key for Google Maps.
> * The use of AutoNavi Maps Service is subject to AutoNavi Terms of Service, which are written in http://map.amap.com/doc/serviceitem.html ➚ . If you do not accept such Terms of Service, including but not limited to all limitations and restrictions therein, you may not be able to use AutoNavi Maps Service in SAP Cloud for Customer. The use of AutoNavi Maps Service in or through SAP Cloud for Customer constitutes your acceptance of AutoNavi Terms of Service, and it can be terminated by SAP without reason at any time and SAP is not required to provide an equivalent service via another provider.
> As a prerequisite, please create a support ticket to obtain and use the SAP API key for AutoNavi Maps.

3.1.9 Configure Address Validation for Geo Tracking

Administrators can configure address validation for geo tracking using standard microservices from SAP Cloud Platform.

Prerequisite

When you purchase a license for the microservice, you are assigned a **Request URL** to access SAP DQM micro services. The URL is unique to your data center on SAP Cloud Platform and is required to activate integration with the SAP Cloud for Customer. You can access this URL under ▶ *SCP Cockpit* ❯ *Services* ❯ *Data Quality*

Services 〉 *Application URL* 〉 . Copy this URL to a notepad on your local machine. You assign this URL when configuring the integration in your cloud for customer system.

Steps for Configuring Microservice for Address Validation in SAP Cloud for Customer

1. Go to 〉 *Business Configuration* 〉 *Implementation Projects* 〉 . Select your project and navigate to 〉 *Edit Project Scope* 〉 *Questions* 〉 *Built in Services and Support* 〉 *Business Environment* 〉 *Addresses and Languages* 〉 and select the scoping question: *Do you want to use the Address Validation service?*
2. Create a communication system with name **Address Validation** (recommended name) under 〉 *Administrator* 〉 *General Settings* 〉 *Integration* 〉 *Communication Systems* 〉 . Further, under *Host Name*, enter the request URL.

> **i** Note
>
> Request URL is the Application URL that you have copied under Data Quality Services in SAP Cloud Platform. **Enter the URL without leading Https:// and without trailing /dq/AddressCleanse (as shown in the graphic below).**

3. Next, create a new communication arrangement under ▐ *Administrator* > *General Settings* > *Integration* >
   Communication Arrangements ▌. Create the communication arrangement with the same name as the
   communication system you created in the previous step.

COMMUNICATION ARRANGEMENTS: ALL COMMUNICATION ARRANGEMENTS (1)

Edit New Delete Check Completeness Edit Credentials Reactivate Edit API Keys						

You can view, create, and edit communication arrangements between your company and customers or suppliers with whom you wish to exchange business documents electronically.

All Communication Arran ▾   🔍   ⟳ address   ✕

Communication Scenario	Communication Type	Communication Partner ▲	My Compa...	St...	Predefined	Changed On
Address Validation	Application Integration	ADDRESS_VALIDATION		Active	☐	13.03.2017 09:23

Details: Address Validation

Enter the following settings for the communication arrangement:

- **Application Protocol: Http**
- **Authentication Method: SSL Client Certificate**
- **Certificate – SAP Business ByDesign System**

> **i Note**
>
> Download this certificate to your local machine. Upload this certificate to SAP Cloud Platform.

- **Host Name: the request url you maintained in the communication system is defaulted here**

Create a new communication scenario and assign the new communication arrangement to the new
communication scenario.

Configuration in SAP Cloud Platform

Upload the client certificate (that you have assigned to communication arrangement in Cloud for Customer
and downloaded to your local machine) to SAP Cloud Platform. For detailed documentation on importing client
certificate to SAP Cloud Platform and configuring client certificate authorization, see Client Certificate
Authorization.

Billing for DQM Service for Address Validation

The street address validation along with geo coding is enabled by default for each SAP Cloud for Customer to
SAP DQM micro service call. The following considerations apply as part of the address validation service:

- Street address validation and geo coding are considered as two different transactions by DQM service.
- Street and post office box addresses within the same address validation transaction are considered
  separately.

For detailed information on billing for these API calls, refer to Billing/Usage Information (Per API Call)

Additional Information

For detailed information on enabling and configuring DQM Microservices, see the documentation under Data
Quality Management, microservices for location data (DQM microservices).

3.1.10 Configure Address Type Ahead Search

Administrators can configure address type ahead search using standard microservices from SAP Cloud Platform.

Prerequisite

When you purchase a license for the microservice, you are assigned a **Request URL** to access SAP DQM micro services. The URL is unique to your data center on SAP Cloud Platform and is required to activate integration with the SAP Cloud for Customer. You can access this URL under ▌▶ *SCP Cockpit* ❭ *Services* ❭ *Data Quality Services* ❭ *Application URL* ▐. Copy *Address Cleanse URL* under *Available endpoints* to a notepad on your local machine. You assign this URL when configuring the integration in your cloud for customer system.

> **i Note**
>
> Do not use the URL under *Available endpoint when using client certificates*.

Configuration in SAP Cloud Platform

Generate OAuth 2.0 Client IDs and Token Values to configure in SAP Cloud Platform. For detailed documentation on generating OAuth 2.0 certificate to SAP Cloud Platform, see OAuth 2.0 Authorization.

Steps for Configuring Microservice for Address Type Ahead Search in SAP Cloud for Customer

1. Enable the scoping question as follows:

    1. Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯.

    2. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Built in Services and Support* ❯ *Business Environment* ❯ *Addresses and Languages* ❯.

    3. Select the scoping question: *Do you want to use the address type ahead search functionality?*

2. Configure Mashup Web Services
   There are two mashup web services need to be configured.

    1. *DQM Address Type Ahead* mashup service:

        1. Go to ▶ *Administrator* ❯ *Mashup Web Services* ❯.

        2. Select the pre delivered service (SW00095) and *Copy* the template to create new service.

            > **i Note**
            >
            > Under *General Information*, retain the *Service Name* and *Description* as it is.

        3. Under *Service Information*, update the necessary fields as:

            - *Authorization Method*: OAuth
            - *HTTP Method*: Post
            - *URL*: Maintain the Token Endpoint URL that is provided in OAuth settings from SAP Cloud Platform.
            - Enter the *Consumer Key* and *Consumer Secret* that you have created during OAuth settings.

            > **i Note**
            >
            > Ensure that you retain the other fields as it is.

        4. Click *Save* and *Activate*.

    2. *DQM Address Type Ahead Endpoint* mashup service:

        1. Go to ▶ *Administrator* ❯ *Mashup Web Services* ❯.

        2. Select the pre delivered service (SW00094) and *Copy* the template to create new service.

            > **i Note**
            >
            > Under *General Information*, retain the *Service Name* and *Description* as it is.

        3. Under *Service Information*, update the necessary fields:

            - *Authorization Method*: OAuth
            - *HTTP Method*: Post
            - *URL*: Maintain the *Address Cleanse URL* from *Available endpoints* list in SAP Cloud Platform.

            > **i Note**
            >
            > - Do not use the URL from *Available endpoints* when using client certificates list in SAP Cloud Platform.
            > - Ensure that you retain the other fields as it is.

4. Click *Save* and *Activate*.

> **i** Note
>
> Maintain only one mashup for Token and Service. Multiple mashups for the same will create inconsistency.

Billing for DQM Service for Address Type Ahead Search

The street address type ahead search is enabled by scoping question for each SAP Cloud for Customer to SAP DQM micro service call. The following considerations apply as part of the address type ahead search service:

- Street address type ahead search is considered as two different transactions by DQM service.
- Street and post office box addresses within the same address type ahead search transaction are considered separately.

For detailed information on billing for these API calls, refer to Billing/Usage Information (Per API Call).

Additional Information

For detailed information on enabling and configuring DQM Microservices, see the documentation under Data Quality Management, microservices for location data (DQM microservices).

3.1.11 Configure Duplicate Check

Administrators can configure duplicate check by maintaining weightages of parameters for the business partners.

Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Duplicate Check Weighting for Business Partners* ▌.

Additionally, you can scope **one** the following questions under ▌▶ *Business Configuration* ❯ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Edit Project Scope* ❯ *Questions* ❯ *General Business Data* ❯ *Business Partners* ❯ *Handling of Business Partners* ▌:

- Do you want to apply a strong check for duplicate business partners?
- Do you want to apply a medium check for duplicate business partners?
- Do you want to apply a weak check for duplicate business partners?
- Do you want to disable the duplicate check for business partners?
- Do you want to include obsolete business partners in the duplicate check?

3.1.12 Configure Custom Identifiers

Administrators can configure custom identifiers for accounts and individual customers and use them in a host of functions. The new tab *Identifiers* displays the identifiers you maintain for an account or individual customer.

Configure identification types under ▐▶ *Business Configuration* 〉 *Implementation Projects* ▐. Select your project and navigate to ▐▶ *Open Activity List* 〉 *General Business Partners* 〉 *Maintain Identification Types* ▐.

3.1.13 Enable Customer Merge

Administrators can enable customer merge for accounts and contacts.

Go to ▐▶ *Business Configuration* 〉 *Implementation Projects* ▐. Select your project and navigate to ▐▶ *Edit Project Scope* 〉 *Questions* 〉 *General Business Data* 〉 *Business Partners* 〉 *Handling of Business Partners* ▐ and select the scoping question: *Do you want to enable accounts merge?*

> **i Note**
>
> SAP does not recommend configuring customer merge if your customer master records are replicated with an external system (that is SAP ERP and SAP CRM integration is scoped). This is because a merge execution does not trigger a corresponding replication in the external system which may give rise to data inconsistency.

In order to initiate merge, you must have the *Data Cleansing* work center view assigned to user. In this work center view, click on *New* to trigger a manual merge. You can select a maximum of three customer records - one master and two duplicate records to be merged. Note that this action can be initiated only if the merge object is in one of the following statuses:

- Not Started
- Merge Failed
- Merge Completed
- Realignment Failed

For detailed troubleshooting information for customer merge, see the section - **Customer Merge FAQs**.

Related Information

Merging Marketing Permissions [page 212]

3.1.14 Configure ABC Classification

Administrators can configure ABC Classifications to maintain classification types.

To configure, go to ▶ *Business Configuration* 〉 *Implementation Projects* ▶ . Select your project and navigate to ▶ *Open Activity List* 〉 *Fine-Tune* 〉 *Accounts* ▶ , and choose *Maintain ABC Classifications for Accounts*.

3.1.15 Configure Marketing Permissions

Administrators can configure marketing permissions. With the communication categories, you can specify how often a customer can be contacted during a certain period of time.

In the *Marketing Permissions* fine-tune activity, you maintain your communication categories and the communication channels for countries/regions with an explicit opt-in. These settings are required to track whether your customers opt-in or opt-out for a specific communication channel.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* ▶ . Select your project and navigate to ▶ *Open Activity List* 〉 *Fine-Tune* ▶ and then select the *Marketing Permissions* activity from the activity list.

1. Maintain Communication Channels for Countries/Regions with an Explicit Opt-In:

   > ⚠ Caution
   >
   > It's the responsibility of your organization to comply with national legislation regarding data protection and the provision of marketing materials. Therefore, administrators must configure the solution for each country/region in which, or each customer with whom, your organization intends to conduct marketing activities and, to the extent legally required, make use of the option to store documents such as opt-in or opt-outs.

   To add a country/region where an explicit opt-in is required, click *Add Row*, enter the country/region and the corresponding communication channel, such as e-mail, letter or fax, and save your changes.

2. Maintain Communication Categories:
   1. To create a communication category, click *Add Row*
   2. Enter a communication category, a description, a limit, and the time frame. With the limit and time frame, you can specify how often a customer can be contacted during a certain period of time. When adding communication categories, we recommend starting with the letter Z
   3. Save your work.

3.1.16 Configure Attributes

You can define attributes or attribute sets and make them visible for users in the advanced searches for accounts, contacts, and individual customers.

Define Attributes and Attribute Sets

Administrators can configure attributes.

Go to ❚▶ *Administrator* ❭ *Sales and Campaign Settings* ❭ *Attributes* ❭ to view and configure attributes or attribute sets.

> **i Note**
>
> If your solution is integrated with SAP Customer Relationship Management (SAP CRM), then you can only view, but not create or modify, attributes or attribute sets from this screen.

As you maintain attributes, you can configure their characteristics (for example, whether they are mandatory), their value list and their descriptions in one or more languages. As you maintain attribute sets, which represent combinations of attributes, you can select the *Person-Relevant* checkbox to make the attributes visible in the *Attributes* tab of the *Contacts* work center view. You can also select the *Organization-Relevant* checkbox to make them visible in that tab on the *Accounts* or *Individual Customers* work center views.

Enable Search using Attributes

Provided if you personalize your solution to make it visible, you can enable your users to access the *Attributes* field within the advanced search of accounts, contacts and individual customers and maintain conditions there that influence the corresponding search behavior. Once this field is visible and your users select it to maintain conditions, they can specify a combination of attribute sets, attributes, operators and values – for example, Employee Attributes, Region, Equal, and North America, respectively – to apply to the attributes search. Users can also specify additional attribute conditions with the logical operator OR. Once these parameters have been saved, users can apply the associated conditions as an advanced search query to find business partners with corresponding Attributes, and to display them within the attributes tab of the work center view of the associated business partner.

Display in Account Summary

From the item details of an account, when you choose the [Summary] function, Attributes for the account now appear within the resultant account summary.

> **i Note**
>
> This enhancement only becomes available once you select ❚▶ *Administrator* ❭ *Form Template Maintenance* ❭ and then choose the *Account Summary* form template and revert to the most recent version.

Access Restrictions

You can configure the business roles in your solution to specify business access restriction BUSINESS_ATTRIBUTE_ASGNM_READ, thereby making attributes read-only for the associated business users

Attribute Data Source

You can use the new report Business Partner with attribute assignment, whose technical name is `CODBUSATTRBPB_Q0001`, to specify search criteria related to Attributes and to find corresponding business partners. Within this report, you can also right-click on the name of a business partner, then choose *Export All Account* and Contacts to New Target Group, to create a target group for the associated accounts and contacts.

Use in Analytics

To drive analytics in relation to attributes, you can use the following new data sources:

Data Sources for Attributes

Data Source ID	Data Source Name	Description
`CODBUSATTRBPB`	*Business Partner with Attribute Assignment*	Shows all Attribute values assigned to the reference business partners.
❖ Example CODBUSATTRGENB	*Attribute Assignment*	Contains all Attributes values assigned to the reference business objects.

3.1.17 Configure Target Groups

Administrators can configure target groups for accounts.

Define the following configuration for target groups:

- **Enable Target Groups**

  To configure target groups, go to ▶ *Business Configuration* ❯ *Implementation Projects* ◀. Select your project and navigate to ▶ *Open Activity List* ❯ *Sales Campaign* ❯ *Target Groups* ◀.

- **Sales Organization for Target Group**
  If you have used personalization to display the sales organization for a target group, the field is visible in the target group header data. This field defines the sales organization of the target group, such that employees who are assigned to that sales organization can view or edit target groups that belong to it.

- **Access Restrictions**

  To introduce access restrictions for target groups in your solution, choose ▶ *Administrator* ❯ *General Settings* ❯ *Users* ❯ *Business Roles* ◀ and edit the business role of interest. On the subsequent screen, in the *Access Restrictions* view, select the *Target Groups* work center view and define the read/write access as restricted, then provide the appropriate restrictions at the sales organization level.

Include Employees in Target Groups in E-mail Blasts

In the *E-mail Blasts* dialog, set the flag for *Include Employees* to allow marketing administrators to send e-mail blasts to employees listed in a target group. When you select this flag, the e-mail blast that will be sent out includes target group members (accounts, individual customers, contacts, etc) as well as the employees listed under the *Employees* tab screen

Various Possibilities for Creating Target Groups

You can create and maintain target groups from the following:

- Data Groups
  - **Add Members to Target Group**: A sales campaign administrator can create a target group and share the target group ID with the sales representatives who in turn can add their accounts to the target group. Note that each sales representative can add members without directly accessing the target group. Additionally, you can also use the *Create Target Group* menu option.
- **Target Group work center**: In the Members tab screen under Target Groups work center view, you can directly search for customers, contacts or accounts and then add them to the target group. Use the standard or extension field based search parameters to add members to the target groups. It also possible to search for based on marketing attributes and add them to the target group. You can also mass delete members within a target group using action *Remove from Target Group*.
- **External Sources**: Import target group member assignment from external source using excel add-in (under ❚▶ *Actions* ▶ *New from Microsoft Excel* ❚ or web services. A2A services area also available to import segmented target groups into the cloud solution.
- **Analytical Reports**: Use out of the box analytical reports provided in the solution to use strong analytical framework to filter member list and add them directly to a target group in just one single click. The following out of the box standard reports from which account /contacts can be exported to a new target group:
  1. `Accounts contact Data`- Sales Campaign administrator can slice and dice account contact data and create a target group from the report.
  2. `Accounts with Open activities` - Sales Campaign administrator can check for open activities / opportunities and create a target group.
  3. `Campaign Response Details` - This report lists all the responses provided by the members of a previous campaigns. The Contact and Account data can be segmented based on different criteria. The contacts can then be exported into a new target group.
- `Dynamic Target Groups` Define dynamic target groups using conditions within the target group. Based on these conditions, the application determines the members and adds them automatically to the target group.

Creating a Dynamic Target Group

1. In the *Target Groups* work center view under *Sales Campaign* work center, click on *New*.
2. Select the checkbox for *Member Determination* on the target group creation screen. The target group will be created with status *In Preparation*.

> **i Note**
>
> It is currently possible to create dynamic target groups only for accounts, contacts and individual customers.

Configuring Automatic Member Determination

1. **Maintain Conditions**
   1. From the target group worklist, select and open a dynamic target group. Note that the column 'Member Determination' is checked for dynamic target groups.
   2. Under the Member Determination tab, three tables are provided for maintaining the selection conditions for one type of business partner.

      > **i Note**
      >
      > The automatic member determination is currently supported for the following business partner types - *Account*, *Contact* and *Individual Customer*.

   3. Maintain the required conditions for each business partner type.
2. **Maintain the Determination Schedule**
   1. You now need to schedule the member determination process after you have maintained the conditions for business partner types. In the section - *Schedule*, you can schedule immediately or at a particular date and time. Additionally, it is also possible to specify a recurrence for this schedule.
3. **Activate the Member Determination Process**: Finally, you can initiate the member determination process by clicking on *Activate* (under *Actions*). This triggers the member determination process in the background. The member determination happens as a background job. The *Execution Status* displays the progress for activation. On successful activation, the target group status becomes *Active* and the execution status is set to *Scheduled*.

   > **i Note**
   >
   > *Activate* performs a dual function; it activates the target group and schedules the member determination process. While activation is a one-time activity, the *Activate* remains enabled as long as the target group is in status *In Preparation*.

4. **Deactivate Schedule**: Use this feature to adjust the determination conditions any time during the member determination process. This halts the determination process and the *Execution Status* is set to *Not Started*. However, the determination process cannot be halted if the *Execution Status* is set to *Running*. Finally, click on *Activate Schedule* to resume the determination process.

Maintain Conditions for Extension Fields

It is possible to define conditions for extension fields. However, note that the allowed selection criteria for member determination is the same in both dynamic and manual target group. For example, the set of attributes for which you can define conditions in the target group and the set of search fields on a static target group are same.

PREREQUISITE:The user has access to the Key User Tool authorization.

Follow these steps to define conditions for extension fields:

1. Create an extension field on the customer screen
2. Select an appropriate extension scenario. Note that in order to maintain the conditions for extension fields on the target group, the field must be extended in an appropriate extension scenario.
    1. Create an extension field.
    2. Save and open the edit screen for the extension field and navigate to the *Extension Scenarios* tab.
    3. Select the scenario `Account - General Information to Target Group - Account Selection` and add the extension field to this scenario.
3. Add the extension field to the Customer screen. You have created the extension field and now need to add this to the customer screen. To do this, in the *Additional Fields* dialog screen, select the checkbox and click on *Apply*.
4. Follow these steps to add the extension field to the search screen of static target group:
    1. Open a static target group (where the member determination is not configured).
    2. In the *Members* tab, click on *Add Accounts* under the *Add*.
    3. Add the extension field that you created for the account.

> **i Note**
>
> If the extension field is not added to the search dialog, then the member determination will not work for the created extension fields.

5. **Add the extension field to the conditions table**: Open the dynamic target group where you want to maintain conditions for the extension fields. In the *Account Condition* table, select and choose *Apply* to add the extension field.

> **i Note**
>
> The process of configuring conditions for extension fields is similar as described above for other member types (Contacts and Individual Customers).

3.1.18 Configure Blocking Reasons

Administrators can configure blocking reasons.

Go to ▶ *Business Configuration* ▶ *Implementation Projects* ▶. Select your project and navigate to ▶ *Open Activity List* ▶ *Fine-Tune* ▶ *Accounts* ▶, and maintain blocking reasons for the following:

- Delivery block reasons
- Billing block reasons
- Order block reasons
- Sales document order block assignment

3.1.19 Configure Blocks for External Follow-up Documents

Administrators can configure blocks for external follow-up documents. You can block external follow-up documents to SAP ERP for accounts marked as prospects

Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▌▶ *Edit Project Scope* ❯ *Questions* ❯ *Communication and Information Exchange* ❯ *Integration with External Applications and Solutions* ❯ *Integration with SAP ERP* ▐ and select the scoping question: *Do you want to block prospects created in your cloud solution from being replicated to your SAP ERP solution?*

3.1.20 Configure Relationships Including Buying Center

Administrators can configure relationships including buying center.

Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▌▶ *Open Activity List* ❯ *Fine-Tune* ❯ *General Business Partners* ▐. Under *General Business Partners*, define the possible relationships between business partners in your system. The standard solution provides relationship codes that you can use. Choose to define new relationship codes or even disable the standard codes. Note that certain standard relationship codes cannot be deactivated.

Enter a code for and the name of the relationship along with a description for both directions of the relationship, such as Has Contact for the relationship of business partner 1 with business partner 2 with business partner 1 being an organization. Depending on the relationship type, choose whether the business partner is a person or an organization, and select the business partner roles that are permitted for each of the business partners in the relationship.

Assign Relationships to Party Role in Party Role Definition

You can also link the relationships you define to party role in involved party. Do this, for example, if you want to automatically determine the party role in documents like lead, opportunity, sales quote, activities based on specific relationship.

Example: define a new custom Party Role "Reseller" that has the relationship "Has an OEM" assigned to it.

Sales Area Based Relationships

Configure sales area dependent relationships that are evaluated during transactions involving the accounts.

3.1.21 Configure Buying Center

Administrators can configure buying center based on business partner and buying center relationships..

Enable Buying Center based on Business Partner Relationships

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◀. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Account Management* ◀ and select the scoping question: *Do you want to enable buying center based on business partner relationships?*

Enable Buying Center based on Buying Center Relationships

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◀. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Account Management* ◀ and select the scoping question: *Do you want to enable buying center based on buying center relationships?*

3.1.22 Configure Account Teams

Administrators can configure account teams.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◀. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Party Role Definition* ◀ and create account teams based on roles. Standard roles are shipped in your system; Define custom roles such as Direct Sales, Product Expert, and so on.

3.1.23 Configure Business Add-In to Modify Org Units from MyTeams Employees

With BAdI `OrgUnitEmployeeMyTeamQueryModify` in the SAP Cloud Applications Studio, administrators can add or remove organizational units from which the employees for the *MyTeam* are derived.

With the *MyTeam* query for sales scenarios:

- For non-managers: The team is defined as Employees in the organization to which the logged on user is directly assigned, and employees in any organization subordinate to the logged on user's organization
- For managers (considering the reporting line):
  - Employees in any organization which the logged on user is assigned as manager, and employees in any organization subordinate to the organization logged on user is assigned as a manager.

- Employees in the organization to which the logged on user is directly assigned, and employees in any organization subordinate to the logged on user's organization.
- If the logged on user is not assigned to any position in any organization, then the team is just the employee.

> **i Note**
>
> You can assign a manager to an org. unit to support the manager's manager determination for approvals or workflows. This organizational assignment can lead to an unwanted *MyTeam* result for the manager according to the definition above. Another use case for the `OrgUnitEmployeeMyTeamQueryModify` BAdI is if you would like to remove the secondary team assignment in the *MyTeam* query.

3.1.24 Configure Account Hierarchies

Administrators can configure account hierarchies.

Go to ▶ *Business Configuration* > *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* > *Questions* > *Sales* > *Account and Activity Management* > *Account Management* ▶ and select the scoping question: *Do you want to use account hierarchies?* The structure that you create in SAP CRM system is displayed in the *Account Hierarchy* tab of an account. Expand and collapse the account hierarchy at any level to display as many or as few accounts as you like.

> **i Note**
>
> You need to migrate account hierarchies to your cloud solution. For detailed information on how to migrate account hierarchies, see

3.1.25 Configure Account Merge Without Party Re-determination

Your administrators can configure account merge without party re-determination.

Go to ▶ *Business Configuration* > *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* > *Questions* > *General Business Data* > *Business Partners* > *Handling of Business Partners* ▶ and select the scoping question: *Do you want to disable the party re-determination during account merge for open transactions?*

3.1.26 Configure Involved Party Roles

Administrators can configure involved party roles. Business partners is a collective term for all the organizations and people you interact with in your business, and includes accounts, contacts, partners, and

employees. When you create a document, you can designate a business partner as an involved party and assign them a role.

You can designate roles for sales quotes, leads, opportunities, service tickets, or activities. You can then automatically determine involved parties for these business transactions and documents using determination rules and master data.

The offline party determination is possible independent of the party role category; The following active determinations are supported in offline mode:

- Determine party via assigned relationship from account.
- Copy from account.
- Determine from logon user.

For detailed information, see Party Processing.

3.1.27 Configure Sales Data

Administrators can configure account sales data that includes distribution channel, division, sales area territory hierarchy level, price lists and price groups.

Administrators can configure account sales data.

Sales Area Distribution Channel

Go to ▌ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▌ *Open Activity List* ❯ *Fine-Tune* ❯ *Distribution Channel* ▐ to maintain distribution channels for your company. Additionally, assign the distribution channel to the org. structure for your company using the work distribution maintenance.

Division

Go to ▌ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▌ *Open Activity List* ❯ *Fine-Tune* ❯ *Division* ▐ to define divisions in your company.

Sales Area Territory Hierarchy Level

Go to ▌ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▌ *Open Activity List* ❯ *Fine-Tune* ❯ *Sales Territory Hierarchy Level* ▐ to create the root sales territory and other territory levels.

Related Information

For more information, see Configuring Divisions.

3.1.28 Configure Business Add-In to Enhance Sales Area Access Context Transactions

With BAdI `CustomAccessControlListWrite` in SAP Cloud Applications Studio administrators can enhance the access context of transactions by an own implementation using the sales area.

In previous releases, the BAdI allowed you to:

- Add all territories from account to the access context.
- Remove territory, sales area, and involved parties with certain party role from the access context, for example based on an extension field, such as an confidential indicator.

In this release, you can also add sales areas (sales organization, distribution channel, division) to the access context.

> **i Note**
>
> The BAdI is available for *Leads*, *Opportunities*, *Sales Quotes*, *Sales Orders*, *Contracts*, *Service Tickets*, and *Activities*.
>
> This BAdI allows administrators to replace the SAP standard access control logic for your business users. You should be very careful when implementing, testing and using this enhancement. Go to ▶ *Administrator* ▶ *General Settings* ▶ *Check User's Authorization* ▶ to check the access context of a transaction.

> **→ Remember**
>
> The BAdI does not allow control of a different access behavior for write and read access.
>
> The BAdi does not allow you to add additional access context other than context 1015, such as adding the *Document Type* to the access context.

3.1.29 Configure Customer Groups

Administrators can configure customer groups under ▶ *Business Configuration* ▶ *Implementation Projects* ▶. Select your project and navigate to ▶ *Open Activity List* ▶ *Fine-Tune* ▶ *Accounts* ▶ *Maintain Customer Groups* ▶.

3.1.30 Configure Payment Terms

Administrators can configure payment terms.

Go to ▎▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▎▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Accounts* ❭ *Maintain Payment Terms* ❭ to maintain payment terms.

3.1.31 Configure Delivery Priority

Administrators can configure delivery priorities in your SAP Cloud for Customer system and maintain a mapping to values in SAP ERP system. Prior to this release, it was only possible to map to fixed values from SAP ERP.

Maintain the configuration under ▎▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▎▶ *Open Activity List* ❭ *General Business Data* ❭ *Business Partners* ❭ *Handling of Business Partners* ❭ *Accounts* ❭ *Maintain Delivery Priority* ❭.

3.1.32 Configure Tax Number Types

Administrators can configure tax number types.

Go to ▎▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▎▶ *Open Activity List* ❭ *Fine-Tune* ❭ *General Business Partner* ❭ *Maintain Tax Number Types* ❭ and add new tax number types and mark them as *Active*.

3.1.33 Configure Territory Based Determination

Administrators can assign territory and create rules for territory based determination.

Go to ▐▶ *Administrator* ❭ *Sales and Campaign Settings* ❭, you can select:

- *Territories* to define new territories and assign accounts to them.
- *Define Rules for Territories Realignment* to define new rules for a realignment run
- *Realignment Run* to define schedule a realignment run and even define new rules for territory based alignment for accounts.

3.1.34 Configure Sales Territory Hierarchy Level

Administrators can configure territory hierarchy levels.

Go to ▐▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▐▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Territory Hierarchy Level* ❭ to maintain territory hierarchy levels.

3.1.35 Web Services for Business Partner End-of-Purpose

Determine if you need to retain business partner data in your system when that data has already been deleted from an integrated external system.

The following graphic describes process flow to determine the End-of-Purpose for your business partner data. You can use web services or manually block such business partners in your system using blocking reasons.

Web service interfaces and enhanced interfaces are enabled to support blocking of business partners. Use these services in scenarios where integrated external systems block or delete business partner data in their

system landscape. These interfaces allow the external systems to query and maintain the End-of-Purpose for business partners. Since the definition of what constitutes the end-of-purpose for a business partner is subjective to the external system, these interfaces are empty CHECK interfaces to allow you to create custom queries.

For business partners blocked using the below mentioned interfaces, data cannot be retrieved in list views in work centers, value help in related fields, values selectors, analytics, duplicate checks and web service or oData queries in the application.

Web Services for Business Partner End-of-Purpose

Web Service	Description
II_BUPA_EOP_CHECK_IN	This interfaces uses enhancement spot ES_BUPA_EOP_CHECK to provide a business add-in hook in SAP Cloud Application Studio. Use this hook to create custom query for setting end-of-purpose information.
II_BUPA_EOP_MAINTAIN_IN	Use this interface to set the *End-of-Purpose* flag for business partners. If this flag is set, then the business partner data is hidden in corresponding work centers and value helps and is not visible to users. Note that the data can be viewed by administrators in the *Data Protection and Privacy* work center.
II_BUPA_ERP_EOP_CHECK_IN	This interface uses enhancement spot ES_BUPA_ERP_EOP_CHECK to provide a business add-in hook in SAP Cloud Application Studio. Use this hook to create custom query for setting end-of-purpose information.
II_BUPA_ERP_REPL_IN	New attribute has been added in element structure for the existing interface. Set the indicator for business completed / End-of-Purpose flag. If this flag is set, then the business partner data is hidden in corresponding work centers and value helps and is not visible to users. Note that the data can be viewed by administrators in the *Data Protection and Privacy* work center.

3.1.36 Configure Default Mapping ID Batch Job for Business Partners

Your SAP Cloud for Customer solution is integrated with other systems. The customer account, employee, or contact record from each system has its own unique identifier. Administrators can configure ID mapping to assign one account ID to be used for all system account records in a batch job.

Your business works with multiple external systems that exchange data. Customer records are created in each system. Yet each record contains its own unique identifier. SAP Cloud for Customer administrators can map a default ID to work with one identifier to be used, for example, with, accounts, list prices, and print forms. If administrators don't select a default ID, the solution chooses an arbitrary ID as the default.

Example

Your SAP Cloud for Customer (System A) solution is integrated with two other systems (System B, System C). System A, B, and C each have their own IDs for a customer account, employee, or, contact record.

In SAP Cloud for Customer, records receive an ID mapping, which is used by any of the integrated systems to know how they identify the customer record. Here the external system understands the account identifier as 498, but system B uses ID XT6932, and system C uses ID 2754834.

System	ID (Account or Employee)	External System ID	External ID
A	498	XCCInt426	038
B	XT6932		
C	2754834		

Configure a Preferred Account or Employee Default ID

1. Go to ▐▶ *Administrator* ❯ *ID Mapping for Integration* ❯ *Edit Default Configuration* ▐ .
2. Click *Add Row*.

   > **i Note**
   >
   > The account external ID is the default external ID (Schema Code 918).

3. Click *Add Row*.
4. From the *Object* field, select *Account*.
5. In the *Schema Code* field, select one of the following:
   - *888 - Business Partner ID*
   - *918 - ERP Customer ID*
   - *988 - Business Partner External ID*

   > **i Note**
   >
   > For *Employee*, select one of the following *Schema Code* fields:
   >
   > - *3 - ERP Employee ID*
   > - *888 - Business Partner ID*
   > - *988 - Business Partner External ID*

6. From the *Remote System* row, enter or search for the system.
7. Save your entries.
8. After configuration, click ▐▶ *Select Object* ❯ *Click Migrate Data* ▐ . Depending on your data volume, after approximately 1 hour, the migration batch job is complete. You can view the status from the UI.

> **i Note**
>
> There's a migration of 300 kilobytes (kB) `ObjectIdentifierMapping` rows per hour. If the data volume is below 300 kB, the migration occurs o the first execution job. If data volume is above 300 kB, migration spans over several hours since only a 300-kB records migration is possible.

> **i Note**
>
> You set the account external ID default is set to Schema Code 918. If more than one account external ID exists in various integrated systems, the SAP Cloud for Customer solution uses the first one.

> **i Note**
>
> The employee external ID default is set to Schema Code 3. If more than one employee external IDs exist in various integrated systems, the SAP Cloud for Customer solution uses the first one.

Configure a Preferred Contact Default ID

Administrators can configure a preferred contact default ID, that is used in all integrated systems.

1. Go to ▶ *Administrator* 〉 *ID Mapping for Integration* 〉 *Edit Default Configuration* 〉.
2. Click *Add Row*. The account external ID is the default external ID (Schema Code 918).
3. Click *Add Row*.

   > **i Note**
   >
   > There's only one contact relationship, so the contact external ID is the default external ID (Schema Code 918).
   >
   > More than one contact relationship for one contact and one contact relationship is marked as the main relationship. Therefore, the remote external ID is set to the default external ID.

4. From the *Object* field, select *Contact*.
5. In the *Schema Code* field, select one of the following:
   ○ *888 - Business Partner ID*
   ○ *927 - ERP Contact Partner ID*
6. Save your entries.
7. After configuration, click ▶ *Select Object* 〉 *Click Migrate Data* 〉. Depending on your data volume, after approximately 1 hour, the migration batch job is complete.

> **i Note**
>
> The Contact external ID default is set to schema code 927. More than one Contact external ID exists in various integrated systems and one contact relationship is marked as the *Main* relationship. Then, the SAP Cloud for Customer solution selects an arbitrary ID as the default indicator for one of the existing remote IDs.
>
> If no contact relationship is marked as main, a random relationship is chosen and the remote external ID is set to the default external IDs.

3.2 Maintain Account Data

Account master data is key information that is required for various sales transactions such as leads, opportunities, quotes and orders.

Customer Roles [page 184]

> Define default customer roles for a customer type. The role is assigned to customers of that type. Additionally, you can change the description of a standard role provided by SAP to suit your business requirement.

Party Roles [page 184]

> Define business partners as involved parties and assign them involved party roles.

Relationships Between Accounts and Buying Center Relationships [page 185]

> Account relationships represent relationships between accounts as well as between accounts and persons and other business partners such as partners and partner contacts.

Buying Center [page 186]

> Buying center refers to all those members of an organization who are key stakeholders and are involved in the buying process.

Account Teams [page 187]

> Define teams within your organization to manage business with customers.

Account Hierarchy [page 187]

> An account hierarchy is a collection of accounts linked to each other through a parent-child relationship.

ABC Classification [page 188]

> Maintain ABC Classification type to categorize accounts based on their importance within your organization..The standard solution offers four levels of categorization, namely A, B, C and D accounts.

Status [page 188]

> Manually set an account status to *Set to Active*, *Obsolete* or *Block an Account*.

Visit Types [page 189]

> Create specific visit types such as Business Review, Sales Visit and maintain details such as recommended frequency and duration of visit.

Attributes [page 190]

> Attributes can be attached to an object to define additional characteristics of the objects. In the solution, attributes can be associated with different objects like account, contact, individual customer and so on.

Account Blocks [page 193]

> Use blocking reasons that you configure to block accounts for specific functions.

Payment Terms [page 194]

> Payment terms associated with the sales data of an account.

Tax Numbers [page 195]

> Tax numbers associated with the organizational data for an account.

Target Groups [page 196]

> Groups of accounts created as a target group for sales campaigns.

Customer Groups [page 199]

Customer groups within an organizational unit.

Identifiers [page 200]

Assign additional identifiers when creating accounts and individual customers and trigger a duplicate check using the identifier. Bi-directional replication of these identifiers between SAP Cloud for Customer and SAP ERP / SAP S/4HANA is also possible.

Competitor and Competitor Product [page 200]

Add *Competitor* and *Competitor Product* information in accounts instead of checking a list of past opportunities.

3.2.1 Customer Roles

Define default customer roles for a customer type. The role is assigned to customers of that type. Additionally, you can change the description of a standard role provided by SAP to suit your business requirement.

3.2.1.1   Configure Default Customer Roles

Administrators can define customer roles.

To maintain the required configuration, go to ▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▶ *Open Activity List* ❭ *Accounts* ❭ *Maintain Customer Roles* ❭.

3.2.2 Party Roles

Define business partners as involved parties and assign them involved party roles.

Assign the party roles to account teams, territory teams and as involved parties. You can also asssign multiple involved parties to a business partner (account, contact and individual customer). For example, you can have an involved party assigned to an account, as a ship-to-party, as a partner and a competitor.

You can make multiple role assignments:

- In the account quick create, when you trigger a duplicate check and the system displays accounts with similar names and data that you can select from.
- In the launch screen with business partner datasets, when you select edit and change the role assigned to an account.

3.2.2.1   Configure Involved Party Roles

Administrators can configure involved party roles. Business partners is a collective term for all the organizations and people you interact with in your business, and includes accounts, contacts, partners, and

employees. When you create a document, you can designate a business partner as an involved party and assign them a role.

You can designate roles for sales quotes, leads, opportunities, service tickets, or activities. You can then automatically determine involved parties for these business transactions and documents using determination rules and master data.

The offline party determination is possible independent of the party role category; The following active determinations are supported in offline mode:

- Determine party via assigned relationship from account.
- Copy from account.
- Determine from logon user.

For detailed information, see Party Processing.

3.2.3 Relationships Between Accounts and Buying Center Relationships

Account relationships represent relationships between accounts as well as between accounts and persons and other business partners such as partners and partner contacts.

Use the relationships that you have configured to assign relationship between Accounts, Contacts, Partners, Partner Contacts and so on, based on your business needs.

Relationship types are mostly bi-directional, such as *Has a Reseller / Is a Reseller of*. Standard relationship types are configured in the cloud solution; You can also create custom-defined relationship types and maintain them for sales areas.

In the advanced search for accounts, use account relationships to search for accounts. Two fields, *Related-To* and *Relationship Role* enable search based on relationships.

3.2.3.1   Configure Relationships Including Buying Center

Administrators can configure relationships including buying center.

Go to ▐▶ *Business Configuration* ▶ *Implementation Projects* ▌. Select your project and navigate to ▐▶ *Open Activity List* ▶ *Fine-Tune* ▶ *General Business Partners* ▌.Under *General Business Partners*, define the possible relationships between business partners in your system. The standard solution provides relationship codes that you can use. Choose to define new relationship codes or even disable the standard codes. Note that certain standard relationship codes cannot be deactivated.

Enter a code for and the name of the relationship along with a description for both directions of the relationship, such as Has Contact for the relationship of business partner 1 with business partner 2 with business partner 1 being an organization. Depending on the relationship type, choose whether the business partner is a person or an organization, and select the business partner roles that are permitted for each of the business partners in the relationship.

Assign Relationships to Party Role in Party Role Definition

You can also link the relationships you define to party role in involved party. Do this, for example, if you want to automatically determine the party role in documents like lead, opportunity, sales quote, activities based on specific relationship.

Example: define a new custom Party Role "Reseller" that has the relationship "Has an OEM" assigned to it.

Sales Area Based Relationships

Configure sales area dependent relationships that are evaluated during transactions involving the accounts.

3.2.4 Buying Center

Buying center refers to all those members of an organization who are key stakeholders and are involved in the buying process.

Use buying center to collaborate with accounts and contacts using various channels. In the *Buying Center* tab, map key stakeholders (involved in buying process) along with their relationships. Information that you create here is copied for opportunities.

3.2.4.1   Configure Buying Center

Administrators can configure buying center based on business partner and buying center relationships..

Enable Buying Center based on Business Partner Relationships

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◀. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Account Management* ◀ and select the scoping question: *Do you want to enable buying center based on business partner relationships?*

Enable Buying Center based on Buying Center Relationships

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◀. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Account Management* ◀ and select the scoping question: *Do you want to enable buying center based on buying center relationships?*

3.2.5 Account Teams

Define teams within your organization to manage business with customers.

Standard solution provides two roles - *Account Team Member* and *Employee Responsible - Sales* (this role corresponds to the account owner and therefore has only one member assigned to this role). Maintain account team members for sales areas and assign them a validity. Additionally, use account teams to:

- Manage accounts and assign activities automatically during various business processes.
- Add employees to account teams (key user authorization required)
- Assign an account to a territory. With this assignment, all users assigned to the territory appear under the *Sales Territory Team* in the *Account Team* tab.
- Define custom roles (such as Direct Sales, Product Expert, and so on) for account team using the **Party Role Definition** fine-tuning activity.

3.2.5.1 Configure Account Teams

Administrators can configure account teams.

Go to ▷ *Business Configuration* ⟩ *Implementation Projects* ◁. Select your project and navigate to ▷ *Open Activity List* ⟩ *Fine-Tune* ⟩ *Party Role Definition* ◁ and create account teams based on roles. Standard roles are shipped in your system; Define custom roles such as Direct Sales, Product Expert, and so on.

3.2.6 Account Hierarchy

An account hierarchy is a collection of accounts linked to each other through a parent-child relationship.

Account hierarchies are possible only for corporate accounts (and not for individual customer accounts).

Use account hierarchy to:

- Map complex organizational structures of a business partner (for example, buying group, co-operative or chain of retail outlets). In the *Account Hierarchy* tab screen view, you can map account structures in an account.
- Map the complex organizational structure of a large customer with multiple levels of subsidiaries.
- Link an account to a parent account using the *Parent Account* field. Note that a child account can have only one parent account.
- Review the active pipeline for a child account and also the roll-up values for its parent account.

3.2.6.1 Configure Account Hierarchies

Administrators can configure account hierarchies.

Go to ❘▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ❘▶ *Edit Project Scope* ❭ *Questions* ❭ *Sales* ❭ *Account and Activity Management* ❭ *Account Management* ❭ and select the scoping question: *Do you want to use account hierarchies?* The structure that you create in SAP CRM system is displayed in the *Account Hierarchy* tab of an account. Expand and collapse the account hierarchy at any level to display as many or as few accounts as you like.

> **i Note**
>
> You need to migrate account hierarchies to your cloud solution. For detailed information on how to migrate account hierarchies, see

3.2.7 ABC Classification

Maintain ABC Classification type to categorize accounts based on their importance within your organization..The standard solution offers four levels of categorization, namely A, B, C and D accounts.

3.2.7.1 Configure ABC Classification

Administrators can configure ABC Classifications to maintain classification types.

To configure, go to ❘▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ❘▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Accounts* ❭, and choose *Maintain ABC Classifications for Accounts*.

3.2.8 Status

Manually set an account status to *Set to Active*, *Obsolete* or *Block an Account*.

To set status for multiple accounts at a time, select the accounts in the *Accounts* dataset (*Accounts* work center view launch page) and apply the appropriate actions under *More* menu. Alternatively, apply the status on individual accounts (or individual customers and contacts) using the *Actions* menu in the object detailed view.

> **i Note**
>
> Administrators must enable this feature using *Adaptation* mode.

3.2.8.1 Define Workflows to Copy Account Status to Contacts

Use workflow actions to copy account status to its contacts.

Define workflows to automatically update account status for all its related contacts or use these workflow actions to trigger updates to contact statuses when an account status gets updated. The three workflow actions to support this feature are:

- *Activate Related Contacts*
- *Block Related Contacts*
- *Flag Related Contact as Obsolete*

3.2.8.2 Workflow Actions Supported for Accounts

Extensive workflow support for the accounts business object.

Apart from the standard workflow features, following workflow actions are supported for the accounts business object:

- Activate
- Activate Related Contacts
- Assign Me as Owner
- Block
- Block Related Contacts
- Create Sales Data for My Default Sales Responsibles
- Derive Territories
- Flag As Obsolete
- Flag Related Contact as Obsolete
- Revoke Obsolescence
- Unblock

3.2.9 Visit Types

Create specific visit types such as Business Review, Sales Visit and maintain details such as recommended frequency and duration of visit.

Some example use-case scenarios are:

- Visit type - Stock check once every week for 30 minutes
- Visit type - Monthly business review once every month
- Visit type - Annual target setting, once every year

All visits of a customer must be assigned to a valid visit type that you configure in the business configuration fine-tuning. The *Visit Details* table in the *Visits by Sales Area* tab displays a snapshot of visit type, recommended frequency, visit duration, and so on. Note that these details are not directly dependent on account or individual customer sales data.

> **i Note**
>
> The visit header details continue to be displayed in the *Visits* tab in customers.

> **i Note**
>
> Administrators must enable this feature in your system.

3.2.9.1 Configure Visit Types

Administrators can configure visit types based on your business requirements.

Go to ▶ *Business Configuration* > *Implementation Projects* ◀. Select your project and navigate to ▶ *Open Activity List* > *Fine-Tune* > *Maintain Visit Types* ◀. All visits that you maintain must be assigned to a valid visit type.

3.2.10 Attributes

Attributes can be attached to an object to define additional characteristics of the objects. In the solution, attributes can be associated with different objects like account, contact, individual customer and so on.

Attributes can be of different data types and can by grouped together into an attribute set. You can set different properties of an attribute like negative value allowed, intervals allowed, multi-value allowed and so on.

A very common use of attributes is to create target groups. For example, if you are a credit card company and want to create a target group for customers traveling internationally, then you can create an attribute named as International traveler with a value list YES or NO. Every time your customer spends some money outside your country using your card you can automatically update International traveler as YES. Subsequently, you can create a target group of customers where the value of attribute International traveler is YES and send them promotions like low exchange rate for international traveler or low interest rate if they buy ticket through your company using your credit card.

> **i Note**
>
> Attributes are available in HTML and Responsive UI, in both online and offline mode.

3.2.10.1 Configure Attributes

You can define attributes or attribute sets and make them visible for users in the advanced searches for accounts, contacts, and individual customers.

Define Attributes and Attribute Sets

Administrators can configure attributes.

Go to ▎▶ *Administrator* ❯ *Sales and Campaign Settings* ❯ *Attributes* ▎to view and configure attributes or attribute sets.

> **i Note**
>
> If your solution is integrated with SAP Customer Relationship Management (SAP CRM), then you can only view, but not create or modify, attributes or attribute sets from this screen.

As you maintain attributes, you can configure their characteristics (for example, whether they are mandatory), their value list and their descriptions in one or more languages. As you maintain attribute sets, which represent combinations of attributes, you can select the *Person-Relevant* checkbox to make the attributes visible in the *Attributes* tab of the *Contacts* work center view. You can also select the *Organization-Relevant* checkbox to make them visible in that tab on the *Accounts* or *Individual Customers* work center views.

Enable Search using Attributes

Provided if you personalize your solution to make it visible, you can enable your users to access the *Attributes* field within the advanced search of accounts, contacts and individual customers and maintain conditions there that influence the corresponding search behavior. Once this field is visible and your users select it to maintain conditions, they can specify a combination of attribute sets, attributes, operators and values – for example, Employee Attributes, Region, Equal, and North America, respectively – to apply to the attributes search. Users can also specify additional attribute conditions with the logical operator OR. Once these parameters have been saved, users can apply the associated conditions as an advanced search query to find business partners with corresponding Attributes, and to display them within the attributes tab of the work center view of the associated business partner.

Display in Account Summary

From the item details of an account, when you choose the [Summary] function, Attributes for the account now appear within the resultant account summary.

> **i Note**
>
> This enhancement only becomes available once you select ▌ *Administrator* ❯ *Form Template*
> *Maintenance* ❯ and then choose the *Account Summary* form template and revert to the most recent
> version.

Access Restrictions

You can configure the business roles in your solution to specify business access restriction
BUSINESS_ATTRIBUTE_ASGNM_READ, thereby making attributes read-only for the associated business users

Attribute Data Source

You can use the new report Business Partner with attribute assignment, whose technical name is
`CODBUSATTRBPB_Q0001`, to specify search criteria related to Attributes and to find corresponding business
partners. Within this report, you can also right-click on the name of a business partner, then choose *Export All*
Account and Contacts to New Target Group, to create a target group for the associated accounts and contacts.

Use in Analytics

To drive analytics in relation to attributes, you can use the following new data sources:

Data Sources for Attributes

Data Source ID	Data Source Name	Description
CODBUSATTRBPB	*Business Partner with Attribute Assignment*	Shows all Attribute values assigned to the reference business partners.
❖ Example CODBUSATTRGENB	*Attribute Assignment*	Contains all Attributes values assigned to the reference business objects.

3.2.10.2 Configure Marketing Permissions

Administrators can configure marketing permissions. With the communication categories, you can specify how often a customer can be contacted during a certain period of time.

In the *Marketing Permissions* fine-tune activity, you maintain your communication categories and the communication channels for countries/regions with an explicit opt-in. These settings are required to track whether your customers opt-in or opt-out for a specific communication channel.

Go to ▌ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▌ *Open Activity List* ❯ *Fine-Tune* ▐ and then select the *Marketing Permissions* activity from the activity list.

1. Maintain Communication Channels for Countries/Regions with an Explicit Opt-In:

> ⚠ Caution
>
> It's the responsibility of your organization to comply with national legislation regarding data protection and the provision of marketing materials. Therefore, administrators must configure the solution for each country/region in which, or each customer with whom, your organization intends to conduct marketing activities and, to the extent legally required, make use of the option to store documents such as opt-in or opt-outs.

   To add a country/region where an explicit opt-in is required, click *Add Row*, enter the country/region and the corresponding communication channel, such as e-mail, letter or fax, and save your changes.

2. Maintain Communication Categories:
   1. To create a communication category, click *Add Row*
   2. Enter a communication category, a description, a limit, and the time frame. With the limit and time frame, you can specify how often a customer can be contacted during a certain period of time. When adding communication categories, we recommend starting with the letter Z
   3. Save your work.

3.2.11 Account Blocks

Use blocking reasons that you configure to block accounts for specific functions.

You can configure the following blocking reasons to block accounts:

- Delivery Block Reasons
  Reasons that you would like to use to block delivery for accounts.
- Billing Block Reasons
  Reasons that you would like to use to block billing for specific accounts.
- Order Block Reasons
  Reasons that you would like to use to block sales order creation for accounts.

> ℹ Note
>
> The blocking reasons that you maintain here must be mapped to the blocking reasons configured in ERP system.

- Sales Document Order Block Assignment

Reasons that you would like to use to block sales document creation for accounts.

3.2.11.1 Configure Blocking Reasons

Administrators can configure blocking reasons.

Go to ▶ *Business Configuration* ▶ *Implementation Projects* ◢. Select your project and navigate to ▶ *Open Activity List* ▶ *Fine-Tune* ▶ *Accounts* ◢, and maintain blocking reasons for the following:

- Delivery block reasons
- Billing block reasons
- Order block reasons
- Sales document order block assignment

3.2.11.2 Configure Blocks for External Follow-up Documents

Administrators can configure blocks for external follow-up documents. You can block external follow-up documents to SAP ERP for accounts marked as prospects

Go to ▶ *Business Configuration* ▶ *Implementation Projects* ◢. Select your project and navigate to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Communication and Information Exchange* ▶ *Integration with External Applications and Solutions* ▶ *Integration with SAP ERP* ◢ and select the scoping question: *Do you want to block prospects created in your cloud solution from being replicated to your SAP ERP solution?*

3.2.12 Payment Terms

Payment terms associated with the sales data of an account.

Maintain payment terms for an account to specify when an invoice has to be paid and whether a discount is applicable if payment is made before the due date.

3.2.12.1 Configure Payment Terms

Administrators can configure payment terms.

Go to ▶ *Business Configuration* ▶ *Implementation Projects* ◢. Select your project and navigate to ▶ *Open Activity List* ▶ *Fine-Tune* ▶ *Accounts* ▶ *Maintain Payment Terms* ◢ to maintain payment terms.

3.2.13 Tax Numbers

Tax numbers associated with the organizational data for an account.
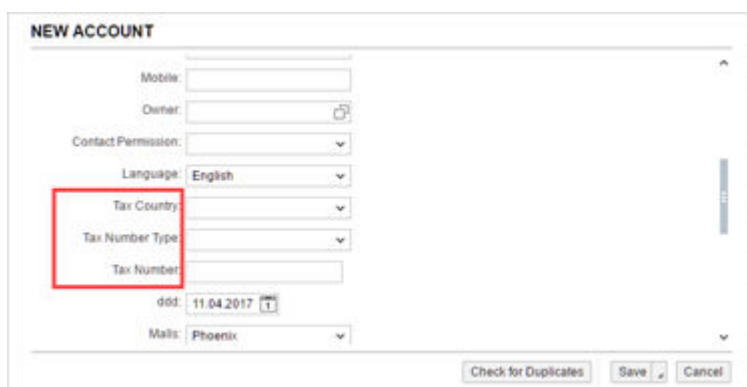
Improve compliance for accounts and customers using tax numbers. You can:

- Add new tax number types, activate, or deactivate from the list delivered in the standard system.

> **i Note**
>
> Tax number types are used as Social Security Numbers in some countries/regions. However, in, SAP Cloud for Customer the number types are used for duplication check and data capture. For compliance reasons, you can deactivate specific tax number types (such as the ones used as Social Security Numbers) for compliance reasons. For detailed information on this topic, refer to the Security Guide for SAP Cloud for Customer.

.

- Leverage the complete list of tax number types available from your on-premise systems
- Search for a business partner using tax number in the advanced search of the enterprise-wide search. Example scenarios include tax numbers that are also used as social security numbers.
- Use tax numbers as additional identifiers for business partners. The additional identifiers are used when duplicate check is triggered for accounts.

> **i Note**
>
> No validations are available for tax numbers in the cloud solution. You can add validations using the SAP Cloud Applications Studio. Appropriate validations are however available in the ERP on-premise system.

3.2.13.1 Configure Tax Number Types

Administrators can configure tax number types.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◼. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *General Business Partner* ❯ *Maintain Tax Number Types* ◼ and add new tax number types and mark them as *Active*.

3.2.14 Target Groups

Groups of accounts created as a target group for sales campaigns.

Create target groups and export your accounts and contacts to these target groups. Standard out-of-the-box reports are provided to create and segment account data.

3.2.14.1 Configure Target Groups

Administrators can configure target groups for accounts.

Define the following configuration for target groups:

- **Enable Target Groups**

  To configure target groups, go to ▶ *Business Configuration* ❯ *Implementation Projects* ◢. Select your project and navigate to ▶ *Open Activity List* ❯ *Sales Campaign* ❯ *Target Groups* ◢.

- **Sales Organization for Target Group**
  If you have used personalization to display the sales organization for a target group, the field is visible in the target group header data. This field defines the sales organization of the target group, such that employees who are assigned to that sales organization can view or edit target groups that belong to it.

- **Access Restrictions**

  To introduce access restrictions for target groups in your solution, choose ▶ *Administrator* ❯ *General Settings* ❯ *Users* ❯ *Business Roles* ◢ and edit the business role of interest. On the subsequent screen, in the *Access Restrictions* view, select the *Target Groups* work center view and define the read/write access as restricted, then provide the appropriate restrictions at the sales organization level.

Include Employees in Target Groups in E-mail Blasts

In the *E-mail Blasts* dialog, set the flag for *Include Employees* to allow marketing administrators to send e-mail blasts to employees listed in a target group. When you select this flag, the e-mail blast that will be sent out

includes target group members (accounts, individual customers, contacts, etc) as well as the employees listed under the *Employees* tab screen

Various Possibilities for Creating Target Groups

You can create and maintain target groups from the following:

- Data Groups
  - **Add Members to Target Group**: A sales campaign administrator can create a target group and share the target group ID with the sales representatives who in turn can add their accounts to the target group. Note that each sales representative can add members without directly accessing the target group. Additionally, you can also use the *Create Target Group* menu option.
- **Target Group work center**: In the Members tab screen under Target Groups work center view, you can directly search for customers, contacts or accounts and then add them to the target group. Use the standard or extension field based search parameters to add members to the target groups. It also possible to search for based on marketing attributes and add them to the target group. You can also mass delete members within a target group using action *Remove from Target Group*.
- **External Sources**: Import target group member assignment from external source using excel add-in (under ▌▶ *Actions* ▶ *New from Microsoft Excel* ▌ or web services. A2A services area also available to import segmented target groups into the cloud solution.
- **Analytical Reports**: Use out of the box analytical reports provided in the solution to use strong analytical framework to filter member list and add them directly to a target group in just one single click. The following out of the box standard reports from which account /contacts can be exported to a new target group:
  1. `Accounts contact Data`- Sales Campaign administrator can slice and dice account contact data and create a target group from the report.
  2. `Accounts with Open activities` - Sales Campaign administrator can check for open activities / opportunities and create a target group.
  3. `Campaign Response Details` - This report lists all the responses provided by the members of a previous campaigns. The Contact and Account data can be segmented based on different criteria. The contacts can then be exported into a new target group.
- `Dynamic Target Groups` Define dynamic target groups using conditions within the target group. Based on these conditions, the application determines the members and adds them automatically to the target group.

Creating a Dynamic Target Group

1. In the *Target Groups* work center view under *Sales Campaign* work center, click on *New*.
2. Select the checkbox for *Member Determination* on the target group creation screen. The target group will be created with status *In Preparation*.

> **i** Note
>
> It is currently possible to create dynamic target groups only for accounts, contacts and individual customers.

Configuring Automatic Member Determination

1. **Maintain Conditions**
    1. From the target group worklist, select and open a dynamic target group. Note that the column 'Member Determination' is checked for dynamic target groups.
    2. Under the Member Determination tab, three tables are provided for maintaining the selection conditions for one type of business partner.

        > **i Note**
        >
        > The automatic member determination is currently supported for the following business partner types - *Account*, *Contact* and *Individual Customer*.

    3. Maintain the required conditions for each business partner type.
2. **Maintain the Determination Schedule**
    1. You now need to schedule the member determination process after you have maintained the conditions for business partner types. In the section - *Schedule*, you can schedule immediately or at a particular date and time. Additionally, it is also possible to specify a recurrence for this schedule.
3. **Activate the Member Determination Process**: Finally, you can initiate the member determination process by clicking on *Activate* (under *Actions*). This triggers the member determination process in the background. The member determination happens as a background job. The *Execution Status* displays the progress for activation. On successful activation, the target group status becomes *Active* and the execution status is set to *Scheduled*.

    > **i Note**
    >
    > *Activate* performs a dual function; it activates the target group and schedules the member determination process. While activation is a one-time activity, the *Activate* remains enabled as long as the target group is in status *In Preparation*.

4. **Deactivate Schedule**: Use this feature to adjust the determination conditions any time during the member determination process. This halts the determination process and the *Execution Status* is set to *Not Started*. However, the determination process cannot be halted if the *Execution Status* is set to *Running*. Finally, click on *Activate Schedule* to resume the determination process.

Maintain Conditions for Extension Fields

It is possible to define conditions for extension fields. However, note that the allowed selection criteria for member determination is the same in both dynamic and manual target group. For example, the set of attributes for which you can define conditions in the target group and the set of search fields on a static target group are same.

PREREQUISITE: The user has access to the Key User Tool authorization.

Follow these steps to define conditions for extension fields:

1. Create an extension field on the customer screen
2. Select an appropriate extension scenario. Note that in order to maintain the conditions for extension fields on the target group, the field must be extended in an appropriate extension scenario.

1. Create an extension field.
2. Save and open the edit screen for the extension field and navigate to the *Extension Scenarios* tab.
3. Select the scenario `Account - General Information to Target Group - Account Selection` and add the extension field to this scenario.

3. Add the extension field to the Customer screen. You have created the extension field and now need to add this to the customer screen. To do this, in the *Additional Fields* dialog screen, select the checkbox and click on *Apply*.

4. Follow these steps to add the extension field to the search screen of static target group:
   1. Open a static target group (where the member determination is not configured).
   2. In the *Members* tab, click on *Add Accounts* under the *Add*.
   3. Add the extension field that you created for the account.

   > i Note
   >
   > If the extension field is not added to the search dialog, then the member determination will not work for the created extension fields.

5. **Add the extension field to the conditions table**: Open the dynamic target group where you want to maintain conditions for the extension fields. In the *Account Condition* table, select and choose *Apply* to add the extension field.

> i Note
>
> The process of configuring conditions for extension fields is similar as described above for other member types (Contacts and Individual Customers).

3.2.15 Customer Groups

Customer groups within an organizational unit.

You can specify the customer groups to which an account belongs. You can maintain the customer group for each organizational assignment in the sales data of the account master record.

Use customer groups for internal and external collaboration. In the *Groups* tab under *Accounts*, create public, private or external groups within an account to enable collaboration, to share data and other information. You can use the in-built integration with SAP Jam to enable collaboration within the groups.

3.2.15.1 Configure Customer Groups

Administrators can configure customer groups under ▌▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▌▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Accounts* ❯ *Maintain Customer Groups* ❯.

3.2.16 Identifiers

Assign additional identifiers when creating accounts and individual customers and trigger a duplicate check using the identifier. Bi-directional replication of these identifiers between SAP Cloud for Customer and SAP ERP / SAP S/4HANA is also possible.

3.2.16.1 Configure Custom Identifiers

Administrators can configure custom identifiers for accounts and individual customers and use them in a host of functions. The new tab *Identifiers* displays the identifiers you maintain for an account or individual customer.

Configure identification types under ▎▶ *Business Configuration* ❭ *Implementation Projects* ▐. Select your project and navigate to ▎▶ *Open Activity List* ❭ *General Business Partners* ❭ *Maintain Identification Types* ▐.

3.2.17 Competitor and Competitor Product

Add *Competitor* and *Competitor Product* information in accounts instead of checking a list of past opportunities.

As a sales representative, you can use this information to plan your activities. Your administrator can enable this feature via adaptation.

> **i Note**
>
> Ensure that the *Competitor Products* are maintained for the *Competitor* to show them in accounts.
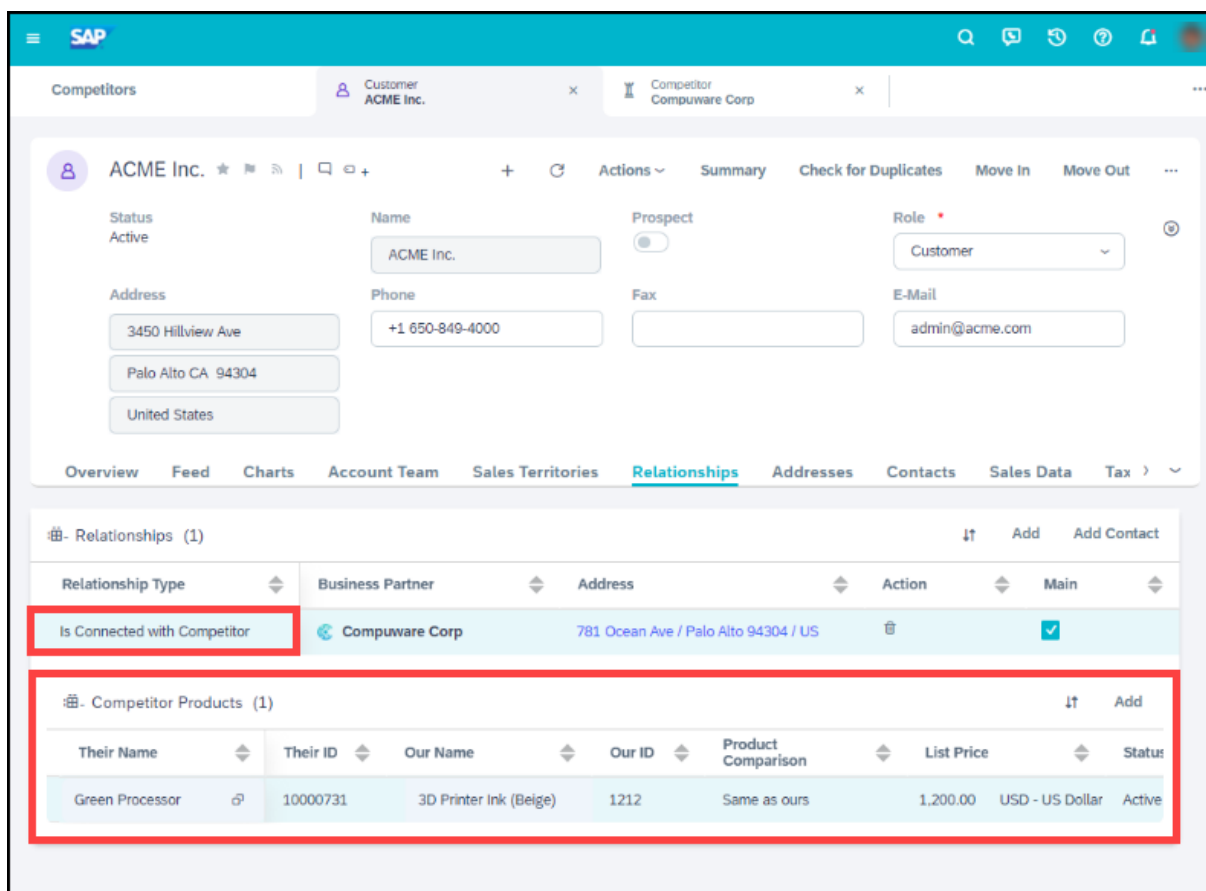
3.3 Account Duplicate Check

Validation for duplicate records for accounts.

Multiple duplicate records for the same customer may lead to inconsistencies in the system. On triggering a duplicate check, the system identifies a master record and duplicate records (if any) for an account. You can then initiate an account merge between the master and duplicate records. As part of merge, the master record is retained and duplicate records are set to obsolete status and a relationship of 'replaces' and 'Is replaced by' is created between the master and duplicate records respectively. Duplicate check allows you to:

- Configure a duplication check.
- Assign weightage to each parameters.
- Determine system recommended duplicates during account creation.
- View and use the similarity scores for each duplicate record.

Use action *Check for Duplicates* in the toolbar for *Customers* to initiate a duplicate check for existing accounts, individual customers, and contacts. When you check for duplicates, the system displays a list of potential duplicate records. Select a maximum of two records from the list, and click *Merge* to trigger a merge process.

You can also trigger a duplicate check when creating new accounts, customers, or contacts.

3.3.1 Identifiers

Assign additional identifiers when creating accounts and individual customers and trigger a duplicate check using the identifier. Bi-directional replication of these identifiers between SAP Cloud for Customer and SAP ERP / SAP S/4HANA is also possible.

3.3.2 Configure Duplicate Check

Administrators can configure duplicate check by maintaining weightages of parameters for the business partners.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* 〉. Select your project and navigate to ▶ *Open Activity List* 〉 *Fine-Tune* 〉 *Duplicate Check Weighting for Business Partners* 〉.

Additionally, you can scope **one** the following questions under ▶ *Business Configuration* 〉 *Implementation Projects* 〉. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *General Business Data* 〉 *Business Partners* 〉 *Handling of Business Partners* 〉:

- Do you want to apply a strong check for duplicate business partners?
- Do you want to apply a medium check for duplicate business partners?
- Do you want to apply a weak check for duplicate business partners?
- Do you want to disable the duplicate check for business partners?
- Do you want to include obsolete business partners in the duplicate check?

3.3.3 Configure Duplicate Check to Include Obsolete Accounts

Administrators can configure duplicate check to include obsolete accounts. With this configuration, the duplicate check will fetch all obsolete accounts along with the active accounts.

Use this feature to re-activate obsolete customers and avoid re-creating new duplicate customers.

Administrators must configure this feature under ▶ *Business Configuration* 〉 *Implementation Projects* 〉. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *General Business Data* 〉 *Handling of Business Partners* 〉 and select the scoping question: *Do you want to include obsolete business partners in the duplicate check?*

3.3.4 Calculate and Identify Duplicates Using Custom Logic

You can now call custom logic to calculate duplicates for accounts and individual customers.

Implement `CheckForDuplicateAccounts` (Name: **PDI BADI DUPLICATE CHECK FOR ACCOUNTS**) Business Add-In (BAdI) in the SAP Cloud Application Studio to add the custom logic.

> **i Note**
>
> Prior to this release, a similar BAdI was available for contacts.

3.4 Customer Merge

Customer merge function is available for corporate accounts, individual customers and contacts. This feature allows master data teams to merge duplicate records into a single golden record.

Customer merge helps you to:

- Manage multiple duplicate records for the same customer that may result in inconsistencies in the system.
- Create a golden master record from duplicate records for a single account.
- Re-assign open transactions and closed transactions related to the duplicate record to the golden record (in case there are any open leads or opportunities.

3.4.1 Rules for Transaction Reassignment During Merge

During customer merge, system also reassigns transactions for the accounts. The rules determined for transasction reassignment are listed here.

Transaction Reassignment in Account Merge

Transactions	Description
Tickets	All the tickets where duplicate account is an involved party should be reparented to the master account .Tickets which could not be re-parented (because of status or due to any other technical reason) to master should be logged in the Merge BO with appropriated error log entry in the application log so that the user can evaluate the issue
Sales Orders	All the Order where duplicate account is an involved party should be re-parented to the master account .Orders which could not be re-parented (because of status or due to any other technical reason) to master should be logged in the Merge BO with appropriated error log entry in the application log so that the user can evaluate the issue

Transactions	Description
Leads	All the leads where duplicate account is an involved party should be re-parented (because of status or due to any other technical reason) to the master account .leads which could not be re-parented to master should be logged in the Merge BO with appropriated error log entry in the application log so that the user can evaluate the issue
Activities (Phone Call, Appointments, Tasks and Emails.	All activities where duplicate account is an involved party should be re-parented (because of status or due to any other technical reason)to the master account .appointments which could not be re-parented to master should be logged in the Merge BO with appropriated error log entry in the application log so that the user can evaluate the issue
Social Media Messages	All social media messages attached to social profile of duplicate record will also move from duplicate Record to Master post Merge
Visits	All the visits where duplicate account is an involved party should be reparented (because of status or due to any other technical reason) to the master account .Visits which could not be reparented to master should
Opportunities	All the opportunities where duplicate account is an involved party should be reparented (because of status or due to any other technical reason) to the master account .Opportunities which could not be reparented to master should be logged in the Merge BO with appropriated error log entry in the application log so that the user can evaluate the issue
Sales Quotes	All the sales quotes where duplicate account is an involved party should be reparented (because of status or due to any other technical reason) to the master account .Quotes which could not be reparented to master should be logged in the Merge business object with appropriated error log entry in the application log so that you can evaluate the issue

3.4.2 Merge Criteria for Tab Screens

Find detailed information on the criteria that needs to be fulfilled for merging tabs account details displayed in the respective tabs in the UI.

Node Handling during Merge

Nodes	Description
Relationships	- The system will merge the account team and relationship records from the duplicate account into master account. - If a relationship is marked as unique and exists in the master record, the system will ignore the same record in duplicate records. For unique relationships master account will always take precedence. - All non-unique relationships will be copied over from duplicate reccord to the master record. - All relationships copied from duplicate to master will be deleted from the duplicate record. - A new relationship 'Is Replaced' /'Replaces' will be created between golden and duplicate record.
Territory	- When tenant is configured to have Single territory per account, territory maintained on the duplicate account shall not be copied to master. Territory on the master will remain as is; territory maintained on the duplicate account will not be copied. - When tenant is configured to have multiple territory per account, all territories assigned to duplicate account will be merged into the dedicated sales territory section of the master account. All territories assigned to duplicate account will be merged into the dedicated sales territory section of the master account. System determined sales territories of the master record will not be modified. The newly merged account (master account) will also have all of the territories of the duplicate account.

Nodes	Description
Address	- All addresses of the duplicate account will be copied over to the master account. This can be deactivated via Custom Extension, see below - The main address in the master account will remain the main address post merge. - Any selections of address data made on the Attribute Selection tab will be applied to the main address. - In case no address information is maintained in the master record, the main address of the duplicate account will be marked as the main address in the master account post merge.
Notes	The Notes added to duplicate Account will be copied over to Master.
Attachments	All attachments from the duplicate account will be copied over to the master account.
Account Team	The system will merge the account team and relationship records from the duplicate account into master account. If a party role in unique and exists in the master record, the system will ignore the same party role from the duplicate record. For unique party roles master account will always take precedence. Uniqueness check for a party role in account team will consider the sales area and the validity dates check. For example, an account can have 2 owners with the same sales area information but with different validity dates. Though owner is a unique role, the uniqueness check will also consider the sales area and validity dates.
Sales Area	All sales area information from the duplicate will be copied over to the master account. If the sales area (Sales org, distribution channel, division) information of the master account also exist in the duplicate account, then the sales area record will not be overwritten, the sales area details maintained for the master record will take precedence.

Nodes	Description
Social Profiles	If both master and duplicate record have social profile , then copy the social profile from duplicate to master EXAMPLE: • Customer A (Master) has FB Social profile assigned FB_1. • Customer B (duplicate) has Twitter Social profile assigned TW_1 • After the merge A will have a new user profile TW_1. • Social profile linked with customer A will have two User profiles one for FB, and one for TW. • If master record does not have a social profile then the social profile from duplicate will be copied to master record
Marketing Permissions	In general the final result after account merge will be a union of values from all the accounts. In case of conflict the master account wins. • **Case 1:** When all accounts have different marketing permissions assigned for different channels -The master account will have a union of all . • **Case 2** : In case of conflict , the permission value maintained in master account will be retained. The system will also copy notes and attachments
Communication Category	In general the final result after account merge will be a union of values from all the accounts. In case of conflict the master account wins. • **Case 1**: When all accounts have different assignments for different channels -The master account will have a union of all . • **Case 2** : In case of conflict , the permission value maintained in master account will be retained

Nodes	Description
Marketing Attributes	In general the final result after account merge will be a union of values from all the accounts. In case of conflict the master account wins. • **Case 1:** When all accounts have different marketing attributes assigned The resultant account will have a union of all the marketing attributes • **Case 2**: When marketing attributes allows multiple values, there are common marketing attributes but different/common values. The master account will have a union of values. • **Case 3** : In case of conflict , the attribute value maintained in master account will be retained

3.4.3 Status Management in Account Merge

Accounts assume various statuses during customer merge. Find detailed information on these statuses in this topic.

Statuses and Descriptions

Status	Description
Not Started	This is the initial status and is set when the Merge object is created and Merge process has not yet been triggered.
Merge In Process	This is the status when the merge has been triggered either from the web service call or manually from the UI. This status indicates that merge process has started.
Merge Failed	This is the status when the merge operation of merging source and replica record has failed. The system will not attempt any transaction reassignment in case the merging of duplicate records has failed.
Merge Completed - Realignment In Process	This is the status when the merge of two customers has been successfully completed and the re-parenting of transactions assigned to the duplicate record to source record has started.
Merge Completed - Realignment Failed	This is the status when the merge of two customers has been completed and the reassignment of transactions has failed.

Status	Description
Realignment Completed – Enhanced Realignment In Process	This is the status when the merge of two customers has been successfully completed and the enhanced re-parenting of transactions assigned to the duplicate record to source record has started (only available if 'Realignment of Closed Transactions of Merged Records' is configured – see below).
Realignment Completed – Enhanced Realignment Failed	This is the status when the merge of two customers has been completed and the enhanced reassignment of transactions has failed (only available if 'Realignment of Closed Transactions of Merged Records' is configured – see below).
Completed	This status signifies that customer merge and reassignment of transactions has been completed without any errors.

3.4.4 View Result Log

The *Result Log* screen displays the application logs that are created by the system for each merge transaction.

The logs are displayed in a hierarchy. Click on the hyperlinked *Application Log ID* to see if the merge execution resulted in errors, warnings or other information messages.

The Results section of the application log also displays for the errors, the reason why the transaction reassignment failed. Re-trigger the merge using the *Initiate* action available on the customer merge list view.

3.4.5 Fix Issues with Incorrect Master Data of Duplicate or Obsolete Records

Fix issues with errors in master data in the duplicate or obsolete business partner records. For example multiple contracts appear with spelling errors in account name.

1. From Customer Merge, nominate one business partner as the *Master*.

   > i Note
   >
   > Prospects cannot be nominated.

2. Define the properties of the other duplicate business partners that should be used by the *Master*.
3. Initiate the merge.

> i Note
>
> View business partner merge details in the business object *Changes* tab.

> i Note
>
> View Business Partner merge for an *account* in the *Relationships* tab of the revised (duplicate) *account*.

3.4.6 Enable Customer Merge

Administrators can enable customer merge for accounts and contacts.

Go to ▐▶ *Business Configuration* ❯ *Implementation Projects* ▌. Select your project and navigate to ▐▶ *Edit Project Scope* ❯ *Questions* ❯ *General Business Data* ❯ *Business Partners* ❯ *Handling of Business Partners* ▌ and select the scoping question: *Do you want to enable accounts merge?*

> **i Note**
>
> SAP does not recommend configuring customer merge if your customer master records are replicated with an external system (that is SAP ERP and SAP CRM integration is scoped). This is because a merge execution does not trigger a corresponding replication in the external system which may give rise to data inconsistency.

In order to initiate merge, you must have the *Data Cleansing* work center view assigned to user. In this work center view, click on *New* to trigger a manual merge. You can select a maximum of three customer records - one master and two duplicate records to be merged. Note that this action can be initiated only if the merge object is in one of the following statuses:

- Not Started
- Merge Failed
- Merge Completed
- Realignment Failed

For detailed troubleshooting information for customer merge, see the section - **Customer Merge FAQs**.

Related Information

Merging Marketing Permissions [page 212]

3.4.6.1 Configure Realignment of Closed Transactions of Merged Records

By default, the account merge fetches all open transactions of merged or obsolete records. If you need to also fetch closed transactions, you must maintain the required configuration.

Administrators can maintain the configuration to include or exclude closed transactions of obsolete records in account merge.

To enable this feature, go to ▐▶ *Business Configuration* ❯ *Implementation Projects* ▌. Select your project and navigate to ▐▶ *Edit Project Scope* ❯ *Questions* ❯ *General Business Data* ❯ *Business Partners* ❯ *Handling of Business Partners* ❯ *Business Partner Merge* ▌ and select the scoping question: *Do you want to enable enhanced document realignment during account merge?*

3.4.6.2 Map Obsolete Records to Primary Record For More Insights

Use insights from closed transaction history of obsolete records event without including closed transaction history in account merge. This way you can leverage reporting to show complete picture of primary account.

The new datasource - *Account Merge Master Link* allows you to map primary record to obsolete records and thus allows closed transaction history to be reported along with all other activities of primary record.

3.4.6.3 Differentiate Between Standard Change and Merge Context

Administrators can now differentiate between updates to an account triggered by merge or by standard change process. This differentiation can be implemented using custom logic such that the custom logic is executed only for change instances occuring due to merge.

Use business partner utility - `AP.FO.BusinessPartner.Globalnamespace BusinessPartnerUtilities.IsBusinessPartnerMerge`o implement this custom logic. This utility is provided for the standard Business Partner business object provided by SAP and is available in SAP reuse library.

Extension Fields

The Customer Merge includes extension fields. Extension fields at the 'General' and 'Address' (only for the main address of accounts and individual customers) segment of the customer will be offered on the Attribute selection tab in the Customer Merge UI if their content differs between the involved records. They will be treated exactly like non extension fields. The content of all extension fields not of the 'General' segment will be moved to the master whenever their node is moved.

3.4.6.4 Extension Fields

Customer merge feature includes extension fields.

Extension fields at the *General* and *Address* (only for the main address of accounts and individual customers) segment of the customer will be offered on the *Attribute* selection tab in the customer merge UI if their content differs between the involved records. They will be treated exactly like non extension fields.

> **i Note**
>
> The content of all extension fields not of the *General* segment will be moved to the master whenever their node is moved.

3.4.6.5 Merging Marketing Permissions

When you're merging corporate accounts, individual customers or contacts, the system also merges the related marketing permissions. But there are things to keep in mind to interpret the merged data correctly afterwards.

The following table shows you which permission is taken depending on the permissions given in the leading or subordinate contact or individual customer:

Leading Instance	Subordinate Instance	Merged Instance (now leading)	Last Modified Timestamp
Undefined	Undefined	Undefined	No change
Undefined	Opt-In	Opt-In	Changed – *Last Modified* timestamp updated with the date and time when the merge happened.
Undefined	Opt-Out	Opt-Out	Changed – *Last Modified* timestamp updated with the date and time when the merge happened.
Opt-In	Undefined	Opt-In	No change
Opt-In	Opt-In	Opt-In	No change
Opt-In	Opt-Out	Opt-Out	Changed – *Last Modified* timestamp updated with the date and time when the merge happened.
Opt-Out	Undefined	Opt-Out	No change
Opt-Out	Opt-In	Opt-Out	No change
Opt-Out	Opt-Out	Opt-Out	No change

> **i Note**
> - The *Last Modified* timestamp reflects only the time point of the last change and doesn't reflect the date when the consent was given by the customer.
> - Opt-out is always taken, even though the opt-in is more recent.
> - The system merges also notes and attachments. The merged notes are separated with a comma.

For more information about customer merge, see Enable Customer Merge [page 210].

3.4.7 Custom Extensions to Customer Merge Using BAdI

An SAP Cloud Application Studio enabled business add-in - `ControlCustomerMerge` with method CONTROL_MERGE_LOGIC is provided for custom extensions to the customer merge feature.

The method CONTROL_MERGE_LOGIC is included in the enhancement option - CustomerMergeControl. Itincludes the following import and export parameters:

- Import Parameter: InputData of type BadiCustomerMergeControlInput
- Export Parameter: BadiCustomerMergeControlResult

This method can be implemented to control the following:

- If addresses of the duplicate records must not be copied to the master record during Phase 1 of the business partner merge.

```
import AP.FO.BusinessPartner.Global;
var result : BadiCustomerMergeControlResult;
result.SkipAddressCopyToMaster = true;
return result;
```

- If the contact person relationship must be retained with the duplicate record during phase 1 of the business partner merge.
import AP.FO.BusinessPartner.Global; var result : BadiCustomerMergeControlResult; result.KeeepContactPersonRelationshipToNonMaster = true; result.SkipAddressCopyToMaster = true; return result;

> ᠊ᗒ Sample Code

3.5 Maintain Address and Use Maps and Geo-Tracking

Geo-tracking using address validation and address maintenance.

The address data format is supported for most internationally accepted formats. Use maps and geo-tracking using address validation to view and track accounts for sales transactions such as visits.

International Address Versions [page 213]
Support for address maintenance in internationally accepted formats.

Map View for Accounts [page 216]
Track location of accounts using maps.

Address Validation [page 217]
Geo-coding for addresses.

Address Type Ahead Search [page 221]

3.5.1 International Address Versions

Support for address maintenance in internationally accepted formats.

In the SAP Cloud for Customer standard system you can maintain addresses of customers in different scripts like Arabic or Simplified Chinese along with Latin characters (Latin characters are used in international system). You maintain address in the *Address* tab under *Customers*. Click on the **Edit** icon under *Action* in the *Addresses* table to maintain address data.

> **i Note**
>
> It is strongly recommended to use Latin as the default script. To use address versions that are not linked to any scripts, use the address version - *Any*. This enables you to use any scripts in your system. Also use this code to map and replicate address versions in SAP ERP, that are not linked to standard language scripts.
>
> **Example**: To use this code, set the relevant local language or the chosen company language as the version indicator *Any* and use it as the default address version.

Facts About Address Maintenance

- The address version is independent of the logon language (and vice-versa). The default character version maintained in the business configuration is displayed in the customers.
- The international address is replicated to the on-premise systems as part of standard customer replication from SAP Cloud for Customer.
- The international address version is derived (subject to conditions) for print forms.

Facts About Integration with On-Premise System

Address Version Configuration Cloud for Customer and On-Premise

Cloud for Customer	On-Premise
Default as well as alternative versions to be configured	Defaulted by system to *International*; Only alternative versions need to be configured. > **i Note** > > In the on-premise system, the value *International* corresponds to *Latin* in the cloud for customer system. This is because Latin characters are default for an international system.

3.5.1.1 Configure International Address Versioning

Administrators can configure International Address Versioning for language maintenance.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❘. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *International Address Versions* ❘ and select all the languages in the list for which you need to maintain address data. The activated scripts (for languages corresponding to the address versions) can be used to maintain master data such as business partner name and address.

> **i Note**
>
> You must also specify a default address version that will initially be displayed and that must be maintained for every record. After the creation of name or address data for a non-default address version you cannot change the default address version again.

Additionally, you can configure the feature under ▌▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▌▶ *Edit Project Scope* ❭ *Questions* ❭ *Built-in Services and Support* ❭ *Business Environment* ❭ *Addresses and Languages* ❭ *International Address Versions* ❭ and select the scoping question: **Do you want to specify textual master data using international address versions?**

3.5.1.2   Enable Address Check

Administrators can configure address check that validates addresses maintained in master data for business partners and organizational units, during migration and data replication.

To enable address check, go to ▌▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▌▶ *Open Activity List* ❭ *Address Checks* ❭. The system checks if address data, such as country/region, and postal code length, is consistent. Inconsistent data leads to error messages and cannot be saved or activated.

To disable the address check, select the *Allow Saving of Inconsistent Addresses* checkbox. If you select the checkbox below, you allow the saving of inconsistent addresses for master data. The check results will then be shown as warnings, and the data will be saved.

> **i Note**
>
> Checks of address data for business documents are not affected.

3.5.1.3   Turn Off Country/Region Specific Formatting for Phone Numbers

Administrators can turn off the country/region specific formatting for phone numbers to avoid issues during replication of business partner addresses.

To maintain the required configuration, go to ▌▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▌▶ *Edit Project Scope* ❭ *Questions* ❭ *Built in Services and Support* ❭ *Business Environment* ❭ *Address and Languages* ❭ and select the scoping question: *Do you want to suppress the defaulting of the country dialing code for phone numbers without country dialing code?*

Country/region specific formatting ensures that if the recommended format for a phone (or mobile) number isn't maintained and the dialing code isn't available, then system determines the dialing code from the postal address. However, during migration or replication, if inbound phone numbers do have the dialing code but are prefixed '00' instead of the superior leading '+', this may result in problems with migration. Use the scoping question to suppress country/region formatting for such business needs.

> **i Note**
>
> The recommended format to maintain a phone or mobile number is to start with a leading '+' followed by the dialing code, for example, '+49 (6227) 7-47474'.

3.5.2 Map View for Accounts

Track location of accounts using maps.

Under ▌▶ *Customers* ❯ *Accounts* ▐ and ▌▶ *Visits* ❯ *Visit Planner* ▐, choose *Map View* to see the geographical location of each of the addresses of the displayed accounts — both individually, and in relation to one another. You can also zoom in, zoom out, and pan in any direction.

> **i Note**
>
> In autonavi maps for accounts, pin color on the maps is determined using account role (customers and prospects). Use this to identify and differentiate between customers and prospects in the map. Only two account roles - Customer and Prospect are shown in colors. All other roles are represented using the default pin color - blue.

> **i Note**
>
> You can keep only one set of map active in the system. You can configure each map individually, or configure a combination of Google and AutoNavi map. In the former case, the system will display only the configured map. In the latter case, a toggle button will be available for you to switch to the map of your choice. Note that you cannot combine a Bing Map with any other map. If both maps are active by accident, mapping functionality in the HTML5 or the Fiori client, may not function properly.

Search Nearby or Search Map Area

Search for accounts or individual customers located nearby or within a map area. You can therefore search within a map using the following options:

- *Search Map Area* - Within a selected map area, triggers a search for and pins on the map, all customers that match search criteria.
- *Search Nearby* - Pins your current map location and triggers a search for customers nearby that match search criteria.

> **i Note**
>
> The *Search Nearby* and *Search Map Area* features work only for the accounts that are mapped using geo-coordinate addresses (latitude and longitude). These features are not available for accounts that utilize only address information (without geo-coordinates).

> **i** Note
>
> An example for the format for latitude and longitude is given as follows: Latitude: **49,293393** and - **Within a selected map area,Longitude: 8,641981**.

3.5.2.1 Configure Maps

Administrators can configure Google Maps or AutoNavi Maps for different accounts.

To enable map view, you must configure mashup. Proceed as follows:

1. Choose ▶ *Administrator* ❯ *Mashup Authoring* ❯ *.* ▶
2. On the *Mashup Authoring* screen, select *Custom Mashups* from the dropdown menu.
3. Perform a search for the mashup ID. The mashup IDs for the available maps are as follows:
   - Google - `SM00078`
   - AutoNavi - `SM00079`: For use in the countries/regions such as China where Google Maps aren't supported.
4. Select the mashup and click *Enter API Keys*. The *Enter API Keys* dialog box opens.
5. Click *Show API Key* and, in the *API Key Value* column, enter the API key that you received from the service provider.
6. Save your changes.

> **i** Note
>
> - The use of the Google Maps Service is subject to Google Terms of Service, which are written in http:// www.google.com/intl/en/policies/terms/ ↗ . If you don't accept such Terms of Service, including but not limited to all limitations and restrictions therein, you may not be able to use Google Maps Service in SAP Cloud for Customer. The use of Google Maps Service in or through SAP Cloud for Customer constitutes your acceptance of Google Terms of Service, and it can be terminated by SAP without reason at any time and SAP is not required to provide an equivalent service via another provider.
> As a prerequisite, please create a support ticket to obtain and use the SAP API key for Google Maps.
> - The use of AutoNavi Maps Service is subject to AutoNavi Terms of Service, which are written in http:// map.amap.com/doc/serviceitem.html ↗ . If you do not accept such Terms of Service, including but not limited to all limitations and restrictions therein, you may not be able to use AutoNavi Maps Service in SAP Cloud for Customer. The use of AutoNavi Maps Service in or through SAP Cloud for Customer constitutes your acceptance of AutoNavi Terms of Service, and it can be terminated by SAP without reason at any time and SAP is not required to provide an equivalent service via another provider.
> As a prerequisite, please create a support ticket to obtain and use the SAP API key for AutoNavi Maps.

3.5.3 Address Validation

Geo-coding for addresses.

Address checks determine if address data such as country, region and postal code length is consistent. If you enter inconsistent data, appropriate error message is displayed and you cannot save or activate the address data.

Address validation services help validate, normalize, and geo-code addresses maintained for accounts and individual customers. These services are licensed separately by SAP Data Quality Management (SAP DQM) micro service that is hosted on SAP Cloud Platform. Implement this http based microservice) also called Data Quality as a Service, to integrate address validation feature within your SAP Cloud for Customer system.

Use

> **i Note**
>
> Before implementing address validation service, you need to be aware of DQM billing for the API calls from SAP Cloud for Customer . See the section **Billing for DQM Service for Address Validation** further below in this topic.

You can validate addresses for accounts and individual customers in the following screens:

1. **Account / Individual Customers Quick Create Screen**: When you click *Validate Address* in the quick create screen, the service displays a dialog with both the original as well as the proposed addresses. You can choose to accept the proposal or further refine the address. The service also performs a duplicate address check for the proposed address.
2. In the account *Overview* tab, use the actions menu to validate address data maintained in the account header.
3. In the *Address* tab, select an address and click *Validate Address* icon in the table.

3.5.3.1 Configure Address Validation for Geo Tracking

Administrators can configure address validation for geo tracking using standard microservices from SAP Cloud Platform.

Prerequisite

When you purchase a license for the microservice, you are assigned a **Request URL** to access SAP DQM micro services. The URL is unique to your data center on SAP Cloud Platform and is required to activate integration with the SAP Cloud for Customer. You can access this URL under ▌▶ *SCP Cockpit* ❭ *Services* ❭ *Data Quality Services* ❭ *Application URL* ▌. Copy this URL to a notepad on your local machine. You assign this URL when configuring the integration in your cloud for customer system.

Steps for Configuring Microservice for Address Validation in SAP Cloud for Customer

1. Go to ▶ *Business Configuration* ▶ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Built in Services and Support* ▶ *Business Environment* ▶ *Addresses and Languages* ▶ and select the scoping question: *Do you want to use the Address Validation service?*
2. Create a communication system with name **Address Validation** (recommended name) under ▶ *Administrator* ▶ *General Settings* ▶ *Integration* ▶ *Communication Systems* ▶. Further, under *Host Name*, enter the request URL.

> **i Note**
>
> Request URL is the Application URL that you have copied under Data Quality Services in SAP Cloud Platform. **Enter the URL without leading Https:// and without trailing /dq/AddressCleanse (as shown in the graphic below).**

3. Next, create a new communication arrangement under ▮▶ *Administrator* ❯ *General Settings* ❯ *Integration* ❯ *Communication Arrangements* ❯. Create the communication arrangement with the same name as the communication system you created in the previous step.

Enter the following settings for the communication arrangement:

○ **Application Protocol: Http**

○ **Authentication Method: SSL Client Certificate**

○ **Certificate – SAP Business ByDesign System**

> **i Note**
>
> Download this certificate to your local machine. Upload this certificate to SAP Cloud Platform.

○ **Host Name: the request url you maintained in the communication system is defaulted here**

Create a new communication scenario and assign the new communication arrangement to the new communication scenario.

Configuration in SAP Cloud Platform

Upload the client certificate (that you have assigned to communication arrangement in Cloud for Customer and downloaded to your local machine) to SAP Cloud Platform. For detailed documentation on importing client certificate to SAP Cloud Platform and configuring client certificate authorization, see Client Certificate Authorization.

Billing for DQM Service for Address Validation

The street address validation along with geo coding is enabled by default for each SAP Cloud for Customer to SAP DQM micro service call. The following considerations apply as part of the address validation service:

● Street address validation and geo coding are considered as two different transactions by DQM service.

● Street and post office box addresses within the same address validation transaction are considered separately.

For detailed information on billing for these API calls, refer to Billing/Usage Information (Per API Call)

Additional Information

For detailed information on enabling and configuring DQM Microservices, see the documentation under Data Quality Management, microservices for location data (DQM microservices).

3.5.4 Address Type Ahead Search

Use type ahead suggestions to select a complete address after typing only a portion of it (minimum of 5 characters). While you are typing, the application sends frequent requests to the microservice, and displays a list of suggestions. Once you select an address from the list, all the address fields are updated automatically.

> ! Restriction
>
> If the *State* address field is not updated as per the latest search, you may need to click on the field to get updated.

These services are licensed separately by SAP Data Quality Management (SAP DQM) micro service that is hosted on SAP Cloud Platform. Implement this http based microservice also called Data Quality Service, to integrate address type ahead search feature within your SAP Cloud for Customer system.

Use

> i Note
>
> Before implementing address type ahead search service, you need to be aware of DQM billing for the API calls from SAP Cloud for Customer . See the section **Billing for DQM Service for Address Type ahead Search** further in this topic.

3.5.4.1 Configure Address Type Ahead Search

Administrators can configure address type ahead search using standard microservices from SAP Cloud Platform.

Prerequisite

When you purchase a license for the microservice, you are assigned a **Request URL** to access SAP DQM micro services. The URL is unique to your data center on SAP Cloud Platform and is required to activate integration with the SAP Cloud for Customer. You can access this URL under ▐▶ *SCP Cockpit* ▶ *Services* ▶ *Data Quality Services* ▶ *Application URL* ▌. Copy *Address Cleanse URL* under *Available endpoints* to a notepad on your local machine. You assign this URL when configuring the integration in your cloud for customer system.

> i Note
>
> Do not use the URL under *Available endpoint when using client certificates*.

Configuration in SAP Cloud Platform

Generate OAuth 2.0 Client IDs and Token Values to configure in SAP Cloud Platform. For detailed documentation on generating OAuth 2.0 certificate to SAP Cloud Platform, see OAuth 2.0 Authorization.

Steps for Configuring Microservice for Address Type Ahead Search in SAP Cloud for Customer

1. Enable the scoping question as follows:
    1. Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ❯.
    2. Select your project and navigate to ▌▶ *Edit Project Scope* ❯ *Questions* ❯ *Built in Services and Support* ❯ *Business Environment* ❯ *Addresses and Languages* ❯.
    3. Select the scoping question: *Do you want to use the address type ahead search functionality?*
2. Configure Mashup Web Services
   There are two mashup web services need to be configured.
    1. *DQM Address Type Ahead* mashup service:
        1. Go to ▌▶ *Administrator* ❯ *Mashup Web Services* ❯.
        2. Select the pre delivered service (SW00095) and *Copy* the template to create new service.

            > **i Note**
            >
            > Under *General Information*, retain the *Service Name* and *Description* as it is.

        3. Under *Service Information*, update the necessary fields as:
            ○ *Authorization Method*: OAuth

- ○ *HTTP Method*: Post
- ○ *URL*: Maintain the Token Endpoint URL that is provided in OAuth settings from SAP Cloud Platform.
- ○ Enter the *Consumer Key* and *Consumer Secret* that you have created during OAuth settings.

> **i Note**
>
> Ensure that you retain the other fields as it is.

4. Click *Save* and *Activate*.

2. *DQM Address Type Ahead Endpoint* mashup service:

1. Go to ▌ *Administrator* ⟩ *Mashup Web Services* ▌.
2. Select the pre delivered service (SW00094) and *Copy* the template to create new service.

> **i Note**
>
> Under *General Information*, retain the *Service Name* and *Description* as it is.

3. Under *Service Information*, update the necessary fields:
   - ○ *Authorization Method*: OAuth
   - ○ *HTTP Method*: Post
   - ○ *URL*: Maintain the *Address Cleanse URL* from *Available endpoints* list in SAP Cloud Platform.

> **i Note**
>
> - ○ Do not use the URL from *Available endpoints* when using client certificates list in SAP Cloud Platform.
> - ○ Ensure that you retain the other fields as it is.

4. Click *Save* and *Activate*.

> **i Note**
>
> Maintain only one mashup for Token and Service. Multiple mashups for the same will create inconsistency.

Billing for DQM Service for Address Type Ahead Search

The street address type ahead search is enabled by scoping question for each SAP Cloud for Customer to SAP DQM micro service call. The following considerations apply as part of the address type ahead search service:

- Street address type ahead search is considered as two different transactions by DQM service.
- Street and post office box addresses within the same address type ahead search transaction are considered separately.

For detailed information on billing for these API calls, refer to Billing/Usage Information (Per API Call).

Additional Information

For detailed information on enabling and configuring DQM Microservices, see the documentation under Data Quality Management, microservices for location data (DQM microservices).

3.6   Organization and Territory Assignments

Alignment to org. units helps to cluster accounts within your sales organization. Further, use territories to further distribute accounts within specific sales territories.

Sales data maintenance for accounts.

Enable sales analysis based on sales territories.

3.6.1 Account Sales Data

Sales data maintenance for accounts.

Accounts are often used within the purview of an org. structure. Therefore, create the necessary sales data required for accounts within the org. structure of your company. Use territories, distribution channels and divisions for accounts.

- Assign one or more sales organizations, distribution channels and divisions to an account.
- Use the sales area assignment to determine sales data in business transactions.
- Configure access restrictions based on sales area.

Sales Arrangement Data: In addition to the sales data, assign attributes for to an account, attributes for sales arrangement in the account quick create dialog screen. SAP ERP offers sales arrangement data as mandatory for account creation. This feature in your cloud solution allows for a seamless replication of account details to your SAP ERP system. Also, since sales arrangement data is available during account creation, this data is available for you to manage account restrictions too.

3.6.1.1   Configure Sales Data

Administrators can configure account sales data that includes distribution channel, division, sales area territory hierarchy level, price lists and price groups.

Administrators can configure account sales data.

Sales Area Distribution Channel

Go to ▸ *Business Configuration* ❯ *Implementation Projects* ◣. Select your project and navigate to ▸ *Open Activity List* ❯ *Fine-Tune* ❯ *Distribution Channel* ◣ to maintain distribution channels for your company. Additionally, assign the distribution channel to the org. structure for your company using the work distribution maintenance.

Division

Go to ▸ *Business Configuration* ❯ *Implementation Projects* ◣. Select your project and navigate to ▸ *Open Activity List* ❯ *Fine-Tune* ❯ *Division* ◣ to define divisions in your company.

Sales Area Territory Hierarchy Level

Go to ▸ *Business Configuration* ❯ *Implementation Projects* ◣. Select your project and navigate to ▸ *Open Activity List* ❯ *Fine-Tune* ❯ *Sales Territory Hierarchy Level* ◣ to create the root sales territory and other territory levels.

Related Information

For more information, see Configuring Divisions.

3.6.1.2 Configure Workflows to Notify on Changes to Sales Data

Administrators can use the new workflow object for *Sales Data* to trigger workflows when modifications are done to sales data of an account. For example, an account is assigned to a new sales area and you need to inform users about this change. Create workflow rule to trigger a notification or send an e-mail to the account owner or the territory team.

3.6.1.3 Sales Areas Marked for Deletion

If a sales area from SAP ERP is set as *Marked for Deletion* and the same sales area is assigned to a transaction in SAP Cloud for Customer, then the system displays a warning message to that effect.

3.6.1.4 Restrict Sales Data Maintenance for Account and Employee Records

Restrict sales data maintenance for accounts and employees using divisions. The field *Distribution Channel* has been changed to *Sales Data Restriction*.

The tab *Distribution Channel* is renamed to *Sales Data Restriction*. The tab is only visible for org. units with the Sales Organization function.

If values are entered in the *Distribution Channel* field, the system restricts the assignment of a distribution channel and division to the sales organization in the sales data of an account or employee.

> i Note
>
> You can still modify sales data in transactions.

> i Note
>
> In the past release, only the *Distribution Channel* was supported.

3.6.1.5 Restrict Sales Data Maintenance for Sales Organizations

Maintain sales data restrictions for your sales organization by restricting division and distribution channel values. If the restrictions are maintained, the applicable to customer and employee sales data maintenance.

3.6.2 Territories for Accounts

Enable sales analysis based on sales territories.

Following possibilities exist to define accounts based on territories:

- Assign accounts to sales territories to define responsibilities and grant authorizations.
- Assign an account to more than one sales territory.
- Realign territory structure to adjust to changing sales markets.
- Maintain rules based on account attributes for rule based determination of territory in accounts and in business documents such as leads and opportunities.
- Analyze sales on territory dimension.

3.6.2.1 Configure Territory Based Determination

Administrators can assign territory and create rules for territory based determination.

Go to ▶ *Administrator* ⟩ *Sales and Campaign Settings* ▶, you can select:

- *Territories* to define new territories and assign accounts to them.
- *Define Rules for Territories Realignment* to define new rules for a realignment run
- *Realignment Run* to define schedule a realignment run and even define new rules for territory based alignment for accounts.

3.6.2.2   Configure Sales Territory Hierarchy Level

Administrators can configure territory hierarchy levels.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Territory Hierarchy Level* ❯ to maintain territory hierarchy levels.

3.7   Search Accounts

Account and *Individual Customer* dataset queries are available on Value helps.

Your administrator can enable this feature via adaptation.
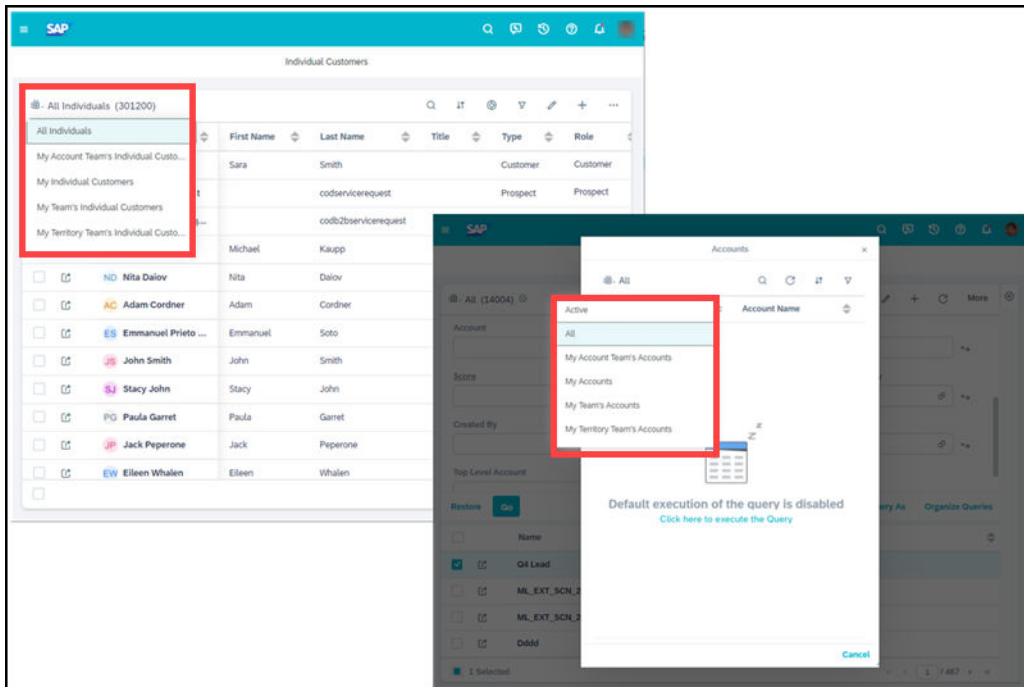
3.8 Embed Direct Links to Object Instances of Customers

Embed direct links to instances of accounts, contacts or individual customers in workflow e-mail templates to enable users to directly access the object instead of navigating in the system.

For detailed information on the feature, see Predetermining URLs for Direct Navigation.

3.9 SAP ERP Customer Cockpit

The customer cockpit is a central point of information for sales-relevant data about a customer, such as address and communication data, key figures, and contact persons.

If your cloud system is integrated with SAP ERP system, you can launch the ERP cockpit (*Accounts* 〉 *Sales Data* 〉 *ERP Cockpit*) directly from an account sales area view and edit transactions in ERP.

3.9.1 Configure SAP ERP Customer Cockpit

Administrators can configure SAP ERP customer cockpit.

Perform the following steps to configure the customer cockpit:

1. Search for ERP Account cockpit - *SM00105* under *Administrator* 〉 *Mash-up Authoring*
2. Update the URL to connect to the SAP ERP system.
    1. Log in to ERP system SICF and execute *ldai2q5e.wdf.sap.corp* .
    2. Launch the ERP customer cockpit from your cloud for customer account to quickly edit transactions in SAP ERP system.

3.10 Account 360 Overview of Customer in SAP S/4HANA

Launch the SAP S/4HANA Customer 360 app from your system and get a complete overview of your customers in S/4HANA backend system.

Launch this app in the *Overview* tab for customers under *Actions* 〉 *Customer 360 Overview* . Use this connection to your S/4HANA system to:

- Review aggregated sales data over a period of time.
- Navigate to application areas such as Manage Sales Orders, Quotations, Sales Contracts, and Resolve Sales Order Issues and use these features
- View customer returns, credit memos, debit memos, and billing documents.
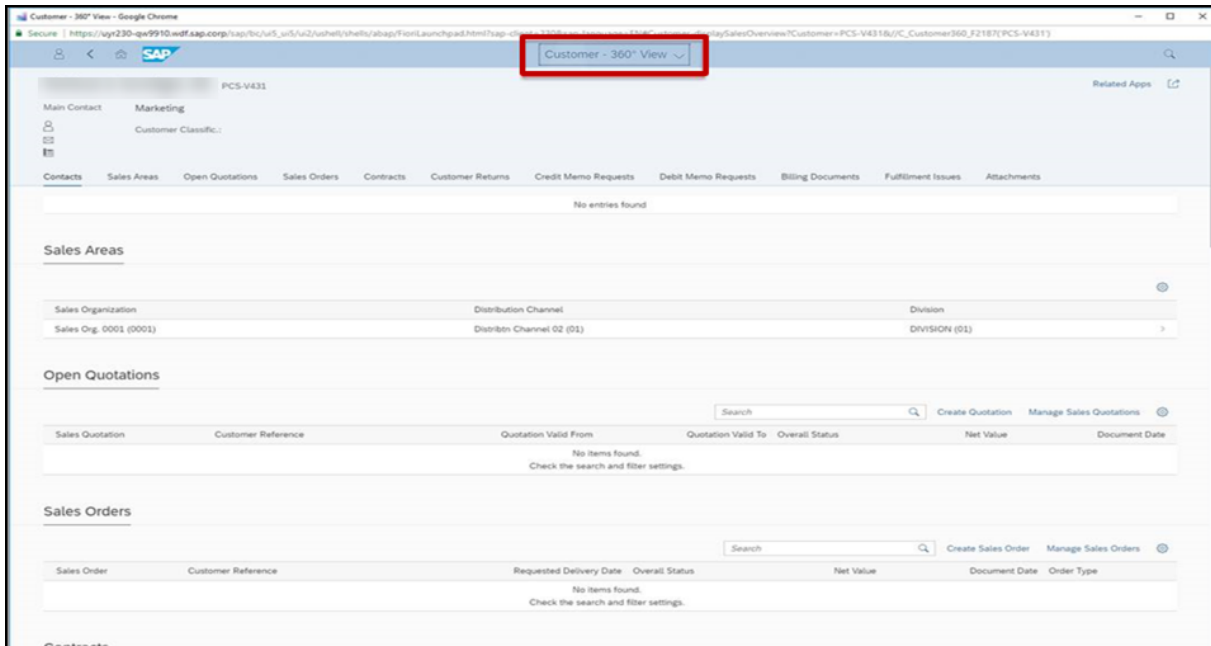
3.10.1 Configure Account 360 Overview

Administrators can configure the connection to launch 360 overview for customers in your SAP S/4HANA system.

Under ⯈ *Administrator* ⯈ *Mashup Authoring* ⯈, look for URL mashup with description *S/4 HANA 360 Object Page* and replace the dummy URL with the URL for your SAP S/4HANA system.

See the following examples of the URL that you must enter:

1. URL with Fiori (If you want to access Account 360 using Fiori Launchpad)
   `https://uyr230-qw9910.wdf.sap.corp/sap/bc/ui5_ui5/ui2/ushell/shells/abap/`
   `FioriLaunchpad.html?sap-client=230`
2. URL with Client (If you want to access Account 360 using a client)
   `https://cc2-715.wdf.sap.corp/ui?sap-client=715`
3. URL without client (If you want to access Account 360 without using a client)
   `https://vsldev.vslhana.com:9001/sap/bc/ui2/flp`

Once you update the URL in the mashup, the implementation generates the FINAL_URL to access the Customer 360 overview by adding the LANGUAGE and CUSTOMER instance details based on the information in Cloud for Customer.

3.11 Social Media Profiles

Maintain social media profiles for your accounts and contacts.

- Create social profiles of individual customers and contacts.
- Track both inbound and outbound social media interactions from the *Social Media Message* tab.
- In **Cloud for Service**, use social media channels to work with customers.

For more information, see Enabling Social Media Features.

3.11.1 Configure Social Media Features

Administrators can configure social media to enable collaboration with customers and partners.

Your SAP Cloud for Social Engagement solution is delivered with the social media features available but hidden. As an administrator, you need to enable the social media features of the solution using *Adaptation Mode*.

1. To enter adaptation mode click *Adapt*, then choose *Enter Adaptation Mode*.
2. Navigate to each of the screens listed below and make the screen edits indicated for each.
    1. When you're on the screen you want to edit, click *Adapt*, then choose *Edit Screen*.
    2. Add or remove elements on the *Screen Layout* tab.
    3. Save your changes.
       You can test your changes before publishing.
    4. When you're finished with your changes you can publish them to make them visible to all users.

Screens to Edit for Enabling Social Media Features

Screen	Navigation	Edits	Notes
Service and Social Settings	▶ *Administrator* ❯ *Service and Social Settings* ❯	Under *Sections*, check the box for *Social Media* to make it visible.	You need to make this change before you can set up any social media channels in your system.
Individual Customers	▶ *Customers* ❯ *Individual Customers* ❯	Under *Fields*, check the box for *Social Media Profile* to make that column visible in the list.	

Screen	Navigation	Edits	Notes
Individual Customer	▶ *Customers* ❭ *Individual Customers* ❭ then choose a customer to open the details screen	• Under *Sections*, check the box for *Social Information* to make it visible. With *Social Information* selected, under *Fields*, ensure the boxes are checked for *Facebook* and *Twitter*. • Under *Sections*, select *Tabs*, then in the lower list, select *Social Media Messages* and *Social Profiles*.	You need to have at least one customer record in the system before you'll be able to adapt the details screen.

Related Information

Adapting the User Interface ➦

3.12 Prepackaged Integration with SAP MDG

An out-of-the box bi-directional replication with SAP Master Data Governance (MDG) is now available for use in business partner merge scenarios.

Following scenarios are supported:

- In the event of a business partner cleansing and consolidation process in SAP MDG, a merge case is created in SAP Cloud for Customer.
- SAP Cloud for Customer executes merge process and automatically marks the oldest available record (using creation date) as golden record.

3.13 Integration with LinkedIn Sales Navigator to Access Relationships and Key Contacts

Find a new section - *LinkedIn Sales Navigator* in the *Overview* tab and *Contacts* tab for accounts and contacts and in the buying center. Click *Sign-In* in this section to navigate to linkedIn to find relationships and key contacts. Use the rich LinkedIn profile data to record activities with prospects and customers, view recent activities of your contacts and find a topic of interest to help you start a conversation with your prospects.

The LinkedIn Sales Navigator uses basic information such as first name, last name, email address, job title, and company name to find the correct company or person on LinkedIn. You can also perform a search if you are unable to find appropriate contacts or customers. For your contacts, the *Save as Lead* option in the widget allows you to save the person as a lead in the LinkedIn Sales Navigator. Such leads are not recorded in SAP Cloud for Customer. In addition to basic information mentioned above, there is no further data exchange between SAP Cloud for Customer and LinkedIn.

To use this feature, you need to:

- Use a standard LinkedIn account.

  > i Note
  >
  > If you have signed in to LinkedIn with a different account, you are automatically signed in with that account. To re-login with the standard account, first clear your previous browsing cookies.

- Enable browser cookies:
  - For Google Chrome, go to ▐▶ *Settings* ❯ *Advanced* ❯ *Privacy and security* ❯ *Content settings* ❯ *Cookies* ❯ *Allow* ▌ and add `[*.]linkedin.com`
  - For Internet Explorer, go to ▐▶ *Internet Options* ❯ *Security* ❯ *Trusted sites* ❯ *Sites* ▌ and add `http://linkedin.com`

- Select the relevant mashup using personalization.

3.13.1 Configure LinkedIn's Sales Navigator

Administrators can enable Sales Navigator to allow users to look up LinkedIn information of an account or a contact.

> **i Note**
>
> Sales Navigator Enterprise licenses are required from LinkedIn to use this feature.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* ◀. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Communication and Information Exchange* 〉 *Integration with External Applications and Solutions* 〉 *Integration with LinkedIn Sales Navigator* ◀ to find the corresponding scoping question.

3.14 Accounts Offline

This topic presents an overview of features supported for accounts in offline mode. Accounts create, edit and display is supported in the offline mode.

> **i Note**
>
> - All Related Activities of Accounts are not downloaded.
> - In offline mode, newly created accounts show up with their temporary IDs when used in other transactions. The details are resolved properly once you synchronize and the entries are created online.

CONTACTS

Offline Scope

			Create Screen		Detailed View	
Tab	Section	Field	Create	Default	Display	Edit (directly/ via actions/via navigation)
Overview	Header Fields	Status			Y	Y
		Role	Y	Y	Y	N
		Name	Y	N	Y	Y
		Additional Name	Y	N	Y	Y

Tab	Section	Field	Create Screen		Detailed View	
			Create	Default	Display	Edit (directly/ via actions/via navigation)
		Additional Name 2			Y	Y
		Additional Name 3			Y	Y
		Prospect			Y	Y
		Role	Y	Y	Y	Y
		Country/ Region	Y	N	Y	Y
		PO Box			Y	Y
		PO Box ad- dress			Y	Y
		PO Postal Code			Y	Y
		Time Zone			Y	Y
		C/O			Y	Y
		address Line 1			Y	Y
		address Line 2			Y	Y
		House Num- ber	Y	N	Y	Y
		Street	Y	N	Y	Y
		address Line 4			Y	Y
		address Line 5			Y	Y
		City	Y	N	Y	Y
		State	Y	N	Y	Y

| Tab | Section | Field | Create Screen | | Detailed View | |
			Create	Default	Display	Edit (directly/ via actions/via navigation)
		Postal Code	Y	N	Y	Y
		Primary Contact			Y	Y
		Phone	Y	N	Y	Y
		ABC Classi- fication	Y	N	Y	Y
		Fax	Y	N	Y	Y
		Email	Y	N	Y	Y
		WebSite	Y	N	Y	Y
		Owner	Y	N	Y	Y
		Language	Y	N	Y	Y
		Mobile	Y	N	Y	Y
		Top Level Owner			Y	N
		Legal Form			Y	
		Industry	Y	N	Y	Y
		Active Pipe- line			Y	N
		Permission			Y	N
		YTD Reveue			Y	N
		Account ID	Y	N	Y	N
		External ID			Y	N
		External System			Y	N
		Created on			Y	N
		Created By			Y	N

Tab	Section	Field	Create Screen		Detailed View	
			Create	Default	Display	Edit (directly/ via actions/via navigation)
		Changed on			Y	N
		Changed by			Y	N
		Duns			Y	N
		Order Block			Y	N
		Delivery Block			Y	N
		Billing Block			Y	N
		Sales Su- port Block			Y	Y
		Notes			N	N
		Prospect In- dicator	Y	Y		
		Parent Ac- count	Y	N		
		Country/ Region	Y	N		
		Mobile	Y	N		
		Duns Num- ber	Y	N		
		Contact Per- mission	Y	N		
		Language	Y	N		
		Extension Fields	Y	N		
Sales Data	Sales Data	Sales org			Y	NA
		Distribution Channel			Y	NA
		Division			Y	NA

Tab	Section	Field	Create Screen		Detailed View	
			Create	Default	Display	Edit (directly/ via actions/via navigation)
		Sales Office			Y	NA
		Sales Group			Y	NA
	Details	Sales Or- ganization			Y	N
		Distribution Channel			Y	N
		Division			Y	N
		Sales office			Y	Y
		Customer Group			Y	Y
		Delivery Pri- ority			Y	Y
		Order Block			Y	Y
		Delivery Block			Y	Y
		Billing Block			Y	Y
		Sales Sup- port Block			Y	Y
		Sales Group			Y	Y
		Incoterms			Y	Y
		Incoterm Location			Y	Y
		Currency			Y	Y
Activities	Appoint- ment	Subject			Y	Y
		Status			Y	Y
		Start Date/ Time			Y	Y

Tab	Section	Field	Create Screen		Detailed View	
			Create	Default	Display	Edit (directly/ via actions/via navigation)
		Owner			Y	Y
		Primary Contacts			Y	Y
	Tasks	Subject			Y	Y
		Status			Y	Y
		Start Date/ Time			Y	Y
		Owner			Y	Y
		Primary Contacts			Y	Y
	Phone Calls	Subject			Y	Y
		Status			Y	Y
		Start Date/ Time			Y	Y
		Owner			Y	Y
		Primary Contacts			Y	Y
	E-Mails	Subject			N	N
		Status			N	N
		Start Date/ Time			N	N
		Owner			N	N
		Primary Contacts			N	N
Opportuni- ties	Opportuni- ties	Name			Y	Y
		Close Date			Y	Y

Tab	Section	Field	Create Screen		Detailed View	
			Create	Default	Display	Edit (directly/ via actions/via navigation)
		Sales Phase			Y	Y
		Owner			Y	Y
		Status			Y	Y
		Progress			Y	Y
Contacts	Contacts	Name			Y	Y
		Job Title			Y	Y
		Function			Y	Y
		Department			Y	Y
		Phone			Y	Y
		Fax			Y	Y
Addresses	Addresses	Address			Y	Y
		Phone			Y	Y
		Fax			Y	Y
		Main			Y	Y
		Action			Y	Y
Relation-ships	Relation-ships	Relationship Type			Y	Y
		Business Partner			Y	Y
		Address			Y	Y
		Action			Y	Y
Visits	Visits	Subject			Y	Y
		Status			Y	Y
		Owner			Y	Y

Tab	Section	Field	Create Screen		Detailed View	
			Create	Default	Display	Edit (directly/ via actions/via navigation)
		Primary Contacts			Y	Y
		Phone			Y	Y
Promotions					N	NA
Sales Orders					N	N
Product List					N	NA
Charts					N	NA
Service Requests					N	N
Attachments					N	NA
Account Team					N	N
Account Hierarchies					N	NA
Leads					N	N
Campaign					N	NA
Sales Quotes					N	N
Visit Hours					N	NA
Installed Base			N		Y	N
Marketing Attributes					N	N
Service contracts						NA
Sales Territory					NA	NA

| Tab | Section | Field | Create Screen | | Detailed View | |
			Create	Default	Display	Edit (directly/ via actions/via navigation)
Feed					NA	NA
Target Group					NA	NA
Sales leads					NA	NA
Registered Products			N		Y	NA
Recent Orders					NA	NA
Groups					NA	NA
Survey results					NA	NA
External Followup Document					NA	NA

Offline Action

Object	Global / Tab	Actions	Offline Availability
Accounts	Activities (Appointments, Tasks, Phone Calls)	New	Y
	Opportunities	New	Y
	Contacts	New	Y (currently not supported.)
	Addresses	New	Y (currently not supported.)
	Relationships	New	Y (currently not supported.)
	Visits	New	Y
	Global	Block	N
		Set to Obsolete	N
		Derive Territory	N
		International Version	N

3.15   Accounts FAQs

3.15.1 What are the conditions under which the customer merge can fails?

Customer merge can fail under very few conditions, primarily in case of the customer being open in edit mode by another user (locked for editing) or in case there are any PDI validations that result in failure.

3.15.2 What are the conditions under which transaction re-parenting can fail?

Transaction re-parenting from duplicate to master record can fail for many reasons. The primary reasons can be as follows:-

1. Transaction status does not allow any modification, for example, a service ticket that is in status *Confirmed* or *Completed* cannot be modified on the user interface. Hence a confirmed service ticket cannot be re-parented during merge process.
2. Another case could be that the transaction is in-approval status like sales quote in approval.
3. Validation in SAP Cloud Applications Studio fails and results in error.
4. Transaction was locked by another user during the merge process and hence could not be modified.

3.15.3 Where can I find the list of transactions which could not be re-parented, if merge status is 'Merge Completed - Realignment Failed'?

Navigate to the merge details view and click on the *Transactions* screen. This lists the transactions along with transaction type which could not be re-parented.

3.15.4 Where can I see the reason why the merge has failed for a particular transaction?

Navigate to the merge details view and click on the *Result Log* screen. You will see a *Results* table. Select the entry with the status *Error* and click on *Application log ID*. In the application log view , click on *Results Log* screen. This view lists all the errors which prevented the customer merge or transaction re-parenting.

3.15.5 What should I do when the merge has failed (status as 'Merge Failed' or 'Merge Completed - Realignment Failed'.

Navigate to the *Data Cleansing* work center and customer merge data set. Select the merge instance that has failed and then click on *Initiate*. You will observe that the status will change to *Merge In Process*. The system will retry merging the customer instances.

4 Leads

Lead generation and management is the first step of your sales and marketing process. In this step, you can capture any interest in your products and services, and qualify and nurture the interest to turn your potential customers into real clients.
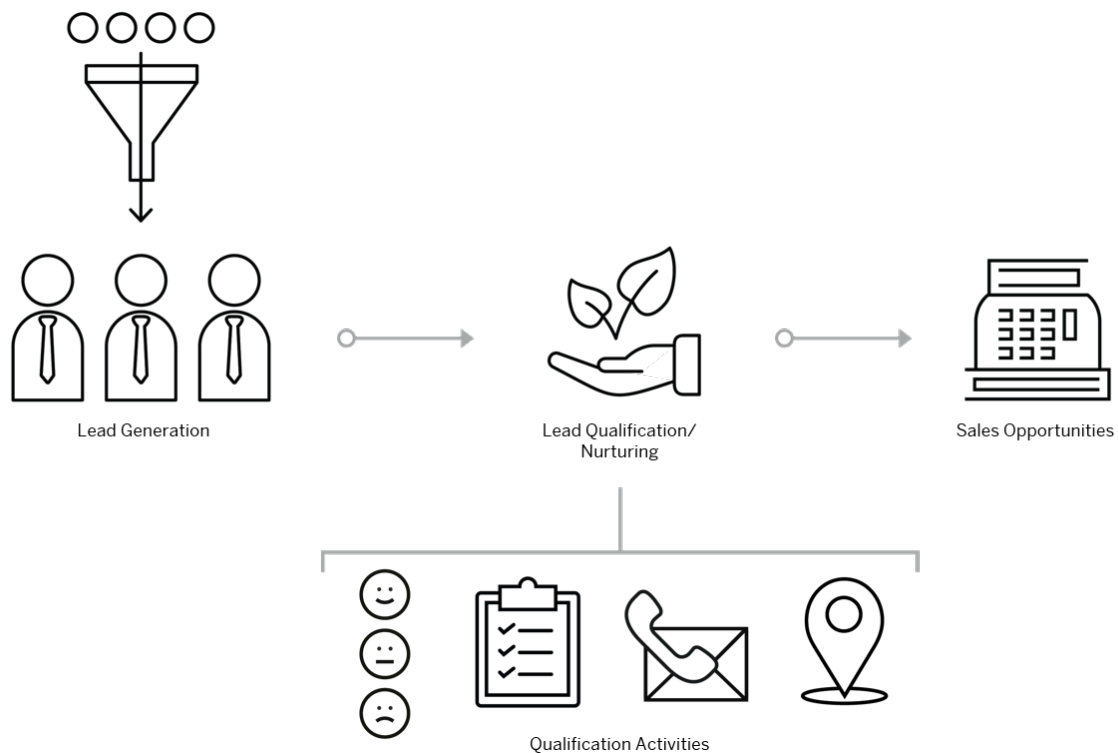
Leads can come from a wide range of sources. It can be as simple as a customer inquiry on the phone or an active participation in your email campaign. With SAP Cloud for Customer, you can add a lead into your system easily. Imagine that you are at a trade show. Someone comes to your booth to seek more information about your products. You shake hands and exchange business cards. After the conversation, you can just take out your phone and create the lead on the site by scanning that business card. The solution also allows you to import a large quantity of leads at once using Microsoft Excel or SAP Cloud for Customer's APIs.

Lead nurturing refines your prospects. To increase your business efficiency, you may just want to focus on the leads that have a higher chance to be converted to sales opportunities. SAP Cloud for Customer equips you with a variety of tools that help you score, qualify, and identify leads that are more likely to make a purchase.

4.1   Scope and Configure Leads

Administrators can configure leads using scoping, scoping questions, and fine-tuning activities.

Scoping questions and fine-tuning activities that are self-explanatory may not be included in this list.

4.1.1 Enable Leads

Administrators can add leads to your project scope.

Go to ▎▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▎▶ *Edit Project Scope* ❭ *Questions* ❭ *Sales* ❭ *Lead Management* ❭ and check the box next to the scoping item for using leads.

4.1.2 Configure Number Range

Administrators can specify the range of numbers that the ID of the lead records can take.

Go to ▎▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▎▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Leads* ❭ *Number Range* ❭ *Maintain Number Range* ❭ to specify the numbers.

4.1.3 Configure Involved Parties

Administrators can maintain involved parties for leads by assigning party roles and using determination rules.

Go to ▎▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▎▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Leads* ❭ *Involved Parties* ❭ *Maintain Involved Parties* ❭ to edit your involved parties.

In addition, you can assign at most three custom party roles to the user interface and enable sales reps to directly edit those roles in lead quick create or overview. Those custom party roles can also show up on the lead conversion screen and be carried over to opportunities converted from the lead. This feature is only available online.

4.1.4 Configure Sources

Administrators can maintain sources that capture the origin of your leads.

Go to ▎▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▎▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Leads* ❭ *Sources* ❭ *Maintain Sources* ❭ to edit your sources.

4.1.5 Configure Categories

Administrators can maintain categories that classify your elements such as leads and opportunities.

Go to ▎▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▎▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Leads* ❭ *Categories* ❭ *Maintain Categories* ❭ to edit your categories.

4.1.6 Configure Assignment of Categories

Administrators can activate categories for leads via assignment.

Go to ❯ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ❯ *Open Activity List* ❯ *Fine-Tune* ❯ *Leads* ❯ *Assignment of Categories* ❯ *Assign Categories* ❯ to assign your categories.

4.1.7 Configure Qualifications

Administrators can maintain qualifications that classify leads in terms of how promising they are for your business.

Go to ❯ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ❯ *Open Activity List* ❯ *Fine-Tune* ❯ *Leads* ❯ *Qualifications* ❯ *Maintain Qualifications* ❯ to edit your qualifications.

4.1.8 Configure Status

Administrators can customize lead statuses and define conversion actions for each status.

Context

You can edit statuses by adding and deleting rows.

Procedure

1. Go to ❯ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ❯ *Open Activity List* ❯ *Fine-Tune* ❯ *Leads* ❯ *Status* ❯ *Maintain Status* ❯.
2. Click *Add Row* to create a new status.
3. Enter a number as *Sort Sequence*. It determines where the new status appears in the drop-down list of your lead status and has no influence on how leads are processed.
4. Specify the *Status Code*. Customized status codes must begin with the identifier *Z*.
5. Select an *Internal Status* in which your new status will be active. A customized status should always be connected to a pre-delivered status and follow the internal logic that particular status represents.
6. Give a name to your new status in the *Description* field.
7. Decide whether your new status should be the initial status for newly created leads.

   > **i** Note
   >
   > Only one status can be set as *Initial Status*.

> Statuses connected to *Converted*, *Accepted*, or *Declined* cannot be set as *Initial Status*.

8. Check *Active* to make the status visible for your users.
9. Decide which conversion actions should be available for leads that attain this new status.
10. Decide whether the lead with this new status can be submitted for approval.

> **i** Note
>
> You cannot delete a pre-delivered status, but you can deselect the *Active* checkbox. In response, the status will no longer appear, and users cannot search for leads with this status. However, leads that are assigned to this status will continue to display it.
>
> You can remove a customized status only when it is not in use in the application.

4.1.9 Configure Reasons

Administrators can maintain reasons that specify why a status has been set.

Go to ▶ *Business Configuration* ▶ *Implementation Projects* . Select your project and navigate to ▶ *Open Activity List* ▶ *Fine-Tune* ▶ *Leads* ▶ *Reasons* ▶ *Maintain Reasons* to edit your reasons.

4.1.10 Configure Assignment of Reasons

Administrators can activate reasons for applicable lead statuses via assignment.

Go to ▶ *Business Configuration* ▶ *Implementation Projects* . Select your project and navigate to ▶ *Open Activity List* ▶ *Fine-Tune* ▶ *Leads* ▶ *Assignment of Reasons* ▶ *Assign Reasons* to assign your reasons.

4.1.11 Configure Conversion Limit

Administrators can specify how many times a lead can be converted into an opportunity.

Go to ▶ *Business Configuration* ▶ *Implementation Projects* . Select your project and navigate to ▶ *Open Activity List* ▶ *Fine-Tune* ▶ *Leads* ▶ *Maintain Conversion Limit* to specify the number of times.

4.1.12 Configure System Message Severity

Administrators can upgrade or downgrade the severity level of system messages in leads.

Go to ▶ *Business Configuration* ▶ *Implementation Projects* . Select your project and navigate to ▶ *Open Activity List* ▶ *Fine-Tune* ▶ *Leads* ▶ *Messages* ▶ *Message Severity Configuration* to edit message severity.

4.1.13 Configure Multi-Step Approval Process

Administrators can enable a multi-step approval process for leads through configuration.

Go to ▌ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▌ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Lead Management* ❯ *Leads* ▐ to find the corresponding scoping question and enable detailed process configuration in ▌ *Administrator* ❯ *Approval Processes* ▐.

4.1.14 Configure Contact as Optional Field

Administrators can enable users to create a lead without contact information through configuration.

Go to ▌ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▌ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Lead Management* ❯ *Leads* ▐ to find the corresponding scoping question.

4.1.15 Configure Disablement of Lead Historical Analysis

Administrators can set up the solution to stop capturing lead versions or major changes that allow users to check lead progression in data source over time.

Go to ▌ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▌ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Lead Management* ❯ *Leads* ▐ to find the corresponding scoping question.

> **i** Note
>
> The information tracked in the data source contains more details than the standard change history seen under the *Changes* tab in a lead. You can use the lead history data source *CODMKLEAHHB* to create a report in *Business Analytics* and gain insights into the lead lifecycle.

4.1.16 Configure Lead Aging Notifications

Administrators can enable and configure lead aging notifications in scoping and fine-tuning activities.

Context

Administrators must scope the feature before you can configure it.

Procedure

1. Go to ▌▶ *Business Configuration* ▶ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *Lead Management* ▶ *Leads* ▌ to find the corresponding scoping question and trigger lead aging notifications only when a lead has reached its age.

> → Tip
>
> We recommend that you trigger lead aging notifications only when relevant, for better system performance.

2. Go to ▌▶ *Business Configuration* ▶ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Open Activity List* ▶ *Fine-Tune* ▶ *Lead Aging Duration* ▌ to define the duration for a lead to remain in an unqualified status, beyond which the lead aging notification will be triggered.

3. Go to ▌▶ *Business Configuration* ▶ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Open Activity List* ▶ *Fine-Tune* ▶ *Business Task Management for Expiration of Lead Aging Alert* ▌ to define system notification details for an aged lead.

4.1.17 Configure Lead Creation with Existing Accounts by Default

Administrators can set up the solution to use an existing account as default for lead creation.

Go to ▌▶ *Business Configuration* ▶ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *Lead Management* ▶ *Leads* ▌ to find the corresponding scoping question.

4.1.18 Configure Lead Creation with Existing Accounts by Role

Administrators can restrict specific business roles to create leads using existing accounts only.

Context

Users assigned to roles with this restriction must use an existing account for lead creation.

Procedure

1. Go to ▶ *Administrator* 〉 *General Settings* 〉 *Business Roles* ▶.
2. Select the desired role and click *Edit*.
3. Navigate to the *Fields and Actions* tab.
4. In the *Business Action Restrictions* section, add a row to the table.
5. Search for *LEAD_WITH_EXISTING_ACCOUNT* and select the entry for leads.

   The *Access Restriction* field defaults to *Disabled*.

4.1.19 Configure Lead Creation for Individual Customers by Role

Administrators can authorize specific business roles to create leads for individual customers only.

Context

Users assigned to roles with this restriction can create leads as individual customers only.

Procedure

1. Go to ▶ *Administration* 〉 *General Settings* 〉 *Business Roles* ▶.
2. Select the desired role and click *Edit*.
3. Navigate to the *Fields and Actions* tab.
4. In the *Business Action Restrictions* section, add a row to the table.
5. Search for *LEAD_WITH_CREA_BY_INDIV_CUS* and select the entry for leads.

   The *Access Restriction* field defaults to *Disabled*.

4.1.20 Configure Lead Duplicate Check

Administrators can enable and configure lead duplicate check in scoping and fine-tuning activities.

Context

Administrators must scope the feature before you can configure it.

Procedure

1. Go to ▌▶ *Business Configuration* ▶ *Implementation Projects* ▐. Select your project and navigate to ▌▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *Lead Management* ▶ *Leads* ▐ to find the corresponding scoping question and enable duplicate check for leads.

2. Go to ▌▶ *Business Configuration* ▶ *Implementation Projects* ▐. Select your project and navigate to ▌▶ *Open Activity List* ▶ *Fine-Tune* ▶ *Lead Duplicate Check* ▐ to configure duplicate check details.

   You can assign *Weighting* to available lead fields. The higher the weightage for the field, the more importance is placed on the field when the solution finds duplicates.

   You can also enable *Duplicate Check for Mass Import* for your users when they upload leads from a spreadsheet or use A2X services. You can configure the *Overall Threshold*. The threshold defines the similarity of the match, beyond which a lead will not be imported as a duplicate.

4.1.21 Configure Note History Viewing and Editing

Administrators can enable users to see and change earlier versions of lead notes through configuration.

Go to ▶ *Business Configuration* ▶ *Implementation Projects* ▮. Select your project and navigate to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *Lead Management* ▶ *Leads* ▮ to find the two corresponding scoping questions.

4.1.22 Configure Sales Area Data for Lead Conversion

Administrators can set up the solution to keep sales area data when a lead is converted to an account, or an account and contact. Sales area data include sales organization, sales group, sales office, distribution channel, and division.

Go to ▶ *Business Configuration* ▶ *Implementation Projects* ▮. Select your project and navigate to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *Lead Management* ▶ *Leads* ▮ to find the corresponding scoping question.

4.1.23 Configure Selection of Sales Area Data Combinations

Administrators can enable users to select a combination of sales area data including sales organization, distribution channel, and division during lead creation. The combinations need to be predefined in either or both of the matching account and employee in the *Accounts* and *Employees* work centers.

Go to ▶ *Business Configuration* ▶ *Implementation Projects* ▮. Select your project and navigate to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *Lead Management* ▶ *Leads* ▮ to find the corresponding scoping question.

4.1.24 Configure Reopening of Accepted or Declined Leads

Administrators can enable users to reopen accepted or declined leads through configuration.

Go to ▶ *Business Configuration* ▶ *Implementation Projects* ▮. Select your project and navigate to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *Lead Management* ▶ *Leads* ▮ to find the corresponding scoping question.

4.1.25 Configure Association of Registered Products in Leads

Administrators can enable users to create leads with references to previously sold products through configuration.

Go to ▶ *Business Configuration* ▶ *Implementation Projects* ▮. Select your project and navigate to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *Lead Management* ▶ *Leads* ▮ to find the corresponding scoping question.

4.1.26 Configure Decoupling Lead Status and Qualification Level

Administrators can set up the solution to retain the current lead status when a qualification level is set.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Lead Management* ❯ *Leads* ▶ to find the corresponding scoping question and decouple lead status and qualification level.

4.1.27 Configure Lead Routing Rules

Administrators can create routing rules for automatic lead assignment.

Context

Once the routing rules are defined, leads will be automatically assigned to owners, marketing units, and territories upon lead creation.

> **i Note**
>
> Territories must be enabled in scoping before it works in the lead routing.

Procedure

1. Go to ▶ *Administrator* ❯ *Sales and Campaign Settings* ❯ *Define Rules for Lead Assignment* ▶ to launch the rules table.
2. If it is your first time to create rules, use *Adapt Columns* to set up the rules table. You can have up to 20 columns in the table, including last three result columns, *Owner*, *Marketing Unit*, and *Territory*.

   > **→ Tip**
   >
   > We recommend that you remove any unwanted columns and only keep required ones as extra columns can impact performance.

3. Choose *Insert Row* above the rules table. A new row with an asterisk in each field will be added to the table.

   You can add values to more than one field in a row. The fields in one row evaluate as a logical **AND** relationship, which means the field values must all evaluate to true in order for the rule to evaluate to true.
4. Click the asterisk symbol in a cell to enter a value for that field. The rules table offers a variety of logical operators to define your values.

> → Tip
>
> We recommend that you take full advantage of operators to consolidate your rules for better system performance.
>
> For example, if your rules determine assignments based on zip codes, you can use the *Between* operator to set up a range of zip codes in sequence, or you can use the *Include* operator to group zip codes that have the same prefix.

5. Continue to add rows for each desired result.

   The rows in the rules table evaluate as a logical **OR** relationship. The system will compare each rule from top to bottom until it finds one match, which suggests that the most specific rule should be placed at the top of the table and generic ones should be near the bottom.

   You can rearrange rows by selecting the row and clicking *Swap*.

6. Click *Save* when you finish.
7. Click *Activate Rules*.

   For your updated rules, unless you reactivate them, otherwise the previous rule sets will continue to execute.

4.1.28 Configure Lead Routing to Territories

Administrators must enable lead routing to territories before using it in lead routing rules.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Lead Management* ❯ *Leads* ▶ to find the corresponding question and enable assigning leads to territories.

> → Remember
>
> You can see the *Territory* column in the lead routing rules table, regardless of scoping. However, the lead routing rules will not assign your leads to territories until you enable it.

4.1.29 Configure Automatic Lead Routing Triggers

Administrators can define when automatic lead routing needs to be triggered using workflow rules.

Context

By default, activated lead routing rules automatically execute upon lead creation. By using workflow rules, administrators can also set up the solution to run lead routing on saving a lead or on a customized schedule.

Procedure

1. Go to ▶ *Administrator* ❯ *Workflow Rules* ❯, and create a new workflow rule.
2. Give a meaningful name in the *Description* field.
3. For *Business Object*, choose *Leads*.
4. For the *Timing* type, you can choose from *On Create Only*, *On Every Save*, and *Scheduled*. If the timing field is left blank, *On Every Save* will be applied by default.

   This selection decides when your rule, in this case *Assign Leads Using Rules*, will be triggered.
5. (Optional) Define conditions which you can also configure in the routing rules table.
6. For *Rule Type*, choose *Action* and select *Assign Leads Using Rules*.
7. Review and activate your workflow rule.

4.1.30 Configure Lead Routing for Local Administrators

Local administrators can be assigned to geographical areas for which they can create rules.

Context

Only administrators with global access rights can create and edit lead routing restrictions for local administrators.

Procedure

1. Go to ▶ *Administrator* ❯ *Sales and Campaign Settings* ❯ *Define Rules for Lead Assignment* ❯ to launch the rules table.
2. Choose *Add Row* under the *Local Administrators Restrictions* section.
3. Enter a *Country* and *Region* to allow for rule creation.
4. Choose a local administrator for that country and region.
5. Continue to add rows for each local administrator you want to assign.
6. Click *Save*.

4.1.31 Configure Automatic Refresh from Activity Plan

Administrators can use workflow rules to define when leads can be automatically refreshed to obtain an updated list of to-do surveys and tasks.

Context

By using workflow rules, applicable surveys and tasks can be assigned on creating or saving a lead, or on a customized schedule.

Procedure

1. Go to ▶ *Administrator* ❯ *Workflow Rules* ❭, and create a new workflow rule.
2. Give a meaningful name in the *Description* field.
3. For *Business Object*, choose *Leads*.
4. For the *Timing* type, you can choose from *On Create Only*, *On Every Save*, and *Scheduled*. If the timing field is left blank, *On Every Save* is applied by default.

   This selection decides when your rule, in this case *Refresh from Activity Plan*, is triggered.
5. (Optional) Define conditions that you can also configure in the *Routing Rules* section in the *Activity Planner* work center.
6. For *Rule Type*, choose *Action* and select *Refresh from Activity Plan*.
7. Review and activate your workflow rule.

4.1.32 Configure LinkedIn Sales Navigator

Administrators can enable LinkedIn Sales Navigator to allow users to look up publicly available LinkedIn profile information of an account or a contact.

> **i** Note
>
> A LinkedIn Sales Navigator Team or Enterprise license is required to use this feature. You can sign up for a free trial here 🡕 .

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❭. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Communication and Information Exchange* ❯ *Integration with External Applications and Solutions* ❯ *Integration with LinkedIn Sales Navigator* ❭ to find the corresponding scoping question.

4.1.33 Configure Business Card Scanner

Administrators can enable Business Card Scanner so users can capture leads on their mobile devices.

Prerequisites

The appropriate number of licenses for business card scans are required from ABBYY, a non-SAP site at http://cloud.ocrsdk.com

> i Note
>
> Each business card scan counts as one A4 scan.

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Procedure

1. Log on to your SAP solution and go to ▌ *Administrator* ❯ *Mashup Web Services* ❯ *Business Card Scanner Service* ▐.
2. Click *Enter API Keys*.
3. Click *Show API Keys*.
4. Enter the username and password that you received from ABBYY.
5. Save your entries.
6. Back on the *Web Mashup Services* screen, select the row of *Business Card Scanner Service* and activate it.

4.1.34 Configure Deal Finder

Admnistrators can enable and configure deal finder to help users identify most promising leads.

> i Note
>
> As a prerequisite, machine learning powered by SAP Leonardo must be enabled so that lead scores can be calculated in deal finder. For more information, see **Machine Learning in SAP Cloud for Customer** in the related information section.

Add the Deal Finder Tile to the Home Page

Administrators must add the deal finder tile to the home page to allow users with appropriate roles to access deal finder.

1. Open the home page.
2. Click the pencil icon at the bottom right and go to the *Adapt* mode.
3. Select the business role with which users will work with the deal finder and click *Go*.
4. Navigate to the *Scorecards* section.
5. Find the *Deal Finder* scorecard, and add it to the role.
6. Decide whether you want to make deal finder visible for all users with that business role.
7. Click *Publish* to save your changes for that business role.

Save Queries

Administrators must add at least one query with topics as the search parameter for users to see topics in deal finder.

1. Go to ▐ *Sales* ❯ *Leads* ▐ or ▐ *Sales Campaign* ❯ *Leads* ▐ .
2. Click your profile on the top right corner of your screen, and select *Start Adaptation*.
3. Select the filter icon.
4. Enter filters parameters to refine your query result. For example, you can set *Qualification Level* as *Hot* and get a list of high qualified leads for users to review in deal finder.
5. Click *Save Query As*. ave and apply the query. The name you enter will be the name of the topic in deal finder.
6. In the pop-up box, you can give the query a name, and opt to make it your default query. The name you enter will be the name of the topic in deal finder.
7. Click *Save*. A new query is created, and it appears in your default selection drop down list.
8. Click your profile and select *End Adaptation*.

Related Information

Machine Learning in SAP Cloud for Customer

4.1.35 Configure Lead Deletion

Administrators can prevent or limit the users allowed to delete leads.

> **i Note**
>
> You can only delete leads that have not been converted.

By default, leads can be deleted by users. As an administrator, if your company does not allow leads to be deleted, you can *Adapt* all user screens and hide the delete function.

If you want to allow only a few selected users to delete leads, you can define those using the appropriate access restrictions.

4.1.36 Configure Depersonalization in Leads

Administrators can remove personal data from a business object to ensure compliance with the applicable data protection requirements.

> **i Note**
>
> Depersonalization is only available to administrators with access to the *Data Protection and Privacy* work center.

In leads, depersonalization triggers a deletion. Once a lead is depersonalized, you can go to ▶ *Administrators* ❯ *General Settings* ❯ *Data Management* ❯ *Deleted Data* ❯ to view the deleted record. You cannot depersonalize a lead if it contains a person that is blocked for removal.

In case you need to retain certain information, you can download relevant data using OData or Data Workbench prior to depersonalization.

> **i Note**
>
> When employees and contacts are removed from an account, the associated business transactions such as leads and deal registration are also deleted by default. If needed, administrators can restrict personal data deletion to the individual level. The transactions remain, allowing sales users to see the complete information about the customer.
>
> To enable this functionality, go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Built-in Services and Support* ❯ *System Management* ❯ *Security* ❯ to find the corresponding scoping question.

For more information, see .

4.2 Create Leads

Leads can be generated from different sources such as marketing campaigns, referrals, and social media. Any unprocessed contact or company information you collect can become a lead. SAP Cloud for Customer offers you full flexibility to create, track, and follow up on your leads.

Leads can be created in the following ways:

- Create leads manually from the quick create icon
- Import leads from Microsoft Excel

- Upload leads through SAP Cloud for Customer APIs
- Scan a business card on your mobile devices
- Copy an existing leads

You can also add existing or create new relevant leads as reference to the current lead under the *Related Leads* tab.

> **i Note**
>
> You can only add related leads to a lead that is not converted, or a lead that is converted yet has not reached maximum conversion limit.

Import Leads from Microsoft Excel [page 260]
    You can upload a batch of leads from a Microsoft Excel template.

Use Business Card Scanner [page 261]
    You can create a lead on the spot using Business Card Scanner on your mobile device.

Check for Lead Duplicates [page 263]
    Lead duplicate check is a combination of account duplicate check and lead duplicate check.

Assign Leads [page 265]
    Leads are often assigned automatically upon creation, provided the lead routing rules have been defined by your administrators. If there is no rule applicable, you own all the leads you create.

4.2.1 Import Leads from Microsoft Excel

You can upload a batch of leads from a Microsoft Excel template.

Procedure

1. From your profile menu at the top right, go to the *Download* section.
2. Download the *Add-In for Microsoft Excel*.
3. Install the add-in using the .exe file.
4. Go to ❙ *Sales* ❯ *Leads* ❙ , and click the *More* icon at the bottom right.
5. Click *Import from Microsoft Excel*.
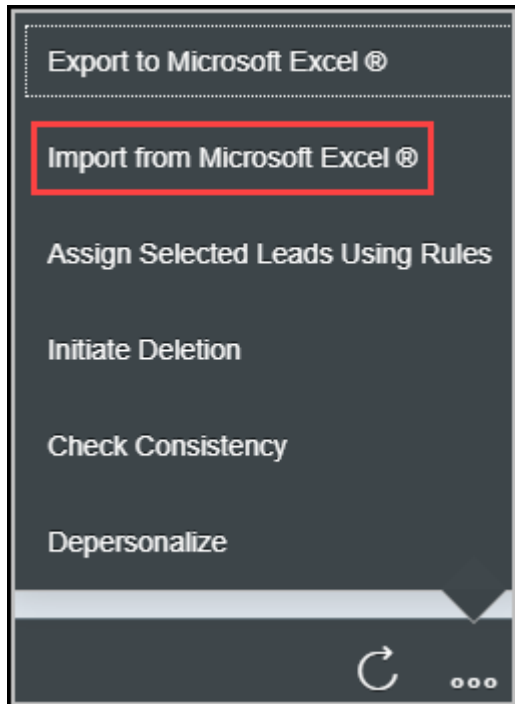
6. Open the Microsoft Excel template locally and log in with SAP Cloud for Customer credentials.

7. You can either manually type in or copy and paste your leads information from another spreadsheet.

8. If you have downloaded the add-in, saving the spreadsheet will update your leads in the solution simultaneously.

4.2.2 Use Business Card Scanner

You can create a lead on the spot using Business Card Scanner on your mobile device.

Prerequisites

Your administrators have enabled Business Card Scanner.

> **i Note**
>
> The optical character recognition license is required from ABBYY to use this feature.

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Procedure

1. Go to *Leads*, and add a new lead.
2. Tap *Actions*, choose *Scan*, and the phone camera will be activated.
3. Center the business card that you would like to scan, and take the picture.
4. If the photo is clear, tap *Use Photo*. The information in the picture will be transferred to appropriate fields in the application.
5. Confirm or adjust the information as necessary, and save the lead by tapping *Done*. The information from the business card will appear as a contact under your lead.

> → Tip
>
> If the country of your contact is not recognizable from the business card, a popup for manual input will display. The country information will be required if you intend to use SAP Data Quality Management services to cleanse and improve your data.

4.2.2.1 Configure Business Card Scanner

Administrators can enable Business Card Scanner so users can capture leads on their mobile devices.

Prerequisites

The appropriate number of licenses for business card scans are required from ABBYY, a non-SAP site at http://cloud.ocrsdk.com

> i Note
>
> Each business card scan counts as one A4 scan.

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Procedure

1. Log on to your SAP solution and go to ▌ *Administrator* ❯ *Mashup Web Services* ❯ *Business Card Scanner Service* ▌.
2. Click *Enter API Keys*.
3. Click *Show API Keys*.
4. Enter the username and password that you received from ABBYY.

5. Save your entries.

6. Back on the *Web Mashup Services* screen, select the row of *Business Card Scanner Service* and activate it.

4.2.3 Check for Lead Duplicates

Lead duplicate check is a combination of account duplicate check and lead duplicate check.

> **i Note**
>
> As prerequisites, your administrator must enable and configure both business partner duplicate check and lead duplicate check.

- Lead duplicate check during lead creation
  During lead creation, once you type in all the essential information, click *Check for Duplicates* at the bottom right, and scroll down to view the similarity check result. You see tabs that contain duplicate information for *Lead*, *Account and Contact*, and *Account*.
  Based on the duplicate check result, you can decide whether or not to create the lead. If the system finds a duplicate account, or account and contact, you can create the lead under that existing account through association.

You can also check for duplicates when performing a mass upload of leads from a spreadsheet or using A2X services, provided your administrator has enabled this functionality. After you import leads and save the changes, if any duplicate leads, accounts, or contacts exist, an error displays. This error message tells you which leads were not imported due to duplication.

- Lead duplicate check during lead conversion
  During lead conversion, a duplicate check is executed to find potential matches against accounts and contacts that already exist in the system. Select a potential match, and review its account and contact details below the duplicate check results. When you decide to convert the lead using the existing account and contact, click the check mark in the *Accept* column.
  Your administrator must *Adapt* the layout and add fields that need to be reviewed.
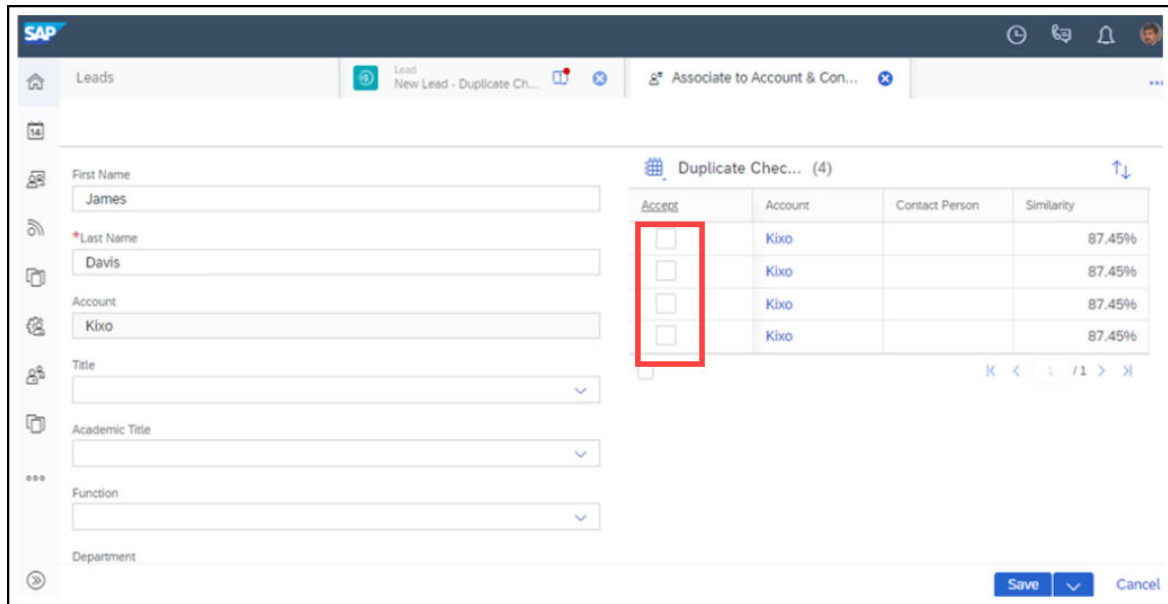
Related Information

[Account Duplicate Check [page 201]](#)

4.2.3.1 Configure Lead Duplicate Check

Administrators can enable and configure lead duplicate check in scoping and fine-tuning activities.

Context

Administrators must scope the feature before you can configure it.

Procedure

1. Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▌▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Lead Management* ❯ *Leads* ▐ to find the corresponding scoping question and enable duplicate check for leads.

2. Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▌▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Lead Duplicate Check* ▐ to configure duplicate check details.

You can assign *Weighting* to available lead fields. The higher the weightage for the field, the more importance is placed on the field when the solution finds duplicates.

You can also enable *Duplicate Check for Mass Import* for your users when they upload leads from a spreadsheet or use A2X services. You can configure the *Overall Threshold*. The threshold defines the similarity of the match, beyond which a lead will not be imported as a duplicate.

4.2.4 Assign Leads

Leads are often assigned automatically upon creation, provided the lead routing rules have been defined by your administrators. If there is no rule applicable, you own all the leads you create.

Administrators can use workflow rules to trigger automatic lead routing not only upon lead creation, but also on saving a lead or on a customized schedule. As users, you can manually add or change lead assignment details including owners, marketing units, and territories. You can also manually trigger lead routing to update exisitng lead assignments.

If you have a group of sales representatives collaborating on one lead, you can add those employees to the *Sales & Marketing Team* tab in the lead.

4.2.4.1   Manually Trigger Lead Routing

You can reassign your leads using routing rules defined by your administrators.

Context

Lead routing rules can automatically take place upon different triggers, depending on how your administrators have configured them. For existing lead assignments that need to be updated, users can follow the steps below to manually trigger lead routing.

Procedure

1. Go to the *Leads* work center.
2. Select one or multiple leads that require reassignments.
3. Click the *More* option from bottom right, and select *Assign Selected Leads Using Rules*.

    The *Owner*, *Marketing Unit*, and *Territory* details under leads will be updated as a result of rules.

4.2.4.2   Configure Lead Routing Rules

Administrators can create routing rules for automatic lead assignment.

Context

Once the routing rules are defined, leads will be automatically assigned to owners, marketing units, and territories upon lead creation.

> **i Note**
>
> Territories must be enabled in scoping before it works in the lead routing.

Procedure

1. Go to ▌ *Administrator* ❯ *Sales and Campaign Settings* ❯ *Define Rules for Lead Assignment* ▐ to launch the rules table.

2. If it is your first time to create rules, use *Adapt Columns* to set up the rules table. You can have up to 20 columns in the table, including last three result columns, *Owner*, *Marketing Unit*, and *Territory*.

   > **→ Tip**
   >
   > We recommend that you remove any unwanted columns and only keep required ones as extra columns can impact performance.

3. Choose *Insert Row* above the rules table. A new row with an asterisk in each field will be added to the table.

   You can add values to more than one field in a row. The fields in one row evaluate as a logical **AND** relationship, which means the field values must all evaluate to true in order for the rule to evaluate to true.

4. Click the asterisk symbol in a cell to enter a value for that field. The rules table offers a variety of logical operators to define your values.

   > **→ Tip**
   >
   > We recommend that you take full advantage of operators to consolidate your rules for better system performance.
   >
   > For example, if your rules determine assignments based on zip codes, you can use the *Between* operator to set up a range of zip codes in sequence, or you can use the *Include* operator to group zip codes that have the same prefix.

5. Continue to add rows for each desired result.

   The rows in the rules table evaluate as a logical **OR** relationship. The system will compare each rule from top to bottom until it finds one match, which suggests that the most specific rule should be placed at the top of the table and generic ones should be near the bottom.

   You can rearrange rows by selecting the row and clicking *Swap*.

6. Click *Save* when you finish.

7. Click *Activate Rules*.

   For your updated rules, unless you reactivate them, otherwise the previous rule sets will continue to execute.

4.2.4.3 Configure Lead Routing to Territories

Administrators must enable lead routing to territories before using it in lead routing rules.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* ◀. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Sales* 〉 *Lead Management* 〉 *Leads* ◀ to find the corresponding question and enable assigning leads to territories.

> → Remember
>
> You can see the *Territory* column in the lead routing rules table, regardless of scoping. However, the lead routing rules will not assign your leads to territories until you enable it.

4.2.4.4 Configure Automatic Lead Routing Triggers

Administrators can define when automatic lead routing needs to be triggered using workflow rules.

Context

By default, activated lead routing rules automatically execute upon lead creation. By using workflow rules, administrators can also set up the solution to run lead routing on saving a lead or on a customized schedule.

Procedure

1. Go to ▶ *Administrator* 〉 *Workflow Rules* ◀, and create a new workflow rule.
2. Give a meaningful name in the *Description* field.
3. For *Business Object*, choose *Leads*.
4. For the *Timing* type, you can choose from *On Create Only*, *On Every Save*, and *Scheduled*. If the timing field is left blank, *On Every Save* will be applied by default.

   This selection decides when your rule, in this case *Assign Leads Using Rules*, will be triggered.
5. (Optional) Define conditions which you can also configure in the routing rules table.
6. For *Rule Type*, choose *Action* and select *Assign Leads Using Rules*.

7. Review and activate your workflow rule.

4.2.4.5 Configure Lead Routing for Local Administrators

Local administrators can be assigned to geographical areas for which they can create rules.

Context

Only administrators with global access rights can create and edit lead routing restrictions for local administrators.

Procedure

1. Go to ▌▶ *Administrator* ❯ *Sales and Campaign Settings* ❯ *Define Rules for Lead Assignment* ▌ to launch the rules table.
2. Choose *Add Row* under the *Local Administrators Restrictions* section.
3. Enter a *Country* and *Region* to allow for rule creation.
4. Choose a local administrator for that country and region.
5. Continue to add rows for each local administrator you want to assign.
6. Click *Save*.

4.2.4.6 Create and Assign New Primary Contacts in Leads

From a lead, you can go to contact person value help to create and assign a new contact for the lead. The *New Contact* action is visible without additional configuration.

4.3 Nurture Leads

Lead nurturing is the process of developing relationships with your buyers through every step of their journeys. It focuses communication efforts on listening to the needs of your prospects, providing right information, and responding to their needs.

The solution provides five pre-delivered statuses to help you identify where your contacts and companies are in the sales pipeline.

Lead qualification is a process where you figure out what your prospects need and how likely they will purchase your products or services.

Business partners can be automatically assigned with party roles and designated as involved parties to leads, provided your administrators have activated such party roles and maintained party determination steps in involved parties configuration. As users, you can also manually add involved parties to your leads.

You may have mandatory or voluntary activity plans such as surveys and tasks predefined and assigned by your administrators to help you qualify your leads.

You can create leads with references to previously sold products or services. Those references can help qualify leads in senarios such as cross, up, and down selling, and offering renewal services.

Lead scoring is a method used to rank your leads and help you identify most valuable prospects.

The deal finder offers a predictively scored, ranked list of incoming leads based on their likelihood of conversion, which helps you decide the order in which to enagage your prospects.

With LinkedIn Sales Navigator enabled by your administrators, you can look up publicly available LinkedIn profile information about accounts or contacts, and nurture your prospects through networking.

4.3.1 Lead Statuses

The solution provides five pre-delivered statuses to help you identify where your contacts and companies are in the sales pipeline.

- *Open*: The initial status is set to open upon lead creation.
- *Qualified*: The status will automatically change to qualified when a *Qualification Level* is set. You can also manually change the status to qualified.
- *Accepted* or *Declined*: The statuses are available when a lead is in a qualified status.
- *Converted*: The status will automatically change to converted when a lead is converted to an opportunity, or an account and contact. Users cannot manually change the status to converted. As converted represents the final stage within the lifecycle of a lead, no further modification or conversion action will be allowed after a lead is converted. Users cannot reopen a converted lead.

You may need to specify a reason to indicate why a status has been set, depending on how your administrators have configured it.

4.3.1.1 Configure Status

Administrators can customize lead statuses and define conversion actions for each status.

Context

You can edit statuses by adding and deleting rows.

Procedure

1. Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◀. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Leads* ❯ *Status* ❯ *Maintain Status* ◀.
2. Click *Add Row* to create a new status.
3. Enter a number as *Sort Sequence*. It determines where the new status appears in the drop-down list of your lead status and has no influence on how leads are processed.
4. Specify the *Status Code*. Customized status codes must begin with the identifier *Z*.
5. Select an *Internal Status* in which your new status will be active. A customized status should always be connected to a pre-delivered status and follow the internal logic that particular status represents.
6. Give a name to your new status in the *Description* field.
7. Decide whether your new status should be the initial status for newly created leads.

   > **i Note**
   >
   > Only one status can be set as *Initial Status*.
   >
   > Statuses connected to *Converted*, *Accepted*, or *Declined* cannot be set as *Initial Status*.

8. Check *Active* to make the status visible for your users.
9. Decide which conversion actions should be available for leads that attain this new status.
10. Decide whether the lead with this new status can be submitted for approval.

    > **i Note**
    >
    > You cannot delete a pre-delivered status, but you can deselect the *Active* checkbox. In response, the status will no longer appear, and users cannot search for leads with this status. However, leads that are assigned to this status will continue to display it.
    >
    > You can remove a customized status only when it is not in use in the application.

4.3.1.2 Configure Reasons

Administrators can maintain reasons that specify why a status has been set.

Go to ▐▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▐▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Leads* ❭ *Reasons* ❭ *Maintain Reasons* ❭ to edit your reasons.

4.3.1.3 Configure Assignment of Reasons

Administrators can activate reasons for applicable lead statuses via assignment.

Go to ▐▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▐▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Leads* ❭ *Assignment of Reasons* ❭ *Assign Reasons* ❭ to assign your reasons.

4.3.1.4 Configure Reopening of Accepted or Declined Leads

Administrators can enable users to reopen accepted or declined leads through configuration.

Go to ▐▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▐▶ *Edit Project Scope* ❭ *Questions* ❭ *Sales* ❭ *Lead Management* ❭ *Leads* ❭ to find the corresponding scoping question.

4.3.1.5 Configure Decoupling Lead Status and Qualification Level

Administrators can set up the solution to retain the current lead status when a qualification level is set.

Go to ▐▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▐▶ *Edit Project Scope* ❭ *Questions* ❭ *Sales* ❭ *Lead Management* ❭ *Leads* ❭ to find the corresponding scoping question and decouple lead status and qualification level.

4.3.2 Qualify Leads

Lead qualification is a process where you figure out what your prospects need and how likely they will purchase your products or services.

The *Qualification Level* reflects whether a lead is hot, warm, or cold.

4.3.2.1 Configure Qualifications

Administrators can maintain qualifications that classify leads in terms of how promising they are for your business.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ▶. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Leads* ❯ *Qualifications* ❯ *Maintain Qualifications* ▶ to edit your qualifications.

4.3.2.2 Configure Decoupling Lead Status and Qualification Level

Administrators can set up the solution to retain the current lead status when a qualification level is set.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Lead Management* ❯ *Leads* ▶ to find the corresponding scoping question and decouple lead status and qualification level.

4.3.3 Add Involved Parties to Leads

Business partners can be automatically assigned with party roles and designated as involved parties to leads, provided your administrators have activated such party roles and maintained party determination steps in involved parties configuration. As users, you can also manually add involved parties to your leads.

In leads, you can manually maintain involved parties under corresponding tabs. If you collaborate with the marketing department or multiple sales colleagues on one lead, you can include those employees under the *Sales & Marketing Team* tab. Contacts can be identified under the *Contacts* tab. Other partners can be added to the *Involved Parties* tab.

You can analyze party determination details by clicking ▶ *Actions* ❯ *Check Party Determination* ▶. This feature is available on both quick create and overview screens. Administrators must enable the action via adaptation.

> → Tip
>
> To add the action to the quick create screen, administrators must turn on the adaptation mode, click the navigation arrow and go to ▶ *UI View Area* ❯ *New Lead* ❯ *Toolbar* ❯ *Lead Button Group* ❯ *Actions* ❯ *Menu* ❯ *Check Party Determination* ▶, and unhide the item.

4.3.3.1 Configure Involved Parties

Administrators can maintain involved parties for leads by assigning party roles and using determination rules.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ▶. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Leads* ❯ *Involved Parties* ❯ *Maintain Involved Parties* ▶ to edit your involved parties.

In addition, you can assign at most three custom party roles to the user interface and enable sales reps to directly edit those roles in lead quick create or overview. Those custom party roles can also show up on the lead conversion screen and be carried over to opportunities converted from the lead. This feature is only available online.

4.3.4 Add Qualification Activities to Leads

You may have mandatory or voluntary activity plans such as surveys and tasks predefined and assigned by your administrators to help you qualify your leads.

In the *Activity Planner* work center, your administrators can enable automatic assignment for activity plans during creation and define routing rules.

For activity plans that can be automatically assigned, you can manually trigger routing by refreshing to obtain most current surveys or tasks. Also, your administrators can use workflow rules to define when the routing rules can be executed automatically.

For activity plans that cannot be automatically assigned, you can manually add applicable surveys under the *Surveys* tab and tasks under the *Activities* tab in a lead.

Related Information

Activity Planning and Routing [page 704]
Workflows [page 148]

4.3.4.1 Update To-Do Surveys or Tasks by Refreshing

You can obtain most current surveys and tasks assigned to your lead by refreshing.

Prerequisites

Your administrators have defined activity plans and routing rules in the *Activity Planner* work center.

> **i Note**
>
> For each survey or task to be routed, the *Assign Automatically* option must be checked during the creation of the activity plan.

Context

Your administrators can define when applicable activity plans can be automatically assigned to leads using workflow rules. As users, you also can follow the steps below to manually trigger the routing.

Procedure

1. Go to the detail view of a lead.
2. From the *Actions* menu, select *Refresh from Activity Plan*.

Results

Your applicable surveys and tasks appear under the *Surveys* and *Activities* tabs as a result of rules.

4.3.4.2 Configure Automatic Refresh from Activity Plan

Administrators can use workflow rules to define when leads can be automatically refreshed to obtain an updated list of to-do surveys and tasks.

Context

By using workflow rules, applicable surveys and tasks can be assigned on creating or saving a lead, or on a customized schedule.

Procedure

1. Go to ▶ *Administrator* ❯ *Workflow Rules* ❯, and create a new workflow rule.
2. Give a meaningful name in the *Description* field.
3. For *Business Object*, choose *Leads*.
4. For the *Timing* type, you can choose from *On Create Only*, *On Every Save*, and *Scheduled*. If the timing field is left blank, *On Every Save* is applied by default.

   This selection decides when your rule, in this case *Refresh from Activity Plan*, is triggered.
5. (Optional) Define conditions that you can also configure in the *Routing Rules* section in the *Activity Planner* work center.

6. For *Rule Type*, choose *Action* and select *Refresh from Activity Plan*.

7. Review and activate your workflow rule.

4.3.5 Associate Leads with Registered Products

You can create leads with references to previously sold products or services. Those references can help qualify leads in senarios such as cross, up, and down selling, and offering renewal services.

Once your administrators have enabled the feature, you can add registered products to your leads, create leads from registered products, and report on leads with references to registered products.

4.3.5.1   Add Registered Products to Leads

You can link one or multiple registered products to your leads.

- During lead creation, you can select *Serial ID*, *Associated Product (Reg. Product)*, *Installation Point*, and *Installed Base* to include a registered product, and it automatically becomes the primary registered product for that lead.

  > **i Note**
  >
  > The registered product fields are only available when you create a lead using an existing account.

- In the detail view of a lead with an existing account, you can go to the *Registered Products* tab to add more registered products.
- Registered products can also be connected to a lead using web services such as A2X and OData, or via data upload using Data Workbench.

If the fields are not visible, you can use *Personalization* or ask your administrators to *Adapt* the layout.

When you convert a lead to an opportunity, the registered product information will be carried over.

4.3.5.2   Created Leads from Registered Products

You can create a lead from a registered product to increase your wallet share from an existing product.

- In the *Registered Products* work center, you can select one or multiple relevant registered products from the list, and create a *New Lead* from the *More* option at the bottom right. When the lead quick create screen opens, the registered products pane will be automatically populated with values of the highlighted registered products.
- You can also go to the detail view of a registered products by clicking its *ID* or *Serial ID*, and create a new lead under the *Leads* tab. When the lead quick create screen opens, the related fields will be automatically populated with values of that registered product.

4.3.5.3   Report on Leads with References to Registered Products

You can use the data sources below to create your reports regarding registered products, as well as installation points and installed bases.

Data Source	Description
CODMKLEAREGPRDU	Contains all the registered products of leads. It allows you to analyze related registered products of leads.
CODMKLEAREGPRDGENU	Contains all the installed objects of leads. It allows you to analyze installed objects of leads.

4.3.5.4   Configure Association of Registered Products in Leads

Administrators can enable users to create leads with references to previously sold products through configuration.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* ◼. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Sales* 〉 *Lead Management* 〉 *Leads* ◼ to find the corresponding scoping question.

4.3.5.5   Lead Copy Assigned to Installation Point/ Registered Product

A copy of a lead or a follow-up transaction also copies its assigned *installation point/registered product*.

4.3.6 Score Leads

Lead scoring is a method used to rank your leads and help you identify most valuable prospects.

The solution offers you multiple lead scoring tools.

- Survey scores
  Your administrators can assign you with surveys such as a screening checklist or a qualification questionnaire to help you better understand your leads. The survey results are measured as scores, based on which you can prioritize your prospects.
- Engagement scores

Your administrators can assign point values to different actions that are triggered during a marketing campaign. The point total is described as an engagement score, based on which you can get a better idea of how engaging and qualified your lead is.

- Lead scores
  Lead scoring uses a machine learning model that is trained on your historical sales data to find patterns and key contributors that predict the likelihood of conversion.
- Deal Finder
  The deal finder offers a predictively scored and ranked list of incoming leads based on their likelihood of conversion, which helps you decide the order in which to enagage your prospects.

Related Information

4.3.7 Work with Deal Finder

The deal finder offers a predictively scored, ranked list of incoming leads based on their likelihood of conversion, which helps you decide the order in which to enagage your prospects.

In the deal finder, depending on how your administrators have configured it, you can see queries with different topics of interest. For example, your administrators may have identified hot leads, or leads that have existing accounts, for you to review.

Leads in the deal finder are sorted according to their predictive scores. The scoring is driven by machine learning powered by SAP Leonardo, with which you can also view key factors that impact the resulting scores by clicking or tapping the cards. For leads that are qualified to be converted, you can drag and drop them directly to the opportunities column for conversion.

4.3.7.1 Configure Deal Finder

Admnistrators can enable and configure deal finder to help users identify most promising leads.

> **i Note**
>
> As a prerequisite, machine learning powered by SAP Leonardo must be enabled so that lead scores can be calculated in deal finder. For more information, see **Machine Learning in SAP Cloud for Customer** in the related information section.

Add the Deal Finder Tile to the Home Page

Administrators must add the deal finder tile to the home page to allow users with appropriate roles to access deal finder.

1. Open the home page.
2. Click the pencil icon at the bottom right and go to the *Adapt* mode.
3. Select the business role with which users will work with the deal finder and click *Go*.
4. Navigate to the *Scorecards* section.
5. Find the *Deal Finder* scorecard, and add it to the role.
6. Decide whether you want to make deal finder visible for all users with that business role.
7. Click *Publish* to save your changes for that business role.

Save Queries

Administrators must add at least one query with topics as the search parameter for users to see topics in deal finder.

1. Go to ❘ *Sales* ❭ *Leads* ❭ or ❘ *Sales Campaign* ❭ *Leads* ❭.
2. Click your profile on the top right corner of your screen, and select *Start Adaptation*.
3. Select the filter icon.
4. Enter filters parameters to refine your query result. For example, you can set *Qualification Level* as *Hot* and get a list of high qualified leads for users to review in deal finder.
5. Click *Save Query As*. ave and apply the query. The name you enter will be the name of the topic in deal finder.
6. In the pop-up box, you can give the query a name, and opt to make it your default query. The name you enter will be the name of the topic in deal finder.
7. Click *Save*. A new query is created, and it appears in your default selection drop down list.
8. Click your profile and select *End Adaptation*.

Related Information

4.3.8 Work with LinkedIn Sales Navigator

With LinkedIn Sales Navigator enabled by your administrators, you can look up publicly available LinkedIn profile information about accounts or contacts, and nurture your prospects through networking.

LinkedIn Sales Navigator iframes are embedded in the *Overview* and *Contacts* tabs in your leads, opportunities, buying center, accounts, and contacts. In the overview tab, Sales Navigator gives you information about the company. When a contact is selected, Sales Navigator shows you a profile about the person. You may see your contacts' recent activities and find a topic of interest to help you start a conversation with your prospects. Or, you may find someone you know to introduce you directly to your potential customers.

LinkedIn Sales Navigator uses basic information such as first name, last name, e-mail address, job title, and company name to find the correct company or person on LinkedIn. In case the result is not the one that you are looking for, you can further perform a search to find a match. For your contacts, the *Save as Lead* option in the iframe allows you to save the person as a lead in LinkedIn Sales Navigator. Such leads are not recorded in SAP Cloud for Customer.

To use this feature, you must allow browser cookies from LinkedIn.

- In Google Chrome, go to ▌ *Settings* 〉 *Advanced* 〉 *Privacy and security* 〉 *Content settings* 〉 *Cookies* 〉 *Allow* ▌ and add `[*.]linkedin.com`.
- In Internet Explorer, go to ▌ *Internet Options* 〉 *Security* 〉 *Trusted sites* 〉 *Sites* ▌ and add `http:// linkedin.com`.

> **i Note**
>
> You need a LinkedIn Sales Navigator Team or Enterprise account to use this feature. However, if you have previously signed in to LinkedIn with a different account on your computer, you may be automatically signed in with that account. To relogin with the standard account, you must first clear your previous browsing cookies.

4.3.8.1   Configure LinkedIn Sales Navigator

Administrators can enable LinkedIn Sales Navigator to allow users to look up publicly available LinkedIn profile information of an account or a contact.

> **i Note**
>
> A LinkedIn Sales Navigator Team or Enterprise license is required to use this feature. You can sign up for a free trial here ↗ .

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Communication and Information Exchange* ❯ *Integration with External Applications and Solutions* ❯ *Integration with LinkedIn Sales Navigator* ▶ to find the corresponding scoping question.

4.4 Convert Leads

Lead conversion happens when a lead has been qualified and you believe your prospect has an interest in doing business with you.

> **i Note**
>
> As a prerequisite, your leads must be *Consistent* before being converted. To resolve any lead inconsistency, you can *Check Consistency* for each lead to view relevant warning messages and fix the errors accordingly.

To convert a lead, go to the detail view of that lead and make a selection from the *Actions* menu at the bottom right. You can have a list of conversion options for each lead, depending on what status your lead resides in and how your administrators have configured available conversion actions for each status.

- *Convert to Opportunity*
  You can convert a lead to an opportunity when you have verified that the prospect has a good chance of becoming a customer. One lead can be converted to multiple opportunities, depending on how your administrators have configured the conversion limit.
- *Convert to Account and Contact*
  You can convert a lead to an account and contact, which means the lead can potentially be a customer yet has not been qualified to the level of an opportunity. One lead can be converted to only one account and contact, and cannot be further converted to an opportunity. When your sales process is ready to start, you can create a new opportunity using the corresponding account and contact. The same logic applies when you convert a lead to an individual customer.

Once converted, the lead remains in the system as a record and cannot be deleted. The lead status will change to *Converted*, which indicates the lead has reached its end of lifecycle and no more modifications will be allowed to the lead record. You can further process any follow-up items that arise from the lead, and changes will not reflect in the lead record.

- *Associate Account and Contact*
  Association in the context of conversion allows you to convert the lead without changing the lead status.You can keep working in the lead. Any further changes done in the lead will not affect the account and contact. The same logic applies when you associate a lead with an individual customer.

4.4.1 Create Follow-Up Items

You can create a sales quote or a sales order right from a lead with an existing account.

In a lead, go to the *Sales Quotes* or *Sales Orders* tab to add a new follow-up document, and relevant lead information will be copied over.

4.4.2 Configure Conversion Limit

Administrators can specify how many times a lead can be converted into an opportunity.

Go to ▶ *Business Configuration* ❭ *Implementation Projects* ❭ . Select your project and navigate to ▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Leads* ❭ *Maintain Conversion Limit* ❭ to specify the number of times.

4.4.3 Configure Sales Area Data for Lead Conversion

Administrators can set up the solution to keep sales area data when a lead is converted to an account, or an account and contact. Sales area data include sales organization, sales group, sales office, distribution channel, and division.

Go to ▶ *Business Configuration* ❭ *Implementation Projects* ❭ . Select your project and navigate to ▶ *Edit Project Scope* ❭ *Questions* ❭ *Sales* ❭ *Lead Management* ❭ *Leads* ❭ to find the corresponding scoping question.

4.4.4 Link Predecessor and Successor Opportunities to Converted Leads

Related Opportunities is available in *Lead* details to link opportunities to converted leads.

The following actions are available to link *Opportunities*:

- *Add Predecessor*: You can add as many predecessor opportunities as needed even after *Lead* conversion. *Lead* conversion limit does not affect the *Add Predecessor* action.
- *Add Successor*: Typically successor opportunities are a result of *Lead* conversion. You can also add successor opportunities. *Lead* conversion limit affects the *Add Successor* action.

This feature enables you to link the opportunities that are created separately or worked upon in parallel.

4.5   Leads Offline

In your solution, the following items can be used offline.

Quick Create - Field Level Availability

Section	Field	Availability Offline	Default/Determination Offline
Header General	Lead ID	Y	N
	External ID	N	N
	Name	Y	N
	Account	Y	N
	Company	Y	N
	Contact	Y	N
	Contact First Name	Y	N
	Contact Middle Name	Y	N
	Contact Last Name	Y	N
	First Name of Indiv. Customer	Y	N
	Middle Name of Indiv. Customer	Y	N
	Last Name of Indiv. Customer	Y	N
	Qualification Level	Y	N
	Status	Y	Y
	Consistency Status	N	N
	Source	Y	N
	Priority	Y	Y
	Start Date	Y	Y
	End Date	Y	Y
	Category	Y	N

Section	Field	Availability Offline	Default/Determination Offline
	Owner	Y	Y
	Owner(Sales)	Y	N
	Marketing Unit	Y	N
	Sales Unit	Y	Y
	Sales Organization	Y	Y
	Distribution Channel	Y	Y
	Division	Y	Y
	Survey Score	N	N
	Created On	N	N
	Created By	N	N
	Changed On	N	N
	Changed By	N	N
	Notes	Y	N
	Sales Territory ID	Y	N
	Sales Territory Name	Y	N
Header Account Information	Additional Name	Y	N
	Additional Name 2	Y	N
	Additional Name 3	Y	N
	External System	N	N
	External ID	N	N
	House Number	Y	N
	Address Line 1	Y	N
	Address Line 2	Y	N
	Street	Y	N
	Address Line 4	Y	N

Section	Field	Availability Offline	Default/Determination Off-line
	Address Line 5	Y	N
	City	Y	N
	Country	Y	N
	State	Y	N
	P.O.Box	Y	N
	Postal Code	Y	N
	County	Y	N
	Phone	Y	N
	Fax	Y	N
	Mobile	Y	N
	E-Mail	Y	N
	Web Site	Y	N
	Latitude	Y	N
	Longtitude	Y	N
	Legal Form	Y	N
	ABC Classification	Y	N
	Industry	Y	N
	D-U-N-S	Y	N
	Contact Permission	Y	N
	Language	Y	N
	Note	Y	N
Header Contact Information	Title	Y	N
	Job Title	Y	N
	Academic Title	Y	N
	Additional Academic Title	Y	N

Section	Field	Availability Offline	Default/Determination Offline
	Nickname	Y	N
	External System	N	N
	External ID	N	N
	Language	Y	N
	Gender	Y	N
	Maritcal Status	Y	N
	Function	Y	N
	Department	Y	N
	Department from Business Card	Y	N
	VIP Contact	Y	N
	Contact Permission	Y	N
	Engagement Score	Y	N
	Building	Y	N
	Floor	Y	N
	Room	Y	N
	Phone	Y	N
	Fax	Y	N
	Mobile	Y	N
	E-Mail	Y	N
	E-Mail Invalid	Y	N
	Note	Y	N
Header Individual Customer Information	ABC Classification	Y	N
	Gender	Y	N
	Maritcal Status	Y	N
	E-Mail	Y	N

Section	Field	Availability Offline	Default/Determination Offline
	Phone	Y	N
	Fax	Y	N
	Mobile	Y	N
	House Number	Y	N
	Street	Y	N
	City	Y	N
	Country	Y	N
	State	Y	N
	Postal Code	Y	N
	Nationality	Y	N
	Date of Birth	Y	N
	Title	Y	N
	Academic Title	Y	N
	Profession	Y	N
	Contact Permission	Y	N
	Language	Y	N
	Initials	Y	N
	Best Reached By	Y	N
	Prefix	Y	N
Products	Product	N	N
	Description	N	N
	Category	N	Y
	Quantity	N	N

Detailed View - Field Level Availability

Tab	Section	Field	Display	Edit (directly OR via actions OR via navigation)
Overview	Header General	Lead ID	Y	N
		External ID	N	N
		Name	Y	Y
		Account	Y	Y
		Company	Y	Y
		Contact	Y	Y
		Contact First Name	Y	Y
		Contact Middle Name	Y	Y
		Contact Last Name	Y	Y
		First Name of Indiv. Customer	Y	Y
		Middle Name of Indiv. Customer	Y	Y
		Last Name of Indiv. Customer	Y	Y
		Qualification Level	Y	Y
		Status	Y	Y
		Consistency Status	Y	N
		Source	Y	Y
		Priority	Y	Y
		Start Date	Y	Y
		End Date	Y	Y
		Category	Y	Y
		Owner	Y	Y
		Owner(Sales)	Y	Y
		Marketing Unit	Y	Y

Tab	Section	Field	Display	Edit (directly OR via actions OR via navigation)
		Sales Unit	Y	Y
		Sales Organization	Y	Y
		Distribution Channel	Y	Y
		Division	Y	Y
		Survey Score	Y	N
		Created On	Y	N
		Created By	Y	N
		Changed On	Y	N
		Changed By	Y	N
		Notes	Y	Y
		Sales Territory ID	Y	Y
		Sales Territory Name	Y	N
	Header Account Information	Additional Name	Y	Y
		Additional Name 2	Y	Y
		Additional Name 3	Y	Y
		External System	N	N
		External ID	Y	N
		House Number	Y	Y
		Address Line 1	Y	Y
		Address Line 2	Y	Y
		Street	Y	Y
		Address Line 4	Y	Y
		Address Line 5	Y	Y
		City	Y	Y
		Country	Y	Y

Tab	Section	Field	Display	Edit (directly OR via actions OR via navigation)
		State	Y	Y
		P.O.Box	Y	Y
		Postal Code	Y	Y
		County	Y	Y
		Phone	Y	Y
		Fax	Y	Y
		Mobile	Y	Y
		E-Mail	Y	Y
		Web Site	Y	Y
		Latitude	Y	Y
		Longtitude	Y	Y
		Legal Form	Y	Y
		ABC Classification	Y	Y
		Industry	Y	Y
		D-U-N-S	Y	Y
		Contact Permission	Y	Y
		Language	Y	Y
		Note	Y	Y
	Header Contact Information	Title	Y	Y
		Job Title	Y	Y
		Academic Title	Y	Y
		Additional Academic Title	Y	Y
		Nickname	Y	Y
		External System	N	N

Tab	Section	Field	Display	Edit (directly OR via actions OR via navigation)
		External ID	N	N
		Language	Y	Y
		Gender	Y	Y
		Maritcal Status	Y	Y
		Function	Y	Y
		Department	Y	Y
		Department from Business Card	Y	Y
		VIP Contact	Y	Y
		Contact Permission	Y	Y
		Engagement Score	Y	Y
		Building	Y	Y
		Floor	Y	Y
		Room	Y	Y
		Phone	Y	Y
		Fax	Y	Y
		Mobile	Y	Y
		E-Mail	Y	Y
		House Number	Y	N
		Street	Y	N
		City	Y	N
		Country	Y	N
		State	Y	N
		Postal Code	Y	N
		Note	Y	Y

Tab	Section	Field	Display	Edit (directly OR via actions OR via navigation)
	Header Individual Customer Information	ABC Classification	Y	Y
		Gender	Y	Y
		Maritcal Status	Y	Y
		E-Mail	Y	Y
		Phone	Y	Y
		Fax	Y	Y
		Mobile	Y	Y
		House Number	Y	Y
		Street	Y	Y
		City	Y	Y
		Country	Y	Y
		State	Y	Y
		Postal Code	Y	Y
		Nationality	Y	Y
		Date of Birth	Y	Y
		Customer ID	Y	N
		External System	N	N
		External ID	N	N
		Title	Y	Y
		Academic Title	Y	Y
		Profession	Y	Y
		Contact Permission	Y	Y
		Language	Y	Y
		Initials	Y	Y
		Best Reached By	Y	Y

Tab	Section	Field	Display	Edit (directly OR via actions OR via navigation)
		Prefix	Y	Y
	Products	Product	Y	N
		Description	Y	N
		Category	Y	N
		Quantity	Y	N
Products	Products	Product	Y	Y
		Product ID	Y	N
		Description	Y	Y
		Product Category	Y	N
		Category	Y	N
		Quantity	Y	Y
		External System	N	N
		External ID	N	N
Activities	Appointments	Subject	Y	N
		Status	Y	N
		Category	Y	N
		Start Date/Time	Y	N
		End Date/Time	Y	N
		All Day Event	Y	N
		Owner	Y	N
		Organizer	Y	N
	Visits	Subject	Y	N
		Status	Y	N
		Category	Y	N
		Start Date/Time	Y	N

Tab	Section	Field	Display	Edit (directly OR via actions OR via navigation)
		End Date/Time	Y	N
		All Day Event	Y	N
		Owner	Y	N
	Emails	Subject	Y	N
		Status	Y	N
		Category	Y	N
		Start Date/Time	Y	N
		Owner	Y	N
	Tasks	Subject	Y	N
		Status	Y	N
		Category	Y	N
		Start Date/Time	Y	N
		Due Date/Time	Y	N
		Owner	Y	N
		Processor	Y	N
	Phone Calls	Subject	Y	N
		Status	Y	N
		Category	Y	N
		Start Date/Time	Y	N
		Owner	Y	N
Sales & Marketing Team	Sales & Marketing Team	Role	Y	Y
		Name	Y	N
		Email	Y	N
		Phone	Y	N
		Primary	Y	Y

Tab	Section	Field	Display	Edit (directly OR via actions OR via navigation)
Contacts	Contacts	Name	Y	N
		Function	Y	N
		Department	Y	N
		Phone	Y	N
		Mobile	Y	N
		Email	Y	N
		Contact Permission	Y	N
		Primary Contact	Y	Y
Involved Parties	Involved Parties	Role	Y	N
		Name	Y	N
		E-Mail	Y	N
		Phone	Y	N
		Primary	Y	Y
		Primary Contact	Y	N
Attachments	Attachments	Title	Y	N
		Type	Y	N
		Changed On	Y	N
		Changed By	Y	N
Sales Quote	Sales Quote	Name	Y	N
		Relationship	Y	N
		External Reference	Y	N
		Status	Y	N
		Approval Status	Y	N
		Owner	Y	N
		Reason for Reject	Y	N

Tab	Section	Field	Display	Edit (directly OR via actions OR via navigation)
		Overall Discound(%)	Y	N
		Payment Terms	Y	N
		Total Revenue	Y	N
		Created On	Y	N
Tickets	Tickets	Ticket ID	Y	N
		Subject	Y	N
		Relationship	Y	N
		Priority	Y	N
		Status	Y	N
		Created On	Y	N
		Assigned To	Y	N
		Ticket Type	Y	N
Surveys	Surveys	Name	Y	Y
		Status	Y	Y
		Catgeory	Y	Y

Offline Actions

Object	Global / Tab	Actions	Offline Availability
Leads	Global	Convert to	Available only when you convert a lead to an opportunity and that lead has an existing account
		Associate to	N
		Copy	N
		Check Consistency	N
	Products	Add	Y
		Delete	Y

Object	Global / Tab	Actions	Offline Availability
	Activities	New	Available only when lead has an existing account
	Sales & Marketing Team	Add	Y
		Delete	Y
	Involved Party	Add	Y
		Delete	Y
	Contact (only when Lead using existing account)	Add	Y
		Delete	Y
	Sales Quote	New	Y
	Ticket	New	N
	Attachments	Add	Y

4.6　Leads FAQ

This section answers commonly asked questions about leads.

4.6.1　How do I convert a lead without changing its status?

Associate Account and Contact allows you to convert the lead without changing its status so you can continue working in the original lead.

When you convert a lead, the lead status will change to *Converted*, which indicates the lead has reached its end of lifecycle and no more modifications will be allowed to the lead record. If you want to keep working in the original lead, you can use *Associate Account and Contact* instead of *Convert to Account and Contact* so the lead status remains. Any further changes done in the lead will not affect the account and contact.

The same logic applies when you *Associate Individual Customer*.

4.6.2 How do I obtain tasks or surveys assigned to my leads?

You can use the *Refresh from Activity Plan* action in a lead to obtain tasks or surveys that are predefined by your administrators and assigned to your leads.

Although your administrators may have configured workflow rules to assign activity plans automatically, such assignments only take place upon specific triggers. As users, you can also trigger routing for activity plans on demand to acquire relevant tasks or surverys right away.

Related Information

Update To-Do Surveys or Tasks by Refreshing [page 273]

4.6.3 Why can't I take notes in leads in the offline mode?

The *Notes* field is currently unavailable when note history is enabled online.

4.6.4 Why is a lead assigned to a different owner than I expected?

As administrators, you need to make sure lead routing rules are defined as clearly as possible. Please remember that the system executes the rules from top to bottom. The lead will be assigned once it matches a rule, and the system will not continue reading subsequent rules.

Related Information

Configure Lead Routing Rules [page 266]

4.6.5 Why is owner not copied over when a lead is converted to an account?

We do not presume that the lead owner will be the the same as the account owner, so the solution does not take the owner information from a lead to an account.

Context

As a workaround, administrators can use workflow rules to automatically assign the owner when the user converts the lead and saves the account.

Procedure

1. Go to ▶ *Administrator* ❯ *Workflow Rules* ❯, and create a new workflow rule.
2. Give a meaningful name in the *Description* field.
3. For *Business Object*, choose *Account*.
4. For the *Timing* type, choose *On Every Save*.
5. You can skip the *Define Conditions* section.
6. For *Rule Type*, choose *Action* and select *Assign Me as Owner*.
7. Review and activate your workflow rule.

4.6.6 How do I delete a custom status in leads?

As administrators, you can delete a custom status as long as it is not in use.

You can perform a search in leads based on the custom status to see if there is any data consuming the status.

5 Opportunities

Opportunity management allows you to further nurture your qualified prospects, prioritize your potential deals to improve sales productivity, engage your customers to deliver a solution that meets their needs, and increase win rate as a result.
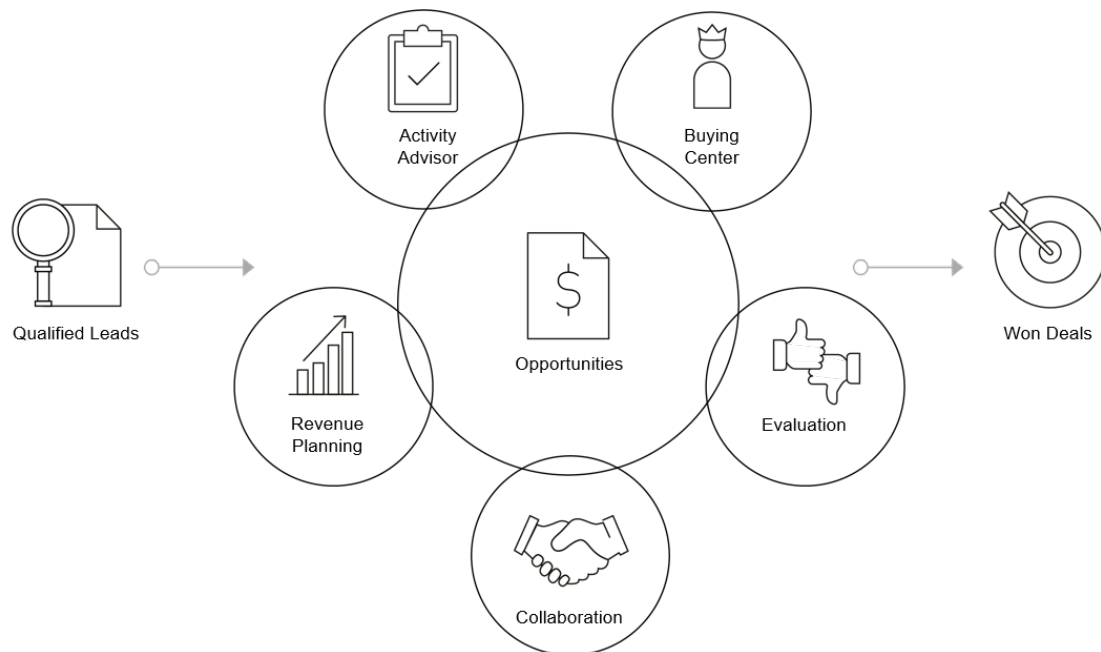
When a lead is qualified into an opportunity, it marks the start of a sales cycle. With activity advisor, SAP Cloud for Customer enables your sales representatives to perform the right set of activities at each sales phase. Following this sales methodology can save your resources on training and enhance your work efficiency as a team.

In order to construct the right proposal to win the deal, your sales representatives need to target the right messages to the right people. SAP Cloud for Customer equips you with buying center that allows you to maintain your contact relationships and identify key contacts such as decision makers and key influencers.

In the solution, you can capture all the information relevant to your opportunities, including products, partners, competitors, surveys, and so on. With such information, you can monitor your opportunities more effectively and enable better forecasting. SAP Cloud for Customer also allows you to capture different types of opportunities, such as one-time sales, ramp-up contracts, and subscription services.

In addition, you can measure your opportunities by generating estimated values, simulate your pipeline to see how your potential deals can influence your revenue total, and focus on closing opportunities that have a higher success rate, as well as help you reach your goals.

5.1   Scope and Configure Opportunities

Administrators can configure opportunities using scoping, scoping questions, and fine-tuning activities.

Scoping questions and fine-tuning activities that are self-explanatory may not be included in this list.

5.1.1 Enable Opportunities

Administrators can add opportunities to your project scope.

Go to ▮ *Business Configuration* > *Implementation Projects* ▮. Select your project and navigate to ▮ *Edit Project Scope* > *Scoping* > *Sales* > *New Business* > *Opportunities* ▮ and check the box next to the scoping item for using opportunities.

5.1.2 Configure Number Range

Administrators can specify the range of numbers that the ID of the opportunity records can take.

Go to ▮ *Business Configuration* > *Implementation Projects* ▮. Select your project and navigate to ▮ *Open Activity List* > *Fine-Tune* > *Opportunities* > *Number Range* > *Maintain Number Range* ▮ to specify the numbers.

5.1.3 Configure Involved Parties

Administrators can maintain involved parties for opportunities by activating applicable party roles and determination steps.

Go to ▮ *Business Configuration* > *Implementation Projects* ▮. Select your project and navigate to ▮ *Open Activity List* > *Fine-Tune* > *Opportunities* > *Involved Parties* > *Maintain Involved Parties* ▮ to edit your involved parties.

Based on your business needs, you can *Exclude* activated party roles from realignment run or inbound integration scenarios, for example, when you replicate opportunities from ERP to SAP Cloud for Customer.

For customized party roles, there is an additional determination step called *Use Rules for <Party Role Name>*. This option allows you to default parties based on specific conditions that can be defined in ▮ *Administrator* > *Sales and Campaign Settings* > *Define Rules for Opportunity Parties* ▮.

Related Information

Configure Automatic Party Re-Determination [page 327]

5.1.4 Configure Sources

Administrators can maintain sources that capture the origin of your opportunities.

Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Opportunities* ❯ *Sources* ❯ *Maintain Sources* ▌ to edit your sources.

5.1.5 Configure Reasons

Administrators can maintain reasons that specify why a status has been set.

Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Opportunities* ❯ *Reasons* ❯ *Maintain Reasons* ▌ to edit your reasons.

5.1.6 Configure Assignment of Reasons

Administrators can activate reasons for applicable opportunity statuses via assignment.

Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Opportunities* ❯ *Assignment of Reasons* ❯ *Assign Reasons* ▌ to assign your reasons.

5.1.7 Configure Categories

Administrators can maintain categories that classify your elements such as leads and opportunities.

Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Opportunities* ❯ *Categories* ❯ *Maintain Categories* ▌ to edit your categories.

5.1.8 Configure Assignment of Categories

Administrators can activate categories for opportunities via assignment.

Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Opportunities* ❯ *Assignment of Categories* ❯ *Assign Categories* ▌ to assign your categories.

5.1.9 Configure Document Types

Administrators can define document types that distinguish one type of opportunity from another. Different types of opportunities can go through different sales cycles.

Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▐ . Select your project and navigate to ▌▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Opportunities* ❯ *Document Types* ❯ *Maintain Document Types* ▐ to edit your opportunity types.

5.1.10 Configure Custom Status

Administrators can customize opportunity statuses that help identify where the prospects are in the sales pipeline.

Context

You must define a complete set of custom statuses with equivalence of all the five lifecycle statuses.

Procedure

1. Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▐ . Select your project and navigate to ▌▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Opportunities* ❯ *Custom Status* ❯ *Maintain Custom Status* ▐ .
2. Choose a *Document Type*.
3. Click *Add Row* to create a new status.
4. Enter a number as *Sort Sequence*. It determines where the new status appears in the drop-down list of your opportunity status and has no influence on how opportunities are processed.
5. Specify the *Status Code*. Customized status codes must begin with the identifier *Z*.
6. Decide whether your new status should be the initial status for newly created opportunities.

   > **i Note**
   >
   > Only one status can be set as *Initial Status*.

7. Check *Active* to make the status visible for your users.
8. Give a name to your new status in the *Description* field.
9. Select an *Life Cycle Status* in which your new status will be active. A customized status should always be connected to a pre-delivered status and follow the internal logic that particular status represents.
10. Decide whether the opportunity with this new status can be submitted for approval.

    > **i Note**
    >
    > You can remove a customized status only when it is not in use in the application.

5.1.11 Configure Opportunity Duplicate Check

Administrators must scope the feature before use.

1. Go to ▶ *Business Configuration* > *Implementation Projects* ◤ and select your project.
2. Go to ▶ *Edit Project Scope* > *Questions* > *Sales* > *New Business* > *Opportunities* ◤ and select scoping question *Do you want to enable duplicate check for opportunity?*
3. To configure it, go to ▶ *Business Configuration* > *Implementation Projects* ◤ and select your project.
4. Go to ▶ *Open Activity List* > *Fine-Tune* > *Opportunity Duplicate Check* ◤.

You can assign *Weighting* to available opportunity fields. The higher the weightage for the field, the more importance is placed on the field when the solution finds duplicates.

5.1.12 Configure Activity Timeline

Administrators can include activities in a timeline view so users can have an intuitive idea about when the items need to be performed.

Go to ▶ *Business Configuration* > *Implementation Projects* ◤. Select your project and navigate to ▶ *Open Activity List* > *Fine-Tune* > *Opportunities* > *Activity Timeline* > *Maintain Timeline* ◤ to activate activities.

Activities checked as *Internal* are shown below the timeline, whereas external activities are displayed above the line.

5.1.13 Configure System Message Severity

Administrators can upgrade or downgrade the severity level of system messages in opportunities.

Go to ▶ *Business Configuration* > *Implementation Projects* ◤. Select your project and navigate to ▶ *Open Activity List* > *Fine-Tune* > *Opportunities* > *Messages* > *Message Severity Configuration* ◤ to edit message severity.

> **i Note**
>
> As administrators, you can suggest mandatory activities via activity advisor. When such activities are not added to an opportunity, system messages can be displayed. You can further upgrade the severity level of **both** messages *CL_CDA_ACTASST* (Message ID: 001) and *CL_CDA_ACTASST* (Message ID: 010) from warning to error, putting the opportunity into an inconsistent status. An inconsistent opportunity cannot be converted into a sales quote or sales order.

Message severity configuration for *Opportunities* allow the user to disable the check of 100% splits in revenue and suppress, for example, the maintenance of revenue partner.

5.1.14 Configure Multi-Step Approval Process

Administrators can enable a multi-step approval process for opportunities through configuration.

Go to ▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▶ *Edit Project Scope* ❭ *Questions* ❭ *Sales* ❭ *New Business* ❭ *Opportunities* ❭ to find the corresponding scoping question about enabling multi-step approval process.

Upon activation, you can further configure process details in ▶ *Administrator* ❭ *Approval Processes* ❭.

5.1.15 Configure Automatic Submission for Approval

Administrators can set up the solution to automatically submit opportunities for approval when the opportunities have fulfilled predefined conditions.

Go to ▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▶ *Edit Project Scope* ❭ *Questions* ❭ *Sales* ❭ *New Business* ❭ *Opportunities* ❭ to find the corresponding scoping question about automatically submitting opportunities for approval.

5.1.16 Configure Resetting Approval Status in Approved Opportunities

Administrators can enable users to restart approval process on changes to approval relevant fields in an approved opportunity.

Go to ▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▶ *Edit Project Scope* ❭ *Questions* ❭ *Sales* ❭ *New Business* ❭ *Opportunities* ❭ to find the corresponding question about enabling reapproval for approved opportunities.

> ! Restriction
>
> If any of the following account fields are defined as approval conditions, changes to them in an approved opportunity do **not** lead to resetting the approval status.
>
> - ABC Classification
> - Industry
> - Prospect
> - All the custom extension fields defined in accounts

5.1.17 Configure Influencer Map

Administrators can enable an influencer map so users can see top influencial contacts and employees around a contact.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* 〉. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Sales* 〉 *New Business* 〉 *Opportunities* 〉 to find the corresponding scoping question about enabling the influencer map.

Once you have checked the scoping question, you can *Adapt* the master layout and add *Top Influencers* as a new field to *Contacts* and *Sales Team*, as well as the corresponding panes under the *Overview* tab.

If you want to customize any labels for the influencer map, you can go to ▶ *Administrator* 〉 *Sales and Campaign Settings* 〉 *Influencer Map* 〉 and adapt the master layout there.

5.1.18 Configure Enablement of Opportunity Historical Analysis

Administrators can set up the solution to start capturing opportunity values and major changes so users can check opportunity progression in data source over time.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* 〉. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Sales* 〉 *New Business* 〉 *Opportunities* 〉 to find the corresponding question about enabling historical analysis for opportunities.

> **i** Note
>
> The information tracked in the data source contains more details than the standard change history seen under the *Changes* tab in an opportunity. You can use the opportunity history data source *CODOPPHHB* to create a report in *Business Analytics* and gain insights into the opportunity lifecycle.

5.1.19 Configure Note History Viewing and Editing

Administrators can enable users to see and change earlier versions of opportunity notes through configuration.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* 〉. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Sales* 〉 *New Business* 〉 *Opportunities* 〉 to find the two corresponding questions about viewing and editing opportunity note history.

5.1.20 Configure Automatic Party Re-Determination

Administrators can set up the solution to automatically re-determine opportunity parties when a change is made to the associated account team or territory team.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❚. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *New Business* ❯ *Opportunities* ❚ to find the corresponding question about opportunity party re-determination.

When party re-determination is triggered, a background job that runs every eight minutes will go through *Open* or *In Process* opportunities and realign all the parties in those opportunities.

> ⓘ Note
>
> If you don't want certain party roles to be re-determined, you can *Exclude* those party roles from realignment in involved parties configuration.
>
> Opportunities that are *In Approval* are also excluded from party re-determination.

Related Information

Configure Involved Parties [page 349]

5.1.21 Configure Sales Phase Progress

Administrators can enable the *Progress* field in an opportunity and remind employees to take actions when the sales progress is *Slow* or *Stalled* instead of *On Track*.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❚. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *New Business* ❯ *Opportunities* ❚ to find the corresponding question about enabling phase progress.

When an opportunity remains in the same sales phase for a certain number of days, its progress can be considered as slow or stalled instead of on track. During sales cycles and phases configuration, administrators can specify the maximum days for an opportunity to be considered as *On Track* before the system moves the progress to *Slow* and then *Stalled*.

Related Information

Configure Sales Cycles and Phases [page 333]

5.1.22 Configure Inclusion of Products During Opportunity Creation

Administration can enable users to add relevant products during opportunity creation through configuration.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *New Business* ❯ *Opportunities* ▶ to find the corresponding question about adding products during opportunity creation.

5.1.23 Configure Association of Registered Products in Opportunities

Administrators can enable users to create opportunities with references to previously sold products through configuration.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *New Business* ❯ *Opportunities* ▶ to find the corresponding question about capturing registered products in opportunities.

5.1.24 Configure Revenue Scheduling

Administrators can enable users to schedule revenue on a monthly, quarterly, or yearly basis through configuration.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *New Business* ❯ *Opportunities* ▶ to find the corresponding question about revenue scheduling.

5.1.25 Configure Revenue Splits

Administrators can enable users to split revenue per opportunity among sales team members through configuration.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *New Business* ❯ *Opportunities* ▶ to find the corresponding question about splitting revenue among sales team members.

5.1.26 Configure Total Negotiated Value for Standard and Custom Status

To control *Total Negotiated Value* for standard status, follow these steps:

1. Navigate to ▮▶ *Business Configuration* ❭ *Implementation Projects* ❭ and select your project.
2. Click ▮▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Opportunities* ❭ *Maintain Reasons* ❭ and check the column *Reduce Total Negotiated Value*.

To control *Total Negotiated Value* for custom status, follow these steps:

1. Navigate to ▮▶ *Business Configuration* ❭ *Implementation Projects* ❭ and select your project.
2. Click ▮▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Opportunities* ❭ *Maintain Custom Status* ❭ and check the column *Reduce Total Negotiated Value*.

5.1.27 Configure Product Quantity Scheduling

Administrators can enable revenue scheduling by item quantity distribution and set up the solution to automatically update the revenue schedule when there is a change in the quantity schedule.

Go to ▮▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▮▶ *Edit Project Scope* ❭ *Questions* ❭ *Sales* ❭ *New Business* ❭ *Opportunities* ❭ to find the two corresponding questions about quantity scheduling.

> **i Note**
>
> Changing in the revenue schedule does not have an impact on the quantity schedule.

5.1.28 Configure Selection of Sales Area Data Combinations

Administrators can enable users to select a combination of sales area data including sales organization, distribution channel, and division during opportunity creation. The combinations need to be predefined in either or both of the matching account and employee in the *Accounts* and *Employees* work centers.

Go to ▮▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▮▶ *Edit Project Scope* ❭ *Questions* ❭ *Sales* ❭ *New Business* ❭ *Opportunities* ❭ to find the corresponding question about sales area determination during opportunity creation.

5.1.29 Configure Default Sales Area Data During Opportunity Creation

Administrators can set up the solution to pre-populate sales area data including sales organization, distribution channel, and division during opportunity creation. The default values need to be predefined in either or both of the matching account and employee in the *Accounts* and *Employees* work centers.

Go to ▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▶ *Edit Project Scope* ❭ *Questions* ❭ *Sales* ❭ *New Business* ❭ *Opportunities* ❭ to find the corresponding question about defaulting sales area data during opportunity creation.

5.1.30 Configure Reason Selection for Status Updated from the Opportunity List

Administrators can enable users to select a reason for a standard status change they make directly from the opportunity list.

> **i Note**
>
> Feature enablement is only required for opportunities using standard statuses. Standard status actions include *Set as Open*, *Set as In Process*, *Set as Won*, *Set as Lost*, and *Set as Stopped*. For opportunities using custom status, this feature is supported by default.

Go to ▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▶ *Edit Project Scope* ❭ *Questions* ❭ *Sales* ❭ *New Business* ❭ *Opportunities* ❭ and check the scoping question about enabling reason selection.

5.1.31 Configure Activity Advisor

Administrators can enable a sales assistant with a list of proposed activities to guide sales representatives through each sales phase of an opportunity.

Context

Administrators can enable and configure activity advisor in scoping and fine-tuning activities.

Procedure

1. Go to ▶ *Business Configuration* > *Implementation Projects* ◗. Select your project and navigate to ▶ *Edit Project Scope* > *Questions* > *Sales* > *New Business* > *Opportunities* ◗ to find the corresponding question and enable the sales assistant.

2. Go to ▶ *Business Configuration* > *Implementation Projects* ◗. Select your project and navigate to ▶ *Open Activity List* > *Fine-Tune* > *Sales Assistant* > *Maintain Activities* ◗ to define suggested activities.

3. Go to ▶ *Business Configuration* > *Implementation Projects* ◗. Select your project and navigate to ▶ *Open Activity List* > *Fine-Tune* > *Sales Assistant* > *Assign Activities to Sales Phases* ◗ to assign predefined activities to specific sales phases.

5.1.32 Configure Sales Cycles and Phases

Administrators can customize sales cycles and phases for each opportunity type through configuration.

Context

Different types of opportunities can go through different sales cycles and phases.

Procedure

1. Go to ▶ *Business Configuration* > *Implementation Projects* ◗. Select your project and navigate to ▶ *Open Activity List* > *Fine-Tune* > *Sales Cycles and Phases* ◗.
2. Define *Sales Phases* according to your business needs.
3. Define *Analysis Phases* for company-wide reporting.
4. Click *Maintain Sales Cycles* to define cycles for different opportunity types, assign sales phases to each sales cycle, and assign corresponding analysis phase to each sales phase.

   If an opportunity remains in one phase for certain days without any updates, it can be considered as slow and stalled in progress. You can specify the number of the days in sales cycle configuration.

   The probability of closing a deal can increase when an opportunity reaches certain sales phases. You can also specify the chance of success for each phase in sales cycle configuration.

5. Click *Specify Default Sales Cycle* to select one sales cycle as default for your opportunities.

Related Information

Configure Sales Phase Progress [page 333]

5.1.33 Configure Stalled Opportunity Notifications

Administrators can define system notification details for a stalled opportunity through configuration.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Business Task Management for Stalled Opportunities* ❯ to edit the notification task.

5.1.34 Configure Party Determination Rules for Opportunities

Administrators can create rules for automatic party determination in opportunities.

Prerequisites

> **i Note**
>
> Rule-based determination is only available for customized party roles.

Administrators must activate desired party roles and a determination step called *Use Rules for <Party Role Name>* in involved parties configuration. Otherwise, those party roles will not be available for selection in the rule table, and previous relevant rules will no longer take place.

Context

If activated, the determination rules can be triggered upon opportunity creation and anytime users make a change to an opportunity field that is part of the rule conditions. Once the determination rules are triggered, affected business partners will be automatically assigned with specified party roles and designated as involved parties to opportunities that fulfill the predefined criteria.

Procedure

1. Go to ▶ *Administrator* ❯ *Sales and Campaign Settings* ❯ *Define Rules for Opportunity Parties* ❯ to launch the rules table.
2. If it is your first time to create rules, use *Adapt Columns* to set up the rules table. You can have up to 20 columns in the table, including last two result columns, *Party ID* and *Party Role*.

> **→ Tip**
>
> We recommend that you remove any unwanted columns and only keep required ones as extra columns can impact system performance.

3. Choose *Insert Row* above the rules table. A new row with an asterisk in each field will be added to the table.

   You can add values to more than one field in a row. The fields in one row evaluate as a logical **AND** relationship, which means the field values must all evaluate to true in order for the rule to evaluate to true.

4. Click the asterisk symbol in a cell to enter a value for that field. The rules table offers a variety of logical operators to define your values.

   > → Tip
   >
   > We recommend that you take full advantage of operators to consolidate your rules for better system performance.
   >
   > For example, if your rules determine assignments based on zip codes, you can use the *Between* operator to set up a range of zip codes in sequence, or you can use the *Include* operator to group zip codes that have the same prefix.

5. Continue to add rows for each desired result.

   The rows in the rules table evaluate as a logical **OR** relationship. The system will compare each rule from top to bottom until it finds one match, which suggests that the most specific rule should be placed at the top of the table and generic ones should be near the bottom.

   You can rearrange rows by selecting the row and clicking *Swap*.

6. Click *Save* when you finish.

7. Click *Activate Rules*.

   For your updated rules, unless you reactivate them, otherwise the previous rule sets will continue to execute.

Related Information

5.1.35 Configure Automatic Refresh from Activity Plan

Administrators can use workflow rules to define when opportunities can be automatically refreshed to obtain an updated list of to-do surveys, tasks, appointments, and phone calls.

Context

By using workflow rules, applicable surveys and activities can be assigned on creating or saving an opportunity, or on a customized schedule.

Procedure

1. Go to ▌▶ *Administrator* ❯ *Workflow Rules* ◗, and create a new workflow rule.
2. Give a meaningful name in the *Description* field.
3. For *Business Object*, choose *Opportunity*.
4. For the *Timing* type, you can choose from *On Create Only*, *On Every Save*, and *Scheduled*. If the timing field is left blank, *On Every Save* is applied by default.

   This selection decides when your rule, in this case *Refresh from Activity Plan*, is triggered.
5. (Optional) Define conditions that you can also configure in the *Routing Rules* section in the *Activity Planner* work center.
6. For *Rule Type*, choose *Action* and select *Refresh from Activity Plan*.
7. Review and activate your workflow rule.

5.1.36 Configure Contact Roles

Administrators can define roles that classify different contacts, and assign roles with respective colors that display in the buying center.

Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ◗. Select your project and navigate to ▌▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Opportunities* ❯ *Contact Roles* ❯ *Maintain Contact Roles* ◗ to edit your contact roles.

5.1.37 Configure LinkedIn Sales Navigator

Administrators can enable LinkedIn Sales Navigator to allow users to look up publicly available LinkedIn profile information of an account or a contact.

> **i Note**
>
> A LinkedIn Sales Navigator Team or Enterprise license is required to use this feature. You can sign up for a free trial here ↗ .

Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ◗. Select your project and navigate to ▌▶ *Edit Project Scope* ❯ *Questions* ❯ *Communication and Information Exchange* ❯ *Integration with External Applications and Solutions* ❯ *Integration with LinkedIn Sales Navigator* ◗ to find the corresponding scoping question.

5.1.38 Configure Buying Center Based on Buying Center Relationships

Administrators can enable buying center for accounts and opportunities and define specific buying center relationships in scoping and fine-tuning activities.

Context

You can enable buying center based on either buying center relationships or business partner relationships. They are exclusive to each other.

Procedure

1. Go to ▶ *Business Configuration* ▶ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Account and Activity Management* ▶ *Account Management* ▶ to find the corresponding question and enable the feature.

2. Go to ▶ *Business Configuration* ▶ *Implementation Projects* ▶. Select your project and navigate to ▶ *Open Activity List* ▶ *Fine-Tune* ▶ *Buying Center Relationship Types* ▶ to define relationship types.

   In addition to standard relationship types such as *Directed By* and *Dotted Line To*, you can create relationship types of you own, for example, *Is A Friend Of* and *Went to School With*.

   You can also specify relationship line colors to increase the visibility of different relationship types in the buying center.

5.1.39 Configure Buying Center Based on Business Partner Relationships

Administrators can enable buying center for contacts and opportunities and define specific buying center relationships in scoping and fine-tuning activities.

Context

You can enable buying center based on either buying center relationships or business partner relationships. They are exclusive to each other.

Procedure

1. Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ❙. Select your project and navigate to ▌▶ *Edit Project Scope* ❯ *Questions* ❯ *Account and Activity Management* ❯ *Account Management* ❙ to find the corresponding question and enable the feature.

2. Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ❙. Select your project and navigate to ▌▶ *Open Activity List* ❯ *Fine-Tune* ❯ *General Business Partners* ❯ *Relationships* ❯ *Maintain Relationships* ❙ to define relationship types.

   In this case, you define buying center relationships, together with other general relationships. However, only those with the *Buying Center Relationship* option checked display in the buying center.

5.1.40 Configure Evernote Integration

Administrators can enable Evernote Integration so any notes taken in a user's Evernote account can be brought over and pinned in opportunities.

Context

Notes from Evernote are managed under the *Evernote* tab that will be available via adaptation once the integration has been set up.

Procedure

1. Log on to your SAP solution and go to ▌▶ *Administrator* ❯ *Mashup Web Services* ❯ *EvernoteService* ❙.
2. Click *Enter API Keys*.
3. Click *Show API Keys*.
4. Enter the OAuth key and secret that you received from Evernote.
5. Save your entries.
6. Back on the *Web Mashup Services* screen, select the row of *EvernoteService* and activate it.

5.1.41 Configure Depersonalization in Opportunities

Administrators can remove personal data from a business object to ensure compliance with the applicable data protection requirements.

Depersonalization is only available for users with access to the *Data Protection and Privacy* work center.

When you depersonalize an opportunity, all personal data such as involved parties and revenue plan partners will be erased. In the meantime, linkages to follow-up objects such as activities and sales quotes, as well as related buying center, are removed. The name of the opportunity is anonymized and replaced with XXXXX. You cannot depersonalize an opportunity if it contains a person that is blocked for removal.

Once an opportunity is depersonalized, you cannot edit or delete that opportunity. However, you can search for opportunities in the *Depersonalized* status. If the *Data Privacy Status* search parameter is not visible, you can add it through *Personalization* or ask your administrators to *Adapt* the layout.

> i Note
>
> A depersonalized opportunity will no longer be available in *My Opportunities* query once the ownership information has been removed.

In case you need to retain certain information, you can download relevant data using OData or Data Workbench prior to depersonalization.

5.1.42 Configure Internal Pricing

Administrators can enable the internal pricing for opportunities.

Go to ▎▶ *Business Configuration* ❯ *Implementation Projects* ▎. Select your project and navigate to ▎▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Opportunities* ❯ *Document Type* ▎.

5.1.43 Configure SAP Intelligent Sales Execution (Datahug) for Opportunities

Administrators can add Datahug to your project scope and enable users to manage pipeline and customer relationship using Datahug.

Prerequisites

> i Note
>
> To use Datahug, a separate license is required from SAP Intelligent Sales Execution.

Procedure

1. Go to ▎▶ *Business Configuration* ❯ *Implementation Projects* ▎. Select your project and navigate to ▎▶ *Edit Project Scope* ❯ *Questions* ❯ *Communication and Information Exchange* ❯ *Integration with External*

Applications and Solutions ❯ *Integration Scenarios with Cloud Solutions from SAP* ❯ to find the corresponding question about enabling Datahug.

2. Go to ❯ *Administrator* ❯ *Sales and Campaign Settings* ❯ *Datahug Settings* ❯ *Open Datahug Administrator* ❯ and provide an API key and secret for accessing Datahug.

3. Assign the *Datahug* work center view (ID: *COD_DATAHUG_WCF*) to appropriate business users or roles for pipeline and forecast management.

   For more details, please check Create Business Roles and Assign Work Centers and Views.

4. Go to the detail view of an opportunity, *Adapt* the master layout and add the *Datahug* tab to opportunities.

   Datahug is also available for accounts and contacts.

5. To add contacts from Datahug to opportunities, you must create a contact role in opportunities configuration. Go to ❯ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ❯ *Open Activity List* ❯ *Fine-Tune* ❯ *Opportunities* ❯ *Maintain Contact Roles* ❯ and add a row with code `ZGHUG`, as well as a description for Datahug.

6. To allow Datahug to automatically add contacts based on touch points identified via e-mail server, contact SAP Intelligent Sales Execution for further configurations.

   For more information, please check out Prepackaged Integration with SAP Intelligent Sales Execution (SAP Datahug).

5.2   Manage Opportunities

In SAP Sales Cloud, you can manage opportunities to identify and follow through on the possibility of selling products or services to a potential customer.

Create Opportunities [page 318]
    Opportunities can be created in multiple ways. For example, you can create an opportunity using the plus button from the opportunity list, or you can convert a qualified lead into an opportunity.

Add Products to Opportunities [page 320]
    You can capture and maintain product line items in opportunities.

Check for Opportuniy Duplicates [page 323]
    Check for duplicate opportunity and lead during opportunity creation.

Internal Pricing for Opportunities [page 324]
    If you are using internal pricing schema from SAP ERP, you can now display these details in the new *Pricing* tab for opportunities.

Add Involved Parties to Opportunities [page 325]
    Business partners can be automatically assigned with party roles and designated as involved parties to opportunities, provided your administrators have activated such party roles and maintained party determination steps in involved parties configuration. As users, you can also manually add involved parties to your opportunities.

Opportunity Statuses [page 329]

The solution provides five standard statuses to help you identify where your opportunities are in the sales pipeline. If required, custom statuses can be set up by your administrators, in lieu of the standard statuses.

Sales Cycles and Phases [page 332]
 A sales cycle starts with recognition of an opportunity and is broken down into major sales phases where specific activities are executed. Having a structured sales process can help you manage opportunity details, measure sales performances, and improve business efficiency.

View Activities in Timeline [page 334]
 You can see activities in a graphical display under the *Timeline* tab to obtain a vivid idea about when the activities need to be performed between the start and close dates of the opportunity.

Work with Activity Advisor [page 335]
 Activity advisor is a sales assistant that helps you establish a structured sales cycle and model your sales methodologies. It proposes a template with activities recommended to be executed during each sales phase of an opportunity to increase the chance of success.

Associate Opportunities with Registered Products [page 336]
 You can create opportunities with references to previously sold products or services. Those references can help evaluate your opportunities in scenarios such as cross, up, and down selling, and offering renewal services.

5.2.1 Create Opportunities

Opportunities can be created in multiple ways. For example, you can create an opportunity using the plus button from the opportunity list, or you can convert a qualified lead into an opportunity.

Following is a list of scenarios where new opportunities are created.

- Derive from qualified and converted leads
- Click the quick create icon
- As follow-up items to other business documents such as campaigns, tickets, and contracts
- Upload via SAP Cloud for Customer APIs
- Copy an existing opportunity

You can also add existing or create new relevant opportunities as reference to the current opportunity under the *Related Opportunities* tab. If you want to establish a hierarchical relationship among opportunities, you can go to the *Hierarchy* tab in an opportunity to add existing or create new child opportunities.

5.2.1.1   Enable Opportunities

Administrators can add opportunities to your project scope.

Go to ▶ *Business Configuration* ⟩ *Implementation Projects* ▌. Select your project and navigate to ▶ *Edit Project Scope* ⟩ *Scoping* ⟩ *Sales* ⟩ *New Business* ⟩ *Opportunities* ▌ and check the box next to the scoping item for using opportunities.

5.2.1.2   Configure Document Types

Administrators can define document types that distinguish one type of opportunity from another. Different types of opportunities can go through different sales cycles.

Go to ❯ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ❯ *Open Activity List* ❯ *Fine-Tune* ❯ *Opportunities* ❯ *Document Types* ❯ *Maintain Document Types* ❯ to edit your opportunity types.

5.2.1.3   Edit Opportunity in Worklist

You can edit multiple products directly in the list, which saves your effort in going to the detail view of each opportunity to make changes.

From Fiori Client navigate to ❯ *Key User* ❯ *Settings* ❯ *Company Setting* ❯ *Enable Editing in Dataset in Fiori Client* ❯.

Once the feature is enabled, you can click the pencil icon in the upper right corner to switch to the edit mode.

Users can filter the worklist that needs to be changed and directly change data in the work list without navigating to the detailed view.

> **i Note**
>
> This feature is not enabled in offline mode.

5.2.1.4   Assign Custom Party Roles to Quick Create or Overview

Add important custom party roles in online mode directly to the quick create or overview screen of an opportunity.

Go to ❯ *Fine Tune* ❯ *Opportunities* ❯ *Involved Parties* ❯ *Assign Party to UI.* ❯

You can assign a maximum of three custom party roles to the UI.

> **→ Tip**
>
> Configure party role to display both ID and value.

> **i Note**
>
> The feature is not supported in offline mode.

5.2.1.5 Create and Assign New Primary Contacts in Opportunities

From an opportunity, you can go to the contact person value help to create and assign a new contact for the opportunity. The *New Contact* action is visible without additional configuration.

5.2.2 Add Products to Opportunities

You can capture and maintain product line items in opportunities.

Products can be included during opportunity creation if your administrators have enabled the feature. For an existing opportunity, you can go to the *Products* tab to *Add* products.

> → Tip
>
> In the latter case, when you search products, you can choose a built-in query called *Related to Documents* to filter out products that are not in the sales area where your opportunity resides.

You can add products one at a time or in bulk from predefined product lists and categories. Under the *Products* tab in an opportunity, click *More* to find the following options.

- *Add From List*: This option includes all products valid for the account and sales area. The products display in parallel.
- *Add From Product Lists*: This option includes all products valid for the account and sales area. The products display in groups based on product lists.
- *Add From All Products*: This option includes all products valid for the sales area. The products display in groups based on product categories.

All the products need to be maintained as master data in the *Products* work center in order to be searchable in opportunities. If you want to include a product that does not exist in the master data, such as a product that has not been introduced to the market, you can add the product by only entering a description. However, such text items will not be copied over to follow-up sales quotes or sales orders.

When you add products to opporutnities, pricing will be fetched provided that list prices are maintained in the system and valid for the accounts and sales areas. Negotiated value will be calculated accordingly, yet you can overwrite it when necessary. Pricing can also be retrieved from ERP via an external pricing call.

Descriptions of the added products are also carried over from product master data and can be overwritten in opportunities. Notes can be jotted down for every product line item that is added to the opportunity.

5.2.2.1 Add Product Mass Entries via Copy-Paste

You can use the copy-paste function to quickly add a large amount of product data under the *Products* tab in opportunities. Data can be copied from Microsoft Excel or delimited text files. Supported delimiters are semicolon and tab.

Prerequisites

This feature is only available in the Fiori client.

You can add products via copy-paste as long as at least one of the following functions is available.

- *Add*
- *Add from List*
- *Add from Product Lists*
- *Add from All Products*

If needed, administrators can hide the icon from the product table via adaptation.

Context

> ⚠ Caution
>
> If the opportunity is *In Approval*, you are not able to use the copy-paste function.

Procedure

1. Go to the *Products* tab in your opportunity.

2. Click the *Paste* icon ( ) and the paste area appears.

3. Copy your product entries excluding the table header in your spreadsheet or source file.

> → Remember
>
> ○ Copied data must match the order of the fields in the user interface.
>
> ○ The total number of input fields must match the number of fields exposed. The checkbox column is not taken into account. For combined fields such as *List Price*, *Unit*, *Quantity*, *Proposed Value*, and *Negotiated Value*, they each represent two columns.
>
> ○ Do not include a delimiter in any field that allows text entry. For example, do not use a semicolon in the *Description* or *Notes* field.

4. Click in the paste area where shows *Paste supported data, such as Excel*.

5. Paste data in the area.

   You can add products using the copy-paste function as many times as needed. Every time you paste a new set of entries into the product list, they are added after the existing data.

5.2.2.2 Mass Delete Associated Products from an Opportunity

You can delete multiple associated products from an opportunity at once by selecting the products and clicking
▌ *More* ❯ *Remove* ❯.

> i Note
>
> As a prerequisite, your administrator must add the *Remove* action via adaptation.
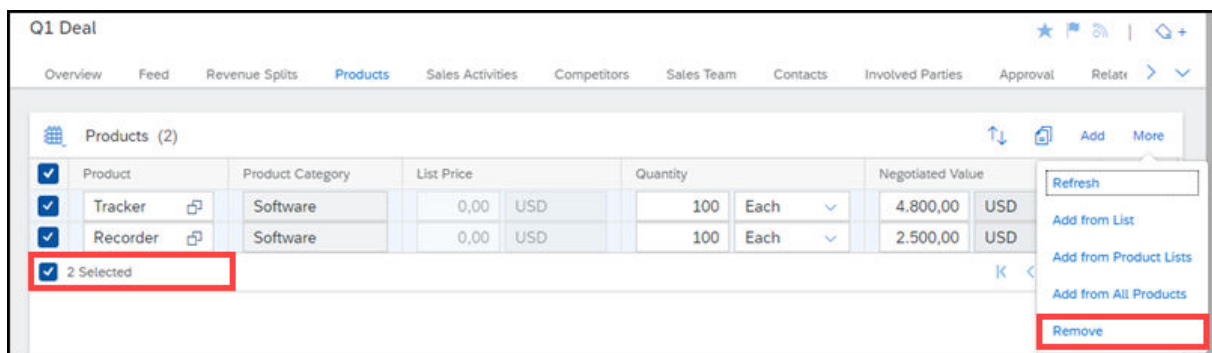
5.2.2.3 Configure Inclusion of Products During Opportunity Creation

Administration can enable users to add relevant products during opportunity creation through configuration.

Go to ▶ *Business Configuration* ▶ *Implementation Projects* . Select your project and navigate to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *New Business* ▶ *Opportunities* to find the corresponding question about adding products during opportunity creation.
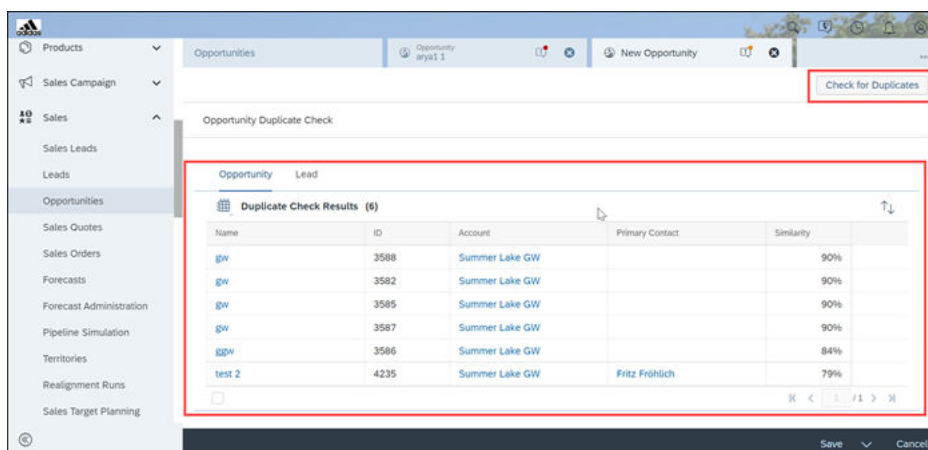
5.2.3 Check for Opportuniy Duplicates

Check for duplicate opportunity and lead during opportunity creation.

During opportunity creation, after you type in all the essential information, click *Check for Duplicates* at the top right. Scroll down to view the similarity check result. You will see tabs that contain duplicate information for opportunities and leads.

Based on the duplicate check result, you can decide whether or not to create an opportunity.

You can also check for duplicates when performing a mass upload of Opportunities using A2X services, provided your administrator has enabled this functionality. An error message tells you which opportunities were not imported due to duplication.

5.2.3.1 Configure Opportunity Duplicate Check

Administrators must scope the feature before use.

1. Go to ▶ *Business Configuration* ▶ *Implementation Projects* and select your project.
2. Go to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *New Business* ▶ *Opportunities* and select scoping question *Do you want to enable duplicate check for opportunity?*
3. To configure it, go to ▶ *Business Configuration* ▶ *Implementation Projects* and select your project.

4. Go to ▌▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Opportunity Duplicate Check* ▌.

You can assign *Weighting* to available opportunity fields. The higher the weightage for the field, the more importance is placed on the field when the solution finds duplicates.

5.2.4 Internal Pricing for Opportunities

If you are using internal pricing schema from SAP ERP, you can now display these details in the new *Pricing* tab for opportunities.

Use these details to edit online prices and discounts for products assigned to opportunities.

These price agreements get copied to follow-up *Sales Quotes* and *Sales Orders*.

> **i Note**
>
> If you use external pricing for the follow-up quote and order, you must map the internal price conditions with the external price conditions using a custom solution.

This provides you the flexibility to maintain the agreed prices or discounts already in *Opportunity*.

5.2.4.1   Configure Internal Pricing

Administrators can enable the internal pricing for opportunities.

Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Opportunities* ❯ *Document Type* ▌.

5.2.5 Add Involved Parties to Opportunities

Business partners can be automatically assigned with party roles and designated as involved parties to opportunities, provided your administrators have activated such party roles and maintained party determination steps in involved parties configuration. As users, you can also manually add involved parties to your opportunities.

Once configured, opportunity party determination can be automatically triggered under the following circumstances:

- Upon opportunity creation
- Anytime you make a change to an opportunity party
- Anytime you make a change to an opportunity field that is part of determination rules, if applicable

In opportunities, you can manually maintain involved parties under corresponding tabs. If you have multiple sales representatives working on one opportunity, you can include those employees under the *Sales Team* tab. Contacts can be identified under the *Contacts* tab. Competitors can be tracked under the *Competitors* tab. Other partners such as bill-to and ship-to parties can be added to the *Involved Parties* tab.

If your administrators have enabled the *All Involved Parties* tab, you can view and add all the opportunity parties including sales teams, competitors, and sales partners on one single screen. In addition, you can add related contacts and maintain one-time addresses as well as communication lines that are only valid for this opportunity. If the party role *Account* is not defined as mandatory, it is possible to maintain an address without selecting an account.

> ### i Note
>
> By default, map view of the opportunity list considers the address of the associated account. If you maintain a one-time address by overriding the account's address, the opportunity is displayed at the one-time address on map.

Parties that are manually added by users or entered using custom coding are protected from being removed or changed by party determination.

You can analyze party determination details by clicking ▌▶ *Actions* ❭ *Check Party Determination* ❭. This feature is available on both quick create and overview screens. Administrators must enable the action via adaptation.

5.2.5.1 Configure Involved Parties

Administrators can maintain involved parties for opportunities by activating applicable party roles and determination steps.

Go to ▌▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▌▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Opportunities* ❭ *Involved Parties* ❭ *Maintain Involved Parties* ❭ to edit your involved parties.

Based on your business needs, you can *Exclude* activated party roles from realignment run or inbound integration scenarios, for example, when you replicate opportunities from ERP to SAP Cloud for Customer.

For customized party roles, there is an additional determination step called *Use Rules for <Party Role Name>*. This option allows you to default parties based on specific conditions that can be defined in ▌▶ *Administrator* ▶ *Sales and Campaign Settings* ▶ *Define Rules for Opportunity Parties* ▌.

Related Information

5.2.5.2   Configure Party Determination Rules for Opportunities

Administrators can create rules for automatic party determination in opportunities.

Prerequisites

> **i Note**
>
> Rule-based determination is only available for customized party roles.

Administrators must activate desired party roles and a determination step called *Use Rules for <Party Role Name>* in involved parties configuration. Otherwise, those party roles will not be available for selection in the rule table, and previous relevant rules will no longer take place.

Context

If activated, the determination rules can be triggered upon opportunity creation and anytime users make a change to an opportunity field that is part of the rule conditions. Once the determination rules are triggered, affected business partners will be automatically assigned with specified party roles and designated as involved parties to opportunities that fulfill the predefined criteria.

Procedure

1. Go to ▌▶ *Administrator* ▶ *Sales and Campaign Settings* ▶ *Define Rules for Opportunity Parties* ▌ to launch the rules table.
2. If it is your first time to create rules, use *Adapt Columns* to set up the rules table. You can have up to 20 columns in the table, including last two result columns, *Party ID* and *Party Role*.

> **→ Tip**
>
> We recommend that you remove any unwanted columns and only keep required ones as extra columns can impact system performance.

3. Choose *Insert Row* above the rules table. A new row with an asterisk in each field will be added to the table.

   You can add values to more than one field in a row. The fields in one row evaluate as a logical **AND** relationship, which means the field values must all evaluate to true in order for the rule to evaluate to true.

4. Click the asterisk symbol in a cell to enter a value for that field. The rules table offers a variety of logical operators to define your values.

> **→ Tip**
>
> We recommend that you take full advantage of operators to consolidate your rules for better system performance.
>
> For example, if your rules determine assignments based on zip codes, you can use the *Between* operator to set up a range of zip codes in sequence, or you can use the *Include* operator to group zip codes that have the same prefix.

5. Continue to add rows for each desired result.

   The rows in the rules table evaluate as a logical **OR** relationship. The system will compare each rule from top to bottom until it finds one match, which suggests that the most specific rule should be placed at the top of the table and generic ones should be near the bottom.

   You can rearrange rows by selecting the row and clicking *Swap*.

6. Click *Save* when you finish.

7. Click *Activate Rules*.

   For your updated rules, unless you reactivate them, otherwise the previous rule sets will continue to execute.

Related Information

Configure Involved Parties [page 349]

5.2.5.3   Configure Automatic Party Re-Determination

Administrators can set up the solution to automatically re-determine opportunity parties when a change is made to the associated account team or territory team.

Go to ▌▶ *Business Configuration* ❭ *Implementation Projects* ▐. Select your project and navigate to ▌▶ *Edit Project Scope* ❭ *Questions* ❭ *Sales* ❭ *New Business* ❭ *Opportunities* ▐ to find the corresponding question about opportunity party re-determination.

When party re-determination is triggered, a background job that runs every eight minutes will go through *Open* or *In Process* opportunities and realign all the parties in those opportunities.

> **i Note**
>
> If you don't want certain party roles to be re-determined, you can *Exclude* those party roles from realignment in involved parties configuration.
>
> Opportunities that are *In Approval* are also excluded from party re-determination.

Related Information

Configure Involved Parties [page 349]

5.2.5.4 Actions for Redetermination of Involved Parties

You can correct the determination of the involved parties in opportunities using redetermination options.

The redetermination actions are:

- *Redetermine Completely*: This action redetermines parties based on the current master data and determination configuration. This is also applicable for sales data and territory. Data entered manually is not protected from being removed or changed by party redetermination.
- *Redetermine Keeping Manual Changes*: This action redetermines parties based on the current master data and determination configuration. This is also applicable for sales data and territory. Data entered manually is protected from being removed or changed by party redetermination.

Administrators must enable the actions via *More* button group using the *Adaptation* mode.

5.2.6 Opportunity Statuses

The solution provides five standard statuses to help you identify where your opportunities are in the sales pipeline. If required, custom statuses can be set up by your administrators, in lieu of the standard statuses.

- *Open*: The initial status is set to open upon opportunity creation.
- *In Process*: The status can be set when you start working on the opportunity.
- *Won* or *Lost*: The statuses are available as long as the opportunity is not stopped.
- *Stopped*: The status is only available when the opportunity is in process.

You may need to specify a reason to indicate why a status has been set, depending on how your administrators have configured it.

5.2.6.1 Mass Update Opportunity Statuses From the List

You can update multiple opportunity statuses at once directly from the opportunity list, which saves your efforts in going to the detail view of each opportunity to make changes.

Procedure

1. From the opportunity list, select one or multiple rows for which you want to change the status.

   > i Note
   >
   > The opportunities selected for a mass update must have the same document type and status.

2. From the *Actions* menu at the bottom right, make a selection and set the status to the next possible life stage.
   - If you are using standard statuses provided with the solution, you can choose from *Set as Open*, *Set as In Process*, *Set as Won*, *Set as Lost*, and *Set as Stopped*, depending on their availability.
   - If you are using custom statuses defined by your administrators, you see an action called *Set Custom Status*.

3. Select a reason as to why the status is changed.

   > i Note
   >
   > The feature of setting a reason code for status updated from the list is supported by default for opportunities using custom status. For opportunities utilizing standard status, your administrators must turn on a scoping question to enable this feature.

5.2.6.2 Configure Custom Status

Administrators can customize opportunity statuses that help identify where the prospects are in the sales pipeline.

Context

You must define a complete set of custom statuses with equivalence of all the five lifecycle statuses.

Procedure

1. Go to ▶ *Business Configuration* ❯ *Implementation Projects* ▶. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Opportunities* ❯ *Custom Status* ❯ *Maintain Custom Status* ▶.

2. Choose a *Document Type*.

3. Click *Add Row* to create a new status.

4. Enter a number as *Sort Sequence*. It determines where the new status appears in the drop-down list of your opportunity status and has no influence on how opportunities are processed.

5. Specify the *Status Code*. Customized status codes must begin with the identifier *Z*.

6. Decide whether your new status should be the initial status for newly created opportunities.

   > **i** Note
   >
   > Only one status can be set as *Initial Status*.

7. Check *Active* to make the status visible for your users.

8. Give a name to your new status in the *Description* field.

9. Select an *Life Cycle Status* in which your new status will be active. A customized status should always be connected to a pre-delivered status and follow the internal logic that particular status represents.

10. Decide whether the opportunity with this new status can be submitted for approval.

    > **i** Note
    >
    > You can remove a customized status only when it is not in use in the application.

5.2.6.3 Configure Total Negotiated Value for Standard and Custom Status

To control *Total Negotiated Value* for standard status, follow these steps:

1. Navigate to ▶ *Business Configuration* ❯ *Implementation Projects* ▶ and select your project.

2. Click ▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Opportunities* ❭ *Maintain Reasons* ❭ and check the column *Reduce Total Negotiated Value*.

To control *Total Negotiated Value* for custom status, follow these steps:

1. Navigate to ▶ *Business Configuration* ❭ *Implementation Projects* ❭ and select your project.
2. Click ▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Opportunities* ❭ *Maintain Custom Status* ❭ and check the column *Reduce Total Negotiated Value*.

5.2.6.4   Configure Reasons

Administrators can maintain reasons that specify why a status has been set.

Go to ▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Opportunities* ❭ *Reasons* ❭ *Maintain Reasons* ❭ to edit your reasons.

5.2.6.5   Configure Assignment of Reasons

Administrators can activate reasons for applicable opportunity statuses via assignment.

Go to ▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Opportunities* ❭ *Assignment of Reasons* ❭ *Assign Reasons* ❭ to assign your reasons.

5.2.6.6   Configure Reason Selection for Status Updated from the Opportunity List

Administrators can enable users to select a reason for a standard status change they make directly from the opportunity list.

> **i Note**
>
> Feature enablement is only required for opportunities using standard statuses. Standard status actions include *Set as Open*, *Set as In Process*, *Set as Won*, *Set as Lost*, and *Set as Stopped*. For opportunities using custom status, this feature is supported by default.

Go to ▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▶ *Edit Project Scope* ❭ *Questions* ❭ *Sales* ❭ *New Business* ❭ *Opportunities* ❭ and check the scoping question about enabling reason selection.

5.2.6.7   Define Workflow Rule to Update Opportunity Custom Statuses

Administrators can define workflow rules that update opportunity custom statuses and reasons based on sales quote conditions.

This feature allows you for example, to set an opportunity to *Won*, if the related primary sales quote turns to *Won*.

> ! Restriction
>
> Custom values with the same descriptions cannot be distinguished in the workflow rule definition.

5.2.7 Sales Cycles and Phases

A sales cycle starts with recognition of an opportunity and is broken down into major sales phases where specific activities are executed. Having a structured sales process can help you manage opportunity details, measure sales performances, and improve business efficiency.

Sales cycles can vary, depending on what you are selling and who you are selling to. Your administrators have full flexibility to define unique sales cycles and phases for different opportunity types.

Further, administrators can enable and configure a sales assistant called *Activity Advisor* to propose a checklist of activity recommendations tailored for each sales phase and guide sales representatives through the entire sales cycle.

In the solution, when you make a change to the *Sales Phase* field, following fields will also be automatically affected, which may draw your attention.

- As you move an opportunity from one phase to the next, the likelihood of winning the deal increases. In response, you will see the percentage value in the *Probability* field rises automatically, the increment of which depends on how your administrators have specified the chance of success for each sales phase during configuration. As users, you can overwrite the value and manually maintain the field, if necessary.
- The *Days in Sales Phase* field shows you for how many days an opportunity has been in the current phase. When you change the sales phase, the value will be reset to zero.
- When an opportunity remains in one sales phase for a certain period of time, the *Progress* field can change from *On Track* to *Slow* and *Stalled* on the premise that your administrators have enabled and configured sales phase progress.

Related Information

Work with Activity Advisor [page 335]

5.2.7.1 Configure Sales Cycles and Phases

Administrators can customize sales cycles and phases for each opportunity type through configuration.

Context

Different types of opportunities can go through different sales cycles and phases.

Procedure

1. Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◀. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Sales Cycles and Phases* ◀.
2. Define *Sales Phases* according to your business needs.
3. Define *Analysis Phases* for company-wide reporting.
4. Click *Maintain Sales Cycles* to define cycles for different opportunity types, assign sales phases to each sales cycle, and assign corresponding analysis phase to each sales phase.

   If an opportunity remains in one phase for certain days without any updates, it can be considered as slow and stalled in progress. You can specify the number of the days in sales cycle configuration.

   The probability of closing a deal can increase when an opportunity reaches certain sales phases. You can also specify the chance of success for each phase in sales cycle configuration.
5. Click *Specify Default Sales Cycle* to select one sales cycle as default for your opportunities.

Related Information

Configure Sales Phase Progress [page 333]

5.2.7.2 Configure Sales Phase Progress

Administrators can enable the *Progress* field in an opportunity and remind employees to take actions when the sales progress is *Slow* or *Stalled* instead of *On Track*.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◀. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *New Business* ❯ *Opportunities* ◀ to find the corresponding question about enabling phase progress.

When an opportunity remains in the same sales phase for a certain number of days, its progress can be considered as slow or stalled instead of on track. During sales cycles and phases configuration, administrators

can specify the maximum days for an opportunity to be considered as *On Track* before the system moves the progress to *Slow* and then *Stalled*.

Related Information

5.2.8 View Activities in Timeline

You can see activities in a graphical display under the *Timeline* tab to obtain a vivid idea about when the activities need to be performed between the start and close dates of the opportunity.

You can filter down activities based on type and status to view only the relevant ones. Activities defined as internal by your administrators are shown below the timeline, whereas external activities are spead above the line.

Activity timeline helps you get a picture of activities that are already in scope. Next, you may want to go to the *Sales Activities* tab and consult *Activity Advisor* if the feature has been enabled by your administrators. It offers a checklist of recommended activities that should to be carried out in each phase of an opportunity. You can review the list and add relevant activities that have not been included to your opportunity.

Related Information

5.2.8.1   Configure Activity Timeline

Administrators can include activities in a timeline view so users can have an intuitive idea about when the items need to be performed.

Go to ▌ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▌ *Open Activity List* ❯ *Fine-Tune* ❯ *Opportunities* ❯ *Activity Timeline* ❯ *Maintain Timeline* ▐ to activate activities.

Activities checked as *Internal* are shown below the timeline, whereas external activities are displayed above the line.

5.2.9 Work with Activity Advisor

Activity advisor is a sales assistant that helps you establish a structured sales cycle and model your sales methodologies. It proposes a template with activities recommended to be executed during each sales phase of an opportunity to increase the chance of success.

> ℹ Note
>
> As prerequisites, your administrators must enable the feature and define activity suggestions in advance for each sales phase.

You may have manually added several activities when you created the opportunity. You can review activities that are already in scope in panes under the *Sales Activities* tab or in a graphical display under the *Timeline* tab. Then you can further consult *Activity Advisor* under the *Sales Activities* tab to check and add relevant activities that have not been included to your opportunity.

> → Tip
>
> A plus icon is available next to each activity proposal, allowing you to quickly add the activity with just one click. As a prerequisite, administrators must remove the *Added* column from the table and add the *Action* column that displays the plus icon via adaptation.

We recommend that you include all the mandatory activities and carry them out in each sales phase. Missing or incomplete mandatory activities do not hinder you from moving your opportunity to the next sales phase. However, when mandatory activities are not added to the opportunity, system messages can be displayed. If the system messages are displayed as errors, the opportunity is considered inconsistent. An inconsistent opportunity cannot be converted into a sales quote or sales order.

Related Information

5.2.9.1 Configure Activity Advisor

Administrators can enable a sales assistant with a list of proposed activities to guide sales representatives through each sales phase of an opportunity.

Context

Administrators can enable and configure activity advisor in scoping and fine-tuning activities.

Procedure

1. Go to ▮▶ *Business Configuration* ▶ *Implementation Projects* ◤. Select your project and navigate to ▮▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *New Business* ▶ *Opportunities* ◤ to find the corresponding question and enable the sales assistant.

2. Go to ▮▶ *Business Configuration* ▶ *Implementation Projects* ◤. Select your project and navigate to ▮▶ *Open Activity List* ▶ *Fine-Tune* ▶ *Sales Assistant* ▶ *Maintain Activities* ◤ to define suggested activities.

3. Go to ▮▶ *Business Configuration* ▶ *Implementation Projects* ◤. Select your project and navigate to ▮▶ *Open Activity List* ▶ *Fine-Tune* ▶ *Sales Assistant* ▶ *Assign Activities to Sales Phases* ◤ to assign predefined activities to specific sales phases.

5.2.10 Associate Opportunities with Registered Products

You can create opportunities with references to previously sold products or services. Those references can help evaluate your opportunities in scenarios such as cross, up, and down selling, and offering renewal services.

Once your administrators have enabled the feature, you can add registered products to your opportunities, create opportunities from registered products, and report on opportunities with references to registered products.

5.2.10.1 Add Registered Products to Opportunities

You can link one or multiple registered products to your opportunities.

- During opportunity creation, you can select *Serial ID*, *Associated Product (Reg. Product)*, *Installation Point*, and *Installed Base* to include a registered product, and it automatically becomes the primary registered product for that opportunity.
- In the detail view of an opportunity, you can go to the *Registered Products* tab to add more registered products.
- Registered products can also be connected to an opportunity using web services such as A2X and OData, or via data upload using Data Workbench.

If the fields are not visible, you can use *Personalization* or ask your administrators to *Adapt* the layout.

5.2.10.2 Create Opportunities from Registered Products

You can create an opportunity from one or multiple registered products to increase your wallet share from an existing product.

- In the *Registered Products* work center, you can select one or multiple relevant registered products from the list, and create a *New Opportunity* from the *More* option at the bottom right. When the opportunity quick create screen opens, the registered products pane will be automatically populated with values of the

highlighted registered products. If all the registered products selected belong to the same account, the account will be defaulted for the opportunity.

- You can also go to the detail view of a registered products by clicking its *ID* or *Serial ID*, and create a new opportunity under the *Opportunities* tab. When the opportunity quick create screen opens, the related fields will be automatically populated with values of that registered product.

5.2.10.3 Report on Opportunities with References to Registered Products

You can use the data sources below to create your reports regarding registered products, as well as installation points and installed bases.

Data Source	Description
CODOPPREGPRDU	Contains all the registered products of opportunities. It allows you to analyze related registered products of opportunities.
CODOPPREGPRDGENU	Contains all the installed objects of opportunities. It allows you to analyze installed objects of opportunities.

5.2.10.4 Configure Association of Registered Products in Opportunities

Administrators can enable users to create opportunities with references to previously sold products through configuration.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* ▌. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Sales* 〉 *New Business* 〉 *Opportunities* ▌ to find the corresponding question about capturing registered products in opportunities.

5.3 Collaborate on Opportunities

Opportunities often involve a team of sales representatives, contacts, partners, and key stakeholders. The solution provides you with various ways to keep track of and collaborate with these distinct team members.

For example, you can utilize the *Feed* tab to share updates and communicate ideas with colleagues about a specific opportunity. This native collaboration platform can be enhanced with SAP Jam feeds and groups that allow you to upload content, create polls, conduct surveys, and much more, if your solution is provisioned with SAP Jam.

Under the *Notes* tab, you can create, edit, and delete your own notes, and view your team members' notes captured in note history. For mobile users, the solution also offers voice-to-text support in notes. In addition, you can also bring over your notes from Evernote if your administrators have configured the integration.

Your administrators can also maintain access restrictions so that only the members of your sales team can access opportunities assigned to your sales area.

Work with SAP Jam [page 339]

The integration with SAP Jam soution enables you to bring both internal sales employees and external contacts on a single collaboration platform to facilitate communication and increase customer engagement.

Work with Influencer Map [page 340]
The influencer map shows you a spiral of top influencial contacts and employees around a contact, and allows you to redefine their perceived importance in driving sales.
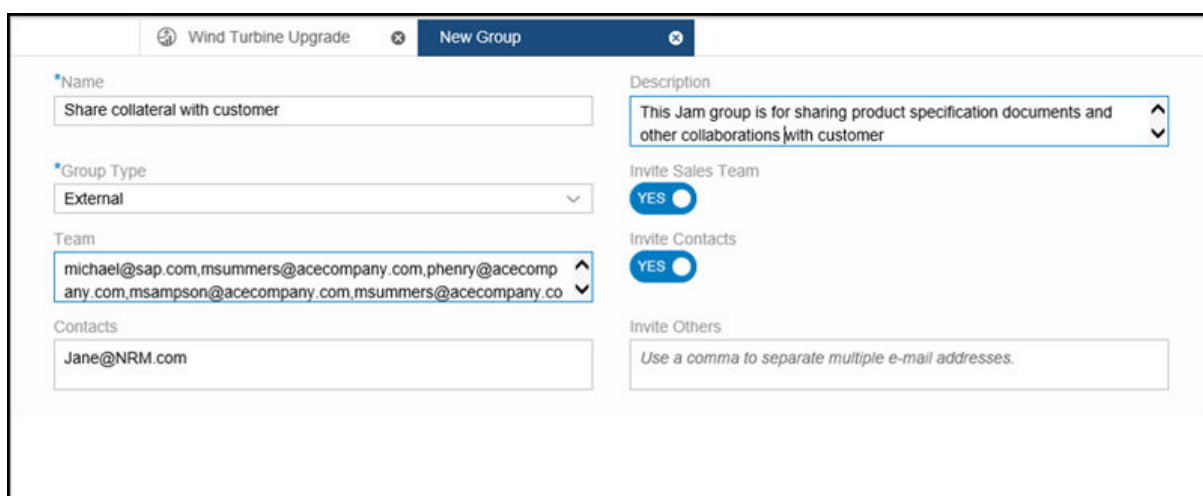
Work with LinkedIn Sales Navigator [page 340]
With LinkedIn Sales Navigator enabled by your administrators, you can look up publicly available LinkedIn profile information about accounts or contacts, and nurture your prospects through networking.

5.3.1 Work with SAP Jam

The integration with SAP Jam soution enables you to bring both internal sales employees and external contacts on a single collaboration platform to facilitate communication and increase customer engagement.

Once your administrators have configured SAP Jam integration, you can go to the *Groups* tab and create SAP Jam groups using the deal room template to strategize with sales members about winning an opportunity. You can also invite your customer contacts to join the groups and share superior content such as presentations and product specification documents.

Related Information

Prepackaged Integration with SAP Jam

5.3.2 Work with Influencer Map

The influencer map shows you a spiral of top influencial contacts and employees around a contact, and allows you to redefine their perceived importance in driving sales.

Based on an employee's or contact's participation in previous opportunities, the likelihood of an employee or contact knowing the central contact increases. When you click on a profile, you will see the numbers of total deals, as well as won and ongoing deals which the influencer has been involved in. You can also see how much an employee has contributed to the total revenue. A score is calculated using those numbers based on certain weightage, and determines the influencer's position in the spiral.

You can manually change the position of the influencer if you believe that an employee or a contact has been displayed too close or too far from the central contact according to your real life experience.

Employees and contacts that have been assigned to the opportunity have a check mark on their profile pictures. You can also add top influencers that are not part of the opportunity into the sales team or your contact list by dragging them into the *Add to Opportunity* frame.

5.3.2.1   Configure Influencer Map

Administrators can enable an influencer map so users can see top influencial contacts and employees around a contact.

Go to ▎▶ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▎▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *New Business* ❯ *Opportunities* ▐ to find the corresponding scoping question about enabling the influencer map.

Once you have checked the scoping question, you can *Adapt* the master layout and add *Top Influencers* as a new field to *Contacts* and *Sales Team*, as well as the corresponding panes under the *Overview* tab.

If you want to customize any labels for the influencer map, you can go to ▎▶ *Administrator* ❯ *Sales and Campaign Settings* ❯ *Influencer Map* ▐ and adapt the master layout there.

5.3.3 Work with LinkedIn Sales Navigator

With LinkedIn Sales Navigator enabled by your administrators, you can look up publicly available LinkedIn profile information about accounts or contacts, and nurture your prospects through networking.

LinkedIn Sales Navigator iframes are embedded in the *Overview* and *Contacts* tabs in your leads, opportunities, buying center, accounts, and contacts. In the overview tab, Sales Navigator gives you information about the company. When a contact is selected, Sales Navigator shows you a profile about the person. You may see your contacts' recent activities and find a topic of interest to help you start a conversation with your prospects. Or, you may find someone you know to introduce you directly to your potential customers.

LinkedIn Sales Navigator uses basic information such as first name, last name, e-mail address, job title, and company name to find the correct company or person on LinkedIn. In case the result is not the one that you are looking for, you can further perform a search to find a match. For your contacts, the *Save as Lead* option in the

iframe allows you to save the person as a lead in LinkedIn Sales Navigator. Such leads are not recorded in SAP Cloud for Customer.

To use this feature, you must allow browser cookies from LinkedIn.

- In Google Chrome, go to ▶ *Settings* ❯ *Advanced* ❯ *Privacy and security* ❯ *Content settings* ❯ *Cookies* ❯ *Allow* ❳ and add `[*.]linkedin.com`.
- In Internet Explorer, go to ▶ *Internet Options* ❯ *Security* ❯ *Trusted sites* ❯ *Sites* ❳ and add `http:// linkedin.com`.

> **i Note**
>
> You need a LinkedIn Sales Navigator Team or Enterprise account to use this feature. However, if you have previously signed in to LinkedIn with a different account on your computer, you may be automatically signed in with that account. To relogin with the standard account, you must first clear your previous browsing cookies.

5.3.3.1 Configure LinkedIn Sales Navigator

Administrators can enable LinkedIn Sales Navigator to allow users to look up publicly available LinkedIn profile information of an account or a contact.

> **i Note**
>
> A LinkedIn Sales Navigator Team or Enterprise license is required to use this feature. You can sign up for a free trial here ↗ .

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❳. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Communication and Information Exchange* ❯ *Integration with External Applications and Solutions* ❯ *Integration with LinkedIn Sales Navigator* ❳ to find the corresponding scoping question.

5.4 Work with Buying Center

Buying center is a relationship management tool that tracks and visualizes contact-to-contact and contact-to-employee relationships related to a given account, contact, or opportunity. If properly maintained, buying center can help you identify decision makers and key influencers in your opportunities so you can optimize your sales pitches for prospects accordingly.

Buying center can be enabled by your administrators in two ways. They are exclusive to each other.

- Buying center relationships
  If enabled based on buying center relationships, buying center will be available in the *Accounts* and *Opportunities* work centers.
  You can maintain buying center relationships under the *Buying Center* tab individually per account or opportunity.

In the detail view of a contact, a tab called *Buying Center Involvement* also becomes available. Here you can see a read-only list of open or in process opportunities where the contact is involved. The definition of being involved is that the contact is a part of at least one relationship in that opportunity buying center.

- Business partner relationships
  If enabled based on business partner relationships, buying center will be available in the *Contacts* and *Opportunities* work centers.
  In a contact, you maintain buying center relationships, together with other general relationships, under the *Relationships* tab. However, only those checked as *Buying Center relevant* are reflected in a hierarchical view under the *Buying Center Relationships* tab. The *Buying Center Involvement* tab is also available for you to see a read-only list of open or in process opportunities where the contact is involved. The definition of being involved is that the contact is a part of at least one relationship in that opportunity buying center.
  In an opportunity, you maintain opportunity-specific relationships under the *Buying Center* tab.
  In the detail view of an account, a tab called *Buying Center* also becomes available. Here you can see a read-only graphic of the buying center relationships for all contacts linked to that account. If you make any relationship changes in a contact and the changes are buying center relevant, you can update the relationship hierarchy in the associated account by refreshing the buying center.

> → Tip
>
> If the tabs mentioned above are not visible, you can use *Personalization* or ask your administrators to *Adapt* the master layout.

The migration of buying center data into the solution is also supported.

In an opportunity, you can create buying center relationships from scratch, or import relationships from the corresponding account or contact and build upon them.

Once buying center relationships are created or imported from the associated account or contact, you can further manage relationships under the *Buying Center* tab in your opportunity.

5.4.1 Import Buying Center Relationships from Accounts or Contacts

In an opportunity, you can create buying center relationships from scratch, or import relationships from the corresponding account or contact and build upon them.

If the feature is based on buying center relationships, the *Import from Account* option becomes available under the *Buying Center* tab in your opportunity. It allows you to bring in relationships that have been maintained in the corresponding account. If the feature is based on business partner relationships, you will see the *Import from Contact Relationships* option instead. The two options are exclusive to each other.

> i Note
>
> After the relationships are copied over, the import option will no longer be available. In addition, any changes done in the buying center of an opportunity will not be reflected in the buying center of the associated account or contact, and vice versa.

A contact-to-contact or contact-to-employee relationship will be imported from the matching account or contact only when both parties are assigned to the opportunity.

5.4.1.1 Configure Buying Center Based on Buying Center Relationships

Administrators can enable buying center for accounts and opportunities and define specific buying center relationships in scoping and fine-tuning activities.

Context

You can enable buying center based on either buying center relationships or business partner relationships. They are exclusive to each other.

Procedure

1. Go to ▶ *Business Configuration* ▶ *Implementation Projects* ❯. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Account and Activity Management* ❯ *Account Management* ❯ to find the corresponding question and enable the feature.

2. Go to ▶ *Business Configuration* ▶ *Implementation Projects* ❯. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Buying Center Relationship Types* ❯ to define relationship types.

   In addition to standard relationship types such as *Directed By* and *Dotted Line To*, you can create relationship types of you own, for example, *Is A Friend Of* and *Went to School With*.

   You can also specify relationship line colors to increase the visibility of different relationship types in the buying center.

5.4.1.2 Configure Buying Center Based on Business Partner Relationships

Administrators can enable buying center for contacts and opportunities and define specific buying center relationships in scoping and fine-tuning activities.

Context

You can enable buying center based on either buying center relationships or business partner relationships. They are exclusive to each other.

Procedure

1. Go to ▮▷ *Business Configuration* ❯ *Implementation Projects* ▮. Select your project and navigate to ▮▷ *Edit Project Scope* ❯ *Questions* ❯ *Account and Activity Management* ❯ *Account Management* ▮ to find the corresponding question and enable the feature.

2. Go to ▮▷ *Business Configuration* ❯ *Implementation Projects* ▮. Select your project and navigate to ▮▷ *Open Activity List* ❯ *Fine-Tune* ❯ *General Business Partners* ❯ *Relationships* ❯ *Maintain Relationships* ▮ to define relationship types.

   In this case, you define buying center relationships, together with other general relationships. However, only those with the *Buying Center Relationship* option checked display in the buying center.

5.4.2 Maintain Buying Center Relationships in Opportunities

Once buying center relationships are created or imported from the associated account or contact, you can further manage relationships under the *Buying Center* tab in your opportunity.

> **i Note**
>
> Any changes done in the buying center of an opportunity will not be reflected in the buying center of the associated account or contact, and vise versa.

Under the *Buying Center* tab, you can select the *Table View* or the *Chunk View* to add, edit, and delete contact-to-contact and contact-to-employee relationships, and define relationship attributes as desired to further qualify the nature of the relationship. Your administrators can define available relationship types to choose from through configuration.

Choose the *Hierarchy View* to see contact-to-contact relationships in a graphical display. The following intructions can walk you through the buying center features in opportunities.
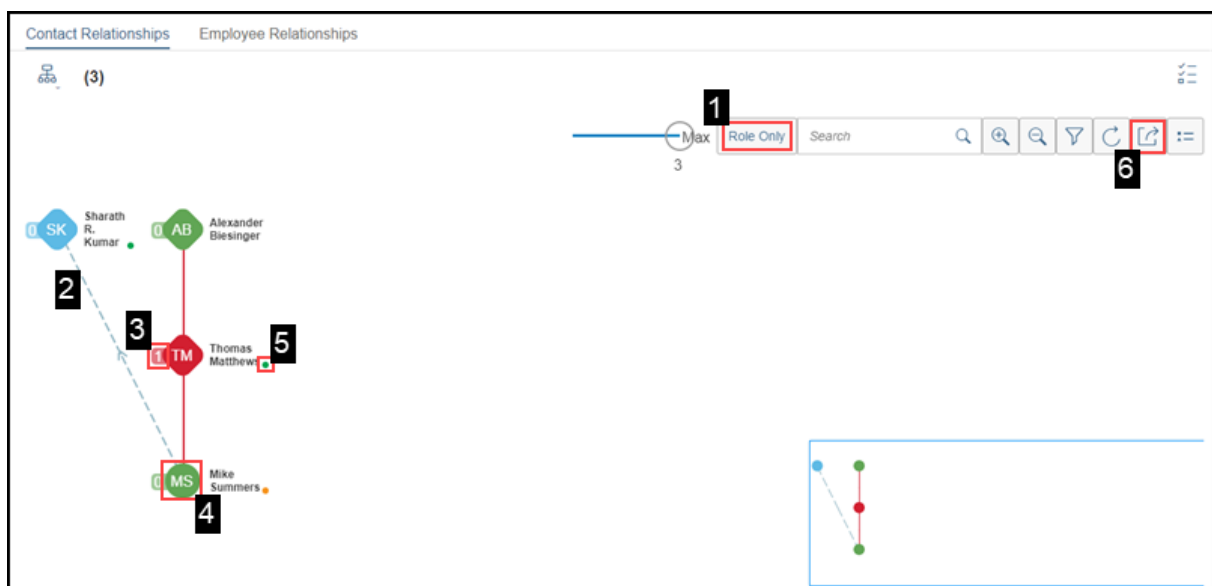
1. Use the *Role Only* button to toggle between the role view and the hierarchy view. Roles can be defined under the *Contacts* tab. Different roles can have different profile picture colors, depending on how your administrators have configured contact roles.

2. Different relationship types may have different relationship line colors, depending on how your administrators have configured buying center relationships or business partner relationships.

3. The number next to the profile picture indicates how many employees have been assigned to the contact in this buying center. When you click on the number, you will see employees who are assigned to the contact in this buying center under *Buying Center*. If there are employees assigned to the contact outside of this buying center, they will show under *Outside*.

4. For contacts who are directly linked to the account, their profile pictures display in the shape of a circle. For those who are not directly linked to the account, their profile pictures display in the shape of a diamond.

5. If you have captured a contact's attitude toward the opportunity or company, you will see a colored dot in the right corner next to the contact's profile picture. Green means positive, orange means neutral, and red means unfavorable.
   Attitude Toward Opportunity can be defined under the *Contacts* tab in the account or opportunity. *Perception of Company* is copied from the *Overview* tab in the contact. The attitude indicator dot only considers *Perception of Company* when *Attitude Toward Opportunity* is undefined.

6. On the right side, you can see contacts assigned to the account or opportunity but without buying center relationships.

7. You can export buying center relationships into a .png image file.

5.4.2.1 Configure Contact Roles

Administrators can define roles that classify different contacts, and assign roles with respective colors that display in the buying center.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* ▶. Select your project and navigate to ▶ *Open Activity List* 〉 *Fine-Tune* 〉 *Opportunities* 〉 *Contact Roles* 〉 *Maintain Contact Roles* ▶ to edit your contact roles.

5.5 Evaluate Opportunities

Opportunity evaluation is a process where you deepen your understanding of your customers' needs and painpoints, as well as buying concerns, based on which you can identify and focus on opportunities that have a higher chance of success.

Add Surveys and Activities to Opportunities [page 346]
  You may have mandatory or voluntary activity plans such as surveys, tasks, appointments, and phone calls predefined and assigned by your administrators to help you develop your opportunities.

Opportunity Intelligence [page 348]
  Opportunity scoring leverages machine learning that is trained on your historical sales data to find patterns and predict the probability of closing a deal. With machine learning powered by SAP Leonardo, the score pane also shows you key factors that impact the resulting scores.

Assess Competitors [page 348]

Keeping track of your competitors as well as competitor products in opportunities helps you assess your competitors and better evaluate your opportunities.

5.5.1 Add Surveys and Activities to Opportunities

You may have mandatory or voluntary activity plans such as surveys, tasks, appointments, and phone calls predefined and assigned by your administrators to help you develop your opportunities.

In the *Activity Planner* work center, your administrators can enable automatic assignment for activity plans during creation and define routing rules.

For activity plans that can be automatically assigned, you can manually trigger routing by refreshing to obtain most current activity plans. Also, your administrators can use workflow rules to define when the routing rules can be executed automatically.

For activity plans that cannot be automatically assigned, you can manually add applicable activity plans using following actions.

- *Add Activities from Activity Plan* at the opportunity header level to include a list of tasks, appointments, and phone calls
- *Add Appointments from Activity Plan* in the appointment list under the *Sales Activities* tab
- *Add Phone Calls from Activity Plan* in the phone call list under the *Sales Activities* tab
- *Add Tasks from Activity Plan* in the task list under the *Sales Activities* tab
- Add surveys under the *Surveys* tab

Related Information

Activity Planning and Routing [page 704]
Workflows [page 148]

5.5.1.1   Update Surveys and Activities by Refreshing

You can obtain most current surveys and activities assigned to your opportunity by refreshing.

Prerequisites

Your administrators have defined activity plans and routing rules in the *Activity Planner* work center.

> **i Note**
>
> For each survey or activity to be routed, the *Assign Automatically* option must be checked during the creation of the activity plan.

Context

Your administrators can define when applicable activity plans can be automatically assigned to opportunities using workflow rules. As users, you also can follow the steps below to manually trigger the routing.

Procedure

1. Go to the detail view of an opportunity.
2. From the *Actions* menu, select *Refresh from Activity Plan*.

Results

Your applicable surveys and activities appear under the *Surveys* and *Sales Activities* tabs as a result of rules.

5.5.1.2 Configure Automatic Refresh from Activity Plan

Administrators can use workflow rules to define when opportunities can be automatically refreshed to obtain an updated list of to-do surveys, tasks, appointments, and phone calls.

Context

By using workflow rules, applicable surveys and activities can be assigned on creating or saving an opportunity, or on a customized schedule.

Procedure

1. Go to ▶ *Administrator* ❯ *Workflow Rules* ❯, and create a new workflow rule.
2. Give a meaningful name in the *Description* field.
3. For *Business Object*, choose *Opportunity*.
4. For the *Timing* type, you can choose from *On Create Only*, *On Every Save*, and *Scheduled*. If the timing field is left blank, *On Every Save* is applied by default.

   This selection decides when your rule, in this case *Refresh from Activity Plan*, is triggered.
5. (Optional) Define conditions that you can also configure in the *Routing Rules* section in the *Activity Planner* work center.

6. For *Rule Type*, choose *Action* and select *Refresh from Activity Plan*.
7. Review and activate your workflow rule.

5.5.2 Opportunity Intelligence

Opportunity scoring leverages machine learning that is trained on your historical sales data to find patterns and predict the probability of closing a deal. With machine learning powered by SAP Leonardo, the score pane also shows you key factors that impact the resulting scores.

> i Note
>
> Machine learning is only available for the SAP Cloud for Customer Enterprise version, and requires activation by your administrators.

Related Information

Machine Learning in Opportunities

5.5.3 Assess Competitors

Keeping track of your competitors as well as competitor products in opportunities helps you assess your competitors and better evaluate your opportunities.

> i Note
>
> As prerequisites, your administrators must activate *Competitor* in the *Involved Parties* configuration so users can add such a role to an opportunity.

In an opportunity, you can navigate to the *Competitors* tab and add relevant competitors and competitor products from the master data maintained in the *Competitors* work center. The *Competitor Products* pane does not appear until at least one competitor has been added to the opportunity.

You may also have mandatory or voluntary competitor surveys or competitor product surveys predefined and assigned by your administrators to help you gain insights into your competitor performances.

Related Information

Add Surveys and Activities to Opportunities [page 346]

5.5.3.1 Configure Involved Parties

Administrators can maintain involved parties for opportunities by activating applicable party roles and determination steps.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◀. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Opportunities* ❯ *Involved Parties* ❯ *Maintain Involved Parties* ◀ to edit your involved parties.

Based on your business needs, you can *Exclude* activated party roles from realignment run or inbound integration scenarios, for example, when you replicate opportunities from ERP to SAP Cloud for Customer.

For customized party roles, there is an additional determination step called *Use Rules for <Party Role Name>*. This option allows you to default parties based on specific conditions that can be defined in ▶ *Administrator* ❯ *Sales and Campaign Settings* ❯ *Define Rules for Opportunity Parties* ◀.

Related Information

5.6 Plan Opportunity Revenue

SAP Sales Cloud offers you several tools to estimate your revenue based on your opportunities, compare the estimates against your revenue-based targets, and help you make best use of your available resources.

You can monitor your opportunities and analyze your sales performance on a real-time basis via sales pipeline reports that can be included on your home page or in the *Analytics* work center.

If you have confidence in closing certain opportunities, you can toggle on the *Publish to Forecast* option in the opportunity details so the values of those opportunities can be recognized in forecasts for further product planning.

Split Revenue [page 350]
> You can split revenue among sales members and recognize the individuals to whom the success of an opportunity can be attributed.

Schedule Revenue [page 350]
> You can schedule revenue over time and have a record of revenue for each distribution and accounting period.

Simulate Opportunity Pipeline [page 354]
> Pipeline simulation gives you a visual snapshot of where your prospects are in the sales pipeline. It also allows you to explore what-if scenarios by changing key values in opportunities and see simulated impacts on your revenue in real time.

(Deprecated) Work with SAP Intelligent Sales Execution (Datahug) in Opportunities [page 355]

With Datahug offered by SAP Intelligent Sales Execution, you can explore a new approach to managing your pipeline and customer relationship for opportunities.

5.6.1 Split Revenue

You can split revenue among sales members and recognize the individuals to whom the success of an opportunity can be attributed.

Provided your administrators have enabled revenue scheduling and revenue splits, you can add revenue partners under the *Revenue Splits* tab and maintain their contributions to the opportunity revenue by *Split Percentage*.

Once you have included all the revenue partners, you can schedule revenues accordingly. *Revenue Amount* for each partner will be empty until at least one relevant revenue schedule is created.

> **i Note**
>
> It is recommended that you finalize the revenue splits before you proceed to schedule revenues. Any changes to a *Split Percentage* field will result in a deletion of existing schedules.

If the *Split Percentage* column is not visible, you can use *Personalization* or ask your administrators to *Adapt* the master layout.

Related Information

5.6.1.1 Configure Revenue Splits

Administrators can enable users to split revenue per opportunity among sales team members through configuration.

Go to *Business Configuration* *Implementation Projects* . Select your project and navigate to *Edit Project Scope* *Questions* *Sales* *New Business* *Opportunities* to find the corresponding question about splitting revenue among sales team members.

5.6.2 Schedule Revenue

You can schedule revenue over time and have a record of revenue for each distribution and accounting period.

Once your administrators have enabled revenue scheduling, you can schedule revenue among various revenue partners. Revenue can be scheduled either at the header level or at the product level, depending on whether the *Schedule Revenue at Header* flag is toggled on or off in the opportunity details.

5.6.2.1   Schedule Revenue at the Header Level

Under the *Revenue Splits* tab, you can schedule revenue for respective revenue partners between predefined revenue start and end dates.

As a prerequisite, at least one revenue partner must be maintained before revenue schedule becomes available.

When you select a revenue partner and add a new revenue schedule, the total amount by default displays the expected value that the partner has contributed to the revenue. You also have the option to use the negotiated value instead for calculation. Upon creation, the revenue will be distributed evenly throughout the defined period and based on the frequency you choose.

5.6.2.2   Schedule Revenue at the Product Level

Under the *Products* tab, you can schedule revenue for each product line item and applicable revenue partners between predefined revenue start and end dates.

As a prerequisite, at least one product item must be maintained before revenue schedule becomes available.

When you select a product and add a new revenue schedule, the total amount by default displays the negotiated value that the partner has contributed to the revenue. Upon creation, the revenue will be distributed evenly throughout the defined period and based on the frequency you choose.

When revenue is scheduled at the product level, a read-only revenue schedule table will appear under the *Revenue Splits* tab and show the aggregate of schedules of all products for each revenue partner. If no partner is maintained under the *Revenue Splits* tab, the opportunity owner will be defaulted as the revenue partner.

5.6.2.3 Schedule Revenue upon Quantity Distribution

You can schedule item quantity to track order delivery under the *Products* tab if your administrators have enabled product quantity scheduling.

When you select a product and add a new item quantity schedule, you can either allow the system to distribute quantity evenly throughout the defined period and based on the frequency you choose, or you can manually apply a fixed quantity of products to each distribution period. For the latter option, you need to select *Distribution Per Period* as the quantity schedule type and define *Quantity Per Period*. If the field is not available, you can use *Personalization* or ask your administrators to *Adapt* the master layout.

When an item quantity schedule is created, a revenue schedule will be derived accordingly for you to further track payments for each product distribution. The revenue schedule can also be updated upon any changes made to the quantity schedule if your administrators have enabled the feature in scoping.

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5.6.2.4 Calcuate Negotiated Value Based on Status

You use status (standard or custom) to control the *Total Negotiated Value* of an opportunity.

5.6.2.4.1 Configure Total Negotiated Value for Standard and Custom Status

To control *Total Negotiated Value* for standard status, follow these steps:

1. Navigate to ▶ *Business Configuration* ❯ *Implementation Projects* ▶ and select your project.
2. Click ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Opportunities* ❯ *Maintain Reasons* ▶ and check the column *Reduce Total Negotiated Value*.

To control *Total Negotiated Value* for custom status, follow these steps:

1. Navigate to ▶ *Business Configuration* ❯ *Implementation Projects* ▶ and select your project.
2. Click ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Opportunities* ❯ *Maintain Custom Status* ▶ and check the column *Reduce Total Negotiated Value*.

5.6.2.5 Configure Revenue Scheduling

Administrators can enable users to schedule revenue on a monthly, quarterly, or yearly basis through configuration.

Go to ▶ *Business Configuration* ▷ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ▷ *Questions* ▷ *Sales* ▷ *New Business* ▷ *Opportunities* ▶ to find the corresponding question about revenue scheduling.

5.6.2.6 Configure Product Quantity Scheduling

Administrators can enable revenue scheduling by item quantity distribution and set up the solution to automatically update the revenue schedule when there is a change in the quantity schedule.

Go to ▶ *Business Configuration* ▷ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ▷ *Questions* ▷ *Sales* ▷ *New Business* ▷ *Opportunities* ▶ to find the two corresponding questions about quantity scheduling.

> **i Note**
>
> Changing in the revenue schedule does not have an impact on the quantity schedule.

5.6.3 Simulate Opportunity Pipeline

Pipeline simulation gives you a visual snapshot of where your prospects are in the sales pipeline. It also allows you to explore what-if scenarios by changing key values in opportunities and see simulated impacts on your revenue in real time.

The solution provides three view options for pipeline simulation.

- *Pipeline Bar Chart*: The bar chart helps you monitor opportunities as they move through sales phases. This view helps you identify gaps in the pipeline and better prioritize your opportunities.
- *Pipeline Bubble Chart*: The bubble chart presents each opportunity in three dimensions. From this view, you can understand how big the deal is, where the deal resides in the pipeline, and how likely it will be closed. With such information, you can increase business efficiency by focusing on opportunities with higher success probability.
- *Won vs. Expected*: The chart displays the value of deals you won or expect to win by quarter. In the advanced search, you can also enable a graphic option called *Show My Targets* to include target plans that have been assigned to you or your team in the given period. With a complete view of targets and actuals, you can more easily tell how close you are to reach your sales quota.

Click *Start Simulation* to activate the simulation mode. You can modify editable fields for any of your listed opportunities and see how those changes can influence your pipeline. If you are satisfied with the simulated result, you can save the changes to your opportunities. Otherwise, you can cancel simulation to discard the changes.
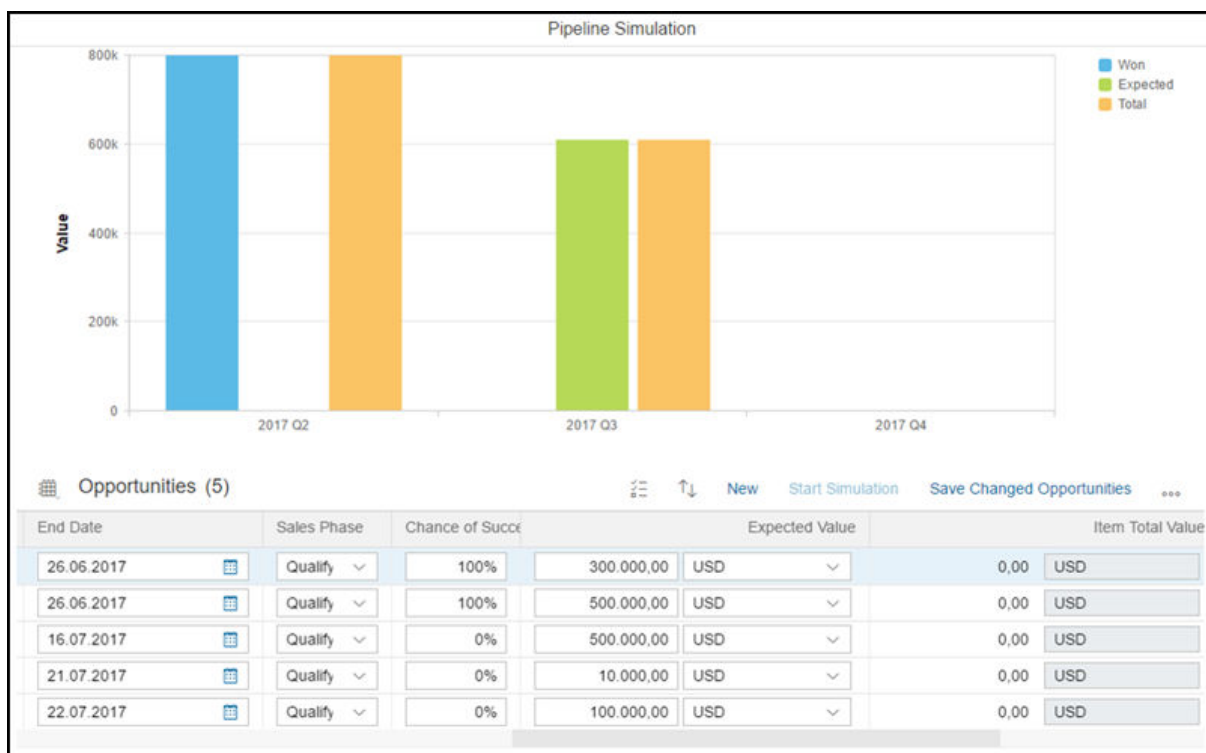
5.6.4 (Deprecated) Work with SAP Intelligent Sales Execution (Datahug) in Opportunities

With Datahug offered by SAP Intelligent Sales Execution, you can explore a new approach to managing your pipeline and customer relationship for opportunities.

> **i** Note
>
> As of November 2020, SAP Intelligent Sales Execution (Datahug) is discontinued as a stand-alone product. Customers that have purchased the license can continue using the product. SAP will honor existing product subscriptions until the end of your current contract term.

Datahug provides a graphical visualization of your pipeline, and helps you understand the true health of your opportunities and close more deals in less time. As a sales manager, you can slice and dice your pipeline using a variety of key filters like region or opportunity type. As a sales representative, you can easily focus on deals with a high value but a low deal score and take actions to get these deals back on track.
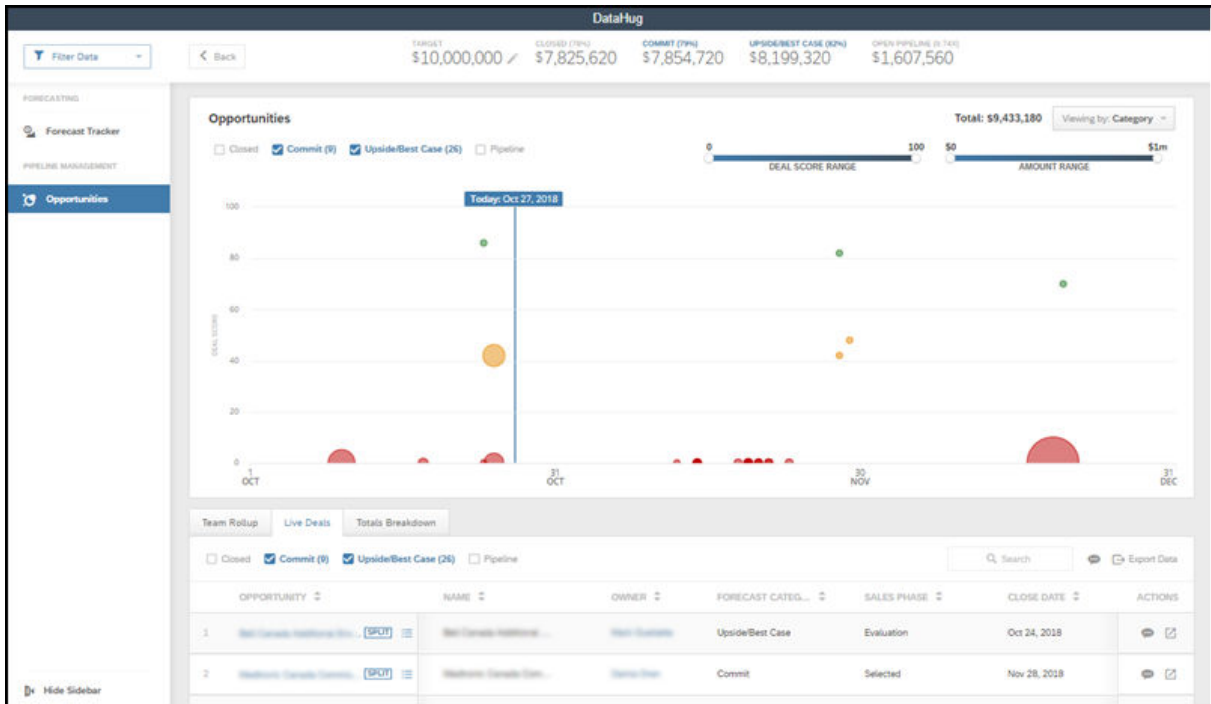
By connecting to your e-mail server, Datahug can identify relationship data points and help you build a better understanding of your customers. You can obtain details such as the last and next touchpoints with the customer, best connected colleague . Datahug also tells you who you know at the company is not yet maintained in the system. Based on the relationship strength, Datahug can automatically create contacts for you.
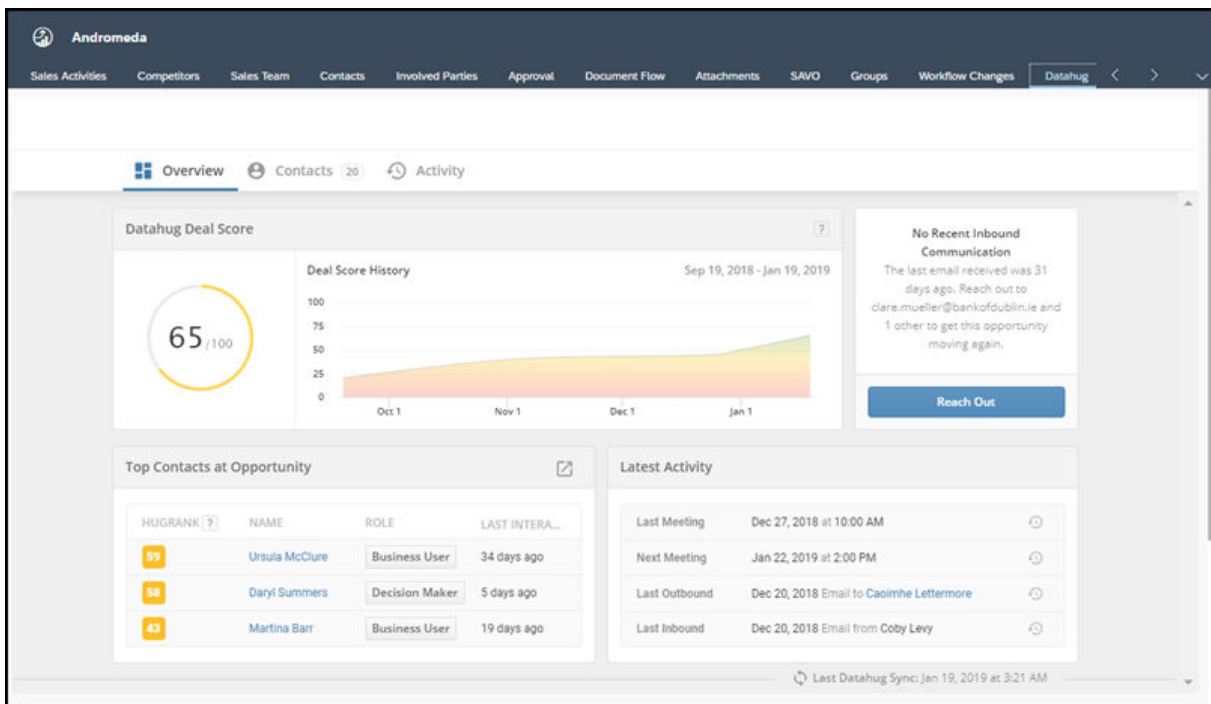
> **i** Note
>
> To use Datahug, a separate license is required from SAP Intelligent Sales Execution.

Once enabled by your administrator, Datahug is available as a separate work center in the navigation menu, as well as a tab in accounts, contacts, and opportunities. You can manage pipeline in the *Datahug* work center and customer relationship in the detail view of each opportunity.

For more information, please check out SAP Intelligent Sales Execution.

Related Information

(Deprecated) Work with SAP Intelligent Sales Execution (Datahug) in Forecasting [page 1114]

5.6.4.1   Configure SAP Intelligent Sales Execution (Datahug) for Opportunities

Administrators can add Datahug to your project scope and enable users to manage pipeline and customer relationship using Datahug.

Prerequisites

> **i** Note
>
> To use Datahug, a separate license is required from SAP Intelligent Sales Execution.

Procedure

1. Go to ▶ *Business Configuration* ❯ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Communication and Information Exchange* ❯ *Integration with External Applications and Solutions* ❯ *Integration Scenarios with Cloud Solutions from SAP* ▶ to find the corresponding question about enabling Datahug.

2. Go to ▶ *Administrator* ❯ *Sales and Campaign Settings* ❯ *Datahug Settings* ❯ *Open Datahug Administrator* ▶ and provide an API key and secret for accessing Datahug.

3. Assign the *Datahug* work center view (ID: *COD_DATAHUG_WCF*) to appropriate business users or roles for pipeline and forecast management.

   For more details, please check Create Business Roles and Assign Work Centers and Views.

4. Go to the detail view of an opportunity, *Adapt* the master layout and add the *Datahug* tab to opportunities.

   Datahug is also available for accounts and contacts.

5. To add contacts from Datahug to opportunities, you must create a contact role in opportunities configuration. Go to ▮▶ *Business Configuration* ❯ *Implementation Projects* ◢. Select your project and navigate to ▮▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Opportunities* ❯ *Maintain Contact Roles* ◢ and add a row with code **ZGHUG**, as well as a description for Datahug.

6. To allow Datahug to automatically add contacts based on touch points identified via e-mail server, contact SAP Intelligent Sales Execution for further configurations.

   For more information, please check out Prepackaged Integration with SAP Intelligent Sales Execution (SAP Datahug).

5.7 Opportunity Approval Process

Opportunities can be submitted for approval when they fulfill certain conditions, provided your administrators have enabled and configured the multi-step approval process for opportunities.

The opportunity approval process can contain multiple steps with different conditions and approvers. Once an opportunity meets the conditions defined in **any** one of the steps, the opportunity can be manually or automatically submitted for approval. If the opportunity meets the conditions defined in several steps simultaneously, the system checks each step in sequence upon approval submission. The approval checking proceeds to the next approval step only when the previous step has been granted.

Submit Opportunities for Approval [page 358]
    When an opportunity meets approval conditions predefined by your administrators, it can be manually or automatically submitted for approval.

Restart Approval Process for Approved Opportunities [page 360]
    When you modify an approval relevant field in an approved opportunity, the approval status gets reset to *Not Started*. In addition, the system reevaluates all the approval relevant fields. If the modified opportunity fulfills approval criteria predefined by your administrators, a reapproval process can be triggered.

Approve Opportunities via E-Mail [page 361]
    Approvers, as well as delegates assigned to approvers, can approve opportunities via e-mail, without having to log into the system.

5.7.1 Submit Opportunities for Approval

When an opportunity meets approval conditions predefined by your administrators, it can be manually or automatically submitted for approval.

> **i** Note
>
> As prerequisites, your administrators must enable and configure the multi-step approval process for opportunities, and optionally enable automatic submission for opportunity approval.

When an approval process triggers:

- For opportunities that must be manually submitted for approval, the *Submit for Approval* option becomes available in the *Actions* menu at the bottom right.
- For opportunities that are automatically submitted for approval, the opportunity is sent to the approver when you save the change that triggers the approval process.

> **i Note**
>
> If your opportunity has met approval conditions yet cannot be submitted for approval, please contact your administrators and check:
>
> - whether approvers are defined
> - whether approval submission is allowed for the applicable custom status that the opportunity resides in

Once your opportunity is submitted for approval, the approval status of your opportunity changes to *In Approval*.

For an opportunity that is in approval, you can withdraw it from approval if needed. And later, if you make any changes that fulfill the predefined conditions once again, the opportunity that is in *Withdrawn* status can be resubmitted for approval.

Approver, as well as delegates assigned to approvers, can approve an opportunity or send it back for revision under the *Approval* tab, in *Notifications*, or via e-mail.

5.7.1.1 Configure Multi-Step Approval Process

Administrators can enable a multi-step approval process for opportunities through configuration.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* 〉. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Sales* 〉 *New Business* 〉 *Opportunities* 〉 to find the corresponding scoping question about enabling multi-step approval process.

Upon activation, you can further configure process details in ▶ *Administrator* 〉 *Approval Processes* 〉.

5.7.1.2 Configure Automatic Submission for Approval

Administrators can set up the solution to automatically submit opportunities for approval when the opportunities have fulfilled predefined conditions.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* 〉. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Sales* 〉 *New Business* 〉 *Opportunities* 〉 to find the corresponding scoping question about automatically submitting opportunities for approval.

5.7.2 Restart Approval Process for Approved Opportunities

When you modify an approval relevant field in an approved opportunity, the approval status gets reset to *Not Started*. In addition, the system reevaluates all the approval relevant fields. If the modified opportunity fulfills approval criteria predefined by your administrators, a reapproval process can be triggered.

> **i Note**
>
> As prerequisites, your administrators must complete the following configurations:
>
> * Enable the multi-step approval process for opportunities
> * Define the multi-step approval process for opportunities, including approval conditions and approvers
> * Enable resetting approval status in approved opportunities
> * (Optional) Enable automatic submission for opportunity approval

When a reapproval process triggers:

* For opportunities that must be manually submitted for approval, the *Submit for Approval* option becomes available in the *Actions* menu at the bottom right.
* For opportunities that are automatically submitted for approval, the opportunity is sent to the approver **next** time you save the opportunity.

> **i Note**
>
> During reapproval, the system goes through all the applicable approval steps, including steps that have been checked in last approval and are still valid in this approval.

> **! Restriction**
>
> If any of the following account fields are defined as approval conditions, changes to them in an approved opportunity do **not** lead to resetting the approval status.
>
> * ABC Classification
> * Industry
> * Prospect
> * All the custom extension fields defined in accounts

5.7.2.1 Configure Multi-Step Approval Process

Administrators can enable a multi-step approval process for opportunities through configuration.

Go to ▌ *Business Configuration* ⟩ *Implementation Projects* ▐. Select your project and navigate to ▌ *Edit Project Scope* ⟩ *Questions* ⟩ *Sales* ⟩ *New Business* ⟩ *Opportunities* ▐ to find the corresponding scoping question about enabling multi-step approval process.

Upon activation, you can further configure process details in ▌ *Administrator* ⟩ *Approval Processes* ▐.

5.7.2.2 Configure Automatic Submission for Approval

Administrators can set up the solution to automatically submit opportunities for approval when the opportunities have fulfilled predefined conditions.

Go to ▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▶ *Edit Project Scope* ❭ *Questions* ❭ *Sales* ❭ *New Business* ❭ *Opportunities* ❭ to find the corresponding scoping question about automatically submitting opportunities for approval.

5.7.2.3 Configure Resetting Approval Status in Approved Opportunities

Administrators can enable users to restart approval process on changes to approval relevant fields in an approved opportunity.

Go to ▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▶ *Edit Project Scope* ❭ *Questions* ❭ *Sales* ❭ *New Business* ❭ *Opportunities* ❭ to find the corresponding question about enabling reapproval for approved opportunities.

> ! Restriction
>
> If any of the following account fields are defined as approval conditions, changes to them in an approved opportunity do **not** lead to resetting the approval status.
>
> - ABC Classification
> - Industry
> - Prospect
> - All the custom extension fields defined in accounts

5.7.3 Approve Opportunities via E-Mail

Approvers, as well as delegates assigned to approvers, can approve opportunities via e-mail, without having to log into the system.

Before making the approval decision, approvers can review opportunity details using the summary PDF attached in the approval e-mail.
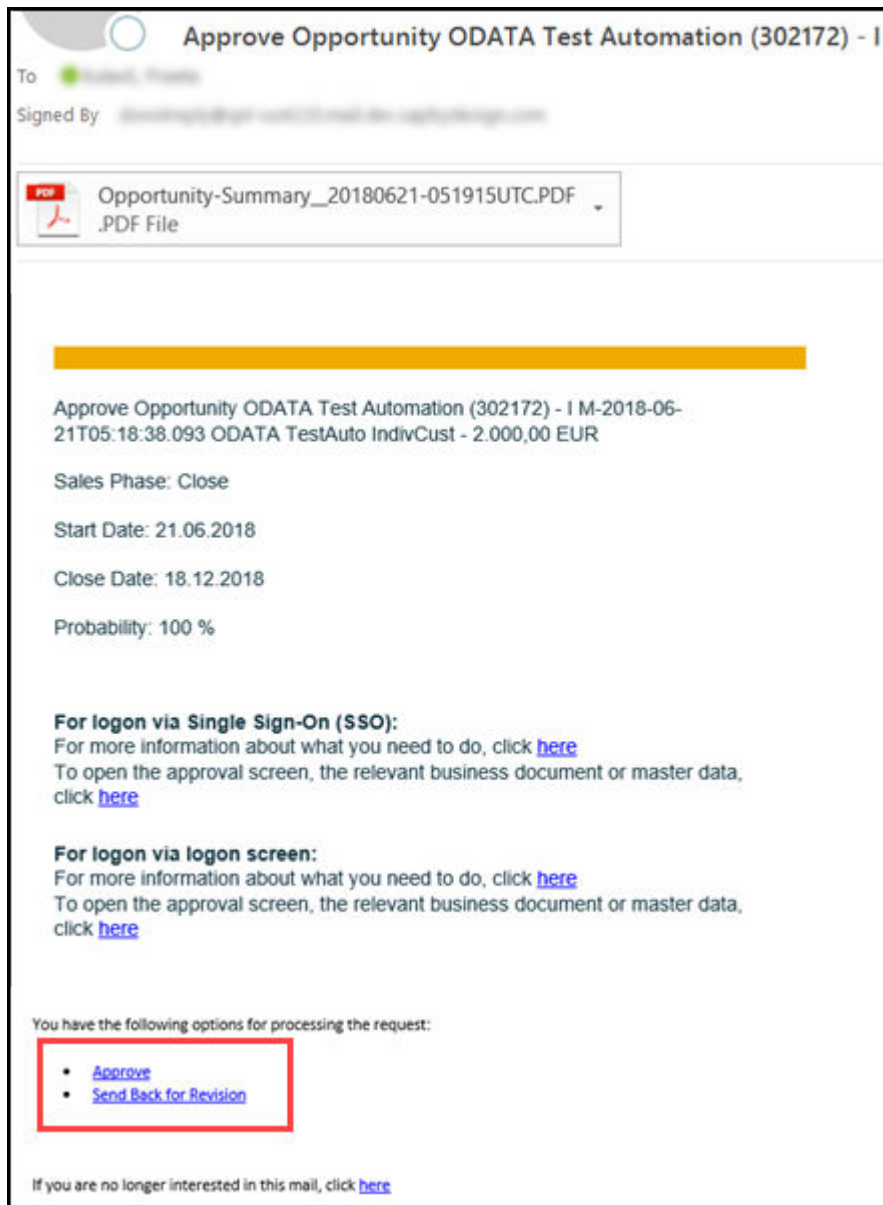
As prerequisites, your administrators must complete several configurations and make sure that:

- the involved employees are business users and have valid e-mail addresses
- the CA certificates from the employees are uploaded to the system for outgoing e-mails
- each involved employee must subscribe to the e-mail notifications by opening the *Notifications* view and choosing *Subscribe to E-Mail*
- the e-mail clients of the involved employees have enabled the receipt of encrypted e-mails

5.7.3.1 Configure Multi-Step Approval Process

Administrators can enable a multi-step approval process for opportunities through configuration.

Go to ▷ *Business Configuration* > *Implementation Projects* ▷. Select your project and navigate to ▷ *Edit Project Scope* > *Questions* > *Sales* > *New Business* > *Opportunities* ▷ to find the corresponding scoping question about enabling multi-step approval process.

Upon activation, you can further configure process details in ▷ *Administrator* > *Approval Processes* ▷.

5.7.3.2 Configure Automatic Submission for Approval

Administrators can set up the solution to automatically submit opportunities for approval when the opportunities have fulfilled predefined conditions.

Go to ▷ *Business Configuration* > *Implementation Projects* ▷. Select your project and navigate to ▷ *Edit Project Scope* > *Questions* > *Sales* > *New Business* > *Opportunities* ▷ to find the corresponding scoping question about automatically submitting opportunities for approval.

5.7.3.3 Configure E-Mail Encryption and Signature Check

Administrators can enable the solution to decrypt and check signatures for incoming e-mails, as well as encrypt and sign signatures for outgoing e-mails.

Go to ▷ *Business Configuration* > *Implementation Projects* ▷. Select your project and navigate to ▷ *Edit Project Scope* > *Questions* ▷ > *Built-in Services and Support* > *System Management* > *Security* ▷ to find the corresponding question and enable e-mail encryption and signature check.

Go to ▷ *Business Configuration* > *Implementation Projects* ▷. Select your project and navigate to ▷ *Open Activity List* > *Fine-Tune* > *E-Mail Encryption and Signature Check* ▷ to check the followings:

- Under the *Incoming E-Mail* section, the signature of *Business Task Management: Email Notifications* scenario is set to *Check*.
- Under the *Outgoing E-Mail* section, the *Business Task Management: Email Notifications* scenario is maintained.

5.7.3.4 Configure E-Mail and Fax Settings for E-Mail Notifications

Administrators can specify the company domain and define default sender address for e-mail notifications.

Go to ▷ *Business Configuration* > *Implementation Projects* ▷. Select your project and navigate to ▷ *Open Activity List* > *Fine-Tune* > *E-Mail and Fax Settings* ▷ to do the followings:

- enter your company domain, such as `example.com`, as the *Allowed Sender E-Mail Domain*
- define *Default Sender Address*
- select the *Send all e-mails to business partners* option if you are in a non-productive system

5.7.3.5 Configure Secure/Multipurpose Internet Mail Extensions (S/MIME)

Administrators can upload certificates for all employees that need e-mail notifications.

Procedure

1. Each employee should download personal SSO certificate via Internet Explorer.
   a. In the Internet Explorer, go to ▶ *Tools* ❯ *Internet Options* ❯ *Content* ❯ *Certificates* ❯ and double-click the SSO certificate.
   b. Click ▶ *Details* ❯ *Copy to File...* ❯.
   c. Follow the *Certificate Export Wizard*. Do not export the private key and choose file format *Base-64 Encoded X.509*.
   d. Export and save the certificate locally on your computer.
2. Each personal SSO certificate should be uploaded to corresponding business user in the solution.
   a. Go to ▶ *Administrator* ❯ *General Settings* ❯ *Business Users* ❯ and select the desired user.
   b. Make sure that the user has a valid e-mail address and edit the user's *Attributes*.
   c. Click ▶ *Actions* ❯ *Manage Certificates* ❯ to upload the personal S/MIME certificate.
3. Upload CA certificates for all involved employees to receive e-mail notifications.
   a. Go to ▶ *Administrator* ❯ *Common Tasks* ❯ and select *Configure S/MIME*.
   b. Under the *Incoming E-Mail* tab, select the generic incoming e-mail scenario *Business Task Management: Email Notifications*.
   c. Click *Upload CA Certificate* for each involved employee.
4. Install CA certificate of the system e-mail address into your local certificate store.
   a. Go to ▶ *Administrator* ❯ *Common Tasks* ❯ and select *Configure S/MIME*.
   b. Under the *Outgoing E-Mail* tab, make sure that there is a valid certificate for the system sender address.
   c. Under *SAP Trust Center Service*, click *Link to SAP CA* to open *SAP Trust Center Service*.
   d. Scroll down to the *Root Certificates* section and click *SAP Passport CA Certificate*.
   e. Click *Install Certificate...* and follow the wizard by clicking *Next*.
   f. Select *Place all certificate in the following store* and click *Browse...*.
   g. Select *Trusted Root Certification Authorities* and click *OK*.
   h. Click *Next* and *Finish*.
5. Under the *Activate S/MIME* tab, select the options for *Check Signature of Incoming E-Mails*, *Encrypt Outgoing E-Mails*, and *Signing Outgoing E-Mails*.

5.8 Close Opportunities

You can close an opportunity by simply changing its status to won or lost.

When your opportunities are getting close to win, your customers may ask for quotes and place orders. Such sales quotes and sales orders can be easily created as follow-up items under the *Sales Documents* tab in opportunities.

5.9 Opportunities Offline

In your solution, the following items can be used offline.

Available Fields in Opportunity Quick Create Offline [page 365]
    The table lists available fields during opportunity creation in offline mode.

Available Fields in Opportunity Detail View Offline [page 367]
    The table lists available fields in the detail view of opportunities in offline mode.

Available Actions in Opportunities Offline [page 372]
    The table lists available actions you can take in opportunities in offline mode.

5.9.1 Available Fields in Opportunity Quick Create Offline

The table lists available fields during opportunity creation in offline mode.

Section	Field	Availability Offline	Default/Determination Offline
Header General	Name	Y	N
	Document Type	Y	Y
	Account	Y	N
	Primary Contact	Y	Y
	Source	Y	N
	Priority	Y	N
	Status (Standard)	NA	Y
	Custom Status	Y	Y

Section	Field	Availability Offline	Default/Determination Offline
	Reason for Status	Y	N
	Sales Cycle	Y	Y
	Sales Phase	Y	Y
	Probability	Y	Y
	Expected Value	Y	N
	Total Negotiated Value	Y	N
	Weighted Value	Y	N
	Start Date	Y	Y
	Close Date	Y	Y
	Publish to Forecast	Y	N
	Forecast Category	Y	N
	Sales Organization	Y	Y
	Sales Group	Y	N
	Sales Office	Y	N
	Distribution Channel	Y	Y
	Division	Y	Y
	Territory	Y	Y
	Campaign	N	N
	Sales Unit	Y	Y
	Notes	Y	N
	Category	Y	N
	Owner	Y	Y
Products	ID	Y	N
	Description	Y	N
	Category	Y	N

Section	Field	Availability Offline	Default/Determination Offline
	Quantity	Y	N
	Negotiated Value	Y	N

5.9.2 Available Fields in Opportunity Detail View Offline

The table lists available fields in the detail view of opportunities in offline mode.

Tab	Section	Field	Display	Edit (direct OR via actions OR via navigation)
Overview	Header	Name	Y	Y
		Document Type	Y	NA
		Account	Y	Y
		Primary Contact	Y	Y
		Source	Y	Y
		Priority	Y	Y
		Status (Standard)	Y	NA
		Custom Status	Y	Y
		Reason for Status	Y	Y
		Consistency Status	Y	N
		Sales Cycle	Y	NA
		Sales Phase	Y	Y
		Days in Sales Phase	Y	N
		Probability	Y	Y
		Expected Value	Y	Y
		Total Negotiated Value	Y	N
		Weighted Value	Y	N

Tab	Section	Field	Display	Edit (direct OR actions OR via navigation)
		Start Date	Y	Y
		Close Date	Y	Y
		Revenue Start Date	Y	Y
		Revenue End Date	Y	Y
		Publish to Forecast	Y	Y
		Forecast Category	Y	Y
		Sales Organization	Y	Y
		Sales Group	Y	Y
		Sales Office	Y	Y
		Distribution Channel	Y	Y
		Division	Y	Y
		Territory	Y	Y
		Campaign	Y	N
		Sales Unit	Y	Y
		Notes	Available only when Note History is not enabled	Available only when Note History is not enabled
		Category	Y	Y
		Owner	Y	Y
	Products	ID	Y	N
		Description	Y	N
		Category	Y	N
		Quantity	Y	N
	Sales Team	Role	Y	N
		Name	Y	N
		E-Mail	Y	N

Tab	Section	Field	Display	Edit (direct OR actions OR via navigation)
	Contacts	Name	Y	N
		Primary Contact Indicator	Y	N
		E-Mail	Y	N
	Leads	Name	Y	N
		Account	Y	N
		Created On	Y	N
		Source	Y	N
Products	Products	Product ID	Y	Y
		Description	Y	Y
		Product Category	Y	N
		Quantity	Y	Y
		Negotiate Value	Y	Y
		Revenue Start Date	Y	Y
		Revenue End Date	Y	Y
		Proposed Value	Y	N
		Notes	Y	Y
Activities	Appointments	Subject	Y	N
		Status	Y	N
		Sales Phase	Y	N
		Start Date/Time	Y	N
		End Date/Time	Y	N
		Owner	Y	N
	Visits	Subject	Y	N
		Status	Y	N

Tab	Section	Field	Display	Edit (direct OR actions OR via navigation)
		Sales Phase	Y	N
		Start Date/Time	Y	N
		End Date/Time	Y	N
		Owner	Y	N
	Emails	Subject	Y	N
		Status	Y	N
		Sales Phase	Y	N
		Start Date/Time	Y	N
		Owner	Y	N
	Phone Calls	Subject	Y	N
		Status	Y	N
		Sales Phase	Y	N
		Start Date/Time	Y	N
		Owner	Y	N
	Tasks	Subject	Y	N
		Status	Y	N
		Sales Phase	Y	N
		Start Date/Time	Y	N
		Due Date/Time	Y	N
		Owner	Y	N
Sales Team	Sales Team	Role	Y	Y
		Name	Y	N
		E-mail	Y	N
		Phone	Y	N
Contacts	Contacts	Name	Y	N

Tab	Section	Field	Display	Edit (direct OR actions OR via navigation)
		Function	Y	N
		Phone	Y	N
		Mobile	Y	N
		E-Mail	Y	N
		Primary Contact Indicator	Y	Y
		Department	Y	N
Involved Parties	Involved Parties	Role	Y	N
		Name	Y	N
		Address	Y	N
		E-Mail	Y	N
		Primary Contact Indicator	Y	Y
		Phone	Y	N
Attachments	Attachments	Title	Y	N
		Type	Y	N
		Changed On	Y	N
		Changed By	Y	N
Sales Documents	Sales Quote	ID	Y	N
		Description	Y	N
		External Reference	Y	N
		Date	Y	N
		Primary	Y	N
		Owner	Y	N
	Sales Order	ID	Y	N
		Description	Y	N

Tab	Section	Field	Display	Edit (direct OR actions OR via navigation)
		External Reference	Y	N
		Date	Y	N
		Owner	Y	N
Tickets	Tickets	ID	Y	N
		Subject	Y	N
		Priority	Y	N
		Status	Y	N
		Created On	Y	N
		Assigned To	Y	N
Related Opportunities	Related Opportunities	Name	Y	N
		Account	Y	N
		Owner	Y	N
		Relationship	Y	N
		Created On	Y	N
Surveys	Surveys	Name	Y	Y
		Status	Y	Y
		Category	Y	Y

5.9.3 Available Actions in Opportunities Offline

The table lists available actions you can take in opportunities in offline mode.

Object	Global / Tab	Actions	Offline Availability
Opportunity	Global	Set as Open	Available only when Custom Status is not used

Object	Global / Tab	Actions	Offline Availability
		Set as In Process	Available only when Custom Status is not used
		Set as Won	Available only when Custom Status is not used
		Set as Lost	Available only when Custom Status is not used
		Set as Stopped	Available only when Custom Status is not used
	Sales Documents	New	Y
	Ticket	New	N
	Attachments	Add	Y
	Related Opportunities	Add	Y
		New	Y
	Products	Add	Y
		Delete	N
	Activities	New	Y (Except E-Mails)
	Sales Team	Add	Y
		Delete	Y
	Involved Party	Add	Y
		Delete	Y
	Contact	Add	Y
		Delete	Y

5.10 Opportunities FAQ

This section answers commonly asked questions about opportunities.

5.10.1 How do I include relevant opportunities in forecasts?

You should maintain these fields in your opportunities so they can be included in forecasts.

- *Publish to Forecast*: This flag is toggled on.
- *Owner*: You are the owner of the opportunities.
- *Sales Unit*: This should be linked to the owner and match the forecast sales unit.
- *Start Date* and *Close Date*: They should stay within the forecast period.

5.10.2 Why doesn't probability update when I change the sales phase?

The system will stop automatically updating the *Probability* field upon changes to the *Sales Phase* field if a manual change has been done.

5.10.3 Why do I see opportunities owned by others in *My Opportunities*?

My Opportunities query displays all the opportunities that you are assigned as a party, not only the ones that you own.

5.10.4 Why can't I submit opportunities for approval when conditions are met?

If an opportunity has met approval conditions yet cannot be submitted for approval, administrators can check whether approvers are properly defined in *Approval Process* or if approval submission is allowed for the applicable custom status that the opportunity resides in.

Related Information

Configure Custom Status [page 330]

5.10.5 How do I restrict access to homeless opportunities?

As administrators, you can in general restrict access to data records that do not contain any access relevant content. In doing so, homeless opportunities will not be visible to business users with restricted access to opportunities.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❭. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Built-in Services and Support* ❯ *System Management* ❯ *User and Access Management* ❭ to find the corresponding scoping question.

If you have also enabled *Compatibility mode for Access Context 1015* following the path above, opportunities that contain applicable sales area data but have no territories or parties assigned will also be accessible to business users with restricted access to opportunities.

5.10.6 How do I delete a custom status in opportunities?

As administrators, you can delete a custom status as long as it is not in use.

You can perform a search in opportunities based on the custom status to see if there is any data consuming the status.

6 Contracts

Learn about sales and service contracts which allow you to quickly create and maintain agreements, maintain contracts header, item, and covered objects, as well as create contracts from opportunities and sales orders.

> ### i Note
>
> Administrators and end-users will find details for both service and sales contracts in this solution guide. Any pertinent details that apply strictly to service contracts or solely for sales contracts will clearly identified. This document in available in both the Solution Guide for SAP Cloud for Sales as well as the Solution Guide for SAP Cloud for Service.
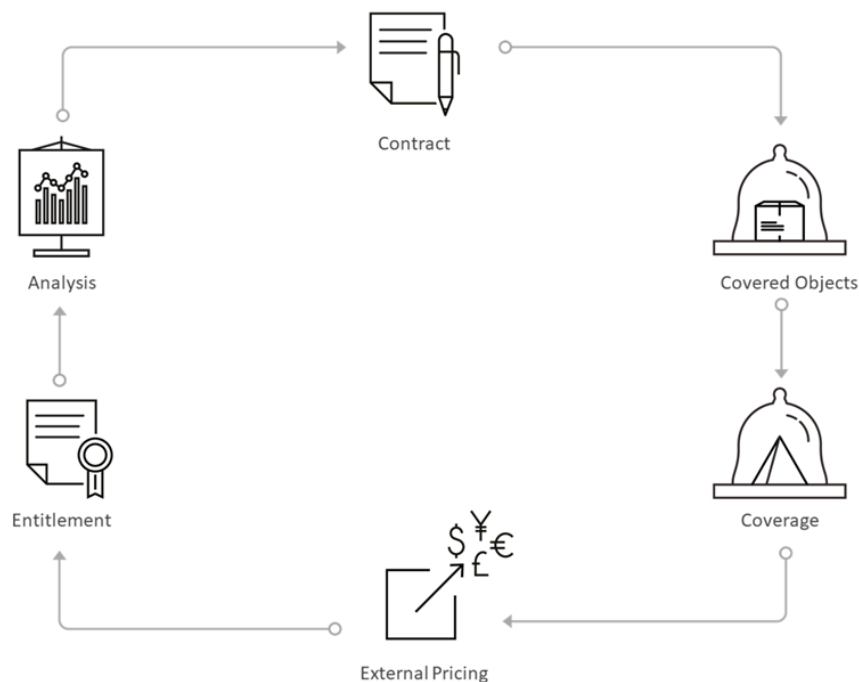
With service contracts you can manage customer support agreements between you and your customers for items according to the warranty coverage. With the solution you can track details about the type of support that your customers are eligible for as long as the customer has an active contract. Your contract administration team will define the contract details, such as entitlements (for service contracts), limited products, and pricing. In addition, depending on the contract template, other details such as support coverage based on hours, service level agreements (SLAs), as well support types may also be included in the contract.

Use sales contracts to determine contracts for quantity sales contracts with SAP ERP integration and contract determination on item level for quotes and orders. One of the principle features of sales contracts includes bi-directional quantity sales contract integration with SAP ERP. In addition, with sales contracts, contract determination on item level for orders and quotes is also available.

Whether you belong to the service team or sales team, as the end-user responsible for a customer contract, you simply need to create a contract from a ticket, opportunity, or a customer quote. From there, when a customer contacts you with an issue, the required information, such as contract subject matter, covered objects, signature date and validity period are bundled in one place.

The *Contracts* work center supports you in creating service and sales contracts based on the required details as well as displaying overview details about active contracts. As soon as you have finalized a contract with a customer and it is active, the contract is determined during ticket creation and automatically added to the ticket. If the contract contains SLAs (service level agreements), you will see them after the determination in the ticket.

As a manager, with contract analysis you can view and analyze contract data such as, contract items, contract value, release history, and more.

6.1   Scope and Configure Service and Sales Contracts

Administrators can configure service and or sales contracts using scoping, scoping questions, and fine-tuning activities.

Go to ▐▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▐▶ *Edit Project Scope* ❭ *Questions* ❭ *Service* ❭ *Entitlement Management* ❭ *Service Contract Management* ❭ *Questions* ❭ *Service Contract Management.* ❭ Place a checkmark in the desired service contract sections and save your entries.

Administrators can configure sales contracts using scoping, scoping questions, and fine-tuning activities.

Go to ▐▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▐▶ *Edit Project Scope* ❭ *Questions* ❭ *Sales* ❭ *New Business* ❭ *Sales Contracts* ❭ *Business Option: Sales Contracts* ❭ *Questions* ❭. Place a checkmark in the desired sections and save your entries.

6.1.1 Configure Document Types

Administrators can create custom document types to streamline filtering, define reports, or facilitate assignments.

Administrators set-up documents types for sales and service contracts to enable data exchange with external applications such as SAP ERP. Some standard document types are delivered by the solution. Administrator can create document types that are transferable to SAP ERP configured as *External Data* in the solution.

Go to ▐▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▐▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Opportunities* ❭ *Document Types* ❭ *Maintain Document Types* ❭ to edit your opportunity types.

6.1.2 Define Quote and Contract Document Types for SAP ERP Integration

Administrators can define quote, sales and service contract document types for SAP ERP with SAP Cloud for Customer quotes, sales, and service contracts.

The fine-tuning of *Document Types* allows multiple settings for SAP ERP integration. You can leverage each document type as a special business scenario/use case. Depending on your requirements, you can create multiple document types for your desired business scenarios.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❚. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Activity Name: Sales Contracts, Service Contract, or Sales Quotes* ❯ *Document Types* ❯ *Maintain Document Types.* ❚ Select your *Document Type* and modify it to your business solution requirements.

External Pricing – A check in the box enables an external application such as SAP ERP, synchronously requests prices. The transaction simulation determines not only pricing, but sales quotes, free goods, product availability, and credit status based on SAP ERP customizing for this document type. From SAP Cloud for Customer, you trigger the external application, by clicking ▶ *Action* ❯ *Request External Pricing.* ❚

Replication – Administrators define the sales quote and the sales and service contract transfer behavior from your SAP on-premise system to your cloud solution by selecting one of the following options:

- *Bi-directional* – Sales quote edits in your cloud solution are replicated to your SAP on-premise system, syncing both quotes.

  > → Remember
  >
  > Your SAP on-premise system is the leading system for these sales quotes, sales, and, service contracts. Quotes created in your cloud solution can be replicated to your SAP on-premise system from ▶ *Action* ❯ *Submit.* ❚ Quotes created in SAP ERP can be edited in SAP Cloud for Customer and the changes are replicated in SAP ERP.

- *Inbound* – Quote edits completed in your cloud solution are not replicated to your SAP on-premise system. Those quotes are overwritten if further replications are triggered from your SAP on-premise system.

  > i Note
  >
  > We recommend that you control editable fields and actions from the page layout and only open extension fields that do not require replication. (Creation of the sales quote is only possible in SAP ERP and changes performed in SAP Cloud for Customer are not sent to SAP ERP).

- *Empty* – Leaving this field blank indicates the sales quote stays in SAP Cloud for Customer, but this option still allows you to request external pricing.

> i Note
>
> This configuration only applies to new sales quotes as well as sales and service contracts. Existing sales quotes and sales and service contracts behave using the inherited document type configuration. Existing sales quotes and sales and service contracts behave as specified from the previous active document type configuration.

Asynchronous Pricing – Administrators can modify the settings for external pricing. A synchronous call is required to retrieve the complete pricing result from the SAP on-premise system to your cloud solution.

Replicated sales documents also require a synchronous pricing update once the sales document is updated during a save in SAP Cloud for Customer.

With this configuration, if the document was previously replicated, administrators can disable the synchronous pricing call to the external system. In addition, you can disable the synchronous call completely, which is valid for quotes created in your cloud solution. For both configuration options, the pricing status needs to be calculated successfully through the asynchronous call from the external system. Select the option that suits your business needs.

- *Empty* – Leaving this field blank triggers an automatic (once replicated) synchronous pricing call activation (You see pricing-related errors, but configuration has performance impacts.).
- *After replication* – If document was replicated successfully, an automatic synchronous pricing call is deactivated.
- *Always* – An automatic synchronous pricing call is always deactivated (leads to a performance advantage, but possible pricing call error messages are no longer displayed directly in the UI, only asynchronously). No matter the configuration, you can trigger pricing synchronously by clicking ▶ *Action* ❯ *Request External Pricing.* ❯ With this configuration, avoid quote approvals that include external pricing elements.

> **i Note**
>
> To avoid data inconsistencies between SAP ERP and SAP Cloud for Customer, only replicated contracts are used in tickets.

> **→ Remember**
>
> Only new and sales and service contracts and sales quotes inherit changes in the document type configuration. Existing contracts and sales quotes behave as specified in past active document type configuration.

6.1.3 Define Contract Item Types

Administrators can explore and learn how to define contract item types.

Item types determine how an item category behaves in a contracts. Item item types are not necessary, but are relevant if you replicate quotes with an on premise system and administrators should remember to configure document types.

You can define alternative item types for the item types delivered in the standard solution. These alternative item types are then displayed for the corresponding items under the *Products* tab for contracts. You can use these custom item types to process items based on SAP ERP item categories. You can also use item types for, in order simulations to retrieve external pricing.

Define your own item types to reflect your company practices:

1. To quickly navigate to the fine-tuning activity, go to ▶ *Business Configuration* ❯ *Overview* ❯ *Sort by: Activities* ❯ *Search* ❯ and type *Sales Quotes*.
2. Click ▶ *Contracts* ❯ *Item Types* ❯ *Maintain Item Types* ❯.
3. Click *Add Row*.
4. Enter the desired details and save your entries.

> **i Note**
>
> If you want to define an item as a free sample or free good that should not affect pricing, flag it as *Not Relevant for Pricing*. When an item that is not relevant for pricing is added to a quote, it does contain a price. However, you can still add a price for this product manually.

6.1.4 Configure Sales Area Defaulting for Contracts

As an administrator, you can configure the sales area defaults for service and sales contracts.

Configure Sales Area Defaulting for service contracts by navigating to ‖▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ‖▶ *Edit Project Scope* ❭ *Questions* ❭ *Service* ❭ *Entitlement Management* ❭ *Service Contract Management* ❭ *Business Option: Sales Area Determination for Contracts* ❭.

Configure Sales Area Defaulting for sales contracts by navigating to ‖▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ‖▶ *Edit Project Scope* ❭ *Questions* ❭ *New Business* ❭ *Sales Contracts* ❭ *Business Option: Sales Area Determination for Contracts* ❭.

6.1.5 Configure Item Type Determination Rules

Administrators can configure multiple document and item types for contracts.

To edit involved parties, go to ‖▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ‖▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Service Contracts* ❭ *Item Type Determination Rules* ❭ *Maintain Item Type Determination Rules for Contracts* ❭.

6.1.6 Configure Involved Parties

Administrators can maintain involved parties for different types of items, such as leads or activities. In this step, you can assign party roles and use determination rules for involved parties.

To edit involved parties, go to ‖▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ‖▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Sales Contract* ❭ *Item Types* ❭ *Involved Parties* ❭ *Maintain Involved Parties.* ❭

6.1.7 Configure Customer from Ship-To Party Role Determination

Explore how administrators can activate or deactivate determination steps for your party roles for sales contracts.

1. Go to ▶ *Business Configuration* 〉 *Activity List* 〉 *Service Contracts (or Sales Contracts)* 〉 *Maintain Involved Parties* ◀ .
2. Go to *Party Role Account*.
3. Click *Maintain Determinations*.
4. Flag the determination steps.
5. Save and activate the desired determination.

6.1.8 Configure Contract Determination Dates

Administrators can configure active contract determination based on contract validity criteria for requested dates in related tickets.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* ◀. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Service* 〉 *Customer Care* 〉 *Service Request Management* 〉 *Group: Entitlement Usage for Service Requests* ◀ and select the scoping question: *Do you want to determine activated service contracts, based on the contract validity period at the time of the requested date in the ticket?*

The following use cases are relevant when your business requires date considerations for future and past tickets.

Date Considerations for Future Tickets

Future tickets are ones you create with a future request date. Contracts, which are currently in *Ready* status, can be determined by ticket creation. A typical use case is tickets created in advance by maintenance plan. The determination occurs if the status is *Active* at the requested future date of the service work ticket.

To create a ticket using future dates:

1. In the new work ticket, enter a requested date in the future.
2. Enter the entitled product in ticket.
3. The contract, with the applicable future date is determined.

6.1.9 Configure the Contract Determination Log

Learn how to add the contract determination log.

Go to ▶ *Administrator* 〉 *Service and Social* 〉 *Contract Support* 〉 *Contract Determination Log* ◀.

6.1.10 Configure Number Ranges for Contracts

Administrators need to configure number ranges to define the range of numbers assigned to sales and service contracts.

1. To quickly navigate to the fine-tuning activity, go to ▶ *Business Configuration* ❯ *Overview* ❯ *Activities* ❯ *Search* ◀ and type *Number Ranges*.
2. Click *Maintain Number Range*.
3. On the following screen, review the default begin and end number that applies to sales quotes in the solution.
4. If you wish to define a different number range, choose *Change Current Number*.
5. On the following screen, enter the new current number, then click *Save and Close*.
6. Click *Save and Close* again.

6.1.11 Configure Contract Usage Restrictions

Learn how to set up usage restrictions for contracts to limit coverage based on additional criteria.

If you want to automatically restrict contracts to certain ticket types the first step is to create usage restrictions in the Contracts fine tuning activity.

1. Navigate to ▶ *Business Configuration* ❯ *Implementation Projects.* ◀
2. Select your implementation project and choose *Open Activity List.*
3. Select the *Fine-Tune* tab, and from the *Activity List*, choose *Contracts.*
4. Choose *Maintain Contract Usage Restriction* on the *Contracts* screen.
5. Add usage restriction codes and descriptions. Your codes should start with the letter **z**.
6. Choose *Save and Close* when finished.

6.1.12 Configure Message Severity for Contracts

Upgrade, downgrade, or hide the severity level of errors and warnings for contracts.

You can configure message severity using the sales or service contract fine-tuning activity in the following location: ▶ *Business Configuration* ❯ *Implementation Projects* ❯ *First Implementation Project* ❯ *Open Activity List* ❯ *Fine-Tune* ❯ *Sales Contracts (or Service Contracts)* ❯ *Message Severity Configuration.* ◀

6.1.13 Configure Covered Objects on Item Level

Administrators can maintain covered objects for items in a contract.

When a covered object is maintained at item level, this contract item is only determined if this covered object was set as reference object (in a ticket).

If there is no entry for a covered object on item level, this contract item can also be determined. The determination is then derived from either the covered objects of the next higher item level or by the covered objects stored on header level.

To configure this feature, go to ▮▶ *Business Configuration* ❯ *Implementation Projects* ▮. Select your project and navigate to ▮▶ *Edit Project Scope* ❯ *Questions* ❯ *Service Entitlement* ❯ *Service Contract Management* ❯ *Group: Covered Objects on Item Level* ▮ and select the scoping question: *Do you want to work with covered objects on an item level?*

6.1.14 Configure Release Authorized Parties

Administrators can configure the release authorized party for sales and or service contracts.

Go to ▮▶ *Business Configuration* ❯ *Activity List* ❯ *Service (or Sales)* ❯ *Contracts* ❯ *Involved Parties* ▮ and click the *Active* flag to activate *Authorized Party*. Next, in the *Involved Parties* tab, add the customer which is the authorized party.

6.1.15 Configure Object-Centric Contract Determination

Administrators can learn how to configure contract determination in tickets by scoping the system to determine the search strategy.

Go to ▮▶ *Business Configuration* ❯ *Implementation Projects* ▮. Select your project and navigate to ▮▶ *Edit Project Scope* ❯ *Questions* ❯ *Service* ❯ *Customer Care Service Request Management Group: Entitlement Usage for Service Requests* ▮ and select the scoping question: *Do you want to determine contracts in tickets (disregarding customer account) based only on Registered Products or Installation Points as reference?*

6.1.16 Define Custom Attachment Types for Contracts

Administrators can define additional documents types for attachments in contracts.

1. Go to ▮▶ *Business Configuration* ❯ *Activity List* ❯ *Customer-defined documents types for attachments* ▮.
2. Place a check mark in the *Usage* section for contract header.
3. Click *Add Row*.
4. Enter an additional document type.
5. Save your entries.

Open a contract and navigate to *Attachments*, click *Add* to view the list of attachment types.

6.1.17 Configure Contract Restrictions Based on Ticket Type

Administrator can configure contract types and usage restrictions based on additional criteria such as ticket type.

You can create different contract document types with restricted coverage based on the context they are used in. You can associate specific contract types with specific ticket types to auto assign the appropriate contract for a ticket type.

Set up ticket document types to support contract restrictions as follows:

1. Go to ▐▶ *Business Configuration* ❯ *Implementation Projects* ▐ .
2. Select your implementation project and choose *Open Activity List*.
3. Go to ▐▶ *Fine Tune* ❯ *Activity List* ❯ *Tickets for Customer Support* ❯ *Tickets for Customer Support* ❯ *Maintain Document Types* ▐ .
4. Add document types and descriptions. A new document type should start with the letter **Z**.
5. Select a *Contract Usage Restriction* for each document type as required.
6. Choose *Save* and *Close* when finished.

Users can specify usage restrictions for each contract item. When a user creates a work ticket, the system automatically applies the specified usage restrictions based on the ticket type.

6.1.18 Configure Contract Creation in Full Create Mode

Administrators can configure settings to create contract in full create mode. This allows you to skip a few additional UI steps required when creating in the quick create mode.

1. Navigate to ▐▶ *Administrator* ❯ *Service and Social* ❯ *Contract Configuration* ▐ .
2. Toggle the switch *Create Contracts in detail view* to *Yes*.
3. Sign out and sign in again to activate the change.

> **!** Restriction
>
> There is a limitation in this release. If you create contract in offline mode, you need to ensure that this configuration is deactivated.

6.1.19 Define Item Processing Codes for Tickets

Learn how to set-up item processing codes used for quantity contracts.

Context

Item processing codes are essential when working with quantity contracts. They determine how items (and their related products) are handled in the following business process. Specifically if there is an increase,

decreases, or no impact in ticket items. Follow the steps below to set-up item processing codes for your business.

Procedure

1. 1. Go to ▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Show All Activities* ❭ *Tickets for Customer Support* ❭ *Maintain Item Processing Codes* ❭.
2. Select *Add Row*.
3. To create item processing codes, populate the required fields.
4. Save your entries.

6.1.20 Configure Contract Payment Terms

You configure payment terms in the solution, based on company business needs. Payment terms define when an invoice must be paid, and whether a discount is applicable, depending if payments were made within the agreed upon time period.

Configure payment terms for contracts under ▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Accounts* ❭ *Payment Terms* ❭ *Maintain Payment Terms.* ❭

When working from the:

- *Contracts Header*, view the *Payment Terms*. Click the dropdown to select the correct payment term.
- *Contracts Items* tab, view the payment section in *General Data.* Click the dropdown to select the correct payment term.

6.1.21 Configure Offline Contract Item Determination

General availability has been made for administrators to configure contract item determination to use in offline mode. Go to ▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▶ *Edit Project Scope* ❭ *Questions* ❭ *Service* ❭ *Customer Care* ❭ *Service Request Management* ❭ ❭ and select the scoping question: *Do you want to determine contract items for tickets in offline mode?*

6.1.22 Modify Contract Types Using the Data Workbench

Administrators can use the *Data Workbench* to modify sales and service contract types even after they are created.

1. Navigate to the *Data Workbench.*
2. Export contracts.
3. Modify the contract type.
4. Update contracts in the *Data Workbench.*

6.1.23 Configure Excel Export Restriction for Contracts

Administrators can configure a restriction so that business role users cannot perform Excel exports for service and sales contracts.

Configure Excel export authorization restrictions by navigating to ▐▶ *Administrator* ❯ *Business Roles* ❯ *Select role (that includes the Contracts work center)* ❯ *Fields & Actions* ❯ *Business Actions Restrictions* ❯ *Add row* ❯ and search for Microsoft Excel.

6.1.24 Remove Personal Data in Contracts

The depersonalization function allows users to remove personal data from a business object, such as contracts, to ensure compliance with the applicable data protection requirements.

Depersonalization is only available for users with access to the *Data Protection and Privacy* work center.

The *Data Privacy Management* tab allows those responsible for data protection issues in an organization to respond to personal information removal and disclosure.

Remove personal data in contracts by navigating to ▐▶ *Contracts* ❯ *All Contracts (or select desired contracts* ❯ *Actions* ❯ *Depersonalize.* ❯

6.1.25 Configure Blocking Reasons for Sales Contracts

Administrators can configure blocking reasons for *Sales Contracts*.

Go to ▐▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▐▶ *Open Activity List* ❯ *Accounts* ❯ *Sales Document Order Block Assignment* ❯ to configure the blocking reasons.

6.2   Create Contracts

Users can create a contract and add details such as name, service level, dates, and involved parties. Additional details such as covered objects, items, pricing, are added in their respective sections in the contract.

You can create the contract, request pricing, and send it to the customer for review before activating it upon receipt of the customer's signature. Further details such as covered objects, items, pricing, are added in their respective sections in the contract.

As long as contracts are in negotiations, such as an internal or external review process with customers, the contract status will remain with status *In Preparation*, meaning the contract is created but not ready to be used in service tickets.

You also have the option to select from existing contract templates which were are usually created by your contract administrator or manager. As an end-user, the contract template will help you save time by pre-populating fields especially for standard customer contract requests.

Some companies only have a fixed (standard) number of contracts with a defined portfolio of services in their market offering. Therefore, customized contracts won't be created and the contract representative will select one of the company's standard contracts.

6.2.1 Create a Contract

Learn how to create a contract.

1. Navigate to ▶ *Contracts* ❯ *New* ❯.
2. Add contract details.
3. Navigate to *Covered Objects* of the contract to search for the customer's product, preferably using the search function to look for the product's unique *Serial ID*.

> **i Note**
>
> If you enter a serial ID, the corresponding product is added automatically. You can also use the *value help* to search for the serial ID or you can register it. To register a product select *New Registration* from the *value help*.

4. Select *Add* and the customer's desired product (covered object) are appended to the contract.

> **i Note**
>
> Depending on how the product item was created in the solution, details such as the *serial ID*, *registered products*, *product category*, will be automatically populated in the contract fields.
>
> When adding product items to a covered object, select the ▶ *Product Value Selection* ▶ *Show Advanced Filter* ▶ from the *Products* tab. This allows you to quickly filter filters such as *Product Category ID* and *Product Category Description*.

5. Navigate to the *Items* tab to assign for example, an entitlement product 'Extended warranty' for the previously added covered object.

> **i Note**
>
> In this case, a product 'Extended Warranty´ has been added as a contract item. The desired warranty for example, 'Warranty 50%' is automatically added.

6. Assign an entitled services & parts product, for example 'Repair Hours'.

> **i Note**
>
> This agreement gives the customer the right in case of an incident (within contract validity) to raise a claim of a 50% discount for all of the repair hours required to fix the product issue.

7. Save your entries.

6.2.1.1 Define Contract Item Types

Administrators can explore and learn how to define contract item types.

Item types determine how an item category behaves in a contracts. Item item types are not necessary, but are relevant if you replicate quotes with an on premise system and administrators should remember to configure document types.

You can define alternative item types for the item types delivered in the standard solution. These alternative item types are then displayed for the corresponding items under the *Products* tab for contracts. You can use these custom item types to process items based on SAP ERP item categories. You can also use item types for, in order simulations to retrieve external pricing.

Define your own item types to reflect your company practices:

1. To quickly navigate to the fine-tuning activity, go to ▶ *Business Configuration* ▶ *Overview* ▶ *Sort by: Activities* ▶ *Search* ▶ and type *Sales Quotes*.
2. Click ▶ *Contracts* ▶ *Item Types* ▶ *Maintain Item Types* ▶.

3. Click *Add Row*.
4. Enter the desired details and save your entries.

> **i** Note
>
> If you want to define an item as a free sample or free good that should not affect pricing, flag it as *Not Relevant for Pricing*. When an item that is not relevant for pricing is added to a quote, it does contain a price. However, you can still add a price for this product manually.

6.2.1.2   Configure Sales Area Defaulting for Contracts

As an administrator, you can configure the sales area defaults for service and sales contracts.

Configure Sales Area Defaulting for service contracts by navigating to ▌▶ *Business Configuration* ▶ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Edit Project Scope* ▶ *Questions* ▶ *Service* ▶ *Entitlement Management* ▶ *Service Contract Management* ▶ *Business Option: Sales Area Determination for Contracts* ▌.

Configure Sales Area Defaulting for sales contracts by navigating to ▌▶ *Business Configuration* ▶ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Edit Project Scope* ▶ *Questions* ▶ *New Business* ▶ *Sales Contracts* ▶ *Business Option: Sales Area Determination for Contracts* ▌.

6.2.1.3   Configure Number Ranges for Contracts

Administrators need to configure number ranges to define the range of numbers assigned to sales and service contracts.

1. To quickly navigate to the fine-tuning activity, go to ▌▶ *Business Configuration* ▶ *Overview* ▶ *Activities* ▶ *Search* ▌ and type *Number Ranges*.
2. Click *Maintain Number Range*.
3. On the following screen, review the default begin and end number that applies to sales quotes in the solution.
4. If you wish to define a different number range, choose *Change Current Number*.
5. On the following screen, enter the new current number, then click *Save and Close*.
6. Click *Save and Close* again.

6.2.1.4   Configure Message Severity for Contracts

Upgrade, downgrade, or hide the severity level of errors and warnings for contracts.

You can configure message severity using the sales or service contract fine-tuning activity in the following location: ▌▶ *Business Configuration* ▶ *Implementation Projects* ▶ *First Implementation Project* ▶ *Open Activity List* ▶ *Fine-Tune* ▶ *Sales Contracts (or Service Contracts)* ▶ *Message Severity Configuration.* ▌

6.2.1.5   Configure Contract Creation in Full Create Mode

Administrators can configure settings to create contract in full create mode. This allows you to skip a few additional UI steps required when creating in the quick create mode.

1. Navigate to ▎▶ *Administrator* ❯ *Service and Social* ❯ *Contract Configuration* ▎.
2. Toggle the switch *Create Contracts in detail view* to *Yes*.
3. Sign out and sign in again to activate the change.

> ! Restriction
>
> There is a limitation in this release. If you create contract in offline mode, you need to ensure that this configuration is deactivated.

6.2.1.6   Create Contract in Full Create Mode

Administrators can configure settings to create contracts in full create mode.

This feature allows you to skip additional steps that are required to create a contract in quick create mode.

Use full create to start a new contract in the contract list or in the *Contract* tab of customer master data.

6.2.1.6.1   Configure Full Create Mode

To enable the full create option for contract creation, follow these steps:

1. Navigate to ▎▶ *Administrator* ❯ *Service and Social* ❯ *Contract Configuration* ▎.
2. Toggle the switch *Create Contracts in detail view* to *Yes*.
3. Sign out and sign in again to activate the change.

6.2.2 Create a Contract from a Template

Create contracts using templates, which automatically populate data in selected fields.

Context

Contract Templates can be used to accelerate and standardize contract creation.

Procedure

1. Create a new contract in the *Contracts* work center.
2. Click *Contract Template.*
3. Select the desired sales contract template.
4. Accept the template default contract data.
5. Click *Save and Open.*
6. Assign remaining entries such as the *Customer* details.

6.2.3 Create Contracts from Accounts and Individual Customers

Users can create a contract from accounts or individual customers.

1. Open an existing account or individual customer.
2. Go to the *Contracts* tab.
3. Click *New*.
4. Click *New Contract*.
5. The account you opened in the previous step is defaulted in the new contract.

   > i Note
   >
   > The contract type (sales or service) is defaulted and equal to the type applied by the user in the last contract setup.

   > i Note
   >
   > You can also default the sales area.

6.2.4 Create a Contract from an Opportunity

You can create contracts directly from the opportunity and some relevant details are copied to the contract. If desired, you can bypass creating an opportunity and create a contract (proposal) directly.

Context

In some cases, a customer might during their decision and proposal process inquire about a service contract before purchasing it which is why an opportunity is created for a contract.

For the companies providing contracts, opportunities are an indispensable prerequisite for calculating the company revenue forecast.

Procedure

1. Navigate to ▎▶ *Opportunities* ❯ *New* ▎.
2. Enter the required details such as the opportunity name, account, and owner.
3. Enter additional opportunity details such as the sales team, required service, and expected value.
4. Navigate to the *Contracts* tab of the opportunity and click *New*.
5. Save your entries.

6.2.5 Create a Related Contract

Create a related contract by copy everything into a new contract except the contract ID, external reference, signed on, begins on, ends on and internal comment.

Context

Related Contracts are associated and processed, for example, in contract renewal process.

Procedure

1. Go to *Contracts* and open the contract from which you want to create the related contract.
2. Go to *Related Contracts* tab and choose *New*.
3. Enter the entries, such as *Signed On*, *Begins On*, and *Ends On*.

4. Save the entries.

6.2.6 Block Creation of Contracts

You can maintain blocking reasons to block creation of *Sales Contracts* for specific accounts.

To use this feature, administrators must select the fine-tuning activity ▶ *Accounts* ❯ *Sales Document Order Block Assignment* ❯ and assign blocking reasons to the contract document type.
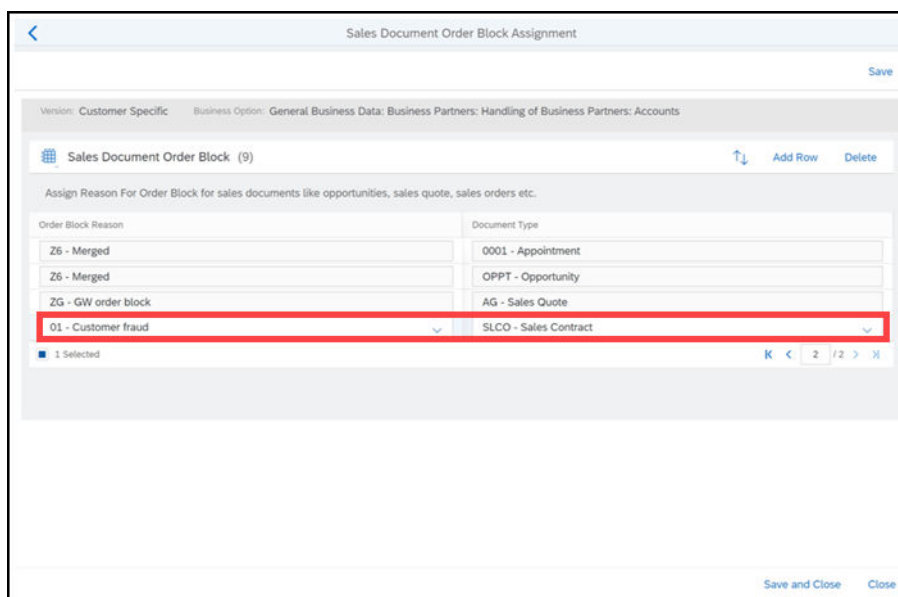
6.2.6.1   Configure Blocking Reasons for Sales Contracts

Administrators can configure blocking reasons for *Sales Contracts*.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Open Activity List* ❯ *Accounts* ❯ *Sales Document Order Block Assignment* ❯ to configure the blocking reasons.

6.2.7 Assign Territories to Contracts

Users can assign one territory to a contract, as well as search for and display territory changes in contracts.

To assign a single territory to a contract (noting that only one territory per contract is allowed),

1. Create a new contract.
2. Enter the contract details.
3. Click the field help in the *Territory* field.

4. Use the value selector to filter territory displays, such as:
   - *All Territories*
   - *Related Territories*
   - *My Territories*
   - *My Related Territories*
5. Select a territory to assign to your contract and save your entries.
6. Territories assigned to contracts appear in the contract *Overview*, *Quick view*, as well as the contract list.

> **i Note**
>
> Territory modifications made to contracts appear in the *Contract Changes* tab.

6.2.7.1 Create Realignment Runs for Contracts

As an administrator, learn how to define a territory realignment run for contracts.

Follow the procedures to define a realignment run for contracts and territories.

To define a realignment run for contracts and territories, proceed as follows:

1. Choose ▶ *Sales* ❯ *New* ❯ *Realignment Runs.* ❯.
   A wizard appears to help you create a realignment run.
2. In the first step, define rules for calculating territory owners. These rules determine how accounts are assigned to territories.
3. Choose *Next*.
4. In this step, you can add accounts that you want to maintain manually as exceptions to the rules you defined.
5. Choose *Next*.
6. In this step of the wizard, enter a title for the realignment run.
7. Choose *Create*.
   In the last step of the wizard, the system displays the ID of your realignment run and provides information about where to find it.
8. To display the realignment run, choose the title of the realignment run, which appears as a link.
   On the overview screen that appears, you can see the status, details, and results of the realignment. You can also access your realignment run as described in the task *Realigning Contracts and Territories*.
9. Make the changes you defined in this realignment run by realigning contracts and territories.

6.2.7.2 Access Restrictions for Contracts with Territories

Learn how to maintain access context for the *Contracts* work center.

1. Open the business role by clicking the work center ▶ *Administrator* ❯ *General Settings* ❯ *Business Roles* ❯ and select the hyperlink of the business roles you want to assign an access context to.
2. Click the *Access Restrictions* tab.
3. Select the *CONTRACT_WCVIEW* assign territory access context to it.

4. In the *Read Access* field, select *Unrestricted* or *Restricted*.

> **i** Note
>
> Choosing *Unrestricted* means that the user has access to all business data related to the tab. Choosing *Restricted* means that the user only has access to specific business data, depending on the access context.

5. Choose *Restricted* to restrict the read access further.

> **i** Note
>
> Not every work center tab has access context that can be modified.

From the *Restriction Rule* dropdown, select the desired rule for the contract work center tab:
   ○ *Territories (Employees for Managers)*
   ○ *Territories, Employees*
   ○ *Territories*
   ○ *Employee Accounts (Account and Territory Team)*

6. In the *Write Access* field, select *Unrestricted*, *Restricted*, or *No Access*.

> **i** Note
>
> Choose only *No Access* if the *Write Access* has been set to **Restricted** and this selection means that the user has no write access to the work center tab.

7. If you choose to restrict the *Write Access*, from the *Restriction Rule* dropdown, select the desired rule you wish to restrict.

6.3 Maintain Contracts

Once users have created contracts, they can modify contract details such as updating or adding the involved parties, covered objects, billing plan, customer call notes, as well as assigning territories assignment. When working with contracts, users benefit from the basic and advanced search to easily query contracts.

6.3.1 Maintain Involved Parties for Contracts

Users can maintain involved parties on header level and item level.

1. From the *Products* tab, use personalize or adapt to add *Item Involved Parties*.
2. Administrators must go to fine-tuning activity ▶ *Sales Quotes* ❯ *Involved Item Parties* ❯.
3. Party roles on item level are copied from header parties. If you do not need party roles for reporting or
   follow-up processes, we recommend deactivating them in the item party schema.

> **i Note**
>
> Ship-to parties are maintained in the sales quote product table. Please keep the activation in the item
> schema in case a copy and follow-up action should also copy the item party.

6.3.1.1 Define Custom Attachment Types for Contracts

Administrators can define additional documents types for attachments in contracts.

1. Go to ▶ *Business Configuration* ❯ *Activity List* ❯ *Customer-defined documents types for attachments* ❯.
2. Place a check mark in the *Usage* section for contract header.
3. Click *Add Row*.
4. Enter an additional document type.
5. Save your entries.

Open a contract and navigate to *Attachments*, click *Add* to view the list of attachment types.

6.3.1.2 Use Release Authorized Parties in Contract Determination

Learn how to use release authorized parties in contract determination.

Create a contract for an account. In the contract header, set the flag *Include Authorized Parties*. Next you can add the party role *Authorized Party*.

> **i Note**
>
> If required, from a contract, add the *Involved Parties* tab.

6.3.1.3 Use Account Hierarchy for Contracts

When working with contracts in accounts, users can set up details that consider *account* hierarchies for contracts.

1. Create a parent *account* with a child hierarchy.
2. From the parent *account*, navigate to *Contracts* and click *New* to create a contract.
3. In the contract, place a check mark in the *Include Account Hierarchy field*.
4. Navigate to the *Contracts* tab of the child *account* .
5. Click *Advanced Search* (*Involved Party* is the *Child account*) and place a check mark in the *Include Parent Accounts* field.
6. Search for and locate additional contracts from parent accounts.

6.3.1.4 Use Customer from Ship-To Party Role Determination

Learn how configure and use the determine customer for ship-to party roles in account relationships for contracts.

> **→ Remember**
>
> Administrators need first maintain involved parties. Go to ▐▶ *Business Configuration* ❭ *Activity List* ❭ *Service (and or Sales)* ❭ *Maintain Involved Parties* ❭. Go to party role account and click *Maintain Determinations* and flag the determination steps for the account.

Follow the steps to determine customer for ship-to party roles in account relationships for contracts.

1. Open an existing account.
2. Click the account *Relationships* tab.
3. Add the relationship *Has ship-to party* and the related business partner.
4. Go to *Quick Create* for contracts.
5. Click contract *Quick Create* or create a new contract.

6. Select the contract type such as service or sales.
7. Enter the ship-to party and the customer is automatically displayed and defaulted.

6.3.1.5 Use Involved Parties for Service Contracts with Territories

Administrators can learn which party roles can be activated or deactivated for contracts with territories.

Territories can be considered for party determination for the following roles:

- *Contract Administrator*: *Responsibility Contract Administrator of Account Team*
- *Employee Responsible/Owner*: *Employee Responsible of Account Team*
- *Sales Employee*: *Sales Employee of Account Team*

> **i Note**
>
> We recommend deactivating determination steps not needed for your business.

1. Navigate to the *Fine-Tune* party role *Service Contracts* ❯ *Maintain Involved Party* ❯ *Party Role Assignment.* ❯
2. Click *Add Row*.

   > **i Note**
   >
   > Only custom party roles can be added to a party schema.

3. Click *Delete* if you no longer require specific party roles.

   > **i Note**
   >
   > You can only remove custom party roles from your party schema. Removal of the *Activate* flag can be used as an alternative.

   > **i Note**
   >
   > Only active party roles appear in the *Involved Parties* value help.

4. Click ❯ *Maintain Determinations* ❯ *Activate* ❯ or *Deactivate* the desired party roles.

6.3.2 Maintain Contract Items

You can explore the types of items used in contracts, how to structure and renumber contract items, as well as add contract items from templates.

6.3.2.1   Use Covered Objects on Item Level

As contract administrator, you maintain covered objects for items in a contract.

When covered objects are maintained at item level, the contract item will only be determined if this covered object was set as reference object (in a ticket).

If there is no entry for a covered object on item level, this contract item can also be determined. The determination is then derived from either the covered objects of the next higher item level or by the covered objects stored on header level.

If you don't maintain covered objects on header and on item-level, then all objects are covered.

Example

- Contract **Gold**
    - **Covered objects** tab (Header Level): [Covered Objects] **A**, **B**, and **C**
    - **Items** tab
    Line 10 **Extended Warranty** - *Covered Object* tab: >no entry< [= ´A´, ´B´ and ´C´ are covered]
    - Item 20 **Extended Support** *Covered Objects* tab: >´A´<
    [= [only] product ´A´ is covered]
        - Item 20-10 (subset) *Covered Object* tab: ´no entry´
        [= [only] ´A´ is covered

In SAP ERP there are covered objects (internally known as technical objects) only on item level. To be compatible, we recommended a design the cloud contract as follows:

- Contract **Gold** (SAP ERP compatible)
    - *Covered Objects* tab (Header Level): >no entry<
    - **Items** tab
        - Item 10 ´Extended Warranty´ - *Covered Objects* tab: A, B, and C
        - Item 20 ´Extended Support´ *Covered Objects* tab: A
            - Item 20-10 (subset) *Covered Object* tab: A

In SAP ERP, the logic is: no technical object assigned on contract item level implicates the contract item is valid for all technical objects.

You can maintain a covered object for an item in a contract and also remove one or more covered object for an item in a contract. Highlight the items you wish to remove, and then select ▶ *More* ▶ *Remove* ▶.

You can search for contracts using the *Contracts* list table. This query searches for covered objects at the header or item level. Other functions include:

- Copy: When users copy a contract, the covered objects maintained at item level are also copied.
- Change: Any modifications to covered objects on item level (including creation, modifications, and or removal) are displayed in the contract *Changes* tab.

6.3.2.2   Add Contract Items from a Template

6.3.3 Maintain Contract Covered Objects

6.3.3.1   Use Covered Objects on Item Level

As contract administrator, you maintain covered objects for items in a contract.

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  - **Items** tab
    - Item 10 ´Extended Warranty´ - *Covered Objects* tab: A, B, and C
    - Item 20 ´Extended Support´ *Covered Objects* tab: A
      - Item 20-10 (subset) *Covered Object* tab: A

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- Copy: When users copy a contract, the covered objects maintained at item level are also copied.
- Change: Any modifications to covered objects on item level (including creation, modifications, and or removal) are displayed in the contract *Changes* tab.

6.3.4 Modify Contract Types Using the Data Workbench

Administrators can use the *Data Workbench* to modify sales and service contract types even after they are created.

1. Navigate to the *Data Workbench.*
2. Export contracts.
3. Modify the contract type.
4. Update contracts in the *Data Workbench.*

6.3.5 Copy and Paste Product Mass Entries in Service Contracts

Users can can copy items from Excel using the copy and paste function in the product table.

This task allows you to quickly paste *Items*, *Covered Objects*, *Entitled/ Excluded Services & Parts*. Ensure that the copied data exactly matches the order of columns in the user interface.

1. Open a contract.
2. Go to the *Items* tab of a contract.
3. Click the *Paste* icon and the paste field appears.
4. Click in the *Paste supported source data, such as Excel* field.
5. Use your keyboard paste function, such as Ctrl + V (or Shift + Insert) to paste the data in the field.

6.3.6 Service Contract Summary

6.3.7 Manage Access Restriction for Contracts

You can assign access rules to users for Contracts.

For users with assigned Business Roles, you can set Read and/or Write Access Rules for Contracts via Access Restrictions.

Restriction Rule	Rule Description
01 Employee	Access only if employee forms part of at least one of the Involved Parties used in the contract.
02 Sales data of Employee	Access only if Employee Sales Data (Sales Organization, Division, Distribution Channel) is equal to the Sales Data used in Contract.
03 Employee, Sales Data of Employee	Access only if the employee forms part of at least one of the Involved Parties of the contract or the Employee Sales Data (Sales Organization, Division, Distribution Channel) is equal to the Sales Data used in the Contract.
04 Sales Organization of Employee	Access only if the Sales Organization is equal to the Sales Organization used in the Contract.
05 Employees for Managers	Managers have access to all the contracts of the employees they are responsible for.
06 Employee, Accounts (Account Team)	Access if the employee is directly assigned as involved party in the contract and/or if employee is assigned to the Account Team of the Contract Account.

6.3.8 Use Contract Queries

You can use the predefined contract queries to display relevant contracts or download contracts for offline.

The predefined contract queries are:

- *Contracts Expiring Soon*
  The query lists the contracts which will be expired within next 28 days.
- *Contracts for My Territories*
  The query lists the contracts with same territory as you are assigned to.
- *My Contracts*
  The query lists the contracts where you are assigned as the Involved Party of Contract Administrator and/or Employee Responsible.
- *My Customers' Contracts*
  The query lists the contracts of the specific customers whose account teams you are assigned to, regardless of the role you are assigned in the account teams.
- *My Team's Contracts*
  The query lists the contracts where you or any of your team members are assigned as Involved Party of Contract Administrator and/or Employee Responsible.

6.3.9 Manage Territory in Contracts

Territory of Contracts is aligned with Territory of Accounts.

Contracts are included as part of the realignment runs while single territory per account is configured. When the territory of an account is updated, the territory of the associated contracts is also updated. The update interval for open contracts is 8 minutes and for closed contracts is 30 minutes.

6.3.10 Use Incoterms in Contracts

Incoterms inform sales contracts the respective obligations, costs, and risks involved in the delivery of goods from the seller to the buyer.

6.3.11 Maintain Notes

Track notes in the History Mode.

You can get clear insights on customer negotiations and change requests.
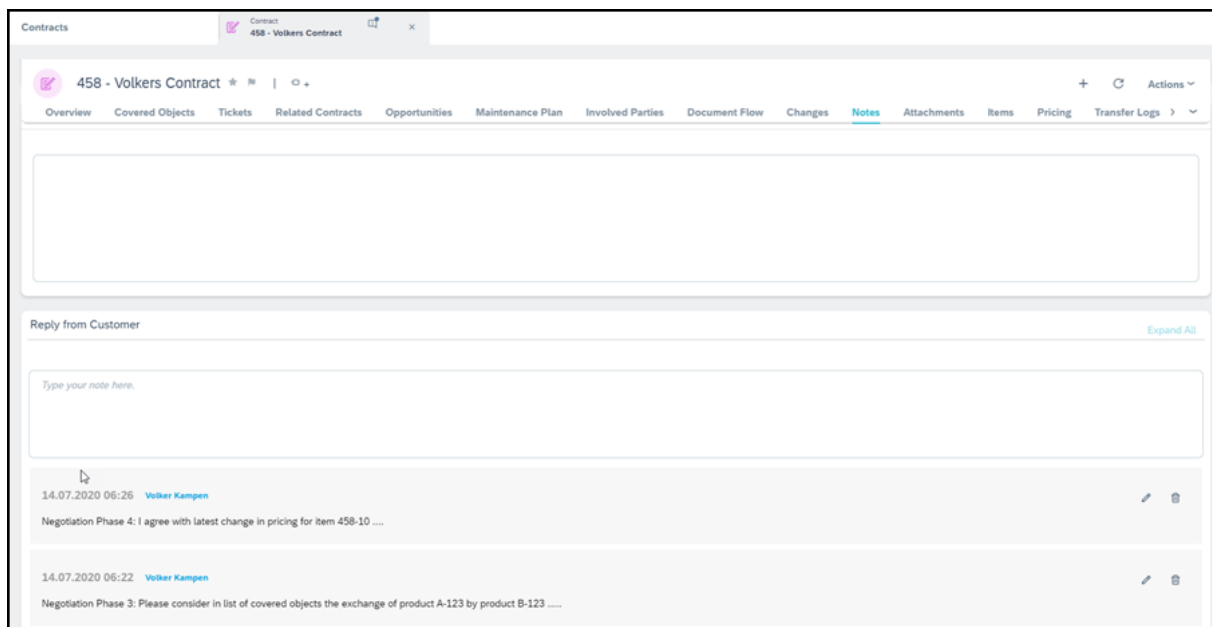
> **i** Note
>
> Notes in history mode aren't replicated to or from SAP ERP or SAP S/4HANA.

Procedure

Enable this feature under ▌▶ *Contract* ▶ *Adaptation mode* ▶ *Add hidden Note Reply from Customer* ▌.

6.4   Service Contracts and Tickets

Learn about covered objects, the reference object in the ticket and how agents can navigate from the ticket contract hyperlink directly to the contract, search for contracts, embed tickets in contracts, and determine relevance of covered objects in ticket header.

6.4.1 Display a Ticket from a Service Contract

Users can display tickets directly from a service contract by navigating to Contract and searching for or selecting a contract. From the contract, navigate to the Ticket tab.

6.4.1.1   Search for Tickets Related to Service Contracts

You can search for tickets associated with contract (on header and item level).

User can create or select queries for:

- *Header* - Contract was assigned on ticket header level.
- *All* - Contract was assigned on ticket header and or ticket item level (all tickets, to which this contract has been determined).
- *Items* - Only ticket item to contract item assignments.

> **i Note**
>
> Based on the selected query, there are different field compositions for advanced search and result columns.

6.4.1.2 Check Service Tickets Related to a Contract

The covered object is equal to the reference object in the ticket – for that reason the agent can easily navigate from the ticket contract hyperlink directly to the contract to inform customers about their entitlements.

Context

A customer has an issue with a product and contacts the service representative providing them their contract id or contract name. To react quickly to the customer's request, the representative wants to view only the tickets only for a particular customer contract.

Procedure

1. Search for the contract and open it.
2. Navigate to *Tickets*.
3. Select the correct *Ticket ID*.
4. From the ticket overview, select ▶ *Summary* ▶ *Preview* ▶ to review billing details.
5. If desired, add notes to the ticket.
6. Save your entries.

   For quantity contracts, you can select the quantity contract item and search in its *Release History* for related tickets to see remaining quantity.

   You can also navigate to the *Ticket* tab of the contract to see all tickets related to the contract.

6.4.1.3 Embed Tickets Table in Service Contracts

Administrators can embed the tickets table tab in a contract overview section.

To have a highly flexible query for contract related tickets, we recommend embedding tickets section in contracts.

1. As an administrator, navigate to *Tickets* tab of a contract.
2. Go to ▶ *Adapt* ▶ *Edit Master Layout* ▶.

3. Click *Copy*.
4. Go to the contract *Overview* section.
5. Select a section in the *Overview* section to embed the *Tickets* table.
6. Click *Paste*.
7. Click *Apply*.
8. Click ▶ *Adapt* ❯ *End Layout* ◀.

You can now view the embedded *Tickets* table including all of its queries.

6.4.2 Service Contract Determination in Tickets

Contract are determined and automatically added to a work ticket during ticket creation. This also applies to a SLA (service level agreement), which might form as part of a contract that you would be able to view after ticket determination in the ticket header.

The following are some features of contract determination ina ticket:

- Contract determination in a ticket occurs based on ticket header information and item data.
- There is no direst dependency between the contract determination given by ticket header and the contracts determined by the ticket items.
- It is possible to maintain multiple contracts in item level.
- Contract hierarchy is supported.
- Setting different contract determination logic and parameters is possible via BaDI implementation.

6.4.3 Service Determination Relevance of Item Covered Objects in Ticket Header

Administrators can configure *Determination Relevance of Covered Objects.*

With the configuration, users can create a new contract and choose one of the following *Determination Relevance of Covered Objects* types:

- *Limited to Item Covered Objects* - This selection is the system default. If a user enters in the ticket processing a *Serial ID* as a *Ticket Reference Object*, the contract determination on ticket header is only considered for contracts where this *Serial ID* is listed as a covered object on contract item.
- *Consider Header Covered Objects* - If a user chooses this selection (or leaves the field blank), and enters ticket processing such as a *Serial ID* as a *Ticket Reference Object*, the contract determination on ticket header is only considered for contracts where this *Serial ID* is listed as a covered object on contract header

To configure *Determination Relevance of Covered Objects*, navigate to ▶ *Business Configuration* ❯ *Implementation Projects* ❯ *Open Activity List* ❯ *Service Contracts* ❯ *Document Types* ❯ *Maintain Document Types* ◀ and add an select an entry from *Determination Relevance*.

6.4.4 Compare Service Determination Relevance of Item Covered Objects in Ticket Header

Users can compare values entered as ticket references (such as *Products*, *iBase*, and *Serial ID*) to covered objects assigned to contract items to determine an applicable contract.

When working with tickets that have a contract, the solution considers covered object assigned to contract items. It also considers covered objects assigned to the contract header referencing covered objects that fit.

6.4.5 Choose Item Processing Codes for Quantity Service Contracts

Learn about item processing codes and how the target, release, and remaining quantities are calculated as well as the affect on your service tickets (items).

With quantity contracts, you can administer contract determination for defined products which should be restricted in a period to a specific target quantity.

Businesses typically use quantity contracts when they need to:

- Enable a flexible contract design based on individual customer business needs.
- Keep their contract cost risk within an acceptable limit.
- Offer an easy and intuitive contract set up without operating errors.
- Stay informed about contract usage details.

In general, code types are used in tickets (items) to determine how items (and their related products) are handled in the business process. Therefore, if you have contracts in the system, the code types you choose when setting up item processing codes have a considerable influence on the way your business works with quantity contracts. Mainly, the choices made will result in how the target, release, and remaining quantities are calculated, so consider these factors when setting up your solution.

Whether the item processing code increases, decreases, or has no impact in ticket items, you'll find various service transaction processing type codes depending on your solution set-up. Depending on the item processing code, different handling for quantity call off (release) in contract items are relevant.

6.4.5.1 Decrease Remaining Quantity in Quantity Service Contracts

Learn about the item processing codes that have a (decrease) impact in quantity contracts.

The following item processing codes defined in fine-tuning have a (decrease) impact on defined product quantities in quantity contracts if they are used in tickets:

- 0001 SERVICE = Time
- 0002 PART_CONSUM_FROM_TECHN_STOCK = Part Consumption from Technician Stock
- 0004 PART_ADV_SHIP_TO_CONSI_STOCK = Part Advance Shipment to Customer Consignment Stock

- 0007 PRODUCT_WITHOUT_COST = Billing Request
- 0009 CUST_ITEM_CONFIRMATION = Item Confirmation

Example

A ticket is created and the technician provides a service, for example, using a spare part or time in accordance with the contract covered objects. Once the service occurs and is recorded in the solution, you will see a modification in the target definitions resulting in an increase in the release quantity and a reduction in the remaining quantity.

6.4.5.2   Increase Remaining Quantity in Quantity Service Contracts

Learn about the item processing code that has an (increase) impact in quantity contracts.

The following item processing code defined in fine-tuning has an (increase) impact on defined product quantities in quantity contracts if they are used in tickets:

- 0005 PART_RET_PICK_FROM_CONSI_STOCK = Part Return from Customer Consignment Stock

Example

The service technician provided a service in accordance with the contract covered objects. The stock for example, a boiler was returned. Once the service occurs and is recorded in the solution including the boiler return, you will see a modification in the target definitions resulting in a decrease in the release quantity and an increase in the remaining quantity.

6.4.5.3   Impact of Remaining Quantity in Quantity Service Contracts

Learn about the item processing code that have no impact in quantity contracts.

The following item processing codes defined in fine-tuning have no impact on defined product quantities in quantity contracts if they are used in tickets.

- 0003 PART_CONSUM_FROM_CONSI_STOCK = Part Consumption from Customer Consignment Stock
- 0006 COMPLAINT_REQUEST_PRODUCT = Complaint Request
- 0008 CUST_ITEM_PLANNING = Item Planning
- 0010 EXTERNAL_PROCUREMENT = External Procurement

Example

In the first example, the technician provided a service in accordance with the contract covered objects. The stock, for example, one boiler was already sent as ´Part Advance Shipment to Customer Consignment Stock part´ to the customer. This has had an impact on the product quantity of the quantity contract.

For this reason a ticket item with type ´Part Consumption from Customer Consignment Stock´ won´t have any further impact on the product quantity of the quantity contract resulting in the release quantity and remaining quantity staying the same.

Example

In the second example, the technician creates a complaint item about a product. As there is not yet a clear picture about the next steps for this ticket item, there is not an impact on target definitions. The same applies for external procurement for example in a DIY (Do it yourself).

6.4.6 Add Service Technician to Service Contract

Assign service technician to service contract as involved party.

This feature enables you to define one or more preferred technicians directly in the service contract.

> **i Note**
>
> The determination and sequence of service technicians from Registered Product, Service Contract, Account Team while ticket creation in SAP Cloud for Customer can be configured as custom solution using Partner Development Infrastructure (PDI).

Procedure

Follow the steps to enable the feature:

1. Navigate to *Business Configuration*.
2. Click on ▶ *Activities* ❯ *Service Contracts* ❯ *Maintain Involved Parties / Maintain Involved Item Parties* ❯ .

6.5 Service Contracts and Maintenance Plan

Maintenance Plan from Service Contract

Consider Covered Objects On Contract Item.

View objects on header and on item level as *Covered Objects* under *Contract Items*.

You can also establish *Service Contract* as alternative starting point for *Maintenance Plan* creation.

Add Contract Covered Object to Existing Maintenance Plans

Add covered objects of a contract to any existing maintenance plans, irrespective of whether the plans are already associated to the contract or not.

This feature enables you to access related maintenance plans through service contract. You can use the search option to select a suitable *Maintenance Plan* and choose in a multiselect table those covered objects of the current contract that are eligible for this maintenance plan to be taken up as *Maintenance Item*.

It enables you to access related maintenance plans through service contract. It isn't possible to add a covered object as maintenance item to a maintenance plan in which this covered object is already listed as the system check prevents creation of maintenance item duplicates in a selected maintenance plan.

The *Add Existing Maintenance Plan* option is personalized hidden and you can select it to enable the feature.

> **i Note**
>
> Ensure that the *Maintenance Plan* work center is assigned to you.

List or Delete Covered Objects in Existing Maintenance Plan

Display or delete *Maintenance Items* of a Maintenance *Plan* from the service contract.

If the associated covered objects of a service contract to a selected maintenance plan are deleted, then the maintenance plan also gets removed from the maintenance plan table of this contract.

6.6 Service Contract Determination and Assignment in Tickets

Learn how the systems uses contract determination to search for and reference to existing contracts created in the system as well as the assignment of tickets in contracts. Contracts are determined orders if they have the same product, customer (sold-to party) and org. data (sales org unit, distribution channel, and division).

Users can compare values entered as ticket references (such as *Products*, *iBase*, and *Serial ID*) to covered objects assigned to contract items to determine an applicable contract.

Explore how you can use the contract determination log to view which sales and services contracts were determined and why.

Learn how to use release authorized parties in contract determination.

Users can assign quantity contracts to eligible parties for call-off quantities in sales orders and sales quotes.

6.6.1 Compare Service Determination Relevance of Item Covered Objects in Ticket Header

Users can compare values entered as ticket references (such as *Products*, *iBase*, and *Serial ID*) to covered objects assigned to contract items to determine an applicable contract.

When working with tickets that have a contract, the solution considers covered object assigned to contract items. It also considers covered objects assigned to the contract header referencing covered objects that fit.

6.6.2 Use the Contract Determination Log

Explore how you can use the contract determination log to view which sales and services contracts were determined and why.

1. Go to ▌▶ *Administrator* ❯ *Service and Social* ❯ *Contract Support* ❯ *Contract Determination Log.* ❭
2. Go to *Basic* search or *Advanced Search*.
3. In the *Reference Doc ID* field, enter the coordinating number.
4. Click *Go*.
5. Highlight the desired result from the query list.
6. Look in the *Details* tab for matching results, matching attributes that lead to or prevent a contract determination for this reference document.

> i Note
>
> The log is available for sales orders, sales quotes, and work tickets.

6.6.3 Use Release Authorized Parties in Contract Determination

Learn how to use release authorized parties in contract determination.

Create a contract for an account. In the contract header, set the flag *Include Authorized Parties*. Next you can add the party role *Authorized Party*.

> i Note
>
> If required, from a contract, add the *Involved Parties* tab.

6.6.4 Include Eligible Parties for Call-Offs

Users can assign quantity contracts to eligible parties for call-off quantities in sales orders and sales quotes.

Users can choose from one of the following in Overview section of a sales contract.

- *Include Account Hierarchy*: The account of the contract and all subordinated accounts within the account hierarchy are considered for contract determination.
- *Include Authorized Parties*: The account of the contract and all authorized parties added to the involved parties of the contract are considered for contract determination.

> i Note
>
> To use include authorized parties, go to fine-tuning ▌▶ *Sales Contract* ❯ *Involved Parties* ❭ and activate the party role *Authorized Party*.

6.7   Service Contact Determination Logic

During contract determination, the number of contract items is reduced by excluding specific contract items in stages using the elimination process in the check logic.

The main goal is always to find the most applicable contract(s), as well inapplicable, blocked, or obsolete contracts. This allows the service technician to make an informed decision about the correct contract to use for a service ticket.

6.7.1 Account Hierarchy and Installed Base/Installation Point Contract Determination

Learn the contract determination logic for account hierarchy, installed base, and installation point (service reference objects).

To gain a better understanding, here are examples of account hierarchy contract determination.

One Contract without Covered Objects

The service technician creates a service ticket and adds the customer account details. If the customer has a contract covering all products and all serial numbers, the contract is always applicable.
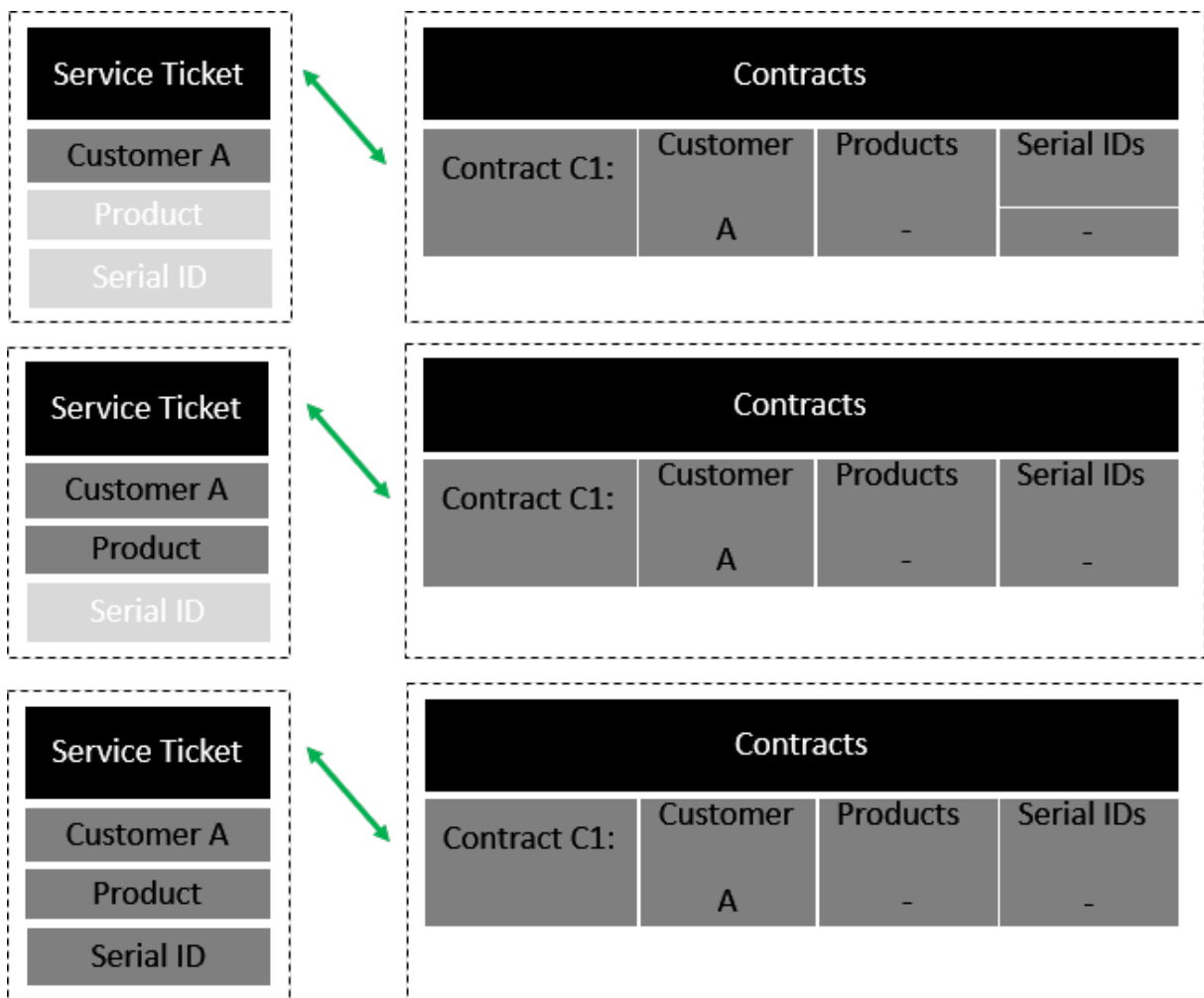
One Contract with Product as Covered Object

The service technician creates a service ticket and adds the customer account details. The contract is not found, because it is too specific. If the product P1 is entered, the contract is found because it matches exactly. The contract is also found if the *Serial ID* is entered, because all Serial IDs are covered.

Service Ticket
Customer A
Product
Serial ID

🚫

Contracts			
Contract C1:	Customer	Products	Serial IDs
	A	P1	S1

Service Ticket
Customer A
Product P1
Serial ID

🚫

Contracts			
Contract C1:	Customer	Products	Serial IDs
	A	P1	S1

Service Ticket
Customer A
Product P1
Serial ID S1

Contracts			
Contract C1:	Customer	Products	Serial IDs
	A	P1	S1
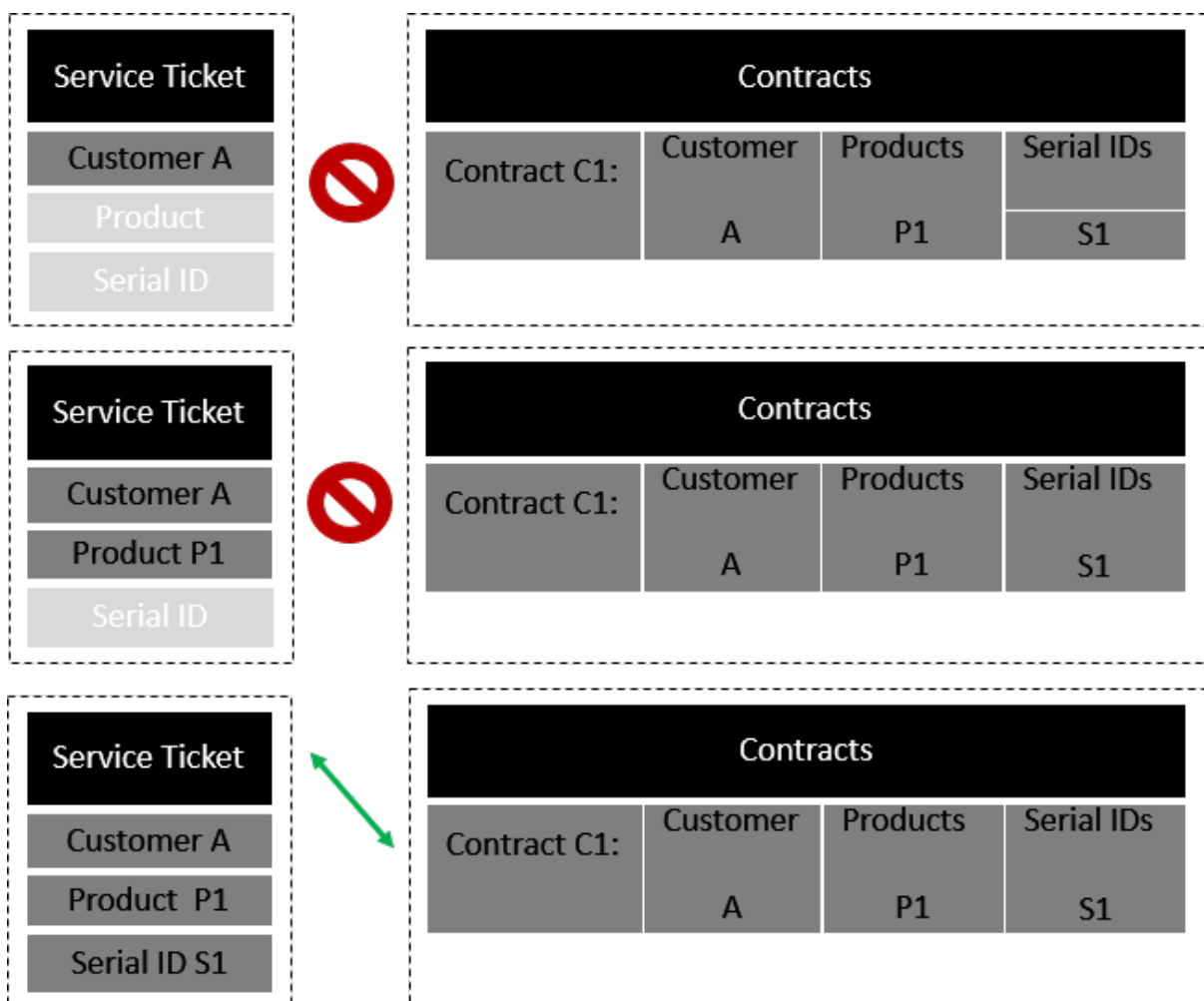
One Contract with Product and Serial ID as Covered Object

The service technician creates a service ticket. If the customer and the product are entered in the ticket, the contract is not found, because it is too specific. If the *Serial ID* S1 is entered in the ticket, the contract is found, because it matches exactly.
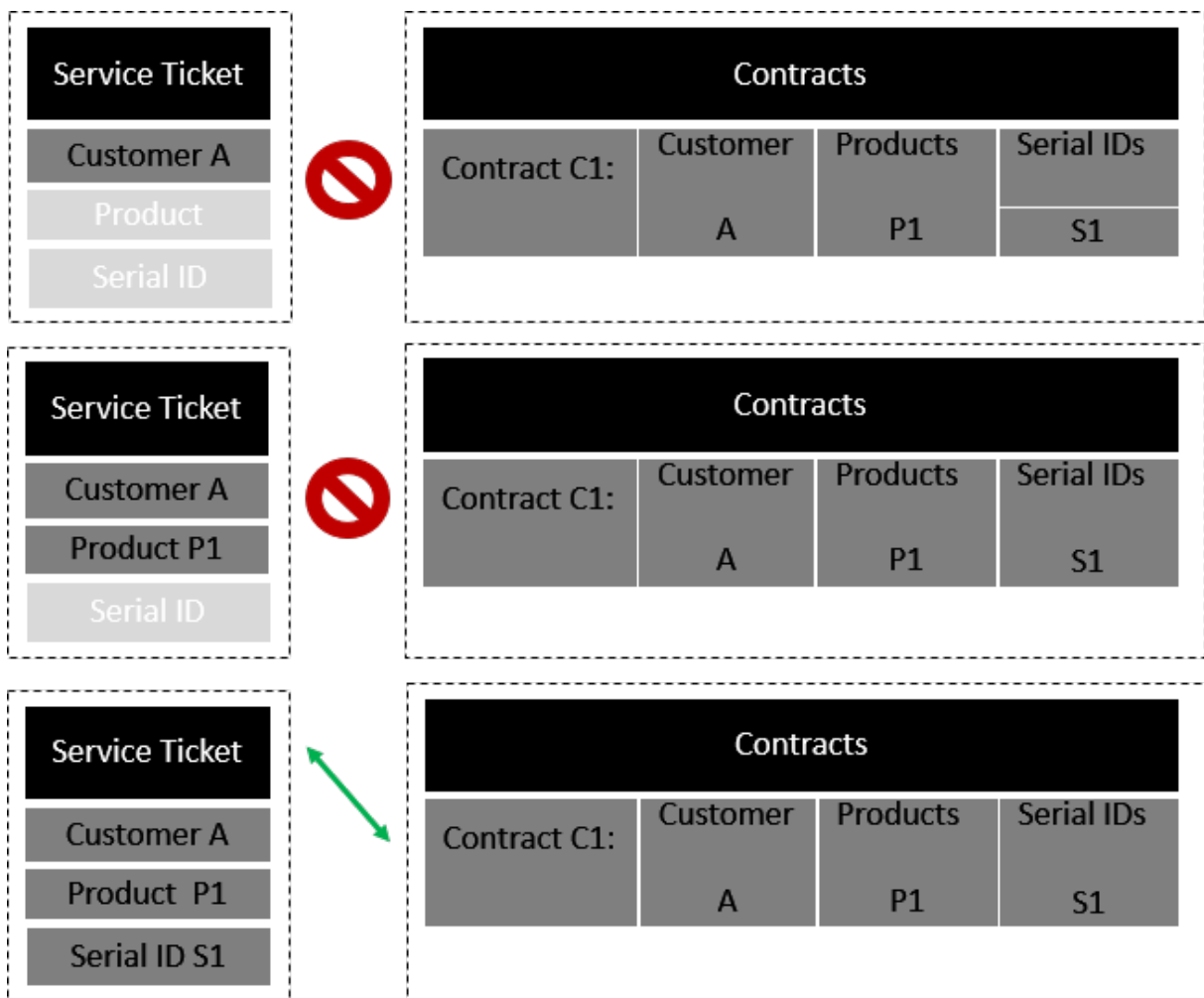
Multiple Contracts with Covered Objects

The service technician enters the customer in the service ticket. The solution logic determines that Product P1 and contract C1 are applicable. For product P2, contract C2 is applicable. For product P3, no contract is determined.
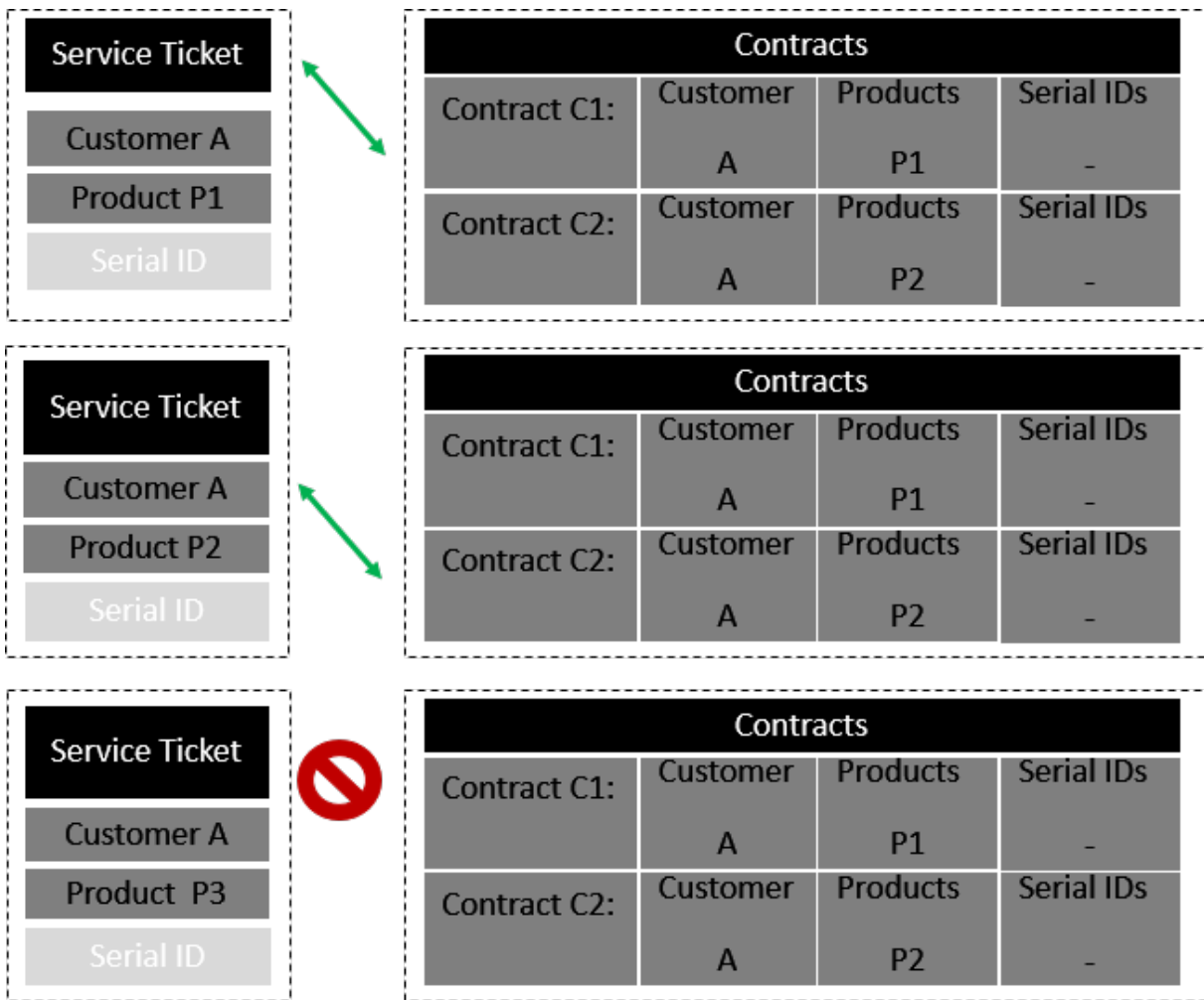
Multiple Contracts without Covered Objects

The service technician enters the customer account in the service ticket. Two contracts are found, both are applicable, and neither one is most applicable. Therefore, no automatic assignment is needed. The service technician receives a message to manually select a contract.
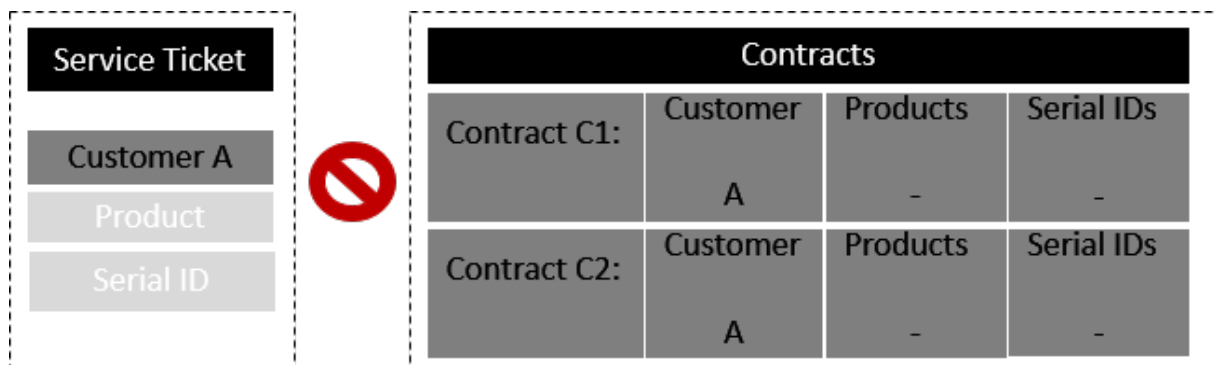
6.7.2 Installation Point Hierarchy Contract Determination

Learn the contract determination logic for Installation Point (service reference objects).

The service technician enters the *Installation Point* ID in the ticket and the solution states no contract exists. A contract does exist with an Installation Point, which is located one hierarchy overhead, meaning this contract is also applicable.

The most applicable contract is the contract of the *Installation Point*t element, which was entered in the ticket. If no contract exists, the most applicable contract is for the *Installation Point* element is located at the next hierarchy level.

6.7.3 Customer-Centric Determination

Learn about the contract determination logic sequences that are relevant for customer-centric.

In a service request header, the contract usage restriction code is considered in the determination logic. The contract has at item level a list of one or more contract usage restriction codes.

> **i Note**
>
> When your business uses customer-centric contract determination, the customer (account) is relevant in the search criteria.

If the contract usage restriction code of the service request header is covered in one of the list of the contract items. Then the contract is the most applicable. If no contract item has a list of contract usage restriction code, then all contract usage restriction codes are covered and this contract is also applicable.

6.7.4 Object-Centric Contract Determination

Learn about the object-centric contract determination logic.

The administrator scoped your system to determine the search strategy.

Enter the installation point and Installed base in the service ticket and the solution first searches for contracts and items

Note: When your business uses object-centric contract determination, the customer (account) is not a relevant search criterion.

Note: The solution locates contracts and items for customers (accounts) which are different from the customer in the service ticket.

The solution analyzes the contracts and items and ranks them in order of significance.

Example

A machine has an incident at customer A at site ABC for product 123 but the applicable contract (with product 123 as covered object) determined was made for customer B. If you create a ticket entering product 123 the relating contract is determined although the customer in the ticket is A.

6.7.5 Account Hierarchy Contract Determination Sequence Logic

Learn the contract determination logic for account hierarchy.

A service ticket is created using the customer ID. The solution does not recommend a contract. The customer does have a contract located in the hierarchy, meaning the contract is also applicable.

The most applicable contract is the contract for the customer entered in the ticket. If no contract exists, the most applicable contract is for the customer at the next hierarchy level.

Each customer from the hierarchy has their own contract. If in the ticket the company St. Ingbert, has been entered, the contract for company St. Ingbert is the most applicable. The two other contracts for company Germany and company Europe are also applicable.

The contract for company St. Ingbert is blocked and the ticket processor enters customer company St. Ingbert. Then, the contract for the company Germany is the most applicable and the contract for company Europe is also valid.

The contract for company St. Ingbert is blocked. The contract for company Germany is also blocked. The ticket processor enters customer company St. Ingbert. Then, the contract for the company Europe is the most applicable contract.

6.7.6 Use Account Hierarchy for Contracts

When working with contracts in accounts, users can set up details that consider *account* hierarchies for contracts.

1. Create a parent *account* with a child hierarchy.
2. From the parent *account*, navigate to *Contracts* and click *New* to create a contract.
3. In the contract, place a check mark in the *Include Account Hierarchy field.*
4. Navigate to the *Contracts* tab of the child *account* .
5. Click *Advanced Search* (*Involved Party* is the *Child account*) and place a check mark in the *Include Parent Accounts* field.

6. Search for and locate additional contracts from parent accounts.

6.8   Contract Integration

SAP ECC Inbound Replication for Contracts [page 420]
   Administrators can define SAP ECC contract transfer behavior in business configuration for contracts.

Define Quote and Contract Document Types for SAP ERP Integration [page 420]
   Administrators can define quote, sales and service contract document types for SAP ERP with SAP
   Cloud for Customer quotes, sales, and service contracts.

6.8.1 SAP ECC Inbound Replication for Contracts

Administrators can define SAP ECC contract transfer behavior in business configuration for contracts.

For each document type an administrator should select one of the following contract replication types:

- *Bi-directional* - Contract changed are transferred to and from SAP ECC.
- *Inbound* - Contract changed are only transferred from SAP ECC.

> → Remember
>
> If none of the replication selections are made (blank selection), contract changes are not transferred to or from SAP ECC.

Administrators can configure contract replication by navigating to ▶ *Business Configuration* ❭ *Implementation Projects* ❭ *Open Activity List* ❭ *Contracts (Sales or Service)* ❭ *Document Types* ❭ *Maintain Document Types.* ❭

6.8.2 Define Quote and Contract Document Types for SAP ERP Integration

Administrators can define quote, sales and service contract document types for SAP ERP with SAP Cloud for Customer quotes, sales, and service contracts.

The fine-tuning of *Document Types* allows multiple settings for SAP ERP integration. You can leverage each document type as a special business scenario/use case. Depending on your requirements, you can create multiple document types for your desired business scenarios.

Go to ▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Activity Name: Sales Contracts, Service Contract, or Sales Quotes* ❭ *Document Types* ❭ *Maintain Document Types.* ❭ Select your *Document Type* and modify it to your business solution requirements.

External Pricing – A check in the box enables an external application such as SAP ERP, synchronously requests prices. The transaction simulation determines not only pricing, but sales quotes, free goods, product availability, and credit status based on SAP ERP customizing for this document type. From SAP Cloud for Customer, you trigger the external application, by clicking ▶ *Action* ❭ *Request External Pricing.* ❭

Replication – Administrators define the sales quote and the sales and service contract transfer behavior from your SAP on-premise system to your cloud solution by selecting one of the following options:

- *Bi-directional* – Sales quote edits in your cloud solution are replicated to your SAP on-premise system, syncing both quotes.

  > → Remember
  >
  > Your SAP on-premise system is the leading system for these sales quotes, sales, and, service contracts. Quotes created in your cloud solution can be replicated to your SAP on-premise system from ▶ *Action* ❭ *Submit.* ❭ Quotes created in SAP ERP can be edited in SAP Cloud for Customer and the changes are replicated in SAP ERP.

- *Inbound* – Quote edits completed in your cloud solution are not replicated to your SAP on-premise system. Those quotes are overwritten if further replications are triggered from your SAP on-premise system.

  > i Note
  >
  > We recommend that you control editable fields and actions from the page layout and only open extension fields that do not require replication. (Creation of the sales quote is only possible in SAP ERP and changes performed in SAP Cloud for Customer are not sent to SAP ERP).

- *Empty* – Leaving this field blank indicates the sales quote stays in SAP Cloud for Customer, but this option still allows you to request external pricing.

> i Note
>
> This configuration only applies to new sales quotes as well as sales and service contracts. Existing sales quotes and sales and service contracts behave using the inherited document type configuration. Existing sales quotes and sales and service contracts behave as specified from the previous active document type configuration.

Asynchronous Pricing – Administrators can modify the settings for external pricing. A synchronous call is required to retrieve the complete pricing result from the SAP on-premise system to your cloud solution. Replicated sales documents also require a synchronous pricing update once the sales document is updated during a save in SAP Cloud for Customer.

With this configuration, if the document was previously replicated, administrators can disable the synchronous pricing call to the external system. In addition, you can disable the synchronous call completely, which is valid for quotes created in your cloud solution. For both configuration options, the pricing status needs to be calculated successfully through the asynchronous call from the external system. Select the option that suits your business needs.

- *Empty* – Leaving this field blank triggers an automatic (once replicated) synchronous pricing call activation (You see pricing-related errors, but configuration has performance impacts.).
- *After replication* – If document was replicated successfully, an automatic synchronous pricing call is deactivated.
- *Always* – An automatic synchronous pricing call is always deactivated (leads to a performance advantage, but possible pricing call error messages are no longer displayed directly in the UI, only asynchronously). No

matter the configuration, you can trigger pricing synchronously by clicking ▮▶ *Action* ❯ *Request External Pricing.* ▮◀ With this configuration, avoid quote approvals that include external pricing elements.

> **i Note**
>
> To avoid data inconsistencies between SAP ERP and SAP Cloud for Customer, only replicated contracts are used in tickets.

> **→ Remember**
>
> Only new and sales and service contracts and sales quotes inherit changes in the document type configuration. Existing contracts and sales quotes behave as specified in past active document type configuration.

6.9 Contracts Offline

Learn about working with service contracts in offline mode.

Offline service contract features include search and match of ticket parameters to the applicable contract parameters.

General availability has been made for administrators to configure contract item determination to use in offline mode. Go to ▮▶ *Business Configuration* ❯ *Implementation Projects* ▮◀. Select your project and navigate to ▮▶ *Edit Project Scope* ❯ *Questions* ❯ *Service* ❯ *Customer Care* ❯ *Service Request Management* ▮◀ and select the scoping question: *Do you want to determine contract items for tickets in offline mode?*

Administrators can explore the contract offline sync tranfers details.

6.9.1 Offline Service Contract Covered Objects Item Determination

Offline service contract features include search and match of ticket parameters to the applicable contract parameters.

> **i Note**
>
> *Offline Service Contract Covered Objects in Item Determination* is available for both test and productive use. To enable this phased delivery feature, create an incident or contact your SAP Cloud for Customer representative.

Ticket Search Parameters	Covered Object Comparison Parameters	Restriction
Reference Product ID of Ticket Item	Against Product ID (also as category) of Contract Covered Object (Item)	Without Product Category Hierarchy
Reference Serial ID of Ticket Item	Against Serial ID (related Installation Point) of Contract Covered Object (Item)	
Reference Installation Point ID of Ticket Item	Against Installation Point ID of Contract Covered Object (Item)	Without Installation Point Hierarchy

6.9.2 Configure Offline Contract Item Determination

General availability has been made for administrators to configure contract item determination to use in offline mode. Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Service* ❯ *Customer Care* ❯ *Service Request Management* ❯ ❯ and select the scoping question: *Do you want to determine contract items for tickets in offline mode?*

6.9.3 Use Offline Contract Deviation Sync Transfer Details

Administrators can explore the contract offline sync tranfers details.

No deviation (typical use case) - Proposed [e.g. offline] Contract = ´[online] Contract´ ´Conflict´ constellation:

MOST APPLIBALE CONTRACT: applicable ´Proposed Contract ´ [= that is the most applicable Contract in online mode] was transferred from offline to online field ´Contract´

APPLICABLE CONTRACT: applicable ´Proposed Contract´ [~ and no most applicable exists in online mode] was transferred from offline to online

NO CONTRACT PROPOSED: (as in online)

Deviation:\u000BRecommendation is to set up Workflow Rules for Tickets with critical Contract Transfer Detail Values (such as ´inapplicable proposed contract...´, ´no contract proposed´) to filter and check final Contract Assigment to these Ticket Items:

TRANSFERRED BUT MOST APPLICABLE EXISTS: applicable ´Proposed Contract´ [~ but most applicable Contract exists in online mode but was not taken] was transferred from offline to online.

INAPPLICABLE CONTRACT NOT TRANSFERRED: inapplicable ´Proposed Contract´ [=in online mode this contract can not (!) be determined] which was not transferred from offline to online.

NO CONTRACT PROPOSED BUT MOST APPLICABLE CONTRACT EXISTS: no ´Proposed Contract´ [~ but most applicable Contract exists in online mode] was transferred from offline to online

NO CONTRACT PROPOSED BUT APPLICABLE CONTRACT EXISTS: no ´Proposed Contract´ [~ but applicable Contract exists in online mode] was transferred from offline to online

Resolution of Deviation: underlying Question is: Should the online or the offline determined contract ´rule´?

If online contract item should be used (normally better since offline is only a proposal) then trigger action Redetermine, select manually the contract item in OVS or use value:

INAPPLICABLE PROPOSED CONTRACT REJECTED

If offline contract item should be used (rare use case) then set the "Contract Transfer Detail":

PROPOSED CONTRACT MANUALLY ACCEPTED: Accept offline proposal [= a) no ´ Proposed Contract ´ was manually assigned offline (e.g. no contract warranty due to customer fault) nevertheless even if online applicable contracts exist: then no contract should be set online. b) an applicable ´ Proposed Contract ´ was determined offline and this one should be used although other/ most applicable contract(s) online exist(s)] \u000BINAPPLICABLE PROPOSED CONTRACT ENFORCED inapplicable ´Proposed Contract [=in online mode this contract can not (!) be determined] which nevertheless was transferred from offline to online and there enforced to online field ´ Contract ´

6.10   Contract Pricing

Learn how the system uses contract pricing to determine the price of a material based on the contract.

> Request External Pricing from SAP ERP [page 424]
>   The contracts solution retrieves complete price information including tax from the SAP ERP external system.
>
> Check Output Pricing to View All Price Components [page 425]
>   Administrators can enable the new action *Check Output Pricing* using adaptation mode. This action allows users to view all price components that are available in the output form message as now they are defined as print relevant in the system.

6.10.1   Request External Pricing from SAP ERP

The contracts solution retrieves complete price information including tax from the SAP ERP external system.

Context

Your administrator has set-up external pricing in your solution so that you can retrieve complete price information from SAP ERP for your service contracts.

Complete all of the steps below before you request external pricing from SAP ERP.

Procedure

1. Open the contract which should already include the covered objects and items.

2. Navigate to the *Items*.

3. Select *Billing Plan* to add the customer's desired details, such as how and when they want to billed for the contract services.

   These prices will vary depending on how your administrator has set-up the solution.

4. Navigate to *Pricing* where you can enter various types of discounts per line item.

5. Save your entries.

6. Select *Request External Pricing* in order to retrieve the pricing from the external *SAP ERP* system.

   Now all of the details the customer needs in order to sign the contract are available.

7. Select ▌▶ *Preview* ❯ *Send* ▌ and the customer will receive a preview of the contract document.

   Once the customer signs the contract it should be sent back to your company.

8. Select *Activate* and the contract status is changed to *Active* or *Ready* (if the contract is agreed but only valid for a future date).

9. Select *Transfer* and the contract is sent to SAP ERP where all details are stored and a contract is created.

   The solution will provide you with transfer status information and the *External ID* from SAP ERP.

   The contract ID displayed in the contract header is the number created by SAP Service Cloud. The *External Reference* is any number or set of characters the customer desires to use and is entered manually in the header by the contract administrator or associate.

6.10.2 Check Output Pricing to View All Price Components

Administrators can enable the new action *Check Output Pricing* using adaptation mode. This action allows users to view all price components that are available in the output form message as now they are defined as print relevant in the system.

6.11 Contract Reporting

Create reports using the data collected from your contracts to better understand them and make improvements.

Use Item Covered Objects in Reports [page 426]
   Administrators can include item covered objects in report by navigating to ▌▶ *Business Analytics* ❯ *Design Data Sources* ❯ *Contract Item Covered Objects* ▌.

Restrict Excel Export for Contracts [page 426]
   Administrators can configure a restriction so that business role users cannot perform Excel exports for contracts.

6.11.1 Use Item Covered Objects in Reports

Administrators can include item covered objects in report by navigating to ▐▶ *Business Analytics* ❯ *Design Data Sources* ❯ *Contract Item Covered Objects* ❯.

Once configured, to include item covered objects in reports:

1. Go to ▐▶ *Business Analytics* ❯ *Design Reports* ❯ *New* ❯.
2. From the guided activity, follow the steps beginning by entering a report name.
3. Select the desired characteristics.
4. Define the variables.
5. Review your entries and save your changes.
6. Create a view for your report.

6.11.2 Restrict Excel Export for Contracts

Administrators can configure a restriction so that business role users cannot perform Excel exports for contracts.

Configure Excel export authorization restrictions by navigating to ▐▶ *Administrator* ❯ *Business Roles* ❯ *Select role (that includes the Contracts work center)* ❯ *Fields & Actions* ❯ *Business Actions Restrictions* ❯ *Add row* ❯ and search for Microsoft Excel.

6.12 Contract FAQs

Having trouble using contracts? Check this list of questions and answers for help.

6.12.1 Can I use custom fields in a contract?

You can use adapted fields in contracts.

Yes, creation or adaption of customer fields are possible and will be considered for contract template usage.

6.12.2 Is there a contract service level priority before a standard SLO determination?

Learn about contract service level priorities and Service Level Objective (SLO)s.

Example: If arrival at the customer site is guaranteed by a standard service level is eight (8) hours, but the contract service level is one (1) hour, then the contract service level will be used in the ticket.

6.12.3 How do I search for expiring contracts?

Your administrator can set-up work flow solutions to be used for renewal purposes.

These work flows can be set-up using notifications and/or opportunities informing you in advance when contracts are due to expire. In addition, with the *Contracts Expiring Soon* query you can filter for contracts where the *Ends On* date lies between the current date and the current date plus 28 days.

6.12.4 What checks are made during contract activation?

When you activate a contract, the system performs several checks to ensure that the contract is valid.

Listed below are the contract activation checks:

- A contract which must have a start and end date and the end date must be after the start date
- The covered objects you have entered added parties. The system checks whether they exist in the system

6.12.5 Which type of determinations occur during ticket reference object modifications?

Learn what happens to contract determination, when about the service ticket objects are modified.

The service technician creates a ticket and adds the mandatory business objects such as the customer account.

One of the following fields is changed at item level and item service reference objects level of the ticket. The contract item determination starts automatically for the ticket item:

- *Product* (Item product)
- *Usage Restriction*
- *Product* (Referenced product)
- *Serial ID*
- *Installed Base*
- *Installation Point*

6.12.6 Which search criterion is used when matching contract determination for tickets?

Learn about the search criterion used in contract determination for tickets.

The service technician creates a ticket and adds the mandatory business objects such as the customer account.

If one of the following fields is changed at ticket header level, the contract determination is started automatically for the header and service reference objects, including all ticket items:

- *Usage Restriction*
- *Customer*
- *Product*
- *Serial ID*
- *Installed Base* (IBase)
- *Installation Point*

6.12.7 Can users display SAP ECC status for contracts?

Users can view SAP ECC statuses in the *Contracts* overview. The *External Status*, *External Reference Status* (relevant only for sales quantity contracts call-offs), and *External Invoice Status* are available on the header and item level.

7   Sales Quotes

Sales quote processing is used when offering products to customers and prospects in accordance with specific terms with fixed conditions.
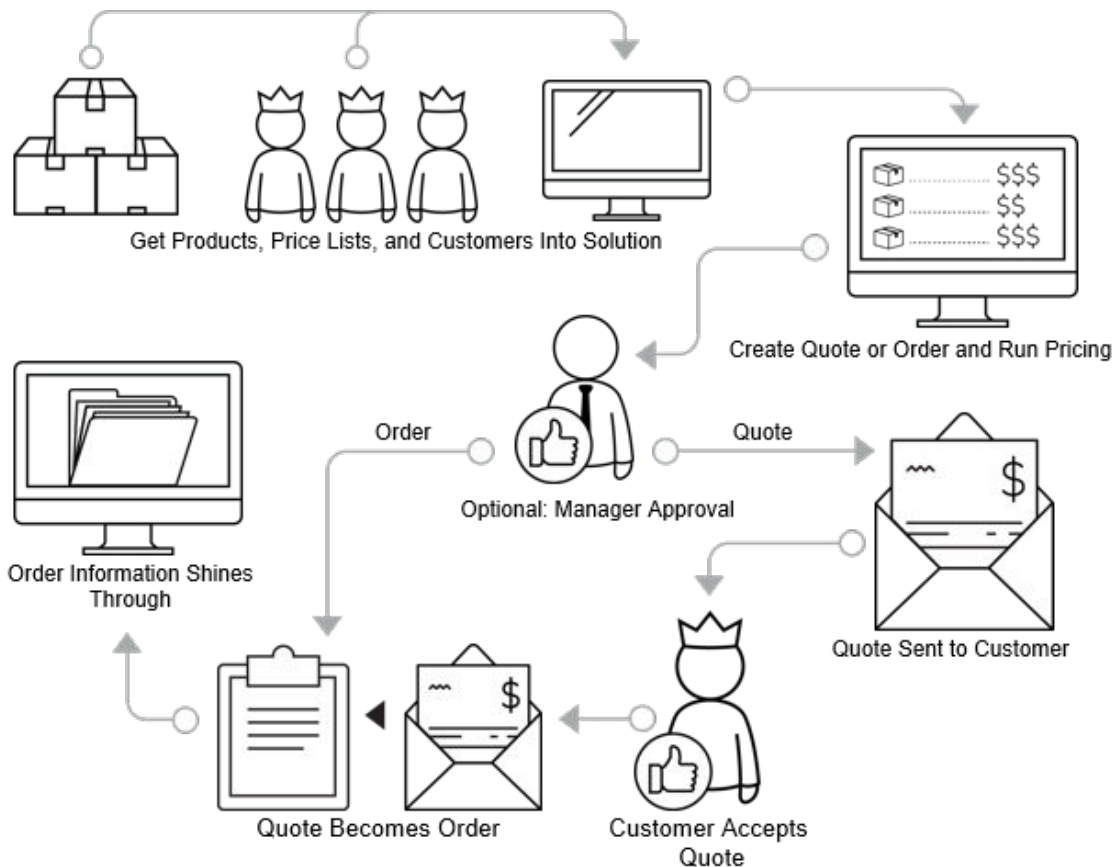
Sales quotes are presented to existing customers, prospects, or potential buyers to have the chance to review the costs of products or services your company offers.

Quotes can be created directly from an opportunity and include the products from that opportunity. With SAP Cloud for Customer, your company sales professionals can create and maintain quotes using a desktop or a tablet device, either online or offline.

Your administrator creates and then activate product lists to be used in your quotes. With product lists, you can combine a set of products associated with accounts. When you create a sales quote for accounts that has associated product lists, the product list appears in the form.

You can quickly create a quote, copy one, or modify an existing quote. You add or update items (products and or services) that reside in your company database. You can also add and view more details such as external references, notes, and involved parties. A company administrator configures and modifies the fine-tuning activity for sales quotes to meet the needs of your company. This solution set-up offers you, the sales representative, more possibilities to work with quotes to meet your needs.

With the solution, you can collaborate with your sales team or other colleagues and set-up approval workflows before presenting quotes to customers or prospects. Elements that affect quotes such as party processing, document types, integration, and follow-up documents, are configured by your administrator to enhance the sales quotation process.

Example

A sales representative creates a sales quote from an opportunity. Involved parties, products, as well as related quantities are copied to the sales quote.

The Administrator has set-up the solution, which uses details such as accounts, products, and date to calculate net value. The sales representative can overwrite the automatically determined prices and discounts or add further discounts and surcharges. Depending on the system configuration, the sales quote may require approval, when thresholds such as total net value or total given discounts are exceeded.

The sales representative sends the sales quote to the customer according to the output settings. If the customer accepts the sales quote, it can be set to *Won* and the status changes to *Completed*. With an external integration, such as SAP ERP, you can also transfer the sales quote into a sales order in the external system.

7.1 Scope and Configure Sales Quotes

Administrators can configure sales quotes using scoping, scoping questions, and fine-tuning activities.

> → Recommendation
>
> We recommend that you review all the scoping questions in the areas that are relevant and that you have included in your scope. When you select a question, more information appears on the tabs in the details section of the screen.

Scoping questions and fine-tuning activities that are straightforward may not be included in this list.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◀. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Scoping* ❯ *Sales* ❯ *Product and Service Portfolio for Sales* ❯ *Sell Standard Products* ◀.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◀. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Scoping* ❯ *Sales* ❯ *New Business* ❯ *Sales Quotes* ◀.

7.1.1 Enable Sales Quotes

To use sales quotes, administrators must add the ability to sell standard products, and activate sales quotes to the scope of the project.

Sales quotes enable you to sell products and services to prospective customers interested in your them. You can offer prospects a quote with product details, including prices and discounts.

> → Recommendation
>
> When you log on as an administrator, you can find the scoping questions under ⫿▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ⫿▶ *Edit Project Scope* ❯ *Implementation Focus* ❯ *Questions* ❯ *Sales* ❯ *Product and Service Portfolio for Sales* ❯ *Sell Standard Products* ❯ *Business Option: Sell from Stock* ❯. Review and place a checkmark under *You will be able to sell products*.

7.1.2 Define Item Types

Administrators can explore and learn how to define item types.

Item types determine how an item category behaves in a sales document. Item item types are not necessary, but are relevant if you replicate quotes with an on premise system and administrators should remember to configure document types.

You can define alternative item types for the item types delivered in the standard solution. These alternative item types are then displayed for the corresponding items under the *Products* tab for sales orders. You can use these custom item types to process items based on SAP ERP item categories. You can also use item types for, in order simulations to retrieve external pricing.

Define your own item types to reflect your company practices:

1. To quickly navigate to the fine-tuning activity, go to ⫿▶ *Business Configuration* ❯ *Overview* ❯ *Sort by: Activities* ❯ *Search* ❯ and type *Sales Quotes*.
2. Click ⫿▶ *Sales Quotes* ❯ *Item Types* ❯ *Maintain Item Types* ❯.
3. Click *Add Row*.
4. Enter the desired details and save your entries.

> i Note
>
> If you want to define an item as a free sample or free good that should not affect pricing, flag it as *Not Relevant for Pricing*. When an item that is not relevant for pricing is added to a quote, it will not contain a price. However, you can still add a price for this product manually.

7.1.3 Define Item Type as Not Pricing Relevant

Administrators can define items as a free sample or free good so that pricing is not affected.

You can define item types as not pricing relevant. The activity allows users to only add the item type to the item without setting the price to zero or a 100% discount. For example, a product is added to quote as a free good or sample.

1. To quickly navigate to the fine-tuning activity, go to ⫿▶ *Business Configuration* ❯ *Overview* ❯ *Activities* ❯ *Search* ❯ and type *Sales Quotes*.
2. Click ⫿▶ *Sales Quotes* ❯ *Maintain Item Types* ❯.

3. Click *Add Row* or select existing row.
4. Place a checkmark in the *Not Pricing Relevant* box.
5. Save your entries.

> **i** Note
>
> This *Not Pricing Relevant* item type is available in external pricing and offline pricing sales orders. You can still add a price for this product manually.

7.1.4 Define Item Increment per Document Type

Administrators need to define item increment numbers, which allow you to control *Item Increment* and *Sub Item Increment* ranges.

1. To quickly navigate to the fine-tuning activity, go to ▐▶ *Business Configuration* ❭ *Overview* ❭ *Activities* ❭ *Search* ❭ and type *Sales Quotes*.
2. Click ▐▶ *Sales Quotes* ❭ *Maintain Document Types* ❭.
3. Click *Add Row* or select an existing row.
4. Enter or modify the desired *Item Increments*.
5. Save your entries.

> **i** Note
>
> Increment configuration eliminates limitations for bill of materials (BOM) explosion when there are many *Sub Items* in external pricing.

7.1.5 Configure Follow-up Item Type Determination

Administrators can set up your solution to determine the item type for follow-up documents. The follow-up sales quote to sales order process allows you to copy item types that are used for SAP ERP and CRM processing.

1. To quickly navigate to the fine-tuning activity, go to ▐▶ *Business Configuration* ❭ *Overview* ❭ *Activities* ❭ *Search* ❭ and type *Sales Quotes*.
2. Choose *Maintain Follow-Up Item Determination*.
3. Choose *Add Row*.
4. Enter the desired details and save your entries.

> **i** Note
>
> Users can use adaptation or personalization to add the item type to the sales quote product table.

> **i** Note
>
> You can also use code list restrictions to filter item types based on a document type.

7.1.6 Configure Code List Restrictions

Administrators need to configure code list restrictions to restrict the display of certain code values for a specific set of users in quote and order documents.

1. Go to ▎▶ *Administrator* ❯ *General Settings* ❯ *Code List Restrictions* ▎.
2. Click *New*.
3. Select the desired *BO* field, such as `Party Roles`, `Payment Terms`, or `Reason for Rejections`.
4. Maintain the restrictions and save your changes.

7.1.7 Configure Number Ranges

Administrators need to configure number ranges to define the range of numbers assigned to sales quotes.

1. To quickly navigate to the fine-tuning activity, go to ▎▶ *Business Configuration* ❯ *Overview* ❯ *Activities* ❯ *Search* ▎ and type *Number Ranges*.
2. Click *Maintain Number Range*.
3. On the following screen, review the default begin and end number that applies to sales quotes in the solution.
4. If you wish to define a different number range, choose *Change Current Number*.
5. On the following screen, enter the new current number, then click *Save and Close*.
6. Click *Save and Close* again.

7.1.8 Create Document Types

Administrators can create and maintain document types. They can be used in the system and within reports to filter documents.

Procedure

1. Navigate to ▎▶ *Business Configuration* ❯ *Overview* ❯ *Activities* ❯ *Search* ▎ and type *Maintain Document Types*.
2. Click *Add Row* and enter the required document type code and a description.

   Decide whether you want to enable your document type for *Direct Customer Acceptance*. This means that a quote does not need printouts or a confirmation because the customer has already accepted the quote directly during the sales rep visit.

   Depending of your scope decide whether you want to enable the document type for *External Pricing*. This means that the prices are calculated in an external system and are shown then in the quote.

3. If you want to define custom number increments for items or subitems, enter the increments you want to use.

> **i Note**
>
> Increment configuration allows you to explode a bill of material (BOM) explosion with lots of subitems via external pricing.

4. Save your entries.

    Deleting Document Types

> **i Note**
>
> You can only delete document types that have not been used in the system. Select the entry you want to delete and click *Delete*.

7.1.9 Configure Payment Terms and Incoterms

As an administrator, you can configure payment terms and Incoterms (International Commercial Terms) to define when an invoice must be paid as well as the charges you company or the buyer pays.

Locate the fine-tuning activity by navigating to ▶ *Business Configuration* ❭ *Overview* ❭ *Search* ❭ *Accounts* ❭ and click *Maintain Payment Terms*.

1. Click *Add Row*.
2. Enter the desired details
3. Save your entries.

> **i Note**
>
> Payment terms are defaulted from the sales data of the account to the sales quote.

7.1.10 Configure Copy of Quote Pricing Date and Incoterms

If a sales quote is copied, administrators can configure the copying of the *Pricing Date* and *Incoterms*.

Procedure

1. To activate this action, navigate to *Fine-Tune.*

2. Select ▶ *Sales Quote* ❭ *Document Types.* ❭

3. Select the desired *Pricing Date* configuration details.

Related Information

7.1.11 Configure Incoterms

Administrators need to configure incoterms.

1. Go to ▶ *Business Configuration* ❯ *Overview* ❯ *Activities* ❯ *Search* ❙ and type *Incoterms*.
2. Click *Add Row*.
3. Enter an *Incoterm* ID and description.
4. Set the *Location Mandatory* flag accordingly.
5. Save your entries.

7.1.12 Configure External Pricing Call

Administrators can learn about external pricing call configuration to retrieve the complete pricing result from SAP on premise systems to your cloud solution.

If external pricing is selected, a synchronous call is required to retrieve the complete pricing result from the SAP on premise system to your cloud solution. Replicated sales documents also require a synchronous pricing update once the sales document is updated during save.

If the document was previously replicate, with this configuration, you can disable the synchronous pricing call to the system,. In addition, you can disable the synchronous call completely, which is also valid for quotes created in your cloud solution. For both configuration options, the pricing status is calculated successfully through the asynchronous call from the external system. The user can still trigger pricing synchronously by clicking the asynchronous call action.

To configure external pricing call, go to fine-tuning activity ▶ *Sales Quotes* ❯ *Document Types* ❙.

Asynchronous pricing does not expose *Credit Limit*, *Credit Exposure Amount*, or *Credit Exceeding Amount*. If pricing simulation was triggered in the system once for that corresponding pricing procedure, you can add conditions on header and item level. Pricing elements exposed to the item and header are also supported for asynchronous pricing.

7.1.13 Configure Canceled Items in Total Value Calculation

For internal pricing, administrators can configure a reason for rejection to keep the total value in quotes and orders, including quotes that are completely or partially lost.

To configure the canceled items in total calculation, go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯ *Your Implementation Project* ❯ *Open Activity List* ❯ *Fine-Tune* ❯ *Reason for Rejection* ❙ and choose the desired *Available Reasons for Rejection* that should not reduce the *Total* calculation.

> **i Note**
>
> Canceled items are not displayed in the output message.

7.1.14 Configure Default Pricing Date

As an administrator, learn how to configure the default pricing date.

Define default logic for the *Pricing Date*.

- *(Today's Date)*
- *Requested Date (Header)*

Configure the pricing date defaults by navigating to the fine-tuning activity ▌ *Sales Quote* ❭ *Document Types* ❭.

Highlight the desired document type and select the desired logic type from the pricing date dropdown field.

7.1.15 Configure Default Requested Date

As an administrator, learn how to configure the default requested date.

Define the sales quote default requested date, which is available in the header area.

Configure quote validity and requested dates by navigating to the fine-tuning activity ▌ *Date Profiles* ❭ *Date Variable for Sales* ❭ *Sales Quotes* ❭.

Highlight the desired document type and select the desired logic type from the pricing date dropdown field.

> **i Note**
>
> The requested date on header is copied to requested date on items. Manually changed dates on items are not overwritten by the header date.

7.1.16 Configure Inbound Quote Replication

Administrators can explore how to configure inbound quote replication to take place only from inbound SAP on premise systems.

> **→ Remember**
>
> Quote edits completed in your cloud solution are not replicated to your SAP on premise system. If further replications are triggered from your SAP on premise system, edits are overwritten.

To configure inbound quote replication, go to fine-tuning activity ▌ *Sales Quotes* ❭ *Document Types* ❭.

> **i Note**
>
> We recommend that you control editable fields and actions from the page layout, and only open extension fields that do not require replication.

7.1.17 Configure Access Control for Sales Quotes

Administrators can learn how to configure user access to sales quotes.

Administrators restrict read and write access to sales quotes by navigating to ▌▶ *Business Roles* ▶ *Access Restrictions* ▶ *Access Context 1015* ▐.

> **→ Tip**
>
> Select a *Restriction Rule* to view a brief summary of the rule.

7.1.18 Configure Workflow Rules

As an administrator, learn about configuring workflow rules triggers automatic e-mail messages, notifications, field updates, and actions for sales quotes and other business objects.

Workflow rules are used to update fields in sales quotes. Administrator can define work flow rules for various types of items:

- Accounts
- Contacts
- Individual customers
- Opportunities
- Tickets
- Contracts
- Sales Quotes
- Visits

Access the workflow rules worklist by navigating to ▌▶ *Administration* ▶ *Business Operations* ▶ *Workflow* ▶ *Workflow Rules* ▐.

You can also configure workflow rule recipient determination. This configuration allows users to select account team and territory team notifications for sales quotes. Access the rule by navigating to ▌▶ *Administrator* ▶ *Workflow Rules* ▐. Define a new rule, under *Recipient Determination*, add a determination for *Account Team* and or *Territory Team*.

7.1.19 Configure Approvals

Administrators can explore how to incorporate conditions into the sales quote approval process, such as limits to the amount an approver is allowed to approve.

Activate the sales quote approval process under ▶ *Business Configuration* 〉 *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Sales* 〉 *New Business* ▶.

Once you scope sales quote, then you detail the approval process. For this step, you define the approval conditions and an approver before the approval process is ready to use. Navigate to ▶ *Administrator* 〉 *Approval Processes* ▶.

> **i Note**
>
> At least one approval process must be active. To define an approval process, copy the default approval process and adapt the approval validity, ensuring one process has an unlimited validity.

7.1.20 Configure Sales Quote Versioning

Administrators can configure sales quote versioning, allowing users to send customers sales quotes with the same sales quote ID (*Group ID*) in addition to a version number.

Configure sales quote versioning by navigating to ▶ *Business Configuration* 〉 *Scoping Element: Sales* 〉 *New Business* 〉 *Sales Quotes* ▶ and place a check mark for the question *Do you want to user Sales Quote Versioning?*

User can only create an external follow-up document for SAP ERP for quote that are not in *Active* status and have been submitted.

Quote versions cannot be created in offline mode.

If a quote is replicated to or from an external system, versioning is no longer possible.

> **→ Remember**
>
> Adjust the form templates (aside from the *Sales Quote Demo*) so that the *Group ID* appears in the printout.

7.1.21 Configure Block Assignment

Administrators can set up block reasons for document types. The block assignments allow you to stop the creation of sales quotes, sales orders, or other transactions for certain accounts considering their sales area.

Procedure

1. Go to ▶ *Business Configuration* ▶ *Implementation Projects* ▶. Select your project and navigate to ▶ *Open Activity List* ▶ *Fine-Tune* ▶ *Accounts* ▶.
2. Select *Sales Document Order Block*.
3. Add a row for each order block reason you want to use to block sales documents and select from the list of document types.
4. Define the following:

   ○ *Order Block Reason*: Reasons that you would like to use to block sales order creation for accounts

   > **i Note**
   >
   > The blocking reasons that you maintain here are mapped to the blocking reasons configured in an ERP system.

   ○ *Document Type*: Assign a document type to the order block reasons to enable blocking sales order creation for accounts.
5. Assign the blocks to accounts and block them in the header section of accounts.

7.1.22 Configure Re-submit for Quote Approvals

Administrators can learn how to configure resubmit for sales quotes. Once quotes have been approved, the business option allows your company to control the approval status and or the output status.

If you do not select the business option, each change in the quote (aside from adding attachments) changes the approval status to *Not Started*. Also, to further process the quote, users must submit it again for an approval and output.

> **i Note**
>
> If a quote with bi-directional replication to SAP on Premise system exists, a reset of the approval status is not possible.

When you select this option, the automatic reset of these statuses from most modifications is deactivated. Instead, the reset can be configured based on conditions in the workflow rules. The reset is achieved from one of the following actions:

- *Reset Submit* (for approval and output statuses).
- *Reset Output Status* (for only the output status).

Configure *Re-submit for Quote Approvals* by navigation to ▌▶ *Business Configuration* ❯ *Scoping Element: Sales* ❯ *New Business* ❯ ❯ *Sales Quotes* ❯ *Do you want to control the reset of the approval status and output status via workflow rules?* ▌

Continue the setup by:

1. Defining workflow rules by navigating to ▌▶ *Administrator* ❯ *Workflow Rules* ▌.
2. Defining conditions that should trigger additional approvals in the workflow rule and select the desired action users can choose from:
    ○ *Reset Submit* - The action resets the approval status to *Not started*, including the output status. To further process the quote, users click ▌▶ *Actions* ❯ *Reset Submit* ▌.
    ○ *Reset Output Status* - The action resets the output status (confirmation issue status). The approval status remains as *Approved* or *Approval Not Necessary*.

    > **i Note**
    >
    > The *Submit* action generates a new output document without the need for an additional approval process.

7.1.23 Configure Sales Quote Approver Determination

As an administrator, learn how to edit the sales quote approval process.

Administrators can perform advanced quote approval process modifications. You can edit or add steps, change the order of existing approval steps, and define approver conditions. Navigate to ▌▶ *Administrator* ❯ *Approval Processes: Sales Quote* ❯ *Work Distribution* ❯ *Customer Defined Involved Party* ▌ or *Customer Defined Territory Owner*.

Follow the steps to finalize the advanced sales quote approver determination:

1. Navigate to the fine-tuning activity *Party Role Definition*. Create a new party role and assign party category *Approver*.
2. Navigate to the fine-tuning activity *Involved Parties for Sales Quotes*. Add the role to the sales quotes involved parties.

    > **i Note**
    >
    > You can also define determination for the standard party role *Approver*.

3. Add a new determination step *User Rules* for *<z-party>* for the newly created party.
4. Continue by navigation to ▌▶ *Administrator* ❯ *Sales and Marketing Settings* ❯ *Define Rules for Sales Quote Parties* ▌.
5. Finally, navigate to ▌▶ *Administrator* ❯ *Approval Processes* ▌ to add the work distribution *Customer Defined Involved Party* to the sales quote approval process.

Related Information

7.1.24 Configure Rule to Revoke Quotes with In Approval Status

If for example, a custom defined time period is exceeded, administrators can create a rule to revoke sales quotes with status *In Approval* to *Not Started.*

Administrators can create a rule by defining the *Rule Type* action *Reset Submit.*

> → Remember
>
> As of the February 2018 release, only approval status *Approval Not Necessary* and *Approved* are supported for revocation.

7.1.25 Block External Follow-up Documents for Prospects

As an administrator, learn how to disable external follow-up documents for prospects.

To block external follow-up documents for prospects, disable the action *Create External Follow-up Document* in SAP ERP. This action means prospects won't receive follow-up documents.

Go to ▶ *Business Configuration* ▶ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Communication and Information Exchange* ▶ *Integration with External Applications and Solutions* ▶ *Integration with SAP ERP* ▶ and select the scoping question: *Do you want to block prospects created in your cloud solution from being replicated to your SAP ERP solution?*

7.1.26 Enable Display Determination Method for Involved Parties

Administrators can learn how to analyze sales quote party determination or re-determination.

This enablement makes party and re-determination more transparent for administrators.

Navigate to the personalize or adapt mode. From the *Involved Parties* tab of sales quotes, add the *Determination Method* field.

> **i** Note
>
> If the determination is copied or created as follow-up once accounts are changed, you manually enter the party role *Account*.

7.1.27 Modify Error Message Severity

Administrators can change the minimum order quantity error message to a warning message. Additional messages that be can be changed, for example, messages for matching sales unit with sales organizations.

This action is useful when SAP ERP customizing is less restrictive and your default minimum order quantity is a recommended level.

> **! Restriction**
>
> This feature is currently not available for offline processing.

1. Navigate to ▶ *Fine-Tune* ❯ *Sales Quotes* ▶.
2. Select *Message Severity Configuration*.
3. Select the desired severity.
4. Save your entries.

7.1.28 Modify Warning Message for Multiple Sales Areas

Suppress the warning message that the application displays when multiple sales areas are assigned.

To suppress the warning message - *Multiple sales areas exist, Please Check the Default* define the necessary configuration under ▶ *Business Configuration* ❯ *Implementation Projects* ▶. Select your project and navigate to ▶ *Open Activity List* ❯ *Sales Quotes* ❯ *Message Severity Configuration* ▶.

> **i Note**
>
> You will need the above feature only if you have scoped combined sales area determination. Go to
> ▶ *Business Configuration* ❯ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project
> Scope* ❯ *Questions* ❯ *Sales* ❯ *New Business* ❯ *Sales Quotes* ❯ *Sales Area Determination for Sales Quotes* ▶
> and select the scoping question: *Do you want to enable users to default and specify, per sales quote, a
> predetermined combination of sales org., distribution channel and division?*.

7.1.29 Enable Sales Quote Signatures

Administrators can capture and attach graphical signatures to sales quotes.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project
Scope* ❯ *Questions* ❯ *Sales* ❯ *New Business* ❯ *Sales Quotes* ❯ *Graphical Signature for Sales Quotes* ▶ and select
the scoping question: *Do you want to capture and attach a graphical signature to the Sales Quote (Valid for
touch enabled devices only)?*

> **i Note**
>
> Graphical signatures are only valid on touch enables devices.

You can capture signatures from your customers or prospects as confirmation of a sales quote under
▶ *Actions* 〉 *Sign* 〉. In the *Add Signature* dialog, add a signature in the box.

Once you add a signature, it is available as an attachment in the sales quote. After you saved a signature, the *Sign* option under *Actions* is disabled.

7.1.30 Enable Formatted Text

Administrators can enable the use of formatted texts for notes in sales quotes.

Configure the use of external and internal notes by navigating to ▶ *Business Configuration* 〉 *Scoping Element: Sales* 〉 *New Business* 〉 *Questions* 〉 *Sales Quotes: Do you want use formatted texts for Sales Quotes?* 〉

Once the scoping is complete, users can enter and edit standard notes on header and item (Internal and External Note).

If you're using the sales quote form template *Sales Quote Demo*, then the formatted texts are included when printing.

> **i Note**
>
> To enable formatted texts in other quote form templates, switch the data type from plain text to rich text in Adobe® Livecycle® Designer.

7.1.31 Configure Output Form

As an administrator, explore how to use the integrated Adobe® LiveCycle® Designer to make advanced changes to sales quote form templates.

Procedure

1. Go to ▶ *Administrator* 〉 *Form Template Maintenance* 〉.

   > **i Note**
   >
   > Adapt general changes on the output form from the master template in *Master Template Maintenance*.

2. Select the form template variant you want to edit and choose ▶ *Open* 〉 *Adobe LiveCycle Designer* 〉.
3. Make your changes.
4. Preview your changes using historical data or sample data.
5. Click *Save*.
6. Click *Publish* to finalize your entries.

7.1.32 Configure Attachment of Product Images to Sales Quote Output Forms

Administrators can scope output forms so users can add images to sales quote output forms.

Go to ❯ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ❯ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *New Business* ❯ *Communication for New Business* ❯ and select the scoping question: *Do you want to add product images to the Sales Quote form template?*

> **i** Note
>
> When users add product images to form output messages, system performance is influenced.

7.1.33 Configure Sales Quote Output and Channel Determination

As administrator, learn about default sales quote form templates or output channels by sales organizations.

Adapt the columns to make a new selection of attributes visible in this table. Navigate out of the screen and return to it to see the changes.

7.1.34 Configure Bi-directional Exchange with SAP ERP

Administrators can replicate sales quotes bi-directionally with SAP ERP.

Go to ❯ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ❯ *Edit Project Scope* ❯ *Questions* ❯ *Communication and Information Exchange* ❯ *Integration with External Applications and Solutions* ❯ *Integration into Sales, Service, and Marketing Processes* ❯ *Sales Quotes* ❯. Ensure that there is a checkmark for the following questions:

- *Do you want to replicate sales quotes from an external application or solution to your cloud solution?*
- *Do you want to replicate sales quotes from you cloud solution to an external application or solution?*

Additionally, complete the fine-tune activity ❯ *Sales Quotes* ❯ *Document Types* ❯.

Add a row and enter the required details, keeping in mind the following important fields:

- *Direct Customer Acceptance*: When this option is selected, the system transfers sales quotes using the *Submit* action from your cloud solution to an SAP ERP system. It also allows users to edit replicated sales quotes created in your *SAP ERP* cloud solution.
- *Replication*: By choosing this option, the sales quote output, document submission is be disabled. (Configuration is also enabled using the *Replication* flag).

7.1.35 Use Sales Quote Extensibility

Administrators can extend sales quotes with your own fields for business objects such as items and involved parties.

Item Level Extension Fields - Administrators can cluster extension fields on product item in an separate section below the product table. From sales quote business object to ▶ *Adapt* ❯ *Product* ❯ *Add Section* ❯ *Customer Extensions* ◀.

Involved Party Fields - Administrators can define extension fields for the sales quote *Involved Parties* tab. These fields belong to the `Quote-Party-MDAV-CODCQTPTYB`.

Account Sales Data to Sales Quote Header - Administrators can define the account sales data extension fields flows to sales quote or sales order header.

7.1.36 Enable Cross, Up, and Down Selling

As an administrator, you can create product lists of the Cross/Up/Down Selling type to enable users to select from those products in a sales quote.

1. Go to ▶ *Products* ❯ *Product Lists* ❯ *New* ◀.
2. Choose from either the *Personalize* or the *Adapt* menu to modify the screen layout.
3. Add the *Type* field to the *New Product List* box and save your changes.
4. Create a new product list and select *Cross/Up/Down Selling*.
5. Go to the *Required Products* tab and add the reference products.
6. Go to the *Proposed Products* tab to add products and select their types as either cross, up, or down selling and save your product list.
   Any time a sales quote includes one of the required products from the list, the associated proposed products are available for cross, up, or down selling, depending on their type in the product list.
   - Cross selling: results in a list of recommended products in the sales quote that the user can add directly to the quote.
   - Up or down selling: results in an icon in the products list of a sales quote to indicate that the user can replace the product, to up or down sell, from *Actions*.

Related Information

Product Lists [page 874]

7.1.37 Configure Reasons for Rejection

Administrators can learn how to configure reasons for rejection. The codes are used in documents such as quotes, orders, or contracts to define the reasons for rejection.

You define rejection reasons to describe why a document or item has been canceled.

1. To quickly navigate to the fine-tuning activity, go to ▶ *Business Configuration* ❯ *Overview* ❯ *Activities* ❯ *Search* ◀ and type *Reasons for Rejection*.
2. Click *Add Row*.
3. Enter the desired *Rejection Reason Code*.

> **i** Note
>
> When adding your own entries, the data you enter into field *Rejection Reason Code* must begin with the letter **Z**.

4. Enter the desired description.
5. Save your entries and set the desired status.

Users can cancel sales quotes on header and on item level. When canceled on header level, the rejection reason is copied over to the items.

> **i** Note
>
> Sales quotes canceled on header level cancels all of its items.

7.1.38   Configure S/MIME for E-Mail Notifications

Administrators can upload certificates needed for e-mail notifications for all employees.

Context

To enable e-mail notifications, upload the CA certificates in this area for the e-mail address for generic business task management for all involved employees and managers.

Procedure

1. Choose ▶ *Administrator* ❯ *Common Tasks* ❯ *Configure S/MIME* ◀.
2. On the *Incoming E-Mail* tab, upload the CA certificates from all involved employees for the generic incoming e-mail address *Business Task Management Email Notifications*.
3. On the *Outgoing E-Mail* tab, install the system CA certificate in the e-mail client of the involved employee as follows:

    a. In the *SAP Trust Center Service* column, click *Link to SAP CA* to open the *SAP Trust Center Service*.

    b. On the *Root Certificates* section of the screen, click *SAP Passport CA Certificate*. A popup opens.

    c. Click *Install Certificate...* and follow the wizard by clicking *Next >*.

    d. Select *Place all certificate in the following store* and click *Browse....*

    e. Select *Trusted Root Certification Authorities* and click *OK* and then *Next >*.

    Now the CA certificate from the system is installed locally.

4. Now activate the S/MIME on the *Activate S/MIME* tab select the options for *Check Signature of Incoming E-Mails*, *Encrypt Outgoing E-Mails* (optional), and *Signing Outgoing E-Mails*.

7.1.39 Configure Rich Text Format for Sales Quote Output E-Mails

Administrator can configure rich text format for sales quote output e-mails. This reduces the effort on e-mail editing.

1. Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▌ and select your project.

2. Click ▌▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *New Business* ❯ *Communication for New Business* ▌ and select the scoping question: *Do you want to use formatted text for sales quote output email body?*

7.1.40 Configure E-Mail and Fax Settings for E-Mail Notifications

Administrators need to specifiy the company domain for e-mail notifications.

Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Open Activity List* ❯ *Fine-Tune* ❯ *E-Mail and Fax Settings* ▌.

Enter your company domain, such as `example.com`, as the *Allowed Sender E-Mail Domain*.

7.1.41 Configure Sales Order Approval Via E-Mail

Administrators can configure sales order approval via e-mail with scoping activities.

Before using approval via e-mail, ensure the following:

- The involved employees are business users and have valid e-mail addresses, and that the CA certificates from the employees are uploaded to the system for outgoing e-mails.
- The involved employee are subscribed to the e-mail notifications by opening the *Notifications* view and choosing *Subscribe to E-Mail*.
- The e-mail clients of the involved employees have enabled the receipt of encrypted e-mails.

Go to ▸| *Business Configuration* ❯ *Implementation Projects* |❯. Select your project and navigate to ▸| *Edit Project Scope* ❯ *Questions* ❯ *Built-in Services and Support* ❯ *System Management* ❯ *Security* |❯ and check the box for the encryption and signatures in e-mail question.

Scoping Questions for Enabling Automatic Approval Processes

Business Object	Navigation in System	Scoping Question
Campaigns	▸| *Sales Campaign* ❯ *Campaign Management* ❯ *Campaign Execution* |❯	`Do you want to use a multi-step approval process for campaigns?`
Opportunities	▸| *Sales* ❯ *New Business* ❯ *Opportunities* |❯	`Do you want to use a multistep approval process for opportunities?`
		`Do you want the system to automatically submit an opportunity for approval?` **i Note** This question is optional and only relevant if you want trigger automatically an approval for your opportunities if the entered data fulfill the defined criteria.
Sales Quotes	▸| *Sales* ❯ *New Business* ❯ *Sales Quotes* |❯	`Do you want to use a multi-step approval process for sales quotes?`
Tickets	▸| *Service* ❯ *Customer Care* ❯ *Service Request Management* |❯	`Do you want to use a multi-step approval for tickets?`
		`Do you want to automatically submit tickets for an approval workflow after one or more specified conditions are fulfilled?`
	▸| *Service* ❯ *Employee support* ❯ *Ticket Management* |❯	`Do you want to use a multi-step approval for tickets?`

Business Object	Navigation in System	Scoping Question
		Do you want that the system submits automatically a ticket for approval?
		i Note This question is optional and only relevant if you want trigger automatically an approval for your tickets if the entered data fulfill the defined criteria.
Contracts	▶ *Service* ❭ *Entitlement Management* ❭ *Service Contract Management* ❭	Do you want to use a multi-step approval for service contracts?
E-mail Notifications - E-mail encryption and signature	▶ *Build-in Services and Support* ❭ *System Management* ❭ *Security* ❭	Do you want to use encryption and signature for e-mails?

7.1.42 Configure Net and Gross Weight, Total Volume for Sales Quote Header

Administrators can configure the fine-tune activity and decide to display the item weight, total weight, and volume for sales quote item types or hide them.

Go to ▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Sales Quotes* ❭ *Item Types* ❭ *Maintain Item Types* ❭ place a check mark in the *Not Relevant for Weight Calculation* box.

By placing a check mark in the *Not Relevant for Weight Calculation* item type field, the item is not relevant for weight (and volume) calculation. If the base item type is already not weight relevant, the system disables the option.

> **→ Remember**
>
> The corresponding SAP ERP customizing field must match your choice.

7.1.43 Configure Survey and Task Assignments for Sales Quotes

You can automatically assign surveys and tasks to sales quotes from an activity plan by defining *Workflow Rules*.

As an administrator, you can assign survey and task assignment workflow rules using the following actions provided under the gear icon in the *Workflow Rules* work center tab by defining workflow rules.

1. Go to ▶ *Administrator* ▶ *Workflow Rules* ▶ and create or open an existing rule.
2. Click *Define Conditions* according to your needs.
3. From *Define Actions*, select ▶ *Rule Type* ▶ *Action* ▶.
4. Under *Select Action* choose *Refresh from Activity Plan* to automatically assign tasks and surveys from relevant activity plans.

7.1.44 Configure Sales Contract as Follow-up to a Sales Quote

Administrators must adjust by following the sales quote document types to enable a sales contract as follow-up to the quote scenario.

Go to ▶ *Business Configuration* ▶ *Implementation Projects* ▶. Select your project and navigate to ▶ *Open Activity List* ▶ *Fine-Tune* ▶ *Sales Quotes* ▶ *Document Types* ▶ and ensure the *Replication* column is blank. This ensures the sales contract as follow-up quote is not integration relevant.

> **i Note**
>
> It is a prerequisite that a quote used in a sales contract as follow-up scenario is not integration relevant.

> **i Note**
>
> Sales contract as follow-up to quote is not supported if you sell a template-based service contract, for example, an extended warranty together with a product as a package.

> **i Note**
>
> Product items in the quote which are not associated with items of an existing sales contract could be used for sales order set-up and or the creation of new sales contracts.

> **i Note**
>
> Associating the quote to sales orders and contract are listed in *Sales Documents* tab for orders and contracts.

7.1.45 Configure Sales Quote Creation in Full Create Mode

Administrators can configure settings to create sales quotes in full create mode. This allows you to skip a few additional UI steps required when creating in the quick create mode.

Select the checkbox *Create Sales Quotes* in detail view under ▷ *Administrator* ❭ *Sales and Campaign Settings* ❭ *Sales Quotes* ❭ *Confiugre Sales Quote related options* ❭ *Sales Quote Configuration* ❭.

> ! Restriction
>
> There is a limitation in this release. If you create sales quotes in offline mode, you need to ensure that this configuration is deactivated.

> i Note
>
> Product proposals automatically created from *Product Lists* have to be removed by the user in case no proposed quantity has been maintained in the *Product List*. Users can use the action *Remove Zero-Quantity Items.*

7.1.46 Configure Quote Line Deletion after Customer Submittal

Administrators can configure quote line item deletion after the quote is submitted to the customer.

Go to ▷ *Fine-tune* ❭ *Sales Quote* ❭ *Message Severity* ❭ and modify the column to your business needs.

Normally, quotes submitted to customers cannot be deleted, with this configuration, users will be able to delete quote items for quotes that have already been submitted to the customer.

7.1.47 Configure Stock Information Update for Product

Administrators must scope the feature before you can use it.

To view stock information from SAP S/4HANA, follow these steps:

1. Navigate to ▷ *Business Configuration* ❭ *Implementation Projects* ❭ and select your project.
2. Go to ▷ *Edit Project Scope* ❭ *Questions* ❭ *Communication and Information Exchange* ❭ *Integration with External Applications and Solutions* ❭ *Integration of Master Data* ❭ and select following scoping question: *Do you want to receive stock information from an external application?*

7.1.48 Fine-tune Custom Party Roles on the UI

Administrators can assign up to three custom party roles on the UI.

Go to fine-tuning activity ▶ *Sales Quotes* ❯ *Involved Parties* ❯ *Assign Party to UI* ❘ and assign up to three roles.

7.1.49 Define Workflow Rule to Update Opportunity Custom Statuses

Administrators can define workflow rules that update opportunity custom statuses and reasons based on sales quote conditions.

This feature allows you for example, to set an opportunity to *Won*, if the related primary sales quote turns to *Won*.

> **! Restriction**
>
> Custom values with the same descriptions cannot be distinguished in the workflow rule definition.

7.1.50 Configure Cloud for Customer Sales Quotes for CLM Integration

Depending on the selected document type, administrators can integrate CLM directly to SAP Cloud for Customer sales quotes.

> **i Note**
>
> This feature is available as a beta version. To use this feature and add CLM to your scope, create a ticket or contact your SAP representative.

1. Go to the ▶ *Business Configuration* ❯ *Implementation Projects* ❘.
2. Select the current project and click *Open Activity List*.
3. Go to ▶ *Fine-Tune* ❯ *Activity: Sales Quotes* ❯ *Maintain Document Types* ❯ *Sales Quote with CLM* ❘ and modify the options accordingly.
4. Add the *Contracts* work center to your scope.
5. Assign the *CLM Administration* view to the key user's business role.

> **→ Remember**
>
> Configure CLM to support features such templates, digital signatures, approvals, terms and conditions, and negotiations (internal and external customer).

> **i Note**
>
> The August 2019 release contains limitations in functionality, they include:

- Missing language support (usage of customer language instead log on language).
- Missing template determination.
- Inability to modify or delete templates during the CLM process.
- No display of detailed item information in tables.
- No communication to individual customers.

For more information on Callidus CLM, see https://docs.calliduscloud.com/articles/#!contract-lifecycle-management-publication/c4c-integration ⤤ .

7.1.51 Enable Price Modifications for Sub-Items of a Bill-of-Material

Administrators can learn how to enable price modifications for sub-Items of a bill-of-material.

To enable this feature, go to ▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▶ *Edit Project Scope* ❭ *Questions* ❭ *Communication and Information Exchange* ❭ *Integration with External Applications and Solutions* ❭ *Integration into Sales, Service, and Marketing Processes* ❭ *Sales Quotes* ❭ and select the scoping question: *Do you want to change sub-items that are determined in an external application?*

7.2   Create Sales Quotes

Learn how to create sales quotes to indicate to your customers the prices of the products and services your company offers.

As a sales representative or sales team member, you'll create quotes from an existing opportunity, which could include the product quantities and discounts. Once you create the quote, you can then share the quote details with your team so they are up-to-date with the progress of the negotiation.

Create a Sales Quote [page 454]
    Learn to create sales quotes in the solution.

Create Sales Quotes from Sales Orders [page 458]
    Users can create follow-up sales quotes directly from the sales order, which references the sales quote including the sales order items to a sales quote.

Create and Assign New Primary Contacts in Quotes [page 458]
    From a sales quote, you can go to the *Contacts* value help to create and assign a new primary contact. No configuration is necessary to view the action *New Contact*.

Create Sales Quotes from a Contact Person [page 458]
    Users can create sales quotes directly from the quote contact person detailed section.

Create Follow-Up Sales Contract from Sales Quotes [page 458]
    You can create a follow-up contract directly from a sales quote.

Search for Sales Quotes [page 459]

Use *Basic* and *Advanced Filter* to query quote fields.

Modify Sales Contract Types Using the Data Workbench [page 459]
> Administrators can use the *Data Workbench* to modify sales contract types even after they are created.

Create Follow-Up Sales Contract from a Sales Quote [page 459]
> You can create a follow-up contract directly from a sales quote.

Create Follow-up Orders from Cloud for Customer to SAP ERP Bi-directional Integrated Quotes [page 460]
> You can trigger follow-up SAP ERP sales orders from a bi-directional integrated sales quote directly from SAP Cloud for Customer.

7.2.1 Create a Sales Quote

Learn to create sales quotes in the solution.

1. Open an existing opportunity or navigate to *Sales Quote* on the SAP Fiori Client to create a new one by selecting the plus sign (+).

   > **i Note**
   >
   > When converting opportunities to sales quotes, many details such as accounts and products from the opportunity are copied over to the new sales quote

2. Add data to the required or desired fields.
3. Add line items and quantities by selecting *Add* from the sales quote *Products* tab.
4. Save your entries.

   > **i Note**
   >
   > The sales quote is created with status *Open* and products without any entered quantities are not listed in the quote.

5. Select ▷ *Actions* ▷ *Submit* ▷ to trigger further processing, for example, sending it using fax, e-mail, or printing it for sending it using a postal service.

   > **i Note**
   >
   > If an approval is required, the output starts as soon as the quote has been approved.

6. To preview the sales quote, select ▷ *Actions* ▷ *Preview* ▷ and a window opens with the quote PDF document.
   Click *Refresh* to update the complete sales quote data. This action is useful when bi-directional replication requires an immediate update or when the user receives error messages requiring a sales quote refresh to continue.

> **⚠ Caution**
>
> You will notice a decreased system performance when working with sales quotes or sales orders exceeding 500 products. Adding products to the sales document affects the performance of all item-related functions, such as pricing, output, or transfer to external systems.

7.2.1.1 Configure Access Control for Sales Quotes

Administrators can learn how to configure user access to sales quotes.

Administrators restrict read and write access to sales quotes by navigating to ▐▶ *Business Roles* ❭ *Access Restrictions* ❭ *Access Context 1015* ❭.

> → Tip
>
> Select a *Restriction Rule* to view a brief summary of the rule.

7.2.1.2 Configure Block Assignment

Administrators can set up block reasons for document types. The block assignments allow you to stop the creation of sales quotes, sales orders, or other transactions for certain accounts considering their sales area.

Procedure

1. Go to ▐▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▐▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Accounts* ❭.
2. Select *Sales Document Order Block*.
3. Add a row for each order block reason you want to use to block sales documents and select from the list of document types.
4. Define the following:
   - *Order Block Reason*: Reasons that you would like to use to block sales order creation for accounts

     > i Note
     >
     > The blocking reasons that you maintain here are mapped to the blocking reasons configured in an ERP system.

   - *Document Type*: Assign a document type to the order block reasons to enable blocking sales order creation for accounts.
5. Assign the blocks to accounts and block them in the header section of accounts.

7.2.1.3 Configure Default Requested Date

As an administrator, learn how to configure the default requested date.

Define the sales quote default requested date, which is available in the header area.

Configure quote validity and requested dates by navigating to the fine-tuning activity ▐▶ *Date Profiles* ❭ *Date Variable for Sales* ❭ *Sales Quotes* ❭.

Highlight the desired document type and select the desired logic type from the pricing date dropdown field.

> **i Note**
>
> The requested date on header is copied to requested date on items. Manually changed dates on items are not overwritten by the header date.

7.2.1.4   Configure Number Ranges

Administrators need to configure number ranges to define the range of numbers assigned to sales quotes.

1. To quickly navigate to the fine-tuning activity, go to ▐▶ *Business Configuration* ❯ *Overview* ❯ *Activities* ❯ *Search* ▐ and type *Number Ranges*.
2. Click *Maintain Number Range*.
3. On the following screen, review the default begin and end number that applies to sales quotes in the solution.
4. If you wish to define a different number range, choose *Change Current Number*.
5. On the following screen, enter the new current number, then click *Save and Close*.
6. Click *Save and Close* again.

7.2.1.5   Configure Sales Contract as Follow-up to a Sales Quote

Administrators must adjust by following the sales quote document types to enable a sales contract as follow-up to the quote scenario.

Go to ▐▶ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▐▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Sales Quotes* ❯ *Document Types* ▐ and ensure the *Replication* column is blank. This ensures the sales contract as follow-up quote is not integration relevant.

> **i Note**
>
> It is a prerequisite that a quote used in a sales contract as follow-up scenario is not integration relevant.

> **i Note**
>
> Sales contract as follow-up to quote is not supported if you sell a template-based service contract, for example, an extended warranty together with a product as a package.

> **i Note**
>
> Product items in the quote which are not associated with items of an existing sales contract could be used for sales order set-up and or the creation of new sales contracts.

> **i Note**
>
> Associating the quote to sales orders and contract are listed in *Sales Documents* tab for orders and contracts.

7.2.1.6 Configure Sales Quote Creation in Full Create Mode

Administrators can configure settings to create sales quotes in full create mode. This allows you to skip a few additional UI steps required when creating in the quick create mode.

Select the checkbox *Create Sales Quotes* in detail view under ▌▶ *Administrator* ❯ *Sales and Campaign Settings* ❯ *Sales Quotes* ❯ *Confiugre Sales Quote related options* ❯ *Sales Quote Configuration* ❱ .

> **! Restriction**
>
> There is a limitation in this release. If you create sales quotes in offline mode, you need to ensure that this configuration is deactivated.

> **i Note**
>
> Product proposals automatically created from *Product Lists* have to be removed by the user in case no proposed quantity has been maintained in the *Product List*. Users can use the action *Remove Zero-Quantity Items.*

7.2.1.7 Enable External Follow-up Document for Bi-directional Integrated Quotes

Administrators can enable the action *Create External Follow-up Document* for sales quotes that are integrated bi-directionally.

Go to business area ▌▶ *Communication and Information Exchange* ❯ *Integration with External Applications and Solutions* ❯ *Integration into Sales, Service, and Marketing Process* ❱ . Mark the question *Do you want to create follow-up documents from sales quotes via your cloud solution to an external application?* and the action is enabled.

> **i Note**
>
> Ensure that you configure the relevant communication arrangement *Create Follow-up Sales Order for Replicated Sales Quote* located in the SAP Business Suite.

7.2.2 Create Sales Quotes from Sales Orders

Users can create follow-up sales quotes directly from the sales order, which references the sales quote including the sales order items to a sales quote.

To use the feature, go to adapt or personalize. Add the hidden tab *Sales Documents* to the detailed tab of the sales order.

7.2.3 Create and Assign New Primary Contacts in Quotes

From a sales quote, you can go to the *Contacts* value help to create and assign a new primary contact. No configuration is necessary to view the action *New Contact*.

7.2.4 Create Sales Quotes from a Contact Person

Users can create sales quotes directly from the quote contact person detailed section.

To create sales quotes from a contact person, users must assign the *Contact* to the *Account*.

When you create sales quotes from a contact person, it defaults the *Contact* as *Primary Contact* and the related account to the new sales quote.

> **i Note**
>
> The *Advanced Search* supports *ID* and *External ID* (hidden field) queries and is also applicable in the *Accounts* sales quote tab.

7.2.5 Create Follow-Up Sales Contract from Sales Quotes

You can create a follow-up contract directly from a sales quote.

From a sales quote, go to the *Contracts* tab and click *New*. The status of the follow-up quote changes to *Won* after the contract is created.

> **i Note**
>
> To view and use this functionality, from *Sales Quotes*, go to *Personalization* and add the hidden section *Contracts* to the *Sales Document* tab. You can also add the header quote field *Requested End Date*. This field represents the contract validity together with the *Requested* (Start) *Date*.

7.2.6 Search for Sales Quotes

Use *Basic* and *Advanced Filter* to query quote fields.

The following fields are supported when using the *Basic* search for sales quotes:

- *Sales Quote ID*
- *Description*
- *Product ID*
- *Party ID* (for all parties)
- *Party* (Formatted name for all parties)
- *Primary Contact ID*
- Sales Quote *External ID*

You can also use the *Advanced Filter* search which displays a comprehensive list of fields to narrow your sales quote search.

1. Click *Show Advanced Filter*.

   > **i Note**
   >
   > The *General* section contains an extensive list of fields you may not have available.

2. Save your entries and exit from the personalization or adapt mode.
3. In the desired sections, enter the search query field data.
4. Click *Go* to view the search results.

   > **i Note**
   >
   > Click *Save* or *Organize Queries* to save time for the next search query.

5. Click *Hide Advanced Filter* to return to the list tab.

7.2.7 Modify Sales Contract Types Using the Data Workbench

Administrators can use the *Data Workbench* to modify sales contract types even after they are created.

1. Navigate to the *Data Workbench*.
2. Export contracts.
3. Modify the contract type.
4. Update contracts in the *Data Workbench*.

7.2.8 Create Follow-Up Sales Contract from a Sales Quote

You can create a follow-up contract directly from a sales quote.

From a sales quote, go to the *Contracts* tab and click *New*. The status of the follow-up quote changes to *Won* after the contract is created.

> **i Note**
>
> To view and use this functionality, from *Sales Quotes*, go to *Personalization* and add the hidden section *Contracts* to the *Sales Document* tab. You can also add the header quote field *Requested End Date*. This field represents the contract validity together with the *Requested* (Start) *Date*.

7.2.9 Create Follow-up Orders from Cloud for Customer to SAP ERP Bi-directional Integrated Quotes

You can trigger follow-up SAP ERP sales orders from a bi-directional integrated sales quote directly from SAP Cloud for Customer.

Since orders are directly created as follow-up in SAP ERP system, this feature allows you to consider product reservations made in SAP ERP quote or special price conditions. The details are copied to follow-up sales order.

Create multiple follow-up sales orders in SAP ERP before the reference status is set to *Finish*.

7.3 Maintain Sales Quotes

Explore how to add products to sales quotes, use cross-up-down sell, assign opportunities, work with involved parties, and more.

Add Products to a Sales Quote [page 461]
    Select products to add to your sales quotes based on previous quotes, orders, and product proposals.

Edit Sales Quotes in Worklist [page 462]
    You can edit multiple sales quotes directly in the list, which saves your effort in going to the detail view of each sales quote to make changes.

Copy Line Item [page 462]
    Learn how to copy line items.

Set a Minimum Item Order Quantity [page 463]
    Set a minimum quantity for items in sales orders or sales quotes.

Minimum Order Quantity Error Message [page 463]
    Learn about the minimum order quantity error message.

Use Item Types [page 464]
    Explore how to work with item types in sales transactions such as follow-up documents.

Calculate Quantity [page 466]
    Use the calculate quantity action to create a summary of the number of items for each unit of measure.

Display Net and Gross Weight, Total Volume in Sales Quote Header [page 466]
    You can view the calculated net and gross weight, as well as volume data in sales quotes when your administrator configures them in the product master.

Add Quick Products from Product Lists to Sales Quotes [page 467]

Learn how to quickly add products and related quantities to sales quotes or sales orders using the action *Product Lists*.

You can view stock information for products synchronized from SAP S/4HANA.

Learn how the solution uses cross selling to display proposed products to users when creating sales transactions.

Learn about adding and using customer part numbers in quotes.

You can use text items that allows you to define and structure subitems. If you only enter a product description in its corresponding field without an adding a product ID, the item is treated as a text item. In addition, the item number can be edited.

Learn how to assign an opportunity to a sales quote.

Assign opportunities to external sales quotes.

Display the *External Product ID* popup selection for *Cross/Up/Down Selling* or the *Recommended Products* view. To add the *External Product ID* field, go to *Adapt* or *Personalization*.

Determine involved parties for sales quotes using party roles and the applicable determination rules, which allow you to streamline team assignments. In addition, it ensures that business partners are correctly assigned to business documents in accordance with your company needs.

You can copy items from Excel using the copy and paste function in the product table.

Users can disable the copy and paste function allowing you to quickly paste products to a sales quote in the product table. To disable the function, go to ▶ *Adaptation* 〉 *Sales Quotes* 〉 *Products* ▮ deselect *Copy&Paste.*

The depersonalization function allows users to remove personal data from a business object, such as sales contracts, to ensure compliance with the applicable data protection requirements.

7.3.1 Add Products to a Sales Quote

Select products to add to your sales quotes based on previous quotes, orders, and product proposals.

When users create quotes and add products, the sales price defaults to the product list price. Depending on your permissions, you can edit the product line item prices and discounts.

Related Information

Add Quick Products from Product Lists to Sales Quotes [page 467]
Create Sales Quotes [page 453]

7.3.2 Edit Sales Quotes in Worklist

You can edit multiple sales quotes directly in the list, which saves your effort in going to the detail view of each sales quote to make changes.

From Fiori Client navigate to ▶ *Key User* 〉 *Settings* 〉 *Company Setting* 〉 *Enable Editing in Dataset in Fiori Client.* ▶

Once the feature is enabled, you can click the pencil icon in the upper right corner to switch to the edit mode.

Users can filter the worklist that needs to be changed and directly change data in the work list without navigating to the detailed view.

> **i Note**
>
> This feature is not enabled in offline mode.

> **i Note**
>
> If you use bi-directional quote integration with synchronous pricing, save is not allowed, if change is price relevant.

7.3.3 Copy Line Item

Learn how to copy line items.

Procedure

1. Create a new sales quote and add line items or open an existing one with line items.
2. Select the *Products* tab.
3. Select the line item you want to copy.
4. Click *Actions*.
5. Select *Copy*.

   When sales quote line items are copied, a new line item number is assigned. The item details as well as the item's notes and attachments are also duplicated.

7.3.3.1 Modify Error Message Severity

Administrators can change the minimum order quantity error message to a warning message. Additional messages that be can be changed, for example, messages for matching sales unit with sales organizations.

This action is useful when SAP ERP customizing is less restrictive and your default minimum order quantity is a recommended level.

> ! Restriction
>
> This feature is currently not available for offline processing.

1. Navigate to ▌▶ *Fine-Tune* ▶ *Sales Quotes* ▐.
2. Select *Message Severity Configuration*.
3. Select the desired severity.
4. Save your entries.

7.3.4 Set a Minimum Item Order Quantity

Set a minimum quantity for items in sales orders or sales quotes.

If you've set a minimum order quantity for a product, the system validates the quantity and displays an error message if the minimum quantity hasn't been met. For products with multiple units of measure, you can set a quantity conversion to ensure that the minimum order quantity check is still valid for each unit of measure.

If your company has defined a minimal order quantity for sales quotes, an error message is displayed. The message will state the minimum quantity of products required to proceed with the sales quote processing. To override the message, in the quantity field of the line item, enter the minimum amount and save your entries.

> i Note
>
> Sales quote minimum order quantity applies to sales quotes created online or offline.

Administrators can maintain the minimum order quantity in product master sales data dependent.

7.3.5 Minimum Order Quantity Error Message

Learn about the minimum order quantity error message.

If your company has defined a minimal order quantity for sales quotes, an error message is displayed. The message will state the minimum quantity of products required to proceed with the sales quote processing. To override the message, in the quantity field of the line item, enter the minimum amount and save your entries.

> i Note
>
> Sales quote minimum order quantity applies to sales quotes created online or offline.

Administrators can maintain the minimum order quantity in product master sales data dependent.

7.3.6 Use Item Types

Explore how to work with item types in sales transactions such as follow-up documents.

Your administrator has configured item types to determine how an item category behaves in a sales document.

> **i Note**
>
> You may need to add the *Item Type* field using *Personalize* or *Adapt* from the sales quote *Product* tab.

> **i Note**
>
> You can use code list restrictions to filter item types based on a document type.

Complete the fine-tuning configuration activity for ▶ *Sales Quotes* ❯ *Item Types* ❯.

> **i Note**
>
> This activity is similar to the configuration activity for sales orders. The difference is that each are completed separately as the values are not copied from one to the other.

You can also define code list restrictions, to filter the available item types based on document type. Add the *Item Type* field to the *Products* tab for sales quotes from adaptation or personalization.

7.3.6.1   Define Item Types

Administrators can explore and learn how to define item types.

Item types determine how an item category behaves in a sales document. Item item types are not necessary, but are relevant if you replicate quotes with an on premise system and administrators should remember to configure document types.

You can define alternative item types for the item types delivered in the standard solution. These alternative item types are then displayed for the corresponding items under the *Products* tab for sales orders. You can use these custom item types to process items based on SAP ERP item categories. You can also use item types for, in order simulations to retrieve external pricing.

Define your own item types to reflect your company practices:

1. To quickly navigate to the fine-tuning activity, go to ▶ *Business Configuration* ❯ *Overview* ❯ *Sort by: Activities* ❯ *Search* ❯ and type *Sales Quotes*.
2. Click ▶ *Sales Quotes* ❯ *Item Types* ❯ *Maintain Item Types* ❯.
3. Click *Add Row*.
4. Enter the desired details and save your entries.

> **i Note**
>
> If you want to define an item as a free sample or free good that should not affect pricing, flag it as *Not Relevant for Pricing*. When an item that is not relevant for pricing is added to a quote, it will not contain a price. However, you can still add a price for this product manually.

7.3.6.2 Define Item Type as Not Pricing Relevant

Administrators can define items as a free sample or free good so that pricing is not affected.

You can define item types as not pricing relevant. The activity allows users to only add the item type to the item without setting the price to zero or a 100% discount. For example, a product is added to quote as a free good or sample.

1. To quickly navigate to the fine-tuning activity, go to ▌ *Business Configuration* ❭ *Overview* ❭ *Activities* ❭ *Search* ❭ and type *Sales Quotes*.
2. Click ▌ *Sales Quotes* ❭ *Maintain Item Types* ❭.
3. Click *Add Row* or select existing row.
4. Place a checkmark in the *Not Pricing Relevant* box.
5. Save your entries.

> **i Note**
>
> This *Not Pricing Relevant* item type is available in external pricing and offline pricing sales orders. You can still add a price for this product manually.

7.3.6.3 Define Item Increment per Document Type

Administrators need to define item increment numbers, which allow you to control *Item Increment* and *Sub Item Increment* ranges.

1. To quickly navigate to the fine-tuning activity, go to ▌ *Business Configuration* ❭ *Overview* ❭ *Activities* ❭ *Search* ❭ and type *Sales Quotes*.
2. Click ▌ *Sales Quotes* ❭ *Maintain Document Types* ❭.
3. Click *Add Row* or select an existing row.
4. Enter or modify the desired *Item Increments*.
5. Save your entries.

> **i Note**
>
> Increment configuration eliminates limitations for bill of materials (BOM) explosion when there are many *Sub Items* in external pricing.

7.3.6.4 Configure Follow-up Item Type Determination

Administrators can set up your solution to determine the item type for follow-up documents. The follow-up sales quote to sales order process allows you to copy item types that are used for SAP ERP and CRM processing.

1. To quickly navigate to the fine-tuning activity, go to ▌ *Business Configuration* ❭ *Overview* ❭ *Activities* ❭ *Search* ❭ and type *Sales Quotes*.

2. Choose *Maintain Follow-Up Item Determination*.
3. Choose *Add Row*.
4. Enter the desired details and save your entries.

> **i Note**
>
> Users can use adaptation or personalization to add the item type to the sales quote product table.

> **i Note**
>
> You can also use code list restrictions to filter item types based on a document type.

7.3.6.5 Use Sales Quote Item Types

Use item types to process items based on *SAP ERP* logic for external pricing and integration.

> **i Note**
>
> Users may need to add the *Item Type* field using *Personalize* or *Adapt* in sales quote *Product* tab.

7.3.7 Calculate Quantity

Use the calculate quantity action to create a summary of the number of items for each unit of measure.

This summary can help identify potential upselling opportunities if a specific quantity needs to be met for a promotion.

Related Information

Cross, Up, and Down Selling in Sales Orders [page 541]

7.3.8 Display Net and Gross Weight, Total Volume in Sales Quote Header

You can view the calculated net and gross weight, as well as volume data in sales quotes when your administrator configures them in the product master.

To view and use this functionality, from *Sales Quotes*, go to *Personalize* or *Adapt* and add the hidden fields *Net Weight*, *Total Weight*, and *Volume* to the header item.
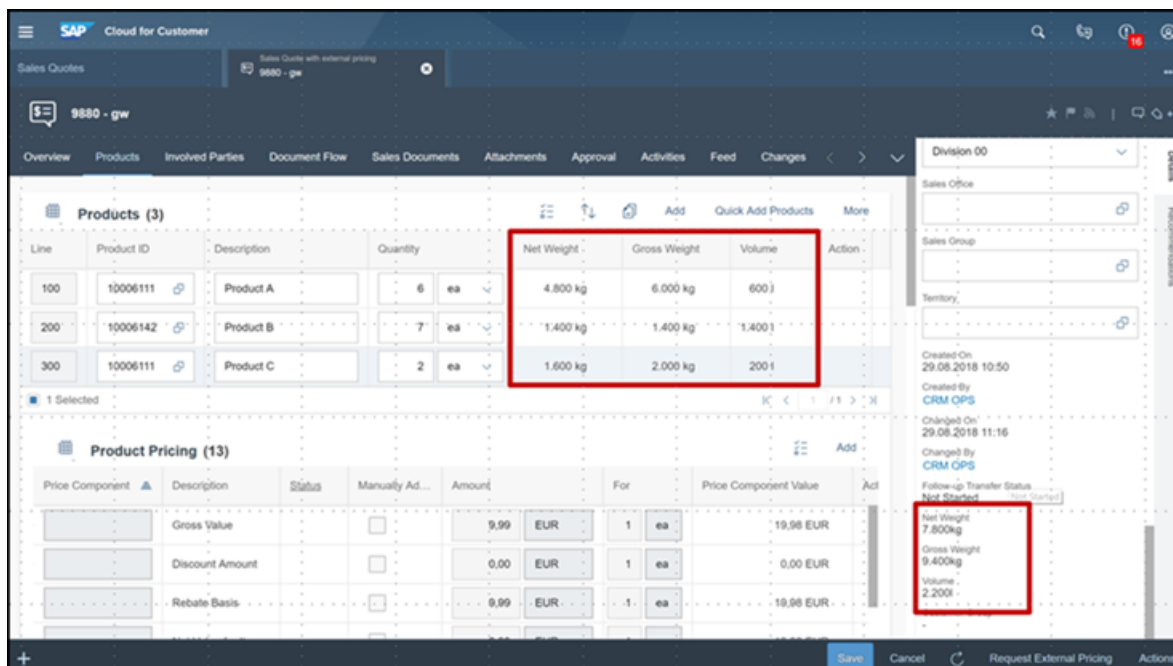
> **i Note**
>
> Sales quotes using external pricing or bi-directional integration receive the net weight, gross weight, and volume directly from SAP ECC.

7.3.9 Add Quick Products from Product Lists to Sales Quotes

Learn how to quickly add products and related quantities to sales quotes or sales orders using the action *Product Lists*.

Procedure

1. Open or create a sales quote or sales order.
2. Click *Quick Create*. Alternatively, you can add quick products from the quote or order from ▶ *Actions* ❯ *More* ❯.
3. Click ▶ *Actions* ❯ *More* ❯.
4. Add products from the defined product lists.

   When your administrator maintains *Product Lists*, you can multiselect products based on defined proposals that depend on:
   - Target groups
   - Accounts
   - Account hierarchy

- o Sales data
- o Territory

You can also copy and paste products to list using *External ID*.

7.3.10 View Stock Information for Products

You can view stock information for products synchronized from SAP S/4HANA.

Stock information is obtained at the plant level and is displayed in the *Stock Overview* tab. The *Stock Overview* tab can be viewed from the product details overview tab and quick view.

> **i Note**
>
> The data is only synchronized from a connected SAP S/4HANA.

You can select a plant based on stock results to get a better product availability in sales order or sales quote. You can also give stock information to a customer.

7.3.10.1 Configure Stock Information Update for Product

Administrators must scope the feature before you can use it.

To view stock information from SAP S/4HANA, follow these steps:

1. Navigate to ▶ *Business Configuration* 〉 *Implementation Projects* ◢ and select your project.
2. Go to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Communication and Information Exchange* 〉 *Integration with External Applications and Solutions* 〉 *Integration of Master Data* ◢ and select following scoping question: *Do you want to receive stock information from an external application?*

7.3.11 Use Cross, Up, and Down Selling

Learn how the solution uses cross selling to display proposed products to users when creating sales transactions.

Cross, up, and down selling offers proposed products, which can be added to a sales document when selected by the user.

When sales quotes include required products from the list, users see a list of related products, product upgrades, or economical products in the sales transactions.

1. If you use cross-sell products, to the sales quote or sales order, navigate to *Recommended Products* on the *Products* tab.

> **i Note**
>
> The *Recommended Products* tab is only visible if your administrator has defined cross-selling. Up and down-selling is indicated using an action. Clicking the action allows you to select and exchange the product. For quotes, you can add the product as an alternative item.

2. Click ▶ *Action* ❯ *Up/Down Selling Products* ❯.

> **i Note**
>
> The *Up/Down Selling Products* field indicates that users can replace the product to use up or down-sell. The icon only appears if your administrator has defined the applicable product proposals.

3. Enter the desired quantities.
4. Save your entries and continue processing the sales quote.

7.3.11.1 Enable Cross, Up, and Down Selling

As an administrator, you can create product lists of the Cross/Up/Down Selling type to enable users to select from those products in a sales quote.

1. Go to ▶ *Products* ❯ *Product Lists* ❯ *New* ❯.
2. Choose from either the *Personalize* or the *Adapt* menu to modify the screen layout.
3. Add the *Type* field to the *New Product List* box and save your changes.
4. Create a new product list and select *Cross/Up/Down Selling*.
5. Go to the *Required Products* tab and add the reference products.
6. Go to the *Proposed Products* tab to add products and select their types as either cross, up, or down selling and save your product list.
   Any time a sales quote includes one of the required products from the list, the associated proposed products are available for cross, up, or down selling, depending on their type in the product list.
   - Cross selling: results in a list of recommended products in the sales quote that the user can add directly to the quote.
   - Up or down selling: results in an icon in the products list of a sales quote to indicate that the user can replace the product, to up or down sell, from *Actions*.

Related Information

Product Lists [page 874]

7.3.12 Add a Sales Quote Customer Part Number

Learn about adding and using customer part numbers in quotes.

Administrators can add customer part numbers to quotes by navigating to ▶ *Products* 〉 *Product Administration* 〉 and the part numbers are integrated to *SAP ERP*.

Users can enter the customer part number located in the sales quote *Products* tab in the *Description* field. The system converts the ID to an internal ID.

1. Click *New* to create a new product or open an existing one.
2. Click the product *Sales* tab.
3. Under *Customer Part Number*, click *Add Row*.
4. Enter the customer, customer part number, and description.

    > **i Note**
    >
    > The customer part number description is language independent.

5. Save your entries.
6. Adapt output forms to include the customer part number.

> **i Note**
>
> The part number is not dependent on the sales organization or the distribution channel.

7.3.13 Structure and Renumber Sales Quote Products

You can use text items that allows you to define and structure subitems. If you only enter a product description in its corresponding field without an adding a product ID, the item is treated as a text item. In addition, the item number can be edited.

The action *Renumber* can be used to reorder items. This action allows you to put items in-between a certain order. If the sales quote has not been submitted to a customer, the *Line* field is editable.

> **i Note**
>
> Cluster sales quote items using text items and *Parent Line* field. You can also click *Action* to create a subline for a text item.

You can also use the action *Renumber* to add alternative items.

7.3.14 Assign Opportunities to Sales Quotes

Learn how to assign an opportunity to a sales quote.

A sales quote can be created as a follow-up document from an opportunity. When the task is done, involved parties and products are copied over to the sales quote.

1. Open an existing sales quote or create a new one.
2. In the *Opportunity* header section, add an opportunity ID or description.

> **i Note**
>
> If an opportunity is already assigned, you can enter another opportunity ID or description.

3. Save your entries.

> **i Note**
>
> You can set an assigned opportunity as *Primary Quote*. This action creates the *Update Opportunity* field. Once you click *Update Opportunity*,

4. Notice that the *Expected Value* of the assigned opportunity has modified once you save your entries.
5. Click *Refresh*.
6. Click the *Document Flow* tab to view the assigned opportunity.

7.3.15 Assign Opportunities to External Read-only Quotes

Assign opportunities to external sales quotes.

Assign an existing opportunity to an external sales quote (for example, only quotes that are replicated from SAP S/4HANA or SAP ERP to SAP Cloud for Customer).

The assign opportunity to external read-only quotes feature allows you to connect and track external sales quotes for an opportunity. View the sales in *Document Flow*.

7.3.16 External Product ID Added to Cross/Up/Down Selling for Quotes

Display the *External Product ID* popup selection for *Cross/Up/Down Selling* or the *Recommended Products* view. To add the *External Product ID* field, go to *Adapt* or *Personalization*.

7.3.17 Work with Sales Quote Involved Parties

Determine involved parties for sales quotes using party roles and the applicable determination rules, which allow you to streamline team assignments. In addition, it ensures that business partners are correctly assigned to business documents in accordance with your company needs.

Example

You can create a sales quote and add an account as the ship-to party. In this example, the account is the business partner, and ship-to is the party role. The ship-to account may be a subsidiary of a parent company, which is a different account. You may have the parent company account as the bill-to party.

7.3.17.1 Enable Display Determination Method for Involved Parties

Administrators can learn how to analyze sales quote party determination or re-determination.

This enablement makes party and re-determination more transparent for administrators.

Navigate to the personalize or adapt mode. From the *Involved Parties* tab of sales quotes, add the *Determination Method* field.

> i Note
>
> If the determination is copied or created as follow-up once accounts are changed, you manually enter the party role *Account*.

7.3.17.2 Fine-tune Custom Party Roles on the UI

Administrators can assign up to three custom party roles on the UI.

Go to fine-tuning activity ▶ *Sales Quotes* 〉 *Involved Parties* 〉 *Assign Party to UI* ◼ and assign up to three roles.

7.3.17.3 Maintain Document Addresses

Learn how to add address party details.

Navigate to adaptation or personalization mode. Add the *Address* field for the *Party Details* and *Contacts* tabs on the *Involved Parties* tab for sales quotes.

7.3.17.4 Maintain Involved Parties on Item Level

Users can maintain involved parties on item level.

1. From the *Products* tab, use personalize or adapt to add *Item Involved Parties*.
2. Administrators must go to fine-tuning activity ▶ *Sales Quotes* ❯ *Involved Item Parties* ◀ .
3. Party roles on item level are copied from header parties. If you do not need party roles for reporting or follow-up processes, we recommend deactivating them in the item party schema.

> **i Note**
>
> Ship-to parties are maintained in the sales quote product table. Please keep the activation in the item schema in case a copy and follow-up action should also copy the item party.

7.3.17.5 Add Custom Party Roles from Quick Create or Overview

Add important custom party roles directly in the quote *Quick Create* or from the sales quote *Overview* screen. The feature is not supported in offline mode.

7.3.17.6 Use Sales Quote Ship-to Party on Item Level

Change the delivery address on item level by selecting a different Ship-to party or Ship-to address.

You can also modify a document address. When changed, the document address is only applicable for the transaction, also referred to as a one-time address.

If the Ship-to field is not visible on sales quotes, add it by navigating to the adapt for personalize mode.

> **i Note**
>
> The *Address* field changes to *Document Address* if the address is not copied from master data.

7.3.18 Copy and Paste Product Mass Entries in Sales Quotes

You can copy items from Excel using the copy and paste function in the product table.

This task allows you to quickly paste products to a sales quote. Ensure that the copied data exactly matches the order of columns in the user interface so that the combined fields represent two columns.

1. Open a sales quote with product line items.
2. Go to the *Products* tab of the quote.
3. Click the *Paste* icon and the paste field appears.
4. Click in the *Paste supported data, such as Excel* field.
5. Use your keyboard paste function, such as Ctrl + V (or Shift + Insert) to paste the data in the field.

> **i Note**
>
> The number of input fields should not exceed the maximum number of exposed fields.

7.3.19 Disable Sales Quote Copy and Paste Function

Users can disable the copy and paste function allowing you to quickly paste products to a sales quote in the product table. To disable the function, go to ❯ *Adaptation* ❯ *Sales Quotes* ❯ *Products* ❯ deselect *Copy&Paste.*

7.3.20 Remove Personal Data in Sales Contracts

The depersonalization function allows users to remove personal data from a business object, such as sales contracts, to ensure compliance with the applicable data protection requirements.

Depersonalization is only available for users with access to the *Data Protection and Privacy* work center.

The *Data Privacy Management* tab allows those responsible for data protection issues in an organization to respond to personal information removal and disclosure.

Remove personal data in contracts by navigating to ❯ *Contracts* ❯ *All Contracts (or select desired contracts* ❯ *Actions* ❯ *Depersonalize.* ❯

7.4   Process Sales Quotes

Sales quote processing is used to offer products to customers according to specific terms with fixed conditions. In addition, the seller is bound by the sales quote for a specific period of time.

Process Flow

The following steps explain the typical process flow for sales quote processing. During this process, you access the *Sales* tab.

1. The sales representative creates a sales quote, enters an account, and the products to be offered.
2. The system uses details such as accounts, products, and date to calculate a net value. The user can overwrite the automatically determined prices and discounts or add further discounts and surcharges.
3. Optionally, if certain thresholds have been exceeded, the sales quote may need approval according your approval processes.
4. The sales quote is sent to the customer through the *Submit* action according to the output settings.
5. If the customer accepts the sales quote, the user sets it to *Won* and the status changes to *Completed*. With an external integration, such as SAP ERP, you can also transfer the sales quote into a sales order in the external system through ❯ *Action* ❯ *Create Sales Order* ❯ .

Activities in Sales Quotes [page 476]
    Learn about tracking all sales quote related activities.

Sales Quote Languages [page 482]
    Learn how to modify quote output languages.

Learn about the sales quote approval process and how to define an approval process for acceptance of sales quotes, including e-mail approval.

7.4.1 Activities in Sales Quotes

Learn about tracking all sales quote related activities.

Follow-up activities, such as appointments, tasks, phone calls, and e-mails can be created directly from the sales quote. Activities can also be viewed in the document flow of a sales quote.

Users can select the action *Add Tasks from Activity Plan* to assign predefined tasks from an activity plan to the sales quote. The *Activity Plan* supports the creation of tasks that, can be used to follow a sales methodology.

> **i Note**
>
> E-mails can also be assigned to the sales quote using MS Outlook integration.

7.4.1.1 Configure Activities for Sales Quotes

Configure activities, for example, appointments, e-mail, phone calls, and tasks to record information sales quote results from interactions between business partners in the solution.

Administrators can scope activities list for sales quotes.

Go to *Business Configuration* > *Implementation Projects* . Select your project and navigate to *Edit Project Scope* > *Scoping* > *Sales* > *Account and Activity Management* > *Activity Management* .

In fine tuning, you can further define *Activities*.

7.4.1.2 Add Attachments to Sales Quotes

You can attached documents on item and on header level. If the attachments need to be part of the output, select the relevant attachments in the output settings. Click *Submit* and the output is triggered.

7.4.1.3 Configure Rich Text Format for Sales Quote Output E-Mails

Administrator can configure rich text format for sales quote output e-mails. This reduces the effort on e-mail editing.

1. Go to ▌▶ *Business Configuration* ▶ *Implementation Projects* ▐ and select your project.
2. Click ▌▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *New Business* ▶ *Communication for New Business* ▐ and select the scoping question: *Do you want to use formatted text for sales quote output email body?*

7.4.1.4 Configure Attachment of Product Images to Sales Quote Output Forms

Administrators can scope output forms so users can add images to sales quote output forms.

Go to ▌▶ *Business Configuration* ▶ *Implementation Projects* ▐. Select your project and navigate to ▌▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *New Business* ▶ *Communication for New Business* ▐ and select the scoping question: *Do you want to add product images to the Sales Quote form template?*

> **i Note**
>
> When users add product images to form output messages, system performance is influenced.

7.4.1.5 View Sales Quote Statuses

Learn how to distinguish the meaning of various sales quote and sales order statuses.

Progress Statuses for Sales Quotes

- *Not Relevant*: The initial status of a sales quote.
- *Pending*: quote has been submitted to a customer (implies that submitted quote items cannot be deleted). In case of bi-directional replication quote turns to pending, once the quote is transferred to *SAP ERP*.
- *Won*: Displayed when a quote has at least one referenced sales order (SAP ERP) or was manually set using the action *Set As Won*.
- *Lost*: Used to cancel a quote. Set a reason for rejection, by entering one in the *Reason for Rejection* field. Alternatively, use the action *Set to Lost*.

Life Cycle Statuses for Sales Quotes

- *Open*: User created an initial quote.
- *In Process*: User canceled a quote item or at least an item is referenced to a sales order (*SAP ERP* (bi-directional replication)). Additionally, user triggered the action *Create External Follow-up Document*.
- *Completed*: All items are referenced to SAP Cloud for Customer orders or quotes have been set to won or lost using the *Reason for Rejection* field on the header). In case of bi-directional replication, the status *Completed* is based on SAP ERP logic. If a *Create External Follow-up Document* was created, the quote status changes to *Complete*, if one follow-up sales order in SAP ERP was created.

Cancellation Statuses for Sales Quotes

The statuses refer to canceled items. The status can be found on sales quote header and item level.

- *Not Canceled*: The user did not set a *Reason for Rejection*.
- *Canceled*: The complete quote is canceled for header status; item is canceled for item status.
- *Partially Canceled*: At least one item is canceled (The user sets the reason for rejection on item level).

> **i** Note
>
> The status is not applicable on item level.

Transfer Statuses for Sales Quotes

The statuses refer to *SAP ERP* bi-directional integration.

- *Not Started*: The initial status if a quote is created in SAP Cloud for Customer.
- *In Process*: A replication message was triggered to the external SAP ERP system. The SAP Cloud for Customer sales quote becomes read only. If no confirmation message is received by the SAP Cloud for Customer system, message monitoring is required to analyze the top level cause. Transfer Logs tab allows you to revoke (the replication of) the sales quote. Revoking allows changing the SAP Cloud for Customer quote again to correct the data. This action causes the message to fail and replicates it again.
- *Finished*: The transfer is completed and confirmation message from the on Premise system has been successfully returned to SAP Cloud for Customer.
- *Interrupted*: The transfer was interrupted due to an error in the external system. Error information provided by the external system is displayed on the *Transfer Logs* tab. The sales quote is editable and can be processed once the error is resolved.
- *Not Relevant*: Not applicable.

Approval Statuses for Sales Quotes

- *Not Started*: The initial status.

> **i Note**
>
> The *Approval* status changes to *Not Started* once the *Approved* or *In Revision* quote is modified. This action is not valid for bi-directional replication document types. An approved quote is submitted automatically to SAP ERP once the quote is approved. If the quote was created in SAP ERP, no approval status is displayed in SAP Cloud for Customer

.
- *Approval Not Necessary*: The quote has been submitted and approval conditions are not met.
- *In Approval*: The quote action *Submit* has been triggered and approval conditions are reached to start the approval process.

  > **i Note**
  >
  > The quote cannot be edited except for entering text in the approval note.

- *Approved*: The quote has been approved by the respective manager.

  > **i Note**
  >
  > The approval submits the quote automatically based on the defaulted output settings. If bi-directional replication is used, the approval automatically causes the quote submission to SAP ERP.

- *Revision*: A quote has been sent back for revision by a respective manager.
- *Rejected*: With this status, users should click *Send back for Revision*.
- *Withdrawn*: Based on the user action, the submission process has been revoked for an approval of a relevant quote.

Credit Statuses for Sales Quotes

The credit status is derived from external pricing with on Premise system.

- *Limit Exceeded*
- *Limit not Exceeded*
- *Manually*
- *Check Pending*
- *Not relevant*

Reference Statuses for Follow-up Sales Orders

These following statuses refer to follow-up sales orders that are created in SAP Cloud for Customer or in SAP ERP.

- *Not Started*: The initial status.
- *In Process*: This status corresponds to the SAP ERP status *Partially Referenced*.

  > **i Note**
  >
  > Some items are referenced to a sales order.

- *Finished*: All items are referenced to a sales order.
- *Not Relevant*: Refers to a text item (Item status).
- *Interrupted*: Not applicable.

7.4.1.6 Track a Quote Follow-up Transfer Status

Learn how to track an external follow-up document (developed mainly for a sales order in *SAP ERP*) from your cloud solution. This is useful to track if an error happens and the status does not change to *Finished*.

If no confirmation message is received by the SAP Cloud for Customer, the *Follow-up Transfer Status* remains in status *In Process*. In addition, message monitoring is required to analyze the top level cause.

> i Note
>
> The following statuses are supported:
>
> - *Not Started*
> - *In Process*
> - *Finished*

To view and use the *Follow-up Transfer Status* field add it from adapt or personalize. You can add the field in *Advanced Search*, the result list, and the detailed section.

7.4.1.7 Use Follow-up Actions in Sales Quotes

With integration with an external system, where you, for example, process your sales orders, you can capture references to the follow-up documents in the quote ▌▶ *Sales Documents* ❯ *External Follow-Up Documents* ❯.

If your administrator has configured external follow-up documents, the action *Create External Follow-up Document*, creates a follow-up sales order.

Related Information

Create a Follow-up Sales Quote [page 491]

7.4.1.7.1 Block External Follow-up Documents for Prospects

As an administrator, learn how to disable external follow-up documents for prospects.

To block external follow-up documents for prospects, disable the action *Create External Follow-up Document* in SAP ERP. This action means prospects won't receive follow-up documents.

Go to ▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▶ *Edit Project Scope* ❭ *Questions* ❭ *Communication and Information Exchange* ❭ *Integration with External Applications and Solutions* ❭ *Integration with SAP ERP* ❭ and select the scoping question: *Do you want to block prospects created in your cloud solution from being replicated to your SAP ERP solution?*

7.4.1.8   Add Sales Quote Header and Item Notes

You can add internal and external notes to a sales quote only on header level.

Notes maintained as *External* are automatically printed to the standard sales quote output print form delivered with the solution. This function includes sales org. and distribution channel dependent notes maintained in the product master by the administrator. With this function, the notes are automatically copied to the external product note of the sales quote.

When working in the *Notes* tab, you can increase the size by enlarging the pane.

> **i Note**
>
> Restrictions on printing formatted notes are applicable.

7.4.1.8.1   Enable Formatted Text

Administrators can enable the use of formatted texts for notes in sales quotes.

Configure the use of external and internal notes by navigating to ▶ *Business Configuration* ❭ *Scoping Element: Sales* ❭ *New Business* ❭ *Questions* ❭ *Sales Quotes: Do you want use formatted texts for Sales Quotes?* ❭

Once the scoping is complete, users can enter and edit standard notes on header and item (Internal and External Note).

If you're using the sales quote form template *Sales Quote Demo*, then the formatted texts are included when printing.

> **i Note**
>
> To enable formatted texts in other quote form templates, switch the data type from plain text to rich text in Adobe® Livecycle Designer.

7.4.1.9 Configure Sales Quote Versioning

Administrators can configure sales quote versioning, allowing users to send customers sales quotes with the same sales quote ID (*Group ID*) in addition to a version number.

Configure sales quote versioning by navigating to ▶ *Business Configuration* ❯ *Scoping Element: Sales* ❯ *New Business* ❯ *Sales Quotes* ◀ and place a check mark for the question *Do you want to user Sales Quote Versioning?*

User can only create an external follow-up document for SAP ERP for quote that are not in *Active* status and have been submitted.

Quote versions cannot be created in offline mode.

If a quote is replicated to or from an external system, versioning is no longer possible.

> → Remember
>
> Adjust the form templates (aside from the *Sales Quote Demo*) so that the *Group ID* appears in the printout.

7.4.1.10 Create Sales Quote Versions

Users can send customers sales quotes with the same sales quote ID (*Group ID*) in addition to a version number to customers.

Users can create and track sales quote versions in the sales quote *Versions* tab. When you highlight a quote and click ▶ *Action* ❯ *New Version* ◀, the selected quote is copied with the same *Group ID* and version increment.

> → Remember
>
> Only one active sales quote version with the same Group ID can exist and be edited. Click ▶ *Action* ❯ *Activate Version* ◀ to activate the quote version.

Use the life cycle status vale *Inactive Version* to filter quotes for reporting.

Use advanced or basic search to locate and track quote versions using the *Group ID* field in your search criteria.

7.4.2 Sales Quote Languages

Learn how to modify quote output languages.

By default, it is set according to the account master data set-up by your Administrator.

1. Open a quote.
2. Navigate to the *Personalization* or *Adapt* mode.
3. In the header, select ▶ *Add Items* ❯ *Add Fields* ◀.
4. Place a checkmark in the *Language* field.

5. Save your entries.

> **i Note**
>
> If you change the language after you already entered some items, the item descriptions have not been automatically translated.
>
> Please keep in mind that you can print forms only in languages with a translated template form.

7.4.3 Sales Quote Approval Process

Learn about the sales quote approval process and how to define an approval process for acceptance of sales quotes, including e-mail approval.

If your administrator has configured approvals, a task is triggered to forward the quote or hinder it from moving to the next stage.

Administrators can set up multilevel approval processes. Based on the configuration settings, user can:

- Edit and view approval notes in the *Approval* tab.
- Withdraw from approval under *Actions*, using the *Withdraw from Approval* field.
- Manager can approve quotes from notifications or directly in the sales quote *Approval* tab.

When approving quotes in e-mails, the approver approves the quote or sends it back for revision from *Notification* actions or using the sales quote *Approval* tab. Alternatively, you can directly approve the quote in from e-mail. If there is no system access, the sales quote print preview document is appended to the e-mail.

Approvals are submitted automatically based on the sales quote output settings.

> **i Note**
>
> E-Mail approvals require a certification setup for Microsoft Outlook and Multipurpose Internet Mail Extensions (MIME) configurations.

7.4.3.1   Configure Approvals

Administrators can explore how to incorporate conditions into the sales quote approval process, such as limits to the amount an approver is allowed to approve.

Activate the sales quote approval process under ▐▶ *Business Configuration* ▶ *Implementation Projects* ▌. Select your project and navigate to ▐▶ *Edit Project Scope* ▶ *Sales* ▶ *New Business* ▌.

Once you scope sales quote, then you detail the approval process. For this step, you define the approval conditions and an approver before the approval process is ready to use. Navigate to ▐▶ *Administrator* ▶ *Approval Processes* ▌.

> **i Note**
>
> At least one approval process must be active. To define an approval process, copy the default approval process and adapt the approval validity, ensuring one process has an unlimited validity.

7.4.3.2 Configure Sales Quote Approver Determination

As an administrator, learn how to edit the sales quote approval process.

Administrators can perform advanced quote approval process modifications. You can edit or add steps, change the order of existing approval steps, and define approver conditions. Navigate to ▶ *Administrator* ❯ *Approval Processes: Sales Quote* ❯ *Work Distribution* ❯ *Customer Defined Involved Party* ◀ or *Customer Defined Territory Owner*.

Follow the steps to finalize the advanced sales quote approver determination:

1. Navigate to the fine-tuning activity *Party Role Definition*. Create a new party role and assign party category *Approver*.
2. Navigate to the fine-tuning activity *Involved Parties for Sales Quotes*. Add the role to the sales quotes involved parties.

   > **i Note**
   >
   > You can also define determination for the standard party role *Approver*.

3. Add a new determination step *User Rules* for *<z-party>* for the newly created party.
4. Continue by navigation to ▶ *Administrator* ❯ *Sales and Marketing Settings* ❯ *Define Rules for Sales Quote Parties* ◀.
5. Finally, navigate to ▶ *Administrator* ❯ *Approval Processes* ◀ to add the work distribution *Customer Defined Involved Party* to the sales quote approval process.

Related Information

7.4.3.3 Configure Re-submit for Quote Approvals

Administrators can learn how to configure resubmit for sales quotes. Once quotes have been approved, the business option allows your company to control the approval status and or the output status.

If you do not select the business option, each change in the quote (aside from adding attachments) changes the approval status to *Not Started*. Also, to further process the quote, users must submit it again for an approval and output.

> **i Note**
>
> If a quote with bi-directional replication to SAP on Premise system exists, a reset of the approval status is not possible.

When you select this option, the automatic reset of these statuses from most modifications is deactivated. Instead, the reset can be configured based on conditions in the workflow rules. The reset is achieved from one of the following actions:

- *Reset Submit* (for approval and output statuses).
- *Reset Output Status* (for only the output status).

Configure *Re-submit for Quote Approvals* by navigation to ▌▶ *Business Configuration* ❭ *Scoping Element: Sales* ❭ *New Business* ❭ ❭ *Sales Quotes* ❭ *Do you want to control the reset of the approval status and output status via workflow rules?* ❭

Continue the setup by:

1. Defining workflow rules by navigating to ▌▶ *Administrator* ❭ *Workflow Rules* ❭.
2. Defining conditions that should trigger additional approvals in the workflow rule and select the desired action users can choose from:
   - *Reset Submit* - The action resets the approval status to *Not started*, including the output status. To further process the quote, users click ▌▶ *Actions* ❭ *Reset Submit* ❭.
   - *Reset Output Status* - The action resets the output status (confirmation issue status). The approval status remains as *Approved* or *Approval Not Necessary*.

   > **i Note**
   >
   > The *Submit* action generates a new output document without the need for an additional approval process.

7.4.3.4   Configure Rule to Revoke Quotes with In Approval Status

If for example, a custom defined time period is exceeded, administrators can create a rule to revoke sales quotes with status *In Approval* to *Not Started.*

Administrators can create a rule by defining the *Rule Type* action *Reset Submit.*

> **→ Remember**
>
> As of the February 2018 release, only approval status *Approval Not Necessary* and *Approved* are supported for revocation.

7.4.3.5   Use New Workflow Rule for Recipient Determination

When you create workflow rules for either sales quotes or sales orders, you can choose to have the solution determine recipients from either the account team or territory team.

7.4.3.6   Use Workflow Rules and Field Updates

Workflow rules can be used to configure the sending of notifications, text messages, or E-Mails to internal or external parties based on defined conditions.

You can also use workflow rules to update fields in the sales quotes. User can view executed workflow rules in the sales quote under the *Workflow Changes* tab.

7.4.3.7   View Additional Sales Quote Details

Learn more about sales quote details you can view or modify.

Sales Quote Tabs

Overview

On the *Overview* tab you see the latest quote changes, products, and involved parties.

Products

- On the *Products* tab, you can add or delete products, enter external and internal notes, and add attachments.
  You can also view and change the internal and external notes for the sales quote and the products: The *Internal Note* details ares only stored with the document. If you use external integration., the *External Note* is forwarded to the customer and forwarded to the external system.
  If you use integration with an external system to calculate the prices for the products, you receive product prices by clicking ▶ *Actions* ❯ *Request Pricing* ❯. The fields *Pricing Status* and *Pricing Procedure* inform you about the current status of the request.

  > **i** Note
  >
  > ○ When you copy a line item, the notes and attachments are copied as well.
  >
  > ○ You can also add products from the product list by clicking ▶ *Actions* ❯ *Add from List* ❯.

Involved Parties

- On the *Involved Parties* tab, you add or delete parties and contacts. You can also select an address that was maintained in master data.

Sales Document

- The *Sales Documents* tab is where you find an overview about the related sales quotes and the sales order requests and sales orders processed in the SAP ERP system.

Document Flow

- The *Document Flow* tab is where you view all preceding and all follow-up documents for a particular quote.

Attachments

- On the *Attachments* tab, you add attachments, for example, local files, web links, and links to Library content.
  If the customer accepted the quote directly during a visit, and signed it on the tablet, the customer's signature is displayed.

  > **i Note**
  >
  > Legally binding integration of digital signatures is supported using partner solutions.

Approval

- On the *Approval* tab, you enter additional information for the approver. In addition, the approver can also add comments.

Activities

- On the *Activities* tab, an overview of the activities are displayed. You can also add appointments, tasks, and phone calls. E-mails related to a quote are displayed and you can add tasks from the determined activity plans.

Output

- On the *Output* tab, you view see the output history and the sent PDF document files. Resend the document by clicking *Resubmit*.

Feed

- The *Feed* tab displays major updates of the quote.

Changes

- On the *Changes* tab, you follow-up on all changes made in the document.
- On the sales quote *Changes* tab, you can see all changes made in the quote, but you can also filter for a specific time period. The list includes the originating and the new value after the change.

Tickets

- On the *Tickets* tab, you can find all related tickets for the particular sales quote and you can create tickets based on the quote.

Surveys

- On the *Surveys* tab, you can add and edit surveys from the determined activity plans to the document.

7.4.3.7.1 Use Sales Quote Feed

Learn how to collaborate with colleagues on sales quotes, which are relevant to you using the feed.

When users create or maintain quotes, an action is displayed in *Feed* or within the sales quote on the *Feed* tab.

Users can manage feed settings by navigating to ▶ *Personalize* ❯ *Feed Settings* ❯ *Feed Sources.* ❯

Select a person you follow and click *Edit* to open the *Manage Source Events* screen. Flag the desired automatic updates feed events triggered by the person you follow and add more tags if desired.

7.4.3.7.2 Use Sales Quote Change History

Learn about viewing sales quote modifications.

Users assigned to product lists can track product list modifications by adding the *Changes* field to the *Product List* tab.

Navigate to ▶ *Personalize* ❯ *Start Personalization* ❯ and click *Add Tab* to make the *Changes* tab visible.

Search for changes by filtering the following change history fields:

- *Changes Made From*
- *Changes Made To*
- *Attribute*
- *Changed By User*

7.5 Define Workflow Rule to Update Opportunity Custom Statuses

Administrators can define workflow rules that update opportunity custom statuses and reasons based on sales quote conditions.

This feature allows you for example, to set an opportunity to *Won*, if the related primary sales quote turns to *Won*.

> ! Restriction
>
> Custom values with the same descriptions cannot be distinguished in the workflow rule definition.

7.5.1 Modify Warning Message Regarding Multiple Sales Areas

7.6 Complete Sales Quotes

Learn various ways to complete a sales quote.

You have several options to complete a sales quote. If the sales quote is accepted, you can create a follow-up sales order either in the solution or as follow-up order in SAP ERP. In both cases, the follow-up order changes the quote to status *Completed* and progress to *Won*.

Canceling a sales quote is another way to complete a sales quote. Once you cancel a quote on header level by setting a *Reason for Rejection*, the progress is displayed as *Lost*.

> **i Note**
>
> Normally, quotes submitted to customers cannot be deleted unless your administrator has configured *Quote Line Deletion after Customer Submittal*. With this configuration, users will be able to delete quote items for quotes that have already been submitted to the customer.

Signatures [page 490]

Capture graphical signatures under ▶ *Actions* ❯ *Sign* ◀ .

Sending a Sales Quote to Customer Accounts [page 490]

Use output settings to determine how the sales quote is sent to accounts.

Create a Follow-up Sales Quote [page 491]

Learn to create follow-up quotes.

Sales Quote Preview [page 491]

Preview sales quotes before sending them to customers or prospects or share the preview document with colleagues.

Add Attachments to Completed Sales Quotes [page 492]

For sales quotes with a *Completed* status, go to ▶ *Attachments* ◀ and add files (header and item attachments).

Sales Quote Document Flow [page 492]

Use the document flow to view for example, the sales quote chain of associated documents such as opportunities, orders, and delivery.

Create Multiple Sales Orders from One Sales Quote [page 493]

Users can create multiple SAP Cloud for Customer sales orders from one sales quote.

Sales Quote Output Form [page 493]

Explore sales quote forms used for business document output.

Cancel a Sales Quote [page 495]

Learn how to cancel a sales quote.

Enable Quote Output Submission with Bi-Directional SAP ERP Integration [page 497]

Administrators can configure and enable the fine-tune activity to allow printing of sales quotes with bi-directional SAP ERP integration.

7.6.1 Signatures

Capture graphical signatures under *Actions* > *Sign* .

Signatures can be enabled in *Business Configuration* > *Implementation Project* > *Edit Project Scope* > *Questions* > *Sales* > *New Business* > *Sales Quote* > *Graphical Signature for Sales Quotes* *Do you want to capture and attach a graphical signature to the sales quote (Valid for touch enabled devices only)?*

The signature is included in *Sales Quote Demo* print form.

> **i** Note
>
> Legally binding integration of digital signatures is supported using partner solutions.

7.6.1.1 Embed Graphical Signature in Sales Quotes

Once configured, employees can sign a sales quote with a graphical signature and can create a new graphical signature.

To embed the employee signature to a quote, administrators are required to go to Adobe LiveCycle Designer and adapt the output form.

7.6.2 Sending a Sales Quote to Customer Accounts

Use output settings to determine how the sales quote is sent to accounts.

From the quote, select *Actions* > *Submit* . The output of the sales quote is triggered, depending on the maintained output settings. In the output settings you can define if a sales quote should be sent for example, using e-mail. The e-mail of the primary contact person is the default. A quote, which has been submitted to a customer appears with progress status *Pending*.

> **i** Note
>
> If a quote approval is required, the submit action triggers the approval notification. After final approval, the output is triggered automatically based on the defined output settings.

7.6.3 Create a Follow-up Sales Quote

Learn to create follow-up quotes.

Context

From your sales quote, you'll create follow-up sales quote based on an existing one which is not the same as copying a sales quote. When you create a follow-up sales quote, the header, item, and document flow are updated. When you copy a sales quote, the header and data are not copied and the document flow is not updated.

Procedure

1. In the sales quote where you want to create a follow-up quote from, select the *Sales Documents* tab.
2. Under *Sales Quotes* click *New*, the data from the current quote is copied into the quote.
3. Adapt the entries and select *Save and Open*.

    The system copies the whole quote including the products into a new document and opens it.
4. View the old quote to find the new quote located in *Sales Documents*.

    Continue to work with the new sales quote as desired.

7.6.3.1   Block External Follow-up Documents for Prospects

As an administrator, learn how to disable external follow-up documents for prospects.

To block external follow-up documents for prospects, disable the action *Create External Follow-up Document* in SAP ERP. This action means prospects won't receive follow-up documents.

Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▌▶ *Edit Project Scope* ❯ *Questions* ❯ *Communication and Information Exchange* ❯ *Integration with External Applications and Solutions* ❯ *Integration with SAP ERP* ▐ and select the scoping question: *Do you want to block prospects created in your cloud solution from being replicated to your SAP ERP solution?*

7.6.4 Sales Quote Preview

Preview sales quotes before sending them to customers or prospects or share the preview document with colleagues.

1. Open the sales quote.

2. Choose ▎▶ *Actions* ❭ *Preview* ❭ .
3. A new window opens displaying the quote PDF document.

7.6.4.1   Use Sales Quote PDF Preview

The sales quote preview is displayed in PDF form (generated by configuring form templates) when you click
▎▶ *Actions* ❭ *Preview* ❭ .

7.6.5 Add Attachments to Completed Sales Quotes

For sales quotes with a *Completed* status, go to ▎▶ *Attachments* ❭ and add files (header and item attachments).

7.6.6 Sales Quote Document Flow

Use the document flow to view for example, the sales quote chain of associated documents such as
opportunities, orders, and delivery.

The *Document Flow* shows related transactions, such as opportunities or activities.

> **i** Note
>
> You cannot access the printable sales quote PDF (derived in *SAP ERP*) in the document flow.

> **→** Tip
>
> Navigate to the sales quote ▎▶ *Document Flow* ❭ *PDF* ❭ to view the latest quote sent to accounts.

1. Open a business document such as a sales quote or sales order or find one using *Search*.
2. On the *Document* tab you see all preceding and all follow-up documents for this quote.
3. Click the links to open and view more document details.

> **i** Note
>
> You can view transactions such as activities in the sales quote document flow.

In the *Document Flow*, you can also view follow-up transactions in *SAP ERP*. For example, follow-up orders,
delivery or invoice transactions, including access to the related PDF documents (using the web service).

The *Document Flow* also displays SAP ERP references for sale and quotes and sales orders in SAP Cloud for Customer. Click the triangle in the yellow frame to open and close related SAP ERP transactions.

7.6.7 Create Multiple Sales Orders from One Sales Quote

Users can create multiple SAP Cloud for Customer sales orders from one sales quote.

The sales quote status changes to *Won* if a sales order reference exists.

Users can track the related call offs in the product table *Ordered Quantity* field. Navigate to *Personalize* to add the hidden *Ordered Quantity* field.

> **i Note**
>
> Ordered items which are not fully referenced to the SAP Cloud for Customer quote, will set the quote status to *In process*. As of the 1902 release, the quote status becomes *In process* not only if a referenced item in the order has been completely removed, but also when the referenced item quantity will be reduced

7.6.8 Sales Quote Output Form

Explore sales quote forms used for business document output.

Sales quote and sales order output first depends on how your administrator configures the form templates. Second, after configuration, when users submit sales quotes or orders to accounts, the document layout depends on the template selection users choose in *Edit Output Settings*.

> **i Note**
>
> Printing of price elements depends on the print configuration of the pricing schema.

> **i Note**
>
> The *Sales Quote Demo* template includes enhancements, such as product images, formatted notes, signature, GTIN, or customer part number.

Administrators configure **Print forms** - A read-only portable document format (PDF) documents that are generated from data stored in the system. Print forms can be printed, sent as an e-mail attachment, or faxed to business partners.

7.6.8.1 Configure Output Form

As an administrator, explore how to use the integrated Adobe® LiveCycle® Designer to make advanced changes to sales quote form templates.

Procedure

1. Go to ▶ *Administrator* ❯ *Form Template Maintenance* ❯.

   > **i Note**
   >
   > Adapt general changes on the output form from the master template in *Master Template Maintenance*.

2. Select the form template variant you want to edit and choose ▶ *Open* ❯ *Adobe LiveCycle Designer* ❯.
3. Make your changes.
4. Preview your changes using historical data or sample data.
5. Click *Save*.
6. Click *Publish* to finalize your entries.

7.6.8.2 Configure Sales Quote Output and Channel Determination

As administrator, learn about default sales quote form templates or output channels by sales organizations.

Adapt the columns to make a new selection of attributes visible in this table. Navigate out of the screen and return to it to see the changes.

7.6.8.3 Configure Reasons for Rejection

Administrators can learn how to configure reasons for rejection. The codes are used in documents such as quotes, orders, or contracts to define the reasons for rejection.

You define rejection reasons to describe why a document or item has been canceled.

1. To quickly navigate to the fine-tuning activity, go to ▌*Business Configuration* ❯ *Overview* ❯ *Activities* ❯ *Search* ▌and type *Reasons for Rejection*.
2. Click *Add Row*.
3. Enter the desired *Rejection Reason Code*.

> **i Note**
>
> When adding your own entries, the data you enter into field *Rejection Reason Code* must begin with the letter **Z**.

4. Enter the desired description.
5. Save your entries and set the desired status.

Users can cancel sales quotes on header and on item level. When canceled on header level, the rejection reason is copied over to the items.

> **i Note**
>
> Sales quotes canceled on header level cancels all of its items.

7.6.9 Cancel a Sales Quote

Learn how to cancel a sales quote.

Canceling a sales quote can be accomplished in various ways. Open the quote and:

- Set a *Reason for Rejection*.
- Trigger the action *Set to Lost*.
- Maintain a specific reason for rejection on header and item level.

> **i Note**
>
> If a quote is partially canceled, for example, a single line item is set to lost, the status of the quote is *In Process*.

7.6.9.1 Delete a Sales Quote

Learn how and when to delete sales quotes.

Context

You can delete quotes if quotes have not been submitted to customers and if no follow-up document or activity exists.

Procedure

1. Search for the quote you want to delete.
2. Check the status to ensure that the quote can be deleted.

   The progress status *Pending* displays that quotes have been submitted and cannot be deleted.
3. Click *Actions*.
4. Choose *Delete* and the sales quote is deleted from the system.

   > → Tip
   >
   > Quotes that have been submitted to a customer cannot be deleted, but you can cancel them.

7.6.9.2 Cancel a Single Item

Procedure

1. Search for the quote with the line items you want to cancel.
2. Set the line item *Reason for Rejection*. Alternatively, triggering the action *Set to Lost* cancels all items.

   > → Tip
   >
   > You can also maintain a specific reason for rejection on item level for the sales quote.

   If a quote is partially canceled, the status is changed to *In Process*.

7.6.10 Enable Quote Output Submission with Bi-Directional SAP ERP Integration

Administrators can configure and enable the fine-tune activity to allow printing of sales quotes with bi-directional SAP ERP integration.

Go to ▌ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▌ *Open Activity List* ❯ *Fine-Tune* ❯ *Sales Quotes* ❯ *Document Types* ❯ *Maintain Document Types* ❯ *Sales Quote with Replication* ▐. Place a check mark under *Direct Customer Acceptance* to enable quote output submission with bi-directional integration.

> **i Note**
>
> The configuration is not enabled for quotes with asynchronous pricing.

7.7 Sales Quote Pricing

SAP Cloud for Customer helps you stay competitive by allowing you to easily apply flexible internal, external, and offline pricing.
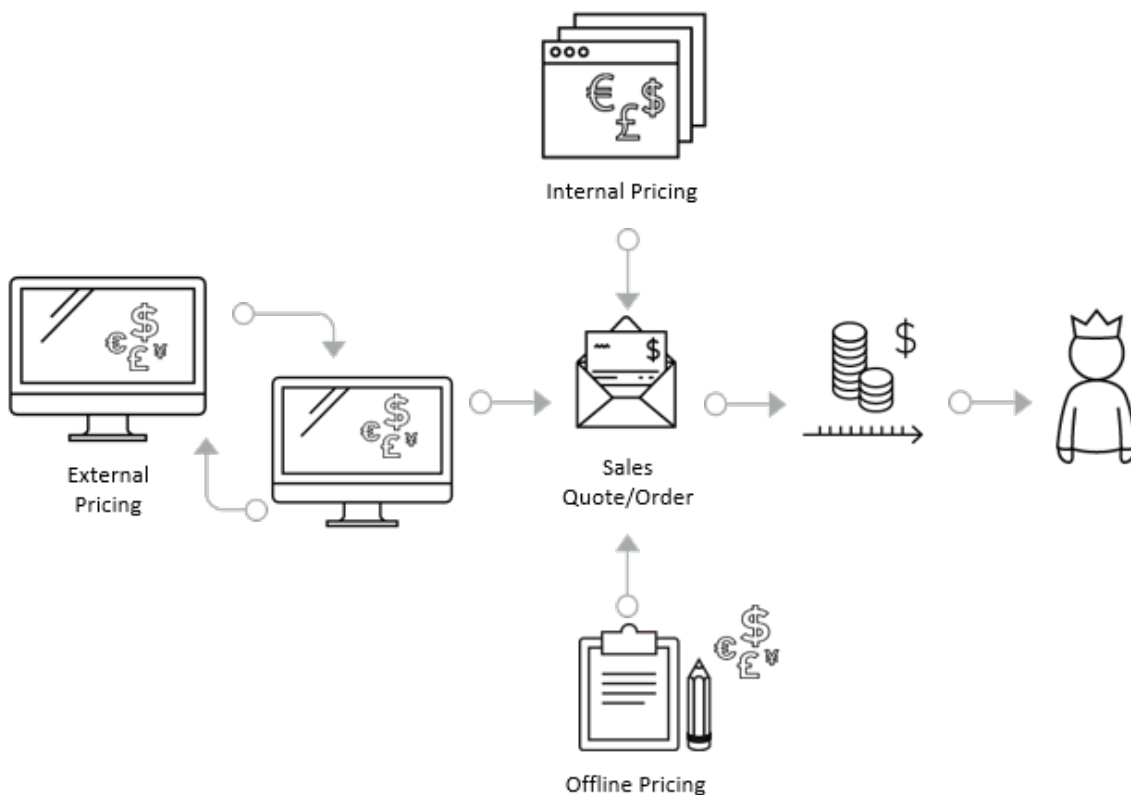
Users can offer competitive pricing to your customers when working with sales quotes and sales orders. Your administrator has preconfigured product price lists or your price determination in transactions is based on

price master data derived from an external SAP system. You can manually apply discounts and miscellaneous surcharges to sales quotes and orders. Users can overwrite certain pricing elements to make pricing more flexible.

Here's an overview of the SAP Cloud for Customer solution pricing types:

Internal Pricing – The solution offers internal net pricing. It is used if your company derives pricing from price lists or discount lists based on the solution master data. Internal pricing takes prices from the price list created by your administrator and can include optional predefined discounts. Depending on the solution set-up, users can apply various types of discounts, for example, to the total value or product item.

External Pricing – External pricing can be used for companies that retrieve their complete price information including tax details from an external SAP system. End-users request pricing via a user action to retrieve the external pricing result and apply discounts or other price elements if necessary. Also, your administrator can use the solution to determine credit limits and product availability information from this user action.

Offline Pricing – If your company has the SAP Cloud for Customer, extended edition, you can use offline pricing . In offline mode, you can calculate an estimated price value including a fixed or percentage based discount for your quotes and order items created in offline. Sync the discount details when you are working online again. You can also view the external pricing result in offline mode.

Internal Pricing [page 499]
> Learn about internal pricing for sales quotes and orders.

Dynamic Labeling of Price Elements [page 501]
> Administrators can change the price element user interface fields with the description of the assigned condition type or pricing procedure step. This configuration improves usability for users where there are different pricing procedures which lead to a change in the condition description.

Modify Internal Pricing for Sales Quotes [page 501]
> Learn how to apply discounts and miscellaneous charges to sales quotes and sales orders.

Add New Product Price Elements for Quotes and Orders [page 502]
> Administrators can use adaptation mode to add three additional price elements to the sales quote and sales order product table. The total price elements have been increased to eight to allow for better usability around price details. End users can add these new fields using personalization, if they have been enabled by the administrators.

Calculate Quantity [page 502]
> Estimate the amount of space needed for an order for delivery capacity planning purposes.

Check Credit Limit [page 503]
> When processing a sales order, ensure your customers are within their credit limit.

Request External Pricing with SAP ERP, SAP CRM, SAP S/4HANA [page 503]
> Learn more about how to request external pricing for sales quotes with SAP ERP, SAP CRM or SAP S/4HANA on premise solution.

Check Output Pricing to View All Price Components [page 505]
> Administrators can enable the new action *Check Output Pricing* using adaptation mode. This action allows users to view all price components that are available in the output form message as now they are defined as print relevant in the system.

Available to Promise (ATP) Check [page 505]
> Learn about the Available to Promise (ATP) check.

Use Free Goods Determination [page 506]

Simulate or transfer an order from SAP ERP to view the free goods that are available. With external pricing, you can also trigger free goods determination.

Bill of Material Explosion [page 506]
    View the bill of materials from SAP ERP system.

Modify Prices for Sub-Items of a Bill-of-Material [page 506]
    You can change the price conditions for sub-items that are determined in an external application.

Product Substitution [page 507]
    Use product substitution to automatically replace one product that you enter with another one when processing a sales quote.

7.7.1 Internal Pricing

Learn about internal pricing for sales quotes and orders.

SAP Cloud for Customer provides various internal price elements in the sales quotes and sales orders. Open a sales quote or sales order and go to the *Products* tab. The table displays the most important price details. This information and can be easily overwritten depending on how your administrator configures the solution.

Every product or service you have entered in the sales quote or order has its own line item number. From the line item you see the line item number, product ID, description, price, quantity, discount, and more depending on your solution setup.

1. Open an existing sales quote or order.
2. From the *Products* tab of the sales quote, click *Edit*.
3. Overwrite the list price line item or the line item discount and click *Update Pricing*.
4. If desired, from the header, modify the *Overall Discount (%)*.
5. Save your changes.

7.7.1.1 Configure Incoterms

Administrators need to configure incoterms.

1. Go to ▌ *Business Configuration* ❯ *Overview* ❯ *Activities* ❯ *Search* ▌ and type *Incoterms*.
2. Click *Add Row*.
3. Enter an *Incoterm* ID and description.
4. Set the *Location Mandatory* flag accordingly.
5. Save your entries.

7.7.1.2 Configure Payment Terms and Incoterms

As an administrator, you can configure payment terms and Incoterms (International Commercial Terms) to define when an invoice must be paid as well as the charges you company or the buyer pays.

Locate the fine-tuning activity by navigating to ❙▶ *Business Configuration* ❭ *Overview* ❭ *Search* ❭ *Accounts* ❭ and click *Maintain Payment Terms*.

1. Click *Add Row*.
2. Enter the desired details
3. Save your entries.

> **i Note**
>
> Payment terms are defaulted from the sales data of the account to the sales quote.

7.7.1.3 Configure Copy of Quote Pricing Date and Incoterms

If a sales quote is copied, administrators can configure the copying of the *Pricing Date* and *Incoterms*.

Procedure

1. To activate this action, navigate to *Fine-Tune.*
2. Select ❙▶ *Sales Quote* ❭ *Document Types.* ❭
3. Select the desired *Pricing Date* configuration details.

Related Information

Configure Pricing Date [page 515]

7.7.1.4 Configure Default Pricing Date

As an administrator, learn how to configure the default pricing date.

Define default logic for the *Pricing Date*.

- *(Today's Date)*
- *Requested Date (Header)*

Configure the pricing date defaults by navigating to the fine-tuning activity ▎▶ *Sales Quote* ❯ *Document Types* ❳.

Highlight the desired document type and select the desired logic type from the pricing date dropdown field.

7.7.1.5 Disable Mandatory Check for Internal Pricing Price Lists

Administrators or key users can navigate to *Adapt* to disable the mandatory check for the list price used for internal pricing. The function is useful if your company works with manual prices.

Disable the mandatory check for internal pricing by navigating to ▎▶ *Fine-tune* ❯ *Configure Price Strategy* ❳ and ensure there is a checkmark in the *Mandatory* field.

7.7.2 Dynamic Labeling of Price Elements

Administrators can change the price element user interface fields with the description of the assigned condition type or pricing procedure step. This configuration improves usability for users where there are different pricing procedures which lead to a change in the condition description.

Administrators can maintain the configuration under ▎▶ *Fine-tune* ❯ *External Pricing* ❯ *Labeling External Pricing Element.* ❳

7.7.3 Modify Internal Pricing for Sales Quotes

Learn how to apply discounts and miscellaneous charges to sales quotes and sales orders.

Context

To apply discounts and surcharges to sales quotes, do the following:

Open one of your sales quotes or create a new one. From the *Products* tab view of the sales quote, click *Edit* and overwrite the overall discount, list price line item, or line item discount. Click ▎▶ ❯ *Update Pricing* ❯ *Save your changes.* ❳.

You can add further price components for each line item when you navigate to the *Pricing* tab and the *Item Pricing* section of the sales quote. Select the line item *Expand* and from the drop-down box, select desired component.

> → Tip
>
> You can also change the line item description if desired.

You can add a price component for a complete sales quote when you:

Procedure

1. Open one of your sales quotes or create a new one.
2. Navigate to the sales quote tab ▐▶ *Pricing* ❯ *Total Pricing* ❯ *Add Row* ▶ and apply additional price components for the entire sales quote.
3. Click ▐▶ *Update pricing* ❯ *Keep Manual Changes* ▶ or *Remove Manual Changes*.
4. Save your entries.
5. Click *Preview* to view the pricing details in the sales quote form.

7.7.4 Add New Product Price Elements for Quotes and Orders

Administrators can use adaptation mode to add three additional price elements to the sales quote and sales order product table. The total price elements have been increased to eight to allow for better usability around price details. End users can add these new fields using personalization, if they have been enabled by the administrators.

Define the labels in fine-tune activity ▐▶ *External Pricing* ❯ *Labeling External Pricing Element.* ▶

7.7.5 Calculate Quantity

Estimate the amount of space needed for an order for delivery capacity planning purposes.

Use the calculate quantity action to create a summary of the number of items for each unit of measure. This quantity overview helps identify potential upselling opportunities if there is available space for more products in the same delivery.

Related Information

Use Cross, Up, and Down Selling [page 468]

7.7.6 Check Credit Limit

When processing a sales order, ensure your customers are within their credit limit.

When you simulate or transfer an order, you will see the credit status, credit limit, and credit exposure that has been defined from the SAP ERP system. If the sales order amount exceeds the customer's limit, you will get a warning message.

You can use credit status as a part of approval conditions for your sales order.

Related Information

7.7.7 Request External Pricing with SAP ERP, SAP CRM, SAP S/4HANA

Learn more about how to request external pricing for sales quotes with SAP ERP, SAP CRM or SAP S/4HANA on premise solution.

Your administrator has correctly set-up external pricing. You create a quote, request the pricing from the external system by clicking ▶ *Actions* ❭ *Request Pricing* ❭. Similarly, you can use the action *Simulate* to retrieve external pricing for a sales order.

The external system then simulates a complete document, and you receive the results in your quote or order.

In the solution, you can adapt the following header hidden fields and make them visible for external pricing:

- *Pricing Status* – Only a successfully calculated quote can be submitted.
- *Pricing Date* – A hidden field, also available in internal pricing.
- *Pricing Procedure*
- *Total (Gross)*

On the detailed tab of the sales quote *Products* tab, the following fields are displayed:

- *Product Pricing* – Displays the pricing overview for the selected Product.
- *Total Pricing* – Displays the pricing overview for the complete sales quote.
- *Adjusted Item Price* – Considers item and header price elements
- *Adjusted Item Value* – Considers item and header price element times requested quantity.

> **i Note**
>
> Fields *List Price* and *Product Discount (%)* are not available in the product table for external pricing.

Follow-up Documents

You have an integration with an external system, process your sales orders, and can capture the references to the follow-up documents in the quote. Navigate to ▶ *Sales Documents* ❭ *External Follow-Up Documents* ❭.

If you have scoped external pricing, adapt and translate the condition types and pricing procedures from the external system to your own needs in the *External Pricing* fine-tune activity.

Also, set the *External Pricing* checkbox for the corresponding sales quote document types.

Assignment to External Pricing

If your solution includes integration to an external system and you've chosen to enable external pricing, you can configure the external price elements at the item and header levels for sales quotes to provide quick access to view and edit the pricing data. By configuring these elements, you can also remove the *Product Pricing* and *Total Pricing* tabs from the **Products** tab of the sales quote. Execute these steps to define the configuration:

1. In the fine tuning, go to ▐ *External Pricing* ⟩ *Labeling External Pricing Elements* ▐.
2. Enter the Description for the price elements you plan to use and save your entries.
3. Go to the fine-tuning activity ▐ *External Pricing* ⟩ *Assignments of External Pricing Elements* ▐
4. Add a row for each element you want to assign and select the relevant parameters for each.
   You can either choose or leave blank the **Pricing Procedure** for a particular element. If you leave it blank, users can edit that price element directly in the sales document without first having to trigger the action to Request Pricing from the external system.
5. Save your entries.

7.7.7.1 Configure External Pricing Call

Administrators can learn about external pricing call configuration to retrieve the complete pricing result from SAP on premise systems to your cloud solution.

If external pricing is selected, a synchronous call is required to retrieve the complete pricing result from the SAP on premise system to your cloud solution. Replicated sales documents also require a synchronous pricing update once the sales document is updated during save.

If the document was previously replicate, with this configuration, you can disable the synchronous pricing call to the system,. In addition, you can disable the synchronous call completely, which is also valid for quotes created in your cloud solution. For both configuration options, the pricing status is calculated successfully through the asynchronous call from the external system. The user can still trigger pricing synchronously by clicking the asynchronous call action.

To configure external pricing call, go to fine-tuning activity ▐ *Sales Quotes* ⟩ *Document Types* ▐.

Asynchronous pricing does not expose *Credit Limit*, *Credit Exposure Amount*, or *Credit Exceeding Amount*. If pricing simulation was triggered in the system once for that corresponding pricing procedure, you can add conditions on header and item level. Pricing elements exposed to the item and header are also supported for asynchronous pricing.

7.7.7.2 Enhanced Sales Quote External Pricing Results

Users can expose the *Condition Base Value* and *Condition Pricing Date* in the pricing details of the external pricing result in SAP Cloud for Customer.

The Base Value is transferred to the following:

- *Condition Base Type*
- *Condition Base Value*
- *Condition Base Quantity*

Users must navigate to *Adapt* or *Personalize* to add the condition base hidden fields.

7.7.8 Check Output Pricing to View All Price Components

Administrators can enable the new action *Check Output Pricing* using adaptation mode. This action allows users to view all price components that are available in the output form message as now they are defined as print relevant in the system.

7.7.9 Available to Promise (ATP) Check

Learn about the Available to Promise (ATP) check.

ATP, also referred to as product availability, is the projection of future material stock availability based on the rules in SAP ERP.

From a sales quote, users click ▶ *Actions* ❯ *Request External Pricing* ❯ and the system returns an ATP (Available To Promise) result from the on premise *SAP ERP* system.

> → Remember
>
> The confirmation is non binding based on the *Requested Date* (header date copied to items).

The simulated delivery schedule is displayed and the delivery dates are included in the output message, but not part of the standard print form.

If the product availability quantity and delivery date are not displayed in product table, add them by going to the adapt or personalization mode.

7.7.10 Use Free Goods Determination

Simulate or transfer an order from SAP ERP to view the free goods that are available. With external pricing, you can also trigger free goods determination.

When you simulate or transfer an order, you see the available free goods. If you change products or product quantities in a sales order, free good items are removed and you must simulate or transfer the order again. Free goods determination supports both exclusive (for example, buy ten and get one free) and inclusive (for example, buy 10 and pay only 9) procedures.

> **i** Note
>
> Free good information is read-only and edits are not possible.

7.7.11 Bill of Material Explosion

View the bill of materials from SAP ERP system.

When you simulate or transfer an order, you can view the multi level bill of materials (BoM) explosion from SAP ERP/CRM.

7.7.12 Modify Prices for Sub-Items of a Bill-of-Material

You can change the price conditions for sub-items that are determined in an external application.

It provides the flexibility to maintain agreed prices or discounts on sub-item level of a Bill-of-Material.

> **i** Note
>
> Price adjustments for a BoM are supported on both the header items and sub-items. Quantity adjustments are supported only on header items.
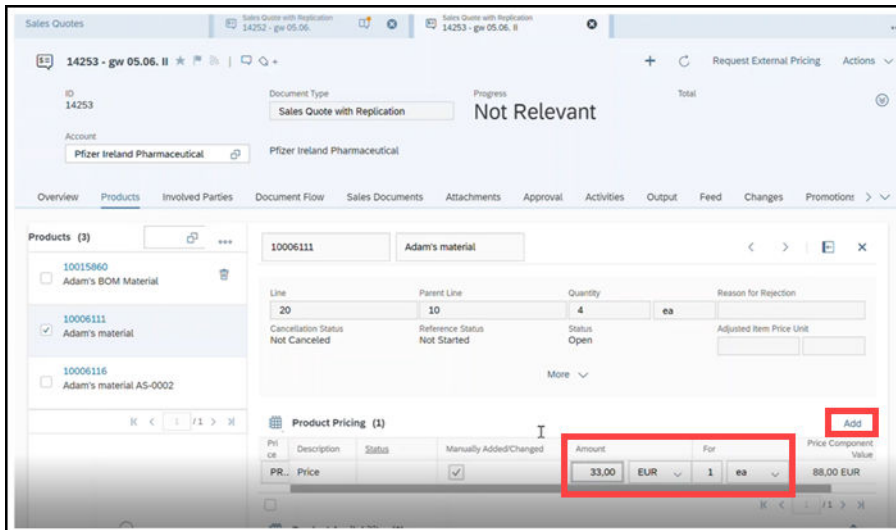
> **!** **Restriction**
>
> Not supported in offline mode.

7.7.12.1 Enable Price Modifications for Sub-Items of a Bill-of-Material

Administrators can learn how to enable price modifications for sub-Items of a bill-of-material.

To enable this feature, go to ▮▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▮▶ *Edit Project Scope* ❭ *Questions* ❭ *Communication and Information Exchange* ❭ *Integration with External Applications and Solutions* ❭ *Integration into Sales, Service, and Marketing Processes* ❭ *Sales Quotes* ❭ and select the scoping question: *Do you want to change sub-items that are determined in an external application?*

7.7.13 Product Substitution

Use product substitution to automatically replace one product that you enter with another one when processing a sales quote.

Administrators customize product substitutions in *SAP ERP* systems.

When users view a sales quote with product substitution, the *Original Product* field displays the exchanged product. Using external pricing call, replaced products are substituted. For example, a substitution is displayed if the initial product entered is out-of-stock.

7.8 Sales Quote and CLM Integration

Learn how to configure and integrate SAP Cloud for Customer sales quotes and CLM.

7.8.1 Configure Cloud for Customer Sales Quotes for CLM Integration

Depending on the selected document type, administrators can integrate CLM directly to SAP Cloud for Customer sales quotes.

> **i Note**
>
> This feature is available as a beta version. To use this feature and add CLM to your scope, create a ticket or contact your SAP representative.

1. Go to the ▌▶ *Business Configuration* ❯ *Implementation Projects* ▐ .
2. Select the current project and click *Open Activity List*.
3. Go to ▌▶ *Fine-Tune* ❯ *Activity: Sales Quotes* ❯ *Maintain Document Types* ❯ *Sales Quote with CLM* ▐ and modify the options accordingly.
4. Add the *Contracts* work center to your scope.
5. Assign the *CLM Administration* view to the key user's business role.

> **→ Remember**
>
> Configure CLM to support features such templates, digital signatures, approvals, terms and conditions, and negotiations (internal and external customer).

> **i Note**
>
> The August 2019 release contains limitations in functionality, they include:
>
> - Missing language support (usage of customer language instead log on language).
> - Missing template determination.
> - Inability to modify or delete templates during the CLM process.
> - No display of detailed item information in tables.
> - No communication to individual customers.

For more information on Callidus CLM, see https://docs.calliduscloud.com/articles/#!contract-lifecycle-management-publication/c4c-integration ↗ .

7.8.2 Integrate Cloud for Customer Sales Quotes with CLM

Based on the selected document type, integrate CLM directly to SAP Cloud for Customer sales quotes.

> i Note
>
> This feature is available as a beta version. To use this feature and add CLM to your scope, create a ticket or contact your SAP representative.

If CLM is selected for a document type, standard sales quote output document submission is disabled for this document type.

1. Open a SAP Cloud for Customer sales quote.
2. To launch CLM, ▶ *Action* ▶ *Open Document* ▶.
3. To assemble an agreement, select a template.
4. Data from sales quote is copied to CLM.
5. Once the CLM document is completed, it is attached to the SAP Cloud for Customer sales quote.

> i Note
>
> The August 2019 release contains limitations in functionality, they include:
>
> * Missing language support (usage of customer language instead logon language).
> * Missing template determination.
> * Inability to modify or delete templates during the CLM process.
> * No display of detailed item information in tables.
> * No communication to individual customers.

For more information on Callidus CLM, see https://docs.calliduscloud.com/articles/#!contract-lifecycle-management-publication/c4c-integration ↗ .

7.9   Sales Quotes Reporting

If configured by your administrator, the following standard reports are provided for sales quotes under
▶ *Analysis* ▶ *Reports* ▶:

* *Sales Quote Volume*: Shows the values in sales quotes. By default, the net values for the current year are displayed.
* *Sales Quote Volume by Account*: Shows the values in sales quotes. By default, the net values for the current year are displayed.

7.10 Maintain Sales Quotes Offline

You work with sales quotes in offline mode with in a limited scope.

Here are useful details for working with sales quotes in offline mode. In offline mode, you can:

- Create, edit, and copy sales quotes.
- Add, edit, and display products, involved parties, attachments (header), and activities.
- View related sales quotes in accounts, individual customer, and contacts.
- View all pricing details generated online from external pricing resulting for sales quotes.

7.10.1 Use Offline Sales Quote Discounts

You can derive estimated prices and provide manual discounts in offline mode to your added products.

7.11 Sales Quotes FAQ

Having trouble using sales quotes? Check this list of questions and answers for help.

7.11.1 How do I version a quote?

Use versioning to keep the existing version numbering and track the referenced quote.

You can create follow-up sales quotes from a sales quote in the *Sales Documents* tab of a quote.

When using sales quote versioning, you copy one version to another to keep the existing version and track the referenced quote. You can also copy a quote by navigating to the quote header and selecting *Copy*. This action does not keep a quote references.

> **i Note**
>
> Changes done in the same quote can be tracked partly in the *Changes* section or in the quote history shown in the *Output* section.

You can also create follow-up sales quotes from a sales quote in the *Sales Documents* tab. This follow-up action allows you to copy one version to another to keep the existing version and track the referenced sales quote. You can also copy a quote, but a copy does not retain the reference to the source sales quote. In any case, the output history allows you to view the versions send to the customer.

7.11.2 How are dates used in sales quotes?

Explore details on dates in sales quotes.

The field *Date* refers to the creation date of the quote. The date is displayed on the print out, is the relevant date for sales quote volume reporting, and is used to derive the *Pricing Date*. Additionally, there is a *Requested Date*, which can be defaulted using the fine-tuning activity *Date Profiles*.

7.11.3 Which currency gets defaulted for a sales quote?

Learn how the solution works with currencies for sales quotes.

The currency defaults from the sales data of the account master record. If no currency is maintained for accounts, the system takes the sales organization currency from the organizational structure (if applicable). Otherwise, it selects the company currency maintained in the organizational model, which is derived from the sales unit in the sales quote

> **i Note**
>
> *Currency*, a hidden field, can be changed in the quote by a user.

> **→ Remember**
>
> Internal pricing requires a currency conversion, which can be maintained in *Products* under the common task *Exchange Rates for Currencies*. If SAP ERP integration is set up, you can replicate exchange rates from *SAP ERP* to *SAP Cloud for Customer*.

7.11.4 How can I default the output settings?

Learn how to set default output settings so that quotes are sent to the desired output.

To send sales quotes to customers and prospects using e-mail, you can set default output settings, for example, from print to e-mail.

Navigate to ▌ *Administrator* ▶ *Channel Output Selection* ▌.

7.11.5 How do you replicate sales quotes to SAP ERP?

Learn about replicating and editing sales quotes to and from SAP ERP, which is only supported with external pricing.

On a sales quote with replication document, the following statuses are available:

- Transfer Status: Not Started, is In Process, Finished

- Reference Status (Follow-up Order created): Not Started, In Process (corresponding to Partially Referenced in ERP, Finished)
- Cancellation Status: Canceled, Not Canceled, Partially Canceled)

Key users can trigger follow-up sales order in SAP ERP for quotes that are replicated bidirectionally in SAP ERP or SAP CRM.

A PDF print of the sales quote (derived in SAP ERP) can be accessed in the document flow.

> i Note
>
> *Transfer Logs* allows you to view details on interrupted transfers and to revoke the transfer of data.

8   Sales Orders

SAP Cloud for Customer can help you reflect and record sales interactions around quotes and orders.
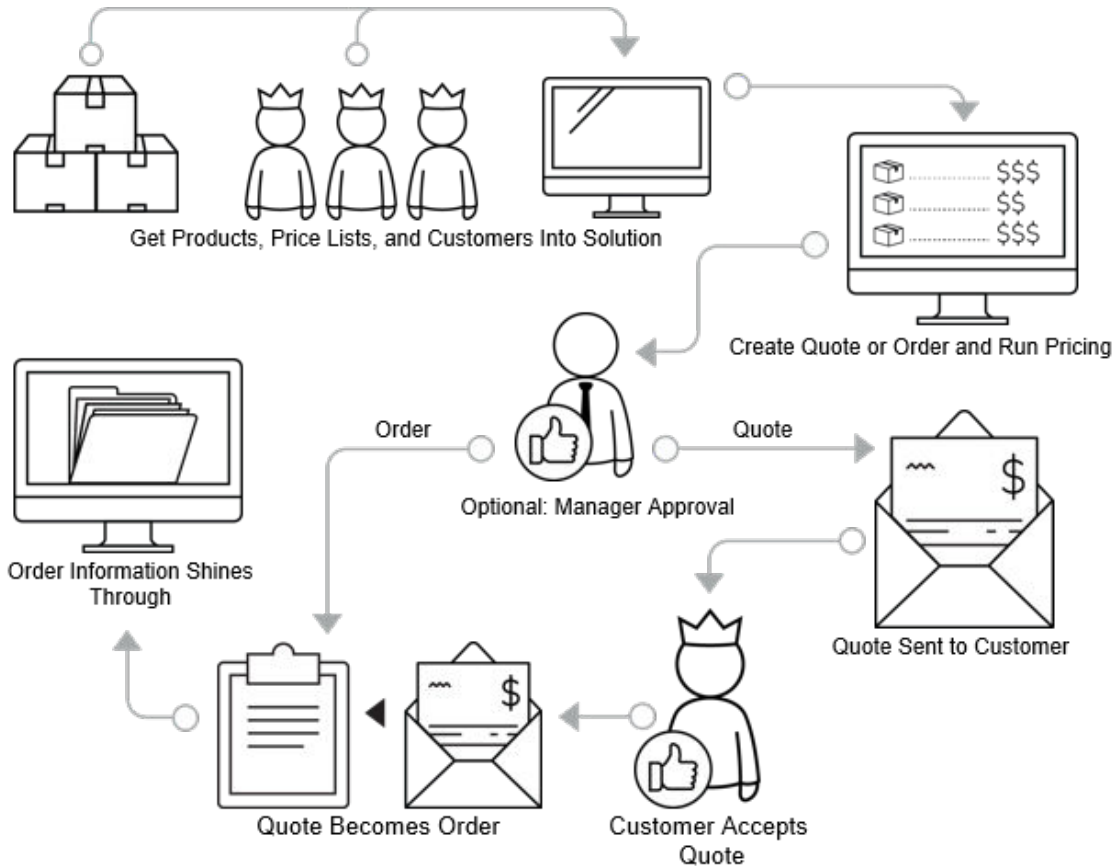
In sales, you have a list of products you want to sell. If you also have a list of customers who are interested in those products, you can take your first steps toward making a sale.

To start, you should have your products in your SAP Cloud for Customer solution. You can either add them all at once or you can add new ones into the solution as you add them to your product line. You can add details, including prices and discounts for certain products.

As you start to get prospective customers interested in your products, you can offer them a quote. You can reuse most of the information from an existing opportunity in the quote, which saves you time and typing. You select the products the customer is interested in and maybe add a couple of cross-selling products or products from a product list tailored to that customer.

When you've defined your products, you can run pricing. Pricing either runs in SAP Cloud for Customer directly or you can use the pricing engine in SAP ERP system. External pricing can trigger an availability check, so you know at this point whether the requested items are available.

If the quote requires approval, you can submit it for approval right in the system. After the quote is approved, it is submitted to the customer in PDF format. If the customer does not accept the quote, you can either change

it and resubmit it to the customer, or indicate that the quote was lost. If the customer accepts the quote, you can indicate that the quote was won.

You can create a sales order right from the quote, which copies all the details from the quote and completes the quote. You can also create orders directly in the solution from a customer visit. Alternatively, you can create the order as a follow-up document in SAP ERP or directly in SAP Cloud for Customer. If you have integrated SAP ERP, you can run pricing, a product availability check, and credit limit check. Sales orders created in SAP Cloud for Customer can be replicated into your integrated SAP ERP system, and sales orders created in SAP ERP can be replicated to SAP Cloud for Customer.

Order information, including delivery and invoice information, is carried through to other areas in SAP ERP and in SAP Cloud for Customer, such as the 360 overview, so you can see it at a glance.

8.1 Scope and Configure Sales Orders

Administrators can configure sales orders using scoping, scoping questions, and fine-tuning activities.

Scoping questions and fine-tuning activities that are straightforward may not be included in this list.

8.1.1 Configure Sales Order Document Types

Administrators can configure sales order document types in the business configuration.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* 〉. Select your project and navigate to ▶ *Open Activity List* 〉 *Fine Tune* 〉 *Sales Orders* 〉 *Maintain Document Types* 〉 and define custom document types. Any custom document type must be created in the 'Z' space (start with letter 'Z').

8.1.2 Configure Involved Parties and Involved Item Parties for Sales Orders

Administrators can configure the allowed involved parties at the sales order header and item level.

Assign party roles, assign a contact and specify whether they are mandatory and unique for the order. Select *Exclude* for *Inbound Integration* if you do not need an inbound ERP integration for party roles. Maintain this assignment under ▶ *Business Configuration* 〉 *Implementation Projects* 〉. Select your project and navigate to ▶ *Open Activity List* 〉 *Sales Orders* 〉 *Maintain Involved Parties ⁄ Maintain Involved Item Parties* 〉.

You can also determine if only the main party role or all parties (for standard and custom party roles) must be determined from the account team, territory team or account relationships. The field *Take Over* (under ▶ *Business Configuration* 〉 *Implementation Projects* 〉. Select your project and navigate to ▶ *Open Activity List* 〉 *Fine-Tune* 〉 *Involved Parties* 〉 *Maintain Determination* 〉) lists three possibilities:

- All parties

- Main party, otherwise arbitrary one
- Only main party

> **i Note**
>
> This feature is not available in the offline determination for involved parties.

> **i Note**
>
> You should have maintained the involved party roles. For detailed information, see .

8.1.3 Configure Pricing Date

Administrators can set the default *Pricing Date* to use in new *Sales Orders* and copied *Sales Orders*.

To ensure accurate pricing data when creating and copying *Sales Orders*, Administrators can configure what date to use as the default *Pricing Date* in a *Sales Order*. Choose how each type of *Sales Order* will be configured based on the following four options:

- *(Current) Date*
  - New Sales Order Pricing Date defaults to the current date
  - Copied Sales Order Pricing Date defaults to the Pricing Date from the original Sales Order
- *(Current) Date Included in Copy*
  - New Sales Order Pricing Date defaults to the current date
  - Copied Sales Order Pricing Date defaults to the current date
- *Requested Date (Header)*
  - New Sales Order Pricing Date defaults to the Requested Date from the header
  - Copied Sales Order Pricing Date defaults to the Pricing Date from the original Sales Order
- *Requested Date (Header) Included in Copy*
  - New Sales Order Pricing Date defaults to the Requested Date from the header
  - Copied Sales Order Pricing Date defaults to the Requested Date from the header

Administrators can go to ▮▶ *Business Configuration* ❯ *Implementation Projects* ▮. Select your project and navigate to ▮▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Sales Orders* ❯ *Maintain Document Types* ▮ to choose the configuration for each type of document.

Example

If today is March 5th and you are copying an existing order with a pricing date of March 1st, the default Pricing Dates for each setting are:

Pricing Date Configuration Example

	(Current) Date	(Current) Date Included In Copy	Requested Date (Header)	Requested Date (Header) Included In Copy
New Sales Order Default Pricing Date	March 5th	March 5th	March 7th	March 7th
Copied Sales Order Default Pricing Date	March 1st	March 5th	March 1st	March 7th

8.1.4 Configure Ability to Modify Sub-Items of Bill of Material

Ability to modify prices or discounts for sub-items of a bill of material.

Maintain and modify prices or discounts for sub-items of a bill-of-material that are determined from an external application. Note that any new features added at the sub-item level will automatically get enabled with this scoping question.

Administrators must configure this feature under ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Communication and Information Exchange* ❯ *Integration with External Applications and Solutions* ❯ *Integration into Sales, Service and Marketing Processes* ❯ *Sales Quotes* ❯ and select the scoping question: *Do you want to change sub-items that are determined in an external application?*

8.1.5 Configure Block Assignment

Administrators can set up block reasons for document types. The block assignments allow you to stop the creation of sales quotes, sales orders, or other transactions for certain accounts considering their sales area.

Procedure

1. Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Accounts* ❯.
2. Select *Sales Document Order Block*.
3. Add a row for each order block reason you want to use to block sales documents and select from the list of document types.
4. Define the following:

   o *Order Block Reason*: Reasons that you would like to use to block sales order creation for accounts

> **i Note**
>
> The blocking reasons that you maintain here are mapped to the blocking reasons configured in an ERP system.

   o *Document Type*: Assign a document type to the order block reasons to enable blocking sales order creation for accounts.
5. Assign the blocks to accounts and block them in the header section of accounts.

8.1.6 Configure External Pricing

Administrators can configure external pricing components.

In this activity, you can add configurable price components to the product table to enable user to manually add some price components from ERP and map them here directly to document types. Go to ▶ *Business Configuration* 〉 *Implementation Projects* ◗. Select your project and navigate to ▶ *Open Activity List* 〉 *Fine-Tune* 〉 *External Pricing* ◗ and define the following:

- **Labeling External Pricing Elements**
  In this activity, you can assign labels to standard pricing elements.
- **Assignments of External Pricing Elements**
  In this step, you can assign pricing procedures and condition types the pricing elements. You enable the following with these assignments:
  o The *Products* table displays the corresponding fields associated with the pricing procedures.
  o The *Product Pricing* table displays the conditions (mapped to the pricing element) per product item.
  o The *Total Pricing* table displays the conditions (mapped to the pricing element) for the complete sales order.

8.1.7 Configure Internal Sales Order Pricing

Administrators can configure pricing options for internal orders.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* ◗. Select your project and navigate to ▶ *Open Activity List* 〉 *Fine Tune* 〉 *Configure Price Strategy* 〉 *Configure Pricing Procedure* ◗ to set your pricing options.

8.1.8 Configure Plant Based Ordering

Administrators can configure plant as an involved party at the sales order header level in the business configuration.

This is a two step process consisting of the following:

1. Go to ▶ *Business Configuration* 〉 *Implementation Projects* ◗. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Integration with External Applications and Solutions* 〉 *Integration of Master*

Data] and select the checkbox against the scoping question: *Do you want to replicate Plants from an external application to your cloud solution?*

2. Go to ⃞ *Business Configuration* 〉 *Implementation Projects*]. Select your project and navigate to ⃞ *Open Activity List* 〉 *Sales Orders* 〉 *Maintain Involved Parties*] and select *Plant* as the involved party. The determination is based on **Accounts** or **Ship-to-Party**.

8.1.9 Configure Approval Process for Sales Orders

Administrators can configure approval processes for sales orders.

Go to ⃞ *Business Configuration* 〉 *Implementation Projects*]. Select your project and navigate to ⃞ *Open Activity List* 〉 *Fine-Tune* 〉 *Approval for Sales Orders*] to define your approval tasks.

Approval workflow for multi-level approvals can also be used to determine the next level reporting managers. If the appropriate approval process and conditions for the approval task are maintained and the defined conditions are met, then the system determines next level reporting manager from the organization structure maintained in your system.

Create approval processes using the three price elements displayed in sales order header level as discounts (or any other price condition).

Multi level approval process must already be enabled in your system. To do this, go to ⃞ *Business Configuration* 〉 *Implementation Projects*]. Select your project and navigate to ⃞ *Edit Project Scope* 〉 *Questions* 〉 *Sales* 〉 *New Business* 〉 *Sales Orders*] and select the scoping question: *Enable multi-level approval for sales orders?*

8.1.10 Configure Sales Order Approval Via E-Mail

Administrators can configure sales order approval via e-mail with scoping activities.

Before using approval via e-mail, ensure the following:

- The involved employees are business users and have valid e-mail addresses, and that the CA certificates from the employees are uploaded to the system for outgoing e-mails.
- The involved employee are subscribed to the e-mail notifications by opening the *Notifications* view and choosing *Subscribe to E-Mail*.
- The e-mail clients of the involved employees have enabled the receipt of encrypted e-mails.

Go to ⃞ *Business Configuration* 〉 *Implementation Projects*]. Select your project and navigate to ⃞ *Edit Project Scope* 〉 *Questions* 〉 *Built-in Services and Support* 〉 *System Management* 〉 *Security*] and check the box for the encryption and signatures in e-mail question.

Scoping Questions for Enabling Automatic Approval Processes

Business Object	Navigation in System	Scoping Question
Campaigns	▌▶ *Sales Campaign* ❯ *Campaign Management* ❯ *Campaign Execution* ❯	```Do you want to use a multi-step approval process for campaigns?```
Opportunities	▌▶ *Sales* ❯ *New Business* ❯ *Opportunities* ❯	```Do you want to use a multistep approval process for opportunities?```
		```Do you want the system to automatically submit an opportunity for approval?``` **i Note** This question is optional and only relevant if you want trigger automatically an approval for your opportunities if the entered data fulfill the defined criteria.
Sales Quotes	▌▶ *Sales* ❯ *New Business* ❯ *Sales Quotes* ❯	```Do you want to use a multi-step approval process for sales quotes?```
Tickets	▌▶ *Service* ❯ *Customer Care* ❯ *Service Request Management* ❯	```Do you want to use a multi-step approval for tickets?```
		```Do you want to automatically submit tickets for an approval workflow after one or more specified conditions are fulfilled?```
	▌▶ *Service* ❯ *Employee support* ❯ *Ticket Management* ❯	```Do you want to use a multi-step approval for tickets?```

Business Object	Navigation in System	Scoping Question
		Do you want that the system submits automatically a ticket for approval?
		i Note
		This question is optional and only relevant if you want trigger automatically an approval for your tickets if the entered data fulfill the defined criteria.
Contracts	▶ *Service* ❯ *Entitlement Management* ❯ *Service Contract Management* ❯	Do you want to use a multi-step approval for service contracts?
E-mail Notifications - E-mail encryption and signature	▶ *Build-in Services and Support* ❯ *System Management* ❯ *Security* ❯	Do you want to use encryption and signature for e-mails?

8.1.11 Configure E-Mail and Fax Settings for E-Mail Notifications

Administrators need to specifiy the company domain for e-mail notifications.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *E-Mail and Fax Settings* ❯.

Enter your company domain, such as `example.com`, as the *Allowed Sender E-Mail Domain*.

8.1.12 Configure S/MIME for E-Mail Notifications

Administrators can upload certificates needed for e-mail notifications for all employees.

Context

To enable e-mail notifications, upload the CA certificates in this area for the e-mail address for generic business task management for all involved employees and managers.

Procedure

1. Choose ▌▶ *Administrator* ❯ *Common Tasks* ❯ *Configure S/MIME* ▌.
2. On the *Incoming E-Mail* tab, upload the CA certificates from all involved employees for the generic incoming e-mail address *Business Task Management Email Notifications*.
3. On the *Outgoing E-Mail* tab, install the system CA certificate in the e-mail client of the involved employee as follows:
   a. In the *SAP Trust Center Service* column, click *Link to SAP CA* to open the *SAP Trust Center Service*.
   b. On the *Root Certificates* section of the screen, click *SAP Passport CA Certificate*. A popup opens.
   c. Click *Install Certificate...* and follow the wizard by clicking *Next >*.
   d. Select *Place all certificate in the following store* and click *Browse....*
   e. Select *Trusted Root Certification Authorities* and click *OK* and then *Next >*.

   Now the CA certificate from the system is installed locally.
4. Now activate the S/MIME on the *Activate S/MIME* tab select the options for *Check Signature of Incoming E-Mails*, *Encrypt Outgoing E-Mails* (optional), and *Signing Outgoing E-Mails*.

8.1.13 Configure Custom Keyboard for Order Taking in Offline

Administrators can configure a custom configured keyboard for smartphones.

Sales representatives can use this custom configured keyboard in smartphones for swift order taking in offline. Note that this keyboard is already available in online.

Configure the feature under ▌▶ *Administrator* ❯ *Sales and Campaign Settings* ❯ *Sales Documents* ❯ *Configure Preferences for Sales Documents* ❯ *Enable New Product Entry UI in Smart Phones* ▌.

8.2 Create Sales Orders

You can use SAP Cloud for Customer to enter your orders, confirm them when you receive accurate pricing and availability information, and transfer them to the ERP system for future processing.

Orders can be created in the following ways:

- As a follow-up to a visit, sales quote, opportunity
- Directly from the quick create icon on the home screen or the sales order view under sales tab.
- Copying an existing sales order

> ⚠ Caution
>
> You will notice a decreased system performance when working with sales quotes or sales orders exceeding 500 products. Adding products to the sales document affects the performance of all item-related functions, such as pricing, output, or transfer to external systems.

Maintain Sales Order Document Types [page 522]

Sales order document type templates allow you to support various business scenarios.

8.2.1 Maintain Sales Order Document Types

Sales order document type templates allow you to support various business scenarios.

Define templates that you can use to predefine maintenance mode, whether asynchronous pricing is valid (available only for a combination of external and internal modes), pricing date, contract determination and values for item increment. Standard order (OR) document type is shipped with standard system. Create custom document types in the 'Z' space.

8.2.1.1 Configure Sales Order Document Types

Administrators can configure sales order document types in the business configuration.

Go to ▶ *Business Configuration* ❭ *Implementation Projects* ❳. Select your project and navigate to ▶ *Open Activity List* ❭ *Fine Tune* ❭ *Sales Orders* ❭ *Maintain Document Types* ❳ and define custom document types. Any custom document type must be created in the 'Z' space (start with letter 'Z').

8.2.2 Sales Order Types

Depending on your system setup, you have different types of sales orders.

- **External and Internal**
  This is the default mode and allows sales order creation and bi-directional transfer of sales orders between the cloud solution and SAP ERP.
- **External Only**
  This mode supports **Display Only** of sales orders that are created in external system and displayed in the cloud solution.
- **Internal Only**
  These orders only exist within SAP Cloud for Customer and do not support the *Simulate* and *Transfer* features or the use of SAP ERP. The orders of this type can only be previewed, printed and sent by e-mail.

You can edit orders in the SAP Cloud for Customer system as long as they are not in completed or canceled status.

> **i Note**
>
> For orders created with ERP, additional rules may apply.

8.2.3 Add Products to a Sales Order

Select products to add to your sales order based on previous orders, product lists, and product proposals.

When you create an order from within a visit or an account, the initial form data is prepopulated with information (such as relationships, sales org data, payment terms, and so on) from that visit/account.

Sales order also supports search and add by *Barcode Scanning*, using the device camera or certain external devices, for a speedy order capture.

8.2.3.1 Add Products to Sales Orders

Optimize the order entry process.

When you create a new sales order, select *Add Product*. The *Add Product* screen may be pre-populated with products via automatic proposals, if configured by your administrator. Additionally, it offers product selection

with a quick product search help and mass product additions via options such as *Product Lists*, *All Products*, *Past Orders* and *Promotions*.

Click the *Products* tab and then click *More* to find these options:

- *Add From All Products*: In this option, all products in different product categories valid for the sales area in the sales order are displayed for selection.
- *Add from Product List*: This option includes groupings of products valid for the account if enabled by your administrator.
- *Add from Promotions*: In this option, all products from valid promotions for the customer are displayed for selection. Choose the products you want to add, enter a quantity, and add them to your sales order. Finally, when you save the order and retreive pricing, the promotional pricing gets applied.

  > **i Note**
  >
  > You only see promotions with *Released* status in the *Sales Order* tab.

- *Add from Past Orders*: This option allows you to choose products from historical orders placed for that particular account or by you. The past orders are split by the different query variants available.
  - *My Past Orders* displays the list of all past orders created by you. The *Account Sales Orders* option displays list of all sales orders for the given account. The *My Past Orders for Account* option displays list of all sales orders created by you for the given account.
- *Add from Combined Lists*: This option allows you to choose a combination of products from product lists, product proposals and promotions.

  > **i Note**
  >
  > For a restriction or proposal type product list that has no direct products but has a category assigned, the products are not displayed in the combined list.

- *Barcode Scanning*: Add products using barcode scanner. The scanned products are automatically added to your selection. When you click on the barcode scanner icon, the camera loads allowing you to capture the barcode. Note that barcode scanning is only available if you are using the Extended Edition app for the solution.
- *Quick Add Products*: The quick add screen is available from *Add Product* when you launch a new sales order or from the *Products* tab in the sales order. For detailed information on the Quick Add Products feature, see documentation in the next topic **Quick Add Products**.

> **i Note**
>
> - These options are available even after you have saved a sales order. From within an existing sales order, you can access this screen by selecting *Quick Add Products* under *Products*.
> - If you have flexible offline pricing setup, you can see the price per unit of measure for all products when selecting them in the product selection buckets. This is available in both online and offline modes.

8.2.3.2   Use Quick Add Products to Add New Products

Dynamically add new products using field help in the *Product* column or directly enter product ID. It is also possible to edit already existing products. Navigate to product master data using the icon next to the field.

The quick add of products is available from the quick create screen of a new sales order or using the *Quick Add Products* in the *Products* tab within the order. All actions are enabled as icons on the toolbar above the table. These include *Mass Add Products*, *Remove Zero Quantity Items*, *Calculate Quantity*, and *Copy and Paste*.

> **i Note**
>
> These preference settings are enabled by default. To disable the new settings and use the previous settings, select the checkbox for *Disable Additional Usability Options* under ▐▶ *Administrator* ▶ *Sales and Campaign Settings* ▶ *Sales Documents* ▶ *Configure Preferencs for Sales Documents* ▮.

When you add multiple products at one go, the sequence of products is retained in the quick order entry screen.

Use the *Product ID* column to add products using external or internal product ID. This column is enabled with value help and you must select a product from the product search.

Use the *Product ID (No suggestions)* column to add products using the Sales Cloud internal product ID. This column does not trigger a product search on entry of the product ID.

> **i Note**
>
> Only one of the columns is enabled.

8.2.3.3 Use Search and Add Text Box to Add Products

The *Search & Add* text box is available in the fast order entry screen and under the *Products* tab.

The logic works as described below:

- The searched product is automatically added to the product list (as top row in the table) if it is not in the list.
- If the searched product exists in the table, then the relevant row is highlighted for identification.
- If the existing products are on different pages, the same are also highlighted.

8.2.3.4 Mass Copy of Products Using Ms Excel (Fiori Client Only)

Add multiple products at a time by copying from MS Excel and pasting it in the product table. A new UI element - *Paste* is provided under *Products* tab and in the fast order entry screen to support copy and paste from excel.

The feature not only enables copy and paste, but also validates the copied quantities with the minimum order quantity configured for the order. For example, if the quantity for a copied product is more or less than the minimum order quantity, the particular row in the table is highlighted for correction.

> **i Note**
>
> The order of columns in your MS Excel sheet must match the order in your UI. Additionally, as in Excel, the number of input fields must not exceed the maximum column fields exposed.

8.2.3.5 Add Products Using Barcode Scan of Product IDs

Add products using barcode scanning generated from product IDs This is in addition to GTIN based barcode scanning for adding products. Therefore, you can choose to scan and search for products using either product IDs or GTINs.

8.2.3.6 Configure Barcode Scan Using Product IDs

Administrators can configure barcode scanning using product IDs by selecting the scoping question.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* 〗. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Sales* 〉 *Product and Service Portfolio for Sales* 〉 *Sell Standard Products* 〉 *Product Barcode Scan* 〗 and select the scoping question: *Search products based on product id when scanning products*

8.2.3.7 Set Default Product Quantity

Set the default product quanity to '0' if you need to maintain a series for the added products or you want to maintain products in multiples.

If no other proposed quantities are available, you can also use the increment counter to maintain product quantity, This option is particularly helpful for improved usability performance on mobile devices. You can now choose to set default quantity to '0' by selecting the relevant scoping question.

8.2.3.8 Configure Default Product Quantity

Administrators can maintain configuration to set default product quantity to zero.

Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Product and Service Portfolio for Sales* ❯ *Sell Standard Products* ❯ *Product Quantity Default* ▌ and select the scoping question: *Do you want to change the product quantity default in sales documents from one to zero?*

8.2.3.9 Use Order and Item Weight Aggregation

If you have maintained *Product Net Weight* and *Gross Weight* in product master data, this information is used to calculate *Order Item Weight* and *Total Order Weight* in SAP Cloud for Customer.

As you work with the order, for example change quantities, the weight aggregation happens automatically and on simulation, the same data is updated in SAP ERP using calculations in SAP ERP system. At the header level, the aggregation is shown in the highest unit of measure (UoM).

> **i** Note
>
> Key user must add the fields *Net Weight*, *Gross Weight* or *Volumne* in sales order header and item using adaptaion.

8.2.3.10 Configure Exclusion of Item Types for Weight Aggregation

Administrators can maintain the configuration to exclude item types from weight aggregation.

You may want to exclude item types from weight calculation, for example in free goods scenario where you do not want to aggregate weight.

To enable this feature, go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Open Activity List* ❯ *Sales Orders* ❯ *Maintain Item Types* ▌ and select the flag: *Not Relevant for Weight Calculation* for item types.

If the base item type is already not weight relevant, this option is disabled. Make sure that the configuration for item types matches with the corresponding customizing in SAP ERP system.

8.2.3.11 Copy of Product Line Item in Sales Orders

Use the copy action to copy an entire line item in a sales order.

8.2.3.12 Use Quantity Conversions for Minimum Order Quantities

Automate quantity conversions for minimum order quantities in sales orders.

If you've set a *Minimum Order Quantity* for a product in the product master data, the system validates the quantity and displays an error message if the minimum quantity hasn't been met. For products with multiple *Units of Measure*, you can set a *Quantity Conversion* in the product master to ensure that the minimum order quantity check is still valid for each *Units of Measure*.

Quantity conversions are also calculated when offfline.

Example

- If the *Minimum Order Quantity* = 22 each
- And the *Quantity Conversion* is 1 batch = 10 each
- Then the *Minimum Order Quantity* with *Quantity Conversion* = 22 each or 3 batches.

8.2.3.13 Calculate Quantity

Use the calculate quantity action to create a summary of the number of items for each unit of measure.

This summary can help identify potential upselling opportunities if a specific quantity needs to be met for a promotion.

Related Information

8.2.3.14 Maintain Delivery Priority at Item Level

Define the delivery priority at item level using the *Delivery Priority* column in the products table.

8.2.3.15 Use Item Types in Sales Orders

Item types allow you to process items based on SAP ERP logic for external pricing and integration.

You can use item types to apply manual discounts to internal and external orders.

8.2.3.16 Configure Item Types

Administrators can configure item types and also set them as a free sample or free good so that pricing is not affected.

Define your own item types to reflect your company practices. Administrators can go to ▶ *Business Configuration* ▶ *Implementation Projects* ▶. Select your project and navigate to ▶ *Open Activity List* ▶ *Fine Tune* ▶ *Sales Orders* ▶ *Maintain Item Types* ▶ to choose the configuration for each item type.

Item types determine how an item category behaves in a sales document. Item item types are not necessary, but are relevant if you replicate orders with an on premise system and administrators should remember to configure document types.

You can define alternative item types for the item types delivered in the standard solution. These alternative item types are then displayed for the corresponding items under the *Products* tab for sales orders. You can use these custom item types to process items based on SAP ERP item categories. You can also use item types for, in order simulations to retrieve external pricing.

To set an item type as a free good, select the flag - Administrators can define items as a free sample or free good so that pricing is not affected.When an item that is not relevant for pricing is added to a order, it will not contain a price. However, you can still add a price for this product manually.

> **i Note**
>
> This *Not Pricing Relevant* item type is available in external pricing and offline pricing sales orders. You can still add a price for this product manually.

8.2.3.17 Configure Ability to Modify Sub-Items of Bill of Material

Ability to modify prices or discounts for sub-items of a bill of material.

Maintain and modify prices or discounts for sub-items of a bill-of-material that are determined from an external application. Note that any new features added at the sub-item level will automatically get enabled with this scoping question.

Administrators must configure this feature under ▌▶ *Business Configuration* ❯ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Edit Project Scope* ❯ *Questions* ❯ *Communication and Information Exchange* ❯ *Integration with External Applications and Solutions* ❯ *Integration into Sales, Service and Marketing Processes* ❯ *Sales Quotes* ▌ and select the scoping question: *Do you want to change sub-items that are determined in an external application?*

8.2.3.18 Define Item Increment Per Document Type

Administrators need to define item increment numbers, which allow you to control *Item Increment* and *Sub Item Increment* ranges.

Increment configuration eliminates limitations for bill of materials (BOM) explosion when there are many *Sub Items* in external pricing. Define item increments under ▌▶ *Business Configuration* ❯ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Open Activity List* ❯ *Fine Tune* ❯ *Sales Orders* ❯ *Maintain Document Types* ▌.

8.2.3.19 Validation Check for Minimum Order Quantity

Minimum order quantity is sales area dependent; Administrators can maintain this value in the product master data.

The system validates the quantity and displays an error message if the minimum quantity hasn't been met. For products with multiple units of measure, you can also set a quantity conversion to ensure that the minimum order quantity check is still valid for each unit of measure. If the validity check fails, the system displays an error message. To override this message, enter a value equal to or greater than the minimum quantity and save your entries.

8.2.3.20 Set a Product List Sequence for Sales Orders

Define a sequence for products in *Product List* that is applied in a *Sales Order*.

Context

You can choose the sequence in which products are displayed in a *Product List*. The sequence that you choose in your *Product List* is applied to the list of products in a *Sales Order*. When adding products to an order, use *Quick Add Products* then *Add From Product List* to use this feature.

When you add products to a *Sales Order* from multiple *Product Lists*, the sequence of the products in each list is reflected in your *Sales Order*. Each item is given new sequence values in the order to reflect this sequence. The sequence of the *Product Lists* in the *Quick Add Products* screen is also reflected in your Sales Order when adding multiple products from multiple *Product Lists* at the same time.

> → Tip
>
> If you want products from individual *Product Lists* to show up in a specific sequence in your order, add products from one *Product List* at a time using the *Add Products*. For example, when you select products from List A and click *Add Product*, and do the same for Product List B, C, and D, in your order you see orders from List A in their set sequence followed by items from List B, C, and D in their set sequence.

> i Note
>
> Products in the *Quick Add Products* screen appear in reversed order. Once you save and open your order, products are listed in the correct order.

Procedure

1. Open a *Product List*, and under *Proposed Products*, add the hidden field *Sequence* to view the sequence values.
2. Go to *More* and select *Renumber* to edit your sequence.
3. Enter any numerical value in the *Sequence* column.
4. Once you've saved the new values, the system automatically reorders the list based on the number values in this column.

8.2.3.21 Retain Product Sequence from Past Orders When Using the Quick Add Products Screen

When you add products from past sales orders, the sequence of products is reflected in the new order.

When you add products to a sales order from past orders in the quick add products screen, the sequence of the products within the past order is retained in the new sales order. If you add products from multiple orders, the sequence within each order is retained in the new order.

Example

In the quick add products screen, the past orders are listed by creation date, with the latest products first. In your past orders, you have past order A, past order B, and past order C. You add three products from past order A, four products from past order B, and two products from past order C. In your new sales order, the three products from past order A will be listed in the same sequence set for the past order, followed by the four products from past order B in the same sequence set for the past order, followed by the two products from past order C in the same sequence set for the past order.

8.2.3.22 Select Multiple Products Assigned to the Same GTIN

Select from different products assigned to the same GTIN.

For scenarios where multiple products are assigned to the same GTIN, it is possible to select from a list of products that share the same GTIN. This is valid for order entry using barcode scanning or while searching for products using GTIN. To avoid a GTIN conflict, you can now select one product from the list of products with the same GTIN. Similarly, when searching for products, the system displays a list of products that matches the GTIN; you can select one product from the results list.

8.2.3.23 Use Combined Lists to Add Products from Multiple Product Lists or Promotions

Search across all product lists or promotions for an account.

When you click *Combined Lists* in the order entry screen, you can select the appropriate category for *Product Lists* or *Promotions*. In the search results, the products are listed along with the name of product list or promotion.

> **i** Note
>
> 1. A product appears only once in the search results even if it is assigned to multiple product lists or promotions.

2. This feature is available both in online and offline.

8.2.3.24 Add Products to Sales Orders by Default With Automatic Proposals

If your administrators have selected the flag - *Automatic Proposal* when configuring product lists, then products are added to sales orders by default.

Related Information

https://help.sap.com/viewer/DRAFT/24765b551a014b779b95c7b07d8e9079/1808/en-US/6c33d68751ae492fb2128ecd36d06f64.html

8.2.3.25 Use Extension Fields in Product Search in Combined Lists

Extension fields to enhance product search in combined lists.

You can now use custom fields to search and filter for products within a combined list. These custom fields can belong to product header or product list header. The new filters with custom fields can be added to product lists, past orders as well as plant options.

> i Note
>
> Administrators must create the necessary extension fields using SAP Cloud Application Studio and then add these to the filters using adaptation mode.

8.2.4 Block Sales Orders Based on Account Blocks

Block specific accounts from creating sales orders.

If accounts have been blocked, you cannot create a sales order for those accounts. If you try to create a quote or order, an error message with the order block reason is displayed.

8.2.4.1 Configure Block Assignment

Administrators can set up block reasons for document types. The block assignments allow you to stop the creation of sales quotes, sales orders, or other transactions for certain accounts considering their sales area.

Procedure

1. Go to ▐▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▐▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Accounts* ❯.
2. Select *Sales Document Order Block*.
3. Add a row for each order block reason you want to use to block sales documents and select from the list of document types.
4. Define the following:

    ○ *Order Block Reason*: Reasons that you would like to use to block sales order creation for accounts

    > **i Note**
    >
    > The blocking reasons that you maintain here are mapped to the blocking reasons configured in an ERP system.

    ○ *Document Type*: Assign a document type to the order block reasons to enable blocking sales order creation for accounts.
5. Assign the blocks to accounts and block them in the header section of accounts.

8.2.5 Determine Involved Parties for Sales Order Header and Item Level

Determine involved parties for sales orders using party roles and the applicable determination rules.

Use the *Involved Parties* tab from within a sales order to add and determine further involved business partners (parties), such as partners or competitors into your sales orders. The *Involved Parties* tab allows to change the address for parties and contacts to a *Document Address* which is a one-time address. This address does not change master data and is only applicable for the document processing itself.

Streamline team assignments and ensure that business partners are correctly assigned to business documents in accordance with your company needs.

Example

You can create a sales order and add an account as the ship-to party. In this example, the account is the business partner, and ship-to is the party role. The ship-to account may be a subsidiary of a parent company, which is a different account. You may have the parent company account as the bill-to party.

8.2.5.1 Configure Involved Parties and Involved Item Parties for Sales Orders

Administrators can configure the allowed involved parties at the sales order header and item level.

Assign party roles, assign a contact and specify whether they are mandatory and unique for the order. Select *Exclude* for *Inbound Integration* if you do not need an inbound ERP integration for party roles. Maintain this assignment under ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Open Activity List* ❯ *Sales Orders* ❯ *Maintain Involved Parties /´Maintain Involved Item Parties* ❯.

You can also determine if only the main party role or all parties (for standard and custom party roles) must be determined from the account team, territory team or account relationships. The field *Take Over* (under ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Involved Parties* ❯ *Maintain Determination* ❯) lists three possibilities:

- All parties
- Main party, otherwise arbitrary one
- Only main party

> **i Note**
>
> This feature is not available in the offline determination for involved parties.

> **i Note**
>
> You should have maintained the involved party roles. For detailed information, see .

8.2.5.2 Use Work Distribution Rules for Party Role Determination

Determine party roles for orders using the work distribution rules.

To use this feature, go to ▶ *Administrator* ❯ *Sales and Campaign Settings* ❯. Under *Work Distribution* choose *Define Rules for Sales Order Parties*.

8.2.5.3 Assign Custom Party Roles in Quick Create and Overview

Use custom party role assignments for orders in the quick create and *Overview* tab in the detailed view.

8.2.5.3.1 Configure Custom Party Roles in Quick Create and Overview

Administrators can enable using custom party roles such as a distributor during order create. It is possible to add upto three custom party roles to the order creation screen (quick create and overview).

To configure, first define the required custom party roles and under *Assign Party to UI*, select the *Header Party Element* for the role. Maintain this configuration under ▶ *Business Configuration* ❯ *Implementation Project* ❯. Select your project and navigate to ▶ *Open Activity List* ❯ *Sales Orders* ❯ *Maintain Involved Parties* ❯.

8.2.6 Other Actions Supported in Sales Orders

View the details of a sales order and related activities.

8.2.6.1 Create Order for Ship-to-Party from Visits

Create orders for your ship-to-party visits with the toolbar action *Create Ship-To-Party Order*.

When you create a follow-up order from the visit, this action defaults the ship-to-party in the order instead of the sold-to-party. This feature enables you to quickly default involved parties in an order and speed-up your order taking process.

> **i Note**
>
> This feature is available only in the Fiori client.
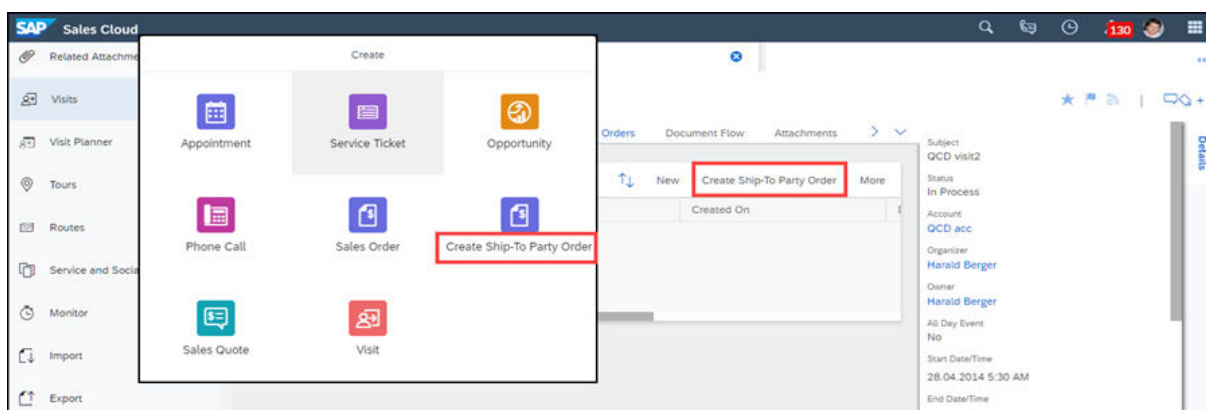
8.2.6.2 View Change History for Sales Orders

View a record of the changes made to a sales order.

In the *Changes* view within a sales order, you can see detailed information about the changes that have been made to the order. You can see who made the changes, what the changes were, and when they were made. You can also use the search fields to find changes made during a specific timeline, changes made by a specific user, or changes made based on attributes.

8.2.6.3 Search Sales Orders

Quickly find sales orders based on predefined or custom search requirements.

Use the dropdown menu to view predefined categories such as 'My Orders' or 'Orders for My Territories.' You can enter a specific search term by using the magnifying glass icon that will search the category you've chosen in the dropdown menu.

Select the filter icon to access the advanced search which includes the option to search by additional attributes.
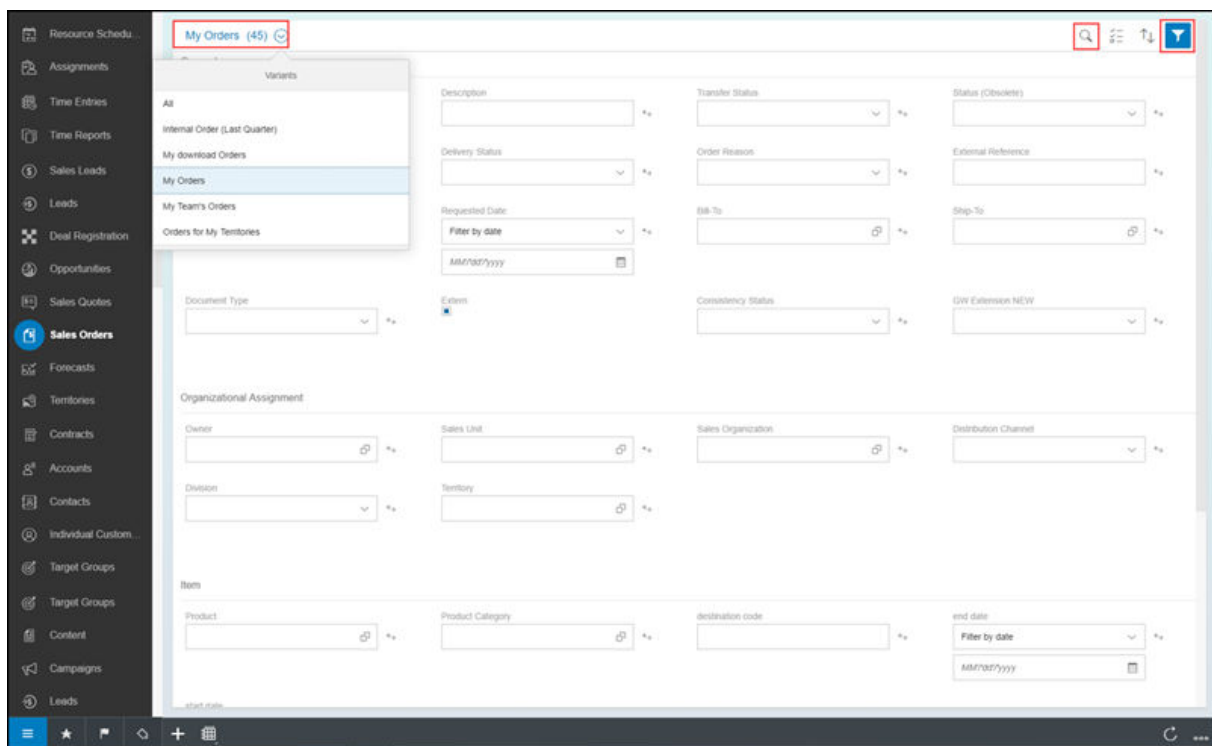
8.2.6.4   Track Activities Related to Sales Orders

Track all activites related to a sales order in one place.

Manage activities, such as appointments, tasks, phone calls, and e-mails from within a sales order. Activites can be viewed and created directly from a sales order so you can easily follow-up with your customers. All activities related to a sales order can also be viewed in the *Document Flow* tab.

Activities can also be viewed in the document flow.

8.2.6.5   Add Attachments to Sales Orders

Upload a web link or local file to your sales order.

You can add and delete attachments to your sales orders. Any updates that you make to attachments in the cloud solution will be reflected in the sales order in the external system and vice-versa.

> **i Note**
>
> The graphical signatures that are captured will be stored as attachments in this screen. You can click on the hyperlink to view the signature.

Related Information

8.2.6.6   Create Follow-Up Ticket for Sales Orders

You can create a ticket from the Tickets view within a sales order or from the More menu in the Products view.

8.2.6.7   Edit Work Lists

Sales Order worklists are enabled for mass editing.

You can enable editing the worklist by clicking the user profile and clicking ▶ *Settings* ▶ *Company Settings* ▶ and turning on the toggle button for the company setting *Enable Editing in Dataset in Fiori Client* .

You can edit the following fields in Sales Orders:

- Account
- Reason for Rejection
- Order Reason

- External Reference
- Description
- Delivery Priority
- Incoterm
- Incoterm Location
- Opportunity
- Campaign
- Primary Contact
- Creation Date
- Pricing Date
- Requested Delivery Date
- Owner
- Ship-To
- Bill-To
- Territory
- Sales Unit
- Sales Group
- Sales Office
- Distribution Channel
- Division

8.2.6.8   View Feed for Sales Order

Get updates on sales orders posted to the feed.

Go to your *Feed Settings* to configure the types of updates to sales orders you want to see in your feed. You can follow the changes made to sales orders like owner change or approval.

8.2.6.9   View New Layout for Products and Involved Parties in Sales Orders

View a vertical split-screen layout for products and involved parties details.

In a sales order under the *Products* or *Involved Parties* tab, select ⬚ to view the master list and item details on one screen. On the left use the list to easily switch between items. When you select an item in the list, view the details for the selected item on the right. In the upper-right corner, use the collapse icon to collapse and expand the list on the left. Close the split-screen view by selecting the X.

> **i Note**
>
> Adminstrators can disable this view by going to ▌ *Adapt* 〉 *Company Settings* ▐ and selecting the checkbox for *Disable Vertical Split View for Master-Detail in Sales Order*. However, after the 1902 release, the vertical split-screen view will be the default view, and you won't be able to disable it.

8.2.6.10   View History and Status of E-Mails Sent From Sales Orders

View details such as date sent, recipient, and status of e-mails sent from a sales order.

In a sales order, you can use ▌ *Actions* 〉 *Send E-Mail* ▐ to send an e-mail directly from the sales order. Under ▌ *Activities* 〉 *Send E-Mail Action History* ▐, view all e-mails sent by using this action and the status.

> **i Note**
>
> Under *Activities* for a sales order, the *E-Mails* section shows the e-mail activities created in reference to the sales order and any e-mails sent via workflows for notifications. The *Send E-Mail Action History* only shows e-mails sent by using ▌ *Actions* 〉 *Send E-Mail* ▐ in your SAP Cloud for Customer system.

8.2.6.11 Use Enhanced Insights From Past Order History

The *Past Orders* hyperlink is both in online and offline displays a host of insights for past orders, both completed and historical orders.. This feature is available in the past order column under order items.

In the online, the table displays chronology of all historical orders including completed past orders. The graphical analysis for completed orders has been enhanced and you can now displays three variables on the X-axis: *Requested Item Quantity*, *Item Net Amount* and *Item Net Price*. On the Y axis, unit increments in 1000s are displayed.

In the offline, the table displays a list of all previous orders, along with totals and quantities ordered.

8.2.7 Cross, Up, and Down Selling in Sales Orders

Use pre-defined settings to encourage cross, up, and down selling when creating sales orders.

When you create a sales order, you have the opportunity to increase your sales but upselling and cross selling additional products. You can also help customers transition to new or other products by downselling those that may be discontinued or unfavorable.

Cross Selling

Use the *Recommended Products* section in the *Products* tab of a sales order to quickly added complementary products to your sales orders when the opportunity presents itself.

Up and Down Selling

In the *Products* tab of a sales order, an icon next to a product will signify if up or down selling is available for the product. Use product lists to define up and down selling opportunities.

8.2.7.1 Create Product Lists for Cross, Up, and Down Selling

Learn how to create cross, up, or down selling product lists types, allowing users to select from those products in a sales quote or sales order.

1. Navigate to ▐▶ *Products* ▶ *Product Lists* ▶ *New* ▐.
2. Select the *Personalize* or *Adapt* menu to modify the screen layout.
3. Click the plus sign (+) to add the *Type* field and save your changes.
4. Exit the personalization or adaptation mode.
5. Select the product proposal *Type* such as up, down or cross.
6. Add products by clicking ▐▶ *Proposed Products* ▶ *Add* ▐ and enter a product name or ID.

> **i** Note
>
> In the newly created product list, the *Required Products* tab appears. For other product lists types, addition tabs may also appear. For example, the *Excluded Products* tab appears when creating new product exclusion list types.

7. Choose the type of desired proposed products, for example, *Cross Selling*, *Down Selling*, *Up Selling*.

8.2.7.2   Display Registered Products in Sales Order

Display registered products and use advance search to view them in the new tab - *Registered Products*. The main registered product is also displayed in the order overview. Following fields are displayed: *Product ID*, *Product Description*, *Serial ID*, *Registered Product Description*
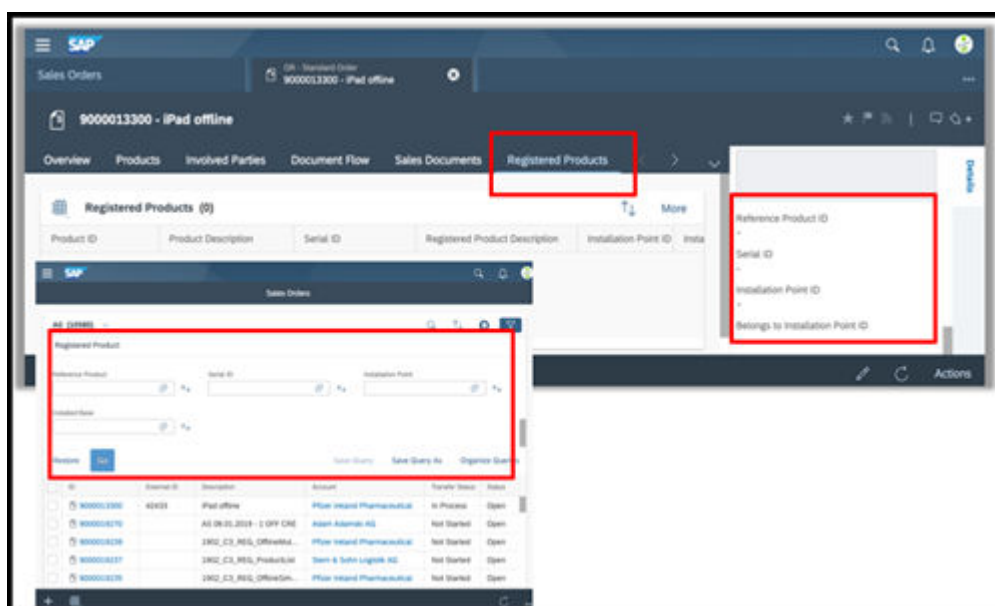
8.2.8 Use Internal Pricing for Sales Orders

Use internal pricing for sales orders of maintenance mode - *Internal* and that are not integrated with SAP ERP system. To use internal pricing, maintain price lists and customer-specific price lists, along with discount lists and a single pricing procedure.

Few features of internal pricing are listed here:

- Allows price adjustments including action *Update Pricing* in the *Pricing* tab (this tab appears only for sales orders with maintenance mode - *Internal*).
- Edit *List Price* and *Product Discount (%)* in the *Products* table.
- Edit *Overall Discount (%)* in the *Overview*.

Related Information

[Work with External Pricing [page 900]](#)

8.2.8.1 Configure Internal Sales Order Pricing

Administrators can configure pricing options for internal orders.

Go to ▶ *Business Configuration* > *Implementation Projects* ▶. Select your project and navigate to ▶ *Open Activity List* > *Fine Tune* > *Configure Price Strategy* > *Configure Pricing Procedure* ▶ to set your pricing options.

8.2.8.2 Estimate Prices

Price estimation is possible separately for orders created in online and offline. These actions are restricted for orders synced between online and offline.

Estimate Price (Offline) – This action to estimate prices is available only for orders created in offline and that are not yet synced.

Simulate (Online) – This action to estimate prices is available only for orders created in online mode.

8.2.9 Plant Based Ordering

You can create sales orders for products belonging to a Plant.

Your administrator can configure plant as an involved party in the business configuration. For more information, see Configure Plant Based Ordering [page 517]

To add the *Plant* field, use **adaptation** or **personalization**.

You can select the plant in the order header. This helps you to filter products based on the plant. You can also change the plant in the header.

If you want to filter products based on the plant, you can set the default query to *Related to Documents*. The value help then displays only those products from the sales area where this plant is maintained.

> **i Note**
>
> Changing the plant changes the product availability result.

The **Plant** option is available as a radio button in the combined list bucket for all orders where the plant is maintained in the header.

This list displays all the products belonging to that plant.

You can also add extension fields to the *Plant* tab in *Products* as search parameters for advanced filter in plant option.

> **i Note**
>
> * The field is added to the header and item order data sources.
> * The order OData collection is enhanced for the plant at the header and item levels.
> * If an order goes to ECC and the account and the product plant do not match, then the product plant takes precedence.

8.2.10 Create Multiple Sales Orders from One Sales Quote

Users can create multiple SAP Cloud for Customer sales orders from one sales quote.

The sales quote status changes to *Won* if a sales order reference exists.

Users can track the related call offs in the product table *Ordered Quantity* field. Navigate to *Personalize* to add the hidden *Ordered Quantity* field.

> **i Note**
>
> Ordered items which are not fully referenced to the SAP Cloud for Customer quote, will set the quote status to *In process*. As of the 1902 release, the quote status becomes *In process* not only if a referenced item in the order has been completely removed, but also when the referenced item quantity will be reduced

8.2.11 Create Sales Order in Detail View

You can enable the setting to create sales orders in detailed view. This opens the sales order detail screen directly skipping the quick create and quick order entry screen.

To do this, navigate to ▌▶ *Administrator* ❭ *Sales and Campaign Settings* ❭ *Sales Documents* ❭ *Configure Preferences for Sales Documents* ▌ and under *Create Sales Order in Detail View* set the toggle button to *Yes*.

8.2.12 Create Sales Orders and Sales Quotes as Follow-Up Documents

Create a sales order or sales quote as a follow-up document from a sales order.

A sales order or sales quote must have a consistent status and the pricing calculated successfully status to be created as a follow-up document.

When you create a sales order as a follow-up document:

- All items are copied including canceled items and text items.
- The header items of the BOM are copied, but not the child items. When an order is then simulated or transferred, the child items appear.
- Subitems that are text items are copied.

8.2.12.1 Create Follow-up Sales Orders From Sales Quotes Directly in ERP System

Create follow-up sales orders in your SAP ERP system from a sales quote in your sales cloud solution.

This feature requires that sales quotes are bi-directional integrated with your SAP ERP system. Key business benefit is that a follow-up order is created considering product reservations and any other special price conditions that are maintained in ERP system.

Select the action *Create External Follow-Up Document* in your SAP Cloud for Customer solution to create a follow-up sales order directly in your ERP sytem. You can create multiple follow-up sales orders in ERP. Note that the *Reference Status* for the quote must be set to *Not Yet Finished* to be able to create follow-up orders.

8.2.12.1.1 Configure Creating Sales Orders Directly From Sales Quotes

Administrators can configure creation of follow-up sales orders in your SAP ERP system directly from a sales quote in SAP Cloud for Customer system.

Configure the following settings:

- Go to ▶ *Business Configuration* ▶ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Communication and Information Exchange* ▶ *Integration into Sales, Service, and Marketing Processes* ▶ and select the scoping question: *Do you want to create follow-up documents for sales quotes from your cloud solution to an external application?*.
- Set up the communication arrangement *Create Follow-up Sales Order for Replicated Sales Quote in SAP Business Suite*.

8.3 Flexible Offline Pricing for Sales Orders

Flexible offline pricing supports multiple fields, price, discount, and surcharge determination. Sales order supports flexible offline pricing including total order pricing.

Reuse existing pricing procedures for supported fields from ERP by simply exporting them from SAP ERP and uploading them in SAP Cloud for Customer.

> ⚠ Caution
>
> Lean offline pricing that you may have implemented is deprecated and is supported only until 1805. Once you have enabled the new flexible offline pricing, the previous lean offline pricing will no longer work.

> i Note
>
> You need to make sure that your SAP Cloud for Customer ERP add-on (CODERINT) should be in CODERINT 6.0 SP26 level or above.

For the feature to work, the supported fields must be used in defining the pricing procedure. The offline pricing procedure for a document type should be a subset of the online pricing procedure and have the same name. The following fields are supported for flexible offline pricing in sales orders:

- Customer
- Products
- Sales Organization
- Distribution Channel
- Division
- Country of Sold-to-Party
- Customer Group of Sold-to-Party
- Incoterms
- Incoterms Location
- Payment Terms
- Document Type
- Sales Unit
- Sales Group
- Sales Office
- Account Classification
- Item Category
- Document Sales Org
- Material Groups 1-5/Product Groups 1-5 (in SAP Cloud for Customer)
- Material Group/Product Category (in SAP Cloud for Customer)
- Account Hierarchy
- Plant

> **i Note**
>
> Offling pricing will only be available after a sales order has been simulated while online for each order type, pricing procedure, and sales area combination defined in the fine tuning activity under ▶ *Business Configuration* ❯ *Implementation Projects* ❭. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Offline Pricing Using External Pricing* ❯ *Determine Pricing Procedure Rules* ❭.

Learn more about Flexible Offline Pricing.

8.3.1 Sync Pricing Master Data to Offline

Sync your pricing master data to offline. As a prerequisite, maintain the configuration required to sync your pricing master data to offline.

Based on the configuration, appropriate procedure will be determined for calculation within offline runtime. Scope of the price master data for download is also decided based on this setting from the sales organization perspective.

8.3.2 Offline Business Object Availability for Pricing Master Data Sync

Sync of pricing master data is context based and depends on availability of the corresponding business objects in offline.

The following objects act as context for pricing master data download:

- Sales Organization of the logged in user.
- Accounts
- Products

> **i** Note
>
> If the pricing master data involves accounts, products and sales organization, then the corresponding data is downloaded to offline only if those accounts, products and sales organizations are already synced to offline.

8.3.3 Offline Availability for Configurable Price Elements

Use configurable price elements in sales orders offline to add a discount to an order item or header and map it to a configurable price element.

When you map the discount to a configurable price element, the field appears in both online and offline. Configurable price elements were earlier available only in online. The standard system supports up to five configurable price elements at item level and three at the header level.

Administrators can maintain the configurable price elements. Go to ▐▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▐▶ *Open Activity List* ❭ *Fine-Tune* ❭ *External Pricing* ❭ *Maintain Configurable Price Elements* ❭ and maintain the following configuration:

- Map your pricing elements such as prices, surcharges, discounts, taxes and so on to corresponding configurable price elements.
- Maintain a label for the price element.
- Assign the appropriate authorizations under *Authorization Levels for External Pricing*.
- Map the price element from the pricing procedure to the condition type.

> **i** Note
>
> To use these configurable price elements, add them to your UI screens using the adaptation mode.

8.3.4 Offline Price Calculation based on Net Weight & Gross Weight

Use product weights for estimating prices in offline. Administrators can enable price calculation using weights in flexible offline pricing.

To use this feature, administrators must enable condition types for price calculation based on product net or gross weight. You must also have maintained weights for products in the product master data. To configure the feature, set up a condition type based on condition class - *Gross Weight* or *Net Weight*.

8.3.5 Pricing Status in Offline

View the pricing status in offline to determine if you need to estimate and fetch latest pricing. Use the action *Estimate Price* to calculate offline prices based on latest changes to the sales document.

When you estimate price, the *Pricing Status* changes from *Not Calculated* to *Calculated Successfully* and subsequently the *Estimate Price* action gets disabled. If you make updates to the document after calculating prices, the pricing status is reset to *Not Calculated* and the *Estimate Price* action gets enabled, indicating that you must trigger pricing calculation again.

8.3.6 Enable Manual Discount as Header Condition in Sales Orders

Administrators can enable manual discount as a header condition in pricing procedure. This allows users to enter a manual discount in the sales order header.

> **i Note**
>
> In the ERP/S/4HANA pricing procedure, you must have maintained a header condition type for manual discount condition.

To enable the feature, go to ▐▶ *Business Configuration* ❭ *Implementation Projects* ▌. Select your project and navigate to ▐▶ *Open Activity List* ❭ *Fine-Tune* ❭ *External Pricing* ❭ *Assignments of External Price Elements* ▌, and maintain the following configuration:

- Map the discount field to a configurable price element for header called *Total Price Element*.
- Maintain an appropriate label for the field.
- Assign appropriate authorizations.
- Map the field to the header condition type in the pricing procedure.

8.4 Complete Sales Orders

Complete sales orders with signatures, approval processes, simulation for external orders, and order summaries.

Add Two Signatures to Sales Orders [page 550]
> Capture graphical signatures from both your employee and the buyer in a sales order.

Configure Workflows to Send E-Mail Notifications to Individual Customers [page 551]
> Set-up your sales order e-mail workflows with individual customer as destination. To do this, use the *Accounts Contacts of Sales Order* under the *Recipient Determination* set-up in workflow rules.

Use Workflows to Submit Orders for Approval [page 551]
> Submit sales orders for approval process using the new workflow action - *Submit Orders for Approval*.

Define Approval Processes for Sales Orders [page 551]
> Define an approval process for acceptance of sales orders.

Create a Sales Order Summary [page 557]
> Create a summary of your sales order to send to your customers.

View Consistency Status for Sales Orders [page 558]
> Use the consistency status to assess your orders.

Complete Internal Sales Orders [page 558]
> Quickly complete an internal sales order in your system.

View Document Flow in Sales Orders [page 558]
> Document flow shows related transactions such as opportunity or activities.

Track Order With Involved Party Contact Using Live Activity [page 559]

When a contact from an order reaches out to contact center, use the live activity to identify the order for quicker processing.

In a sales order, under *Involved Parties*, you can click the phone number link to call the phone number listed under phone or mobile number.

8.4.1 Add Two Signatures to Sales Orders

Capture graphical signatures from both your employee and the buyer in a sales order.

Context

When you add a graphical signature to your sales order, you have the option to add two types of signatures: *Buyer Signature* or *Employee Responsible Signature*.This feature is available both online and offline

Procedure

1. Open a sales order and go to ▶ *Actions* ❯ *Sign* ❯.
2. From the *Party* dropdown menu, select *Buyer Signature* or *Employee Responsible Signature*.
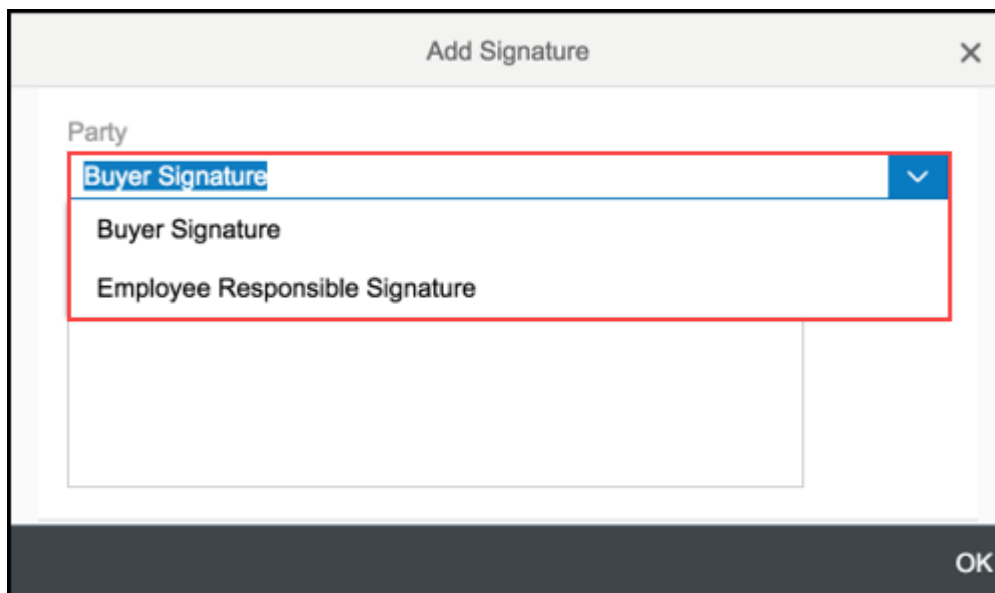
> **i** Note
>
> You can add a total of two graphical signatures, but only one for each type of party. Once you add one type of signature, the option is removed from the dropdown menu.

3. In the *Add Signature* dialog, add a signature in the box and select *Add and New* (to add the second signature), *Add and Close* (if you wish to add only one signature) and *Cancel* to close the dialog without
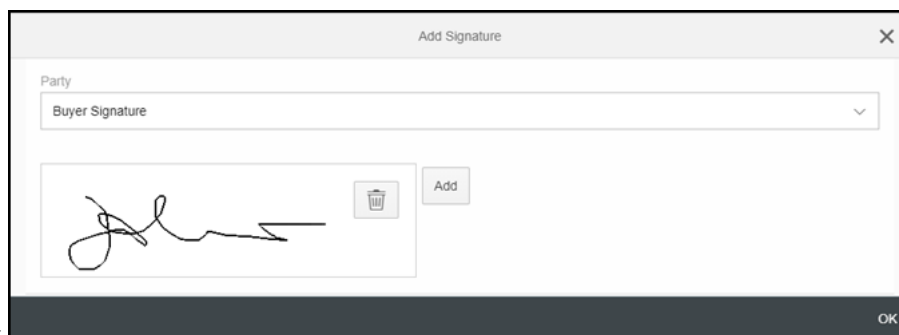
adding signatures.

Results

Once a signature is added, you can view it in the *Attachments* tab of the sales order. After you've saved one buyer signature and one employee responsible signature, the *Sign* option under *Actions* is disabled.

8.4.2 Configure Workflows to Send E-Mail Notifications to Individual Customers

Set-up your sales order e-mail workflows with individual customer as destination. To do this, use the *Accounts Contacts of Sales Order* under the *Recipient Determination* set-up in workflow rules.

8.4.3 Use Workflows to Submit Orders for Approval

Submit sales orders for approval process using the new workflow action - *Submit Orders for Approval*.

The following workflow actions are available for sales orders now: *Revoke*, *Submit for Approval*, *Transfer*, *Withdraw from Approval*.

8.4.4 Define Approval Processes for Sales Orders

Define an approval process for acceptance of sales orders.

Administrators can set different approval processes for sales orders that must be completed in order for the order to be submitted for processing. A sales order can have multiple levels of approvals and will follow the process the administrator has defined. Administrators can also set sales orders to be submitted automatically as part of the sales order approval process.

You can see the approval process, history, and details under the *Approvals* tab.

To submit an order for approval, go to ▶ *Actions* ❯ *Submit for Approval* ◗ or you can choose *Withdraw from Approval* if you accidentally submit for approval.

Manager can approve sales orders via email notification or in the *Approvals* tab in the sales order.

8.4.4.1 Prerequisites for Sales Order Approvals Using E-mails

Before using approvals via e-mail, ensure the following pre-requisites are met:

- **E-Mail Notifications**: Ensure that the involved employees are business users and have valid e-mail addresses, and that the CA certificates from the employees are uploaded to the system for outgoing e-mails.
- **E-Mail Notifications**: Each involved employee must subscribe to the e-mail notifications by opening the *Notifications* view and choosing *Subscribe to E-Mail*.
- **E-Mail Notifications**: Check that the e-mail clients of the involved employees have enabled the receipt of encrypted e-mails.

8.4.4.2 Approve Sales Orders Via E-Mail

Sales orders can be approved directly from an e-mail.

A sales order can be approved or sent back for revision from within an e-mail, without having to log into the system.

E-mail approval requires certificates setup for Outlook and Multipurpose Internet Mail Extensions (MIME) configuration.

8.4.4.3 Configure Sales Order Approval Via E-Mail

Administrators can configure sales order approval via e-mail with scoping activities.

Before using approval via e-mail, ensure the following:

- The involved employees are business users and have valid e-mail addresses, and that the CA certificates from the employees are uploaded to the system for outgoing e-mails.
- The involved employee are subscribed to the e-mail notifications by opening the *Notifications* view and choosing *Subscribe to E-Mail*.
- The e-mail clients of the involved employees have enabled the receipt of encrypted e-mails.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* 〉. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Built-in Services and Support* 〉 *System Management* 〉 *Security* 〉 and check the box for the encryption and signatures in e-mail question.

Scoping Questions for Enabling Automatic Approval Processes

Business Object	Navigation in System	Scoping Question
Campaigns	▶ *Sales Campaign* ❯ *Campaign Management* ❯ *Campaign Execution* ❯	```Do you want to use a multi-step approval process for campaigns?```
Opportunities	▶ *Sales* ❯ *New Business* ❯ *Opportunities* ❯	```Do you want to use a multistep approval process for opportunities?```
		```Do you want the system to automatically submit an opportunity for approval?```
		i Note This question is optional and only relevant if you want trigger automatically an approval for your opportunities if the entered data fulfill the defined criteria.
Sales Quotes	▶ *Sales* ❯ *New Business* ❯ *Sales Quotes* ❯	```Do you want to use a multi-step approval process for sales quotes?```
Tickets	▶ *Service* ❯ *Customer Care* ❯ *Service Request Management* ❯	```Do you want to use a multi-step approval for tickets?```
		```Do you want to automatically submit tickets for an approval workflow after one or more specified conditions are fulfilled?```
	▶ *Service* ❯ *Employee support* ❯ *Ticket Management* ❯	```Do you want to use a multi-step approval for tickets?```

Business Object	Navigation in System	Scoping Question
		Do you want that the system submits automatically a ticket for approval? **i Note** This question is optional and only relevant if you want trigger automatically an approval for your tickets if the entered data fulfill the defined criteria.
Contracts	▶ *Service* ❯ *Entitlement Management* ❯ *Service Contract Management* ❯	Do you want to use a multi-step approval for service contracts?
E-mail Notifications - E-mail encryption and signature	▶ *Build-in Services and Support* ❯ *System Management* ❯ *Security* ❯	Do you want to use encryption and signature for e-mails?

8.4.4.4 Configure Approval Process for Sales Orders

Administrators can configure approval processes for sales orders.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Approval for Sales Orders* ❯ to define your approval tasks.

Approval workflow for multi-level approvals can also be used to determine the next level reporting managers. If the appropriate approval process and conditions for the approval task are maintained and the defined conditions are met, then the system determines next level reporting manager from the organization structure maintained in your system.

Create approval processes using the three price elements displayed in sales order header level as discounts (or any other price condition).

Multi level approval process must already be enabled in your system. To do this, go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *New Business* ❯ *Sales Orders* ❯ and select the scoping question: *Enable multi-level approval for sales orders?*

8.4.4.5 Configure E-Mail and Fax Settings for E-Mail Notifications

Administrators need to specifiy the company domain for e-mail notifications.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ▶. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *E-Mail and Fax Settings* ▶.

Enter your company domain, such as `example.com`, as the *Allowed Sender E-Mail Domain*.

8.4.4.6 Configure S/MIME for E-Mail Notifications

Administrators can upload certificates needed for e-mail notifications for all employees.

Context

To enable e-mail notifications, upload the CA certificates in this area for the e-mail address for generic business task management for all involved employees and managers.

Procedure

1. Choose ▶ *Administrator* ❯ *Common Tasks* ❯ *Configure S/MIME* ▶.
2. On the *Incoming E-Mail* tab, upload the CA certificates from all involved employees for the generic incoming e-mail address *Business Task Management Email Notifications*.
3. On the *Outgoing E-Mail* tab, install the system CA certificate in the e-mail client of the involved employee as follows:
    a. In the *SAP Trust Center Service* column, click *Link to SAP CA* to open the *SAP Trust Center Service*.
    b. On the *Root Certificates* section of the screen, click *SAP Passport CA Certificate*. A popup opens.
    c. Click *Install Certificate...* and follow the wizard by clicking *Next >*.
    d. Select *Place all certificate in the following store* and click *Browse...*.
    e. Select *Trusted Root Certification Authorities* and click *OK* and then *Next >*.

    Now the CA certificate from the system is installed locally.
4. Now activate the S/MIME on the *Activate S/MIME* tab select the options for *Check Signature of Incoming E-Mails*, *Encrypt Outgoing E-Mails* (optional), and *Signing Outgoing E-Mails*.

8.4.5 Create a Sales Order Summary

Create a summary of your sales order to send to your customers.

8.4.5.1   View Sales Order Summary

View a summary of your sales order as a PDF.

The sales order summary is displayed in a PDF when you go to ▌▶ *Actions* ❭ *Preview* ❭. You can view a sales order summary when you are online and offline. The summary may display different information in online versus offlin edepending on how your administrator has configured the templates.

8.4.5.2   E-Mail Sales Order Summary

Use ▌▶ *Actions* ❭ *E-mail* ❭ to send the sales order in an e-mail. To use this feature, you will need to configure the required form templates. For sales orders, form template can be created and is available as part of active templates under ▌▶ *Administrator* ❭ *Form Template Maintenance* ❭.

Select the *Sales Order* as template group and use ▌▶ *Actions* ❭ *Create E-mail Template* ❭. Note that you can create different templates for your requirements.

The Sales Order form template has the following sections for which you can add additional fields: *Sales Order ID*, *Contact Information*, *Terms and Conditions*, *Notes*, *Table* (with columns for Item Product Requirement Specification and Item Notes), *Letter Text* and *Signature Text*.

In the *Form Template Selection*, select *Show Rules* for *Sales Order* and you can specify the *Document Type*, *Account*, *Country Code*, *Customer Group*, *Sales Unit* for which the form template will be valid.

> **i** Note
>
> For example, if you specify a document type here, then *E-mail* action will use the template for all sales orders with this document type.

8.4.5.3   Set Languages for Sales Order Summaries

The language for your sales order summary is determined by the default set by the customer or, if one is not set, the default language for your user in the system will be set.

You can choose a different language for the summary from within a sales order. In the sales order *Overview* find the field for *Language* and select a language from the dropdown menu. The languages in this list are determind by the communication languages your administrator has defined.

> **i Note**
>
> Products already entered as items will not change the language output of the product description.

8.4.6 View Consistency Status for Sales Orders

Use the consistency status to assess your orders.

Your SAP Cloud for Customer system checks to makes sure that functional parameters are met and gives a consistent or inconsistent status that signifies whether or not sales orders can be completed. Sales orders with an inconsistent cannot be completed

8.4.7 Complete Internal Sales Orders

Quickly complete an internal sales order in your system.

Use ▶ *Actions* ❭ *Set as Completed* ❭ to complete an internal sales order. You do not need to simulate or transfer internal sales orders.

8.4.8 View Document Flow in Sales Orders

Document flow shows related transactions such as opportunity or activities.
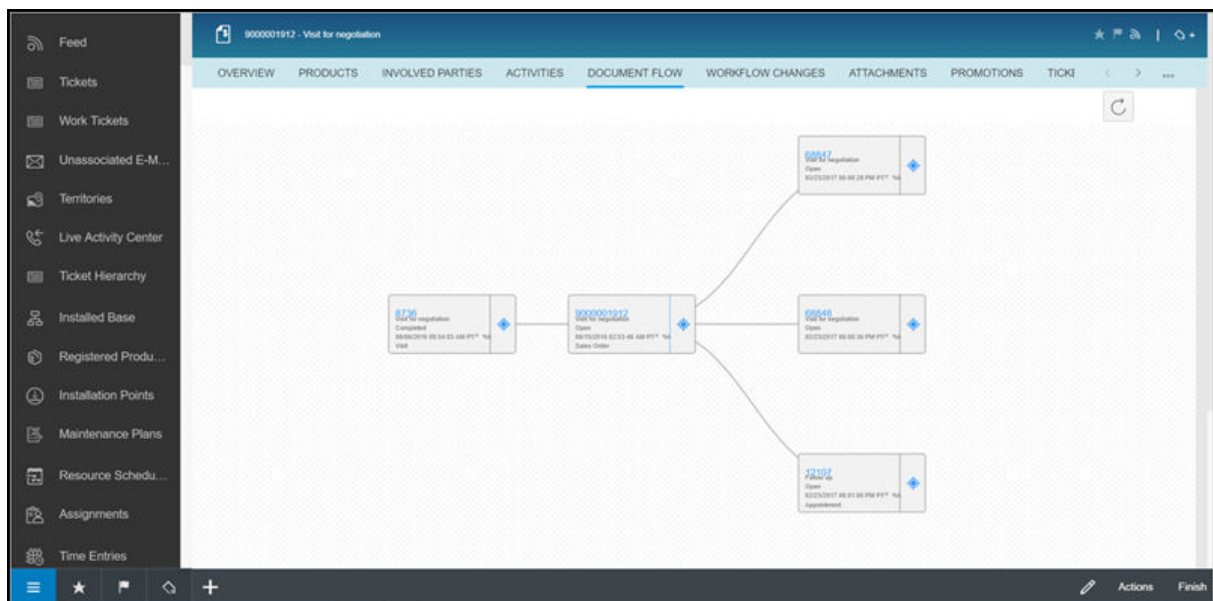
8.4.9 Track Order With Involved Party Contact Using Live Activity

When a contact from an order reaches out to contact center, use the live activity to identify the order for quicker processing.

> i Note
>
> This feature is only available in the Fiori client.
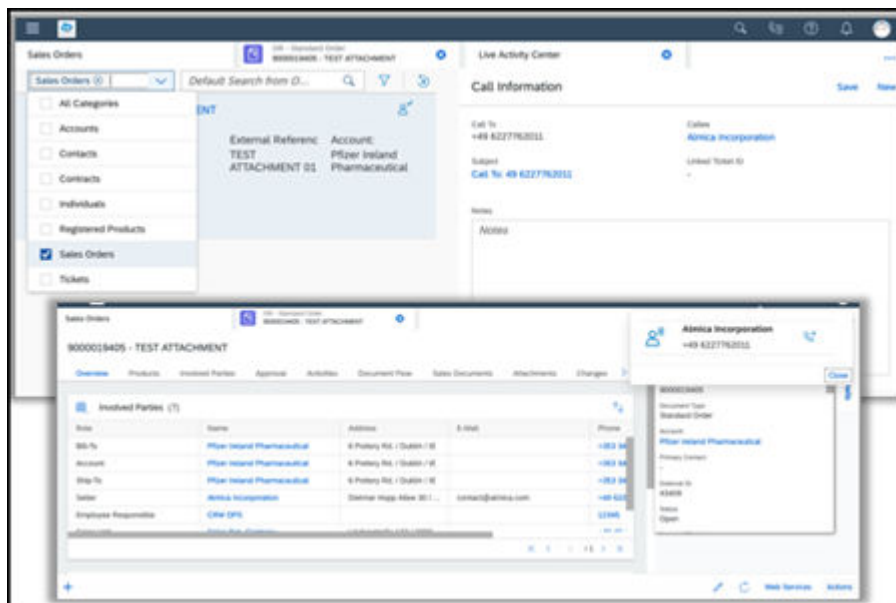
8.4.10 Use Click-to-Call in Sales Orders

In a sales order, under *Involved Parties*, you can click the phone number link to call the phone number listed under phone or mobile number.

When you click the phone number link, you are taken to the live activity center where you can enter notes and save your phone call. When you are finished, your phone call is saved in the sales order under ▶ *Activities* ▶ *Phone Calls* ▶.

> i Note
>
> Click-to-call is only available in the SAP Fiori Client. The computer telephony integration (CTI) solution must also be embedded.

8.5 Integrate Sales Orders with SAP ERP

Integrate your SAP Cloud for Customer system with SAP ERP to get all pricing, shipping, and delivery information for external sales orders.

Integration with an ERP system is a prerequisite for running most of the processes for sales orders. The integration framework is documented in the Prepackaged Integration with SAP ERP guide.

> **i Note**
>
> Only integration with SAP ERP is supported in the current release. If a connection has been established with an on-premise ERP system, then the sales orders that you create will be replicated in the external ERP system. Note that *Transfer* is possible only if the pricing status is set to *Calculated Successfully*. Therefore, you can transfer only after you have completed the simulation.

The following data is exchanged between the two systems:

- From SAP Cloud for Customer:
  - Account and description for the account
  - Document type
  - Product and item related data
  - Notes
  - Involved parties
- From SAP ERP:
  - External reference data (*External ID* or sales order ID in the external system, *External Reference* and *Description*)
  - All header statuses for the sales order including *Billing Status*, *Ext. Overall Status*, *Credit Status Cancellation Status* and *Blocked Status*, *Rejection Status*, etc.
  - for product line items
  - *Rejection Status*
  - Involved Parties
  - *ATP quantity* (available quantity as confirmed from external system) and *ATP Delivery* (scheduled delivery date confirmed from external system)
  - External notes created in the external system.

Work with External Pricing [page 561]
    Learn about SAP Cloud for Customer external pricing and how retrieve complete price information including tax from an external system.

Simulate Sales Orders in SAP ERP [page 561]
    Provide your customers with accurate pricing and delivery information before confirming an order.

Finalize Sales Orders in SAP ERP [page 565]
    Finalize a sales order and send it out for fulfillment, billing, and shipping.

Order Replication - Restrict Changes to SAP Cloud for Customer [page 566]
    Use document type *External Inbound* to ensure that changes made to orders replicated from your SAP ERP solution are restricted to SAP Cloud for Customer and not transferred back to your ERP system.

Replication of Orders for Prospects [page 566]
    For prospects that are replicated to ERP, the *Simulate*, *Transfer*, and *Finish* actions are enabled.

Use 'Finish' to Collectively Trigger Simulate and Transfer Actions [page 567]

Use action *Finish* to combine collectively perform a save, simulate and transfer of the order to ERP system all with a single click. Orders can be revised multiple times until all of the order items and the order itself is completed. Note that *Finish* triggers both simulate and transfer collectively as background actions.

8.5.1 Work with External Pricing

Learn about SAP Cloud for Customer external pricing and how retrieve complete price information including tax from an external system.

If your administrator has set-up external pricing in your system, you can retrieve complete price information including tax from an external system for your sales quote documents. The configuration, if external pricing is applicable, depends on the selected document type.

When you create a sales quote in your system and you have a connection to an external system, such as SAP CRM and SAP ERP, a request can be triggered to the external system to simulate a sales order.

8.5.1.1 External Pricing with Free Goods, Product Availability, and Credit Status

Learn about SAP Cloud for Customer external pricing for free goods, product availability check, as well as enhanced external pricing.

When you have enabled the external pricing in your system you receive for a specific sales quote document type, pricing details from the external system. In addition, the solution also provides:

- Complete pricing information including tax and gross and net values
- Free goods determination
- Product availability check
- Credit status

The prerequisite is that your administrator has enabled the external pricing for the document type and for the pricing itself aligned the pricing texts (conditions and subtotal descriptions) in the business configuration.

Enhanced External Pricing

You can view and edit a limited amount of *External Price Elements* directly on header or in products table of sales quote or sales order. You can also completely hide the *Product Pricing* and *Total Pricing* view in order to focus on the main price elements.

8.5.2 Simulate Sales Orders in SAP ERP

Provide your customers with accurate pricing and delivery information before confirming an order.

Use the simulate action when you want to capture an order and would like accurate pricing (net price, discounts, and net value), product availability (delivery dates, ATP quantities and ATP type), and statuses

(credit and rejection) information. The action allows the system to simulate the order captured in SAP Cloud for Customer in ERP and return with all of the information mentioned above. You can adjust items or quantities in an order and simulate multiple times before finalizing the order for transfer.

> i Note
>
> - Before the simulation is triggered, total pricing details are not available and the pricing status of the sales order is set to *Not Calculated*. After simulation is complete, the net price is updated in the sales order header and the pricing status is set appropriately (for example, the pricing status is set to *Calculated Successfully* or *Calculated with Errors*). The total price component details is updated in the *Products* tab screen.
>
> - ▶ *Actions* 〉 *Transfer* 〉 is disabled if you modify the order after simulate. You will need to simulate again to be able to transfer the order to external ERP system.

You can find the simulate option on the screen under *Actions*.

8.5.2.1 Use Free Goods Determination

Simulate or transfer an order from SAP ERP to view the free goods that are available. With external pricing, you can also trigger free goods determination.

When you simulate or transfer an order, you see the available free goods. If you change products or product quantities in a sales order, free good items are removed and you must simulate or transfer the order again. Free goods determination supports both exclusive (for example, buy ten and get one free) and inclusive (for example, buy 10 and pay only 9) procedures.

> i Note
>
> Free good information is read-only and edits are not possible.

8.5.2.2 Check Credit Limit

When processing a sales order, ensure your customers are within their credit limit.

When you simulate or transfer an order, you will see the credit status, credit limit, and credit exposure that has been defined from the SAP ERP system. If the sales order amount exceeds the customer's limit, you will get a warning message.

You can use credit status as a part of approval conditions for your sales order.

Related Information

8.5.2.3   Bill of Material Explosion

View the bill of materials from SAP ERP system.

When you simulate or transfer an order, you can view the multi level bill of materials (BoM) explosion from SAP ERP/CRM.

8.5.2.4   View Product Substitutions

Get product substitution suggestions for products that are out of stock or discontinued.

Configure the alternate products you want to be substituted for a product in your SAP ERP system. Then, when you simulate or transfer a sales order, if a product has an alternate product to substitute, you can view it in the *Products* tab. You can see the original product as well as the item that is being substituted in its place.

8.5.2.5   View External Pricing Elements

Choose which pricing elements to show in a sales order.

View and edit pricing elements in your sales order. View your pricing procedure in the header of your sales order and the *Product Pricing* and *Total Pricing* in the *Products* tab.

8.5.2.6   Configure External Pricing

Administrators can configure external pricing components.

In this activity, you can add configurable price components to the product table to enable user to manually add some price components from ERP and map them here directly to document types. Go to ▶ *Business Configuration* ▶ *Implementation Projects* ◀. Select your project and navigate to ▶ *Open Activity List* ▶ *Fine-Tune* ▶ *External Pricing* ◀ and define the following:

- **Labeling External Pricing Elements**
  In this activity, you can assign labels to standard pricing elements.
- **Assignments of External Pricing Elements**
  In this step, you can assign pricing procedures and condition types the pricing elements. You enable the following with these assignments:
  - The *Products* table displays the corresponding fields associated with the pricing procedures.
  - The *Product Pricing* table displays the conditions (mapped to the pricing element) per product item.
  - The *Total Pricing* table displays the conditions (mapped to the pricing element) for the complete sales order.

8.5.2.7 Check Product Availability

View estimated product availability after you have simulated or transferred an order.

In the *Products* view, under *Product Availability*, view the estimated ATP (Available To Promise) quantity and delivery date simulated from SAP ERP.

Fields *ATP Quantity* and *ATP Delivery (Date)* in product table can be added through personalization.

8.5.2.8 View Sales Order Sync Statuses with ERP System

Sales orders can have various statuses generated internally in the cloud solution.

View the different status in the sales order overview.

- **Credit Status** states if the number of units were exceeded or not or if credit status is relevant for the order.
- **Pricing Status** is internal to the cloud solution and determines if transfer can be initiated for sales order. The following pricing statuses are possible for an order:
  - **Calculated Successfully**: Simulation has been carried out and the data has been successfully read from ERP system and displayed in the cloud solution
  - **Not Calculated**: No simulation has yet been initiated for the sales order.
  - **Calculated with Error**: Simulation has encountered errors .
- **Cancellation Status** signifies whether or not the order has been cancelled.
- **Rejection Status** is reflected at both header and item level along with the reason for rejection.
- **Delivery Status** is displayed for both header and item level along with the ATP delivery and quantity.

8.5.2.9 Simulate Sales Orders Offline

Save your orders first, then simulate or transfer when offline.

> **i Note**
>
> To simulate sales orders offline, you will need to be connected to the network.

> **i Note**
>
> When creating an order offline, use the *Save and Open* action on the item proposal screen to save your order. Then, to retrieve pricing information, use the *Simulate* or *Transfer* actions from the sales order screen.

8.5.2.10 View SAP ERP Messages While Editing Sales Orders

View SAP ERP error messages while editing your sales order to resolve validation issues.

When you simulate a sales order, if SAP ERP finds any issues in the validation or determination for the sales order, error messages are displayed on the sales order screen. The error messages are displayed until the sales order is closed. You can view the error messages while you edit the sales order. Then, simulate the order again to refresh the error messages and check to see if you have resolved the issues.

8.5.3 Finalize Sales Orders in SAP ERP

Finalize a sales order and send it out for fulfillment, billing, and shipping.

After you've simulated an order and are ready to move forward, you'll need to transfer the order to SAP ERP to get it finalized.

8.5.3.1 View SAP ERP Transfer Status

The transfer status is internal to the cloud solution and helps to identify the sales order sync status with ERP system.

One of the following values will be displayed as transfer status depending on the status of the sync:

- **Not Started** - Transfer not yet initiated
- **In Process** - Transfer initiated but yet to be received in the ERP system
- **Finished** - Data successfully transferred from cloud solution to ERP system
- **Interrupted** - Data transfer stopped due to technical error
- **Not Relevant** - For orders that cannot be transferred to ERP system for technical reasons (for example sales orders created using prospect accounts)

8.5.3.2 Transfer Sales Orders to SAP ERP

Transfer of an order involves actual creation of the order in ERP and will trigger any follow-up processes configured in ERP like fulfillment and billing.

Transfer statuses provide you with insight into the sync status of the SAP Cloud for Customer sales order with SAP ERP system.

One of the following values will be displayed as transfer status depending on the status of the sync:

- *Not Started* - Transfer not yet initiated.
- *In Process* - Transfer initiated but data is being transferred to the ERP system.
- *Finished* - Data successfully transferred from SAP Cloud for Customer to ERP system.
- *Interrupted* - Data transfer stopped due to technical error.

- *Not Relevant* - For orders that cannot be transferred to ERP system for technical reasons (for example sales orders created using prospect accounts).

> **i Note**
>
> Transfer is possible only if the pricing status is set to *Calculated Successfully*. Therefore, you can transfer only after you have completed the simulation. Use action *Finish* to initiate both simulate and transfer together in the background.

Click on ▮▶ *Actions* ❯ *Transfer* ▮ to replicate the order you created in SAP Cloud for Customer to the ERP system.

8.5.3.3 Finish Sales Orders

The finish action can be used to combine all of the actions of save, simulate and transfer of the order to ERP in a single click.

Orders can be revised multiple times until all of the order items and the order itself is completed.

Click on ▮▶ *Actions* ❯ *Finish* ▮ to perform a save, simulate and transfer together (if there are no errors in simulation).

8.5.4 Order Replication - Restrict Changes to SAP Cloud for Customer

Use document type *External Inbound* to ensure that changes made to orders replicated from your SAP ERP solution are restricted to SAP Cloud for Customer and not transferred back to your ERP system.

Go to ▮▶ *Business Configuration* ❯ *Implementation Projects* ▮. Select your project and navigate to ▮▶ *Open Activity List* ❯ *Sales Orders* ❯ *Maintain Document Types* ▮, select the document type *External Inbound* if you do not want updates made in SAP Cloud for Customer to reflect in your ERP system.

8.5.5 Replication of Orders for Prospects

For prospects that are replicated to ERP, the *Simulate*, *Transfer*, and *Finish* actions are enabled.

For prospects that are not replicated to ERP, the *Transfer*, and *Finish* actions are disabled. The simulate action is still enabled so that you can check the estimated prices if required.
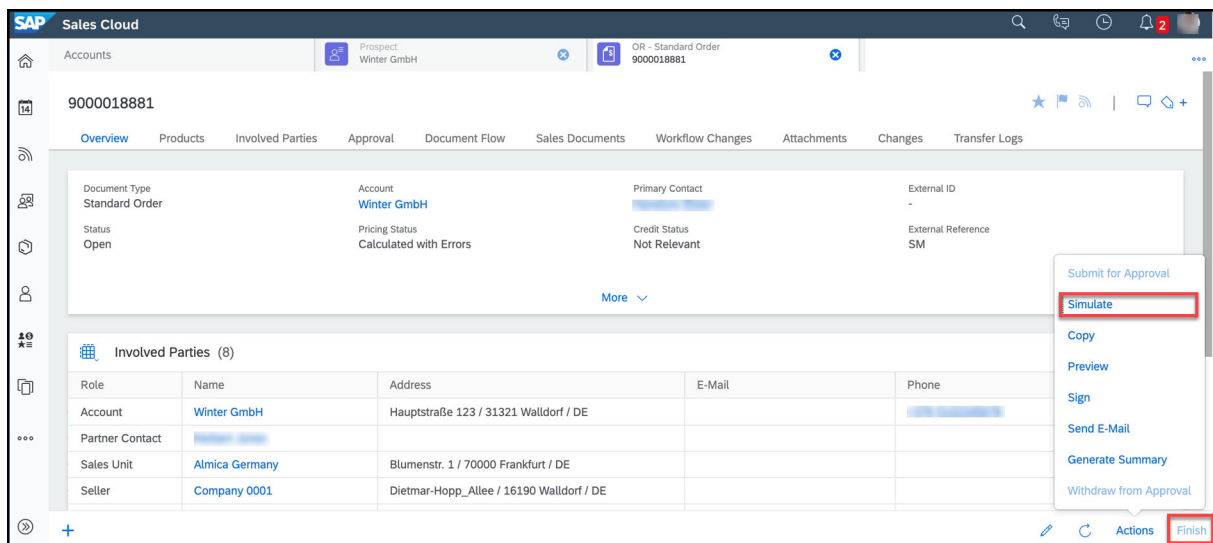
8.5.6 Use 'Finish' to Collectively Trigger Simulate and Transfer Actions

Use action *Finish* to combine collectively perform a save, simulate and transfer of the order to ERP system all with a single click. Orders can be revised multiple times until all of the order items and the order itself is completed. Note that *Finish* triggers both simulate and transfer collectively as background actions.

8.6   Sales Order Reporting

Following standard reports are provided for sales orders under ▐ *Analysis* ▶ *Reports* ▐, if configured by your administrator.

- **Sales Order Item Value by Product Category**: Shows the history of the product quantity ordered and the net amount for the item.
- **Sales Order Value by Account**: Shows the net amount and the other sales order data.
- **Sales Order Value by Month**: Shows the net amount and other sales order data.

   Data Sources for Sales Orders [page 567]
      Use data sources for your analytics for sales orders.

8.6.1 Data Sources for Sales Orders

Use data sources for your analytics for sales orders.

Following data sources are provided for sales orders in the standard system:

- Sales Order Item
- Sales Order Involved Parties
- Sales Order Header
- External Aggregated Customer Sales Order View
- External Aggregated Customer Sales Order Item View
- BTD References for Sales Order Items

8.7 Sales Orders Offline

This topic presents the following information about sales orders in offline mode - validations, determinations, fields and actions supported, and additional information.

Validations and Determinations

Find below the information about sales orders implementation logic for change scenario in offline mode

Overview of Implementation Logic for Sales Orders in Offline Mode

Topic	Feature Determination	Standard Logic	Implementation Logic For Change Scenario in Offline Mode
Sales Unit	Sales Unit Determination	Sales unit from the org model from the logged in user	If the sales area is modified, then the following logic applies: • If sales area is maintained at the account level with the changed sales unit as either Sales Group or Sales Office, then the matching sales area ((Sales organization + disttribution channel + division) is considered.

Topic	Feature Determination	Standard Logic	Implementation Logic For Change Scenario in Offline Mode
Sales Area ⓘ Note The Payment Terms, Incoterms, Incoterms Location, Currency are determined from the sales data of account.	Sales Area ⓘ Note If the distribution channel and division have been manually changed, then these will not be re-determined after the change of sales organization. ⓘ Note Additionally, the following area also determined using sales data: • **Owner** : logged in user • **Primary Contact**: Primary contact of the account • **Ship-To**: The main ship-to of account is considered. If you first enter the Ship-to, , then the corresponding Sold-to (Account) will be determined. • **Pricing Date**: Current Date • **Requested Date**: Current Date + 2 Days • **Territory**: Territory is determined if the account has a single territory. Else, a warning message is displayed to manually select the territory.	• **Employee Sales Data**: Logged in user's sales area assignment is considered. If user is assigned to more than one sales areas, then the first sales area assignment is considered. • **Account Sales Data**: Validate if the sales area maintained at the account level has this Sales Unit assigned either as Sales Group or Sales Office. If available, the matching Sales Area (sales organization + distribution channel + division) is considered • **Account Sales Data** • Sales organization of the logged in user is considered without defaulting the Distribution Channel and Division.	• **Employee Sales Data**: If the sales organization is valid for the logged in user, defaults the same along with the distribution channel and division. • **Account Sales Data**: If the sales organization is maintained in the sales area of the account, the distribution channel and division from the matching sales area are defaulted. If more than one sales area assignments are available, then the first sales area is considered.

Topic	Feature Determination	Standard Logic	Implementation Logic For Change Scenario in Offline Mode
Product Lists	Manual Proposals(Add from List)	All product lists that are valid for today and : • Active and valid for all accounts **OR** • Valid for account in sales order **OR** Account hierarchy (parent accounts) + hierarchy indicator **OR** • Target groups of account and sales area or sales organization only or distribution channel only or division only and territory (if exists in sales order)	
	Auto Proposals	All products from the product lists that are marked for automatic assignment and that are: • Active and valid for current date. **OR** • Valid for account in sales order OR (account • Account Hierarchy (parent accounts) + hierarchy indicator • **OR** • Target groups of account AND sales area or sales org only or distribution channel only or division only and territory [if exists in sales order).	
Product Categroy	Product category	All product categories supported for offline orders	

Topic	Feature Determination	Standard Logic	Implementation Logic For Change Scenario in Offline Mode

Promotions	Promotion determination when a product is added	Released and valid for current date (buying date) **AND**:
		
		• Valid for accounts
		  OR
		• Valid for parent account with hierarchy
		  OR
		• Valid for target groups of account	

	Promotion Determination When Multiple Promotions are Available	When multiple promotions are available, the priority is determined as per the sequence given below: 1. Promotions directly at account level 2. Promotions at parent account level 3. Promotions at target group level	
Product UoM		The unit of measure at the sales area level (sales organization + distribution channel) will be defaulted	

Topic	Feature Determination	Standard Logic	Implementation Logic For Change Scenario in Offline Mode
Pricing	Pricing is based on replicated conditions from ERP system	• **Base Price or Customer Specific Price Determination:** - The price added manually for a newly added product is considered as the base price. • **Manual discount condition (% and absolute) at item level** - This discount condition, when applied, subtracts the discount percentage and absolute discount from the net price. i Note The calculation and sync of conditions is based on the assumption that the first two flexible conditions (PPE1, PPE2) are mapped to manual discount (%) and manual discount (absolute).	
Actions in **Add Products** screens	Action *Save*	Saves the order and returns to the search list	
	Action *Save and Simulate*	Saves the order and opens the order in offline mode i Note No simulation is performed for offline orders	

Topic	Feature Determination	Standard Logic	Implementation Logic For Change Scenario in Offline Mode
Validations		Following validations are performed on offline orders: 1. Minimum order quantity check based on sales area in products 2. Account blocks check based on order blocking reason in account + document type from fine tuning configuration 3. Multiple territory check and warning	
Document Type		Possible order document types will be displayed for selection. *External Only* document types are not displayed for selection.	
Sales Order Detailed View		1. Sales order detailed view display includes the tab screens for *Overview*, *Products* and *Involved Parties*. 2. Header fields can be modifed 3. Single product can be added using the *Add Product*.	
Past Sales Orders		All completed sales orders for account **OR** account + logged in employee **OR** for logged in employee	

Fields

Information about offline sales orders field level availability is detailed in this topic.

> **i Note**
>
> Most of the sales order fields are now also available offline. The fields that have some offline determination have been listed in the table below.

Create Screens - Field Level Availability Information

Object Header	Field	Availability Offline	Default/Determination Online	Default/Determination Offline
Order Header				
	Account	Y	N	N
	Document Type	Y	Y	Y
	Description	Y	N	N
	Requested Date	Y	Y	Y
	Sales Unit	Y	Y	Y
	Distribution Channel	Y	Y	N
	External Notes	Y	N	N
	Ship-To	N	Y	Y
	Pricing Date	Y	Y	Y
	Owner	Y	Y	Y
	Sales Organization	Y	Y	Y
	Territory	Y (Disabled)	Y	NA
	Internal Notes	Y	N	N
	Division	Y	N	N
	Primary Contact	Y	N	Y
	External Reference	Y	N	N
	Language	Y	Y	N
	Currency	Y	Y	N
Add Products (screen)				
	Product	Y	Y	Y
	Quantity	Y	Y	N

Object Header	Field	Availability Offline	Default/Determination Online	Default/Determination Offline
	Product Category	Y	Y	Y
	Promotion	Y	Y	Y
	Manual Discount % (Offline Only)	Y	N	N
	Manual Discount Currency (Offline Only)	Y	N	N
	Estimated Price (Offline Only) - [Price x quantity - discount% - discount (currency)]	Y	N	Y
	Extension Scenario	Y	Y	N
	Item Type	Y	N	N
	UoM	Y	Y	Y
	GTIN	Y	Y	N
	External Product ID	Y	Y	N

Order Detailed View - Field Level Availability

Tab	Section	Field	Display	Edit (direct OR Via Actions OR Via Navigations)
Overview			Y	Y
	Header Fields	Account	Y	Y
		Primary Contact	Y	Y
		External ID	Y	N
		External Overall Status	Y	N
		Pricing Status	Y	N
		Credit Status	Y	N
		External Reference	Y	Y

Tab	Section	Field	Display	Edit (direct OR Via Actions OR Via Navigations)
		Description	Y	Y
		Creation Date	Y	Y
		Requested Date	Y	Y
		Cancellation Status	Y	N
		Reason for Rejection	Y	N
		Net Value	Y	N
		Tax	Y	N
		Payment Terms	Y	Y
		Inco Terms	Y	Y
		Inco Terms Location	Y	Y
		Owner	Y	Y
		Sales Unit	Y	Y
		Distribution Channel	Y	Y
		Division	Y	Y
	Products	Line	Y	NA
		Product	Y	NA
		Description	Y	NA
		Net Price	Y	NA
		Quantity	Y	NA
		Net Value	Y	NA
	Involved Parties	Role	Y	NA
		Name	Y	NA
		Address	Y	NA
		E-mail	Y	NA
		Phone	Y	NA

Tab	Section	Field	Display	Edit (direct OR Actions OR Via Navigations)
		Main	Y	NA
	Products (table)	Line Item	Y	NA
		Product ID	Y	Y
		Product Description	Y	Y
		Net Price	Y	Y
		Quantity	Y	NA
		Net Value	Y	Y
		Tax Amount	Y	NA
	Product Pricing (table)	Price Component	Y	N
		Description	Y	NA
		Status	Y	N
		Manually Added	Y	N
		Amount	Y	NA
	Product Availability Table	Delivery Date	Y	N
		Quantity	Y	N
		ATP Type	Y	N
	Notes	External Notes	Y	N
		Internal Notes	Y	N
	Total Pricing (table)	Price Component	Y	NA
		Description	Y	NA
		Status	Y	NA
		Manually Added	Y	N
		Price Component Value	Y	

Tab	Section	Field	Display	Edit (direct OR Via Actions OR Via Navigations)
Involved Parties	Involved Parties	Role	Y	N
		Name	Y	N
		Address	Y	N
		E-mail	Y	N
		Phone	Y	N
		Main	Y	Y
		Delete Action	N	Y
Attachments	Attachments	Title	Y	N
		Type	Y	N
		Changed On	Y	N
		Changed By	Y	N
		Delete Action	Y	Y
Activities	Appointments / Phone Calls / Tasks	Subject	Y	N
		Status	Y	N
		Start Date/Time	Y	N
		Owner	Y	N
		Primary Contact	Y	N
Tickets	Tickets	ID	Y	N
		Description	Y	Y
		Relationship	Y	N
		Priority	Y	N
		Status	Y	N
		Created On	Y	N
		Assigned To	Y	N

Tab	Section	Field	Display	Edit (direct OR Via Actions OR Via Navigations)
		Action - New	N	Y
		Action - Guided New	N	Y

Actions

Find information about the different actions available in offline for Sales Orders

Order Detailed View - Actions Availability

Global/Tab	Actions	Offline Availability
Global	New	Y
	Preview	N
	Copy	N
	Send E-mail	N
	Submit for Approval	Y
	Transfer	N
	Simulate	Y
	Finish	Y
	Save	Y
	Cancel	Y
Products	All Products	Y
	Past Orders	Y
	Product Lists	Direct assignment to account or valid for all accounts.
	Promotions	Direct assignment to account.
	Add	Y
	In Line Delete	Y
	Sort	Y

Global/Tab	Actions	Offline Availability
	OK	Navigates back to the quick create dialog.
	Save and Open	Y
	Save and Simulate	Save the simulated the order and open the sales order - Product tab screen in focus.
	Finish	Triggers the relevant actions when synced. And after the sync, the other is no longer editable.
	Bar Code Scanner	Allows to add products by scanning based on the GTIN maintained in products master data.
	Increment Quantity	Number maintained allows the adding that number to the quantity of a product.

Additonal Information

Things to keep in mind as you work with Sales orders.

- You can add products in offline fast order entry using bar code scanning. The following conditions are valid for bar code scanning:

> i Note
>
> This feature is available only for extended edition on device.

- - If you are using a third-party application for scanning, you can only scan one product at a time. Note that the app has to be launched each time you need to scan.
  - If you are using an in-built bar code scanner on the device, you can scan multiple products after you launch the plug-in for this application the first time you use the app.
  - **Item category selection** : You can change the item category for a line item for orders with maintenance mode *Internal & External*.
  - Availability of estimated prices during product selection for offline orders.
  - **Configurable Price Elements Mapping for Offline Manual Discount**: Mapping between pricing conditions and configurable price elements (CPE) for enabling offline manual discounts in sales order. A new configuration under ▶ *Business Configuration* ❯ *Open Activity List* ❯ *External Pricing* ❯ *Assignment of External Price Elements for Offline Pricing* ◀ is available for this feature.
  - **Create and Edit Signature Capture**: It is possible to create and edit signatures in offline and sync back to the cloud solution.

8.7.1 Configure Custom Party Determination for Offline

Custom party role determination is now supported in offline. Currently the party role determination in offline is supported only for the party role - *Partner Party*.

Administrators can configure partner party role under ▌▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▌▶ *Open Activity List* ❭ *Party Role Definition* ❭.

In the *Party Role Definition*, first define a custom party role of *Partner Party* category, as an involved party.

Next, go to ▌▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▌▶ *Open Activity List* ❭ *Sales Orders* ❭ *Maintain Involved Parties* ❭, activate the determination steps for the party role. Additionally, maintain the *Take Over* behaviour of the party. Only two take over options are allowed for sales orders - *Only Main* or *Copy from Account*. When a user creates a new sales document in offline, this custom party role determination fetches the relevant involved party from the account using the determination rules.

8.7.2 Configure Product Lists Based on Categories for Offline Use

Configure product lists based on product categories. In offline mode, users can access the product list with all products belonging to that product category.
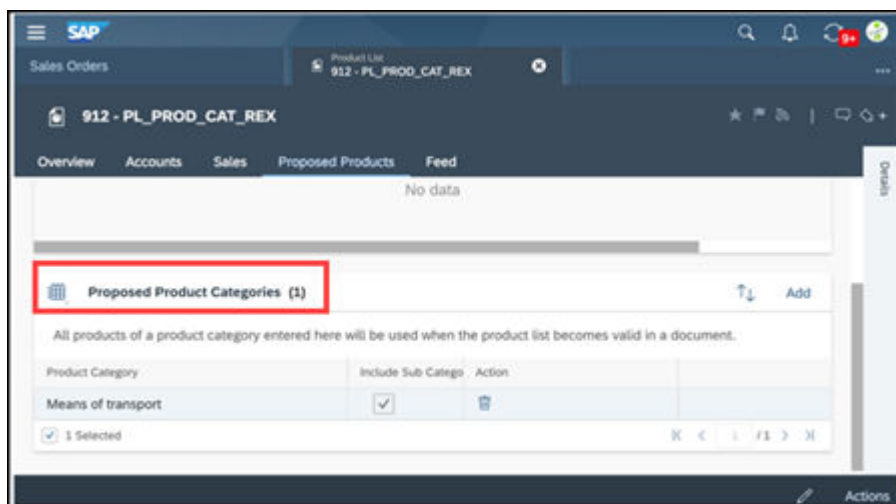
8.7.3 Copy Orders Offline

While working in offline mode, you can copy orders along with the product and quantity details.
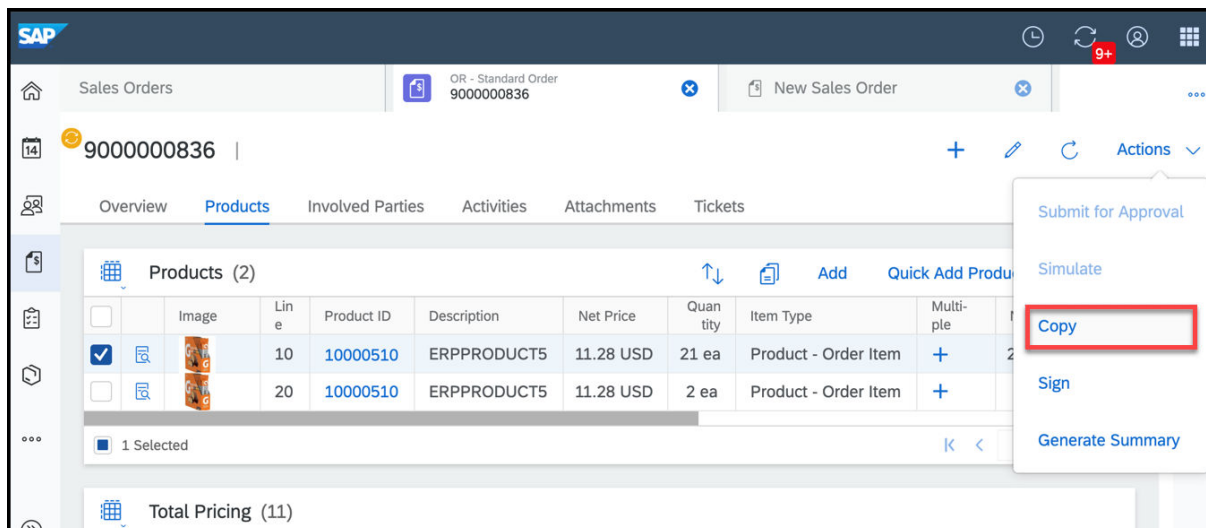
8.7.4 Configure Custom Keyboard for Order Taking in Offline

Administrators can configure a custom configured keyboard for smartphones.

Sales representatives can use this custom configured keyboard in smartphones for swift order taking in offline. Note that this keyboard is already available in online.

Configure the feature under ▌ *Administrator* 〉 *Sales and Campaign Settings* 〉 *Sales Documents* 〉 *Configure Preferences for Sales Documents* 〉 *Enable New Product Entry UI in Smart Phones* ▌.

8.7.5 Simulate Sales Orders Offline

Save your orders first, then simulate or transfer when offline.

> **i** Note
>
> To simulate sales orders offline, you will need to be connected to the network.

> **i** Note
>
> When creating an order offline, use the *Save and Open* action on the item proposal screen to save your order. Then, to retrieve pricing information, use the *Simulate* or *Transfer* actions from the sales order screen.

8.8 Sales Orders FAQ

Having trouble using Sales Orders? Check this list of questions and answers for help.

8.8.1 How is the sales area determined when creating a sales order in offline mode?

Combined sales area determination sequence.

The combined sales area determination sequence is listed below:

- Intersection of Account Sales Data and Employee Sales Data
- Compare match of Sales Organization + Distribution Channel + Division
- Compare match of Sales Organization + Distribution Channel
- Compare match of Sales Organization
- Employee Sales Data
- Intersection of Account Sales Data and Sales Organization of Employee Assignment
- Account Sales Data
- Sales Organization of Employee Assignment

> **i Note**
>
> In case more than one Sales Area is found for an Employee or an Account, then the system recommends the first one.

8.8.2 Why do I see products pre-populated on the item table when I create an order?

Product lists are configured for accounts and sales area. If the flag for *Automatic Proposal* is selected in the product list configuration, then you will see that products are pre-populated into the item proposal when you initiate an order.

8.8.3 How is the proposed quantity calculated in a sales order?

Proposed quantities can be maintained for the products in a product list. When you add items from a product list into an order, you can see these quantities and use them as a reference for ordering.

If there is no proposed quantity maintained for the product, then the product's minimum ordered quantity is considered. The minimum ordered quantity is maintained at the sales area level of each product. If the product is getting added from past order, then the quantity is proposed from the past order.

8.8.4 How are promotions determined when I create a sales order?

All the active promotions that are valid at the time of the sales order creation and that are also valid for the selected account are displayed to you at the time of the creation of a sales order.

8.8.5 How do I quickly add more products to an order that has already been created?

You can quickly add multiple products after saving an order, by going to the *Products* tab in the sales order and clicking ▶ *More* ▶ *Quick Add Products* ◢ and choosing products from *All Products*, *Past Orders*, *Product Lists* and *Promotions*.

. This opens the same screen that you use at the time of initial order entry but with an empty item proposal table.

8.8.6 Can I create a service ticket while working on my order?

Under *Products* tab in a sales order, for each line item you have the option to create a new follow-up ticket.

8.8.7 Why don't I see the option to simulate, transfer and finish in my sales order?

Based on which document type has been setup by your administrator for external pricing in the maintenance mode, you can see or not see the option to Simulate, Transfer and Finish in your sales order.

Only the sales orders whose document type have maintenance mode set as External and Internal have simulate, transfer and finish under actions menu enabled.

8.8.8 How do I stop sales orders stuck in the transfer process?

Stop the transfer process of a *Sales Order* so you can delete it.

Context

When a *Sales Order* is stuck in the transfer process, you can't delete it. The *Revoke Transfer* action stops the process and therefore changes its transfer status. Once the order's transfer status is changed to *Not Started*, you can delete it. The *Revoke Transfer* option is available to orders with a transfer status of *In Process* only.

Procedure

1. Open a *Sales Order* with a *Transfer Status* of *In Process*.
2. Navigate to the *Transfer Logs* view.
3. Select *More* and choose *Revoke Transfer*. The transfer status is set to *Not Started* and you can delete it.

9 Involved Parties

As an administrator, learn how to configure and use involved parties—the people you interact with in business transactions.

You can determine involved parties for business transactions using party roles and the connected determination rules. This determination allows you to streamline team assignments. It also ensures that business partners are correctly assigned to business documents in a way that matches your company process.

Business partner is the collective term for all the companies and people you interact with in your business, and includes accounts, contacts, partners, and employees. When you create a document, you can designate a business partner as an involved party and assign them a role.

You can designate roles for sales quotes, leads, opportunities, service tickets, or activities. You can then automatically determine involved parties for these business transactions using determination rules and master data.

Example

You can create a sales quote and add the employee as the *Ship-to party*. In this case, the employee is the business partner, and *Ship-to* is the party role.

9.1 Scope and Configure Involved Parties

Administrators can configure involved parties using scoping, scoping questions, and fine-tuning activities.

Scoping questions and fine-tuning activities that are self-explanatory may not be included in this list.

Involved Parties Prerequisites

> **i Note**
>
> If you use determination from relationships for custom parties, ensure you apply the following prerequisites in your system.

- You have already maintained relationships in the *General Business Partners* fine-tuning activity. Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *General Business Partners* ❯ to create and adapt any custom relationships you plan to use in your involved party determination.
- You have assigned these relationships between accounts, contacts, partners, and partner contacts from the appropriate details screen on the *Involved Party Relationships* tab.

Go to ▌▶ *Business Configuration* > *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Open Activity List* > *Fine-Tune* ▌ and search for the desired business transaction activity such as, *Involved Parties for Registered Product*, *Leads*, *Sales Quotes*, *Opportunities*, and click *Maintain Involved Parties.*

9.1.1 Define Involved Party Roles

As an administrator, you can configure which party roles you want to use in your application.

Context

Some party roles have been set to mandatory by default and cannot be deactivated. You will notice these since the fields are grayed out.

If you use involved parties for opportunities, place a checkmark in the *Internal* field. The *Internal* checkmark allows the system to control if the party can only be added to the opportunity *Sales Team* section

Procedure

1. Go to ▌▶ *Business Configuration* > *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Open Activity List* > *Fine-Tune* ▌ and search for the desired business transaction activity.
2. Click *Maintain Involved Parties.*
3. Ensure that the roles that are used in your business are activated.

   The *Party Role* selection can be controlled from *Code List Restrictions*. This is helpful in cases where a party role depends on the document type. The party schema itself is not document type dependent.
4. Click *Add Row* and enter the details for your new custom party role.

   First, navigate to ▌▶ *Fine Tune* > *Party Role Definition* ▌ to define new party roles. Standard party roles cannot be assigned to the party schema by the administrator or key user, but the predelivered one should fulfill most requirements.
5. Click in the *Mandatory* checkbox to define if a party role is mandatory for a document.

   If you define a role as mandatory, users cannot save transactions in the document. The error message prevents users from saving the transaction.

   The defined system behavior benefits the user because they can still completely save their current data entry in the document. If a mandatory party is missing which for example, prevents the creation of a follow-up sales order from a sales quote, the document contains inconsistent details.

   Preventing save on errors in party processing can only be achieved using custom coding in the SAP Cloud Applications Studio.
6. Select the *Unique* checkbox and only one party role can exist once in a document.

   If parties are determined from an account relationship, the system copies only the main relationship into the document.

If you try to add more than one party role, an error message is displayed, but the system allows users to save the inconsistent transaction.

7. Select the *Forbid Manual Changes* checkbox.

   As a recommendation, you can restrict the party role from the selection using *Code List Restrictions*. Party roles that are not automatically determined can still be deleted. The *Forbid Manual Changes* flag also restricts the maintenance of document addresses in the transaction of the effected party role.

8. In the *Inbound Integration* field, select *Exclude* to replicate documents with SAP ERP/SAP CRM. By selecting *Exclude*, your system avoids party redetermination in SAP Cloud for Customer during inbound processing. In this case, the party ownership belongs to the on-premise system. When changes are performed afterwards in SAP Cloud for Customer, party redetermination is still be executed.

9.1.2 Define Party Roles

Administrators can create new party roles to add to the company party schema. By defining party roles, you can assign employees to specific accounts. When creating new party role entries, the *Party Role Code* must begin with the letter z.

Procedure

1. Go to ▮▶ *Business Configuration* ❯ *Implementation Projects* ▮. Select your project and navigate to ▮▶ *Open Activity List* ❯ *Fine-Tune* ▮.
2. Search for and select *Party Role Definition*.
3. In the *Description* field, you can rename existing party roles. A change of description is valid for all assigned business objects.

   You can also use *Language Adaptation* tool to rename a party role.

   Since the following terms are used in transactions, rename the standard party roles *39- Employee Responsible* and *142- Employee Responsible - Sales to Owner*. *142- Employee Responsible - Sales* is used in account sales and territory teams and mapped to *39- Employee Responsible* in transactions. The *Party Category* field allows you to control certain business logic such as:
   - *Party Category Competitor Party* control, for example, the role selection on the opportunities *Competitor* tab.
   - *Party Category Approver Party* allows you to use this party role for work distribution in approval processes
   - *Category Other Org Unit Party* filter is only on organizational units for the party selection and allows determination via rules.
4. You can also define new relationship types in fine-tuning activity *General Business Partner*. This allows you to use party determination based on the account's relationship maintained in *Account* master record. The *Main* relationship to an account can be copied to the transaction, if the party role is part of the party schema and corresponding determination step is active.
5. If you select the *Responsibility Role* checkbox, you can add this party role to the *Account Team* and or *Territory Team*. If required, you can add this party role for party determination in the party schema.

6. Select *Sales Data* as required.

7. Select *Unique in Account Team* as required.

9.1.3 Configure - Take Over Party Determination for Standard Parties

Administrators can configure the determinations of standard party roles that allow you to differentiate if only the main party or all parties should be determined from the account team (territory team or an account relationship).

Context

In the solution, administrators can configure *Take Over* options in *Determination of Involved Parties* The configuration is not applicable for offline determination..

Procedure

1. Navigate to ▌▶ ▶ *Business Configuration* ❯ *Implementation Project* ❯ *Open Activity List* ❯ *Fine-Tune* ❯ *Sales Quotes (or the desired object)* ❯ *Involved Parties* ❯ *Maintain Involved Parties* ▐

2. Select the desired party role row such as *Ship-to*.

3. Click *Maintain Determinations* to open the *Determination of Involved Parties* window.

4. In the *Take Over* column select from the following drop down menu choices:
   ○ All parties.
   ○ Main party, otherwise arbitrary one.
   ○ Only main party.

5. Click *Ok* and save your entries.

9.1.4 Disable Party Determination When Merging Accounts

Administrators must scope the feature before you can use it.

To disable party determination when merging accounts, follow these steps:

1. Navigate to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▐ and select your project.

2. Go to ▌▶ *Edit Project Scope* ❯ *Questions* ❯ *General Business Data* ❯ *Business Partners* ❯ *Handling of Business Partner* ▐ and select following scoping question: *Do you want to disable the party redetermination during account merge for open transactions?*

9.2   Determine Involved Parties

Administrators can add, delete, activate, or deactivate predelivered determination steps for the selected party role. The determination steps appearing for the selected party roles depend on the configuration of the party role completed in fine-tuning activity *Party Role Definition.*

9.2.1 Define Involved Party Roles

As an administrator, you can configure which party roles you want to use in your application.

Context

Some party roles have been set to mandatory by default and cannot be deactivated. You will notice these since the fields are grayed out.

If you use involved parties for opportunities, place a checkmark in the *Internal* field. The *Internal* checkmark allows the system to control if the party can only be added to the opportunity *Sales Team* section

Procedure

1. Go to ▌▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▌▶ *Open Activity List* ❭ *Fine-Tune* ❭ and search for the desired business transaction activity.
2. Click *Maintain Involved Parties.*
3. Ensure that the roles that are used in your business are activated.

    The *Party Role* selection can be controlled from *Code List Restrictions*. This is helpful in cases where a party role depends on the document type. The party schema itself is not document type dependent.
4. Click *Add Row* and enter the details for your new custom party role.

    First, navigate to ▌▶ *Fine Tune* ❭ *Party Role Definition* ❭ to define new party roles. Standard party roles cannot be assigned to the party schema by the administrator or key user, but the predelivered one should fulfill most requirements.
5. Click in the *Mandatory* checkbox to define if a party role is mandatory for a document.

    If you define a role as mandatory, users cannot save transactions in the document. The error message prevents users from saving the transaction.

    The defined system behavior benefits the user because they can still completely save their current data entry in the document. If a mandatory party is missing which for example, prevents the creation of a follow-up sales order from a sales quote, the document contains inconsistent details.

    Preventing save on errors in party processing can only be achieved using custom coding in the SAP Cloud Applications Studio.

6. Select the *Unique* checkbox and only one party role can exist once in a document.

   If parties are determined from an account relationship, the system copies only the main relationship into the document.

   If you try to add more than one party role, an error message is displayed, but the system allows users to save the inconsistent transaction.

7. Select the *Forbid Manual Changes* checkbox.

   As a recommendation, you can restrict the party role from the selection using *Code List Restrictions*. Party roles that are not automatically determined can still be deleted. The *Forbid Manual Changes* flag also restricts the maintenance of document addresses in the transaction of the effected party role.

8. In the *Inbound Integration* field, select *Exclude* to replicate documents with SAP ERP/SAP CRM. By selecting *Exclude*, your system avoids party redetermination in SAP Cloud for Customer during inbound processing. In this case, the party ownership belongs to the on-premise system. When changes are performed afterwards in SAP Cloud for Customer, party redetermination is still be executed.

9.2.2 Configure - Take Over Party Determination for Standard Parties

Context

In the solution, administrators can configure *Take Over* options in *Determination of Involved Parties* The configuration is not applicable for offline determination..

Procedure

1. Navigate to ▎▸ ▸ *Business Configuration* ▸ *Implementation Project* ▸ *Open Activity List* ▸ *Fine-Tune* ▸ *Sales Quotes (or the desired object)* ▸ *Involved Parties* ▸ *Maintain Involved Parties* ▸
2. Select the desired party role row such as *Ship-to*.
3. Click *Maintain Determinations* to open the *Determination of Involved Parties* window.
4. In the *Take Over* column select from the following drop down menu choices:
   ○ All parties.
   ○ Main party, otherwise arbitrary one.
   ○ Only main party.
5. Click *Ok* and save your entries.

9.2.3 Activate or Deactivate Determinations Steps for Involved Parties

Administrators can activate or deactivate predelivered determination steps for the selected party role.

> **i Note**
>
> We recommend deactivating determination steps not needed for your business.

1. Navigate to the *Fine-Tune* party role such as *Sales Quotes*, *Leads*, *Opportunities* ▷ *Maintain Involved Party* ▷ *Party Role Assignment.* ▷
2. Click *Add Row.*
3. Add custom party roles to a party schema.
4. If you no longer require specific party roles, delete them.

   > **i Note**
   >
   > You can only remove custom party roles from your party schema. As an alternative, you can deactivate them.

   > **i Note**
   >
   > Only active party roles appear in the *Involved Parties* value help.

5. Click ▷ *Maintain Determinations* ▷ *Activate* ▷ or *Deactivate* the desired party roles.

9.3 Predelivered Combinations of Involved Parties and Business Partners

Learn about the predelivered party roles and recommendations for assigning business partners to party roles combinations.

Party Role	Description	Business Partner
Account	A party that purchases goods or services.	Account or Individual Customer
Competitor	A party that competes for sales in the same target market.	Account or Individual Customer
Contact	A party that is the contact in a document.	Contact or Partner Contact
Ship-to	A party to which goods or services are supplied.	Account or Individual Customer

Party Role	Description	Business Partner
Bill-to	A party that receives the bill for the goods or services supplied.	Account or Individual Customer
Sender	A party from whom the message originates.	Employee, Contact, Partner Contact, or Individual Customer
Recipient	A party that is to receive a message.	Employee, Contact, Partner Contact, or Individual Customer
Recipient (CC)	A party that is to receive a copy of a message.	Employee, Contact, Partner Contact, or Individual Customer
Recipient (BCC)	A party that is to receive a copy of a message without the other recipients' knowledge.	Employee, Contact, Partner Contact, or Individual Customer
Service and Support Team	A party that is responsible for the processing of customer complaints.	Organizational Unit with Function 'Customer Service'
Sales Partner	A party that initiates and performs business transactions for another company.	Partner
Partner Contact	An employee of a sales partner.	Partner Contact
Payer	A party that pays for goods or services.	Account or Individual Customer
Organizer	A party that is responsible for the organization of an appointment.	Employee, Contact, Partner Contact, or Individual Customer
Attendee	A party that is required as an attendee of an appointment.	Employee, Contact, Partner Contact, or Individual Customer
Employee Responsible	A party that is responsible for something. Often, this employee also has tasks to fulfill or is responsible for updating the document. The party can be an internal or external employee.	Employee or Partner Contact
Processor	A party that processes a task or a ticket.	Employee or Partner Contact
Activity Contact	A party that has a reference to the current activity.	Contact or Partner Contact
Service Performer	A party that performs services.	Employee or Partner Contact
Sales Unit	An organizational unit that is responsible for the sales and distribution of products in business processes.	Organizational Unit with Function 'Sales'

Party Role	Description	Business Partner
Call Participant	A party that participates in real-time communication, for example, a phone call or Internet chat session.	Employee, Contact, Partner Contact, or Individual Customer
Sales Employee	A party that is included in the sales department of an enterprise, or that carries out sales tasks.	Employee or Partner Contact
Organizational Unit	An element of your organizational model that is assigned to an activity.	Organizational Unit

9.3.1 Define Party Roles

Administrators can create new party roles to add to the company party schema. By defining party roles, you can assign employees to specific accounts. When creating new party role entries, the *Party Role Code* must begin with the letter **z**.

Procedure

1. Go to ▎▶ *Business Configuration* ❯ *Implementation Projects* ▎. Select your project and navigate to ▎▶ *Open Activity List* ❯ *Fine-Tune* ▎.
2. Search for and select *Party Role Definition*.
3. In the *Description* field, you can rename existing party roles. A change of description is valid for all assigned business objects.

   You can also use *Language Adaptation* tool to rename a party role.

   Since the following terms are used in transactions, rename the standard party roles *39- Employee Responsible* and *142- Employee Responsible - Sales to Owner*. *142- Employee Responsible - Sales* is used in account sales and territory teams and mapped to *39- Employee Responsible* in transactions. The *Party Category* field allows you to control certain business logic such as:
   - *Party Category Competitor Party* control, for example, the role selection on the opportunities *Competitor* tab.
   - *Party Category Approver Party* allows you to use this party role for work distribution in approval processes
   - *Category Other Org Unit Party* filter is only on organizational units for the party selection and allows determination via rules.
4. You can also define new relationship types in fine-tuning activity *General Business Partner*. This allows you to use party determination based on the account's relationship maintained in *Account* master record. The *Main* relationship to an account can be copied to the transaction, if the party role is part of the party schema and corresponding determination step is active.

5. If you select the *Responsibility Role* checkbox, you can add this party role to the *Account Team* and or *Territory Team*. If required, you can add this party role for party determination in the party schema.

6. Select *Sales Data* as required.

7. Select *Unique in Account Team* as required.

9.4 Add Involved Parties Roles to Relevant Business Objects

Administrators can learn how to add new or existing party roles to business objects such as leads, opportunities, and quotes.

Context

To use new or existing roles, you add new party roles to the relevant business object in the associated fine-tuning activity. You can add party roles to sales quotes, leads, opportunities, service tickets, or activities.

Procedure

1. Go to *Business Configuration*, and the relevant fine-tuning activity for sales quotes, leads, opportunities, service tickets, or activities.

2. Choose *Maintain Involved Parties.*

3. Click *Add*, *Edit*, or *Delete roles.*

   Predelivered party roles cannot be renamed or reassigned. If you checked *Forbid Manual Changes*, the automatically determined role and *employee* cannot be changed.

   If you checked *Forbid Manual Changes*, the automatically determined role and employee cannot be modified.

4. To decide how the role is assigned, click *Maintain Determinations.*

   If you add a new role, determinations are added automatically.

   If you add a new role, determinations are added automatically.

   You cannot add determinations yourself, but you can enable or disable the determinations the system proposes.

   If you see more than one determination step, then the system uses the enabled steps in order.

   > ⁂ Example
   >
   > The *Employee responsible* role for an opportunity might first determined by the step *Employee Responsible of Account Team*, then the step *Employee Responsible of Territory Team*. Then, when an opportunity is created, the system first looks for the *employee responsible* for the *account* of the

> created opportunity. If the system finds an *employee responsible* for the *account team*, that person is determined to be the involved party for the opportunity. If no *employee responsible* was listed for the account, the determination continues and finds the *employee responsible* listed for the territory, who then becomes the involved party for the opportunity.

9.5 Merge Accounts Without Party Determination

You can disable party determination when merging accounts.

This allows you to keep all involved parties and organizational data, such as territory or owner (employee responsible) in transactions when merging account.

> i Note
>
> You can also trigger a manual party redetermination in the transaction if the transaction supports manual party redetermination.

9.5.1 Disable Party Determination When Merging Accounts

Administrators must scope the feature before you can use it.

To disable party determination when merging accounts, follow these steps:

1. Navigate to ▮▶ *Business Configuration* ❭ *Implementation Projects* ❭ and select your project.
2. Go to ▮▶ *Edit Project Scope* ❭ *Questions* ❭ *General Business Data* ❭ *Business Partners* ❭ *Handling of Business Partner* ❭ and select following scoping question: *Do you want to disable the party redetermination during account merge for open transactions?*

9.6 Involved Parties FAQs

Having trouble using involved parties? Check this list of questions and answers for help.

9.6.1 Are involved party role consistency checks performed?

There are several consistency checks performed when a business partner is used in a party role for a document based on the party role category. Administrators can go to fine-tuning activity to set-up or change a *Party Role* definition.

For example, partner role category *Competitor Party* only allows you to enter the business partner type *Competitor*.

There are some checks that determine if you can change a party role, administrators can set an involved party to read-only in business configuration to ensure consistency in your company business processes.

9.6.2 Which party roles are copied when creating new documents from existing ones?

In most cases, when you create a new document based on an existing document, the involved parties are copied to the new document.

When creating new documents from existing ones, the involved parties are copied to the new document unless the party role is the employee responsible or the sales unit. Instead, the system triggers a new determination for these roles in the new document.

If you created an involved party role, it is also copied to a new document, assuming the role has also been added to the target document. For example, you created a party role and added it to a sales quote, then created an item from that sales quote. Now you add the role to the items for the role to be copied.

9.6.3 How are party roles determined?

Learn what to do to determine party roles in your documents.

When you first create a document such as a sales quote, initially, no parties are assigned. Once you enter an account, other involved party roles, such as the employee responsible, or ship-to party, are determined automatically.

In addition, you can manually change these parties, if your system is set up to allow you to change them.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◗. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ◗ and search for the desired business transaction activity.

> **i Note**
>
> Party roles are automatically determined again when a document is changed, unless the party has been manually changed.

9.6.4 Can you define extension fields for involved parties for quotes?

Key users can define extension fields for involved parties tab from for sales quotes. Extension fields will be part of *Quote-Party-MDAV CODCQTPTYB*. There are also other data source that allow you to report in the involved parties.

9.6.5 How do you manage involved party error handling?

If you find that the system is determining involved parties incorrectly, or is unable to find involved parties, there are a few reasons for the error.

The party determination steps do not match your business case. You can enable and disable party determination rules to solve this issue.

The master data required to determine parties is missing or inconsistent. Make sure you have added the role to the correct business object and that you have maintained the responsibility and or relationship assignments

10 Activities

Activities are methods of recording information from interactions between business partners during the customer relationship lifecycle. Managing activities properly also gives transparency to other sales team members working on the same account.

In SAP Cloud for Customer, activities include appointments, e-mails, phone calls, and tasks. Visits are technically similar to appointments, and may also be considered a type of activity. They can be created in and associated with many other business objects in the solution.

| Phone Call | Task | E-Mail | Appointment | Visit |

ACTIVITIES

> ⁂ Example
>
> If a reseller has a question about a product that her company has just included in their product range, she may call your customer support center. The customer support representative logs the call as a phone call in the solution. The account information is part of the phone call record, so the phone call is associated with the account in the system. Depending on your system's setup, the customer service agent may be able to create a service ticket to follow up on a phone call that has taken place. Any relevant emails and appointments can also be associated with the same account. Later on, you can use the associated activities to trace the progress of the issue and its resolution.

10.1 Scope and Configure Activities

Administrators can configure activities using scoping, scoping questions, and fine-tuning activities.

Scoping questions and fine-tuning activities that are self-explanatory may not be included in this list.

> → Recommendation
>
> When you log on as an administrator, you can find the scoping questions under ▯▶ *Business Configuration* ▶ *Implementation Projects* ▶. Select your project and navigate to ▯▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *Account and Activity Management* ▶ *Activity Management* ▶.
>
> We recommend that you review all the scoping questions in the areas that are relevant and that you have included in your scope. When you select a question, more information appears in the details section of the screen.

10.1.1 Enable Activities

Before users can manage different activities in the solution, administrators must add them to the scope of the project.

Procedure

1. Go to ▐▶ *Business Configuration* ❯ *Implementation Projects* ◀▌. Select your project and navigate to ▐▶ *Edit Project Scope* ❯ *Scoping* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ◀▌ and check the box next to the scoping item for using activity management.
2. Go to ▐▶ *Business Configuration* ❯ *Implementation Projects* ◀▌. Select your project and navigate to ▐▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ◀▌ and enable scoping questions for recording appointments, e-mails, phone calls, tasks, and activity lists in the system.
3. Assign the *Activities* work center view (ID: *COD_ACTIVITIES*) to appropriate business users or roles.

   For more details, please check Create Business Roles and Assign Work Centers and Views.

10.1.2 Configure Categories

Administrators can maintain categories that classify your elements such as activities, leads, and opportunities.

Go to ▐▶ *Business Configuration* ❯ *Implementation Projects* ◀▌. Select your project and navigate to ▐▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Activities* ❯ *Maintain Categories* ◀▌ to edit your categories.

> **i Note**
>
> This list is used for activities, leads, and opportunities, depending on your scoping. If you modify an entry in one area, then the entry is modified in the others as well.
>
> If you delete entries that are used in documents, the technical codes remain in the documents. Only the code descriptions are removed.

Related Information

Configure Assignment of Categories [page 601]

10.1.3 Configure Assignment of Categories

Administrators must activate any custom categories that they have created by assigning them to corresponding activity types.

> **i Note**
>
> Create or update categories before they appear in the list for assignment.

To assign your custom categories to item types, go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▌▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Activities* ❯ *Assign Categories* ▐ to assign categories for appointments, e-mails, tasks, and phone calls.

Related Information

Configure Categories [page 600]

10.1.4 Configure Document Types

Administrators can create custom activity types to streamline filtering, define reports, or facilitate assignments.

Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▌▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Activities* ❯ *Maintain Document Types* ▐ to edit your activity types.

> **i Note**
>
> You cannot delete document types that are used in activities.

10.1.5 Configure Involved Parties

Administrators can maintain involved parties for appointments, e-mails, phone calls, or tasks by activating applicable party roles and determination steps.

Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▌▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Activities* ❯ *Involved Parties for <Item Type>* ❯ *Maintain Involved Parties for <Item Type>* ▐ to edit your involved parties.

> **i Note**
>
> In addition to certain predelivered party roles, you can also assign customized party roles to activities. As prerequisites, you must go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▌▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Party Role Definition* ▐ to define customized party roles.

> Only customized party roles that are created under *Sales Employee Party*, *Partner Contact Party*, or *Other Party* categories can be assigned to activities.

Related Information

Define Involved Party Roles [page 590]

10.1.6 Configure System Message Severity

Administrators upgrade or downgrade the severity level of system messages in appointments, e-mails, phone calls, and tasks.

Go to ▶ *Business Configuration* ▶ *Implementation Projects* ▶. Select your project and navigate to ▶ *Open Activity List* ▶ *Fine-Tune* ▶ *Activities* ▶ *Messages for <Item Type>* ▶ *Message Severity Configuration for <Item Type>* ▶ to edit message severity.

10.1.7 Configure Selection of Sales Area Data Combinations

Administrators can enable users to select a combination of sales area data including sales organization, distribution channel, and division during activity creation. The combinations must be predefined in either or both of the matching account and employee in the *Accounts* and *Employees* work centers.

Go to ▶ *Business Configuration* ▶ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *Account and Activity Management* ▶ *Activity Management* ▶ and enable the scoping question about specifying a predetermined combination of sales area data.

10.1.8 Configure Default Sales Area Data During Activity Creation

Administrators can set up the solution to pre-populate sales area data including sales organization, distribution channel, and division during activity creation. The default values must be predefined in either or both of the matching account and employee in the *Accounts* and *Employees* work centers.

Go to ▶ *Business Configuration* ▶ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *Account and Activity Management* ▶ *Activity Management* ▶ and enable the scoping question about defaulting sales area data.

10.1.9 Configure Summary Generation for Activities and Visits

Administrators can enable users to generate summaries as a record of an activity or visit.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◀. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ◀ and enable the scoping question about using summaries as meeting minutes for appointments, phone calls, and visits.

10.1.10 Configure Prevention of Sending Summaries to External Parties

Administrators can restrict users to share activity or visit summaries with internal parties only.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◀. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ◀ and enable the scoping question about preventing summaries from being sent to external parties.

10.1.11 Configure Survey and Task Determination and Execution for Phone Calls

Administrators can enable sales operations or account managers to assign standard surveys and tasks to phone calls using activity plans and routing rules. The configuration also allows sales representatives to execute surveys and tasks during phone calls.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◀. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ◀ and enable the scoping question about executing surveys and tasks during phone calls.

10.1.12 Configure Sender Information for Outbound E-Mails

For outbound e-mails, administrators can set up the system to display the sender's e-mail address only, instead of the sender's e-mail address "on behalf of" an automated system e-mail address.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◀. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ◀ and enable the scoping question about using only the employee's e-mail address as the sender.

10.1.13 Configure Default Duration for Activities During Creation

Administrators can specify default durations that are pre-populated in appointment, phone call, and task creation.

Go to ▌ *Business Configuration* ❯ *Implementation Projects* ▌. Select your project and navigate to ▌ *Open Activity List* ❯ *Fine-Tune* ❯ *Date Profiles* ▌. Under *Activities*, set default duration for appointments, phone calls, and tasks.

10.1.14 Configure Automatic Generation and Sharing of Activity Summaries

Administrators can set up the system to automatically generate and send appointment or phone call summaries using workflow rules.

Prerequisites

You have maintained appointment or phone call summary templates in the *Form Template Maintenance* work center. For more information, please see Form Templates.

Context

The procedure includes mandatory steps to automatically generate and send an appointment or phone call summary. You can define other optional fields based on your business requirements as needed.

Procedure

1. Go to ▌ *Administrator* ❯ *Workflow Rules* ▌, and click *New*.
2. Give a meaningful name in the *Description* field.
3. For *Business Object*, choose *Appointment* or *Phone Call*.
4. For the *Timing* type, you can choose from *On Create Only*, *On Every Save*, and *Scheduled*. If the timing field is left blank, *On Every Save* is applied by default.
5. Click *Next* to define conditions as needed.

   For example, you can set up the system to trigger the rule when the status of an appointment or phone call is set to *Completed*.

6. Click *Next* to define actions.

7. For *Rule Type*, choose *E-Mail*.

8. Enter the *Subject* of the summary e-mail.

9. Choose a template html file that contains content of the summary e-mail.

10. To include a PDF summary as an attachment, select the appointment or phone call summary template and variant that you have maintained.

11. Under *Recipient Determination*, click *Add Determination* and choose recipients.

    For example, you can send appointment summaries to all the appointment attendees and send phone call summaries to all the phone call participants.

12. Click *Next* to review your workflow rule.

13. *Activate* the workflow rule.

10.1.15 Configure Automatic E-Mail Delivery Receipts

Administrators can set up the system to automatically send an immediate acknowledgment of an incoming e-mail using workflow rules.

Prerequisites

You have enabled and maintained communication channels for both inbound and outbound e-mails. For more information, please see E-Mail Communication Channel.

Context

The procedure includes mandatory steps to set up an e-mail delivery confirmation. You can define other optional fields based on your business requirements as needed.

Procedure

1. Go to ▌ *Administrator* ❯ *Workflow Rules* ▌, and click *New*.

2. Give a meaningful name in the *Description* field.

3. For *Business Object*, choose *E-Mail*.

4. For the *Timing* type, you can choose from *On Create Only*, *On Every Save*, and *Scheduled*. If the timing field is left blank, *On Every Save* is applied by default.

5. Click *Next* to define conditions as needed.

    For example, you can set up the system to trigger the rule for all incoming e-mails with an open status.

6. Click *Next* to define actions.

7. For *Rule Type*, choose *E-Mail*.

8. Enter the *Subject* of the e-mail delivery receipt.

9. Choose a template html file that contains content of the e-mail delivery receipt.

10. Under *Recipient Determination*, click *Add Determination* and choose *Message From*.

11. Click *Next* to review your workflow rule.

12. *Activate* the workflow rule.

10.1.16 Configure Restriction on Downloading Activities by Role

Administrators can disable certain business roles to export activities to Microsoft Excel.

Procedure

1. Go to ▋▶ *Administrator* ❭ *General Settings* ❭ *Business Roles* ▋.

2. Select the desired role and click *Edit*.

3. Navigate to the *Fields and Actions* tab.

4. Under *Business Action Restrictions*, add a row.

5. Search for *XLS_CRM_ACT_LIST* and select the entry.

   The *Access Restriction* field defaults to *Disabled*.

10.1.17 Configure Formatting Editor for Appointment Notes

Administrators can activate a rich text editor to allow you to use formatting in appointment notes.

Log on as an administrator and go to ▋▶ *Business Configuration* ❭ *Implementation Projects* ▋. Select your project and navigate to ▋▶ *Edit Project Scope* ❭ *Questions* ❭ *Sales* ❭ *Account and Activity Management* ❭ *Activity Management* ▋, and select the scoping question: *Do you want to use formatted text for appointments?*

Related Information

Format Notes Text in Appointments [page 610]

10.2 Appointments

Appointments are planned activities that appear in calendars, including external appointments and scheduled meetings with business partners who may or may not be customers. Appointments contain the details that you expect, such as information about the attendees, as well as the date and time.

From a technical standpoint, visits are also a type of appointment and behave similarly. Visits contain more details, such as promotions, tasks, surveys, planograms, notes from the last visit, or follow-up items.

You can use appointments to keep track of meetings and record them in your SAP solution:

- Focus on certain activities, such as my appointments today, with predefined queries.
- See your appointments on your calendar in the SAP solution. Attendees can also see your appointments on their calendars.
- When you add a contact or attendee to an appointment, that party's details appear in the appointment even if there is no defined business relationship between the party and the account involved in the appointment.
- Reference a campaign with a specified response option.
- If your company uses one of the e-mail add-ins, appointments can be synchronized to and from your inbox.

If your administrator enables a few features, you can do even more:

- Generate a summary of an appointment in PDF format. Use the summary as an internal record or send it to participants as meeting minutes.

Set Out-of-Office Indicator for Appointments [page 608]
> You can define appointments to visually mark your time out of the office in your calendar.

Display Private Appointments with a Lock Icon [page 608]
> Private appointments synchronized from groupware are distinctly visualized with a lock icon. You can see private appointments both in the list and on the calendar to avoid scheduling conflicts. However, you cannot reschedule a private appointment or open it for further details due to privacy concerns.

Generate and Send Activity Summaries Using Rules [page 609]
> The system can automatically generate appointment or phone call summaries and send them to desired recipients.

Format Notes Text in Appointments [page 610]
> You can use a rich text editor (RTE) to format text in the notes of appointments in SAP Cloud for Customer.

Related Information

E-Mail Add-Ins [page 933]
Visits [page 638]

10.2.1 Set Out-of-Office Indicator for Appointments

You can define appointments to visually mark your time out of the office in your calendar.

Use the *Show As* field to indicate *Out of Office*. The appointment appears in SAP Cloud for Customer in your calendar and the team calendar highlighted in purple.

> ⁜ Example
>
> You plan to attend a trade show on Wednesday, Thursday, and Friday. To communicate to your colleagues that you are not available on those days, you can create an appointment for the trade show and mark it as *Out of Office*.

If you use one of the groupware add-ins for Microsoft Outlook, Gmail, or IBM Notes, the systems synchronize the out-of-office setting. Just create an appointment in your groupware calendar, mark it as out of office, and add it to your SAP solution. When the appointment is synchronized, your out-of-office setting in your groupware calendar automatically sets the out-of-office indicator in SAP Cloud for Customer.

Related Information

E-Mail Add-Ins [page 933]

10.2.2 Display Private Appointments with a Lock Icon

Private appointments synchronized from groupware are distinctly visualized with a lock icon. You can see private appointments both in the list and on the calendar to avoid scheduling conflicts. However, you cannot reschedule a private appointment or open it for further details due to privacy concerns.

To see the lock icon, your administrator must add the *Private* column via adaptation.

> i Note
>
> This enhancement only applies to client-side appointments synchronized from groupware. There is no change in behavior for other private activities such as e-mails and tasks.

10.2.3 Generate and Send Activity Summaries Using Rules

The system can automatically generate appointment or phone call summaries and send them to desired recipients.

As prerequisites, administrators must create a workflow rule to define conditions that an activity should meet for the summary to be generated and sent, and select a predefined form template as the summary PDF attachment.

10.2.3.1 Configure Automatic Generation and Sharing of Activity Summaries

Administrators can set up the system to automatically generate and send appointment or phone call summaries using workflow rules.

Prerequisites

You have maintained appointment or phone call summary templates in the *Form Template Maintenance* work center. For more information, please see Form Templates.

Context

The procedure includes mandatory steps to automatically generate and send an appointment or phone call summary. You can define other optional fields based on your business requirements as needed.

Procedure

1. Go to ▌▶ *Administrator* ❯ *Workflow Rules* ▐, and click *New*.
2. Give a meaningful name in the *Description* field.
3. For *Business Object*, choose *Appointment* or *Phone Call*.
4. For the *Timing* type, you can choose from *On Create Only*, *On Every Save*, and *Scheduled*. If the timing field is left blank, *On Every Save* is applied by default.
5. Click *Next* to define conditions as needed.

   For example, you can set up the system to trigger the rule when the status of an appointment or phone call is set to *Completed*.
6. Click *Next* to define actions.
7. For *Rule Type*, choose *E-Mail*.
8. Enter the *Subject* of the summary e-mail.
9. Choose a template html file that contains content of the summary e-mail.
10. To include a PDF summary as an attachment, select the appointment or phone call summary template and variant that you have maintained.
11. Under *Recipient Determination*, click *Add Determination* and choose recipients.

    For example, you can send appointment summaries to all the appointment attendees and send phone call summaries to all the phone call participants.
12. Click *Next* to review your workflow rule.
13. *Activate* the workflow rule.

10.2.4 Format Notes Text in Appointments

You can use a rich text editor (RTE) to format text in the notes of appointments in SAP Cloud for Customer.

If your adminstrator has made the necessary settings, you can use a formatting editor to add structure and emphasis to appointment notes.

> **i** Note
>
> When you activate this feature, it's no longer possible to edit notes in the list of appointments directly. You can edit notes in the following views: create, quick create, and appointment details.

> **i Note**
>
> If you've integrated one of the e-mail add-in solutions for SAP Cloud for Customer, any formatting that you add to the notes of appointments is lost when those appointments are synchronized to or from the add-in.
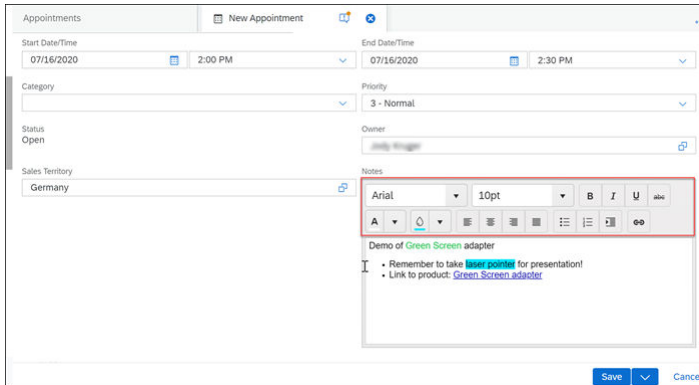
Related Information

Configure Formatting Editor for Appointment Notes [page 606]
Compare E-Mail Add-In Solutions [page 934]

10.2.4.1 Configure Formatting Editor for Appointment Notes

Administrators can activate a rich text editor to allow you to use formatting in appointment notes.

Log on as an administrator and go to ▌▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▌▶ *Edit Project Scope* ❭ *Questions* ❭ *Sales* ❭ *Account and Activity Management* ❭ *Activity Management* ❭, and select the scoping question: *Do you want to use formatted text for appointments?*

Related Information

Format Notes Text in Appointments [page 610]

10.3   E-Mails

You can use e-mails in your SAP solution. If your company uses one of the e-mail add-ins, e-mails are synchronized to and from your inbox.

Your SAP solution can help you save time with e-mails:

- You can create outbound e-mails from the *Activities* tab in accounts, contacts, individual customers, leads, opportunities, and sales quotes.
- For outbound e-mails, a *Bounced* field is available to indicate when an e-mail is not successfully delivered due to, for example, server or domain issues.
- If you use one of the e-mail add-ins, you can reference associated items in your SAP solution right from your e-mail inbox.
  Following synchronization to your SAP solution, e-mail details can no longer be edited.
- In offline mode, you can view your e-mails as read-only.

If your administrator enables a few features, you can do even more:

- In outbound e-mails, by default, the sender information shows the employee's e-mail address "on behalf of" an automated system e-mail address. If needed, the system e-mail address can be removed.

Create Default E-Mail Signatures [page 613]
> You can create e-mail signatures for personal or corporate use, and maintain a default signature that automatically populates in your outgoing messages.

Create E-Mail Templates [page 614]
> You can create e-mail templates for business objects including accounts, contacts, individual customers, leads, opportunities, sales orders, and sales quotes. When creating e-mails from respective objects, you can save time by using those predefined templates.

Send E-Mail Delivery Receipts Using Rules [page 615]
> When an e-mail message is delivered to your e-mail list in SAP Cloud for Customer, the system can automatically send a delivery confirmation to the sender.

View E-Mails with Original Formatting and Structure [page 616]
> *E-Mail Viewer* allows you to read e-mails without losing their original formatting and structure. You can view inline images, theme fonts, links, and so on.

Report on Unassociated E-Mails [page 617]
> By using the e-mail data source, you can specify the *Initiating Email* characteristic along with the *Service Request Block Reason* characteristic to create a report on all the unassigned e-mails.

Related Information

E-Mail Add-Ins [page 933]

10.3.1 Create Default E-Mail Signatures

You can create e-mail signatures for personal or corporate use, and maintain a default signature that automatically populates in your outgoing messages.

Prerequisites

Administrators have enabled the *Templates* work center.

Context

Procedure

1. Go to *Templates* and click the plus icon.
2. Enter *Name* and *Template Text*.
3. To further edit and format the signature, click *Save and Open*.
4. Use formatting tools to edit your signature.
5. Administrators can create corporate standard signatures using placeholders.

    The values of the placeholders are dynamically populated based on logged in user credentials.
6. When you finish, click *Save*.
7. Under your profile menu, click ▎▶ *Settings* ❯ *My Email Settings* ▐.
8. Click the pencil icon, and choose one default signature for new e-mails.
9. When you finish, click *Save and Close*.

Results

When you create e-mails, you can see a default signature pre-populated in the e-mail editor.

> → Tip
>
> If you want to use a different signature for a particular e-mail, you can remove the default signature and click the sign button to choose another signature.

10.3.2 Create E-Mail Templates

You can create e-mail templates for business objects including accounts, contacts, individual customers, leads, opportunities, sales orders, and sales quotes. When creating e-mails from respective objects, you can save time by using those predefined templates.

Prerequisites

Administrators have enabled the *Templates* work center.

Context
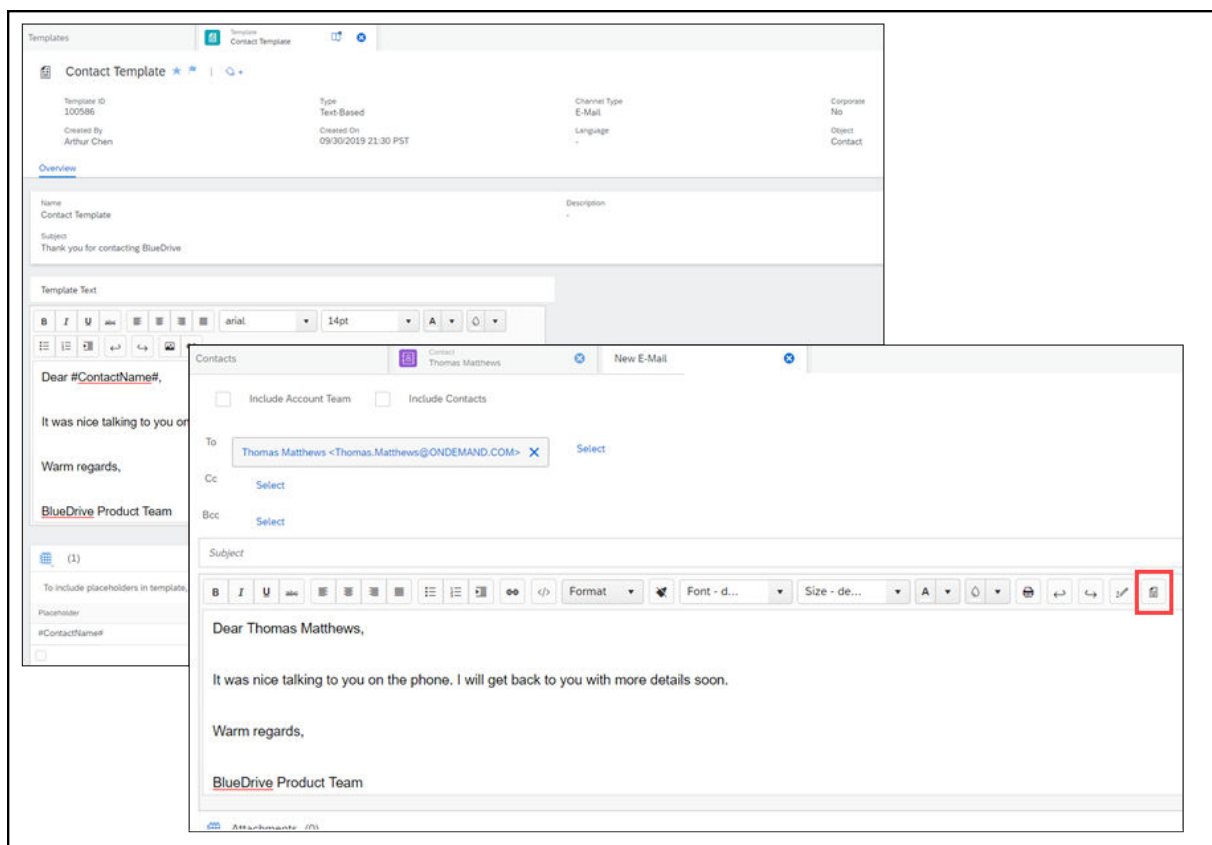
Procedure

1. Go to *Templates* and click the plus icon.

2. Give it a *Name*.

3. For template usage, choose *Response*.

4. Select the *Object* that the template is created for.

   This template can only be used when an e-mail is created from the chosen business object.

5. Enter *Subject* and *Template Text*.

6. To further edit and format the template, click *Save and Open*.

7. Use formatting tools to edit your template.

8. If needed, define and add placeholders to the template.

   The values of the placeholders are dynamically populated when you choose the template during e-mail creation.

9. When you finish, click *Save*.

Results

In the business object, go to *Activities* and create an e-mail. From the editing toolbar, you can click the e-mail template icon to find the predefined template.

10.3.3 Send E-Mail Delivery Receipts Using Rules

When an e-mail message is delivered to your e-mail list in SAP Cloud for Customer, the system can automatically send a delivery confirmation to the sender.

As a prerequisite, administrators must create a workflow rule to define conditions that an incoming message should meet for a receipt to be sent.

10.3.3.1 Configure Automatic E-Mail Delivery Receipts

Administrators can set up the system to automatically send an immediate acknowledgment of an incoming e-mail using workflow rules.

Prerequisites

You have enabled and maintained communication channels for both inbound and outbound e-mails. For more information, please see E-Mail Communication Channel.

Context

The procedure includes mandatory steps to set up an e-mail delivery confirmation. You can define other optional fields based on your business requirements as needed.

Procedure

1. Go to ▌ *Administrator* ▶ *Workflow Rules* ▌, and click *New*.
2. Give a meaningful name in the *Description* field.
3. For *Business Object*, choose *E-Mail*.
4. For the *Timing* type, you can choose from *On Create Only*, *On Every Save*, and *Scheduled*. If the timing field is left blank, *On Every Save* is applied by default.
5. Click *Next* to define conditions as needed.

   For example, you can set up the system to trigger the rule for all incoming e-mails with an open status.
6. Click *Next* to define actions.
7. For *Rule Type*, choose *E-Mail*.
8. Enter the *Subject* of the e-mail delivery receipt.
9. Choose a template html file that contains content of the e-mail delivery receipt.
10. Under *Recipient Determination*, click *Add Determination* and choose *Message From*.
11. Click *Next* to review your workflow rule.
12. *Activate* the workflow rule.

10.3.4 View E-Mails with Original Formatting and Structure

E-Mail Viewer allows you to read e-mails without losing their original formatting and structure. You can view inline images, theme fonts, links, and so on.

As a prerequisite, your administrator must add the *E-Mail Viewer* tab via adaptation.

> **i Note**
>
> This feature is only available in e-mails that are synchronized to and sent from SAP Cloud for Customer after May 2019.
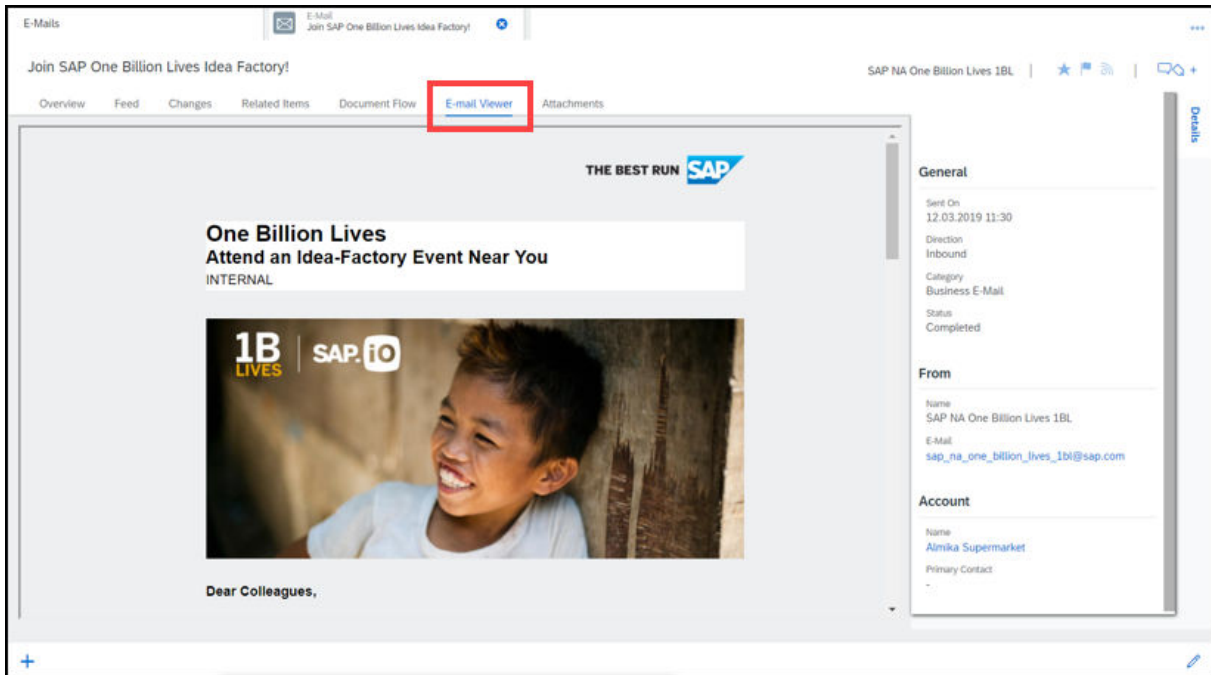
10.3.5 Report on Unassociated E-Mails

By using the e-mail data source, you can specify the *Initiating Email* characteristic along with the *Service Request Block Reason* characteristic to create a report on all the unassigned e-mails.

An unassociated e-mail is identified when:

- *Initiating Email* = # (Not Assigned)
- *Service Request Block Reason* is filled (except code *0 Other Reason* and *8 System not set up to support employee tickets*)

You can also view unasociated e-mail messages with the *All My Team's E-Mails* query in the ticket list.

10.4 Phone Calls

You can use phone-call activities to track and document your phone calls with business partners in the SAP solution.

You can use phone calls like this:

- Reference a campaign with a specified response option.

If your administrator enables a few features, you can do even more:

- Generate a summary of a phone call in PDF format. You can use the summary as an internal record or you can send it to participants as meeting minutes.
- Your administrator can assign tasks and surveys to phone calls, using activity plans and routing rules. Tasks and surveys are predefined in activity plans by your system administrator. They can be general checklists, industry-specific surveys, or recommended tasks to complete during the call.

> **i Note**
>
> Tasks and surveys for phone calls are not available offline.

- Your administrator can use workflow rules to send notifications to participants in a phone call to alert them of a change in the phone call.

  Add Surveys or Tasks to Phone Calls [page 619]
      You may have mandatory or voluntary activity plans such as surveys and tasks predefined and assigned by your administrators to help you craft sales call script and execute outbound telesales strategies efficiently.

  Generate and Send Activity Summaries Using Rules [page 620]
      The system can automatically generate appointment or phone call summaries and send them to desired recipients.

  Report on Phone Call Surveys or Tasks [page 622]
      You can utilize *Activity BTD Reference* data source together with *Survey Answer* or *Activity Task* data source to report on survey or task data captured for activities.

Related Information

Workflows [page 148]

10.4.1 Add Surveys or Tasks to Phone Calls

You may have mandatory or voluntary activity plans such as surveys and tasks predefined and assigned by your administrators to help you craft sales call script and execute outbound telesales strategies efficiently.

> i Note
>
> As a prerequisite, your administrators must enable survey and task execution during phone calls in scoping questions.

In the *Activity Planner* work center, your administrators can enable automatic assignment for activity plans during creation and define routing rules.

For activity plans that can be automatically assigned, surveys and tasks are added to applicable phone calls upon a background job that runs every 10 minutes. You can manually trigger routing by refreshing to obtain most current surveys or tasks.

For activity plans that cannot be automatically assigned, you can manually add applicable surveys under the *Surveys* tab and tasks under the *Tasks* tab in a phone call.

> i Note
>
> Tasks and surveys for phone calls are not available offline.

Related Information

[Activity Planning and Routing [page 704]](#)

10.4.1.1 Update To-Do Surveys or Tasks by Refreshing

You can obtain most current surveys and tasks assigned to your phone calls by refreshing.

Prerequisites

Your administrators have defined activity plans and routing rules in the *Activity Planner* work center.

> i Note
>
> For each survey or task to be routed, the *Assign Automatically* option must be checked during the creation of the activity plan.

Context

Applicable activity plans are automatically assigned to phone calls upon a background job that runs every 10 minutes. As users, you can also follow the steps below to manually trigger the routing.

Procedure

1. Go to the detail view of a phone call.
2. From the *Actions* menu, select *Refresh Phone Call*.

Results

Your applicable surveys and tasks appear under the *Surveys* and *Tasks* tabs as a result of rules.

10.4.1.2 Configure Survey and Task Determination and Execution for Phone Calls

Administrators can enable sales operations or account managers to assign standard surveys and tasks to phone calls using activity plans and routing rules. The configuration also allows sales representatives to execute surveys and tasks during phone calls.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ❯ and enable the scoping question about executing surveys and tasks during phone calls.

10.4.2 Generate and Send Activity Summaries Using Rules

The system can automatically generate appointment or phone call summaries and send them to desired recipients.

As prerequisites, administrators must create a workflow rule to define conditions that an activity should meet for the summary to be generated and sent, and select a predefined form template as the summary PDF attachment.

10.4.2.1 Configure Automatic Generation and Sharing of Activity Summaries

Administrators can set up the system to automatically generate and send appointment or phone call summaries using workflow rules.

Prerequisites

You have maintained appointment or phone call summary templates in the *Form Template Maintenance* work center. For more information, please see Form Templates.

Context

The procedure includes mandatory steps to automatically generate and send an appointment or phone call summary. You can define other optional fields based on your business requirements as needed.

Procedure

1. Go to ▌▶ *Administrator* ❯ *Workflow Rules* ▌, and click *New*.
2. Give a meaningful name in the *Description* field.
3. For *Business Object*, choose *Appointment* or *Phone Call*.
4. For the *Timing* type, you can choose from *On Create Only*, *On Every Save*, and *Scheduled*. If the timing field is left blank, *On Every Save* is applied by default.
5. Click *Next* to define conditions as needed.

   For example, you can set up the system to trigger the rule when the status of an appointment or phone call is set to *Completed*.
6. Click *Next* to define actions.
7. For *Rule Type*, choose *E-Mail*.
8. Enter the *Subject* of the summary e-mail.
9. Choose a template html file that contains content of the summary e-mail.
10. To include a PDF summary as an attachment, select the appointment or phone call summary template and variant that you have maintained.
11. Under *Recipient Determination*, click *Add Determination* and choose recipients.

    For example, you can send appointment summaries to all the appointment attendees and send phone call summaries to all the phone call participants.
12. Click *Next* to review your workflow rule.
13. *Activate* the workflow rule.

10.4.3 Report on Phone Call Surveys or Tasks

You can utilize *Activity BTD Reference* data source together with *Survey Answer* or *Activity Task* data source to report on survey or task data captured for activities.

Following topics show you how to create a joined data source with activities and surveys (or tasks), and how to create a report on phone call surveys (or tasks).

10.4.3.1 Create a Joined Data Source with Activities and Surveys (or Tasks)

The procedure includes mandatory steps to create a joined data source with activities and surveys (or tasks). You can define other optional fields based on your business requirements as needed.

Procedure

1. Go to ▌ *Business Analytics* ❯ *Design Data Sources* ▌.
2. Click ▌ *New* ❯ *Joined Data Source* ▌.
3. Give it a name and description if desired.
4. For *Join Type*, select *Left Outer Join*.
5. Click *Add Data Source* and add *CODACTBTDB* for *Activity BTD Reference*.
6. Select the fields that you want to include in the new data source. Following fields are mandatory to create joins and filter across activity types.
   - Activity Type
   - Category
   - BTD Reference
   - BTD Reference ID
   - BTD Reference Item (only required for joining *Survey Answer* data source)
   - BTD Reference Role Code
   - BTD Reference Type
7. Click *Add Data Source* and add *FNDQREVQVB* for *Survey Answer* (or *CODTKAHB* for *Activity Task*).
8. Select the characteristics and key figures that you want to include in the data source. Following fields are mandatory to create joins and filter for activity survey answers (or activity tasks).

   For Activity Survey Answers:
   - Document Type
   - Document UUID
   - Survey ID (to retrieve information for all the surveys maintained in activities)
   - Value Collection UUID (to retrieve information for surveys that have been answered only)

For Activity Tasks:

- ○ Task
- ○ Task ID

9. Join corresponding fields. Examples are as follows:

Join Activity BTD Reference with Survey Answer

Joined Data Source Fields	Activity BTD Reference	Survey Answer
BTD Reference ID	BTD Reference ID	Survey ID
BTD Reference Item	BTD Reference Item	Value Collection UUID

Join Activity BTD Reference with Activity Task

Joined Data Source Fields	Activity BTD Reference	Activity Task
BTD Reference	BTD Reference	Task
BTD Reference ID	BTD Reference ID	Task ID

10. Remove duplicate rows.

> ⁂ Example
>
> If *Survey ID* is joined to *BTD Reference ID* as shown above, then you must remove the row with *Survey ID* as *Joined Data Source Fields*.

11. Click *Save and Close*.

Related Information

SAP Cloud for Customer Analytics Guide

10.4.3.2 Create a Report on Phone Call Surveys (or Tasks)

The procedure includes mandatory steps to create a report on phone call surveys (or tasks). You can define other optional fields based on your business requirements as needed.

Procedure

1. Select the joined data source you have created with activities and surveys (or tasks).
2. Click ▶ *New* ▶ *Report* ▶.
3. Give it a name and description if desired.

4. Click *Next* and select key figures if desired.

5. Click *Next* and select characteristics if desired.

6. Under *Characteristic Properties*, following fields are mandatory to be maintained with *Fixed Value Selection* or *Using Variable*.

   ○ Activity Type
   ○ BTD Reference Type
   ○ Category (optional)
   ○ Document Type (only required for reporting on activity surveys)

7. If you choose *Fixed Value Selection*, click *Set Fixed Value Selections* and maintain values for mandatory fields as follows:

> → Tip
>
> If you intend to report on surveys (or tasks) for a single activity type such as phone call, it is recommended that you set fixed values as below. If you want to reuse the same report for analyzing surveys (or tasks) for all supported activity types, you can only maintain *BTD Reference Type* as fixed value and enter the activity type during runtime.

Set Fixed Values for Phone Call Surveys

Characteristic	Fixed Value
Activity Type	86 (Phone Call)
BTD Reference Type	1876 (Survey)
Document Type	86 (Phone Call)

Set Fixed Values for Phone Call Tasks

Characteristic	Fixed Value
Activity Type	86 (Phone Call)
BTD Reference Type	542 (Task)

8. Click *Next* and define variables if desired.

9. Click *Next* and review report details.

10. Click *Finish*.

Related Information

[SAP Cloud for Customer Analytics Guide](#)

10.5 Tasks

Tasks help you plan your time effectively. You can also use them to design processes or best practices. Tasks are a tool for recording your work or for remembering what you still need to do.

You can create either standalone tasks or tasks that are associated with other business objects in your SAP solution. You can associate a task with an object by creating the task from the object such as accounts, leads, and opportunities. As an administrator, you can associate tasks with phone calls or visits, using activity plans and routing rules.

Other features that are specific to tasks include:

- Reference a campaign with a specified response option.
- You can use the advanced search to exclude tasks that are associated with visits, which can help you focus on the tasks you need.
- The due date for one-time tasks is the same as the due date of the activity plan under which they were created.
- If your company uses one of the email add-ins, tasks can be synchronized to and from your inbox.
- When you set a task to 100% complete, the solution automatically enters the current date as the completion date.

  Mass Update Task Processor and Owner from the List [page 625]
  > You can quickly change the processor and owner of multiple tasks at once from the list, which saves your efforts in going to the detail view of each task to make changes.

  Create a Task for Multiple Employees [page 627]
  > You can create a task, and then duplicate the same task for multiple owners.

Related Information
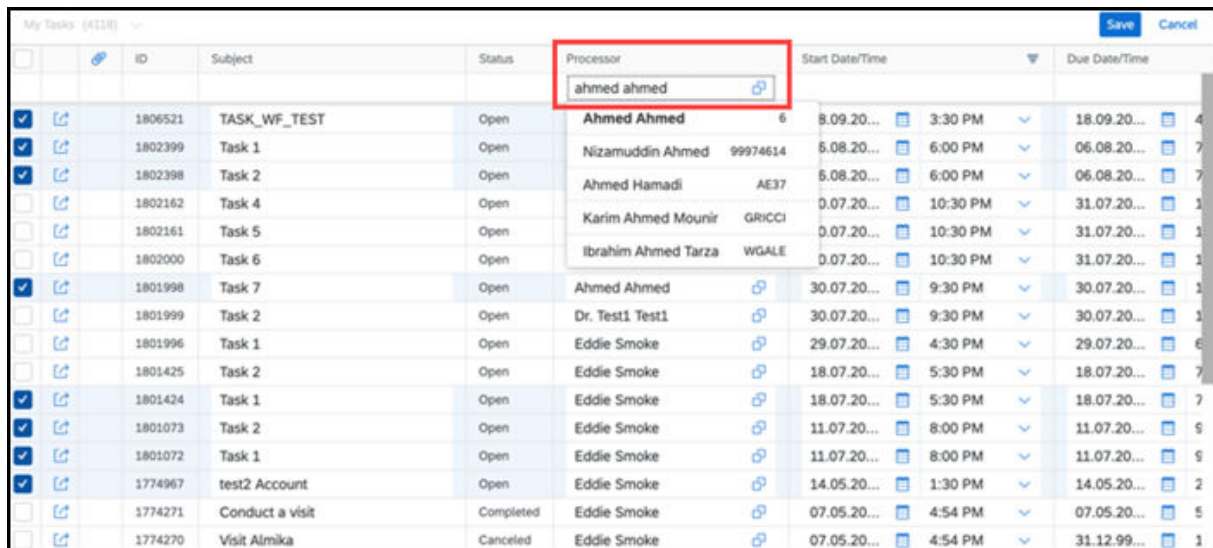
10.5.1 Mass Update Task Processor and Owner from the List

You can quickly change the processor and owner of multiple tasks at once from the list, which saves your efforts in going to the detail view of each task to make changes.

Prerequisites

Administrators must go to *Company Settings* and toggle on the option to *Enable Editing in Dataset*.

Context

Procedure

1. In the task list, click the pencil icon to launch the edit mode.

   An empty row appears at the top of the task list.

2. Select multiple tasks of which you want to change the processor and owner.

3. Set the processor and owner in the empty row to a desired value.

4. Click *Save*.

10.5.2 Create a Task for Multiple Employees

You can create a task, and then duplicate the same task for multiple owners.

Context

Procedure

1. Create a task.
2. In the detail view of the task, click ▶ *Actions* ▶ *Duplicate Task* ▶.
3. Select one or multiple owners, and click *OK*.

10.6 Activity Lists

An activity list is a collection of activities of a certain type. You can use template-based activity lists to organize and mass create appointments, phone calls, or tasks.

Create Activity Lists [page 628]
> You can create a group of appointments, phone calls, or tasks at once.

Add Activities to Activity Lists [page 629]
> You can add individual activities to an existing activity list, for reference purposes.

10.6.1 Create Activity Lists

You can create a group of appointments, phone calls, or tasks at once.

Prerequisites

Administrators must enable activity lists in scoping questions under *Activity Management*.

Procedure

1. Go to *Activity Lists* and create a new activity list.
2. Select the *Type* that determines the type of all the activities to be created.
3. Enter a meaningful name, as well as default *Start Date/Time* for the first activity to begin.
4. Click *Save and Open*.
5. Define template details to derive default settings for all the activities to be created, including *Subject*, *Category*, and *Priority*.
6. Define default *End Date/Time* when you want to create parallel appointments or tasks.

   If end date and time is defined, all activities are created with the same start and end date and time.
7. Define default *Duration* and *Gap* between activities when you want to create activities in a logical sequence.

   > **❖ Example**
   >
   > Let's say your first activity starts at 8:00 a.m. If the duration is set to 1 hour and the gap is 30 minutes, then the next activity will start at 9:30 a.m.

8. To assign the owner of each individual activity based on the account, check the *Owner Determination* flag.
9. Add notes and attachments that appear for every activity generated from this activity list.
10. Add accounts, contacts, or individual customers to the activity list, which automatically generates activities.

    If you create activities by adding contacts, the contacts are automatically added to involved parties as attendees or participants in the activities generated.
11. If needed, you can change activity settings at each line item.
12. When you finish, *Save* your entries.

10.6.2 Add Activities to Activity Lists

You can add individual activities to an existing activity list, for reference purposes.

Procedure

1. Go to *Appointments*, *Phone Calls*, or *Tasks*.
2. Select one or multiple activities that you want to group into an activity list.
3. Click ▶ *More* ▶ *Add to Activity List* ▶.
4. Choose the desired activity list.
5. Click *OK*.

10.7   Activities Offline

This topic presents an overview of features supported for activities in offline mode. Activities create, edit and display is supported in the offline mode.

APPOINTMENTS

Offline scope

Tab	Section	Field	Create Screen		Detailed View	
			Create	Default	Display	Edit (direct/via actions/via Navigation)
Overview	Header	Subject	Y	Y	Y	Y
		Document Type	Y	Y	Y	N
		ID			Y	N
		Status	Y	NA	Y	Y
		Account	Y	N	Y	Y
		Primary Contact	Y	Y	Y	Y
		Organizer	Y	Y	Y	Y
		Location	Y	N	Y	Y

Tab	Section	Field	Create Screen		Detailed View	
			Create	Default	Display	Edit (direct/via actions/via Navigation)
		Location Line 2	Y	N	Y	Y
		All Day Event	Y	N	Y	Y
		Start Date/ Time	Y	Y	Y	Y
		End Date/Time	Y	Y	Y	Y
		Category	Y	Y	Y	Y
		Priority	Y	Y	Y	Y
		Owner	Y	Y	Y	Y
		Created On			Y	NA
		Created By			Y	NA
		Last Changed On			Y	NA
		External ID			Y	NA
		Sales Territory	Y	N	Y	Y
		Activity List			Y	NA
		Sales Organiza- tion	Y	N	Y	Y
		Distribution Channel	Y	N	Y	Y
		Division	Y	N	Y	Y
		Extension Fields	Y	N	Y	Y
		Attendees	Y	N		
		Notes	Y	N		
	Attachments	Attachments			Y	Y

Tab	Section	Field	Create Screen		Detailed View	
						Edit (direct/via actions/via Navigation)
			Create	Default	Display	
	Involved Parties	Role/Name/ Phone/E-mail/ Address			Y	Y
	Notes	Notes	Y	N	Y	Y
Follow-Up Items					Y	Y
Related Items					N	N

Offline Actions

Object	Tab/Global	Action	Offline Availability
Appointment	Global	Set as In Process	Y
		Set as Complete	Y
		Set as Canceled	Y
		Generate Summary	N
		Add Attachments	Y
		Add Involved Parties	Y

TASKS

Offline Scope

Tab	Section	Field	Create Screen		Detailed View	
						Edit (directly, via actions or via naviga-tions)
			Create	Default	Display	
Overview	Header	Document Type	Y	Y	Y	Y
		ID			Y	N
		Status	Y	Y	Y	Y
		Subject	Y	Y	Y	Y
		Processor	Y	Y	Y	Y

Tab	Section	Field	Create Screen		Detailed View	
			Create	Default	Display	Edit (directly, via actions or via navigations)
		Start Date/ Time	Y	Y	Y	Y
		Due Date/Time	Y	Y	Y	Y
		Date Completed			Y	N
		Planned Duration	Y	N	N	N
		Actual Duration			N	N
		Completion (%)	Y	Y	Y	Y
		Category	Y	Y	Y	Y
		Priority	Y	Y	Y	Y
		Account	Y	N	Y	Y
		Primary Contact	Y	Y	Y	Y
		Owner	Y	Y	Y	Y
		Created On			Y	NA
		Created By			Y	NA
		Last Changed On			Y	NA
		External ID			Y	NA
		Sales Territory	Y	N	Y	Y
		Activity List			Y	NA
		Sales Organization	Y	N	Y	Y
		Distribution Channel	Y	N	Y	Y

Tab	Section	Field	Create Screen		Detailed View	
			Create	Default	Display	Edit (directly, via actions or via navigations)
		Division	Y	N	Y	Y
		Extension Fields	Y	N	Y	Y
		Notes	Y	N		
	Attachments				Y	Y
	Involved Parties	Role/Name/ Phone/Email/ Address			Y	Y
	Notes				Y	Y

Offline Actions

Object	Global / Tab	Actions	Offline Availability
Task	Global	Set to In Process	Y
		Set to Complete	Y
		Set to Cancelled	Y
		Add Attachment	Y
		Add Involved Party	Y

PHONE CALLS

Offline Scope

Tab	Section	Field	Create Screen		Detailed View	
			Create	Default	Display	Edit(direct /via actions/ via navigations)
Overview	Header	Document Type	Y	Y	Y	Y
		ID			Y	N
		Status	Y	Y	Y	Y

Tab	Section	Field	Create Screen		Detailed View	
			Create	Default	Display	Edit(direct /via actions/ via navigations)
		Subject	Y	Y	Y	Y
		Organizer	Y	Y	Y	Y
		Start Date/ Time	Y	Y	Y	Y
		End Date/Time	Y	Y	Y	Y
		Direction	Y	Y	Y	N
		Category	Y	Y	Y	Y
		Priority	Y	Y	Y	Y
		Account	Y	N	Y	Y
		Primary Contact	Y	Y	Y	Y
		Owner	Y	Y	Y	Y
		Campaign	Y	N	Y	N
		Response Option			Y	Y
		Created On			Y	NA
		Created By			Y	NA
		Last Changed On			Y	NA
		External ID			Y	NA
		Sales Territory	Y	N	Y	Y
		Ticket ID			N	N
		Activity List			Y	N
		Sales Organization	Y	N	Y	Y

Tab	Section	Field	Create Screen		Detailed View	
			Create	Default	Display	Edit(direct /via actions/ via navigations)
		Distribution Channel	Y	N	Y	Y
		Division	Y	N	Y	Y
		Extension Fields	Y	N	Y	Y
		Notes	Y	N		
	Attachments				Y	Y
	Participants	Role/Name/ Phone/Email/ Address			Y	Y
	Notes				Y	Y

Offline Actions

Object	Global / Tab	Actions	Offline Availability
Phone Call	Global	Set as In Process	Y
		Set Complete	Y
		Set as Canceled	Y
		Generate Summary	N
		Add Attachment	Y
		Add Participant	Y

10.8 Activities FAQ

Having trouble using activities? Check this list of questions and answers for help.

10.8.1 Why is the calendar of an account useful?

The calendar view of an account shows all upcoming appointments between your company and that account in one calendar, even if they were scheduled by other colleagues. For example, you can check the account calendar to ensure that you're not scheduling a customer visit at the same time the customer has a meeting scheduled with another colleague.

10.8.2 Why does the account address appear as the location?

If the location is left blank when you save a new appointment, the solution uses the account's main address as the default location. You can update the appointment as necessary.

10.8.3 What if I need more space for the location of an appointment or visit?

The location in the system allows 80 characters. If the appointment was synchronized from the e-mail add-in, the solution copies the first 80 characters of the location. If you need more space for the location, you can use personalization to add a second line for the location.

If you personalize your appointment and visit display, when you synchronize an appointment or visit from the e-mail add-in, the rest of the characters (up to 255 characters total) appear in line 2.

If you enter location information in line 2 directly in the browser, there is no character limit.

10.8.4 What is the difference between canceling and deleting an activity?

Deleted activities disappear from the system. Canceled activities still appear in the system, which means that you can use them to track activities that were originally scheduled, but not completed.

If you use one of the e-mail add-ins, canceled activities are synchronized. In your e-mail inbox, a canceled activity and a deleted activity are reflected the same way. For example, for an appointment, if you are the organizer, the appointment is canceled and a cancellation is sent to participants.

Related Information

10.8.5 What is the difference between the activity planner and the visit planner?

The activity planner lets you create activity plans and routing rules for them. The visit planner helps you filter and determine which accounts you want to visit.

Use the activity planner to create an activity plan, which is a collection of tasks and surveys. You can also create routing rules to direct these collections to visits, opportunities, service tickets, or phone calls, for example.

Use the visit planner to determine which accounts to schedule for site visits. You can use filters such as accounts that are overdue for visits, or accounts within your region.

Routes offer the same features as the visit planner, plus some additional features such as plotting visits on a map. The routes feature allows you to plan visits for your employees more effectively.

> → Tip
>
> If you're a new customer or just start to use visits, we recommend using routes to plan visits.

10.8.6 What is an email blast?

An e-mail blast is a mass-e-mail tool that you can use to send information to a large group of recipients at the same time. For example, sales personnel may use e-mail blasts to send out quick informational e-mails to announce new products, send monthly newsletters, or call attention to a company blog.

To use e-mail blasts, your administrator must make the appropriate settings in your solution.

11　Visits

Companies use visit planning and execution to help sales personnel plan and record site visits and associated activities.
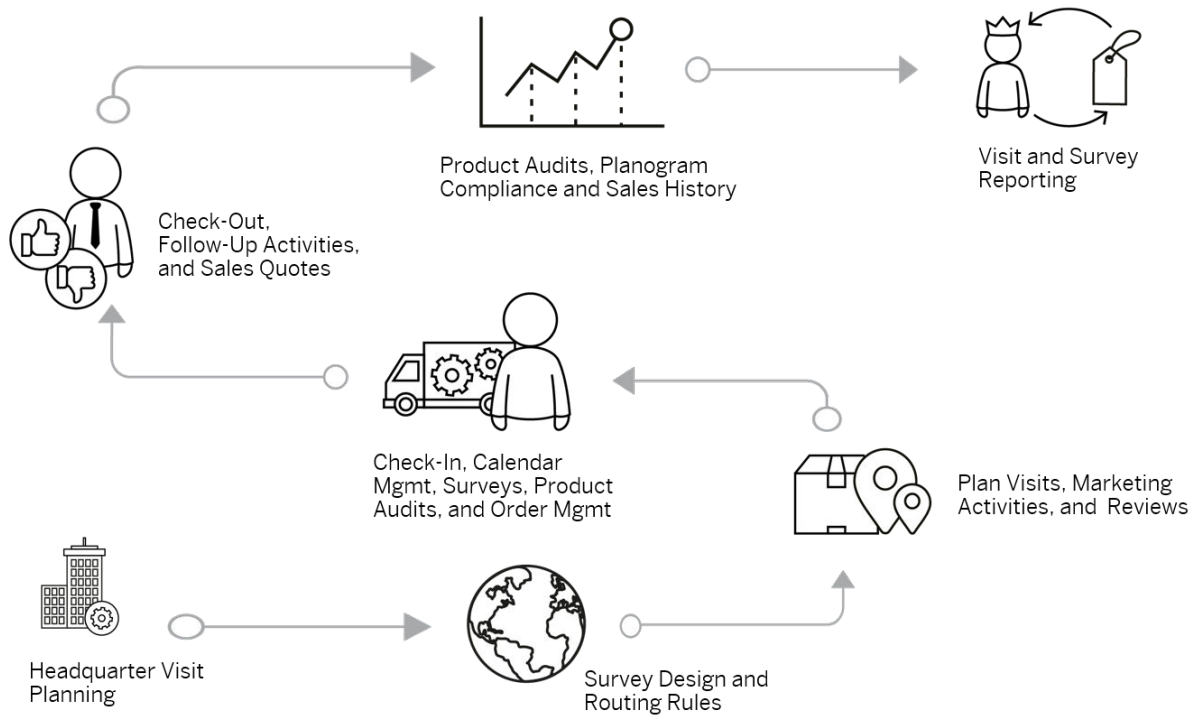
At your company headquarters, your management team knows that many visits have similarities. There are certain questions you ask frequently, about product popularity or sales statistics. There are certain things you do, such as checking the in-store display for correctness or ensuring that any demo products are working properly. Management captures these standard questions in surveys and the standard activities become tasks.

Management can create rules that add surveys and tasks to the appropriate visits. For example, sales personnel check in-store displays at every visit for account C, so management routes the in-store display task to all site visits for account C. When you or your sales manager plan and create visits, some tasks and surveys are assigned automatically, and you can add other assigned surveys and tasks as appropriate. You can even create your visit schedule by planning collections of visits called routes. Routes can span one day, a week, or even months.

When you visit the customer site, you can use visit features such as surveys, check-in/check-out, and tasks for collecting and recording key information in the system. For example, when you check in to the visit, the time, date, and location can be recorded in the system. As you work through the tasks and survey questions with the customer, the answers you enter are recorded in the system for this visit.

Often, there are follow-up activities that you must do after the visit, such as ordering a replacement part for a demonstration product. You can create such activities during the visit and follow up on them afterward. Later,

management can use tools – such as product audits, sales history, or reporting – to gauge the effectiveness of the planned visit strategy and adjust it accordingly.

11.1   Scope and Configure Visits

Administrators can configure visits using scoping, scoping questions, and fine-tuning activities.

Scoping questions and fine-tuning activities that are self-explanatory may not be included in this list.

> **i Note**
>
> Visits technically function as an appointment activity in the SAP solution.

11.1.1 Enable Visits

To use visits, administrators must add visits to the scope of the project.

Procedure

1. Go to ▎ *Business Configuration* ❯ *Implementation Projects* ▎. Select your project and navigate to ▎ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ▎ and check the box.
2. In the *Questions* step, under ▎ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ▎, answer the questions in the *Visits* section.
3. Assign the visits work center to the appropriate users or roles.

   All colleagues to whom you have assigned the visits work center can create and work with visits and use tools such as routes and the visit planner.

   The visit planner allows them to plan and schedule individual visits and routes. They can also use it to plan days or weeks of visits at a time, and use templates to save time and increase consistency.

11.1.2 Configure Check-In and Check-Out for Visits

If you want to use check-in and check-out, log on as an administrator and activate it in scoping.

> **→ Tip**
>
> **Decision Point**
>
> • Why use check-in and check-out?

- Check-in and check-out times and dates are recorded, and you can use a report to generate statistics for visits.
- In the scoping questions, you can specify that the sales or service representative must complete mandatory items before checking out.
- After the sales or service rep checks out, the visit is completed and cannot be changed. It is effectively checked off the rep's list.
- Why skip check-in and check-out?
  - The visit can be changed and updated after the sales or service rep leaves the customer site.
  - The rep is not forced to complete mandatory items before leaving the customer site.

Log on as an administrator and go to ▌▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▌▶ *Edit Project Scope* ❭ *Questions* ❭ *Sales* ❭ *Account and Activity Management* ❭ *Activity Management* ❭ and answer the questions for visits.

> → Tip
>
> **Test It!**
>
> 1. Log on as a user and create a new visit.
> 2. Access the visit, and check-in and check-out using the buttons.
>   If the buttons appear, your test is successful.

11.1.3 Configure Mandatory Completion of Tasks and Surveys at Check-Out

This business option lets you enforce the mandatory settings for surveys and tasks. If you use this option, your sales or service representatives must complete all the mandatory items within a visit before they can close the visit.

Log on as an administrator and go to ▌▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▌▶ *Edit Project Scope* ❭ *Questions* ❭ *Sales* ❭ *Account and Activity Management* ❭ *Activity Management* ❭ and in the *Visits* section, answer the question related to this option.

11.1.4 Configure Disablement of Visit Execution Before Check-In

As an administrator, if you set up this business option, users cannot edit specific visit information until they check in to the visit. This feature allows you to ensure that execution actions are completed during the visit.

Go to ▌▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▌▶ *Edit Project Scope* ❭ *Questions* ❭ *Sales* ❭ *Account and Activity Management* ❭ *Activity Management* ❭.

In the *Visits* section, find the relevant question and select the checkbox to indicate that you want to use this feature.

11.1.5 Configure Proximity Validation During Visit Check-In

Administrators can set up the solution to validate users' proximity to accounts' geolocation during visit check-in, ensure that users execute visits onsite, and improve transparency and alignment with business processes.

Procedure

1. Go to ▷ *Business Configuration* 〉 *Implementation Projects* ▷. Select your project and navigate to ▷ *Edit Project Scope* 〉 *Questions* 〉 *Sales* 〉 *Account and Activity Management* 〉 *Activity Management* ▷ to find the corresponding question and enable proximity validation for visits.

2. Go to ▷ *Business Configuration* 〉 *Implementation Projects* ▷. Select your project and navigate to ▷ *Open Activity List* 〉 *Fine-Tune* 〉 *Maintain Visit Check In Range* ▷ to configure check-in range by country/region.

> **i Note**
>
> The check-in range must be configured for the system to run proximity validation.

11.1.6 Configure Check-Out Prompt for Visits

Administrators can set up the solution to notify users when they leave the customer location without checking out of the visit. Checking out promptly can reduce data inconsistencies and ensure proper tracking of visit execution time.

Context

This feature is supported on both Android and Windows.

Procedure

1. Go to ▷ *Business Configuration* 〉 *Implementation Projects* ▷. Select your project and navigate to ▷ *Edit Project Scope* 〉 *Questions* 〉 *Sales* 〉 *Account and Activity Management* 〉 *Activity Management* ▷ to find the corresponding question and enable check-out prompt for visits.

2. Go to ▷ *Business Configuration* 〉 *Implementation Projects* ▷. Select your project and navigate to ▷ *Open Activity List* 〉 *Fine-Tune* 〉 *Maintain Visit Check-Out Range* ▷ to configure check-out range by country/region.

11.1.7 Configure "Create New Visit?" Prompt at Check-Out

Administrators can disable the "Create New Visit?" prompt when users check out from a visit. The configuration applies to both online and offline modes.

To disable this prompt, go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ▌.

Under *Visits*, answer the question about disabling the check-out prompt.

11.1.8 Configure Multiple Visit Check-In Prevention

As an administrator, you can set up your SAP solution to prevent users from checking into more than one visit at a time.

This option only allows visit owners to check in to a visit if they are not checked into any other visits at that time. If visit owners try to check into a visit when they are still checked in to another one, an error appears. The error lists the visit ID of the visit that they should check out of first.

> ⚠ Caution
>
> Use the data workbench to ensure that you start with a clean slate (with all visits checked out).
>
> 1. Temporarily deactivate any validation steps in scoping.
>   The data workbench honors any scoping validations, such as the mandatory completion of tasks or surveys before check-out. If you leave these validations in scope, the system prevents check-out for any visits that do not meet the validation criteria. Deactivating the validation steps in scoping effectively allows you to check out of all visits.
> 2. In the data workbench, on the *Export* tab, choose object *Visits | activity*.
> 3. To find all visits in your SAP solution that are not checked out of, set up these filters:
>
>   Select All Visits That Are Still Checked In
>
> | Field | Condition | Value |
> | --- | --- | --- |
> | *Check-In Date/Time* | Greater Than | \<date that you implemented the SAP solution> |
> | *Check-Out Date/Time* | Is Initial | None |
>
> 4. Export the resulting list of visits and set them to status *Completed*.
> 5. Import the same list of visits that now have status *Completed*.
> 6. Reactivate any validation steps in scoping.
>
> For more information about the data workbench, go to the SAP Help Portal at http://help.sap.com, search for "SAP Cloud for Customer", and under *Integration*, choose *Data Workbench* user guide.

Log on as an administrator and go to ▍▶ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▍▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ▐.

In the *Visits* section, for the question about preventing users from checking into multiple visits, select the checkbox to indicate that you want to use this feature.

11.1.9 Configure Visit Types

Administrators can configure visit types in fine-tuning activities.

Go to ▍▶ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▍▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Maintain Visit Types* ▐ to create or edit your visit types.

11.1.10 Configure Involved Parties

Administrators can maintain involved parties for appointments and visits by activating applicable party roles and determination steps.

Go to ▍▶ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▍▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Activities* ❯ *Maintain Involved Parties for Appointments* ▐ to edit your involved parties.

11.1.11 Configure System Message Severity

Administrators can upgrade or downgrade the severity level of system messages in appointments and visits.

Go to ▍▶ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▍▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Activities* ❯ *Message Severity Configuration for Appointments* ▐ to edit message severity.

11.1.12 Configure Default Duration for Visits During Creation

Administrators can specify the default duration that is pre-populated in visit creation.

Go to ▍▶ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▍▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Date Profiles* ▐. Under *Activities*, set default duration for visits.

11.1.13 Enable Surveys

Administrators can add *Surveys* to your project scope.

Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ▌ and check the box next to the scoping question for using surveys.

11.1.14 Enable Imaging Intelligence

As an administrator, before you set up imaging intelligence, add it to the scope of your project and enable it.

> **i Note**
>
> **Prerequisite**
>
> You have purchased SAP Cloud for Customer Imaging Intelligence.

Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ▌ and check the box.

In the *Questions* step, under ▌▶ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ▌, in the *Visits* section, select the checkbox to enable image recognition in your SAP solution.

11.1.15 Configure Imaging Intelligence

Administrators can upload product images and planograms so that imaging intelligence can compare them to actual shelf images.

Prerequisites

You have purchased SAP Cloud for Customer Imaging Intelligence.

Context

Log on as an administrator and go to ▌▶ *Administrator* ❯ *Sales and Campaign Settings* ❯ *Open Planocheck Administrator* ▌.

Procedure

1. Upload product images by choosing ▎▶ *Ricoh* ❯ ❯*Batch Upload*.
   1. Upload metadata as a CSV file.
   2. Upload images in ZIP files.

   The data and images become the baseline for each product that imaging intelligence uses for comparing with items on actual shelves.

2. On the *Planograms* tab, use the button to upload your planograms in .xls or .xlsx format.

   When you upload planograms, they have status *Created*, which means that Ricoh is analyzing them. When the analysis is complete, the planograms have status *OK*.

3. When the planogram reaches status *OK*, edit it to add the following information:

   1. *Attach Stores*
      Add each store in which you want to use this planogram.
   2. Activate it to replace any previous versions.
   3. Update it to save your changes.

4. On the *Manufacturers* tab, add manufacturers.

   On the screen that appears, enter the required information:
   1. Enter the manufacturer's name.
   2. Enter the manufacturer's code, which is the first 8 numbers of the UPC code for that manufacturer.
   3. Under *Customer*, make the appropriate setting:
      - *True* means that you want to display corrective actions for this manufacturer's products
      - *False* means that you do not want to display corrective actions for this manufacturer's products

11.1.16 Configure Time Window for Visits

When visits are created, all automatically assigned surveys or tasks are added immediately. Alternatively, you can choose to limit the amount of automatic assignments by limiting how far in the future the system should add surveys or tasks to visits. For example, if you define a window of 5 days, the system adds surveys and tasks to only those visits that fall within the next 5 days.

Log on as the administrator and go to ▎▶ *Business Configuration* ❯ *Implementation Projects* ▎. Select your project and navigate to ▎▶ *Open Activity List* ❯ *Fine-Tune* ▎ and add *Define Time Window to Add Surveys/Tasks to Visits* to your project.

Open this business object and enter the number of days that you want the system to look ahead when it adds automatically assigned tasks and surveys to visits.

> ❗ Restriction
>
> This feature does NOT apply to perfect store visits.

11.1.17 Configure Automatic Refresh for Visits

Administrators can use workflow rules to define when visits can be automatically refreshed to obtain an updated list of to-do surveys and tasks.

Context

By using workflow rules, applicable activity plans can be assigned with an automatic refresh on creating or saving a visit, or on a customized schedule.

Procedure

1. Go to ▌ *Administrator* ❯ *Workflow Rules* ▐ , and create a new workflow rule.
2. Give a meaningful name in the *Description* field.
3. For *Business Object*, choose *Visit*.
4. For the *Timing* type, you can choose from *On Create Only*, *On Every Save*, and *Scheduled*. If the timing field is left blank, *On Every Save* is applied by default.

   This selection decides when your rule, in this case *Refresh Visit*, is triggered.
5. (Optional) Define conditions that you can also configure in the *Routing Rules* section in the *Activity Planner* work center.
6. For *Rule Type*, choose *Action* and select *Refresh Visit*.
7. Review and activate your workflow rule.

11.1.18 Configure Visit Data Extracting and Archiving

Customers with large volumes of data can use a web service to define data within a certain date range, extract it, and then archive it.

Your SAP solution limits the numbers of visits and its tasks or surveys, in each tenant, to a maximum of 150 million records. When this maximum number is exceeded, your SAP solution marks the oldest data in your system for deletion. Data marked for deletion is kept in the system for 45 days, after which it is permanently deleted. You can proactively archive some of your data periodically using a web service to schedule extraction of a specified date range's data. Using OData services, you can extract data from your SAP solution into a target system for archiving, such as SAP BW.

11.1.19 Configure Formatting Editor for Visit Notes

Administrators can activate a rich text editor to allow you to use formatting in visit notes.

Log on as an administrator and go to ▮▶ *Business Configuration* ❯ *Implementation Projects* ▮. Select your project and navigate to ▮▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ▮, and select the scoping question: *Do you want to use formatted text for appointments?*

> **i** Note
>
> This feature is automatically enabled if you have enabled formatting notes for appointments.

Related Information

Format Notes Text in Visits [page 648]

11.2 Prepare for Visits

Before you visit a customer site, make sure that you have all the information you need, and that it is up to date.

Customer site visits are a part of creating and keeping good relationships with customers. They can also be a way to discuss, run, and monitor marketing activities, such as campaigns. You can use tools such as tasks, surveys, and campaigns to gather and record information from each customer visit.

Create or View Visits [page 647]
  Creating a visit or opening an existing one is the first step in capturing information on a customer site visit.

Maintain Visit Information [page 651]
  For each account or individual customer, you can define its availabilities for visiting, visit frequency, and duration. Such visit information can be further utilized when you create a single visit in accounts or plan routes.

Add Surveys or Tasks to Visits [page 654]
  You may have mandatory or voluntary activity plans such as surveys and tasks predefined and assigned by your administrators to help you execute your visits efficiently.

11.2.1 Create or View Visits

Creating a visit or opening an existing one is the first step in capturing information on a customer site visit.

On the *Visits* tab, you can open an existing visit or create a new one. You can also create or view visits from your calendar.

You can create individual visits or link them together in a route. In the *Visit Planner*, you can organize your visits for the day by selecting the accounts to visit and choosing ▶ *More* ▶ *Create Route* ▶.

Open this video in a new window

Related Information

Plan Visits Using Routes [page 675]
Configure Maps [page 160]

11.2.1.1 Maintain One-Time Address Within a Visit

In a visit, you can use the *Location Line 2* field to maintain an additional location that is only valid for this particular visit.

You have the option to go to another location for a visit, in case the visit is not possible to the address maintained under account data.

If you cannot visit the address maintained under account data, you can go to the additional location to complete the visit.

11.2.1.2 Format Notes Text in Visits

You can use a rich text editor (RTE) to format text in the notes of visits in SAP Cloud for Customer.

If your administrator has enabled the necessary settings, you can use a formatting editor to add structure and emphasis notes in visits.

> **i Note**
>
> When you activate this feature, it's no longer possible to edit notes in the list of visits directly. You can edit notes in the following views: create, quick view, and visit details.

> **i Note**
>
> If you've integrated one of the e-mail add-in solutions for SAP Cloud for Customer, any formatting that you add to the notes of visits is lost when the visits are synchronized to or from the add-in.

> **i Note**
>
> This feature is automatically enabled if you have enabled formatting notes for appointments.

Related Information

[Configure Formatting Editor for Visit Notes [page 647]](#)

11.2.1.3 Add or Edit Involved Parties in Activities or Visits

When you add or edit involved parties in activities or visits, you can see and edit any extension fields that your administrator has added for accounts, contacts, attendees, and other parties.

Related Information

[Add Involved Parties Roles to Relevant Business Objects [page 595]](#)

11.2.1.4 Configure - Add Account, Contact, or Employee Info to Involved Party Elements

For more transparency about participants who are involved in activities or visits, administrators can add extension fields from account, contact, and employee headers to any involved party element.

Context

You can include details relevant to the account or user for easy reference when viewing the parties involved for a specific activity or visit. You can enable this feature like this:

Procedure

1. Decide on an extension field from the account, contact, or employee header that you want to see in an involved party element.
2. Log on as an administrator and create or edit that extension field in the account, contact, or employee header.
3. On the *Extension Scenarios* tab, enable scenario *Business Partner – General Information to Activity – Party*.
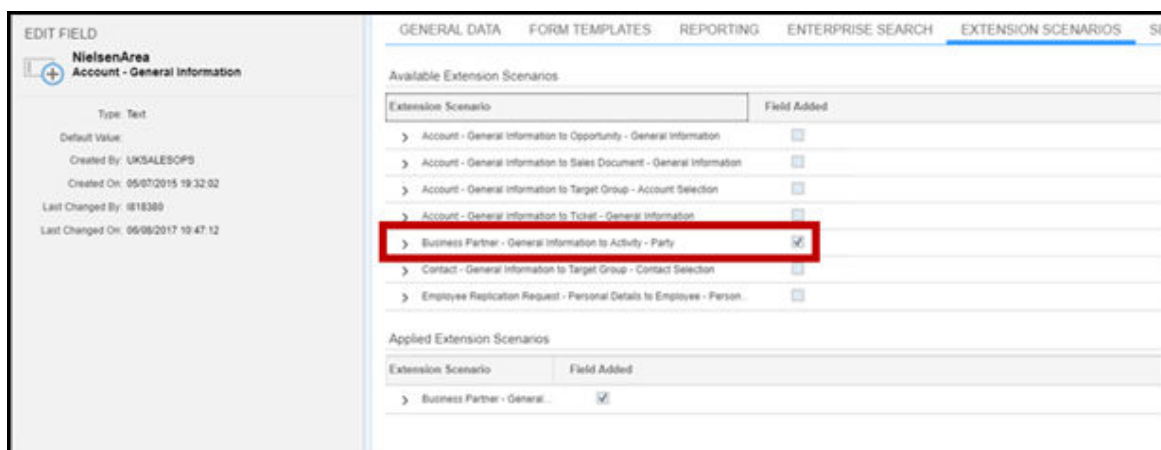
4. Go to an involved party element (tab or table) in an activity or visit. When you adapt that element, you can add the extension field that you enabled.

11.2.2 Maintain Visit Information

For each account or individual customer, you can define its availabilities for visiting, visit frequency, and duration. Such visit information can be further utilized when you create a single visit in accounts or plan routes.

11.2.2.1 Define Visiting Hours in Accounts

In each account, under *Visiting Hours*, you can specify days and hours when the customer is available for a visit.

When you plan visits for the account, the visit date and time are validated against the visiting hours, which helps you avoid scheduling conflicts.

11.2.2.2 Define Visit Frequency and Duration by Account

In each account or individual customer, under *Visits*, you can maintain visit frequency and duration for a general visit to the customer.

Visit information including *Recommended Frequency* and *Visit Duration* is used when:

- You create a visit **within** the account under the *Visits* tab.
- You add the account to a route without specifying visit type or sales data.
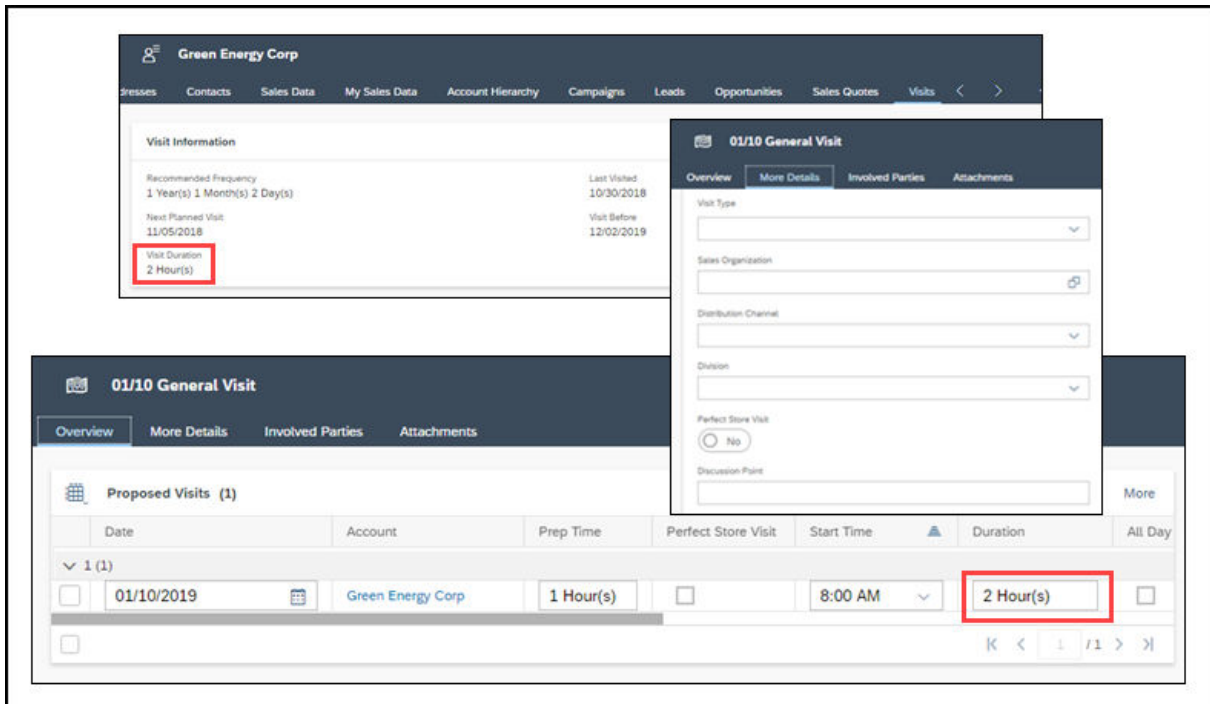
11.2.2.3 Define Visit Frequency and Duration by Visit Type and Sales Area

In each account or individual customer, under *Visits Details*, you can maintain visit frequency and duration for a specific visit type and sales area.

Visit Type allows you to categorize visits based on different business needs. Following are some use cases of leveraging visit type in visit planning.

- Store check once every week for 30 minutes
- Promotion compliance checks once a month for an hour
- Business review once every quarter for three hours

Visit information including *Recommended Frequency* and *Visit Duration* is used when:

- You create a visit **within** the account under the *Visits Details* tab.
- You add the account with a specified visit type and sales area to a route.

> **i** Note
>
> It is optional to define sales area for a visit type, and it is possible to add sales area that is independent of the account. However, if you do have sales area maintained for a visit type, in order for predefined visit frequency and duration to be considered during route planning, you must also maintain sales area under the *Sales Data* tab in the account.

11.2.2.4 Maintain Additional Location Field

You can maintain an additional location field within a visit.

Within a visit, you see the location information field from the account address data. You can maintain an additional location field within a visit. The additional location is only applicable for that particular visit. With the additional location information, you have the option to go to another location for a visit, in case the visit is not possible to the address maintained under account data. The feature is available by default in the system.

11.2.2.5 Configure Visit Types

Administrators can configure visit types in fine-tuning activities.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* 〉. Select your project and navigate to ▶ *Open Activity List* 〉 *Fine-Tune* 〉 *Maintain Visit Types* 〉 to create or edit your visit types.

11.2.3 Add Surveys or Tasks to Visits

You may have mandatory or voluntary activity plans such as surveys and tasks predefined and assigned by your administrators to help you execute your visits efficiently.

Your administrators can enable automatic assignment for activity plans during the design process and define routing rules in the *Activity Planner* work center.

Surveys and tasks that can be automatically assigned are routed based on certain rules to your visits under the following circumstances.

- Upon a background job that runs every 10 minutes
- A few days before the visit, depending on if your administrators have defined a time window for automatic assignment

You can manually trigger routing by refreshing to obtain most current surveys or tasks right away. Or, your administrators can use workflow rules to define when the routing rules can be triggered automatically.

For activity plans that cannot be automatically assigned, you can manually add applicable surveys under the *Surveys* tab and tasks under the *Tasks* tab in a visit.

Related Information

Activity Planning and Routing [page 704]

11.2.3.1 Update To-Do Surveys or Tasks by Refreshing Visits

You can obtain most current surveys and tasks assigned to your visits by refreshing the visits.

> **i Note**
>
> As prerequisites, your administrators must define activity plans and routing rules in the *Activity Planner* work center. For each survey or task to be routed, the *Assign Automatically* option must be checked during the design process.

Activity plan routing rules can automatically take place upon different triggers, depending on how your administrators have configured them. As users, you can manually trigger the routing in one of the following ways.

- From the list of visits, select one or more visits that you want to update, and choose ▶ *Actions* ▶ *Refresh Selected Visits* ▶.
- Go to the detail view of a visit, and choose ▶ *Actions* ▶ *Refresh Visit* ▶.

11.2.3.2 Add Surveys and Tasks to Visits Created Offline

After you create a visit offline, you can add relevant surveys and tasks by simply clicking the *Add* button under the corresponding *Surveys* and *Tasks* tabs.

As a prerequisite, your administrators must download routing rules for desired users. Together with routing rules, associated activity plans will be automatically downloaded as well.

> ! Restriction
>
> Please note following limitations regarding offline worklist determination.
>
> - Offline worklist determination is only valid for visits created offline. For visits created online, the worklist items are automatically determined online and synchronized to offline. In offline mode, any changes to visits synchronized from online do not trigger re-determination.
> - One-off tasks are not supported and are not available for selection.
> - Only checklist and product surveys are supported. All other survey types are not available for selection.
> - For product surveys that contain read-only extension fields, product and product list values are not displayed in those fields.
> - Previous answers for surveys are not supported.
> - Attachments linked to tasks in activity plans will not be replicated to tasks determined offline.

11.2.3.3 Configure Automatic Refresh for Visits

Administrators can use workflow rules to define when visits can be automatically refreshed to obtain an updated list of to-do surveys and tasks.

Context

By using workflow rules, applicable activity plans can be assigned with an automatic refresh on creating or saving a visit, or on a customized schedule.

Procedure

1. Go to ▶ *Administrator* ❯ *Workflow Rules* ◀, and create a new workflow rule.
2. Give a meaningful name in the *Description* field.
3. For *Business Object*, choose *Visit*.
4. For the *Timing* type, you can choose from *On Create Only*, *On Every Save*, and *Scheduled*. If the timing field is left blank, *On Every Save* is applied by default.

   This selection decides when your rule, in this case *Refresh Visit*, is triggered.

5. (Optional) Define conditions that you can also configure in the *Routing Rules* section in the *Activity Planner* work center.

6. For *Rule Type*, choose *Action* and select *Refresh Visit*.

7. Review and activate your workflow rule.

11.2.3.4 Configure Time Window for Visits

When visits are created, all automatically assigned surveys or tasks are added immediately. Alternatively, you can choose to limit the amount of automatic assignments by limiting how far in the future the system should add surveys or tasks to visits. For example, if you define a window of 5 days, the system adds surveys and tasks to only those visits that fall within the next 5 days.

Log on as the administrator and go to ▶ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ▐ and add *Define Time Window to Add Surveys/Tasks to Visits* to your project.

Open this business object and enter the number of days that you want the system to look ahead when it adds automatically assigned tasks and surveys to visits.

> ! Restriction
>
> This feature does NOT apply to perfect store visits.

11.3 Complete Visits

You can use tools like surveys, tasks, and image recognition to capture the results of your visits.

Check In to Visits [page 657]
    Checking in captures the date, time, and location (GPS) of the visit and opens the visit for editing, which allows you to record information about this visit in the system.

Complete Tasks and Surveys [page 659]
    Record details of your customer site visit by working through the tasks and surveys in the visit.

View Interaction Timeline During Visits [page 660]
    In a visit, you can view a chronological list of past and upcoming interactions with the account you are visiting, and navigate to the objects as needed. With this timeline view, you can gain greater business context that helps you better execute your current visits.

Check Planogram Compliance [page 660]
    If your company has purchased and set up the SAP Cloud for Customer Imaging Intelligence add-on, you can use image recognition to check planogram compliance.

Check Promotions [page 661]
    When you're at the customer site, it's a good time to check whether they are ready for any upcoming promotions.

11.3.1 Check In to Visits

Checking in captures the date, time, and location (GPS) of the visit and opens the visit for editing, which allows you to record information about this visit in the system.

> **i Note**
>
> If you don't see the *Check In* button, choose ▶ *Actions* ❯ *Set as In Process* ▶.

11.3.1.1 Configure Check-In and Check-Out for Visits

If you want to use check-in and check-out, log on as an administrator and activate it in scoping.

> **→ Tip**
>
> **Decision Point**
>
> - Why use check-in and check-out?
>   - Check-in and check-out times and dates are recorded, and you can use a report to generate statistics for visits.
>   - In the scoping questions, you can specify that the sales or service representative must complete mandatory items before checking out.
>   - After the sales or service rep checks out, the visit is completed and cannot be changed. It is effectively checked off the rep's list.
> - Why skip check-in and check-out?
>   - The visit can be changed and updated after the sales or service rep leaves the customer site.
>   - The rep is not forced to complete mandatory items before leaving the customer site.

Log on as an administrator and go to ▶ *Business Configuration* ❯ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ▶ and answer the questions for visits.

> **→ Tip**
>
> **Test It!**
>
> 1. Log on as a user and create a new visit.
> 2. Access the visit, and check-in and check-out using the buttons.

> If the buttons appear, your test is successful.

11.3.1.2 Configure Multiple Visit Check-In Prevention

As an administrator, you can set up your SAP solution to prevent users from checking into more than one visit at a time.

This option only allows visit owners to check in to a visit if they are not checked into any other visits at that time. If visit owners try to check into a visit when they are still checked in to another one, an error appears. The error lists the visit ID of the visit that they should check out of first.

> ⚠ Caution
>
> Use the data workbench to ensure that you start with a clean slate (with all visits checked out).
>
> 1. Temporarily deactivate any validation steps in scoping.
>   The data workbench honors any scoping validations, such as the mandatory completion of tasks or surveys before check-out. If you leave these validations in scope, the system prevents check-out for any visits that do not meet the validation criteria. Deactivating the validation steps in scoping effectively allows you to check out of all visits.
> 2. In the data workbench, on the *Export* tab, choose object *Visits | activity*.
> 3. To find all visits in your SAP solution that are not checked out of, set up these filters:
>
> Select All Visits That Are Still Checked In
>
> | Field | Condition | Value |
> |---|---|---|
> | *Check-In Date/Time* | Greater Than | <date that you implemented the SAP solution> |
> | *Check-Out Date/Time* | Is Initial | None |
>
> 4. Export the resulting list of visits and set them to status *Completed*.
> 5. Import the same list of visits that now have status *Completed*.
> 6. Reactivate any validation steps in scoping.
>
> For more information about the data workbench, go to the SAP Help Portal at http://help.sap.com, search for "SAP Cloud for Customer", and under *Integration*, choose *Data Workbench* user guide.

Log on as an administrator and go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ❱. Select your project and navigate to ▌▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ❱.

In the *Visits* section, for the question about preventing users from checking into multiple visits, select the checkbox to indicate that you want to use this feature.

11.3.1.3 Configure Proximity Validation During Visit Check-In

Administrators can set up the solution to validate users' proximity to accounts' geolocation during visit check-in, ensure that users execute visits onsite, and improve transparency and alignment with business processes.

Procedure

1. Go to ▶ *Business Configuration* 〉 *Implementation Projects* 〉. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Sales* 〉 *Account and Activity Management* 〉 *Activity Management* 〉 to find the corresponding question and enable proximity validation for visits.

2. Go to ▶ *Business Configuration* 〉 *Implementation Projects* 〉. Select your project and navigate to ▶ *Open Activity List* 〉 *Fine-Tune* 〉 *Maintain Visit Check In Range* 〉 to configure check-in range by country/region.

   > **i** Note
   >
   > The check-in range must be configured for the system to run proximity validation.

11.3.1.4 Configure Disablement of Visit Execution Before Check-In

As an administrator, if you set up this business option, users cannot edit specific visit information until they check in to the visit. This feature allows you to ensure that execution actions are completed during the visit.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* 〉. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Sales* 〉 *Account and Activity Management* 〉 *Activity Management* 〉.

In the *Visits* section, find the relevant question and select the checkbox to indicate that you want to use this feature.

11.3.2 Complete Tasks and Surveys

Record details of your customer site visit by working through the tasks and surveys in the visit.

Context

The tasks and surveys that are in a visit remind you to do certain actions such as checking product placement or discussing an upcoming promotion with the store manager. Record the details by adding information in the surveys and tasks.

Procedure

1. Open any tasks or surveys.

2. Work through the items in the task or surveys, gathering and recording information as you go.

> ⚙ Example
>
> You could attach a picture of the product display.

3. Complete the task or survey.

   ○ Complete tasks by choosing ▶ *Actions* 〉 *Set as Completed* 〉
   ○ Complete surveys by submitting them.

Related Information

Save, Finish, and Submit Surveys [page 808]
Add Attachments to Surveys [page 811]

11.3.3 View Interaction Timeline During Visits

In a visit, you can view a chronological list of past and upcoming interactions with the account you are visiting, and navigate to the objects as needed. With this timeline view, you can gain greater business context that helps you better execute your current visits.

You can filter objects in the timeline by date range or by document type. You can also view relevant notes and attachments when available.

This feature is only available in the Fiori client and optimized for side pane. If the *Timeline* tab is not visible, use *Personalization* or ask your administrator to *Adapt* the master layout.

11.3.4 Check Planogram Compliance

If your company has purchased and set up the SAP Cloud for Customer Imaging Intelligence add-on, you can use image recognition to check planogram compliance.

Related Information

Use Imaging Intelligence [page 701]

11.3.5 Check Promotions

When you're at the customer site, it's a good time to check whether they are ready for any upcoming promotions.

If you see that a promotion for a certain product is coming up, you can increase the customer stock for that product. Just create sales orders from the *Sales Orders* tab.

11.3.5.1 Promotions in Visits

View the promotions that are tied to a *Visit*.

Within the *Visit* tab, view current and valid promotions for the selected *Account*. You can also view the number of running and incoming promotions here.

11.3.5.2 Promotions Calendar

View *Promotions* in an easy to read calendar graphic.

The calendar view is available within the *Promotions* view under a specific *Account*, *Product*, and *Visit*. You can choose the *Month View*, *Quarter View*, or a *Selected Range* that you define. Horizontal colored bars in a chart view make it easy to view **Planned Dates**, **Buying Dates**, and **Actual Dates** for your promotions.

Promotion Dates

- **Buying Start** and **Buying End Dates** - During this time, the promotion is valid for customers.
- **Actual Date** - The actual date is when the orders made during the buying dates are executed.
- **Planned Date** - The planned dates span from the initial creation to the completion of the promotion.

> **i Note**
>
> Promotion calendar is currently available only in the SAP Fiori Client.

11.3.6 Record Contacts at Visits

Record who you spoke to or interacted with during the visit.

Make a note of the contact person you worked with during this visit under *Contacts*. You can:

- Select contacts that are listed in the account
- Create a new contact directly from here

You can also add:

- All participants in the visit under *Attendees*
- Participants with custom-defined party roles under *Other Parties*

11.3.7 Check Out of Visits

Checking out automatically sets the status of the visit to *Completed*. If your administrator has deactivated the button for checking out in scoping, you can complete a visit directly by choosing ▐▶ *Actions* ❯ *Set as Complete* ▐.

> → Tip
>
> To edit the visit after you have checked out, set the status back to *In Process* and then make your changes.

11.3.7.1 Configure Check-Out Prompt for Visits

Administrators can set up the solution to notify users when they leave the customer location without checking out of the visit. Checking out promptly can reduce data inconsistencies and ensure proper tracking of visit execution time.

Context

This feature is supported on both Android and Windows.

Procedure

1. Go to ▐▶ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▐▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ▐ to find the corresponding question and enable check-out prompt for visits.

2. Go to ▐▶ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▐▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Maintain Visit Check-Out Range* ▐ to configure check-out range by country/region.

11.3.7.2 Configure "Create New Visit?" Prompt at Check-Out

Administrators can disable the "Create New Visit?" prompt when users check out from a visit. The configuration applies to both online and offline modes.

To disable this prompt, go to ▐▶ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▐▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ▐.

Under *Visits*, answer the question about disabling the check-out prompt.

11.3.7.3 Configure Mandatory Completion of Tasks and Surveys at Check-Out

This business option lets you enforce the mandatory settings for surveys and tasks. If you use this option, your sales or service representatives must complete all the mandatory items within a visit before they can close the visit.

Log on as an administrator and go to ▐▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▐▶ *Edit Project Scope* ❭ *Questions* ❭ *Sales* ❭ *Account and Activity Management* ❭ *Activity Management* ❭ and in the *Visits* section, answer the question related to this option.

11.4 After Visits

After a visit, you can create any necessary follow-up items. You can also generate a visit summary and share the visit results with attendees.

> → Tip
>
> To edit the visit after checkout, go to the detail view of the visit, choose ▐▶ *Actions* ❭ *Set as In Process* ❭, and then make your changes.

Create Follow-Up Items for Visits [page 664]
    You can schedule follow-up appointments or phone calls right from the visit if you touch on an item that you must get back to your customer about. You can also create a follow-up item if you discover that the customer needs additional products, an upgrade, or spare parts or repairs.

Generate Visit Summaries [page 665]
    After you check out from a visit, you can review the visit by generating a summary.

Share Visit Summaries [page 665]
    Once you have generated a visit summary, you can share it with the rest of the attendees.

11.4.1 Create Follow-Up Items for Visits

You can schedule follow-up appointments or phone calls right from the visit if you touch on an item that you must get back to your customer about. You can also create a follow-up item if you discover that the customer needs additional products, an upgrade, or spare parts or repairs.

The following table outlines the types of requests, lists examples, and indicates how to order them in the system.

Sample Follow-Up Items

Example	Request Type	Choose
Out-of-stock products	Product order	*Sales Order*
Machine should be upgraded to the latest model	Opportunities	▌ *Follow-Up Items* ❯ *New* ❯ *Opportunity* ❯
Appliance for storage (refrigerator) or demonstration (mini-grill) does not work	Spare parts or repairs	▌ *Follow-Up Items* ❯ *New* ❯ *Service Ticket* ❯

11.4.2 Generate Visit Summaries

After you check out from a visit, you can review the visit by generating a summary.

Procedure

1. Go to the detail view of a visit.
2. From the *Actions* menu at the bottom right, select *Generate Summary*.
3. Go to the *Attachments* tab, and you can find the PDF summary generated.

   You can have only one summary per visit. When you generate a new summary, the previous one will be overridden.

11.4.3 Share Visit Summaries

Once you have generated a visit summary, you can share it with the rest of the attendees.

Prerequisites

Email address should be predefined for each attendee for summaries to be sent via email.

Procedure

1. Go to the *Attendees* tab of the visit.
2. Select an attendee and click ▌ *More* ❯ *Send Summary* ❯.

> **i Note**
>
> The *Select* column must be checked before the *Send Summary* option becomes available.

11.5   Visits Offline

In your solution, the following items can be used offline.

Quick Create - Field Level Availability

Section	Field	Available Offline	Default/Determination Offline
Header General	Subject		
	Name	Y	N
	Status		
	Account	Y	N
	Owner	Y	Y
	Organizer	Y	Y
	Start Date/Time	Y	Y
	End Date/Time	Y	Y
	All day event	Y	N
	Sales Organization	Y	N
	Distribution Channel	Y	N
	Division	Y	N
	Sales Territory	Y	N
	Extension Fields	Y	N
	Geo-fields		
	Check-In Time		
	Check-Out Time		
	Route		
	Notes		

Detailed View - Field Level Availability

Tab	Section	Field	Display	Edit (directly OR via actions OR via navigation)
Overview	Header	Subject	Y	Y
		Name		
		Status	Y	Y
		Account	Y	Y
		Owner	Y	Y
		Organizer	Y	Y
		Start Date/Time	Y	Y
		End Date/Time	Y	Y
		All day event	Y	Y
		Sales Organization	Y	Y
		Distribution Channel	Y	Y
		Division	Y	Y
		Sales Territory	Y	Y
		Extension Fields	Y	Y
		Geo-fields	Y	Y
		Check-In Time	Y	Y
		Check-Out Time	Y	Y
		Route	Y	N
		Notes	Y	Y
	Last Visited	Last Visit Date/Time	Y	NA
		Last Visit Notes	Y	NA
	Contacts	Name/Address/E-mail	Y	NA
	Campaigns	Ongoing / Upcoming	Y	NA
	Notes	Notes	Y	Y

Tab	Section	Field	Display	Edit (directly OR via actions OR via navigation)
	Completed Tasks		N	
	Completed Surveys		N	
Tasks	Tasks	Subject	Y	Y
		Category	Y	Y
		Status	Y	Y
		Priority	Y	Y
		Mandatory	Y	Y
		Created On	Y	NA
		Additional hidden fields	Y	Y
		Notes	Y	Y
Surveys	Surveys	Name	Y	NA
		Status	Y	Y
		Category	Y	NA
		Total Score	N	N
		Total Maximum Score	N	N
		Mandatory	N	NA
Contacts	Contacts	Name	Y	Y
		Function	Y	Y
		Department	Y	Y
		Address	Y	Y
		E-mail	Y	Y
		Primary Contact	Y	Y
Attendees	Attendees	Name	Y	Y
		Phone	Y	Y

Tab	Section	Field	Display	Edit (directly OR via actions OR via navigation)
		E-mail	Y	Y
		Address	Y	Y
		Actions	Y	Y
Orders	Orders		Y	Y
Promotions	Promotions		Y	NA
Campaigns	Campaigns		N	NA
Follow-Up Items	Follow-Up Items		Y	Y
	Related Items		N	N
Attachments	Attachments		Y	Y
Changes	Changes		NA	NA
Document Flow	Document Flow		NA	NA

Offline Actions

Object	Global / Tab	Actions	Offline Availability
Visit	Global	Check-In	Y
		Check-Out	Y
		Set as In Process	Y
		Set as Canceled	Y
		Refresh Visit	N
		Generate Summary	N
	Tasks	Add	N
		New	Y
		Set as In Process	Y
		Set as Completed	Y
	Survey	Submit	Y
		Add Picture	Y

Object	Global / Tab	Actions	Offline Availability
		Add Products	Y
	Contacts	Add	Y
		New	Y
	Attendee	Add	Y
	Orders	New	Y

11.6 Visits FAQ

Having trouble using visits? Check this list of questions and answers for help.

11.6.1 Why don't I see tasks and surveys when I create a visit?

Tasks and surveys may be generated a few minutes after you create your visit or a few days before the visit.

If you want to see tasks and surveys immediately when you create a visit, refresh the visit with ▶ *Actions* 〉 *Refresh Visit* 〉.

Otherwise, tasks and surveys do not appear immediately when you create visits. This is due to one of the following reasons:

- There is a background job that runs every 10 minutes that generates tasks and surveys for new visits. Wait a few minutes and check again.
- Your administrator may have set up your system to generate tasks and surveys a certain number of days before the visit. To see if this is the case, check with your administrator.

11.6.2 How do I define how often I want to visit my customer sites?

The frequency that you or your manager set in the account is how the solution determines when this account is due (or overdue) for a visit.

To define visit frequency for an account, access the account, choose the *Visits* tab, and set the recommended frequency for visits.

> **i Note**
> If you want to define visit frequency based on visit type and sales area, go to the *Visit Details* tab instead.

11.6.3 How do I make sure I'm scheduling the visit at an appropriate time?

You can see the customer's schedule, including any other appointments that may be scheduled by other colleagues, by looking at the calendar for the account. Compare that with your own calendar. You can also define visiting hours for the account.

The calendar view of an account shows all upcoming appointments for that account in one calendar, even if they were scheduled by other colleagues.

To check your schedule for upcoming visits and appointments, check your calendar.

In addition to appointments and visits, phone calls also appear on your calendar.

You can view other users' schedules if you are authorized to do so.

In addition, if you have defined visiting hours for the account, when you save the visit (or activate the route), the solution checks to make sure the visit time you have scheduled falls within that account's defined visiting hours.

11.6.4 Which campaigns show up in the visit?

The solution checks a few things to ensure that you see only the relevant campaigns in your visits.

The campaigns that appear in the visit include campaigns that meet the following criteria:

- Are valid for the associated account
- Have been executed
- Are valid on the date of the visit

For more information about specific campaigns, check the *Campaigns* tab, where you can link to the assigned campaigns directly.

11.6.5 Why can't I create a visit for my account?

Check the account status. If it's set to blocked or obsolete, then you can no longer create transactions from that account, including opportunities, leads, sales quotes, tickets, visits, and activities.

11.6.6 Can we use approvals with visits?

At the moment, it is not possible to use the approval work flow with visits.

11.6.7 How can I link a visit to an existing opportunity?

You can either create a visit from the opportunity, which will create the link, or you can add an existing visit to an existing opportunity.

Context

To link an existing visit to an existing opportunity, proceed as follows:

Procedure

1. In the visit, choose ▶ *Follow-Up Items* ❯ *Related Items* ❚.
2. Select the opportunity you'd like to add, and add it to the visit.

11.6.8 Why can't I enter a value of zero in a survey?

If the survey question is defined as type *Amount* and marked as mandatory, you must enter a number that falls within the defined number range.

If zero should be a valid response, contact the person who designed the survey. They may need to adjust the type or the upper and lower limits that are defined for this question.

Related Information

Survey Questions [page 780]

11.6.9 How are accounts overdue for visits calculated?

The filter *My Accounts Overdue for Visits* uses account settings and visit history to suggest accounts to visit.

In routes and in the visit planner, you can filter accounts to only show those that are overdue for visits. Accounts that meet the following criteria appear in the results list for the *My Accounts Overdue for Visits* filter:

- Accounts that have never been visited (accounts with no last visit or next visit)
- Accounts whose visit-before date is in the past
- Accounts with no visit-before date defined and whose next-visit date is in the past

12   Routes

By using routes, you can plan a group of visits and arrange them in a logical sequence for your sales representatives.

Route
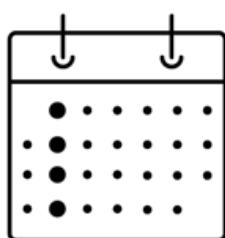
January
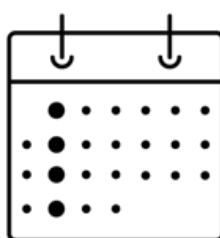
February
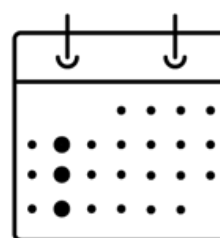
March

A route can involve one or multiple accounts. You can create one-day routes or routes that span across a period of time. You can also set up your system to use the visiting information defined per account to propose recurring visits within a specified date range.

You can preview your schedule on calendar to avoid time conflicts. Use map view to visualize the route and resequence accounts if needed. When you are satisfied with the visit sequence and timing in the route, you can generate all the visits in the route at once.

If you plan to use the same route more than once, consider creating a route template first. In reusing scenarios, creating route templates not only saves your time, but also ensures accuracy and consistency.

For commonly repeated routes, you can define repetition frequency and validity period in the template. Based on those recurrence settings, you can set up the system to schedule and automatically generate routes and subsequence visits as they approach.

> ⁘ Example
>
> As a sales manager, your team has a group of customers on the west side of town that you want someone on your team to visit once per month. You use a route template to define the sequence and timing of these

visits. You also define that this route happens on Tuesdays because your team meeting is on Wednesdays and two of the customers cannot accommodate site visits on Fridays or Mondays.

These are Denise's accounts. Most months, you as the route organizer generate the visits in this route for her, or she generates the route herself as the route owner. When she is on vacation, you can easily change ownership of the visits in this route to another team member.

12.1 Scope and Configure Routes

Administrators can configure routes using scoping, scoping questions, and fine-tuning activities.

Scoping questions and fine-tuning activities that are self-explanatory may not be included in this list.

> → Recommendation
>
> When you log on as an administrator, you can find the scoping questions under ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ❯.
>
> We recommend that you review all the scoping questions in the areas that are relevant and that you have included in your scope. When you select a question, more information appears in the details section of the screen.

12.1.1 Enable Routes

Before users can plan visits using routes, administrators must add routes to the scope of the project.

Procedure

1. Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Scoping* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ❯ and check the box next to the scoping item for using routes.
2. Assign the *Visits* work center view (ID: *COD_VISIT_WCF*) to appropriate business users or roles.

   For more details, see Create Business Roles and Assign Work Centers and Views.

Results

All colleagues to whom you have assigned the visits work center can create and work with visits, use routes to plan days or weeks of visits at a time, and use route templates to save time and increase consistency.

12.1.2 Configure Window for Route Scheduling

Administrators can set up the system to schedule route creation and the subsequent visit generation based on the recurrence settings defined in the route template.

Context

Administrators must scope the feature before you can configure it.

Procedure

1. Go to ▶️ *Business Configuration* ❯ *Implementation Projects* ▶️. Select your project and navigate to ▶️ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ▶️ to find and enable the question about scheduling periodic creation of routes.

2. Go to ▶️ *Business Configuration* ❯ *Implementation Projects* ▶️. Select your project and navigate to ▶️ *Open Activity List* ❯ *Fine-Tune* ❯ *Define Window for Route Scheduling* ▶️ and enter the number of days ahead that you want commonly repeat visit plans to be generated.

12.1.3 Configure Web Services (A2X) to Read, Edit, or Delete Routes

Administrators can enable the use of web services to read, edit, or delete routes for which visits have not been generated.

For more information about web services, see the Web Services Quick Guide in the SAP Cloud Applications Studio documentation.

12.2 Plan Visits Using Routes

Routes is the single point of entry for visit planning for sales representatives.

Context

Create Routes [page 676]

You can create a route to organize your visits into a logical sequence.

What you define in route details are valid for all visits proposed in the route.

You can create day-by-day visit plans that involve multiple accounts as well as individual customers.

You can provide authorization for others to use this route and add attachments that are useful for each visit in this route.

You can check the travel path, spot and eliminate scheduling conflicts, and optimize the sequence of visits for each day of the planned route.

Activate the route, and generate all the visits that you have planned in this route with the click of a button.

12.2.1 Create Routes

You can create a route to organize your visits into a logical sequence.

Context

> i Note
>
> If you want to reuse this group of visits, consider creating a route template first. A route template streamlines the creation process for the next time that you want to use this route.

Procedure

1. Create a route.

   ○ If you want to create this route from an activated route template:
      1. Go to *Routes* and open the activated route template.
      2. Click ▶ *Actions* ❯ *Create Route from Template* ❯.
   ○ If you only plan to use this route once:
      1. Go to *Routes* and click *New*.
      2. Set the type to *Route*.

2. Give it a name and enter route details.

3. Define the days of the week on which you do not plan to conduct visits.

For example, if you must be in the office on Wednesdays, you can stipulate that the system should not create customer site visits on Wednesdays.

> → Remember
>
> You can only define the days of the week to exclude for a route during creation.

4. Save your entries.

Next Steps

Propose visits to the route by adding accounts.

Related Information

12.2.1.1 Change the Route Owner

After the route is created, you can replace the route owner by opening the route and clicking ▶ *Actions* ❯ *Change Owner* ❯.

This action also allows you to change the owner of all subsequent visits that have been previously generated from the route.

12.2.1.2 Save Daily Visit Plan as Route or Route Template

In calendar, you can save your visit plan for the day as a route or route template for future use by choosing *Save as Route* or *Save as Template*.

If you think that you may want to repeat this sequence of visits once again, save it as a route. If you want to reuse this sequence of visits on a recurring basis, save your visit plan for the day as a route template instead.

12.2.1.3 Configure Web Services (A2X) to Read, Edit, or Delete Routes

Administrators can enable the use of web services to read, edit, or delete routes for which visits have not been generated.

For more information about web services, see the Web Services Quick Guide in the SAP Cloud Applications Studio documentation.

12.2.2 Define Route Details

What you define in route details are valid for all visits proposed in the route.

In the route, go to *More Details* where you can make these settings:

Route Details

Option	Description
Start Time	You can maintain a default start time when the daily route should begin.
Visit Prep Time (Average)	You can maintain a default preparation time for all visits proposed in the route.
Visit Duration (Average)	You can maintain a default duration for all visits proposed in the route. i Note For each account or individual customer, you can maintain visit duration at its header or sales area level. In such cases, the proposed visit may use the customer-specific value instead of the default visit duration that you maintain here. For more details, please see Maintain Visit Information [page 651].
Time Zone	If your team is working in a different time zone, you can specify the time zone where the system generates the visits.
Language	If your team is in a region where more than one language is spoken, you can define the language that the system uses to generate the visits.

Option	Description
Automatic Rescheduling	With this flag on, when you add or move visits within the route, subsequent visits are rescheduled automatically.
Always Show Route Owner's Schedule	To avoid scheduling conflicts, as you plan visits within the route, the system can populate visits and appointments that have been scheduled for the route owner on that day. With this flag on, as soon as you add a visit with a specified date to the route, the owner's schedule for that day automatically displays. ! Restriction This feature is not applicable when the owner is derived from territory.
Derive Owner From Territory	With this flag on, you must specify a sales territory instead of a route owner. Every time the system generates a visit from this route, the owner of the sales territory becomes the visit owner. It ensures that visits are dynamically assigned despite any personnel changes.
Visit Type	You can maintain a default visit type for all visits proposed in the route. i Note Proposed visits may use visit frequency and duration tied to the visit type, provided such visit information has been predefined in the account or individual customer. For more details, please see Maintain Visit Information [page 651].
Sales Organization Distribution Channel	You can plan visits by sales area. When you add accounts using the *Visits Due for Owner* filter, the system only suggests accounts and individual customers that are due for the specified sales area. i Note Proposed visits may use visit frequency and duration tied to the sales area, provided such visit information has been predefined

Option	Description
Division	in the account or individual customer. For more details, please see Maintain Visit Information [page 651].
Perfect Store Visit	With this flag on, all visits proposed in the route are considered perfect store visits by default. You can switch on and off the perfect store indicator for each individual proposed visit in the route.
Notes	Notes that you add here appear for every visit generated from this route.

12.2.3 Add Accounts to Routes

You can create day-by-day visit plans that involve multiple accounts as well as individual customers.

Prerequisites

Go to *More Details* and define default settings for all visits that you are going to propose in the route.

Procedure

1. In the route, go to *Overview* and click *Add*.
2. Search for accounts by using queries and advanced search.

> ☘ Example
>
> ○ The *Visits Due for Owner* query suggests accounts where the *Visit Before* date maintained at the account level is equal to or later than the route start date. Overdue visits are not considered. You can use the *Visit Between* search field to further look for accounts due in a specified date range.
> ○ The *Role* search field allows you to filter accounts based on whether they are prospects or existing customers, and plan visits accordingly.
> ○ The *Future Visit Planned* search field allows you to filter accounts based on whether a *Next Planned Visit* date is maintained at the account level.
> ○ Sales area and visit type that you have maintained under *More Details* are prepopulated in advanced search for the default query.

3. Add the accounts to the route.

4. To continue planning visits for the next day, click *Add on Next Day*.

    Days that are excluded for visiting are automatically skipped in this route planning.

5. When you are happy with the visits and their sequence, save your entries.

Next Steps

Verify your route and make sure that there are no time conflicts and the route is optimal.

12.2.3.1 Add Recurring Visits to Routes

When proposing an account within a specified date range, the system can also suggest the number of visit recurrences based on *Recommended Visit Frequency* maintained in the account.

Context

Procedure

1. When you add accounts to the route, open advanced search.
2. In the *Visit Between* field, enter a specific date range.
3. Check the *Add Recurrence* field.
4. Maintain other search fields as needed.
5. Click *Go* and you can see applicable accounts together with their *Recurrences in Time Period*.
6. Add desired accounts to the route.

Results

Visits including their recommended recurrences within the specified date range are displayed in the table.

Related Information

Maintain Visit Information [page 651]

12.2.3.2 Search Accounts in Map View

You can use map view when you search for an account to add to a route.This feature is especially useful when, for example, an account has multiple sites in one city. You can visually locate them on map and easily select the one you want.

Related Information

12.2.3.3 Visualize Daily Route Plan in Map View

You can view your path for each day of your route on map and adjust the sequence of visits to optimize your trip.

In the route or route template, go to *Overview* and click ▶ *More* ❯ *Show Map* ◀ . A map appears, showing the visit schedule with both proposed and existing visits and travel path for the first or selected day. To see the route of a different day, select the corresponding date or day at the top of the list.

You can use the arrows next to each visit to move it up or down in the trip sequence. The visit schedule updates in real time with preparation time and travel time being considered. When you close the map view, the route saves the new sequence that you plan for the day.

Related Information

12.2.4 Add Involved Parties and Attachments to Routes

You can provide authorization for others to use this route and add attachments that are useful for each visit in this route.

Involved Parties and Attachments

Tab	You Can...	Notes
Involved Parties	Define the owner, organizer, and assign this route to attendees	Attendees listed on this tab can see and edit this route, as well as use it to generate visits.
		After the visits are generated, attendees become visit attendees.
Attachments	Add any documents that might be useful for these visits	Attachments that you add here appear as attachments for every visit that you generate from this route.

12.2.5 Verify Routes

You can check the travel path, spot and eliminate scheduling conflicts, and optimize the sequence of visits for each day of the planned route.

12.2.5.1 Visualize Daily Route Plan in Map View

You can view your path for each day of your route on map and adjust the sequence of visits to optimize your trip.

In the route or route template, go to *Overview* and click ▶ *More* ❯ *Show Map* ❯ . A map appears, showing the visit schedule with both proposed and existing visits and travel path for the first or selected day. To see the route of a different day, select the corresponding date or day at the top of the list.

You can use the arrows next to each visit to move it up or down in the trip sequence. The visit schedule updates in real time with preparation time and travel time being considered. When you close the map view, the route saves the new sequence that you plan for the day.

Related Information

Map [page 69]

12.2.5.2 View Visit Schedule on Calendar

You can see the calendar of the employee for whom you are planning the visits in this route to ensure availability.

In the route, go to the *Overview* tab and click ▶ *More* ▶ *Show Calendar View* ▶. The calendar in SAP Cloud for Customer appears with proposed visits as well as existing visits and appointments highlighted in different colors for clarity.

12.2.5.3 Optimize Routes

Route optimization based on maiTour allows you to plan routes based on strategic sales targets, business goals, front- and back-office rules, and marketing guidelines.

> i Note
>
> To use this feature, please contact SAP for pricing and setup information.

Advantages of using route optimization include:

- Simple, easy-to-use screens
- Planning around fixed appointments
- Ad-hoc planning
- Planning overnight stays
- Seamless integration with the SAP Cloud Platform
- Premium geo-optimization services of Planung Transport Verkehr AG (PTV), member of Porsche SE Group
- Planning with real-time and historic traffic information (country/region restrictions may apply)

12.2.5.4 Check Routes

You can use ▌▶ *Actions* ❯ *Check Route* ▌ to prevent time conflicts on your calendar.

Checking the route compares proposed visits in this route with:

- Existing visits and appointments that appear on the route owner's calendar in SAP Cloud for Customer
- Visiting hours and days for customers, as defined in the account
- Days excluded for visiting, as defined in the route

Conflicts generate messages that appear in the row for the affected visits like this:

- An error symbol appears in the *Message* column that you must add with personalization
- The field with the conflict is highlighted and the message appears when you hover over the highlighted field

12.2.6 Activate Routes and Generate Visits

Activate the route, and generate all the visits that you have planned in this route with the click of a button.

Context

> **i** Note
>
> Before visits are generated, if you want to edit an activated route, you can simply set the status back to *In Preparation* and make changes. If visits are already generated, you can no longer change the route status.

Procedure

1. Activate the route by choosing ▌▶ *Actions* ❯ *Activate* ▌.
2. Generate the visits in this route by choosing ▌▶ *Actions* ❯ *Generate Visits* ▌.

Results

There is a background job that runs every 8 minutes to generate visits. When the background job is complete, the processing status of the route is set to complete. In the column of *Activity*, you can see a link to each visit generated.

The organizer and owner that are defined at route level appear as the organizer and owner of the visits generated from the route. The person that you designate as the owner can also see the route and the visits.

12.3 Create Routes from Templates

If you or others plan to use a route more than once, you can save time by creating a route template first. You can then use the template to create routes as soon as you know the start dates.

You can create a route template to conveniently regenerate visit plans for reusing scenarios.

What you define in route template details are valid for all routes that are generated from this template.

You can create reusable visit plans that involve multiple accounts as well as individual customers.

You can provide authorization for others to use this template and add attachments that are useful for each visit in this template.

Activate the route template, and create routes from this template with the click of a button.

For commonly repeated visit plans, the system can automatically generate routes and subsequent visits at regular intervals. This feature is only applicable to routes that have a recurring nature.

12.3.1 Create Route Templates

You can create a route template to conveniently regenerate visit plans for reusing scenarios.

Procedure

1. Go to *Routes* and click *New*.
2. Set the type to *Template*.
3. Give it a name and enter details for this route template.
4. Save your entries.

Next Steps

Propose visits to the route template by adding accounts.

Related Information

Define Details for Route Templates [page 689]

12.3.1.1 Save Daily Visit Plan as Route or Route Template

In calendar, you can save your visit plan for the day as a route or route template for future use by choosing *Save as Route* or *Save as Template*.

If you think that you may want to repeat this sequence of visits once again, save it as a route. If you want to reuse this sequence of visits on a recurring basis, save your visit plan for the day as a route template instead.

12.3.2 Define Details for Route Templates

What you define in route template details are valid for all routes that are generated from this template.

In the route template, go to *More Details* where you can make these settings:

Route Details

Option	Description
Start Time	You can maintain a default start time when the daily route should begin.
Visit Prep Time (Average)	You can maintain a default preparation time for all visits proposed in the route.
Visit Duration (Average)	You can maintain a default duration for all visits proposed in the route. **i Note** For each account or individual customer, you can maintain visit duration at its header or sales area level. In such cases, the proposed visit may use the customer-specific value instead of the default visit duration that you maintain here. For more details, please see Maintain Visit Information [page 651].

Option	Description
Time Zone	If your team is working in a different time zone, you can specify the time zone where the system generates the visits.
Language	If your team is in a region where more than one language is spoken, you can define the language that the system uses to generate the visits.
Automatic Rescheduling	With this flag on, when you add or move visits within the route, subsequent visits are rescheduled automatically.
Always Show Route Owner's Schedule	To avoid scheduling conflicts, as you plan visits within the route, the system can populate visits and appointments that have been scheduled for the route owner on that day. With this flag on, as soon as you add a visit with a specified date to the route, the owner's schedule for that day automatically displays. ! Restriction This feature is not applicable when the owner is derived from territory.
Derive Owner From Territory	With this flag on, you must specify a sales territory instead of a route owner. Every time the system generates a visit from this route, the owner of the sales territory becomes the visit owner. It ensures that visits are dynamically assigned despite any personnel changes.
Visit Type	You can maintain a default visit type for all visits proposed in the route. i Note Proposed visits may use visit frequency and duration tied to the visit type, provided such visit information has been predefined in the account or individual customer. For more details, please see Maintain Visit Information [page 651].
Sales Organization Distribution Channel	You can plan visits by sales area. When you add accounts using the *Visits Due for Owner* filter, the system only suggests accounts and individ-

Option	Description
Division	ual customers that are due for the specified sales area. i Note Proposed visits may use visit frequency and duration tied to the sales area, provided such visit information has been predefined in the account or individual customer. For more details, please see Maintain Visit Information [page 651].
Perfect Store Visit	With this flag on, all visits proposed in the route are considered perfect store visits by default. You can switch on and off the perfect store indicator for each individual proposed visit in the route.
Notes	Notes that you add here appear for every visit generated from this route.

12.3.2.1 Define Settings for Recurring Routes

For a route that is of a recurring nature, you can maintain its repetition frequency and validity period. Your administrator can further set up the system to schedule and automatically generate routes and subsequent visits based on those recurrence settings.

Related Information

Schedule Route Generation from Templates [page 696]

12.3.2.2 Define Days of the Week to Exclude from Route Planning

You can define the days of the week on which you do not plan to conduct visits. For example, if you must be in the office on Wednesdays, you can stipulate that the system should not create customer site visits on Wednesdays.

12.3.3 Add Accounts to Route Templates

You can create reusable visit plans that involve multiple accounts as well as individual customers.

Prerequisites

Go to *More Details* and define default settings for all visits that you are going to propose in the route template.

Context

> **i Note**
>
> You cannot enter actual dates in a route template. You simply enter the visits you want to make on day one, day two, and so on. Actual dates appear when you or another authorized user creates a route from this template. Days that are excluded for visiting are automatically skipped during route generation.

Procedure

1. In the route template, go to *Overview* and click *Add*.
2. Search for accounts by using queries and advanced search.

   > **⁂ Example**
   >
   > - The *Visits Due for Owner* query suggests accounts where the *Visit Before* date maintained at the account level is a day in the future. Overdue visits are not considered.
   > - The *Role* search field allows you to filter accounts based on whether they are prospects or existing customers, and plan visits accordingly.
   > - The *Future Visit Planned* search field allows you to filter accounts based on whether a *Next Planned Visit* date is maintained at the account level.
   > - Sales area and visit type that you have maintained under *More Details* are prepopulated in advanced search for the default query.

3. Add the accounts to the route template.

4. To continue planning visits for the next day, click *Add on Next Day*.

5. When you are happy with the visits and their sequence, save your entries.

12.3.3.1 Search Accounts in Map View

You can use map view when you search for an account to add to a route.This feature is especially useful when, for example, an account has multiple sites in one city. You can visually locate them on map and easily select the one you want.
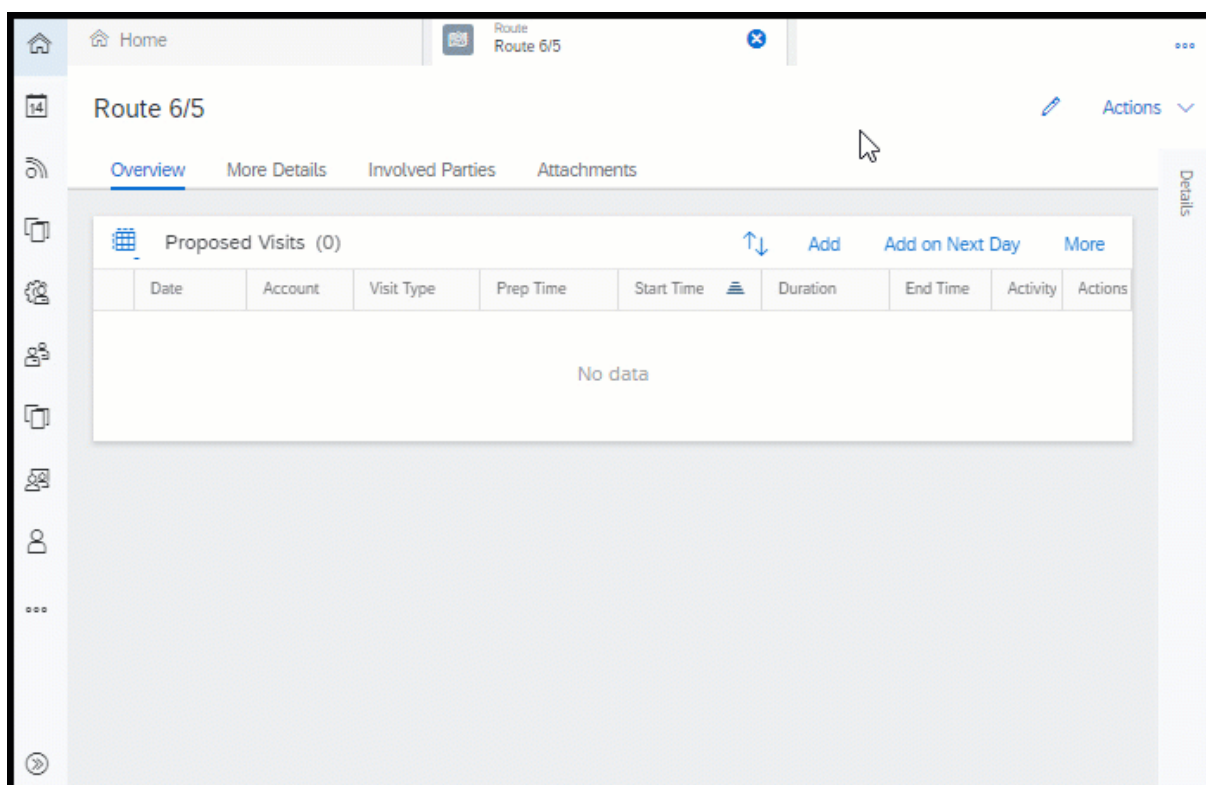
Related Information

[Map [page 69]](#)

12.3.3.2 Visualize Daily Route Plan in Map View

You can view your path for each day of your route on map and adjust the sequence of visits to optimize your trip.

In the route or route template, go to *Overview* and click ▌▶ *More* ❯ *Show Map* ▐. A map appears, showing the visit schedule with both proposed and existing visits and travel path for the first or selected day. To see the route of a different day, select the corresponding date or day at the top of the list.

You can use the arrows next to each visit to move it up or down in the trip sequence. The visit schedule updates in real time with preparation time and travel time being considered. When you close the map view, the route saves the new sequence that you plan for the day.

Related Information

Map [page 69]

12.3.4 Add Involved Parties and Attachments to Route Templates

You can provide authorization for others to use this template and add attachments that are useful for each visit in this template.

Involved Parties and Attachments

Tab	You Can...	Notes
Involved Parties	Define the owner, organizer, and assign this template to sales employees	Employees listed on this tab can see and edit this template, as well as use it to generate routes.
Attachments	Add any documents that might be useful for these visits	Attachments that you add here appear as attachments for every route and subsequent visit that you generate from this template.

12.3.5 Activate Route Templates and Generate Routes

Activate the route template, and create routes from this template with the click of a button.

Procedure

1. Activate the route template by choosing ▐▶ *Actions* ❯ *Activate* ▐.
2. Create routes from this template by choosing ▐▶ *Actions* ❯ *Create Route from Template* ▐.

Results

You can track the routes that have been generated from this route template under the *Template History* tab.

Related Information

[Activate Routes and Generate Visits [page 687]](#)

12.3.6 Schedule Route Generation from Templates

For commonly repeated visit plans, the system can automatically generate routes and subsequent visits at regular intervals. This feature is only applicable to routes that have a recurring nature.

As prerequisites, your administrator must enable the feature and configure window for route scheduling.

During route generation, any day exclusions that you have defined are taken into account.

> ❖ Example
>
> Let's say you have created a 3-day route template and want the route to repeat weekly on every Tuesday of April. In configuration, your administrator has specified that any routes and resulting visits planned in a route template with recurrence settings maintained should be generated 4 days ahead of time. If April 1 is a Tuesday, the route and resulting visits for the week of April 1 are generated 4 days prior, on March 28. Then on April 4, the system generates the route and resulting visits for the week of April 8.

Related Information

12.3.6.1 Configure Window for Route Scheduling

Administrators can set up the system to schedule route creation and the subsequent visit generation based on the recurrence settings defined in the route template.

Context

Administrators must scope the feature before you can configure it.

Procedure

1. Go to ▌▶ *Business Configuration* 〉 *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Edit Project Scope* 〉 *Questions* 〉 *Sales* 〉 *Account and Activity Management* 〉 *Activity Management* ▌ to find and enable the question about scheduling periodic creation of routes.

2. Go to ▌▶ *Business Configuration* 〉 *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Open Activity List* 〉 *Fine-Tune* 〉 *Define Window for Route Scheduling* ▌ and enter the number of days ahead that you want commonly repeat visit plans to be generated.

12.4 Routes Offline

This topic presents an overview of features supported for routes in offline mode.

Offline Scope

| | | | Create Screen | | Detailed View | |
| | | | | | | Edit (directly/ via actions/via navigation) |
Tab	Section	Field	Create	Default	Display	
Overview	Header fields	Subject			Y	Y
		Route			Y	N

Related Information

12.5 Routes FAQ

Having trouble using routes? Check this list of questions and answers for help.

12.5.1 What is the difference between routes and tours?

As of February 2015, routes replaced tours. If you have been using tours, we recommend that, in the future, you use routes for planning and generating visits.

12.5.2 Can I plan different routes for prospects and existing customers?

Yes. When adding accounts to your visit plan, you can utilize the *Role* field in advanced search to filter accounts. You can then set up separate routes for prospects and existing customers.

12.5.3 Can the SAP solution suggest the most efficient routes?

Yes. Route optimization with maiTour can suggest optimal routes based on site locations, distances, account criteria, and other relative information.

Related Information

Optimize Routes [page 686]

12.5.4 Can I upload routes from a list?

Yes. Administrators can enable web services (A2X) for you to manage routes.

For more information about web services, see the Web Services Quick Guide in the SAP Cloud Applications Studio documentation.

13   (Deprecated) Imaging Intelligence

You can upload planograms and compare them to pictures of product displays that you take at customer sites. Imaging intelligence pinpoints the differences between the planogram and the picture and provides suggestions for adjustments to ensure that the customer-site display matches the planogram.

> **i Note**
>
> As of November 2020, SAP Cloud for Customer Imaging Intelligence is discontinued and no longer supported.

13.1   Scope and Configure Imaging Intelligence

Administrators can configure SAP Cloud for Customer Imaging Intelligence using scoping, scoping questions, and fine-tuning activities.

> **→ Recommendation**
>
> We recommend that you review all the scoping questions in the areas that are relevant and that you've included in your scope. When you select a question, more information appears on the tabs on the details section of the screen.

> When you log on as an administrator, you can find the scoping questions under ▶ *Business Configuration* ▶ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *Account and Activity Management* ▶ *Activity Management* ▶.

Scoping questions and fine-tuning activities that are straightforward may not be included in this list.

13.1.1 Enable Imaging Intelligence

As an administrator, before you set up imaging intelligence, add it to the scope of your project and enable it.

> **i Note**
>
> **Prerequisite**
>
> You have purchased SAP Cloud for Customer Imaging Intelligence.

Go to ▶ *Business Configuration* ▶ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *Account and Activity Management* ▶ *Activity Management* ▶ and check the box.

In the *Questions* step, under ▶ *Sales* ▶ *Account and Activity Management* ▶ *Activity Management* ▶, in the *Visits* section, select the checkbox to enable image recognition in your SAP solution.

13.1.2 Configure Imaging Intelligence

Administrators can upload product images and planograms so that imaging intelligence can compare them to actual shelf images.

Prerequisites

You have purchased SAP Cloud for Customer Imaging Intelligence.

Context

Log on as an administrator and go to ▶ *Administrator* ▶ *Sales and Campaign Settings* ▶ *Open Planocheck Administrator* ▶.

Procedure

1. Upload product images by choosing ▶ *Ricoh* ▶ *Batch Upload*.
   1. Upload metadata as a CSV file.
   2. Upload images in ZIP files.

   The data and images become the baseline for each product that imaging intelligence uses for comparing with items on actual shelves.

2. On the *Planograms* tab, use the button to upload your planograms in .xls or .xlsx format.

   When you upload planograms, they have status *Created*, which means that Ricoh is analyzing them. When the analysis is complete, the planograms have status *OK*.

3. When the planogram reaches status *OK*, edit it to add the following information:

   1. *Attach Stores*
      Add each store in which you want to use this planogram.
   2. Activate it to replace any previous versions.
   3. Update it to save your changes.

4. On the *Manufacturers* tab, add manufacturers.

   On the screen that appears, enter the required information:
   1. Enter the manufacturer's name.
   2. Enter the manufacturer's code, which is the first 8 numbers of the UPC code for that manufacturer.
   3. Under *Customer*, make the appropriate setting:
      - *True* means that you want to display corrective actions for this manufacturer's products
      - *False* means that you do not want to display corrective actions for this manufacturer's products

13.2 Use Imaging Intelligence

Just take a picture to compare the display that was defined in the planogram with the actual display.

> ℹ **Note**
>
> **Prerequisite**
>
> You have purchased SAP Cloud for Customer Imaging Intelligence.

13.2.1 Configure Imaging Intelligence

Administrators can upload product images and planograms so that imaging intelligence can compare them to actual shelf images.

Prerequisites

You have purchased SAP Cloud for Customer Imaging Intelligence.

Context

Log on as an administrator and go to ▶ *Administrator* ❯ *Sales and Campaign Settings* ❯ *Open Planocheck Administrator* ❯.

Procedure

1. Upload product images by choosing ▶ *Ricoh* ❯ *Batch Upload*.
   1. Upload metadata as a CSV file.
   2. Upload images in ZIP files.

   The data and images become the baseline for each product that imaging intelligence uses for comparing with items on actual shelves.

2. On the *Planograms* tab, use the button to upload your planograms in .xls or .xlsx format.

   When you upload planograms, they have status *Created*, which means that Ricoh is analyzing them. When the analysis is complete, the planograms have status *OK*.

3. When the planogram reaches status *OK*, edit it to add the following information:

   1. *Attach Stores*
      Add each store in which you want to use this planogram.
   2. Activate it to replace any previous versions.
   3. Update it to save your changes.

4. On the *Manufacturers* tab, add manufacturers.

   On the screen that appears, enter the required information:
   1. Enter the manufacturer's name.
   2. Enter the manufacturer's code, which is the first 8 numbers of the UPC code for that manufacturer.
   3. Under *Customer*, make the appropriate setting:
      - *True* means that you want to display corrective actions for this manufacturer's products
      - *False* means that you do not want to display corrective actions for this manufacturer's products

13.2.2 Show the Share of Shelf

You can personalize your screen to show the *Share of Shelf* for products.

It's important to know the percentage of shelf space for your product to ensure that you are maintaining the agreed-upon amount of space on a shelf or display.

The share of shelf space appears in visits on the *Planograms* tab as a percentage. The SAP solution calculates the manufacturer's share of shelf space less any corrective actions and competitors' share of shelf space.

14 Activity Planning and Routing

Activity planner is used to plan activities such as surveys and tasks that help you achieve different business goals. By using routing rules, you can assign the surveys and tasks to business objects that are associated with specific accounts or territories.

Activity planning enables you to transform marketing initiatives and sales execution strategies into executable surveys and tasks. Let's say there is a new product launch next month. As part of the sales execution plan, every sales representative needs to talk to customers about this event in the next couple of visits. In addition, they need to collect sales data by conducting certain product surveys. As sales operations or key account managers, you can create activity plans that group relevant tasks and surveys. You can then define routing rules and make sure that the right set of tasks and surveys are intelligently assigned to each applicable visit for execution.

You can plan surveys and tasks for multiple objects. For example, you can assign questionnaire surveys that sales representatives must complete when they qualify a lead. Instead of adding standard surveys to each applicable lead, planning activities ahead of time facilitates qualification process and improves your work efficiency as a team. You can also assign customer satisfaction surveys to service tickets and gain insights into sale representatives' service performance.

In addition to tasks and surveys, you can suggest appointments and phone calls using activity planner. Currently, activity plans that contain appointments and phone calls can only be assigned to opportunities or sales quotes.

14.1 Scope and Configure Activity Planning

Administrators can configure the activity planner and the corresponding routing rules using scoping and scoping questions.

14.1.1 Enable Activity Planner

Before users can plan surveys and tasks using activity planner, administrators must add it to the project scope.

Procedure

1. Go to ▶ *Business Configuration* ▶ *Implementation Projects* ◀. Select your project and navigate to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *Account and Activity Management* ▶ *Activity Management* ◀ and check the box next to the scoping item.

2. Go to ▶ *Business Configuration* 〉 *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Sales* 〉 *Account and Activity Management* 〉 *Activity Management* ▶ and enable the scoping question for maintaining activity planners in the system.

3. Assign the *Activity Planner* work center view (ID: *ACTIVITYWORKLIST*) to appropriate users or roles.

Related Information

Create Business Roles and Assign Work Centers and Views

14.1.2 Configure Default Organizational Unit During Activity Plan or Routing Rule Creation

Administrators can set up the solution to pre-populate organizational unit based on the logged-in user who is creating the activity plan or routing rule.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Sales* 〉 *Account and Activity Management* 〉 *Activity Management* ▶.

Under *Activity Planner*, answer the question about defaulting organizational unit based on the logged-in user.

14.2 Create Activity Plans

You can create activity plans to organize standard lists of tasks and surveys. Based on your business needs, the activity plan can be assigned to various business objects. You can also mass upload activity plans via the SAP Cloud for Customer APIs.

Prerequisites

You must have access to the *Activity Planner* work center to create an activity plan.

Context

Activity plans must be used together with routing rules. By using routing rules, the tasks and surveys within an activity plan can be determined and assigned to applicable business objects for further use.

> **i Note**
>
> In addition to tasks and surveys, you can suggest appointments and phone calls using activity planner. Currently, activity plans that contain appointments and phone calls can only be assigned to opportunities or sales quotes. Administrators must add the *Appointments* and *Phone Calls* tabs in an activity planner via adaptation.

Procedure

1. Go to ▌ *Activity Planner* ❯ *Plans* ▐.
2. To create an activity plan, click the plus icon.

   When setting properties for the activity plan, you have following two indicators that you can turn on:

   ○ *Mandatory*
   If you toggle on this button at the activity plan level, all the tasks and surveys that you add to the plan are designated as mandatory by default. This button is also available in each individual task or survey, which you can toggle off as desired.
   It is useful to turn on this option when all or most of your tasks and surveys are mandatory to be completed.

   ○ *Assign Automatically*
   If you toggle on this button at the activity plan level, all the tasks and surveys that you add to the plan allow automatic assignment by default. This button is also available in each individual task or survey, which you can toggle off as desired.
   It is useful to turn on this option when all or most of your tasks and surveys must be assigned automatically.

3. To continue adding tasks and surveys to the activity plan, choose *Save and Open*.
4. To create a task in the activity plan, go to the *Tasks* tab and click *New*.

   For a task to be used in visits, you must clarify the *Frequency*. Choosing *Always* allows the task to be generated in every applicable visit. Choosing *Once* allows the task to be generated only until the task is completed for an account.

   > **i Note**
   >
   > **What happens when you define a frequency of once?**
   >
   > Some tasks and surveys only need to be completed once per account. For example, setting up a promotional display for a major sporting event only needs to be done once, and makes sense only until that sporting event is over.
   >
   > When you define one-time tasks or surveys in the activity planner, your SAP solution handles them as follows:

Handling of One-Time Tasks and Surveys

Your Action	Response of SAP Solution
You complete the one-time task or survey during the first visit.	You don't see that task or survey again for the remainder of the date range defined in the activity plan.
You cancel the visit.	One-time tasks or surveys either: ○ **Automatically** move to next existing or generated visit within the date range defined in the activity plan. ○ Stay in the original visit as incomplete tasks or surveys forever, for example, when the activity plan is no longer in the validity period.
You complete the visit without completing the one-time task or survey.	One-time tasks or surveys either: ○ **Automatically** move to an existing or generated visit within the date range defined in the activity plan. ○ Stay in the original visit as incomplete tasks or surveys forever, for example, when the activity plan is no longer in the validity period.

Here you can also decide whether this particular task is mandatory to be completed and if it must be assigned automatically.

i Note

○ For tasks and surveys that are automatically assigned, they are added to applicable business objects when the routing rules are triggered.
Please check respective object documentation for when and how the routing rules can be triggered.
○ For tasks and surveys that are not automatically assigned, sales users can manually add them to applicable business objects if needed.

5. To add notes and attachments to a task, select the task in the table and you can see the *Notes* and *Attachments* sections pop up.

   Notes and attachments are passed down when tasks are assigned.

6. To attach a survey to the activity plan, go to the *Surveys* tab and click *Add*.

i Note

You can only add surveys that are *Active* to an activity plan.

For a survey to be used in visits, you must clarify its frequency of use. You can also decide whether this particular survey is mandatory to be completed and if it must be assigned automatically.

7. (Optional) Go to the *Organizational Units* tab and define sales units only to which the activity plan applies.

8. (Optional) Go to the *Involvement* tab and define sales employees and units that are involved with the activity plan.

Sales people or groups involved can switch to the *Activity Plans for Me or My Area* view in the activity plan list to see plans that are relevant to them.

9. When you finish creating the activity plan, click *Save*.

Next Steps

Create routing rules to define criteria that a business object must fulfill to receive the activity plan.

Related Information

Create Routing Rules [page 709]

14.2.1 Enable Activity Planner

Before users can plan surveys and tasks using activity planner, administrators must add it to the project scope.

Procedure

1. Go to ▐▶ *Business Configuration* ▶ *Implementation Projects* ▐. Select your project and navigate to ▐▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *Account and Activity Management* ▶ *Activity Management* ▐ and check the box next to the scoping item.
2. Go to ▐▶ *Business Configuration* ▶ *Implementation Projects* ▐. Select your project and navigate to ▐▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *Account and Activity Management* ▶ *Activity Management* ▐ and enable the scoping question for maintaining activity planners in the system.
3. Assign the *Activity Planner* work center view (ID: *ACTIVITYWORKLIST*) to appropriate users or roles.

Related Information

Create Business Roles and Assign Work Centers and Views

14.2.2 Configure Default Organizational Unit During Activity Plan or Routing Rule Creation

Administrators can set up the solution to pre-populate organizational unit based on the logged-in user who is creating the activity plan or routing rule.

Go to ▷ *Business Configuration* 〉 *Implementation Projects* ◣. Select your project and navigate to ▷ *Edit Project Scope* 〉 *Questions* 〉 *Sales* 〉 *Account and Activity Management* 〉 *Activity Management* ◣.

Under *Activity Planner*, answer the question about defaulting organizational unit based on the logged-in user.

14.3 Create Routing Rules

You can create routing rules to assign an activity plan to various business objects. The routing rules contain a series of conditions that a business object must meet to receive certain activity plans.

Prerequisites

You must have access to the *Activity Planner* work center to create a routing rule.

Context

> ! Restriction
>
> Activity plans that contain appointments and phone calls can only be assigned to opportunities or sales quotes.

Following steps show you how to create a routing rule. As to when and how the routing rule can be triggered, please check respective object documentation for details.

Procedure

1. Go to ▷ *Activity Planner* 〉 *Routing Rules* ◣.
2. To create a routing rule, click the plus icon and set properties for the routing rule.

   > i Note
   >
   > Each routing rule only applies to one specific business object.

3. To continue setting up conditions that define this routing rule, choose *Save and Open*.

4. Under the *Conditions* tab, click *Add Group* and define the condition.

   Conditions are structured in groups. When a routing rule is triggered, different condition groups are evaluated as a logical OR relationship; conditions within one group are evaluated as a logical AND relationship.

   To create another condition under the same group, in the *Actions* column of the previous condition you added to the group, click the plus icon.

   > → Tip
   >
   > There are two conditions related to the account hierarchy: *Top-Level Account* and *Higher-Level Account*. In both cases, all accounts that fall under a root account or a higher-level account are affected when that condition is true. However, only the top-level account condition includes itself in the result. If you want to group an entire account hierarchy including the root account, use the *Top-Level Account* condition. To include all accounts that fall under a non-root account, as well as the higher-level account itself, use *Higher-Level Account* and add the higher-level account ID to the condition.

5. To select the activity plans that follow this routing rule, go to the *Activity Plans* tab and click *Add*.

   > → Tip
   >
   > You can see and select activity plans with future dates as follows:
   >
   > 1. In the *Name* field, click the value selection help.
   > 2. In the dialog box appears, click *Advanced Search*.
   > 3. Set the *Valid From* and *Valid To* dates appropriately.

6. (Optional) Go to the *Organizational Units* tab and define sales units only to which the routing rule applies.

7. (Optional) Go to the *Accounts* tab and define accounts or target groups only to which the routing rule applies.

8. (Optional) Go to the *Involvement* tab and define sales employees and units that are involved with the routing rule.

   Sales people or groups involved can switch to the *Routing Rules for Me or My Area* view in the routing rule list to see rules that are relevant to them.

9. When you finish creating the routing rule, click *Save*.

10. Click ▶ *Actions* ❯ *Set as Active* ▶.

    Only active routing rules can be executed.

Related Information

[Create Activity Plans [page 705]](#)

14.3.1 Enable Activity Planner

Before users can plan surveys and tasks using activity planner, administrators must add it to the project scope.

Procedure

1. Go to ▶ *Business Configuration* ▶ *Implementation Projects* ◀. Select your project and navigate to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *Account and Activity Management* ▶ *Activity Management* ◀ and check the box next to the scoping item.

2. Go to ▶ *Business Configuration* ▶ *Implementation Projects* ◀. Select your project and navigate to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *Account and Activity Management* ▶ *Activity Management* ◀ and enable the scoping question for maintaining activity planners in the system.

3. Assign the *Activity Planner* work center view (ID: *ACTIVITYWORKLIST*) to appropriate users or roles.

Related Information

Create Business Roles and Assign Work Centers and Views

14.3.2 Configure Default Organizational Unit During Activity Plan or Routing Rule Creation

Administrators can set up the solution to pre-populate organizational unit based on the logged-in user who is creating the activity plan or routing rule.

Go to ▶ *Business Configuration* ▶ *Implementation Projects* ◀. Select your project and navigate to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *Account and Activity Management* ▶ *Activity Management* ◀.

Under *Activity Planner*, answer the question about defaulting organizational unit based on the logged-in user.

14.4 FAQ for Activity Planning and Routing

Having trouble using activity planner? Check this list of questions and answers for help.

14.4.1 How do I know which routing rules are used for an activity plan?

You can use the cross-referenced fields to find out which activity plans contain a certain routing rule, or which routing rules are used for a particular activity plan.

In the activity plan list, your administrators can adapt the master layout and add the *Routing Rule* field to the advanced search. It allows you to search and sort activity plans based on the routing rule.

Similarly, in the routing rule list, your administrators can adapt the master layout and add the *Activity Plan* field to the advanced search. It allows you to search and sort routing rules based on the activity plan.

15 Perfect Store

You can achieve retail execution excellence with a perfect store.

A perfect store delivers the right product, in stock, at the right time, at the right price. It is a methodology that makes the most of retail execution information and takes a highly disciplined approach to achieving maximum sales. To achieve a perfect store, you must provide an exceptional customer experience at each point of engagement within a store.

A point of engagement is a location where your products are on display for sale and need to be audited in a store. Examples include a promotional display, a regularly stocked shelf, or a cooler. Combining your points of engagements into an engagement map outlines a store or store segment. Engagement maps can include a visual representation of a store layout to assist your sales representatives in completing their tasks.

At each point of engagement, your sales representatives collect data by conducting surveys and answering survey questions. Based on the survey responses, key performance indicators (KPIs) and metrics that administrators have created allow sales representatives to gain real-time insights into the store performance, respond to problems as they occur, and increase field sales efficiency.

The perfect store solution is only available in the SAP Fiori Client.

> **i Note**
>
> Perfect store is not supported on mobile phones.

15.1 Scope and Configure Perfect Store

Administrators can configure perfect store using scoping and scoping questions.

15.1.1 Enable Perfect Store

To use perfect store, administrators must add it to the project scope.

Go to ▢ *Business Configuration* ⟩ *Implementation Projects* ▢. Select your project and navigate to ▢ *Edit Project Scope* ⟩ *Questions* ⟩ *Industry Solution* ⟩ *Consumer Product Extended* ⟩ *Perfect Store Execution* ▢ and check the box next to the scoping item for using perfect store.

15.1.2 Configure Survey-Based Store Scoring

Administrators can enable users to define store scoring based on surveys scores instead of KPI scores.

Go to ▶ *Business Configuration* > *Implementation Projects* ◼. Select your project and navigate to ▶ *Edit Project Scope* > *Questions* > *Industry Solution* > *Consumer Product Extended* > *Perfect Store Execution* ◼ to find the corresponding question about disabling KPI-based scoring.

15.1.3 Configure Store Layouts in Engagement Maps

Administrators can enable users to add store layouts to illustrate the engagement map.

Go to ▶ *Business Configuration* > *Implementation Projects* ◼. Select your project and navigate to ▶ *Edit Project Scope* > *Questions* > *Industry Solution* > *Consumer Product Extended* > *Perfect Store Execution* ◼ to find the corresponding question about setting up an engagement map with visuals.

15.1.4 Configure Perfect Store Visit Creation by Visit Type

Administrators can set up the solution to automatically toggle on the *Perfect Store Visit* indicator during visit creation based on the visit type specified.

Go to ▶ *Business Configuration* > *Implementation Projects* ◼. Select your project and navigate to ▶ *Open Activity List* > *Fine-Tune* > *Maintain Visit Types* ◼. For desired visit types, turn on the *Default Perfect Store* flag.

15.1.5 Configure Task and Survey Determination for Perfect Store Visits

Administrators can enable sales operations or account managers to assign standard tasks and surveys to perfect store visits using activity plans and routing rules. Such tasks and surveys are not considered for perfect store or KPI scoring.

Go to ▶ *Business Configuration* > *Implementation Projects* ◼. Select your project and navigate to ▶ *Edit Project Scope* > *Questions* > *Industry Solution* > *Consumer Product Extended* > *Perfect Store Execution* ◼ to find the corresponding question about enabling standard worklist determination for perfect store visits.

Related Information

Add Surveys or Tasks to Visits [page 654]
Activity Planning and Routing [page 704]

15.1.6 Configure Automatic Refresh for Perfect Store Visits

Administrators can define conditions in workflows to trigger a refresh of visits. These rules also apply to perfect store visits.

A refresh in a visit triggers the assignment of applicable activity plans that include a standard list of surveys and tasks. For perfect store visits, a refresh also triggers the determination of associated engagement maps, points of engagement, objectives, and so on.

Related Information

Configure Automatic Refresh for Visits [page 646]

15.1.7 Configure KPI Score Display with Decimals

Administrators can set up the system to show KPI values with two decimal places and increase precision in the measurement.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Industry Solution* ❯ *Consumer Product Extended* ❯ *Perfect Store Execution* ❯ to find the corresponding question about displaying KPI values in decimal.

15.2   Build Engagement Maps

An engagement map represents a store layout or a segment that consists of several points of engagement where a sales representative must go to evaluate product displays, for example. Per engagement map, you can define key performance indicators and metrics based on the data to be collected during retail audits.

Create Engagement Maps [page 716]
> You can create an engagement map, assign points of engagement, set up key performance indicators (KPIs), and define store scoring.

Copy Engagement Maps [page 720]
> You can create an engagement map with less time and effort by copying an existing engagement map.

Create Versions of Engagement Maps [page 720]
> You can create versions of an engagement map to accommodate any layout changes.

Set Engagement Maps to Obsolete [page 721]
> If an engagement map is no longer valid for any accounts, you can set the engagement map to *Obsolete*.

15.2.1 Create Engagement Maps

You can create an engagement map, assign points of engagement, set up key performance indicators (KPIs), and define store scoring.

Context

If the administrator has enabled survey-based scoring methodology for measuring store performance, KPI-based store scoring setup in not available in the engagement map creation.

Procedure

1. Go to ▌ *Activity Planner* ❯ *Engagement Maps* ▐ and click *New*.
2. Enter a description and validity period for your engagement map.
3. Choose a *Scale* for scoring.
4. Set threshold values as benchmarks for your scoring result, and enter a legend for each range.

   The threshold that is set for an engagement map is used to display the overall perfect store score for a visit.

   > **i Note**
   >
   > **About Perfect Store Scoring and Threshold Setting**
   >
   > For the store score and each scoring-relevant KPI, you can define two or three score ranges. A threshold is used to define the dividing point between two ranges. Each range has a color indicator that is assigned as visual representation. Available color indicators are green, yellow, and red. Green is for good, yellow is for fair, and red is for poor. By default, the green range is assigned to the higher side of the scale. You can reverse the colors for the higher and lower ranges as needed.

5. Add any relevant *Notes*, *Sales Organizations*, or *Attachments*, and click *Next*.

   > **→ Tip**
   >
   > Under *Attachments*, you can upload a ▌ *Local File* ❯ *Store Layout* ▐ as a visual representation of the store. You can plot points of engagement on the image that can visually guide sales representatives through the store visit.

6. Assign points of engagements to your engagement map in one of the following ways.
   - Add reusable points of engagement that you've predefined in the *Points of Engagement* work center.
   - Create points of engagement that are specific to this engagement map.
     1. Click *Create New*.
     2. Proceed just as you would to create a reusable point of engagement.
     3. Once you finish defining all the components in the point of engagement, click ▌ *Actions* ❯ *Activate* ▐.

4. Go back to the new engagement map, and above the points of engagement table, click *Add*.

5. Under the *Specific Points of Engagement* section, select the point of engagement you created and click *OK*.

7. Prioritize the order of the points of engagement, and click *Next*.

8. Assign the engagement map to relevant customers and target groups, and click *Next*.

> → Tip
>
> When you add an account to the engagement map, a checkbox *Include Account Hierarchy* allows you to add children accounts under the chosen account in an account hierarchy.

> i Note
>
> Only one engagement map can be used per visit per customer. However, as engagement maps can be created for accounts, target groups, and account hierarchies, it may result in one account being assigned to multiple engagement maps due to the hierarchy structure. In this case, an error message is displayed and the most recently created engagement map is used for the visit.

9. Set up KPIs. Detailed instructions are documented in separate topics.

10. Specify the *Sort Order* in which the KPIs should display in store score summary during visit execution, and click *Next*.

> i Note
>
> KPIs with the same sequence number are displayed together in the KPI summary. KPIs with no sequence number show at the end of the list.
>
> A logically ordered list of KPIs makes for easy and intuitive interpretation of store metrics for sales representatives.

11. Set up store scoring using relevant KPIs that you defined in the previous step, and click *Next*.

12. Define corrective actions to be proposed when the store score or a KPI falls in yellow or red score range.

    This step intends to help sales reps take immediate actions in response to store scores or KPIs that don't meet desired thresholds. For store performance or each KPI, you can suggest one or multiple actions including questions, surveys, and tasks. Those actions can be mandatory or optional.

13. To save your engagement map as *In Preparation*, click *Finish*.

14. Activate the engagement map when all the components are ready for use.

Results

When a visit is created for a relevant account with an active engagement map, you can use perfect store features during that visit.

Related Information

[Create Reusable Points of Engagement \[page 722\]](#)

15.2.1.1 Plot to Assign Points of Engagement on a Store Layout

You can assign or create points of engagement directly on a store layout image.

Prerequisites

Administrators have enabled visuals in engagement map.

You have attached a ▶ *Local File* ❯ *Store Layout* ❯ as a visual representation of the store.

Context

This task shows you how to assign points of engagement on a store layout as you create an engagement map.
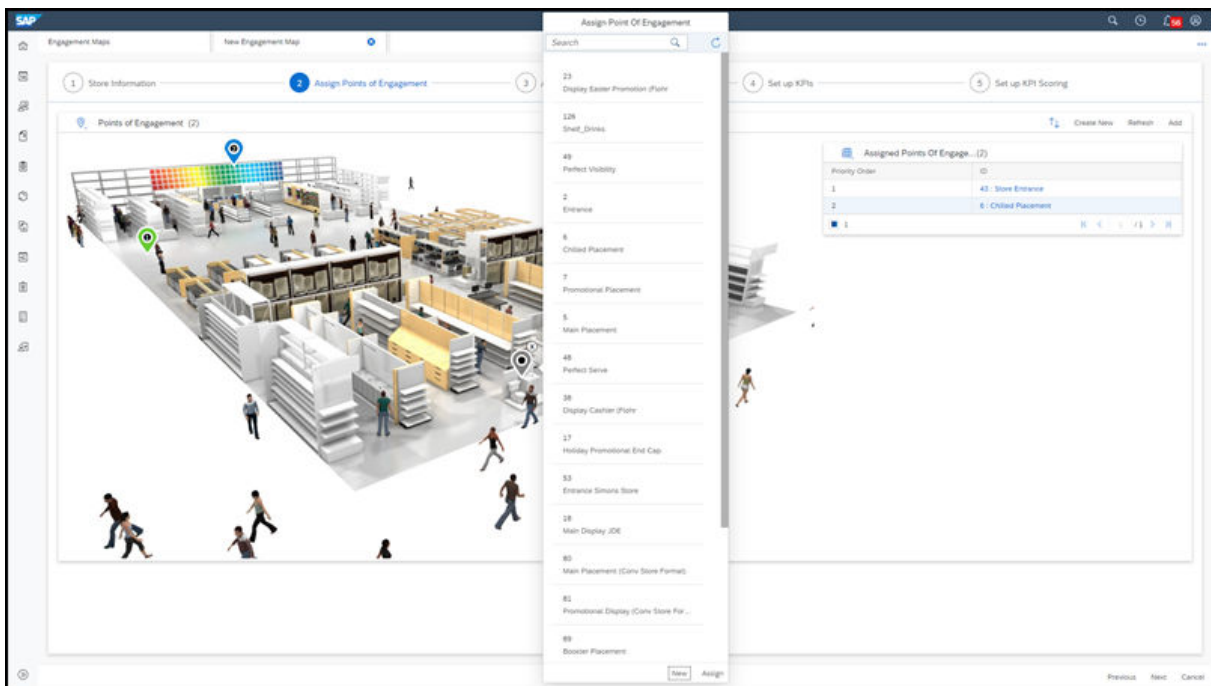
Procedure

1. During the creation of an engagement map, as you assign points of engagement, choose the *Map View*. The layout image displays.
2. Click a location on your image and drop a pin.
3. Click the pin, and the point of engagement list displays.
4. You can assign a reusable point of engagement or create a point of engagement that is specific to the engagement map.
   - Select an existing point of engagement from the list and click *Assign*.

     > → Tip
     >
     > Before you assign a point of engagement, you can change the pin location by removing and redropping. After you assign a point of engagement, if you want to change the pin location, drop another pin at the desired location and assign the same point of engagement once again. The previous pin gets removed automatically.
     >
     > The number in each pin corresponds to the priority order of a point of engagement. If a point of engagement is not mapped to a pin on the layout image correctly, you can reprioritize the order of the points of engagement.

   - Click *Create* and the point of engagement creation screen pops up. Proceed as you would to create a reusable point of engagement and activate the point of engagement.

     > i Note
     >
     > Only active points of engagement are considered in KPI or store scoring.

5. When you finish assigning all the points of engagement, click *Next* to continue creating the engagement map.

Results

When executing a perfect store visit, sales representatives can choose the map view to view this image and easily identify the points of engagement within a given location.

15.2.1.2 Configure Store Layouts in Engagement Maps

Administrators can enable users to add store layouts to illustrate the engagement map.

Go to ▶ *Business Configuration* > *Implementation Projects* ⟩. Select your project and navigate to ▶ *Edit Project Scope* > *Questions* > *Industry Solution* > *Consumer Product Extended* > *Perfect Store Execution* ⟩ to find the corresponding question about setting up an engagement map with visuals.

15.2.2 Copy Engagement Maps

You can create an engagement map with less time and effort by copying an existing engagement map.

Procedure

1. Copy an engagement map from the list or in the detail view of an engagement map.
   - In the engagement map list:
     1. Select the engagement map that you want to copy.
     2. From *More* options, click *Copy*.
   - In the detail view of the engagement map that you want to copy:
     1. Click ▶ *Actions* ❯ *Copy* ▶.

   A new engagement map opens with most information copied over, **except** the following:
   - Attachments and notes
   - Points of engagement that are not maintained in the points of engagement list and that are only specific to the engagement map
   - Points of engagement that are deactivated for survey-based store scoring
   - Key performance indicators (KPIs)
   - KPI scoring information when KPI-based store scoring is enabled
2. Proceed through tabs and edit settings as required to create the engagement map.
3. Review your entries and click *Save*.
4. When all the components in the engagement map are ready for use, click ▶ *Actions* ❯ *Activate* ▶.

Related Information

Create Engagement Maps [page 716]

15.2.3 Create Versions of Engagement Maps

You can create versions of an engagement map to accommodate any layout changes.

Procedure

1. In the detail view of an engagement map, click ▶ *Actions* ❯ *Create Version* ▶.

   When you create a version, the solution copies all the information in the existing engagement map into a new version.

2. Proceed through tabs and edit settings as required to create the version of the engagement map.

   In the new version, you can redefine store layout, points of engagement, key performance indicators, and metrics.

3. Review your entries and click *Save*.

4. When all the components in the engagement map are ready for use, click ▌▶ *Actions* ❯ *Activate* ▐.

   As soon as you activate the new version, the previous version of engagement map becomes *Obsolete* automatically.

Related Information

15.2.4 Set Engagement Maps to Obsolete

If an engagement map is no longer valid for any accounts, you can set the engagement map to *Obsolete*.

15.3   Define Points of Engagement

Points of engagement are specific locations where sales representatives collect data and perform retail audits in a store. You can create reusable points of engagement or points of engagement that are specific to an engagement map.

- **Reusable points of engagement** are created in *Points of Engagement* and can be added to multiple engagement maps.
- **Specific points of engagement** are created from within an engagement map and can only be used in that engagement map.

For each point of engagement, administrators can add mandatory or voluntary surveys, survey questions, and tasks that sales representatives must complete at that particular location.

   You can create a point of engagement that can be reused in multiple engagement maps.

   You can create a point of engagement with less time and effort by copying an existing point of engagement.

   If a reusable point of engagement is no longer valid for any engagement maps, you can set the point of engagement to *Obsolete*.

15.3.1 Create Reusable Points of Engagement

You can create a point of engagement that can be reused in multiple engagement maps.

Context

A point of engagement created in *Points of Engagement* can be reused in multiple engagement maps. A point of engagement created in an engagement map is not reusable and only specific to that engagement map. This task shows you how to create a reusable point of engagement.

Procedure

1. Go to ▌▶ *Activity Planner* ▶ *Points of Engagement* ▐ and click the plus icon.
2. Enter a description for your point of engagement.
3. (Optional) If you have a registered product that you want to assign to the point of engagement, search for the associated product and add the *Asset ID*. Registered products are determined for the account at the time of a visit and included in relevant registered product surveys.

   > **i Note**
   >
   > You can add only one asset ID to each point of engagement. However, if there are multiple registered products assigned to the product ID and the associated account in a visit, all the assigned registered products are included.

4. To add further details, click *Save and Open*.
5. To edit details of the point of engagement, click the pencil icon.
6. In *Details*, maintain the validity period for your point of engagement.

   Points of engagement can be valid for a specific date range or for an unlimited amount of time. Once a validity period is over, you can no longer add the point of engagement to an engagement map. If the point of engagement is used in an engagement map, once the validity period ends, it cannot be used for any scoring calculations. You can also create points of engagement with future validity dates for scenarios such as an upcoming display or a seasonal promotion. The point of engagement, including the associated surveys, cannot be used for scoring until the point of engagement is valid.

7. In *Details*, add notes to provide sales representatives with additional information at a point of engagement during visit execution.

   Notes are read-only during a visit.

8. Under the *Surveys* tab, add surveys and define if they are mandatory for completion.
9. Under the *Questions* tab, add up to two questions from your question bank and define if they are mandatory for completion.

   Eligible questions include multiple choice single select and multiple choice multi select.

> **i Note**
>
> Once questions are added to the point of engagement, further changes made to questions in the question bank are not reflected in the point of engagement. The questions must be updated in the point of engagement individually.

10. Under the *Tasks* tab, create tasks and define if they are mandatory for completion.
11. Under the *Organization Units* tab, add relevant organizational units.
12. Under the *Attachments* tab, add relevant content such as display diagrams and product layouts.

    Attachments are read-only during a visit.
13. *Save* your entries.
14. When the point of engagement is ready for use, click ▌▶ *Actions* ❯ *Activate* ❚.

    You must activate the point of engagement before you can add it to an engagement map.

> **i Note**
>
> If an active point of engagement is used in an engagement map, you cannot further edit it. To edit an active point of engagement that is not used in any engagement map, click ▌▶ *Actions* ❯ *Set as In Preparation* ❚ and then make your changes.

15.3.2 Copy Reusable Points of Engagement

You can create a point of engagement with less time and effort by copying an existing point of engagement.

Procedure

1. Copy a point of engagement from the list or in the detail view of a point of engagement.
   - In the point of engagement list:
     1. Select the point of engagement that you want to copy.
     2. From *More* options, click *Copy*.
   - In the detail view of the point of engagement that you want to copy:
     1. Click ▌▶ *Actions* ❯ *Copy* ❚.

   A new point of engagement opens with most information copied over, **except** the following:
   - Attachments and notes
   - Surveys and questions with expired validity
   - Surveys and questions that are deactivated for survey-based store scoring
2. Proceed through tabs and edit settings as required to create the point of engagement.
3. Review your entries and click *Save*.
4. When the point of engagement is ready for use, click ▌▶ *Actions* ❯ *Activate* ❚.

Related Information

15.3.3 Set Points of Engagement to Obsolete

If a reusable point of engagement is no longer valid for any engagement maps, you can set the point of engagement to *Obsolete*.

For survey-based store scoring, before you can change the status of the point of engagement, you must clear weightages for this point of engagement in all engagement maps.

> → Tip
>
> In a point of engagement, you can go to the *Engagement Maps* tab to check all the engagement maps where the point of engagement is assigned.

15.4 Set Up Simple Key Performance Indicators (KPIs)

You can build your own key performance indicators (KPIs) to evaluate key business metrics within the context of a store. Such metrics can further contribute to measuring the overall store performance.

KPIs are created per engagement map. You can set up KPIs during engagement map creation or in the detail view of an existing engagement map. The KPI calculation is based on responses from surveys or questions that are associated with different points of engagement in the engagement map.

You can create simple KPIs when your metrics only require simple summation or comparison logic. For example, measure the total number of responses that match a specified value, or responses that reach a desired value as compared to a reference target.

Create Simple Calculation KPIs [page 725]
    Measure performance based on a quantity calculation.

Create Simple Comparison KPIs [page 726]
    Measure performance based on the comparison of an audit response against a specified audit field value.

15.4.1 Create Simple Calculation KPIs

Measure performance based on a quantity calculation.

Context

You can set up KPIs during the creation of an engagement map or in an existing engagement map. This task shows you how to create a simple calculation KPI in an existing engagement map.

Procedure

1. Open an engagement map.

   > **i Note**
   >
   > You can only edit and add KPIs to an engagement map that is *In Preparation*.

2. Under the *KPIs* tab, next to *Simple KPIs - Calculation*, click *Add*.
3. Enter a name for your KPI.
4. Enter a *Tag* as a short code for your KPI. This field is mandatory.

   For example, you can use `OSA` to represent your KPI that is created for checking on-shelf availability.

5. Set threshold values as benchmarks for your scoring result, and enter a legend for each range.
6. Define KPI components that are derived from responses from product surveys.
   a. Select a point of engagement.

      Only points of engagement that have a product survey assigned are available for selection.
   b. Select a survey, a question, and a response.

      For each point of engagement, you can add only one response per question per survey.

Eligible question options include multiple choice single select and multiple choice multi select.

During store audits, if the sales representative chooses the same answer that you have defined here, a value of one goes into the calculation. Other responses are valued at zero points.

  c. *Add* the component to your KPI.
  d. Define as many components as you need.
7. When you finish, click *OK*.

Example

You can create a simple calculation KPI to check items that are out of stock. The KPI uses a survey question that asks if a product is in stock. Select the answer 'No, the product is not in stock' as the response option for your KPI component. If the product is out of stock, the product gets one point. Otherwise, the product gets zero point. Each product in the product survey gets one or zero point, and the points are aggregated into an overall score. Set the overall score threshold to determine what is a green outcome and what is a red outcome. For example, you may set the threshold at 65 on a 100-point scale. If 65% or more products are out of stock, your score is displayed in red. If less than 65% of products are out of stock, your score is displayed in green.

15.4.2 Create Simple Comparison KPIs

Measure performance based on the comparison of an audit response against a specified audit field value.

Prerequisites

You must include *Product Extension Fields* or *Product List Extension Fields* question type in the associated product survey. Those questions are used as reference questions to set up comparison KPIs.

Context

You can set up KPIs during the creation of an engagement map or in an existing engagement map. This task shows you how to create a simple comparison KPI in an existing engagement map.

Procedure

1. Open an engagement map.

    > **i Note**
    >
    > You can only edit and add KPIs to an engagement map that is *In Preparation*.

2. Under the *KPIs* tab, next to *Simple KPIs - Comparison*, click *Add*.
3. Enter a name for your KPI.
4. Enter a *Tag* as a short code for your KPI. This field is mandatory.

    For example, you can use OSA to represent your KPI that is created for checking on-shelf availability.

5. Set threshold values as benchmarks for your scoring result, and enter a legend for each range.
6. Define KPI components that are derived from responses from product surveys.
    a. Select a point of engagement.

        Only points of engagement that have a product survey assigned are available for selection.
    b. Select a survey, a question, and a reference question.

        For each point of engagement, you can add only one response per question per survey.

        Eligible question options include questions with quantity or amount answer types.

        During store audits, if the answer that the sales representative chooses matches the answer to the reference question, a value of one goes into the calculation. If not, a value of zero is counted in the calculation.
    c. *Add* the component to your KPI.
    d. Define as many components as you need.
7. When you finish, click *OK*.

Example

You can create a simple comparison KPI to check promotional pricing compliance. The KPI compares the actual in-store price to the promotional price. Select one question that asks for 'actual sales price' and one reference question that asks for 'target sales price' as your components. If the actual sales price matches the target sales price, the product gets one point. Otherwise, the product gets zero points. Each product in the product survey gets one or zero points, and the points are aggregated into an overall score. Set the overall score threshold to determine what is a green outcome and what is a red outcome. For example, you may set the threshold at 8 on a 10-point scale. If 80% or more products have the correct pricing, your score is displayed in green. Otherwise, your score is displayed in red.

15.5   Set Up Advanced Key Performance Indicators (KPIs)

You can build your own key performance indicators (KPIs) to evaluate key business metrics within the context of a store. Such metrics can further contribute to measuring the overall store performance.

KPIs are created per engagement map. You can set up KPIs during engagement map creation or in the detail view of an existing engagement map. The KPI calculation is based on responses from surveys or questions that are associated with different points of engagement in the engagement map.

You can create advanced KPIs when your metrics involve complex logic and you want to build flexible formulas using various operators and variables across audits. Advanced KPIs also allow you to use other KPIs as variables in the calculations.

Create Advanced KPIs [page 729]
> Learn how to build advanced KPIs using the formula editor.

Define Focus Products in Advanced KPIs [page 731]
> Focus products, also known as hero products, are central to your brand and probably drive the most customer loyalty. When you measure important metrics, such essential products can hold more weightage in the calculation.

Constants in Advanced KPIs [page 732]
> When you create a KPI at the survey level and a product survey is selected for defining variables, we provide a list of standard constants to help you build formulas.

Operators in Advanced KPIs [page 732]
> The table lists available operators we offer in the advanced KPI formula editor.

Functions in Advanced KPIs [page 733]
> The table lists available functions we offer in the advanced KPI formula editor.

15.5.1 Create Advanced KPIs

Learn how to build advanced KPIs using the formula editor.

Context

You can set up KPIs during the creation of an engagement map or in an existing engagement map. This task shows you how to create an advanced KPI in an engagement map that has already been created.

Procedure

1. Open an engagement map.

   > **i Note**
   >
   > You can only edit and add KPIs to an engagement map that is *In Preparation*.

2. Under the *KPIs* tab, next to *Advanced KPIs*, click *Add*.
3. Enter a name for your KPI.
4. Select the KPI *Level*.

   Create a KPI at the *Survey* level when:
   - All the variables that are used to build the KPI come from one single survey
   - You want to define focus products that need to be weighed higher in the KPI calculation

   Create a KPI at the *Engagement Map* level when:
   - Variables that are used to build the KPI come from multiple surveys
   - You want to use other KPIs as variables in the KPI calculation

   Available building blocks for each type of KPI

KPI Level	Product Surveys	Checklist Sur-veys	Questions	KPIs	Focus Products
Survey Level	Yes	Yes	Yes	No	Yes
Engagement Map Level	Yes	Yes	Yes	Yes	No

5. Select whether the KPI is *Scoring Relevant*.
   - *Scoring* relevant KPIs are calculated and displayed as metrics when sales representatives audit the point of engagement to which the surveys used to build the KPIs are assigned. Scoring relevant KPIs can also be used to build compound KPIs at the engagement map level.
   - *Non-Scoring* relevant KPIs are not displayed as metrics during perfect store visit execution. Non-scoring relevant KPIs are only used to build compound KPIs at the engagement map level.

6. Enter an *Identifier Tag* as a short code for your KPI. This field is mandatory.

    For example, you can use `OSA` to represent your KPI that is created for checking on-shelf availability.

7. If you want the system to interpret an unanswered numeric, quantity, or amount field value as zero during calculation, toggle on the *Calculate No Response As Zero* button. It reduces errors in KPI calculations, allowing the ease of use for sales representatives when they respond to large sets of questions.

    > i Note
    >
    > The flag must be added via adaptation and personalization.

8. Enable *Target* to define a specific score as the performance milestone that the KPI should achieve.

    The target score can be either static or dynamic. A static target value must be a positive constant within the scale. A dynamic target can be designated using an extension field at the account header level. The value is determined based on the actual account during visit execution.

    You can toggle on the option *Show with KPI* so the target can be displayed with the actual score in the KPI summary.

9. Set threshold values as benchmarks for your scoring result, and enter a legend for each range.

    If you have specified a KPI target in the previous step, you have the flexibility to set dynamic thresholds based on the target. Define scoring ranges in percentage, and the thresholds are calculated as percentage of the target.

10. Define KPI variables that are derived from responses from surveys or survey questions.

    a. Select a point of engagement.

        Surveys or questions that are valid for the KPI level and the point of engagement become available for selection.

    b. Select a survey, a question, and a response when applicable.

    c. Enter an identifier tag as a short code for this particular variable, and press `Enter` on your keyboard.

        For example, you can use `R1` to represent your first response variable.

    d. Click *Add to Variables*.

    e. Define as many variables as you need to create the KPI formula.

    > i Note
    >
    > When you create a KPI at the engagement level, you can also use other KPIs as variables. As a prerequisite, those KPIs must be previously defined in the same engagement map before they can be added as variables.
    >
    > Depending on which KPI level and survey you select, the solution may offer a predelivered list of constants.

11. If you create the KPI at the survey level and select a product survey for variables, you can define focus products with distinct weightages to be considered in the KPI calculation.

    o   *Static Focus Products* allows you to define weightages for individual focus products.

    o   *Dynamic Focus Products* allows you to define the weightage for a group of focus products that fall into a specific product classification within a survey.

12. Build your KPI formula using available functions and operators.

13. Click *Check* to validate the formula for consistency.

14. When you finish, click *OK*.

Related Information

15.5.2 Define Focus Products in Advanced KPIs

Focus products, also known as hero products, are central to your brand and probably drive the most customer loyalty. When you measure important metrics, such essential products can hold more weightage in the calculation.

For the same metric that is being measured, one focus product can hold different weightages at different points of engagement. For example, your new products can account for a 100 percent weightage at the promotional display, and weigh less than 100 percent yet still higher than other products on the shelf. Considering such scenarios, we only allow focus product weightages to be defined and applied for KPIs that are created at the survey level.

When you create a KPI at the survey level and a product survey is selected for defining variables, you can define focus products in your KPI details under following two categories:

- *Static Focus Products*
  Under this category, you can add individual focus products and assign a distinct weightage to each one of them.
  Sometimes, the performance of your focus products can be crucial. If your focus products do not perform up to standard, your KPI must display a red flag, no matter how well your other products perform. For such cases, we allow you to apply following rules to focus products in the KPI calculation:
  - *AND Condition* - The KPI score is calculated only when all the focus products match the response or meet the condition defined in the formula. Otherwise, the KPI score is zero.
    For example, you want to measure the on-shelf availability for your products. You added Product A, B, and C as focus products to your KPI, and applied AND condition. In this case, if Product B is out of stock yet Product A and C are in stock, the KPI score is zero.
  - *OR Condition* - The KPI score is calculated when any one of the focus products with this option checked matches the response or meets the condition defined in the formula. Otherwise, the KPI score is zero.

Let's use the same example of measuring the on-shelf availability for your products. Instead of using AND condition, you checked OR condition at each item level for all of your Product A, B, and C. In this case, if Product B is in stock yet Product A and C are out of stock, the KPI score is still calculated.

- *Dynamic Focus Products*
  Under this category, you can define the weightage for a group of focus products that fall into a specific product classification in a survey. The weightage defined for the group is evenly distributed among the focus products that are determined at runtime of a store visit.
  For example, you added a group of focus products that are marked as 'Essential' in the survey and assigned a 60 percent weightage to the group. During the visit runtime, the solution identifies six 'Essential' products. A total of 60 percent weightage is then evenly distributed among the six 'Essential' products. Each product holds a 10 percent weightage in the KPI calculation. If there are no static focus products defined, the remaining 40 percent weightage is evenly distributed among non-focus products.

Related Information

15.5.3 Constants in Advanced KPIs

When you create a KPI at the survey level and a product survey is selected for defining variables, we provide a list of standard constants to help you build formulas.

- Total number of products from the survey
- Total number of static focus products from the survey
- Total number of dynamic focus products from the survey
- Total number of focus products from the survey - A sum of all the static and dynamic focus products defined for the KPI

15.5.4 Operators in Advanced KPIs

The table lists available operators we offer in the advanced KPI formula editor.

Operators

Operator	Description
+	Calculates the sum of operand 1 and operand 2.
-	Subtracts operand 2 from operand 1.
*	Calculates the product of operand 1 and operand 2.
/	Divides operand 1 by operand 2.

Operator	Description
( )	Groups and sets the order of operators.
<	Less Than
<=	Less Than or Equal to
>	Greater Than
>=	Greater Than or Equal To
==	Equal To
!=	Not Equal To
AND	Logical AND The result is 1 if both operand 1 and operand 2 do not equal 0. Otherwise, the result is 0.
OR	Logical OR The result is 1 if operand 1 or operand 2 does not equal 0. Otherwise, the result is 0.

15.5.5 Functions in Advanced KPIs

The table lists available functions we offer in the advanced KPI formula editor.

Functions

Function	Description	Syntax Example

COUNT	Returns the total number of the variables that have been defined. The variables are responses from one or multiple surveys. Variables can be set with or without conditions.	`COUNT(R1)`
		
		`COUNT(R1 AND R2>0)`

SUM	Returns the total value of the variables that have been defined. The variables are sequence of numbers which can be amount, quantity, or numeric fields from one or multiple surveys.	`SUM(R1)` **i Note** When the variable is a response from a product survey, SUM is used to add responses from all the products determined in that survey.
COUNT FP.	Returns the total number of focus products matching the variables that have	`COUNT FP.(R1)`

Function	Description	Syntax Example
	been defined. The variables are responses from one or multiple surveys. Variables can be set with or without conditions.	`COUNT FP.(R1 AND R2>0)`
SUM FP.	Returns the total value of the variables that have been defined and received from focus products. The variables are sequences of numbers which can be amount, quantity, or numeric fields from one or multiple surveys.	`SUM FP.(R1)` **i Note** SUM FP. is used to add responses from all the focus products determined in the survey.

AGG.WT.	Returns a total weighed count of the variables that have been defined. The variables are responses from one single survey. Variables can be set with or without conditions.
	
	i Note
	You can only use AGG.WT. when focus products are defined.
		`AGG.WT.(R1)`
		
		`AGG.WT.(R1 AND R2>0)`

SCALE	Normalizes calculations measured in a KPI using the scale that is set per engagement map. **⁂ Example** Let's say you defined a KPI to count items that are out of stock. During store audits, the sales representative found that 8 out of 10 products were out of stock. As a result, if the score scale is 1, the KPI score is 0.8. If the score scale is 100, then the KPI score is 80.	`AGG.WT.(R1)*SCALE`

15.6 Measure Store Performance

You can use either KPI scores or survey scores as input to calculate the overall store score.

KPI-based scoring is provided as the default option. If you want to use survey scores as basis to measure store performance, your administrator can switch to survey-based scoring methodology in scoping questions.

KPI-based scoring allows you to use the store metrics that you measure as score factors to further evaluate the overall store performance.

Survey-Based Store Scoring [page 737]
Survey-based store scoring allows you to calculate a perfect store score for a visit based on survey and question scores.

15.6.1 KPI-Based Store Scoring

KPI-based scoring allows you to use the store metrics that you measure as score factors to further evaluate the overall store performance.

- Use KPI scores to calculate a perfect store score
  You can assign weightages to KPIs that are relevant for measuring the store performance. The store score is an aggregation of the weighted KPI scores.
- Use KPI points to calculate a perfect store score
  For some KPIs, a higher score is better; for others, lower is better. For example, when you measure out-of-stocks, a low score is considered good whereas a high score is unfavorable. In this case, by simply aggregating weighted KPI values, the final score cannot reflect the store performance accurately. Therefore, we introduce the concept of KPI points.
  In addition to KPI weightages, you can assign points to each score range that a KPI may fall into during visit execution. When you measure KPIs such as the out-of-stock percentage, the red score range which indicates a bad performance is assigned to the higher side of the scale. In this case, you can assign fewer points to the red score range so that a low value is accounted for in the store scoring when the KPI score is high.
  At runtime, all the KPIs that are relevant for measuring the store performance receive certain points based on the score range they fall in. The store score is an aggregation of the weighted KPI points.

15.6.1.1 Use KPI Scores to Calculate a Perfect Store Score

Learn how to measure store performance using KPI scores.

Context

You can set up perfect store scoring during the creation of an engagement map or in an existing engagement map. This task shows you how to assign weightages to your metrics that aggregate to the final store score in an existing engagement map.

Procedure

1. Open an engagement map.

2. Go to the *KPI Scoring* tab.

3. Click *Add*, select KPIs that are relevant for store scoring, and click *OK*.

   Only the KPIs that are valid for this particular engagement map are available for selection.

4. Assign a weightage to each of the KPIs that you add.

5. *Save* your entries.

Results
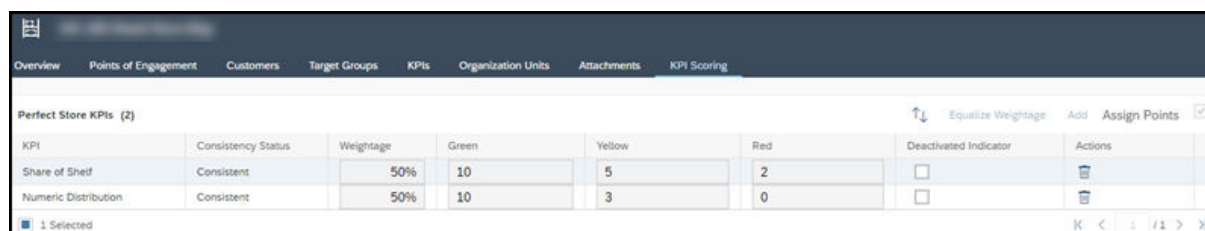
During visit execution, based on the audit responses a sales representative enters, KPI scores are calculated in real time. The final score is calculated by summing up the weighted scores of KPIs that are relevant for store scoring.

15.6.1.2 Use KPI Points to Calculate a Perfect Store Score

Learn how to measure store performance using KPI points.

Context

You can set up perfect store scoring during the creation of an engagement map or in an existing engagement map. This task shows you how to assign weightages and points to your metrics that aggregate to the final store score in an existing engagement map.

Procedure

1. Open an engagement map.

2. Go to the *KPI Scoring* tab.

3. Click *Add*, select KPIs that are relevant for store scoring, and click *OK*.

   Only the KPIs that are valid for this particular engagement map are available for selection.

4. Assign a weightage to each of the KPIs that you add.

5. Check *Assign Points*.

When the option is checked, three columns appear with each representing a score range. Green is for good, yellow is for fair, and red is for poor. The threshold for each range is defined per KPI.

> **i Note**
>
> For KPIs that only have two score ranges, the *Yellow* column is not editable.

6. Assign points to each score range that the KPI score may fall into during visit execution.

   For example, a KPI that measures items that are out of stock can get full points if it falls in the green range and zero points if it falls in the red range.

   > **i Note**
   >
   > The highest point must not exceed the scale that is set per engagement map.

7. *Save* your entries.

Results

During visit execution, based on the audit responses a sales representative enters, KPIs are calculated in real time. Depending on how you have defined the benchmarks for the scoring result, the scored KPI falls into a score range and receives corresponding points. The final store score is calculated by summing up the weighted points of KPIs that are relevant for store scoring.

15.6.2 Survey-Based Store Scoring

Survey-based store scoring allows you to calculate a perfect store score for a visit based on survey and question scores.

As prerequisites, administrators must enable survey-based store scoring for perfect store via a scoping question and complete following steps:

- Define survey and question scoring in *Surveys*.
- Define weightages for each survey and question that is relevant for scoring in each point of engagement. If the weightage and score value of a survey or question no longer need to be calculated for a point of engagement, you can deactivate the survey or question in the point of engagement.
- Define weightages for each point of engagement that is relevant for scoring in the engagement map. If the weightage and score value of a point of engagement no longer need to be calculated for a store score, you can deactivate the point of engagement in the engagement map.

Example

In a visit, there are two points of engagement. Point of Engagement 1 has two surveys with equal weightage, and Point of Engagement 2 has one survey and one question with equal weightage. The scoring is calculated as follows:

Point of Engagement 1	Weightage	Score	Score in Point of Engagement
Survey A	50%	40/50	50% x 40/50 = 40/100
Survey B	50%	40/100	50% x 40/100 = 20/100
Total Score = 60/100			

Point of Engagement 2	Weightage	Score	Score in Point of Engagement
Survey C	50%	20/50	50% x 20/50 = 20/100
Question D	50%	30/100	50% x 30/100 = 15/100
Total Score = 35/100			

Perfect Store Score	Weightage	Score
Point of Engagement 1	50%	50% x 60/100 = 30/100
Point of Engagement 2	50%	50% x 35/100 = 17.5/100
Total Score (on a Scale of 100) = 47.5/100		

When the score scale is set at 1, the overall store score is 0.475. When the score scale is set at 10, the overall store score is 4.75.

15.6.2.1 Configure Survey-Based Store Scoring

Administrators can enable users to define store scoring based on surveys scores instead of KPI scores.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◀. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Industry Solution* ❯ *Consumer Product Extended* ❯ *Perfect Store Execution* ◀ to find the corresponding question about disabling KPI-based scoring.

15.7 Complete Perfect Store Visits

During a visit, sales representatives can use perfect store features and view real-time insights into store performance.

Prerequisites

The engagement map is determined at the time of the visit based on the sales organizations and accounts. Prior to visit execution, make sure that the determination is triggered and you obtain all the objectives for your perfect store visit.

Context

Procedure

1. In the visit, under *Perfect Store*, click ▶ *Actions* ❯ *Start Perfect Store Execution* ▶.
2. Complete objectives assigned to each point of engagement.
3. Click the score badge for *This Visit Score*.

   For survey-based store scoring, clicking the visit score badge also calculates scores for all the points of engagement.
4. Under each point of engagement, view KPI scores for respective point of engagement, and drill down into each KPI for more details.
5. Click *Insights* next to the score badge to view score summary, KPI breakdowns, and trends.

   Advanced KPI details are available for scoring KPIs in online mode only. For KPIs that are built from product survey variables and only involve COUNT calculations, you can see the breakdown of product compliance. For KPIs that only involve SUM calculations, you can see relevant variables and values in the KPI details. Drilldown information isn't available for KPIs with both COUNT and SUM functions used in the formula.

   > ! Restriction
   >
   > Variables derived from a multiple choice multiple select question aren't displayed.

   For a compound KPI, or a KPI that uses other KPIs as variables, you can expand the KPI to see details of each contributing KPI. However, only one level of drilldown information is supported. For example, if KPI 1 is built upon KPI 2 and KPI 2 is built upon KPI 3, only KPI 2 details are available under KPI 1.
6. Take corrective actions against store or KPI scores that don't meet desired thresholds.

Your administrator can propose additional questions, surveys, or tasks for you to complete when the store score or a KPI falls into yellow or red score range. If corrective actions are available, they appear along with insights.

> ℹ Note
>
> Completing corrective actions doesn't trigger recalculating the store score or KPIs.

7. Click *Save* and then *Close*.

As long as you haven't checked out the visit or marked it as completed, it's possible to resume perfect store execution, make changes, and rescore the visit. After rescoring the visit, you may see a different set of corrective actions depending on the score range that the new score falls into. Corrective actions that have been completed in the previous execution remain in the completed section.

For example, the first time you ran the perfect store visit, the store score fell in the red score range. You see Task 1 and Survey 1 as corrective actions to imporve store performance. You completed Task 1 and found a missing objective. You completed that objective and rescored the visit. This time the store score fell in yellow score range. You see Task 2 and Question 2 as corrective actions. In this case, Task 1 remains in the completed section whereas incompleted Survey 1 is no longer relevant and hence goes away.

> ❗ Restriction
>
> In the offline scenario, on the *Visit* page, under ▌▶ *Perfect Store Execution* ❯ *Insights* ▌, the following texts are not translated in the *Recommendation* section:
> - *Store Actions*
> - *KPI Actions*
> - *Completed*

> ℹ Note
>
> Once a perfect store visit is *Completed*, you can set its status back to *In Progress* and make changes to whatever is editable. However, perfect store execution remains read-only.

Perfect store scores are also available in the list view of visits for you to quickly get an idea about the health of a store. As a prerequisite, administrators must add the *Perfect Store Score* field via adaptation.

> ❗ Restriction
>
> Scores of perfect store visits created before August 2019 aren't displayed in color.

Add Objectives to Perfect Store Visits [page 741]
    The inclusion of perfect store objectives including the engagement map and points of engagement is crucial for a perfect store visit. In our solution, we support multiple functionalities to ensure that such objectives are determined prior to your perfect store execution.

Add Activity Plans to Perfect Store Visits [page 742]
    Just like any other regular visits, you can also assign standard tasks and surveys to perfect store visits using activity planner.

Create Follow-Up Sales Orders from Perfect Store Surveys [page 743]
    When creating follow-up sales orders in a perfect store visit, you can add products based on specific question responses that you selected in perfect store surveys. It allows you to take the next best action on low-performing metrics such as out-of-stock. This feature is currently available online only.

15.7.1 Add Objectives to Perfect Store Visits

The inclusion of perfect store objectives including the engagement map and points of engagement is crucial for a perfect store visit. In our solution, we support multiple functionalities to ensure that such objectives are determined prior to your perfect store execution.

- A background job that runs every 8 minutes generates objectives for new perfect store visits scheduled for current day and the next day.
- If you want to obtain objectives immediately after you create a perfect store visit, you can manually refresh the visit.
- Administrators can set up the solution to automatically refresh perfect store visits using workflow rules.

When a new engagement map or a new version is available, *Open* visits that contain an obsolete engagement map can be relinked to the latest engagement map that is active. Redetermination can happen under following circumstances.

- If you want your engagement map changes to be immediately reflected in the associated visit, you can manually refresh the visit.
- A nightly job picks up visits scheduled for current day and the next day, and updates associated engagement maps to the latest versions.
- If your administrator has created workflow rules for the solution to automatically refresh visits regularly, the engagement map is updated upon next refresh.

> → Tip
>
> To ensure that sales reps always obtain the most recent engagement map for perfect store execution, we recommend that you:
>
> - Make required changes at least two days ahead of the scheduled start time of the visit
> - Manually refresh the visit to accommodate any ad-hoc requests

Perfect store features are available offline. However, the determination of perfect store visit components can only be triggered online. Thus, to execute perfect store visits offline, you must acquire the objectives and applicable activity plans before you sync perfect store visits to offline.

Related Information

15.7.1.1 Configure Automatic Refresh for Perfect Store Visits

Administrators can define conditions in workflows to trigger a refresh of visits. These rules also apply to perfect store visits.

A refresh in a visit triggers the assignment of applicable activity plans that include a standard list of surveys and tasks. For perfect store visits, a refresh also triggers the determination of associated engagement maps, points of engagement, objectives, and so on.

Related Information

Configure Automatic Refresh for Visits [page 646]

15.7.2 Add Activity Plans to Perfect Store Visits

Just like any other regular visits, you can also assign standard tasks and surveys to perfect store visits using activity planner.

As a prerequisite, your administrator must enable this functionality for perfect store visits through a scoping question.

Tasks and surveys assigned via activity planner aren't considered for perfect store or KPI scoring. Sales representatives don't see standard tasks and surveys during perfect store execution. They can see and complete these tasks and surveys under the *Tasks* and *Surveys* tabs in the visit.

> ! Restriction
>
> For standard visits, administrators can Define a Time Window [page 656], which sets up the solution to generate surveys and tasks a certain number of days before the visit. This feature does NOT apply to perfect store visits.

Activity plans are determined along with perfect store objectives under following circumstances.

- A background job that runs every 8 minutes generates activity plans for new visits scheduled for current day and the next day.
- If you want to obtain activity plans immediately after you create a visit, you can manually refresh the visit.
- Administrators can set up the solution to automatically refresh visits using workflow rules.

Perfect store features are available offline. However, the determination of perfect store visit components can only be triggered online. Thus, to execute perfect store visits offline, you must acquire the objectives and applicable activity plans before you sync perfect store visits to offline.

Related Information

Add Objectives to Perfect Store Visits [page 741]

15.7.2.1 Configure Task and Survey Determination for Perfect Store Visits

Administrators can enable sales operations or account managers to assign standard tasks and surveys to perfect store visits using activity plans and routing rules. Such tasks and surveys are not considered for perfect store or KPI scoring.

Go to ▌▶ *Business Configuration* ▶ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Edit Project Scope* ▶ *Questions* ▶ *Industry Solution* ▶ *Consumer Product Extended* ▶ *Perfect Store Execution* ▌ to find the corresponding question about enabling standard worklist determination for perfect store visits.

Related Information

Add Surveys or Tasks to Visits [page 654]
Activity Planning and Routing [page 704]

15.7.2.2 Configure Automatic Refresh for Perfect Store Visits

Administrators can define conditions in workflows to trigger a refresh of visits. These rules also apply to perfect store visits.

A refresh in a visit triggers the assignment of applicable activity plans that include a standard list of surveys and tasks. For perfect store visits, a refresh also triggers the determination of associated engagement maps, points of engagement, objectives, and so on.

Related Information

Configure Automatic Refresh for Visits [page 646]

15.7.3 Create Follow-Up Sales Orders from Perfect Store Surveys

When creating follow-up sales orders in a perfect store visit, you can add products based on specific question responses that you selected in perfect store surveys. It allows you to take the next best action on low-performing metrics such as out-of-stock. This feature is currently available online only.

As a prerequisite, when designing the survey, administrators must go to *Follow Up Actions* and specify the question response or quantity proposal that triggers the creation of a sales order.
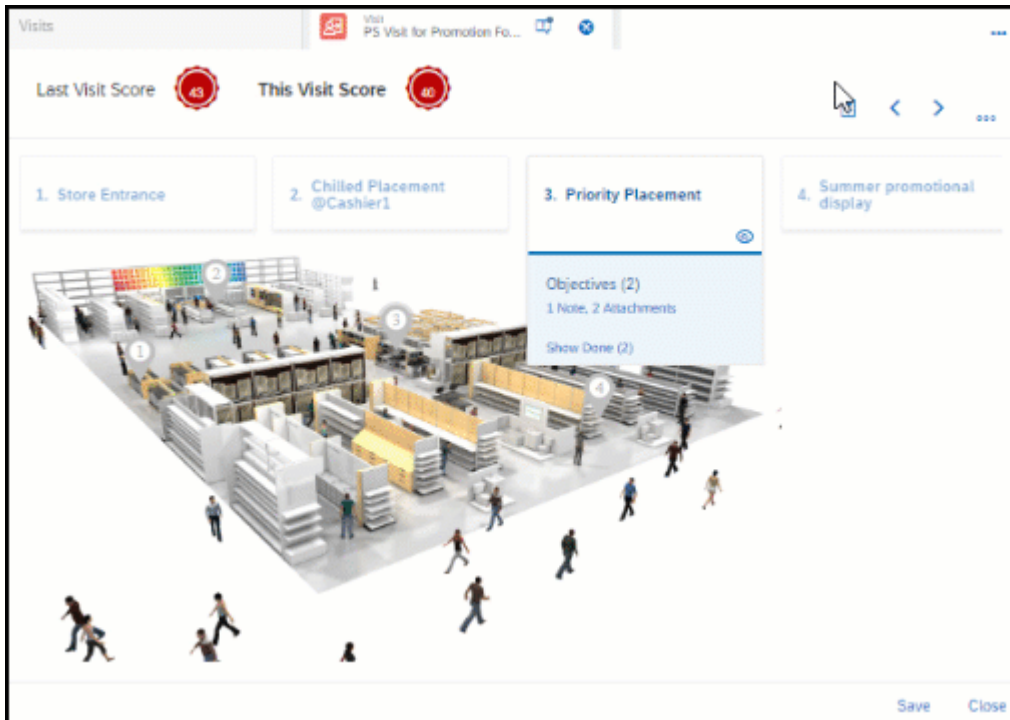
Related Information

Create a Sales Quote or Sales Order as A Follow-Up Item from a Survey [page 803]

15.8 Perfect Store Reporting

Following data sources and reports are available for perfect store reporting.

Perfect Store Data Sources

Data Source ID	Data Source Name	Description
CODPSPKPIU	Perfect Store Visits and KPIs	Contains perfect store scores, KPI scores, and KPI-related information.
CODPSPSURQUEVALU	Perfect Store Visits and Surveys	Contains perfect store scores, point of engagement scores, surveys, questions, and responses.
CODPSPTASKVALB	Perfect Store Tasks	Contains tasks assigned to points of engagement for perfect store execution.

Data Source ID	Data Source Name	Description
CODPSPCAU	Perfect Store Visits and Corrective Actions	Contains information on corrective actions taken during perfect store visits.

Perfect Store Reports

ID	Name	Description
CODPSPSURQUEVALU_Q0001	Perfect Store: Responses to survey and question at each point of engagement	Provides the survey and questions responses for a point of engagement in perfect store visits for all accounts.
CODPSPKPIU_Q0001	Perfect Store: Trend of store scores and KPI scores	Provides the trends of averages of store and KPI scores across all perfect store visits for all accounts.
CODPSPSURQUEVALU_Q0002	Perfect Store: Trend of store scores and point of engagement scores	Provides the trends of averages of store and PoE scores across all perfect store visits for all accounts.

Related Information

SAP Cloud for Customer Analytics Guide

15.9 Perfect Store Offline

You can execute perfect store visits, compute store scores and metrics when offline.

As prerequisites, administrators must go to ▮ *Administrator* 〉 *General Settings* 〉 *Offline Settings* 〉 *Data Download Rules* ◗ to set download rules for visits. Engagement map attachments, point of engagement attachments, and store layout images require additional download configuration under the *Attachment Download* tab.

> ! Restriction
>
> *Last Visit Score* and *KPI Details* aren't available offline.

In offline mode, you can mark a visit as a perfect store visit to allow seamless creation of follow-up visits and other offline actions. However, the determination of the assigned engagement map, points of engagement, objectives, as well as applicable activity plans, only happens after a sync with online.

After an engagement map is added to a visit, it's possible that your administrator creates a new version to make layout changes or modify KPI formulas. Or, your administrator may create and activate a new engagement map for the account. To cover such scenarios, when you sync offline visits to online, *Open* visits

that contain an obsolete engagement map are automatically relinked to the latest engagement map that is active. If you have enabled light sync, you must also toggle on these options in the offline settings as prerequisites.

- *Upload data*
- *Update downloaded data*
- *Download new data*

Redetermination only occurs if the visits haven't been started. For offline visits that are *In Progress* or *Completed*, they replace the ones online upon sync.

> **i Note**
>
> We recommend that you use the *Start Perfect Store Execution* option only once, either online or offline. If you use it more than than once, the system throws an error during synchronization.

Related Information

15.10 BAdI: Dynamic Custom Determination and Classification of Products

This BAdI provides you with the option to use custom logic for either determination or classification of products in surveys, or both.

The system determines the products and classifies them based on a combination of rules in the standard tables, and the custom logic that you provide in this BAdI.

If the standard table does not have rules specific for the products that you want to determine or classify, then the system reads the BAdI logic and adds them at the time of execution. If the rules are available both in the standard table and the custom logic, the system merges the two to classify the products.

The system triggers this BAdI during the following events:

- Survey assignment to the visit
- Visit refresh

In SAP Cloud Applications Studio, you can create an enhancement implementation with the following details:

- Namespace: `http://sap.com/xi/AP/FO/Activity/Global`
- Business object: `Questionnaire`
- Enhancement option: `ExitToDetermineAndClassifyProducts`

> **⚠ Caution**
>
> Using this enhancement implementation together with the standard rule may lead to performance issues.

15.11 Perfect Store FAQ

This section answers commonly asked questions about perfect store.

15.11.1 How are objectives (tasks and surveys) assigned to perfect store visits?

Tasks and surveys are assigned to points of engagement where the objectives need to be completed. Then, the points of engagement are assigned to an engagement map created per account. When a visit is created, the engagement map including its components is determined to the visit based on the account.

15.11.2 Can I use activity plans to assign tasks and surveys to perfect store visits?

Yes. Once administrators enable this feature, you can assign standard tasks and surveys to perfect store visits using activity plans. However, such tasks and surveys are not considered for perfect store or KPI scoring.

Sales representatives do not see standard tasks and surveys during perfect store execution. They can see and complete these tasks and surveys under the *Tasks* and *Surveys* tabs in a visit.

Related Information

Activity Planning and Routing [page 704]
Configure Task and Survey Determination for Perfect Store Visits [page 743]

15.11.3 How does objective/worklist determination work in perfect store visits vs. standard visits?

Below is a comparison table that shows you the functionalities supported for objective or worklist determination in perfect store visits and standard visits.

Functionalities Supported for Objective/Worklist Determination in Perfect Store Visits vs. Standard Visits

Functionality	Perfect Store Visits	Standard Visits
Automatic generation upon a background job that runs every 8 minutes	Yes	Yes

Functionality	Perfect Store Visits	Standard Visits
Manually refresh visits from the *Actions* menu	Yes	Yes
Automatically refresh visits using workflow rules	Yes	Yes
Automatic generation based on a time window defined in a fine-tuning activity	No	Yes
Engagement map redetermination upon a nightly job	Yes	No

Related Information

15.11.4 Is the perfect store solution available offline?

You can execute perfect store visits, compute store scores and metrics offline. However, as of now, creating perfect store components and visits in the offline mode is not possible.

> ! Restriction
>
> When you execute perfect store visits offline, *Last Visit Score* and *KPI Details* are not available.

As prerequisites for perfect store visit execution offline, administrators must go to ▶ *Administrator* ▶ *General Settings* ▶ *Offline Settings* ▶ *Data Download Rules* ▶ to set download rules for visits. Engagement map attachments, point of engagement attachments, and store layout images require extra download configuration under the *Attachment Download* tab.

15.11.5 Is the perfect store solution generally available?

The perfect store solution became generally available in February 2019.

15.11.6 Does the perfect store solution require a separate license?

No. The perfect store solution is provided as part of the SAP Cloud for Customer enterprise version.

16 Sales Acceleration

Sales Acceleration helps you boost business efficiency of your sales teams by increasing the volume and velocity of deals won, from anywhere, at any time, across any channel.

Sales Acceleration contains a set of features in SAP Cloud for Customer. The first business object that becomes generally available as of November 2020 is *Call Lists*.

Call lists focus on outbound sales engagement scenarios for inside sales reps, sales development reps, and their managers. The solution automates manual dialing tasks, streamlines communication, and allows you to easily capture customer engagement outcomes.

> **i Note**
>
> Sales Acceleration is available with the SAP Cloud for Customer Enterprise and Professional editions. No separate license is required.

16.1 Scope and Configure Sales Acceleration

Administrators can configure sales acceleration components using scoping and scoping questions.

16.1.1 Enable Call Lists

Before sales people can use call lists to communicate with customers, administrators must add the feature as well as the click-to-call functionality to the scope of the project.

Prerequisites

Activity Management and *Service Request Management* must be in the scope of the project.

Procedure

1. Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ❯, and enable the scoping question *Do you want to plan and execute call lists in your system?* under *Calling List*.

2. Under ▶ *Service* ❯ *Customer Care* ❯ *Service Request Management,* ◀ enable the scoping questions about Computer Telephony Integration (CTI) to use click-to-call in call lists.

3. Review your project scope and click *Finish*.

4. Go to ▶ *Administrator* ❯ *General Settings* ❯ *Business Roles,* ◀ and edit applicable business roles.

5. Under *Work Center and View Assignments*, enable the *Call Lists* work center (ID: *COD_CALLLIST_WCV*).

Next Steps

Define actions that a user can perform in the *Call Lists* work center by business role.

Related Information

16.1.2 Configure Access Restrictions for Call Lists by Role

As an administrator, when you assign the *Call Lists* work center to a business role, you must also define what actions this particular role is allowed to perform in the work center.

The table shows a list of call list actions that you can enable or disable for a business role under ▶ *Administrator* ❯ *General Settings* ❯ *Business Role* ❯ *Fields & Actions* ❯ *Business Action Restrictions* ◀. By default, all the actions are unrestricted.

Call List Actions

Name	Description
CALL_LIST_ADMINISTRATION	Create call lists
CALL_LIST_EXECUTION	Call participants on a call list
UNLOCK_PARTICIPANT	Unlock a participant that is in the *Locked* state
	i Note

When a sales rep initiates a call, the system locks the call to prevent another employee from calling the same participant at the same time. In the meantime, the *Live Activity Center* tab is launched for capturing call results.

However, if the sales rep exits *Live Activity Center* without saving call updates, the participant stays locked and must be unlocked manually. |

Name	Description
VIEW_COMPLETED	View call lists with an end date in the past
VIEW_INACTIVE	View call lists that haven't been activated
VIEW_UNASSIGNED	View call lists that aren't assigned to the logged-in user

16.1.3 Configure Internal Notifications of Call List Assignments

Administrators can set up the system to send out an internal notification to inform sales reps that they've been assigned to a call list.

Context

The procedure includes mandatory steps to set up an internal notification. You can define other optional fields based on your business requirements as needed.

Procedure

1. Go to ▎ *Administrator* ❯ *Workflow Rules* ❙, and click *New*.
2. Give a meaningful name in the *Description* field.
3. For *Business Object*, choose *Call List*.
4. Choose the *Timing* type. If the field is left blank, the rule is triggered on every save by default.
5. Click *Next* to define conditions as needed.

   > **⁂ Example**
   >
   > You can set up the system to trigger the rule when the call list is set to *Active*.
   > 1. Click *Add Group*.
   > 2. Under *Field*, choose *StatusCode*.
   > 3. Set the value to *Active*.
   > 4. Click *OK*.

6. Click *Next* to define actions.

   a. Under *Rule Type*, choose *Notification*.

   b. Enter the *Subject* of the notification.

   c. (Optional) Define and add placeholders to the subject.

      The values of the placeholders are dynamically populated when the notification is generated.

d. Identify recipients to whom the notification should be sent.

To add all the sales reps that are assigned to the call list, under *Recipient Determination*, click *Add Determination* and choose *Employee Responsible for Call List Execution*. You can add more employees by using other tables.

7. Click *Next* to review your workflow rule.

8. *Activate* the workflow rule.

9. Click *Finish*.

16.1.4 Configure E-Mail Notifications of Call List Assignments

Administrators can set up the system to send out an e-mail to notify sales reps that they've been assigned to a call list.

Prerequisites

You've enabled and maintained communication channels for both inbound and outbound e-mails. For more information, please see E-Mail Communication Channel.

Context

The procedure includes mandatory steps to set up an e-mail notification. You can define other optional fields based on your business requirements as needed.

Procedure

1. Go to ▮ *Administrator* ❯ *Workflow Rules* ▮, and click *New*.

2. Give a meaningful name in the *Description* field.

3. For *Business Object*, choose *Call List*.

4. Choose the *Timing* type. If the field is left blank, the rule is triggered on every save by default.

5. Click *Next* to define conditions as needed.

> ❖ Example
>
> You can set up the system to trigger the rule when the call list is set to *Active*.
> 1. Click *Add Group*.
> 2. Under *Field*, choose *StatusCode*.

> 3. Set the value to *Active*.
>
> 4. Click *OK*.

6. Click *Next* to define actions.

   a. Under *Rule Type*, choose *E-Mail*.

   b. Enter the *Subject* of the e-mail notification.

   c. Choose a template html file that contains content of the e-mail notification.

   d. (Optional) Define and add placeholders to the subject line and the html template.

      The values of the placeholders are dynamically populated when the notification is generated.

   e. Identify recipients to whom the e-mail notification should be sent.

      To add all the sales reps that are assigned to the call list, under *Recipient Determination*, click *Add Determination* and choose *Employee Responsible for Call List Execution*. You can add more employees by using other tables.

7. Click *Next* to review your workflow rule.

8. *Activate* the workflow rule.

9. Click *Finish*.

16.1.5 Configure Home Tile for Active Call Lists

Administrators can add a *My Active Call List* tile to the home dashboard. It allows sales reps and managers to see their five most recent active call lists, as well as how many participants on each call list are in an *Open* status directly from the homepage.

Procedure

1. On the homepage, click the pencil icon.

2. Choose *Adapt*.

3. Select the desired business role and click *Go*.

4. Click the icon to add a card.

5. Choose *Add Existing Card*.

6. Under *Tools*, toggle on *My Active Call List*.

7. Click *Save*.

8. Publish your changes.

16.1.6 Configure Disablement of Customer Hub

When a sales rep starts a call, by default, the *Customer Hub* tab pops up to provide more information about the participant. If this tab isn't needed for call list cases, you as an administrator can suppress it.

Go to ▶ *Administrator* 〉 *Service and Social* 〉 *Live Activity Configuration* 〉 and toggle off the *Open Customer Hub* option.

16.2 Call Lists

Call lists empower sales professionals to communicate effectively and efficiently with prospects and customers through the phone.

Sales managers can scale their outreach programs by creating call lists from their database of contacts, prospects, and leads. Sales reps can make calls directly from SAP Cloud for Customer with just one click.

We provide structured fields for sales reps to easily capture call results, which sales managers can use to quickly sort to identify participants that require a follow-up and monitor the call campaign status. It's also possible to customize call outcome fields to suit your specific business process.

In addition, a timeline view allows you to review call history of a call participant and track the campaign progress. Sales managers can also use the call list data source to generate reports and measure campaign success.

Create Call Lists [page 755]
> Sales managers can group a list of potential and existing customers into a call list, and assign the list to one or multiple employees for telesales campaigns.

Copy Call Lists [page 760]
> Sales managers can copy an existing call list, make modifications, and save the copy as a new call list.

Use Call Scripts [page 761]
> Use call scripts to ensure your sales reps stay on message and capture all the required data points when conversing with call list participants.

Check Call State [page 762]
> As a sales rep, before you make a call, you must check its call state in case your colleague has already taken up this call.

Capture Call Outcomes [page 762]
> While interacting with a customer on the call, sales reps can record key points that the customer has mentioned in *Live Activity Center*.

Create Follow-Up Order From Calls [page 765]
> While interacting with a customer on the call, sales reps can create a follow-up order in the *Live Activity Center*.

Monitor Call Progress [page 765]
> Stay on top of your campaign progress by fully utilizing the quick view of call lists, as well as the timeline view of each participant.

Call List Reporting [page 767]

Following data sources are available for you to report on call lists, track call metrics, and measure success of your call campaigns.

16.2.1 Create Call Lists

Sales managers can group a list of potential and existing customers into a call list, and assign the list to one or multiple employees for telesales campaigns.

Prerequisites

Ensure you've access to *Accounts*, *Contacts*, *Leads*, and *Employees* work centers to add those objects to a call list.

Procedure

1. Go to the *Call Lists* work center.
2. To create a call list, click the plus icon.
3. Choose your *Participant Type*.
   - *Business* type includes prospects, contacts, and leads.
   - *Consumer* type includes individual customers.
4. Enter a name and optionally a description.
5. Select *Start Date/Time* and *End Date/Time*.
6. Add participants to the call list, and click *Next*.

> **i Note**
>
> Call participants available for selection must meet following conditions.
>
> - Participants must have a record of phone or mobile number in the system.
> - Participants must not have objections to being contacted via phone for marketing or sales purposes, which you can check in the participant's detail view under *Marketing Permissions*.

> **→ Tip**
>
> Use advanced search to refine participants based on attributes. You can refine participants on a number of attributes like the First Name, Last Name, Phone Number, Job, Target Group, and so on. For example, you can include only those participants designated as primary contacts, and exclude participants that are currently on a call list. You can also search for a participant by function, for example, Head of Purchasing. You can also search for a participant by the target group of a marketing campaign.

> **! Restriction**
>
> You can't either restore a list filtered by a target group or create a custom query based on a target group in the advanced search filter.

7. Assign your sales team to the call list, and click *Next*.
8. (Optional) Add scripts to the call list, for sales reps to capture required data when they converse with participants, and click *Next*.

> **i Note**
>
> Call scripts utilize the survey object in SAP Cloud for Customer. Thus, as a prerequisite to creating and adding scripts to a call list, ensure you've access to the *Surveys* work center.

You can add one or multiple scripts that have been predefined in the *Surveys* work center. The solution doesn't prevent adding surveys that are still in preparation. Just make sure you activate all the associated surveys before sales reps make calls.

9. Review your entries. If the call list is ready for use, toggle on the *Active* button.

You can also choose to come back later to finalize your call list.

> **→ Tip**
>
> Upon activation, your sales team can be immediately informed of their call assignment via internal or e-mail notifications. As prerequisites, administrators must define workflow rules for automatic notifications.

10. Click *Save*.

Related Information

16.2.1.1 Enable Call Lists

Before sales people can use call lists to communicate with customers, administrators must add the feature as well as the click-to-call functionality to the scope of the project.

Prerequisites

Activity Management and *Service Request Management* must be in the scope of the project.

Procedure

1. Go to ▶ *Business Configuration* ▶ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *Account and Activity Management* ▶ *Activity Management* ▶, and enable the scoping question *Do you want to plan and execute call lists in your system?* under *Calling List*.

2. Under ▶ *Service* ▶ *Customer Care* ▶ *Service Request Management,* ▶ enable the scoping questions about Computer Telephony Integration (CTI) to use click-to-call in call lists.

3. Review your project scope and click *Finish*.

4. Go to ▶ *Administrator* ▶ *General Settings* ▶ *Business Roles,* ▶ and edit applicable business roles.

5. Under *Work Center and View Assignments*, enable the *Call Lists* work center (ID: *COD_CALLLIST_WCV*).

Next Steps

Define actions that a user can perform in the *Call Lists* work center by business role.

Related Information

16.2.1.2 Configure Access Restrictions for Call Lists by Role

As an administrator, when you assign the *Call Lists* work center to a business role, you must also define what actions this particular role is allowed to perform in the work center.

The table shows a list of call list actions that you can enable or disable for a business role under ▶ *Administrator* ▶ *General Settings* ▶ *Business Role* ▶ *Fields & Actions* ▶ *Business Action Restrictions* ▶. By default, all the actions are unrestricted.

Call List Actions

Name	Description
CALL_LIST_ADMINISTRATION	Create call lists
CALL_LIST_EXECUTION	Call participants on a call list

Name	Description
UNLOCK_PARTICIPANT	Unlock a participant that is in the *Locked* state

> **i Note**
>
> When a sales rep initiates a call, the system locks the call to prevent another employee from calling the same participant at the same time. In the meantime, the *Live Activity Center* tab is launched for capturing call results.
>
> However, if the sales rep exits *Live Activity Center* without saving call updates, the participant stays locked and must be unlocked manually.

Name	Description
VIEW_COMPLETED	View call lists with an end date in the past
VIEW_INACTIVE	View call lists that haven't been activated
VIEW_UNASSIGNED	View call lists that aren't assigned to the logged-in user

16.2.1.3 Configure Internal Notifications of Call List Assignments

Administrators can set up the system to send out an internal notification to inform sales reps that they've been assigned to a call list.

Context

The procedure includes mandatory steps to set up an internal notification. You can define other optional fields based on your business requirements as needed.

Procedure

1. Go to ▌ *Administrator* ❯ *Workflow Rules* ▐, and click *New*.
2. Give a meaningful name in the *Description* field.
3. For *Business Object*, choose *Call List*.
4. Choose the *Timing* type. If the field is left blank, the rule is triggered on every save by default.
5. Click *Next* to define conditions as needed.

> ⸙ Example
>
> You can set up the system to trigger the rule when the call list is set to *Active*.
> 1. Click *Add Group*.
> 2. Under *Field*, choose *StatusCode*.
> 3. Set the value to *Active*.
> 4. Click *OK*.

6. Click *Next* to define actions.

    a. Under *Rule Type*, choose *Notification*.

    b. Enter the *Subject* of the notification.

    c. (Optional) Define and add placeholders to the subject.

    The values of the placeholders are dynamically populated when the notification is generated.

    d. Identify recipients to whom the notification should be sent.

    To add all the sales reps that are assigned to the call list, under *Recipient Determination*, click *Add Determination* and choose *Employee Responsible for Call List Execution*. You can add more employees by using other tables.

7. Click *Next* to review your workflow rule.

8. *Activate* the workflow rule.

9. Click *Finish*.

16.2.1.4 Configure E-Mail Notifications of Call List Assignments

Administrators can set up the system to send out an e-mail to notify sales reps that they've been assigned to a call list.

Prerequisites

You've enabled and maintained communication channels for both inbound and outbound e-mails. For more information, please see E-Mail Communication Channel.

Context

The procedure includes mandatory steps to set up an e-mail notification. You can define other optional fields based on your business requirements as needed.

Procedure

1. Go to ▌ *Administrator* ❯ *Workflow Rules* ▐, and click *New*.
2. Give a meaningful name in the *Description* field.
3. For *Business Object*, choose *Call List*.
4. Choose the *Timing* type. If the field is left blank, the rule is triggered on every save by default.
5. Click *Next* to define conditions as needed.

> ⁜ Example
>
> You can set up the system to trigger the rule when the call list is set to *Active*.
> 1. Click *Add Group*.
> 2. Under *Field*, choose *StatusCode*.
> 3. Set the value to *Active*.
> 4. Click *OK*.

6. Click *Next* to define actions.
   a. Under *Rule Type*, choose *E-Mail*.
   b. Enter the *Subject* of the e-mail notification.
   c. Choose a template html file that contains content of the e-mail notification.
   d. (Optional) Define and add placeholders to the subject line and the html template.

   The values of the placeholders are dynamically populated when the notification is generated.
   e. Identify recipients to whom the e-mail notification should be sent.

   To add all the sales reps that are assigned to the call list, under *Recipient Determination*, click *Add Determination* and choose *Employee Responsible for Call List Execution*. You can add more employees by using other tables.
7. Click *Next* to review your workflow rule.
8. *Activate* the workflow rule.
9. Click *Finish*.

16.2.2 Copy Call Lists

Sales managers can copy an existing call list, make modifications, and save the copy as a new call list.

Procedure

1. Copy a call list from the list view or in the detail view of the source call list.
   ○ From the list view of call lists:
      1. Select the call list that you want to copy.
      2. From *More* options, click *Copy*.

- In the detail view of the call list that you want to copy:

  1. Click ▌ *Actions* ❯ *Copy* ▐.

  A new call list opens with most information copied over, except *End Date/Time*.

2. Proceed through tabs and edit settings as required to create the call list.

3. Review your entries and click *Save*.

4. When the call list is ready for use, activate the call list.

Related Information

16.2.3 Use Call Scripts

Use call scripts to ensure your sales reps stay on message and capture all the required data points when conversing with call list participants.

Call scripts are surveys that are populated with call-related dialogues and questions. A call list can contain multiple call scripts. Sales reps can use scripts as a guidance and deal with different situations on the call, for example, ice breaker, price negotiation, objection handling. A call script can also be reused in multiple call lists.

> **i Note**
>
> Call scripts utilize the survey object in SAP Cloud for Customer. Thus, as a prerequisite to create and add call scripts to a call list, ensure you've access to the *Surveys* work center.

During a call, the sales rep can read from the call script, ask questions, capture survey responses, and submit the responses to save these them. The saved responses can then be viewed by a sales manager to monitor the call progress and also can be reviewed by either a sales manager or the sales rep using the participant timeline option.

You can further create reports to review the survey responses, captured in the call script, across all participants.

Related Information

16.2.4 Check Call State

As a sales rep, before you make a call, you must check its call state in case your colleague has already taken up this call.

The solution provides three standard call states.

- *Ready*: You can call any participant that is in a ready state.
- *Locked*: The call is locked if a sales rep is currently running the call.

> → Remember
>
> When you initiate a call, the *Live Activity Center* is launched for you to capture the call outcome. You must save your call updates before you exit *Live Activity Center*. Otherwise, the call remains locked.
>
> If you are not able to unlock the participant, contact your administrator.

- *Closed*: Once a sales rep changes the call status to *Closed*, the system automatically updates the call state accordingly. It indicates that a final call result is captured and no follow-up is needed.

16.2.5 Capture Call Outcomes

While interacting with a customer on the call, sales reps can record key points that the customer has mentioned in *Live Activity Center*.

Procedure

1. Go to a call list that has been assigned to you.
2. Navigate to the *Participants* tab.

   > i Note
   >
   > In case that the *Overview* tab is available to you, you can get a glimpse of participants and assigned sales team on one screen. However, the participants are view-only under *Overview*. To call a participant, you must go to the *Participants* tab.

   > → Tip
   >
   > Before calling, refresh the *Participants* table to view the latest call state, as well as to ensure that you still have the marketing permission for each participant. For participants who change their marketing permissions after being added to a call list, their phone numbers are disabled for calling.

3. Choose a participant that is in a *Ready* state.
4. Click the associated phone number to call.

   The *Live Activity Center* tab appears for you to record call outcomes.
5. Under *Live Activity Center*, take notes, update call status, and capture the call result.

If your administrator has added scripts to your call list, you can choose the desired script to obtain required data during the call. Call scripts utilize the survey object in SAP Cloud for Customer.

If the participant requires a follow-up, leave the call in the *Open* status and specify a date to call back. If there are no further actions required for this participant, change the call status to *Closed*.

> → Tip
>
> To better meet your business needs, your administrator can add custom fields to *Live Activity Center*. Such fields can also be displayed and edited in the *Participants* table.
>
> As a prerequisite, ensure administrators are enabled to call to access and adapt *Live Activity Center*.

6. Click *Save*.

> ⚠ Caution
>
> The call stays locked if you exit the *Live Activity Center* without saving your call updates. If you can't unlock the participant, contact your administrator.

Related Information

Surveys [page 769]

16.2.5.1 Enable Call Lists

Before sales people can use call lists to communicate with customers, administrators must add the feature as well as the click-to-call functionality to the scope of the project.

Prerequisites

Activity Management and *Service Request Management* must be in the scope of the project.

Procedure

1. Go to ▐▶ *Business Configuration* ❯ *Implementation Projects* ❚. Select your project and navigate to ▐▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ❚, and enable the scoping question *Do you want to plan and execute call lists in your system?* under *Calling List*.

2. Under ▐▶ *Service* ❯ *Customer Care* ❯ *Service Request Management,* ❚ enable the scoping questions about Computer Telephony Integration (CTI) to use click-to-call in call lists.

3. Review your project scope and click *Finish*.

4. Go to ▶ *Administrator* ❯ *General Settings* ❯ *Business Roles,* ▶ and edit applicable business roles.

5. Under *Work Center and View Assignments*, enable the *Call Lists* work center (ID: *COD_CALLLIST_WCV*).

Next Steps

Define actions that a user can perform in the *Call Lists* work center by business role.

Related Information

16.2.5.2 Configure Access Restrictions for Call Lists by Role

As an administrator, when you assign the *Call Lists* work center to a business role, you must also define what actions this particular role is allowed to perform in the work center.

The table shows a list of call list actions that you can enable or disable for a business role under
▶ *Administrator* ❯ *General Settings* ❯ *Business Role* ❯ *Fields & Actions* ❯ *Business Action Restrictions* ▶. By default, all the actions are unrestricted.

Call List Actions

Name	Description
CALL_LIST_ADMINISTRATION	Create call lists
CALL_LIST_EXECUTION	Call participants on a call list
UNLOCK_PARTICIPANT	Unlock a participant that is in the *Locked* state
	i Note When a sales rep initiates a call, the system locks the call to prevent another employee from calling the same participant at the same time. In the meantime, the *Live Activity Center* tab is launched for capturing call results. However, if the sales rep exits *Live Activity Center* without saving call updates, the participant stays locked and must be unlocked manually.
VIEW_COMPLETED	View call lists with an end date in the past

Name	Description
VIEW_INACTIVE	View call lists that haven't been activated
VIEW_UNASSIGNED	View call lists that aren't assigned to the logged-in user

16.2.5.3 Configure Disablement of Customer Hub

When a sales rep starts a call, by default, the *Customer Hub* tab pops up to provide more information about the participant. If this tab isn't needed for call list cases, you as an administrator can suppress it.

Go to ▮▶ *Administrator* 〉 *Service and Social* 〉 *Live Activity Configuration* ▮ and toggle off the *Open Customer Hub* option.

16.2.6 Create Follow-Up Order From Calls

While interacting with a customer on the call, sales reps can create a follow-up order in the *Live Activity Center*.

While on a call with the customers, sales reps can create a follow-up order by clicking the *Create Order* button within in the *Live Activity Center*.

In the participants table, click *Last Call Date* to launch the timeline view. If an order is created, an order icon is displayed next to that particular call. Click the icon to view order details.

16.2.7 Monitor Call Progress

Stay on top of your campaign progress by fully utilizing the quick view of call lists, as well as the timeline view of each participant.

Use Call List Quick View

> i Note
>
> As a prerequisite, administrators must go to ▮▶ *Settings* 〉 *Company Settings* 〉 *General* ▮ and toggle on the *Enable New Quick View* option.

You can track the progress of each call list directly from the list view. Click the name of a call list to launch its quick view. Here, you can see basic information of this call list and its completion status in percentage. Color highlights are applied to attributes *Closed Status* and *End Date*, which enables you to know at a glance the health of your calling efforts as you approach the specified end date.

The color of closed status changes from red to orange to green as the number of call participants with a closed status approaches 100%. The *Closed Status* column is also available in the list view. Just note that you can't sort call lists by closed status as it's a calculated value.

Color Codes for Closed Status

Color Code	Percentage of Participant in a Closed State
Red	Less than or equal to 33%
Orange	Between 34% and 66%
Green	Greater than or equal to 67%

The color of end date changes from green to orange to red as the current date approaches the specified end date.

Color Codes for End Date

Color Code	As Compared with the Current Date
Green	In first third (1/3) of time between start date and end date
Orange	In second third (2/3) of time between start date and end date
Red	In the final third (3/3) of time between start date and end date

Navigate to the *Participants* tab within the quick view to see call status of each participant. You can also call or e-mail participants directly from the quick view.

> **i Note**
>
> Users must have proper administrative permissions to edit call list details or make calls to participants in the quick view.
>
> If a particular phone icon isn't clickable, it's likely that the call participant is locked. You must have the corresponding authorization to unlock participants.
>
> For more details, please see Configure Access Restrictions for Call Lists by Role.

Use Call List Timeline View

In the detail view of a call list, the *Participants* table displays the most recent call results captured about your customers.

To quickly get up to speed on call history of a particular participant, especially prior to a callback, click *Last Call Date* to open a quick view. Here, you can see a chronological list of all the past call records about the participant. If a script is used during the call, you can click the script icon next to the call to view the participant's survey responses.

16.2.8 Call List Reporting

Following data sources are available for you to report on call lists, track call metrics, and measure success of your call campaigns.

Call List Data Sources

Data Source ID	Data Source Name	Description
CODCALLLIST	Call List	Contains all calling lists

Data Source ID	Data Source Name	Description
COD_CALL_LIST_SVYRES	Call List Script Answers	Contains all calling lists including answers given within call scripts

17 Surveys

Surveys are an integral feature in retail execution and service scenarios in SAP Cloud for Customer. You can design surveys that sales representatives will use to capture business related data at customer locations. The information captured in the surveys offers you an insightful direction for your next set of business actions. The survey offering includes comprehensive survey design, execution as well as reporting capabilities.

From a usage perspective, surveys in SAP Cloud for Customer can be broadly categorized as internal and external surveys.

- **Internal Surveys**: The internal surveys are used at customer locations to capture the necessary information regarding sales, product display and so on. Note that internal surveys can be consumed only if they are assigned to a business object such as visit, service ticket, lead, opportunity and so on.
- **External Surveys**: The external surveys on the other hand are filled by the customers and are typically used to capture the satisfaction quotient of a target group audience or customers.

Flexibility
- Branching Logic, Question & Answer Types, Mass Answers
- Dynamic Determination for Products
- Activity Planner and Routing Rules to propose Right Surveys
- Simulate Surveys

Seamless Integration
- Read and write back Data from SAP & Third-Party Systems
- Offline Usage

Reusability
- Question Bank
- Mass answers and Pre-population of Answers
- Survey Pdf Summary

Real-Time Reporting
- Data Sources
- Standard Reports
- Scores
- Others

17.1 Scope and Configure Surveys

Administrators can configure surveys using scoping, scoping questions, and fine-tuning activities.

Scoping questions and fine-tuning activities that are straightforward may not be included in this list.

17.1.1 Enable Surveys

Administrators can add *Surveys* to your project scope.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ▶ and check the box next to the scoping question for using surveys.

17.1.2 Configure Survey Categories

Administrators can configure survey categories in fine-tuning activities to meet your business needs.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ▶. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Surveys* ❯ *Maintain Survey Categories* ▶ to edit your categories.

17.1.3 Configure Survey Question Categories

Administrators can add and delete question categories in fine-tuning activities.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ▶. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Surveys* ❯ *Maintain Question Categories* ▶ to edit your categories.

17.1.4 Configure Survey Answer Categories

Administrators can configure answer categories for surveys in fine-tuning activities.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ▶. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Surveys* ❯ *Maintain Answer Categories* ▶ to edit your categories.

17.1.5 Configure Product Determination Rules for Surveys

Administrators can create rules for the system to dynamically assign products or product lists to a survey at runtime.

Context

This rule framework allows you to define both product determination and classification.

> **! Restriction**
>
> Products and product lists cannot be maintained together in a single rule.

Procedure

1. Go to ▶ *Administrator* 〉 *Sales and Campaign Settings* 〉 *Define Rules for Survey Product Determination* 〉 to launch the rules table.

2. If it is your first time to create rules, use *Adapt Columns* to set up the rules table. You can have up to 20 columns in the table, including last three result columns, *Product*, *Product List ID*, and *Classification*.

   > **→ Tip**
   >
   > We recommend that you remove any unwanted columns and only keep required ones as extra columns can impact system performance.

3. Choose *Insert Row* above the rules table. A new row with an asterisk in each field is added to the table.

   You can add values to more than one field in a row. The fields in one row evaluate as a logical **AND** relationship, which means the field values must all evaluate to true in order for the rule to evaluate to true.

4. Click the asterisk symbol in a cell to enter a value for that field. The rules table offers a variety of logical operators to define your values.

5. Continue to add rows for each desired result.

   The rows in the rules table evaluate as a logical **OR** relationship. The system compares each rule from top to bottom until it finds one match, which suggests that the most specific rule should be placed at the top of the table and generic ones should be near the bottom.

   You can rearrange rows by selecting the row and clicking *Swap*.

6. Click *Save* when you finish.

7. Click *Activate Rules*.

   For your updated rules, unless you reactivate them, otherwise the previous rule sets continue to execute.

17.1.6 Configure Add Products from Past Orders in SAP Cloud for Customer, Extended Edition

Administrators can enable this SAP Cloud for Customer, Extended Edition feature by selecting a scoping question.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* 〉. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Sales* 〉 *Account and Activity Management* 〉 *Activity Management* 〉 *Surveys* 〉 to find the corresponding scoping question.

17.1.7 Configure Icons for Product Classification

Administrators can assign icons for product classification in fine-tuning activities.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ▶. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Surveys* ❯ *Maintain Product Classification for Survey* ▶ to assign a product classification icon for surveys.

> **i Note**
>
> - Only a limited set of icons are available.
> - A default classification icon is provided for classifications which do not have any icons maintained.

17.1.8 Configure Surveys in SAP Cloud for Customer, Extended Edition

Administrators can configure survey options in SAP Cloud for Customer, Extended Edition.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ❯ *Surveys* ▶ to view the scoping questions for Surveys in Extended Edition.

You can choose to display the product image, ID, or description, and to allow products from past orders to be added in SAP Cloud for Customer, Extended Edition.

17.1.9 oData and Web Services for Surveys

Administrators can integrate this feature by using oData and web services.

To learn more about oData and web services, go to the SAP Cloud for Customer Help Center and under the Integration section, view the SAP Cloud for Customer OData API and the Web Service API documentation.

17.2 Survey Types

Use different types of surveys to accomplish your various goals.

General (Checklist) Surveys [page 773]
> General surveys, also known as checklist surveys, contain a collection of questions in a list format.

Product Surveys [page 774]
> Use product surveys to collect data about products.

Competitor Product Surveys [page 774]

Capture information about your competitor's products in a competitor product surveys.

Create a survey based on the registered products for a specific account.

Evaluate competitor performance.

Collect feedback from your customers with a satisfaction survey.

Define survey categories based on survey types for your reporting needs.

17.2.1 General (Checklist) Surveys

General surveys, also known as checklist surveys, contain a collection of questions in a list format.
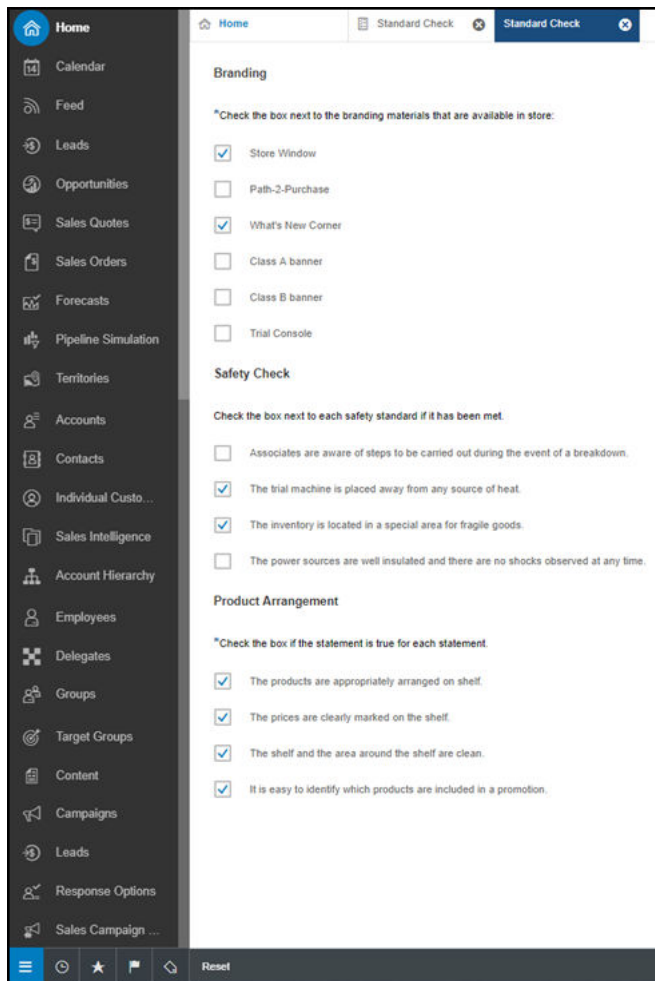
17.2.2 Product Surveys
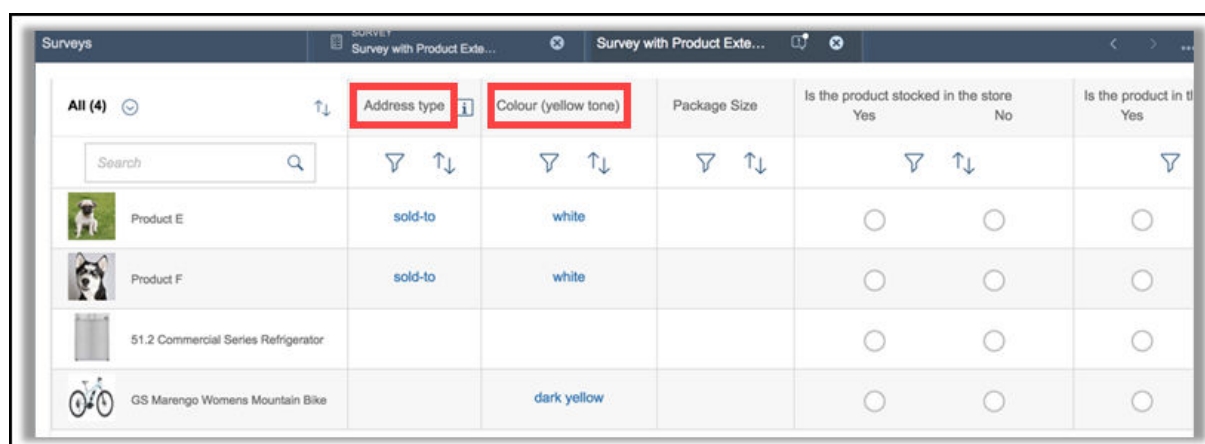
Use product surveys to collect data about products.

Create a product survey to answer the same set of questions for multiple products. You can add individual *Products*, products from a *Product List*, and products from a *Product List Category* to a *Product Survey*. These products can be added during design time as well as runtime.

You can dynamically add products from product lists based on a product list category. For example, if you set a product list category for Seasonal Sales in the survey, and create a product list called Summer Products assigned to this product list category, then the Summer Products product list will automatically be added to the survey if its valid for the account being visited.

You can search for products using extension fields. First, create extension fields for products, then add the extension fields as questions in the survey.

In the following example, *Address type* and *Colour* are extension fields.

Product Surveys are available in list view and matrix view.

Related Information

Complete Product Surveys [page 814]

17.2.3 Competitor Product Surveys

Capture information about your competitor's products in a competitor product surveys.

Create your own criteria to audit your competitors' products in store. For example, you may want to check availability, prices, or promotions for your competitor's product to see how your products compare. Competitor product surveys are created like a regular product survey, but with competitor products instead.

Related Information

https://help.sap.com/viewer/24765b551a014b779b95c7b07d8e9079/latest/en-US/
1143cc7fad7348089f0cbf8f918456ff.html

17.2.4 Registered Product Surveys

Create a survey based on the registered products for a specific account.

To collect information regarding products that have been installed at a specific account, use a registered product survey.

Create a registered product survey like regular product survey, but without adding products to it. Instead, when you assign a survey to a visit, it automatically includes the registered products that have been set for the assigned account.

Related Information

Product Surveys [page 774]
Visits [page 638]

17.2.4.1 Registered Products Based on Involved Parties for Visits in Surveys

All registered products for all involved parties are included in registered product surveys.

When you assign a registered product survey to a visit, all registered products for the account being visited are automatically populated in the survey. This includes all registered products where the account being visited is listed as an involved party, regardless of the role assigned. Previously, only registered products with the visit account assigned the role of customer would have been considered and populated in the survey.

17.2.4.2 Search for Registered Products Using Serial ID, Description, and Extension Fields

Use the serial ID, description, and extension fields of registered products instead of the product ID to search for registered products in surveys.

Create extension fields for registered products, then add the extension fields as questions in the survey.

In the following example, *Market Category* is an extension field.

17.2.4.3 Define a Product and Product Category for Registered Product Surveys

When designing a registered product survey, define a product or product category for your registered products. During runtime, the system displays registered products based on these requirements.

17.2.5 Competitor Surveys

Evaluate competitor performance.

Gain insight about your competitors with competitor surveys. Measure performance across multiple categories and compare these results to your own. Use this data to improve your performance and stay ahead of your competition.

Competitor surveys collect data about the competitors related to an opportunity. If you add a competitor survey to an opportunity, the competitors listed in the opportunity will be added to the survey by default. If you'd like to add additional competitors to a survey, you can do so when designing the survey.

17.2.6 Satisfaction Surveys

Collect feedback from your customers with a satisfaction survey.

Context

Create satisfaction surveys that you can send out to your customers using an e-mail template. Your customers can rate how satisfied they are with several answer options based on a scale you create. You can also use all other question types in satisfaction surveys to collect more details about your customers.

After users complete a satisfaction survey, they receive a message signifying that they have completed the survey and thanking them for their participation. You can configure this message for each of your satisfaction surveys to meet your brand and business needs.

> **i Note**
>
> Satisfaction surveys aren't available on the iPad and are therefore also not available for offline usage.

Procedure

1. Add a new survey, choose the *Satisfaction* category and fill in the basic information.
2. Add satisfaction questions by selecting *Customer Satisfaction* under *Question Category* and use *Multiple Choice (select one)* questions to set your scale. Here, you could choose to use numerical values and give a rating scale in your short descriptions or use the answer options to describe satisfaction.
3. Add other additional question types if you'd like to collect other data in your survey.
4. Under *Survey End Message*, format and enter the message you'd like your participants to receive upon completion.
5. Select *Save*.

17.2.7 Survey Categories

Define survey categories based on survey types for your reporting needs.

Survey categories are different from survey types. Survey types are predefined survey formats whereas survey categories are classification names created by your administrator. Survey categories define each survey type further by giving them custom names. Create reports based on these categories to gather data in a larger business context.

Example

You can create one survey category for Seasonal Products, one for Standard Products, and one for Promotional Products. All categories will have the product survey type, but will belong to different survey categories. You can apply these categories for many different surveys you create and then create reports based on each category to evaluate performance in each category.

17.2.7.1 Configure Survey Categories

Administrators can configure survey categories in fine-tuning activities to meet your business needs.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Surveys* ❯ *Maintain Survey Categories* ❯ to edit your categories.

17.3 Design Surveys

Design your survey questions, layouts, and other options to create a unique output.

Survey Statuses [page 780]
  Survey statuses are important to keep in mind when designing surveys because they define what actions are available for users.

Survey Questions [page 780]
  Configure your surveys with different types of questions and reporting features.

Survey Question Bank [page 787]
  Store survey questions for easy reuse in multiple surveys.

Copy Previous Answers [page 787]
  Automatically populate answers from a past visit in a survey.

Matrix View for Surveys [page 788]
  Simplify the layout of your product survey questions, and answer all questions for all products quickly.

Pagination in Matrix Surveys [page 788]
  Design your survey layout to distribute product questions in different pages.

17.3.1 Survey Statuses

Survey statuses are important to keep in mind when designing surveys because they define what actions are available for users.

Once you start creating a survey, you'll need to pay attention to its status.

Set the survey status from the *Actions* menu.

- *In Preparation* (initial status): In this status you can add, change or delete questions and answers. Surveys with status *In Preparation* cannot be assigned to an activity plan or a visit.
  From *In Preparation* you can switch to *Active*.
- *Active*: Indicates that the survey is ready to be used. You can use the survey for activity plans and store visits. If a survey is active you can't change, add or delete questions from it, but you can edit the attachements, products, categories, and score values.
  From *Active* you can switch to *In Preparation* and *Obsolete*.
- *Obsolete*: The survey can no longer be assigned to new visits or activity plans. If the survey is already used for open, or in process store visits, the survey can still be completed during the visit.
  From *Obsolete* you can switch to *In Preparation* and *Active*.

> i Note
>
> You can switch from *Obsolete* and *Active* to *In Preparation* only when there are no answers available for this survey.

17.3.2 Survey Questions

Configure your surveys with different types of questions and reporting features.

17.3.2.1 Survey Question Types

Use *Question Types* to specify the format of the answer options.

The following *Question Types* are offered:

- *Amount* - Enter a value in a specific currency. Validations are performed against the lower or upper limits you have set.
- *Date* - Use the calendar button to enter a date in a supported date format.
- *Date Range* - Use the calendar button to choose start and end dates.
- *Matrix* - Gather more details at once using a matrix of rows and columns. Only available in the SAP Fiori Client.
- *Multiple Choice (select multiple)* - Choose one or more predefined answer options.
- *Multiple Choice (select one)* - Choose only one predefined answer option.
- *Numeric Value* - Capture numeric (integer) responses and can be included without specifying the unit of measurement or the currency as a mandatory field.
- *Quantity* - Enter a value for a specific unit of measure.
- *Registered Product Extension Fields* - Add an extension field for the registered product of interest, and then add the extension field as a question in the survey.
- *Section* - Create a section to organize and structure your surveys. This question type is not a question with answer options, but allows you to add headings and enter blocks of text that provide more information and organization for survey respondents.
- *Signature* - Ask for a signature upon completion of a survey.
- *Text* - Use the text field to enter any additional information you may want to give your survey respondents. You can configure the text box size while designing the external survey. You can select either small, medium, or large size text box. The default size is set to medium.

17.3.2.2 Signatures in Surveys

Ask for a sign-off upon completion of surveys.

You can capture a signature in a survey when you submit a survey. On signature capture, the survey status is set to *Completed* and can no longer be modified. You can view the signature at the end of the survey summary PDF.

Add a signature question to your survey when designing it. You can use the *Mandatory* flag to require a signature for completion.

> i Note
>
> Currently, only one signature question type is allowed for a single survey.

This feature is valid only for:

- SAP Cloud for Customer, Extended Edition - In the HTML5 edition, you can still capture a signature but the survey status will not be set to *Completed*.
- Internal surveys - This feature is not supported for external or satisfaction surveys.

You can view the *Signed Status* for a survey. The following statuses are set by the system:

- *Signed* – Indicates that the signature has been added.
- *Not Signed* – Indicates that the signature has not been added. This status also indicates that signature is optional for the survey.
- *Blank* – Indicates that the signature is not required for the survey.

17.3.2.3 Hide Questions in Surveys

During runtime of a survey, you can hide questions.

In the design screen set the *Hide Question* toggle button to *Yes*.

Note that only calculated fields and extension field questions can be hidden.

17.3.2.4 Survey Page Breaks

Use page breaks to group questions by page.

For all default question types in a survey, you have the option to place the question on a new page within your survey. Use the page break checkbox when designing your question. The question that has the box checked and all following questions are shown on a new page.

17.3.2.5 Incremental Numeric Boxes

Incremental numeric boxes are available for amount, quantity, and numeric type of questions.

Based on the number you define in the *Increase/Decrease By* field, during runtime, the value of the field is changed on each click.

Note that if derivation method is enabled for these types of questions, then the feature is not applicable. When you select an option in the *Derivation Method* field, the system hides the *Increase/Decrease By* field.

> **i Note**
>
> The feature is only available in Fiori Client.
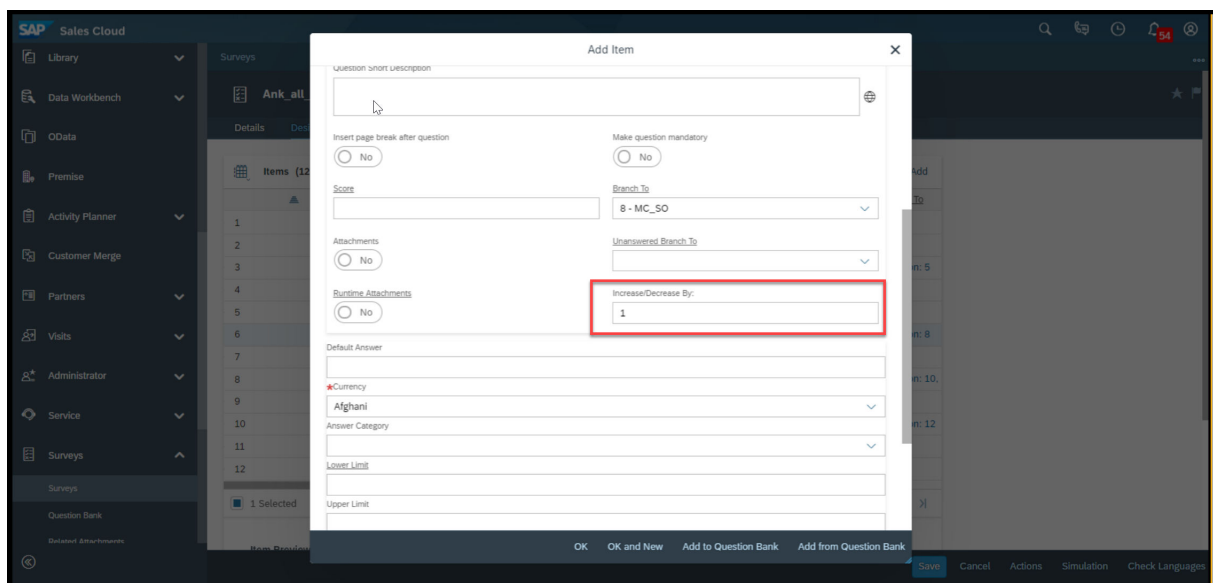
17.3.2.6 Attachments for Survey Questions

Add attachments to display in your surveys, and allow participants to attach files when completing surveys.

You can add attachments to individual questions at design time in the survey by setting the flag for *Attachments*. Add attachments to surveys using one of the following options: Local file, Web link, and Library. You can add PPTs, PDFs, JPGs, PNGs, and URLs as attachments.

> → Recommendation
>
> For performance reasons, we recommend attaching a maximum of one large picture, 10 medium pictures, or 30 small pictures per survey.

Use the *Planogram Attachment Category* to attach account-level attachments. Select the *Attachment Type Category* you'd like to add, and then, during runtime, the attachments relevant for the account and category will be available to view.

If you want participants to be able to add attachments to questions when they are completing a survey, set the flag for *Runtime Attachments* at the question level.

> **i** Note
>
> For matrix surveys, you cannot add attachments at the question level. You can only add attachments at the product level in matrix surveys.

17.3.2.7 Survey Question Categories

Define question categories that can be used in reporting.

When creating survey questions, you can assign a *Question Category* to help classify the question in a larger business context. You can then create reports based on a specific question category.

17.3.2.8 Configure Survey Question Categories

Administrators can add and delete question categories in fine-tuning activities.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* ▶. Select your project and navigate to ▶ *Open Activity List* 〉 *Fine-Tune* 〉 *Surveys* 〉 *Maintain Question Categories* ▶ to edit your categories.

17.3.2.9 Survey Answers

Choose the format for the answers to your multiple choice survey questions.

The format for your multiple choice survey answer fields depends on the type of question. Some question types allow you to choose an answer format. The following options are available:

- Toggle
- Radio Button
- Dropdown List
- Checkbox

17.3.2.10 Survey Answer Categories

Define answer categories that can be used in survey reporting.

When creating answers for your survey questions, you can add them to an *Answer Category* to help describe the meaning of the answer in a larger business context. You can then create reports based on a specific answer category.

Example

If you have a question that asks users to rate their experience on a scale from 1 to 5 with 1 being very dissatisfied and 5 being very satisfied, you can apply the category negative to answers 1 and 2, neutral to answer 3, and positive to answers 4 and 5. These same categories can be applied to other answers, and then you can run a report based on answers that were positive, neutral, and negative. You can collect this data for a particular survey or account to view your results on a broader or more focused scale.

17.3.2.11 Configure Survey Answer Categories

Administrators can configure answer categories for surveys in fine-tuning activities.

Go to ▌ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▌ *Open Activity List* ❯ *Fine-Tune* ❯ *Surveys* ❯ *Maintain Answer Categories* ▐ to edit your categories.

17.3.2.12 Default Survey Answers

Set a default answer for multiple choice, amount, quantity, and text questions.

Choose a default answer to show during runtime for your survey questions when you design each question.

- For multiple choice, set the *Default Answer* flag next to the answer you want to set as default.
- For date questions, use the calendar next to *Default Answer* to select a default date.
- For amount, quantity, and text questions, enter a value in the *Default Answer* field.

17.3.2.13 Calculated Fields on Surveys

Answers to a question can be populated based on the answers provided to other questions.

Quick calculated answer values are available based on the responses you provide thus helping you in easy inference of the responses.

To populate a calculated field, follow these steps:

1. Select an amount, quantity, or numeric question type.
2. Select the option of making this a calculated answer type.
3. Provide the calculation logic.

> **i** Note
>
> Calculated answers are read-only during runtime.

In a calculation, you can either choose a response from an existing question, or enter a constant numeric value as the operand.

This option is not available by default. You must personalize this in the adaptation mode.

17.3.2.14 Score Surveys

Add values for scoring to multiple choice, quantity, and amount questions.

Assigning values at the question level allows you to weight certain questions to have a higher impact on the results overall. Survey respondents do not see these score values when they are completing the survey. The scores are shown in your PDF summary or in your survey reports.

Related Information

Score Quantity and Amount Questions [page 795]

17.3.2.15 Additional Information for Questions

Add help text for your question.

Text you enter here appears in a help icon next to the question. The survey respondent can click the icon to see the text.

17.3.2.16 Short Description for Questions

Add a description to quickly find your previously created questions.

The short description field is for internal purposes only and is not shown to survey respondents. Short descriptions are helpful when selecting questions from the question bank.

17.3.2.17 Mandatory Questions

Make questions mandatory for survey submission.

When designing a question, use the mandatory checkbox to require the respondent to answer the question to submit the survey. When completing the survey, the question displays an asterisk and an error is given when an attempt to submit the survey is made without answering the question.

17.3.2.18 Matrix Questions

Create flexible matrix questions to fit your survey question needs.

Effectively collect data for different sources and categories with individual matrix questions. Decide how many rows and columns for each matrix question and what answer options to display.

For matrix questions, you answer options are restricted to:

- Radio Button
- Checkbox
- Numeric Value
- Text Value
- Dropdown List

Example

Solution Guide for SAP Sales Cloud
Surveys

17.3.3 Survey Question Bank

Store survey questions for easy reuse in multiple surveys.

The Survey Question Bank stores frequently used questions that can be added to multiple surveys. You can add questions to the questions bank when you are creating questions for a survey or create questions in the bank directly for a later use.

When designing a survey question, use *Add To Question Bank* to save your question so you can use it again in another survey. When you are ready to use one of your saved questions, use *Add From Question Bank* to select a previously prepared question.

The usage and maintenance of question are controlled by the status.

- *In Preparation* – Questions are modifiable and can't be used in a survey. This is a default status when questions are created from question bank.
- *Active* – Questions can be used in surveys. This is the default status when the question is created from the survey and added to the question bank.
- *Obsolete* – Questions cannot be used in a survey. The status can only be changed to *Active* if the question is used in a survey. It can be changed to *In Preparation* at any time.

17.3.4 Copy Previous Answers

Automatically populate answers from a past visit in a survey.

You can copy answers from a previous visit's survey by selecting the *Include Previous Answers* flag in the survey details view. All answers from a previous visit's survey get copied for the current survey. To exclude the previous answers for a specific question in the survey, select the flag for *Exclude Previous Answer* available at the individual survey question level. This flag overrides the *Include Previous Answers* setting and ensures that previous answers do not get copied for the selected question.

> **i Note**
>
> The *Exclude Previous Answer* flag appears in survey questions only if you have selected the flag for *Previous Answers* in the survey header.

17.3.4.1 Copy Previous Answers and Previous Products in Opportunities

When designing surveys for use in opportunities, you can now specify to copy either previous answers or previous products from the last survey executed.

The survey completion process is streamlined for improved efficiency. The copy process is executed automatically during survey execution. To enable this function, select the *previous answers* checkbox and the *previous runtime products* checkbox while designing the survey.

17.3.5 Matrix View for Surveys

Simplify the layout of your product survey questions, and answer all questions for all products quickly.

With the *Matrix View* checkbox in the survey you can simplify the layout of the questions for each product. The matrix view allows you to view the products in your survey as rows and the questions in your survey as columns.

> **i Note**
>
> Matrix view is for product surveys, competitor product surveys, and registered product surveys only.

In the SAP Fiori Client, quickly access the sort and filter options directly beneath each question. Select the question at the top of the column to see more options such as

- Full text of a question
- Set all answers to
- Attachments

17.3.6 Pagination in Matrix Surveys

Design your survey layout to distribute product questions in different pages.

The number of pages rendered in a survey depends on the available height of the device screen and the number of products.

Pagination offers the ability to navigate to and jump between different pages in a survey. The scrolling between pages is faster and it significantly improves performance, particularly in large product matrix surveys. Note that when you sort or apply filters, the filters are applied across all products in the survey. Use the rewind feature to rewind to page 1.

During survey design, select the flag *Pagination* in the *Details* tab to enable pagination for a survey.

> **i Note**
>
> This feature is only available in SAP Cloud for Customer, Extended Edition.

17.3.7 Add Branching Logic to a Survey Question

Based on how respondents answer the current question, they can skip questions that are no longer applicable, and jump to a later question in the survey sequence. Define survey branching when you design the question.

Context

This feature allows you to branch respondents to different questions in the survey sequence based on their responses.

> → Tip
>
> It's recommended that you define all the questions in the survey before you set the branching logic.

Procedure

1. Under the *Design* tab, select the question to which you want to add the branching logic.
2. In the *Branch To* field, choose the next question that you want respondents to see after they answer the current question. For multiple-choice (select one) questions, branching is defined at the answer option level. You can choose a different branching target for each answer option.

   > i Note
   >
   > Branching only allows forward progress within a survey. You can only select a future question as the branching target.

   If branching isn't defined, respondents are taken to the next question in your survey sequence.

3. In the *Unanswered Branch To* field, define what the next question is when no answer is submitted.

   If the field isn't defined and no answer is submitted for a question with branching, respondents are taken to the next question in your survey sequence.

   > i Note
   >
   > The *Unanswered Branch To* field was earlier called *Default Branching*. From the February 2019 release, enhancements have been made so that the behavior is consistent across all the clients. To know more about how differently it worked before, read this blog.

4. When you finish, save your entries.

   Once you apply branching in your survey, the *Branching Logic* flag gets automatically checked in the survey details.

Next Steps

Preview your survey with a *Simulation* to see if the questions are logically displayed as expected.

In the matrix view, all questions are displayed, but respondents can only answer questions that are applicable based on the branching logic. The others are grayed out.

17.3.8 Dynamically Display Answer Options in a Survey Question

Based on how a respondent answers a previous question, answer options in the current question can be dynamically filtered. Define the source question and maintain answer option dependencies when you design the question.

Context

This feature allows you to present a more concise survey by only showing answer options that are relevant to the respondent.

> → Tip
>
> It is recommended that you define all the questions in the survey before you define answer option dependencies.

Procedure

1. Under the *Design* tab, select the question whose answer options need to be dynamically displayed.
2. Toggle on the *Add Source Question* button.
3. Select a *Source Question*.

   > i Note
   >
   > Only multiple choice single select questions are available for selection. One question can be selected as a source question more than once.

4. For each answer option, you can select one or multiple source answer options.

   When multiple source answer options are selected, that means as long as the respondent chooses **any one** of those source answer options during survey execution, the selected answer option is displayed.

5. Once you finish defining source answer options for all the answer options, save your entries.

Next Steps

Preview your survey with a *Simulation* to see if the answer options are dynamically filtered as expected.

17.3.9 Add Products to Product Surveys

You can add products to your survey while you are completing it.

Set the flag for *Add Products from Product List* in the *Details* tab to enable adding products when completing surveys. The products that you add when you are completing a survey can be filtered using parameters such as product category, sales organization, and distribution channel.

Related Information

Product Surveys [page 774]

17.3.10 Define Product Determination Rules for Surveys

Products or product lists can be dynamically assigned to a survey at runtime, provided the product determination rules have been defined by your administrators.

This feature is helpful when product determination is based on various conditions and you are not sure which specific products or product lists should be added during survey design time. Products or product lists that are added using rules are not directly attached to the survey, allowing one product survey to be easily reused for different products in different scenarios.

> **i Note**
>
> If you have explicitly added certain products to the survey, those products are displayed in the survey regardless of the rules.

Related Information

Add Products to Product Surveys [page 791]

17.3.10.1 Configure Product Determination Rules for Surveys

Administrators can create rules for the system to dynamically assign products or product lists to a survey at runtime.

Context

This rule framework allows you to define both product determination and classification.

> ! Restriction
>
> Products and product lists cannot be maintained together in a single rule.

Procedure

1. Go to ▮ *Administrator* ❯ *Sales and Campaign Settings* ❯ *Define Rules for Survey Product Determination* ❯ to launch the rules table.

2. If it is your first time to create rules, use *Adapt Columns* to set up the rules table. You can have up to 20 columns in the table, including last three result columns, *Product*, *Product List ID*, and *Classification*.

   > → Tip
   >
   > We recommend that you remove any unwanted columns and only keep required ones as extra columns can impact system performance.

3. Choose *Insert Row* above the rules table. A new row with an asterisk in each field is added to the table.

   You can add values to more than one field in a row. The fields in one row evaluate as a logical **AND** relationship, which means the field values must all evaluate to true in order for the rule to evaluate to true.

4. Click the asterisk symbol in a cell to enter a value for that field. The rules table offers a variety of logical operators to define your values.

5. Continue to add rows for each desired result.

   The rows in the rules table evaluate as a logical **OR** relationship. The system compares each rule from top to bottom until it finds one match, which suggests that the most specific rule should be placed at the top of the table and generic ones should be near the bottom.

   You can rearrange rows by selecting the row and clicking *Swap*.

6. Click *Save* when you finish.

7. Click *Activate Rules*.

   For your updated rules, unless you reactivate them, otherwise the previous rule sets continue to execute.

17.3.11 Add Products and Search Products Using Barcode Scanner

You can conveniently add products in a survey and search products inside a survey using a barcode scanner.

The process of adding product information in the survey is simplified thus the productivity is improved.

> **i Note**
>
> - This feature is only available for the mobile apps in the online scenario.
> - To use this feature, the barcode of Global Trade Item Number (GTIN) should be maintained for the products.
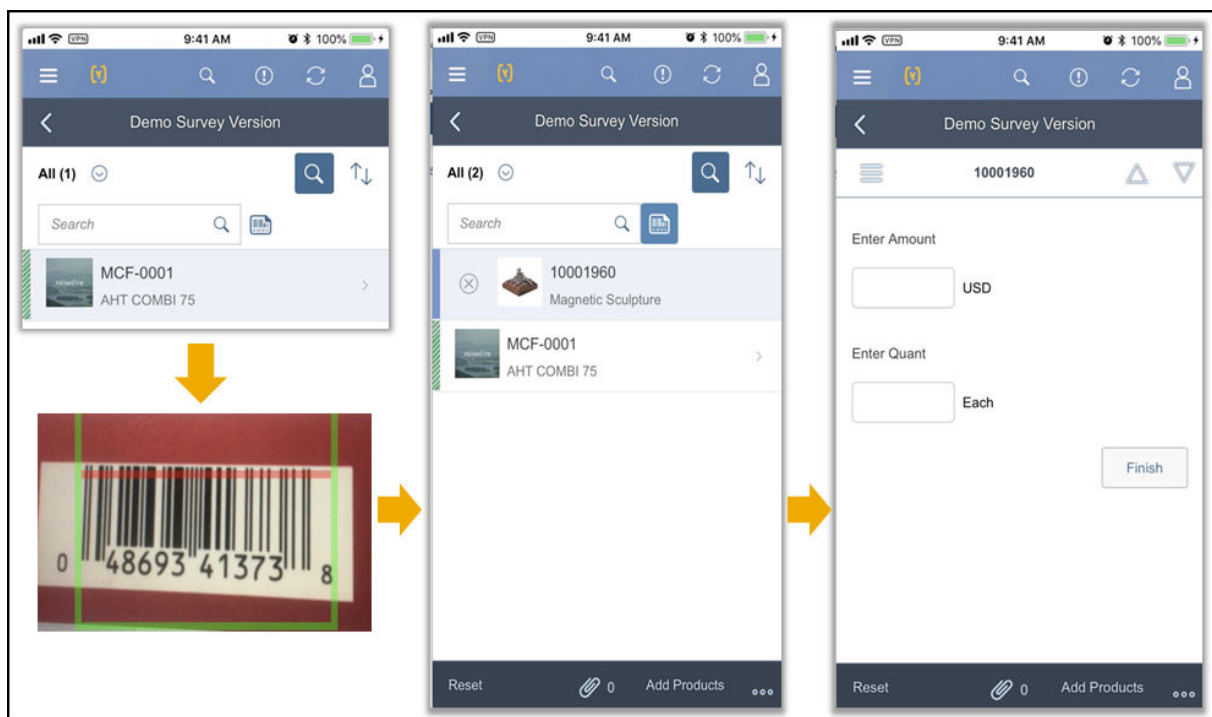
17.3.12 Disable Addition of Products During Survey Execution

The *Add Products* option during survey execution can now be switched off as part of survey design.

You can now disable the *Add Product* option during survey execution by selecting the **Block Runtime Products Addition** checkbox when you design the survey. It offers you an enhanced control when the addition of products during survey execution is not desired.

17.3.13 Product Classification in Product Surveys

Products in a survey can now be flexibly classified to simplify survey execution.

The product classification is based on a rule framework. Products can also be classified as mandatory based on the rule framework. The classification enables you to quickly identify all the surveyed products of a certain classification and allows for more efficient prioritization and completion. It can be used to ensure that the mandatory products are answered before the completion of the survey.

As an administrator, you can maintain the classifications in the fine tuning activity. To maintain the rule framework, go to ▌ *Administrator* ❭ *Sales and Campaign Settings* ❭ *Define rules for Survey Product classification* ❭.

17.3.14 Restrict Access to Surveys

Make surveys available to only a specific sales or service organization.

You can assign a sales or service organization to a survey to make it restrict access to members of the organization. Once the organization has been assigned, it takes one day to apply the changes and reflect the new access restrictions.

17.3.15 Assign Surveys

Surveys can be assigned to visits, leads, opportunities, and so on.

Related Information

Create Activity Plans [page 705]

17.3.16 Score Multiple Choice Surveys

Add scoring values to multiple choice questions and answer options.

For each multiple choice (select multiple) and multiple choice (select one) question, set a score value at the question level and at the answer level when you design them.

17.3.16.1 Score Quantity and Amount Questions

Add scoring options for quantity and amount questions in your surveys.

Context

Define score values at the question level and answer level for quantity and amount questions when designing your survey.

Procedure

1. When you are editing a quantity or amount question in a survey, enter a value next to *Score* for the question
2. Under *Answer Ranges and Corresponding Score Values* define the *Min* and *Max* values to create answer ranges that correspond to a *Score*. Answer range min and max values must align the upper and lower limit values you have set for the answer field. The range includes the min and max values you set so you cannot set the same value for the max of one answer range and the min of the next answer range.

3. Enter a *Score* value for each answer range.

Results

In the *Design* tab for your survey, you see the *Score*, the *Minimum Score*, and *Maximum Score* for the question.

17.3.16.2 Survey Score Calculations

Calculate your minimum and maximum scores for multiple-choice questions and surveys overall.

In a multiple-choice survey, the values you set during design time determine the *Minimum Score* , *Maximum Score*, and actual score for each question.

Use the personalization feature to make the fields visible for the actual score and the maximum and minimum scores that can be reached in the *Design* tab. In the*Results* tab, you can add the field for *Total Score*, and in the survey header you can add the *Score Min/Max* field to view the overall minimum and maximum scores available in a survey.

> i Note
>
> The scores are not shown when the employee fills out the survey.

	Minimum Score	*Maximum Score*	**Actual Score**
Multiple Choice (select one)	The score is calculated by multiplying the lowest answer score by the question score.	The score is calculated by multiplying the highest answer score by the question score.	This score is calculated by multiplying the answer chosen by the question score.
	Example **Question 1** Score: 1 • Answer A: 1 • Answer B: 2 • Answer C: 3 Question 1 Minimum Score: 1*1=1 **Question 2** Score: 1 • Answer A: 3 • Answer B: -2 • Answer C: -3 Question 2 Minimum Score: −3*1=−3	**Example** **Question 1** Score: 1 • Answer A: 1 • Answer B: 2 • Answer C: 3 Question 1 Maximum Score: 3*1=3 **Question 2** Score: 1 • Answer A: 3 • Answer B: -2 • Answer C: -3 Question 2 Maximum Score: 3*1=3	**Example** **Question 1** Score: 1 • Answer A: 1 • Answer B: 2 • Answer C: 3 Answer Chosen = A Question 1 Actual score: 1*1=3 **Question 2** Score: 1 • Answer A: 3 • Answer B: -2 • Answer C: -3 Question 2 Actual Score: -2*1= -2

Multiple Choice (select multiple)	The score is calculated by summing up the lowest reachable answer scores and multiplying it by the question score.	The score is calculated by summing up the highest reachable answer scores and multiplying it by the question score.	This score is calculated by summing up the chosen answer scores and multiplying it by the question score.
	❖ Example **Question 1** Score: 1 • Answer A: 1 • Answer B: 2 • Answer C: 3 Minimum Score: 1*1=1 **Question 2** Score: 1 • Answer A: 3 • Answer B: -2 • Answer C: -3 Minimum Score: (-2+ (-3))*1= -5	**❖ Example** **Question 1** Score: 1 • Answer A: 1 • Answer B: 2 • Answer C: 3 Maximum Score: (2+3+1)*1=6 **Question 2** Score: 1 • Answer A: 3 • Answer B: -2 • Answer C: -3 Maximum Score: 3*1=3	**❖ Example** **Question 1** Score: 1 • Answer A: 1 • Answer B: 2 • Answer C: 3 Answers Chosen = A and B Question 1 Actual score: 1+2*1=3 **Question 2** Score: 1 • Answer A: 3 • Answer B: -2 • Answer C: -3 Answer Chosen = B and C Question 2 Actual Score: -2+-3*1= -5
Overall Survey Total This total is shown in the *Details* view of the survey as *Score Min/Max*.	The overall survey minimum score is the sum of all minimum scores in the survey.	The overall survey maximum score is the sum of all maximum scores in the survey.	The overall survey actual score is the sum of all actual scores in a suvey.

17.3.16.3 Section Summary for Checklist Surveys

View scores for each section in a checklist survey.

If a survey has multiple sections with scoring assigned in each of these sections, the survey summary shows the score for each section.
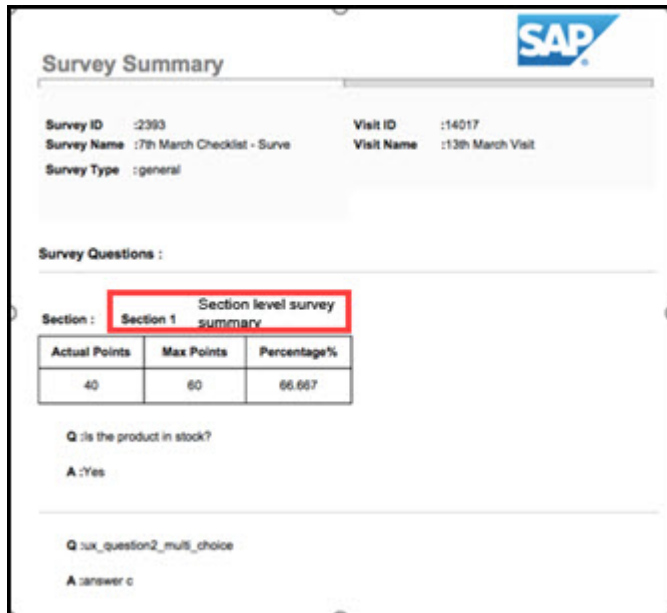
17.3.17 Survey Simulation

Preview surveys with a simulation.

When you are designing a survey, use the *Simulation* action to ensure that it meets your needs. You can view the format and all questions, exceptions, and products in the simulation as well as select answers for the questions. The answers you select are only for preview purposes and the data is not saved or stored.

17.3.18 Survey Exceptions

Use exceptions to check for inappropriate responses and help collect more accurate data in internal surveys.

Exceptions for answers in internal surveys help identify invalid responses in real time or offer additional information based on predefined conditions. Exceptions help identify potential user errors such as entering a price that is too low or too high for an item. This feature allows users to correct their entry before submitting the survey, and therefore creates more accurate data reporting overall.

You can view exceptions for a survey in the *Exceptions* view. Select a description under *Conditions* to view the question it applies to under *Related Questions*.

17.3.18.1 Create Survey Exceptions

Create survey exceptions after you've added all questions to your survey.

Context

Exceptions can be created only for amount, date, multiple choice – multiple select, multiple choice – single select, and quantity question types.

> **i Note**
>
> This feature is available in the SAP Fiori client only.

Procedure

1. Open a survey and navigate to the *Exceptions* view.
2. Click *Add* to enter a description for your exception. The description is the text that the user sees when the exception conditions have been met.
3. Choose a question for your exception from the dropdown menu. The dropdown menu shows only questions eligible for exceptions.
4. Set the operators and values for your exception. For amount, date, and quantity question types, set a range or restriction operator and a value for the exception. For multiple choice question types, select the answers that are required to trigger the exception.
5. Click *Ok* to save your exception.

Related Information

17.3.18.2 Survey Comparison Exception Using Reference Questions

Use survey questions as references for survey exceptions.

For amount, quantity, and date questions, you can use other questions from your survey as a reference to create a comparison exception. When you design a survey, go to *Exceptions* to add an exception for your survey. Select the *Use Reference Question* checkbox and select a question from your survey. Use the same operators as you would a regular survey exception to define the exception criteria and add the exception to your survey.

When the survey gets completed, users can check for survey exceptions, and the system uses the reference question and operator you've chosen to determine when an exception should be displayed.

Example

If you have a question that asks for the manufacturer's retail price of a product and a question that asks for the list price for the product, you can create an exception that appears if the list price does not equal the manufacturer's retail price.
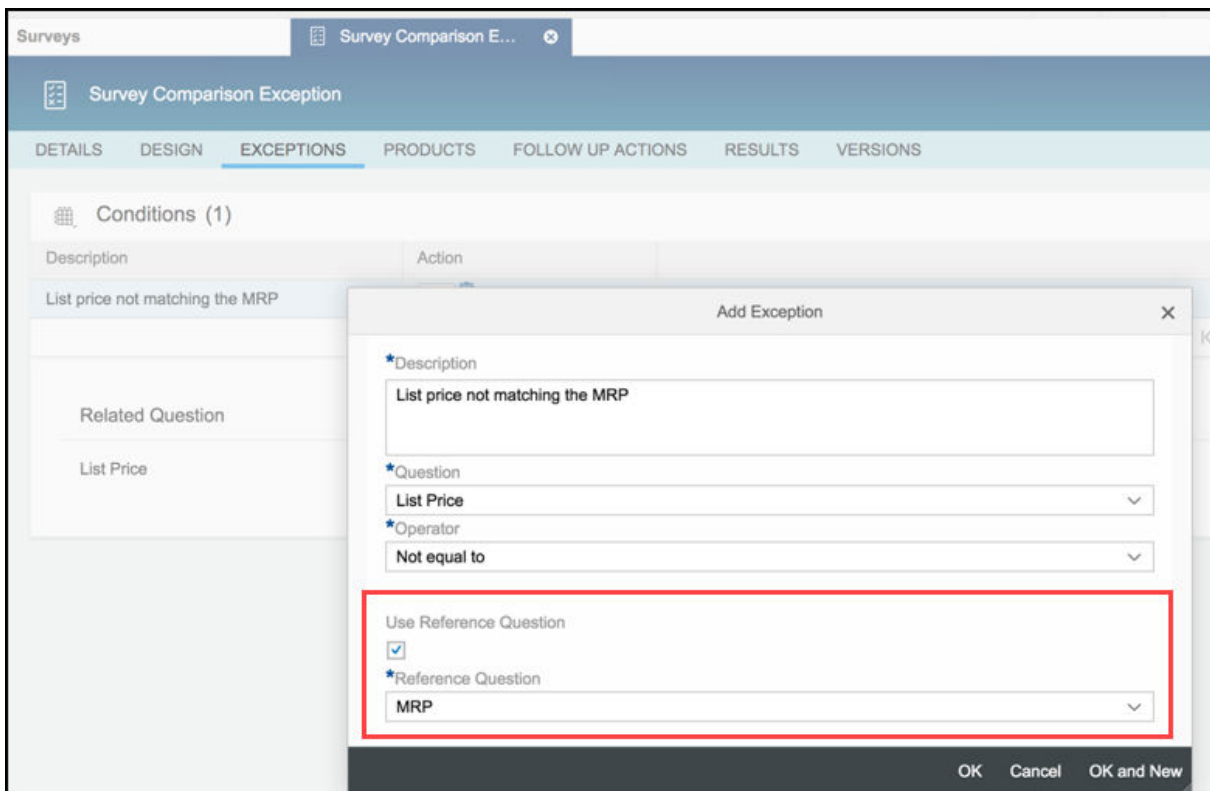
17.3.18.3 Survey Exceptions for Matrix Surveys

Survey exceptions are now available for matrix surveys.

Exceptions for answers in internal surveys help identify invalid responses in real time or offer additional information based on predefined conditions. Exceptions help identify potential user errors such as entering a price that is too low or too high for an item. This feature allows users to correct their entry before submitting the survey, and therefore creates more accurate data reporting overall. View exceptions next to each question in a matrix survey.

You can view exceptions for a survey in the *Exceptions* view. Select a description under *Conditions* to view the question it applies to under *Related Questions*.

17.3.19 Set Up Automatic Creation of Follow-Up Tasks in Surveys

Upon survey submission, the system can automatically generate follow-up tasks from surveys when conditions are met. This feature is available in online mode for all survey types, except satisfaction surveys.

Prerequisites

You've defined survey exceptions to be used as preconditions for triggering automatic generation.

Context

```
<object data="https://www.kaltura.com/p/1921661/sp/192166100/embedIframeJs/uiconf_id/37285991/
partner_id/1921661?iframeembed=true&amp;playerId=kaltura_player&amp;entry_id=1_6wdmo9jz"
type="application/x-shockwave-flash" height="360" width="640">

<param name="allowFullScreen" value="true"/>

<param name="openInNewWindowLink" value="true"/>

</object>
```

In surveys, follow-up tasks can be created in response to any problems or customer needs identified during survey execution. Automatic generation of follow-up tasks further streamlines this process, allowing sales reps to better track survey outcomes with less manual intervention.

> ! Restriction
>
> Currently, for each survey, administrators can choose only one exception, set up only one condition for triggering task generation.

Procedure

1. Navigate to the *Follow-Up Actions* tab.
2. Add a follow-up item, and choose the type *Task*.
3. Under *Preconditions*, choose an exception that you've defined.
4. Under *Follow-Up Details*, predefine *Task Subject* by mapping the attribute to a question response.

   > i Note
   >
   > We only support *Multiple Choice (select one)* and *Text* question types for mapping.
   >
   > As *Subject* is a required field to create a task, you must map it to a question that is marked as mandatory for answering.

5. Save your entries.

   In product surveys, one follow-up task can be generated for each product that meets the condition.

Related Information

[Create Survey Exceptions [page 799]](#)

17.3.20 Set Up Automatic Creation of Follow-Up Tickets in Registered Product Surveys

Upon survey submission, the system can automatically generate follow-up tickets from registered product surveys if conditions are met. This feature is available online only.

Prerequisites

You've defined survey exceptions to be used as preconditions for triggering automatic generation.

Context

In registered product surveys, it's imperative that follow-up tickets can be created as a result of the survey response to a customer issue, or to address a problem in the health of an asset during product audit. Automatic generation of follow-up tickets streamlines this process, allowing sales reps to better track survey outcomes with less manual intervention.

> ! Restriction
>
> Currently, for each registered product survey, administrators can choose only one exception, set up only one condition for triggering ticket generation.

Procedure

1. Navigate to the *Follow-Up Actions* tab.
2. Add a follow-up item, and choose the type *Ticket*.
3. Under *Preconditions*, choose an exception that you've defined.

4. Under *Follow-Up Details*, predefine ticket attributes including *Subject* and *Description* by mapping them to question responses.

> **i Note**
>
> We only support *Multiple Choice (select one)* and *Text* question types for mapping.
>
> As *Subject* is a required field to create a ticket, you must map it to a question that is marked as mandatory for answering.

5. Save your entries.

   One follow-up task can be generated for each registered product that meets the condition.

Related Information

Create Survey Exceptions [page 799]

17.3.21 Create a Sales Quote or Sales Order as A Follow-Up Item from a Survey

Design your survey to create and populate a sales quote or sales order automatically based on the answers to the questions in the survey.

Prerequisites

Create a product survey that includes two specific question types that initiate the creation of a sales quote or order. You'll need to create a multiple choice single select question with an answer that initiates the creation of a sales quote or order for a product and a quantity question that determines the quantity of the product to add. You must create these questions before you add the follow-up action to your survey.

Procedure

1. When designing a survey, under *Follow-Up Actions*, *Add* a follow-up item to your survey.
2. Select *Create Sales Quote* or *Create Sales Order* from the dropdown menu.
3. Select a question from the *Question* dropdown menu. Only multiple choice single select questions are available here.
4. Select the answer choice you want to trigger the creation of the sales quote.
5. Select a question from the *Quantity* dropdown menu. The sales quote or sales order uses the answer to the quantity question to populate the quantity field.

> **i Note**
>
> Selecting a quantity question and autopopulating the sales quote or sales order is optional. You can manually input the quantity in the sales quote or order.

Example

Let's say you want to create a sales quote as a follow-up item from a survey and autopopulate quantity based on the answer to a question. First, you'd create a multiple choice (select one) question that asks if you would like to create a sales quote for this product with the answers yes and no. Next, you'd create a quantity question that asks how many items to add to the sales quote. Then add the follow-up sales quote. Set the sales quote question and the answer yes as the trigger for the creation of the sales quote. Then set the quantity question to autopopulate the sales quote.

17.3.22 Create Surveys in Multiple Languages

Create a survey and add descriptions, questions, and answers in additional languages.

Context

When you create a survey, you can manually add other language options for the descriptions, questions, and answers. During design time, select the globe icon to edit the language options.

> **i Note**
>
> Multiple languages are not supported for survey exceptions.

Procedure

1. Open a survey and under *Details*, select the globe icon next to the name of the survey.
2. Select *Add* to add an additional language to the description. You can *Delete* a selected (highlighted) item in the list.
3. Once you have added or removed the languages, select *Update Languages* to sync all of the available text fields within a survey with the languages. This action updates all text fields with the same languages you set for the survey name.

   > **⚠ Caution**
   >
   > If you delete a language, and select *Update Languages* all corresponding text fields within your survey will deleted. Any existing text that you have entered for questions, descriptions, and answers in the language you deleted will also be deleted.

4. Once you have added additional languages to the survey from the survey name, you can go to the *Design* tab to add text for existing questions in the new languages.

> **i Note**
>
> You can only add and remove additional languages to your survey from the survey name. You cannot add or remove languages from any other field.

5. Select the globe icon next to a text field such as the survey name, question, description, or answer.

6. Enter the corresponding text for the language you just added. The language field will be prepopulated according to your entry for the survey name.

7. Select *OK*.

> **i Note**
>
> You must enter text in all applicable fields for all languages to activate a survey. The system displays a warning symbol and message when you have left a text field blank.

17.3.23 OData Services for Surveys

Odata services are available for both design time and runtime time of surveys.

The OData services can help in mass migration from one system to another in survey design time. The services can be used to update or modify responses within a survey from an external system.

17.3.24 Update Marketing Attributes Using a Survey

You can now update marketing attributes for Accounts and Contacts using a survey.

Multiple attributes can be updated in one survey question. To enable this function, add a question of type 'attribute' and select the attribute set and attribute to be added in the survey.

> ### i Note
>
> - Only the default contact marketing attributes can be updated.
> - Only one question of type attributes can be included in a survey.
> - Only update is possible. Create scenarios are not supported.

17.3.25 Satisfaction Surveys

Collect feedback from your customers with a satisfaction survey.

Context

Create satisfaction surveys that you can send out to your customers using an e-mail template. Your customers can rate how satisfied they are with several answer options based on a scale you create. You can also use all other question types in satisfaction surveys to collect more details about your customers.

After users complete a satisfaction survey, they receive a message signifying that they have completed the survey and thanking them for their participation. You can configure this message for each of your satisfaction surveys to meet your brand and business needs.

> ### i Note
>
> Satisfaction surveys aren't available on the iPad and are therefore also not available for offline usage.

Procedure

1. Add a new survey, choose the *Satisfaction* category and fill in the basic information.
2. Add satisfaction questions by selecting *Customer Satisfaction* under *Question Category* and use *Multiple Choice (select one)* questions to set your scale. Here, you could choose to use numerical values and give a rating scale in your short descriptions or use the answer options to describe satisfaction.
3. Add other additional question types if you'd like to collect other data in your survey.
4. Under *Survey End Message*, format and enter the message you'd like your participants to receive upon completion.
5. Select *Save*.

17.3.26 Transfer Surveys Using Transport Management

As an administrator, you can transfer surveys from one system to another using the Transport Management System.

This provides you with an easy way of migrating surveys from a test to a productive environment thus helping you save implementation time.

To transport surveys from one system to another, follow these steps:

1. Go to ▶ *Administrator* ❯ *Transport Management* ◗ and choose *New* to create a transport request.
2. In the *Transport Request* screen, choose *Select*.
3. In the *Select Transport Objects* dialog, select *Surveys* from the *Transport Object* dropdown menu, and then choose *OK*.
   All the available transport objects are list in the *Available Transport Objects* table.
4. Select the transport objects in the *Available Transport Objects* table and choose *Add Selected* to add the object to the *Selected Transport Objects* table.
5. Go to ▶ *Target Systems* ❯ *Add System* ◗, select the systems where you want to transport the survey, and choose *OK*.
6. Choose ▶ *Actions* ❯ *Assemble* ◗ to create a zip file of all survey content to be transported.

   > **i Note**
   >
   > You can download the zip file on the *Transport Content* tab and verify its content.

7. Choose ▶ *Action* ❯ *Release* ◗ to export the surveys to the target systems.

   > **i Note**
   >
   > You can check the assemble and release information on the *Transport Logs* tab.

8. Log on to the target system and go to ▶ *Administrator* ❯ *Transport Management* ❯ *All Transport Requests* ◗.
   A survey object with the *Imported* status appears in the table.
9. Select the imported object and you can see the list of surveys assembled in the source system.
10. Choose ▶ *Action* ❯ *Activate* ◗ to transport all the surveys to the target system.

17.4   Complete Surveys

Choose how to answer questions and complete surveys.

17.4.1 Save, Finish, and Submit Surveys

Understand your options for completing surveys.

Use the following actions when you are filling out a survey:

- *Save as Draft*: Save your surveys as drafts so you can pick them up later for completion.
- *Finish*: Complete responses for a specific product in product checklist surveys.
- *Submit*: Officially set a survey to status *Completed* and save the survey to your system.
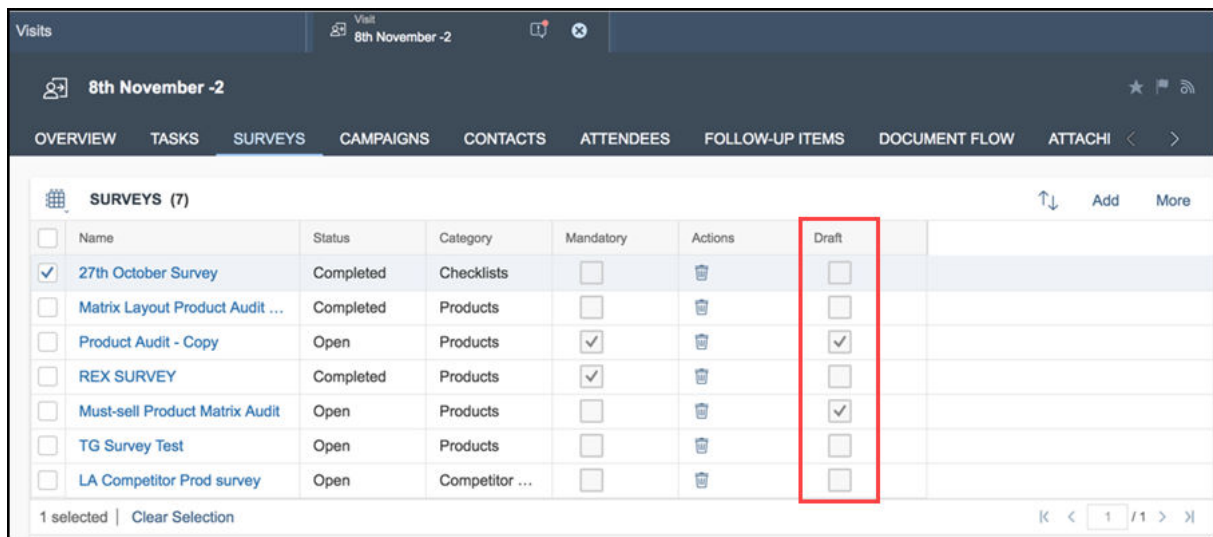
17.4.1.1 Indicator for Surveys Saved as Draft

Draft indicator is available for surveys.

You can easily distinguish between surveys in open status and in draft status using a *Draft* indicator field, and quickly find the surveys you still need to complete.

> ### i Note
>
> This feature is enabled but hidden by default. You can use the key user tool to make the *Draft* indicator field available on the screen.

17.4.2 View Survey Progress

Use the progress bar to view your completion rate when completing a survey.

At the bottom of your survey, view how many questions you've answered and the total number of questions in a survey in the progress bar. It updates automatically each time you answer a question. For product surveys, you'll see your progress for the product you're currently viewing and the number of questions per product.

> **i Note**
>
> The progress bar is only available for surveys without branching, checklist surveys, and the checklist view of product surveys.

17.4.3 Check for Survey Exceptions

Use the exception icon to ensure that you have entered appropriate answers.

When you check for exceptions, the exception icon appears next to each question with an inappropriate answer. Click the exception icon to see its description. You can then correct your answers to make the exceptions disappear.
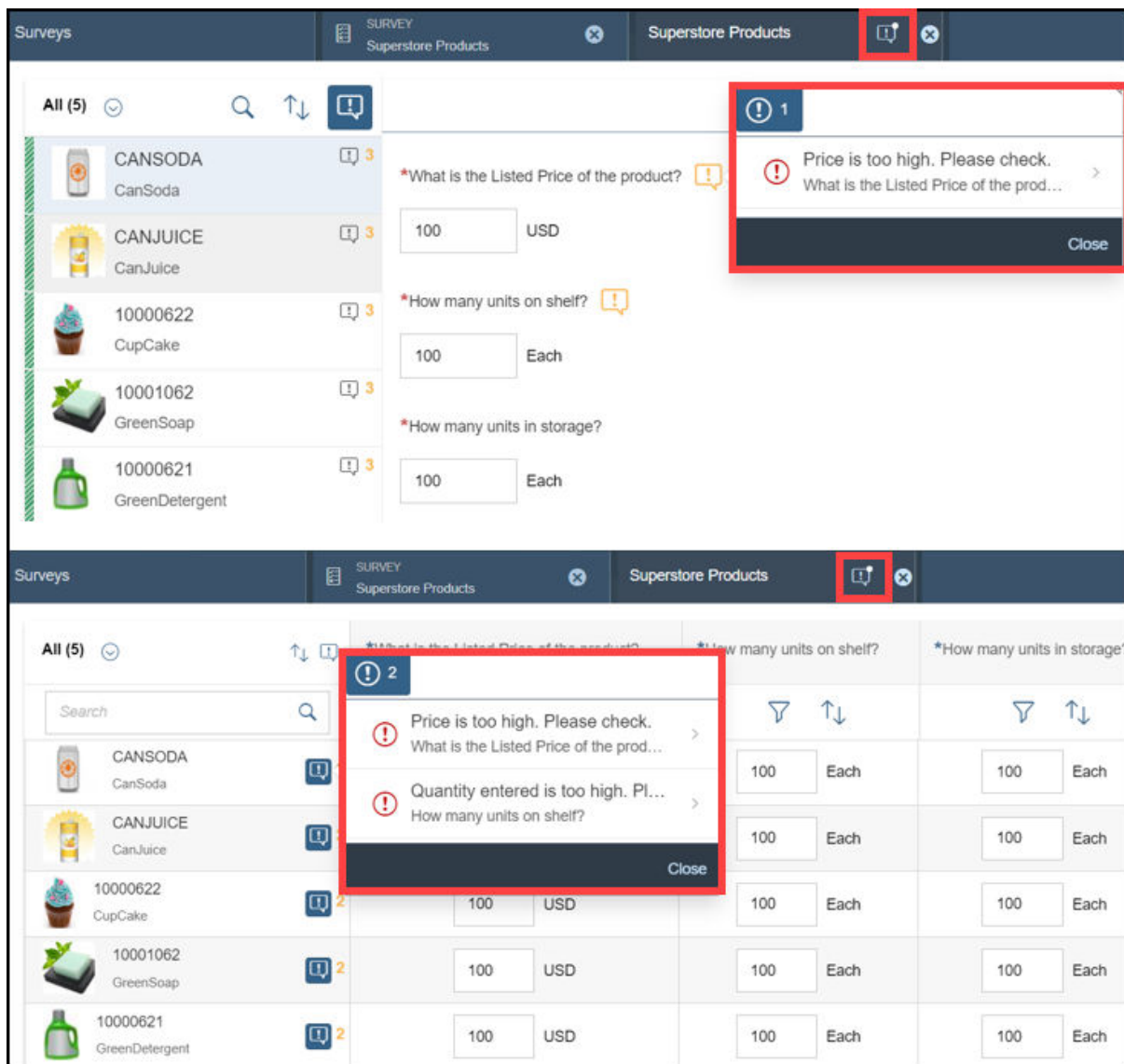
Related Information

Survey Exceptions [page 798]

17.4.4 Add Attachments to Surveys

When you are completing a survey, you can add attachments to it.

When you are completing a survey, you can capture an image with your device camera and add it as an attachment to an answer. You have the option of selecting a size for this attachment such as small (400x400), medium (600x600), or large (800x800). You can also select the original size of the attachment. The system remembers your most recent selection and applies it to the next image you attach.
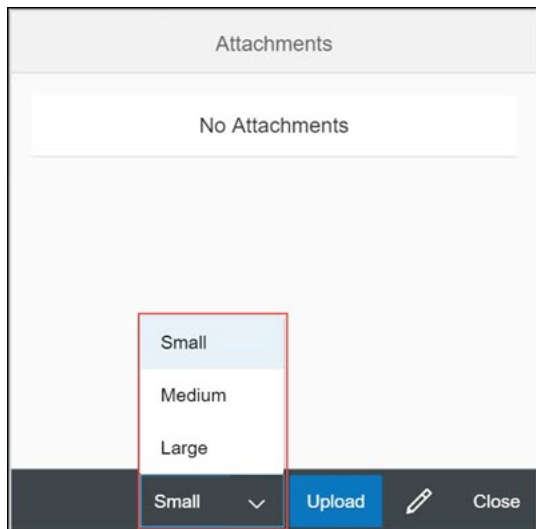
> → Recommendation
>
> For performance reasons, we recommend attaching a maximum of one large picture, 10 medium pictures, or 30 small pictures per survey.

17.4.5 Survey PDF Summary

Once a survey has been completed within a visit, you can generate a PDF summary of the results.

Context

Survey summaries can include detailed information about the customer and answers to survey questions. Summaries can vary in their content based on how your administrator has configured the survey summary template.

Procedure

1. Open a visit and navigate to the *Survey* view.
2. Select a completed survey from the list of surveys.
3. Select *Actions* and choose *Generate Survey Summary*.
4. Under *Survey Summaries*, select the name of a survey to start the download.

17.4.5.1 Aggregation of Survey Results

View aggregated scores in the survey summary PDF.

Aggregated scores are displayed at the bottom of the survey summary PDF document.

> **i Note**
>
> To generate the survey summary, you must have already completed and submitted the survey.

The aggregation for product and checklist type surveys is as follows:

The aggregation is for both for scores (assigned for questions and answers) as well as for answer options (in a question). The aggregation is calculated as follows

- **Scores for product surveys** - Product level maximum and actual scores
- **Scores for checklist type surveys** - Question level maximum and actual scores
- **Answer options (Relevant only for product surveys)** - Actual count and the percentage value are displayed for the answer options selected for a question.

The following criteria apply for aggregation of survey results:

- Aggregation is calculated only for *Amount*, *Multiple Choice*, and *Quantity* based questions
- Aggregation rules can be displayed as: *Absolute Value* (valid for multiple choice questions) and *Percentage Average* (valid only for amount and quantity type of questions)

> **i Note**
>
> You must have maintained scores at each question and answer option level when designing a survey.

17.4.5.2 Pictures in Survey Summary

Pictures added to the survey are available in the survey summary pdf.

You can use the pictures as a quick reference to check the answers available in the survey summary pdf.
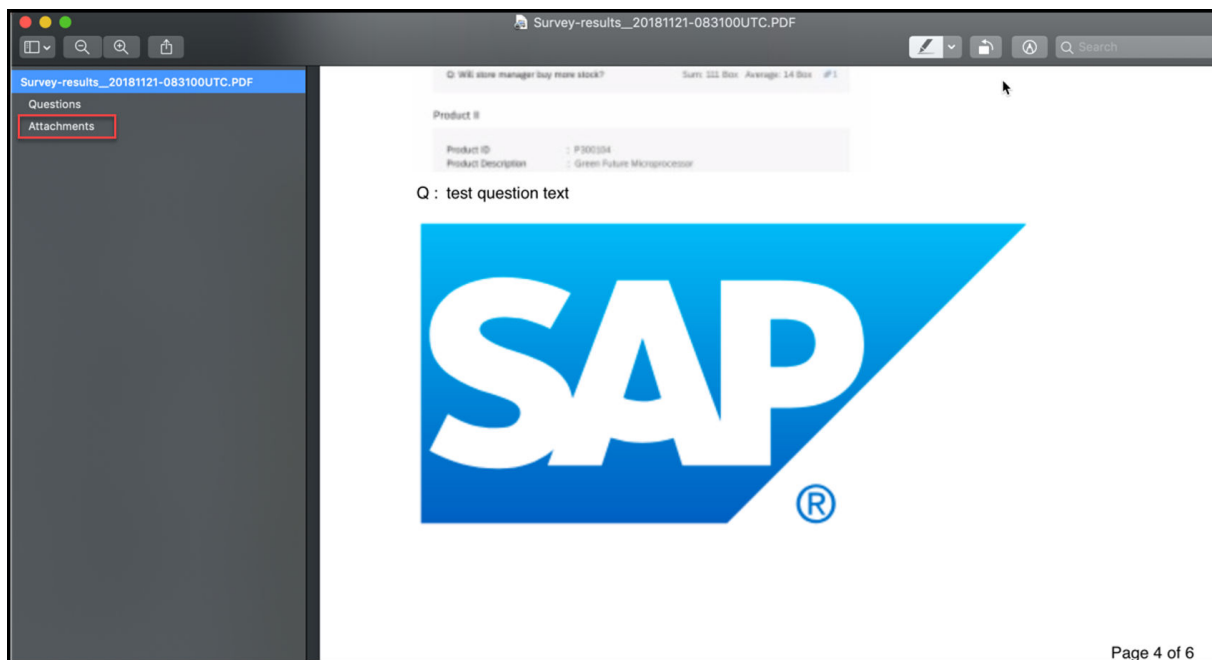
A separate section called *Attachments* is available in the pdf which contains all the attachments of the survey.

> **i Note**
>
> - Only runtime attachments are available in the appendix section of the document.
> - Only checklist view surveys are enabled for this feature.

17.4.6 Related Attachments

You can search for attachments that have been added to surveys during visit execution.

> **i Note**
>
> The *Related Attachments* work center only lists survey attachments that are associated with visits or perfect store visits.

Sort and search through attachments. Use the advanced search options to filter by a specific survey or date and other options to find the attachments you need.

17.4.7 Complete Product Surveys

Product surveys have additional options during survey completion.

17.4.7.1 Status Indicator for Product Surveys

In product surveys that do not use matrix view, track progress of product questions using the status indicator that is displayed alongside the product.

- A green bar indicates that the survey has been *Set to Finish* for the product.
- A green bar with white stripes indicates that a survey is in progress for the product.
- A blue bar indicates that the survey has not been started for the product.

> **i Note**
>
> This feature is only available in the Extended Edition.
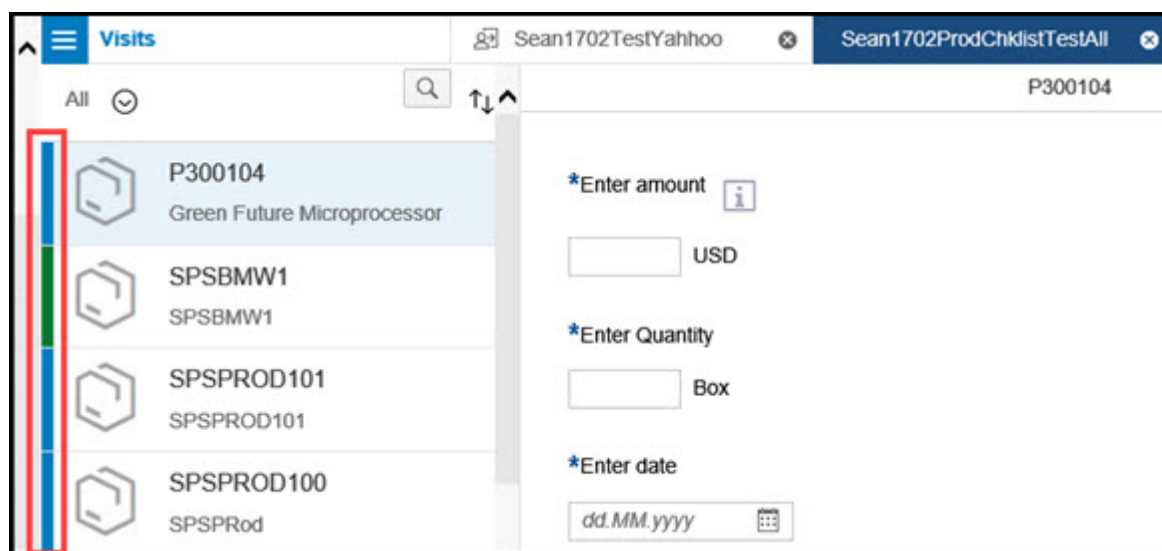
Related Information

17.4.7.2 Copy Products Added During Survey Execution for a Next Visit

For product matrix surveys, during survey execution, you can copy products that you add to the next survey.

Set the flag *Previous Answers* if you want to copy the answers for these products from the previous visit. Deselect the flag for *Previous Runtime Products* in the *Details* tab to turn-off this feature. This function is possible for visits belonging to the same account.

Related Information

17.4.7.3 Add Products from Past Orders in Extended Edition

During survey execution in the Extended Edition, you can add products to a survey from past orders by using the *Past Orders* in the *Add Products* menu.

When you click *Past Orders*, you can select a specific query from the *My Products* bucket. The options include *Account Sales Orders*, *My Past Orders*, *My Past Orders for Account* and *My Past Orders for Account and Sales Area*.

The sales orders that match the selected query are displayed to the left of your screen. To the right, you see a list of products that belong to the selected order. By default, the list displays products for the first sales order in the list.

Related Information

17.4.7.4 Use Image Viewer to View Enlarged Image of Product

Tap on the product image in product surveys to view an enlarged image of the product. Use the navigation arrows and the dotted carousel at the bottom to scroll between products.

17.4.7.5 Configure Add Products from Past Orders in SAP Cloud for Customer, Extended Edition

Administrators can enable this SAP Cloud for Customer, Extended Edition feature by selecting a scoping question.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* ◼. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Sales* 〉 *Account and Activity Management* 〉 *Activity Management* 〉 *Surveys* ◼ to find the corresponding scoping question.

17.4.7.6 Additional Settings for Product Matrix Surveys

View additional options for questions in a product matrix survey.

In each question header, use the three dots view the following options:

Complete Question

View the full text of the question and answers if the matrix view has hidden part of the question.

Mass Answer Entry

When you are filling out a product matrix survey with many products, save time by entering the same answer for all products for one question. Mass answer entry is especially helpful when there is a most-used answer for a question.

Choose *Set all answers to* and select an answer option. You can then change the answers for specific products when necessary.

Filter

Choose the funnel icon to see filtering options such as ascending or descending or sort by answer.

Attachments

Select the photo icon to view any attachments available for the question.

Related Information

17.4.8 Complete Competitor Product Surveys

Competitor product surveys have additional options during survey completion.

17.4.8.1 Add Competitor Product Extension Fields as Questions

When designing a competitor product survey, you can add *Competitor Product Extension Fields* question type to include an extension field maintained at the competitor product header.

Such extension fields are read-only in the survey. The values maintained at the product level are determined for user reference at the time of survey execution.

17.4.8.2 Filter Competitor Products by Related Product Category

During competitor audits, you can filter long lists of products by category. This category is the *Product Category* maintained under the associated *Our Product*.

17.4.8.3 Add Competitor Products at Survey Runtime

During in-store audits, sales reps can add competitor products that are not part of the audit lists.

Existing functionalities *Previous Runtime Products* and *Block Runtime Products Addition* flags under survey details also apply to this feature.

> **i Note**
>
> This feature is only supported online.

Related Information

Copy Previous Answers and Previous Products in Opportunities [page 787]
Disable Addition of Products During Survey Execution [page 793]

17.4.9 Survey Results for Individual Customers

View survey results for individual customers.

Go to the *Survey Results* view for an individual customer to see all surveys assigned to the individual customer. Use the dropdown menu to select the business object you'd like to search from such as a visit and see the list of completed surveys. You can see the details of the survey by selecting the survey name.

17.4.10 Create Follow-Up Tasks from Surveys

You can create and view follow-up tasks while conducting a product or checklist survey. In the matrix view of a product survey, follow-up tasks can be created per product. In checklist surveys, follow-up tasks can be created at the survey level. This feature is currently available online only.

As a prerequisite, when designing the survey, administrators must turn on the *Follow-up Tasks* indicator.
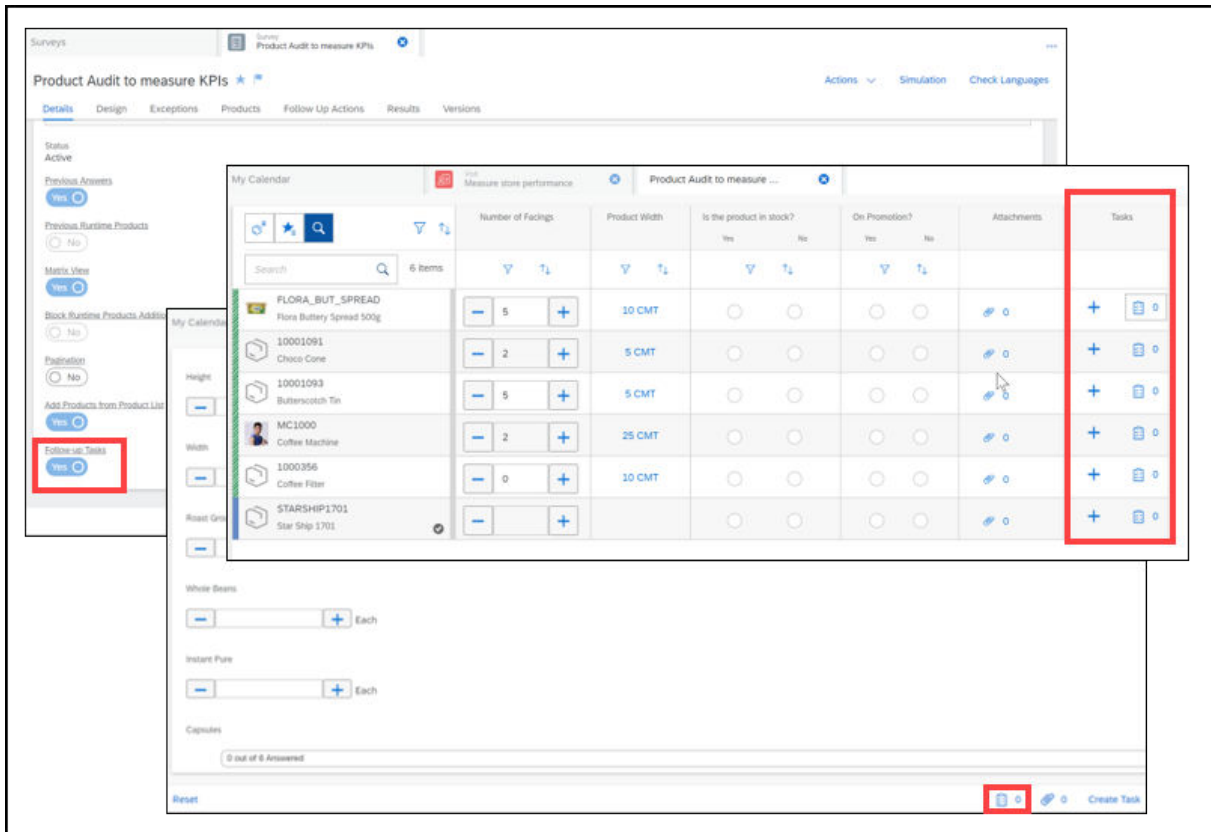
You can also attach the survey's summary to any follow-up task that you create, by turning on the *Attach Summary to Follow-up Task* indicator.

17.4.11 Add Products to Checklist Surveys During Runtime

When a sales representative is filling out a survey, they can add products to a product checklist survey by selecting *Add Products*.

17.4.12 Add Registered Products During Runtime

Registered products can be added to a survey during survey execution.

Extra registered products can be added to the survey on an ad hoc basis during execution.

17.5 Survey Reporting

Create reports using the data collected from your surveys to better understand your current performance and make improvements.

You can create different types of reports based on questions, answers, and other survey categories or simply export a single survey's results.

Survey Report Data Sources [page 820]
  Create reports for your survey results.

Export Survey Results [page 820]
  Export all results of a single survey for advanced reporting purposes.

Create Target Groups from Survey Reports [page 821]
  Use data from survey reports to create a new target group.

17.5.1 Survey Report Data Sources

Create reports for your survey results.

You can generate survey reports based on data sources such as question categories, answer categories, survey categories that you have defined in fine tuning or by the individual group or group of individuals who designed the survey. In the *Business Analytics* work center you can find the reports for surveys by searching for the prefixes `Visit Survey:` or `Business Partner Survey:`:

- Reports with the prefix `Visit Survey:` are the aggregated data about surveys used in visits.
- Reports with the prefix `Business Partner Survey:` are the aggregated data about accounts, contacts, and employees within satisfaction surveys.

The data sources for surveys include full text of questions and answers so you can create reports based on the exact questions and answers.

17.5.2 Export Survey Results

Export all results of a single survey for advanced reporting purposes.

Context

If you'd like to create a report based on the data collected from a single survey, use the export feature from within a specific survey. This feature exports all stored data from a single survey into an Excel spreadsheet for manual filtering or advanced reporting.

Procedure

1. From the *Surveys* work center, open a survey.
2. Navigate to the *Results* view and click *Export*. Your report will be downloaded as .csv file.

17.5.3 Create Target Groups from Survey Reports

Use data from survey reports to create a new target group.

You may find interesting patterns in your survey reports and want to take actions based upon your findings. For example, you might find many customers answered a satisfaction survey negatively during a certain time period and want to create a special promotion for these unsatisfied customers. You can create a target group directly from a survey report and then assign a promotion to that target group.

You can create target groups from the following survey reports:

- Business Partner Survey
  - Customer Satisfaction Answers
  - Net Promoter Score
- Visit Survey
  - Answers
  - Completion Rate and Score

18 Sales Campaigns

The key marketing capabilities in SAP Cloud for Customer are designed to help you convert marketing initiatives into sales opportunities. The scope involves creating target groups and campaigns, using surveys with embedded analytics, automated sales follow-ups, and monitoring key metrics. You can also use the integrated *Content* work center view to manage your marketing creative assets such as e-mail templates and external surveys.

Segmentation Using Target Groups

Marketing Strategy & Performance

Approval Workflows

Customer & Market Analytics

CAMPAIGNS

Channels

Third-Party Integration

Marketing Permissions

Mobile & Offline Availability
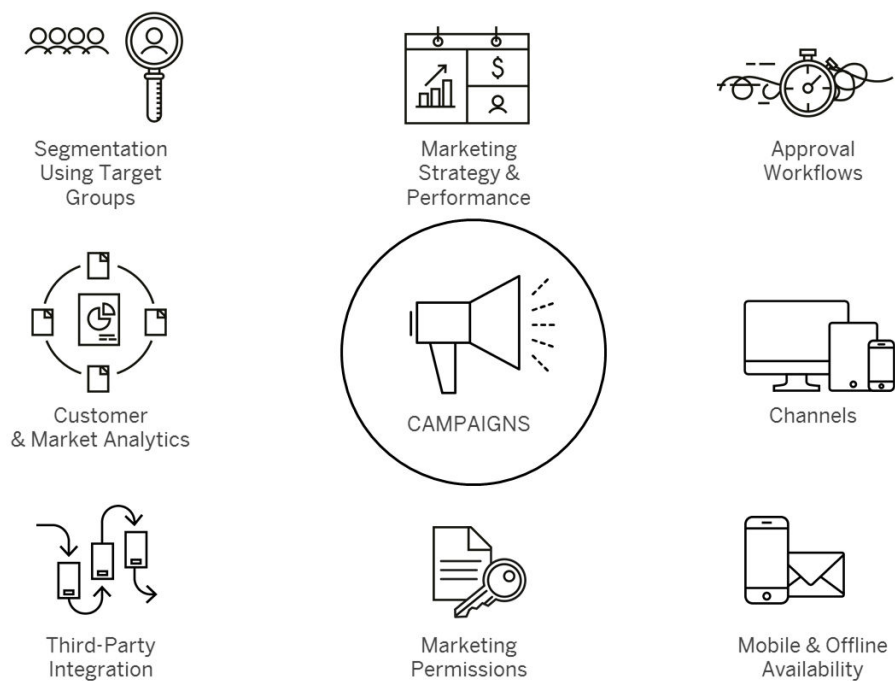
18.1 Scope and Configure Sales Campaigns

Administrators can configure sales campaigns using scoping, scoping questions, and fine-tuning activities.

Scoping questions and fine-tuning activities that are self-explanatory may not be included in this list.

18.1.1 Enable Sales Campaigns

Administrators can enable sales campaigns with a scoping question.

Go to ▐▶ *Business Configuration* ❯ *Implementation Projects* ▐ . Select your project and navigate to ▐▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales Campaign* ❯ *Campaign Management* ❯ *Campaign Execution* ▐ and select the checkbox.

18.1.2 Configure Target Groups for Sales Campaigns

Administrators can enable target groups with a scoping question.

Go to ▐▶ *Business Configuration* ❯ *Implementation Projects* ▐ . Select your project and navigate to ▐▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales Campaign* ❯ *Campaign Management* ❯ *Target Groups* ▐ and select the checkbox.

18.1.3 Configure Lead Scores for Sales Campaigns

Administrators can enable lead scores with a scoping question.

Go to ▐▶ *Business Configuration* ❯ *Implementation Projects* ▐ . Select your project and navigate to ▐▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales Campaign* ❯ *Enhanced Sales Campaign Functionalities* ▐ and select the checkbox.

18.1.4 Configure Marketing Permissions for Sales Campaigns

Administrators can enable the use of marketing permissions for sales campaigns with a scoping question.

Using marketing permissions, you can control the information and advertisements that are offered directly to your customers using e-mail, fax, or phone call.

Go to ▐▶ *Business Configuration* ❯ *Implementation Projects* ▐ . Select your project and navigate to ▐▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales Campaign* ❯ *Campaign Management* ❯ *Marketing Permission* ▐ and select the checkbox.

18.1.5 Configure Multistep Approval Process for Sales Campaigns

Administrators can enable the use of multistep approval process for sales campaigns.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◼. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales Campaign* ❯ *Campaign Management* ❯ *Campaign Execution* ◼ and select the checkbox next to the scoping question for multi-step approval.

18.1.6 Configure Sales Campaign Replications from SAP Marketing

Administrators can enable the campaign replication from SAP Marketing with scoping questions.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◼. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Communication and Information Exchange* ❯ *Integration with External Applications and Solutions* ❯ *Integration into Sales, Service, and Marketing Processes* ❯ *Campaigns* ◼ and select the checkboxs next to the campaign replication questions.

18.1.7 Configure Direct E-Mail to Target Groups for Sales Campaigns

Administrators can enable the use of direct e-mail to target groups for campaigns with a scoping question.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◼. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales Campaign* ❯ *Campaign Management* ❯ *Campaign Execution* ◼ and select the checkbox next to the scoping question for direct e-mail to target groups.

18.1.8 Configure SAP Marketing Permissions for Accounts and Contacts

Administrators can enable business users to view and edit SAP Marketing permissions for accounts and contacts with a scoping question.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◼. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Communication and Information Exchange* ❯ *Integration with External Applications and Solutions* ❯ *Integration of Master Data* ◼ and select the checkbox next to the question for marketing permissions and subscriptions information from an external application.

18.1.9 Configure Custom Communication Channels for Sales Campaigns

Administrators can configure custom communication channels for sales campaigns in fine-tuning activities.

Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Marketing Permissions* ❯ *Maintain Communication Channels* ❯ *Add Row* ▌and enter a *Communication Channel* and *Description*.

18.1.10 Configure Communication Categories for Sales Campaigns

Administrators can configure communication categories for sales campaigns in fine-tuning activities.

Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Marketing Permissions* ❯ *Maintain Communication Categories* ❯ *Add Row* ▌and enter a *Communication Category*, a *Description*, a *Contacting Limit*, and a *Time Frame*.

With the limit and time frame, you can specify how often a customer can be contacted during a certain period of time. When adding communication categories, we recommend starting with the letter Z.

18.1.11 Configure Sales Campaign Communication Channels for Countries/Regions with an Explicit Opt-In

Administrators can configure communication channels for countries/regions with an explicit opt-in in fine-tuning activities.

Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Marketing Permissions* ❯ *Maintain Communication Channels for Countries/Regions with an Explicit Opt-In* ❯ *Add Row* ▌and enter the *Country* or *Region* and the corresponding *Communication Channel*, such as e-mail, letter, or fax.

> ⚠ Caution
>
> It is the responsibility of your organization to comply with national legislation regarding data protection and the provision of marketing materials. Therefore, administrators must configure the solution for each country/region in which, or each customer with whom, your organization intends to conduct marketing activities and, to the extent legally required, store documents such as opt-in or opt-out.

18.1.12 Configure SMS Blasts for Sales Campaigns

Administrators can configure SMS blasts for campaigns via mashup web services.

Procedure

1. Request short codes and outbound endpoint from Gateway Provider.

   Outbound SMS Messages - Request your gateway provider to supply an endpoint URL for outbound SMS messages.

2. Go to ▶ *Administrator* ❯ *Mashup Web Services* ❯ to create the mashup web service for these outbound messages.

3. If you use SAP Mobile Services as the gateway provider, choose ▶ *New* ❯ *Rest Service* ❯.

   > **i Note**
   >
   > Other gateway providers may use a different type of service.

4. In the *General Information* area, enter the service name.

5. In the *Service Information* area, enter the required parameters based on the API properties of the gateway provider. It includes the outbound endpoint URL.

6. Make a note of the Service ID number that the system assigned to this service. This service ID is required when you set up your messaging channels.

7. Activate the service and save your changes.

18.1.13 Configure Messaging Channels for Sales Campaigns

Administrators can configure messaging channels for sales campaigns.

Go to ▶ *Administrator* ❯ *Sales & Campaign Settings* ❯ *Sales Campaign* ❯ *Messaging* ❯ and choose *New* to set up a new messaging channel.

18.1.14 Configure Direct E-Mail Sales Campaigns

Administrators can activate direct e-mail campaigns.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Open Activity List* ❯ *E-Mail and Fax Settings* ❯ *Activation of Mass E-Mail* ❯ and follow the instructions to enter your sub-domains.

18.1.15 Configure Sales Campaign Access Based on Sales Organization

Administrators can restrict access to sales campaigns based on the sales organization which the business user is in.

If a business user has access to a sales campaign but no access to see or edit sales campaigns in this sales organization, the sales campaigns are not visible for the business user.

To introduce access restrictions for sales campaigns in your solution, go to ▶ *Administrator* ❭ *General Settings* ❭ *Users* ❭ *Business Roles* ❭ and edit the business role of interest. On the subsequent screen, go to *Access Restrictions* tab and select the *Campaigns* work center view. Then define *Read Access* and *Write Access* as *Restricted* and provide the appropriate restrictions at the sales organization level.

> **i Note**
>
> Any change in the sales organization for a sales campaign takes one day to come into effect, hence the business user access will be available accordingly.

18.1.16 Configure Mashup for Editing SAP Marketing Permissions

Administrators can create a URL mashup that allows business users to edit SAP Marketing permissions.

Procedure

1. Go to ▶ *Administrator* ❭ *Mashup Authoring* ❭ .
2. Click ▶ *New* ❭ *URL Mashup* ❭ .
3. Under *General Information*, perform the following steps:
    1. Select *Without Port Binding* and under *Mashup Category*, add *Business & Finance*.
    2. Enter a *Mashup Name* that is used as the text for the link. For example: Edit Permissions and Subscriptions.
4. Under *URL Information*, perform the following steps:
    1. Enter a URL per the integrated SAP Marketing system in the following format:

> **⁂ Example**
>
> <protocol>://<server>:<port>/sap/bc/ui5_ui5/ui2/ushell/shells/abap/FioriLaunchpad.html
>
> #MarketingContact-displayFactSheet?
>
> InteractionContactID=<ID>
>
> &OriginID=<OriginID>

2. Click *Extract Parameters*.

3. Enter a HTTP method.

5. In the table under *Request Parameter*, remove the constant value for the *InteractionContactID* row and choose *InteractionContactID* under *Parameter Binding*.

6. *Save* and *Activate* the mashup.

7. Go to the *Marketing Permission* tab for the customer (account, contact, or individual customer) where you want to add your mashup.

8. Click your profile on the top right corner of your screen, and select *Start Adaptation*.

9. Click the blue icon . The system highlights the area with a red border to indicate that changes can be made.

10. In the side pane, click the reverse arrow icon to navigate to the *View*.

11. Click ▶ *Add* ▶ *Mashup* ▶ to open a new window.

12. Find the URL mashup you created and add the mashup. For more information on how to add mashups, see

13. To save your settings, click your profile and select *End Adaptation*.

Results

The link appears with your mashup title in the *General* area. The link opens the associated contact in the SAP Marketing system.

18.1.17 Configure Extension Field Conditions for Sales Campaign Target Groups

Administrators can configure extension field conditions for target groups.

Context

You can configure conditions for extension fields. However, the allowed selection criteria for member determination is the same in both dynamic and manual target group. For example, the set of attributes for which you can define conditions in the target group and the set of search fields in a static target group are the same.

Procedure

1. Click your profile on the top right corner of your screen, and select *Start Adaptation*.

2. Navigate to the screen where the extension field exists and click ✎ to select the relevant section. The system highlights the section with a red box.

3. In the side pane, click ❯ next to *Header* to see the list of available fields.

4. Navigate to the extension field and click ❯ next to it. The system highlights the extension field with a red box to indicate that it is editable.

5. Click *Edit*. The system opens the details for the field.

6. Navigate to the *Extension Scenarios* tab. The system displays the *Extension Scenarios* table with the list of available scenarios.

7. Click the **Edit** icon ✎ and the *Action* column appears in the tables.

8. Under *Action*, click the **Add Field** icon ＋ next to the *Account - General Information to Target Group - Account Selection* scenario. The system indicates that it has been added with a check sign in the *Field Added* column.

9. Click *Save*.

10. Add the extension field to the search screen of a static target group.

    a. Open a static target group (where the member determination is not configured).

    b. On the *Members* tab, choose ▸ *Add* ❯ *Add Accounts* ❯ .

    c. Add the extension field that you created for the account.

    > **i Note**
    >
    > If the extension field is not added to the search dialog, then the member determination does not work for the created extension fields.

11. Add the extension field to the conditions table.

    a. Open the dynamic target group where you want to maintain conditions for the extension fields.

    b. On the *Member Determination* tab, in the *Conditions for Accounts* table, select the extension field you created and apply your changes.

12. Click your profile and select *End Adaptation*.

    The process of configuring conditions for extension fields is similar for other member types (contacts and individual customers).

18.2   Use Target Groups for Sales Campaigns

Target groups are used to segment your market and to target the right customers or prospects for each campaign.

You can leverage the following solutions to create effective target groups:

• Filter target group members based on marketing attributes.

  > **i Note**
  >
  > You can extend the filter criteria for target group determination. For example, you can add additional fields for accounts or contacts to enhance the filter criteria.

• Upload target group members from MS excel.

- Create target groups from standard reports.
- Create or update target groups from account and contact data sets.
- Create target groups from analytical reports based on previous campaign responses.
- Create dynamic target groups using predefined custom conditions.
- Use Application Programming Interfaces (APIs) provided in the standard solution to integrate with third-party segmentation tools.

Create Target Groups for Sales Campaigns [page 830]
> Create effective target groups from your existing customer and prospect database leveraging marketing, sales, and service insights.

Create Dynamic Target Groups for Sales Campaigns [page 834]
> Create dynamic target groups that automatically update the members based on predefined conditions.

18.2.1 Create Target Groups for Sales Campaigns

Create effective target groups from your existing customer and prospect database leveraging marketing, sales, and service insights.

Create or update target groups with members from existing customer and prospect database, which can be filtered on different parameters including marketing attributes. Or create target groups from predelivered standard analytical reports. You can also define the target groups offline, based on marketing attributes and analytical reports (for example, campaign response details), and then upload them to your cloud solution.

18.2.1.1 Configure Target Groups for Sales Campaigns

Administrators can enable target groups with a scoping question.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* 〉. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Sales Campaign* 〉 *Campaign Management* 〉 *Target Groups* 〉 and select the checkbox.

18.2.1.2 Configure Extension Field Conditions for Sales Campaign Target Groups

Administrators can configure extension field conditions for target groups.

Context

You can configure conditions for extension fields. However, the allowed selection criteria for member determination is the same in both dynamic and manual target group. For example, the set of attributes for which you can define conditions in the target group and the set of search fields in a static target group are the same.

Procedure

1. Click your profile on the top right corner of your screen, and select *Start Adaptation*.

2. Navigate to the screen where the extension field exists and click ✐ to select the relevant section. The system highlights the section with a red box.

3. In the side pane, click 〉 next to *Header* to see the list of available fields.

4. Navigate to the extension field and click 〉 next to it. The system highlights the extension field with a red box to indicate that it is editable.

5. Click *Edit*. The system opens the details for the field.

6. Navigate to the *Extension Scenarios* tab. The system displays the *Extension Scenarios* table with the list of available scenarios.

7. Click the **Edit** icon ✐ and the *Action* column appears in the tables.

8. Under *Action*, click the **Add Field** icon ＋ next to the *Account - General Information to Target Group - Account Selection* scenario. The system indicates that it has been added with a check sign in the *Field Added* column.

9. Click *Save*.

10. Add the extension field to the search screen of a static target group.

    a. Open a static target group (where the member determination is not configured).

    b. On the *Members* tab, choose ▌ *Add* 〉 *Add Accounts* ▌.

    c. Add the extension field that you created for the account.

> **i Note**
>
> If the extension field is not added to the search dialog, then the member determination does not work for the created extension fields.

11. Add the extension field to the conditions table.

    a. Open the dynamic target group where you want to maintain conditions for the extension fields.

    b. On the *Member Determination* tab, in the *Conditions for Accounts* table, select the extension field you created and apply your changes.

12. Click your profile and select *End Adaptation*.

    The process of configuring conditions for extension fields is similar for other member types (contacts and individual customers).

18.2.1.3 Create Sales Campaign Target Groups from Data Groups

Create and update target groups from *Accounts*, *Contacts*, or *Individual Customers* work center view.

Context

Sales campaign administrators can create a target group and share the target group ID with the sales representatives who can then add their accounts to the target group.

> **i Note**
>
> Sales representatives can add members without directly accessing the target group.

Procedure

1. Go to ▌ *Customers* ❯ *Accounts* ▐ , *Contacts*, or *Individual Customers*, and choose the accounts or contacts that you want to add to the target group.
2. From the three dots menu, choose *Create Target Group* to create a new target group with the selected accounts or contacts. Or choose *Add Members to Target Group* to update an existing target group by adding the selected accounts or contacts.

18.2.1.4 Create Sales Campaign Target Groups from Target Groups Work Center View

Create target groups by directly searching and adding accounts, individual customers, contacts, targets groups, and leads to the target groups.

Context

In *Target Groups* work center view, you can directly search for accounts, individual customers, contacts, targets groups, and leads, and then add them to your target group. Use the standard or extension field based search parameters to add members to the target groups. You can also search members by marketing attributes and add them to the target group.

Procedure

1. Go to ⫸ *Sales Campaign* ❭ *Target Groups* ❭, and select the plus sign (+) to create a new target group.
2. Include basic details for your target group and choose *No* for *Member Determination*.

> **i** Note
>
> *Member Determination* is used when you create dynamic target groups.

3. Choose *Save and Open*.
4. Choose the pencil icon to edit your target group.
5. Go to *Members* tab, and then from *Add* context menu, add your target group members from *Accounts*, *Individual Customers*, *Contacts*, *Target Groups*, or *Leads*.
6. *Save* your target group.

18.2.1.5 Create Sales Campaign Target Groups from Microsoft Excel

Import target group members from external sources using Microsoft Excel.

Procedure

1. Go to *Target Groups* work center view under ⫸ *Sales Campaign* ❭ *Target Groups* ❭, and under the *More* menu, select *New from Microsoft Excel* ®.
2. In the *Import from Microsoft Excel* ® dialog , select a *Language* from the dropdown list and click *Download*.

   An excel template for creating new target group is downloaded.
3. In the downloaded file template, specify the member (account/contact/employee) IDs.

> **i** Note
>
> Note that you can only add IDs in the template. You will encounter an error during upload if you add member names to the template.

4. To be able to upload members, you must first login to your SAP system. To do this, go to the **SAP** tab and maintain the required credentials. This connection will allow you to create a new target group and upload members using the excel template.
5. Specify basic details for your target group and make sure to choose *No* for *Member Determination*.

> **i** Note
>
> System automatically uses *Member Determination* when you create dynamic target groups.

6. Choose *Save and Open*.

A target group with status *Active* is created. You will see that the *Members* tab in the detailed view shows the members added using the excel template..

7. If you want to upload members to an existing target group, open the detailed view for the target group and under ▌ *Actions* ❯ *Upload From File* ▐, click *Select file* to upload the .csv file you created in the previous step.

The accounts.contacts/employees in the .csv file are added to the target group under the *Members* tab.

18.2.1.6 Create Sales Campaign Target Groups from Analytics Reports

Create a target group from the member list of an analytics report.

Use the member list filter for analytics reports to create a list of members and add them directly to a target group. You can export accounts or contacts to a new target group from the following reports:

- **Accounts Contact Data**: The sales campaign administrator can slice and dice account contact data and create a target group from the report.
- **Accounts with Open Activities**: The sales campaign administrator can check for open activities or opportunities and create a target group.
- **Campaign Response Details**: This report lists all the responses provided by the members of a previous campaign. The contact and account data can be segmented based on different criteria. The contacts can then be exported into a new target group.

18.2.2 Create Dynamic Target Groups for Sales Campaigns

Create dynamic target groups that automatically update the members based on predefined conditions.

Context

Define dynamic target groups using conditions within the target group. Based on these conditions, the application determines the members and adds them automatically to the target group. You can schedule your target group to check its member list regularly to ensure that your target group is always up-to-date.

Procedure

1. Go to ▌ *Sales Campaign* ❯ *Target Groups* ▐ and select the plus sign (+) to create a new target group.
2. Include basic details for your target group and choose *Yes* for *Member Determination*.
3. Choose *Save and Open*.

   A dynamic target group with status *In Preparation* is created.

4. Choose the pencil icon to edit your target group.

5. On the *Member Determination* tab, in the *Schedule* area, choose either *Immediately* or *Date/Time* to check for and add members. Choose *Recurrence* and define the recurrence frequency if you want your target group to be updated periodically based on the predefined conditions.

6. Set your *Conditions for Acconts*, *Conditions for Account Contacts*, and *Conditions for Individual Accounts* to include contacts and accounts in your target group.

7. *Save* your target group.

8. Choose ▌▶ *Actions* ❭ *Activate* ❭ to initiate the member determination process that runs as a background job.

> **i Note**
>
> ○ On *Overview* tab, you can check the activation progress in the *Execution Status* area. On successful activation, the *Execution Status* changes to *Scheduled* and the *Status* of the target group changes to *Active*.
>
> ○ You can adjust the determination conditions any time during the member determination process. Choose ▌▶ *Actions* ❭ *Deactivate Schedule* ❭ to halt the determination process and the *Execution Status* is changed to *Not Started*. However, if the *Execution Status* is set to *Running*, the determination process cannot be halted. After you have done the change with the determination conditions, choose *Activate Schedule* to resume the determination process.

Example

You can create a dynamic target group for all accounts in Germany that belong to the industry segment manufacturing. The system adds all the accounts from Germany within industry segment - manufacturing to the group.

18.3 Decide Which Sales Campaign Communication Channel to Use

Communication channels determine how the customers can be contacted for a campaign.

Communication channel is crucial as it determines the complete execution process for a campaign. The standard solution supports the following communication channels. You can maintain only one communication channel for a campaign. However, if you have devised a multistep or multistage campaign, then you can use different channels for each of the triggers during the various stages of a campaign.

Direct Communication Channels of Sales Campaigns

Campaign Channel	Description
E-mail	Maintain an HTML template and upload it to ▶ *Sales Campaign* ❯ *Content* ◀. You can create survey templates or personalized e-mail templates for your campaigns.
Short Messaging Service (SMS)	Create messaging template in ▶ *Sales Campaign* ❯ *Content* ◀. Send SMS blasts to members of a target group and define the actions and triggers for the SMS campaigns that you can use for analyzing the campaign results.

> **i Note**
>
> Marketing permissions for a customer determine if a customer has given the consent to be contacted. Therefore, it is essential that the customers in a target group for a campaign have the necessary consent maintained in the master data for marketing permissions. You can find the *Marketing Permissions* tab in the master data for *Contacts* and *Individual Customers*.

18.3.1 Add Custom Communication Channels for Sales Campaigns

Add and define communication channels for Sales Campaigns.

The system comes with a standard set of communication channels: Fax, E-mail, SMS, and Telephone. You can add custom channels for additional social media outlets or communication tools based on the types of communication you use for your Campaigns.

18.3.1.1 Configure Marketing Permissions for Sales Campaigns

Administrators can enable the use of marketing permissions for sales campaigns with a scoping question.

Using marketing permissions, you can control the information and advertisements that are offered directly to your customers using e-mail, fax, or phone call.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◀. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales Campaign* ❯ *Campaign Management* ❯ *Marketing Permission* ◀ and select the checkbox.

18.3.1.2 Configure Custom Communication Channels for Sales Campaigns

Administrators can configure custom communication channels for sales campaigns in fine-tuning activities.

Go to ▶ *Business Configuration* ⟩ *Implementation Projects* ◀. Select your project and navigate to ▶ *Open Activity List* ⟩ *Fine-Tune* ⟩ *Marketing Permissions* ⟩ *Maintain Communication Channels* ⟩ *Add Row* ◀ and enter a *Communication Channel* and *Description*.

18.3.1.3 Configure Sales Campaign Communication Channels for Countries/Regions with an Explicit Opt-In

Administrators can configure communication channels for countries/regions with an explicit opt-in in fine-tuning activities.

Go to ▶ *Business Configuration* ⟩ *Implementation Projects* ◀. Select your project and navigate to ▶ *Open Activity List* ⟩ *Fine-Tune* ⟩ *Marketing Permissions* ⟩ *Maintain Communication Channels for Countries/Regions with an Explicit Opt-In* ⟩ *Add Row* ◀ and enter the *Country* or *Region* and the corresponding *Communication Channel*, such as e-mail, letter, or fax.

> ⚠ Caution
>
> It is the responsibility of your organization to comply with national legislation regarding data protection and the provision of marketing materials. Therefore, administrators must configure the solution for each country/region in which, or each customer with whom, your organization intends to conduct marketing activities and, to the extent legally required, store documents such as opt-in or opt-out.

18.3.1.4 Configure Communication Categories for Sales Campaigns

Administrators can configure communication categories for sales campaigns in fine-tuning activities.

Go to ▶ *Business Configuration* ⟩ *Implementation Projects* ◀. Select your project and navigate to ▶ *Open Activity List* ⟩ *Fine-Tune* ⟩ *Marketing Permissions* ⟩ *Maintain Communication Categories* ⟩ *Add Row* ◀ and enter a *Communication Category*, a *Description*, a *Contacting Limit*, and a *Time Frame*.

With the limit and time frame, you can specify how often a customer can be contacted during a certain period of time. When adding communication categories, we recommend starting with the letter Z.

18.3.1.5 Configure Sales Campaign Access Based on Sales Organization

Administrators can restrict access to sales campaigns based on the sales organization which the business user is in.

If a business user has access to a sales campaign but no access to see or edit sales campaigns in this sales organization, the sales campaigns are not visible for the business user.

To introduce access restrictions for sales campaigns in your solution, go to ▋▶ *Administrator* ❯ *General Settings* ❯ *Users* ❯ *Business Roles* ▋ and edit the business role of interest. On the subsequent screen, go to *Access Restrictions* tab and select the *Campaigns* work center view. Then define *Read Access* and *Write Access* as *Restricted* and provide the appropriate restrictions at the sales organization level.

> **i Note**
>
> Any change in the sales organization for a sales campaign takes one day to come into effect, hence the business user access will be available accordingly.

18.4 Create Sales Campaigns

You can create e-mail or SMS campaigns directly out of the system.

Go to ▋▶ *Sales Campaign* ❯ *Campaigns* ❯ *New* ▋ or ▋▶ *Target Groups* ❯ *Actions* ❯ *New Campaign* ▋ to create new sales campaigns.

Create E-Mail Sales Campaigns [page 838]
    Send personalized HTML e-mail messages directly from your cloud solution.

Use E-Mail Templates for Sales Campaigns [page 841]
    To send out personalized mass e-mail message to a target group, first create an HTML template with a desired layout, message texts, and placeholders for the various attributes to be personalized during campaign execution with the target group member attribute values.

Create SMS Sales Campaigns [page 846]
    Send personalized Short Messaging Service (SMS) directly from your cloud solution.

Create Multistep Sales Campaigns [page 847]
    You can create multistep sales campaigns based on triggers and actions.

18.4.1 Create E-Mail Sales Campaigns

Send personalized HTML e-mail messages directly from your cloud solution.

Each account or contact of the assigned target group and with a valid e-mail address, will receive personalized e-mail messages. You can also personalize the e-mail content and placeholders, such as the formatted name of

the account or contact. These placeholders will be filled with the information of the contacted account or contact when an e-mail is sent.

18.4.1.1 Configure Direct E-Mail Sales Campaigns

Administrators can activate direct e-mail campaigns.

Go to ▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▶ *Open Activity List* ❭ *E-Mail and Fax Settings* ❭ *Activation of Mass E-Mail* ❭ and follow the instructions to enter your sub-domains.

18.4.1.2 Configure Direct E-Mail to Target Groups for Sales Campaigns

Administrators can enable the use of direct e-mail to target groups for campaigns with a scoping question.

Go to ▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▶ *Edit Project Scope* ❭ *Questions* ❭ *Sales Campaign* ❭ *Campaign Management* ❭ *Campaign Execution* ❭ and select the checkbox next to the scoping question for direct e-mail to target groups.

18.4.1.3 Track Responses to E-Mail Sales Campaigns

Track hard and soft bounces as well as unsubscribe clicks for your e-mail campaigns.

The key response to an e-mail is whether the customers opened the e-mail, read and also clicked the enclosed hyperlinks for further information. You can check the response to the e-mail on the *Execution Details* tab of the specific e-mail campaign.

- **Hard Bounce**: A hard bounce can be defined as an undelivered e-mail for reasons such as an invalid e-mail address. In the event of a hard bounce, the outbound tracking record status for a campaign is updated and an appropriate reason (such as *Delivery Failed* or *E-Mail Address not Correct*) is set.

  > **i** Note
  >
  > If the reason *E-Mail Address not Correct* is set, then the flag *E-Mail Invalid* is automatically set for the corresponding contact. This is to avoid using the invalid e-mail address in any future campaigns. This information is also updated in the *Not Contacted* list on the *Execution Details* tab. In such a case, the reason column shows *Bounce: E-Mail Address is Invalid*.
  >
  > If such a hard-bounce of the e-mail occurred and the notification for the hard-bounce case has been enabled on the *Details* tab of the campaign, section *Bounced E-Mail*, the account owner will receive a BTM task/notification.
  >
  > If another e-mail is sent to the contact and the contact still has the *E-Mail Invalid* flag, no hard-bounce occurs because the e-mail address will be filtered out before sending the e-mail.

- **Soft Bounce**: A soft bounce response is set if an e-mail cannot be delivered for reasons such as the inbox is full, server is temporarily unavailable, or an out-of-office reply is set. The soft bounces are displayed as *Soft Bounce: Temporary not Available* in the *Not Contacted* list on the *Execution Details* tab.
- **Unsubscribe**: The recipient can unsubscribe by sending back a preconfigured e-mail to a certain e-mail address. The recipient will be removed from any future campaigns. The corresponding e-mail communication information for the recipient including e-mail and marketing permissions mail is updated in the master data as *Opt-Out*. To resubscribe the customer again, set the e-mail channel back to *Opt-In* on the *Marketing Permissions* tab of the contact, individual customer, or lead.

18.4.1.4 Include Employees in E-Mail Blasts for Sales Campaigns

Send e-mail blasts to members of a target group including employees.

Go to � *Sales Campaign* > *Target Groups* and select a target group. On the *E-Mail Blasts* tab, select an e-mail blast. On the *Overview* tab, choose *Yes* to *Include Employees*. Then, the e-mail blast will be sent to the target group members, such as accounts, individual customers, and contacts, as well as the employees listed on the *Employees* tab.

18.4.1.5 E-Mail Campaigns with Surveys or Follow-Up Leads

When you create an e-mail sales campaign with a survey, you must keep some things in mind.

Survey Link

As surveys can only be filled by persons, the link to a survey isn't rendered in an e-mail, when the recipient is a corporate account.

Check that your target group contains persons, such as individual customers or contacts. The e-mails sent to those recipients contain a correct link to the survey.

Follow-up Leads

When you're running a campaign with a lead creation as follow-up action, the system checks during lead creation, if there's already a lead in status *Open* or *Qualified* for the given customer and contact. If yes, the **lead isn't created**. The already existing lead does not necessarily have to have any reference to the checking campaign. But note, in case there exists a lead, for example, for contact B of account A, and now contact C of account A triggers a lead, the system creates a lead for contact C of account A.

18.4.2 Use E-Mail Templates for Sales Campaigns

To send out personalized mass e-mail message to a target group, first create an HTML template with a desired layout, message texts, and placeholders for the various attributes to be personalized during campaign execution with the target group member attribute values.

You can use any HTML editor to create this template, and then upload the HTML template to the campaign.

> **→ Recommendation**
>
> We recommend that you use an HTML text editor such as Microsoft Expression Web. Currently, HTML5 is not supported.

> **i Note**
>
> For the upload to work correctly, ensure that the following prerequisites are fulfilled:
>
> - HTML syntax of placeholders is correct.
> - Unsubscribe link is included (due to legal requirements).
> - HTML syntax is virus-free.
> - Save HTML templates with UTF-8 encoding. Templates saved with a different encoding result in upload errors.

18.4.2.1 Create E-Mail Templates for Sales Campaigns

You can create an HTML template offline or in your cloud solution.

Procedure

1. Create an HTML template in your local machine.
2. Go to ▶ *Sales Campaign* ❯ *Content* ❯ and choose ▶ *New* ❯ *E-Mail Template* ❯.
3. Enter the required information and choose *Save and Open*.
4. On the *Details* tab, choose ▶ *Add* ❯ *Upload* ❯ to select a template from your local machine.
5. Choose *Add* to finish the upload or choose *Add and New* to upload template in another language.
6. On the *Design* tab, you can edit the paragraphs with the tag `<div class="editable">` in the template if your system is set up to support it.

18.4.2.2 Create Sales Campaign E-Mail Templates for International Audiences

You can create e-mail templates for international audiences.

To create an e-mail template for international audiences, you first create separate e-mail templates in the required languages, and then upload these files in a single e-mail template instance in the system. During campaign execution, the language maintained in the contact header dynamically determines the language of the e-mail template.

18.4.2.3 Use HTML Header and Body for Sales Campaign E-Mail Templates

Follow the syntax described in this section to create e-mail templates.

HTML Header Section

To encode the file content in UTF-8, set the `META` tag in the header of the HTML source code as follows:

```
<meta content="text/html; charset=utf-8" http-equiv="Content-Type">
```

Example for HTML 4:

```
<meta content="text/html; charset=utf-8" http-equiv="Content-Type">
```

Example for HTML 5:

```
<meta charset=UTF-8" http-equiv="Content-Type">
```

HTML Body Section

If you use external hyperlinks in the HTML body with the `href` tag, these links are tracked automatically in direct e-mail campaigns.

You can edit the paragraphs with the tag `<div class="editable">` in the system if your system is set up to support it.

18.4.2.4 Create E-Mail Placeholders of Sales Campaigns

Follow the syntax in this section to create placeholders.

Enter the placeholders in the HTML within a `span` tag with the following syntax:

```
<span class="variable">
  /<ES name Data Type>/<ES name of element>
</span>
```

For example:

```
<span class="variable">
   /FormCampaignExecutionPlaceholder/Customer/FormattedName
</span>
```

You can enter the same placeholder several times in the HTML. During campaign execution, the value of the span tag is replaced by the corresponding value from the account or contact person that receives the e-mail message.

For example:

```
<span class="variable">
   Ms. Mary Valdez
</span>
```

→ Tip

- If your e-mail template contains images, store the images in a publicly accessible image server and referenced them in the template using the img tag.
- Include placeholders for accounts, contacts, and individual customers in your template. The system fills in the appropriate placeholder based on the item type of the target group member.

The following table shows the currently supported placeholders.

Placeholder	Contact Field (Account or Individual Customer)
/ FormCampaignExecutionPlaceholder/Customer/NameOrFirstName	Account: Name Individual Customer: First Name
/ FormCampaignExecutionPlaceholder/Customer/ AdditionalNameOrLastName	Account: Additional Name Individual Customer: Last Name
/ FormCampaignExecutionPlaceholder/Customer/FormattedName	Formatted name of the account or individual customer
/ FormCampaignExecutionPlaceholder/Customer/FormOfAddressName	Individual Customer: Title (for example: Mr. or Ms.)
/ FormCampaignExecutionPlaceholder/Customer/AcademicTitleName	Individual Customer: Academic title (for example: Dr. or Prof.)
/ FormCampaignExecutionPlaceholder/ContactPerson/FirstName	Account: First name of the contact person

Placeholder	Contact Field (Account or Individual Customer)
`/FormCampaignExecutionPlaceholder/ContactPerson/LastName`	Account: Last name of the contact person
`/FormCampaignExecutionPlaceholder/ContactPerson/FormattedName`	Account: Formatted name of the contact person
`/FormCampaignExecutionPlaceholder/ContactPerson/FormOfAddressName`	Account: Title of the contact person (for example: Mr. or Ms.)
`/FormCampaignExecutionPlaceholder/ContactPerson/AcademicTitleName`	Account: Academic title of the contact person (for example: Dr. or Prof.)
`/FormCampaignExecutionPlaceholder/ContactPerson/BusinessCardFunctionName`	Account: Function of the contact person from the business card (for example: Product Manager)
`/FormCampaignExecutionPlaceholder/ContactPerson/BusinessCardDepartmentName`	Account: Department name of the contact person from the business card (for example: Development)
`/FormCampaignExecutionPlaceholder/ResponseCodeID`	Response code ID generated for each member of the target group during the execution of the campaign

`/FormCampaignExecutionPlaceholder/Survey/SurveyID`	If your system is set up to support it, you can add satisfaction surveys to your e-mail templates:
	
	`<a href="https://{/FormCampaignExecutionPlaceholder/Survey/SurveyID}<ID of your survey>">any text</a>`
	
	For example:
	
	`<a href="https://{/FormCampaignExecutionPlaceholder/Survey/SurveyID}1234">Please complete a survey.</a>`

With the placeholders `/FormCampaignExecutionPlaceholder/MailingPermissionDenyMailToURI` or `/FormCampaignExecutionPlaceholder/SubscriptionLink/SubscriptionURI` in the template, the recipient can indicate to be removed from future mailings by either simply unsubscribe by e-mail or on an external landing page.

The placeholder `/FormCampaignExecutionPlaceholder/MailingPermissionDenyMailToURI` is used to create a MailTo link within the e-mail. It must be put inside the value of the `href` attribute of the anchor tag. If the placeholder is not added in the HTML file, it will be automatically added at the bottom of the HTML template.

When your customer clicks the link in the e-mail and sends back the unsubscribe e-mail, the system treats the unsubscribe e-mail automatically and changes in the contact master data the consent for channel *E-Mail* to *Opt-Out* on the *Marketing Permissions* tab.

> ⁂ Example
>
> ```
> <a href="mailto:{/FormCampaignExecutionPlaceholder/
> MailingPermissionDenyMailToURI}">Click here to be removed from future
> marketing mailings.</a>
> ```
>
> In the e-mail message, the anchor tag includes your return e-mail address and an ID code. For example:
>
> ```
> <a href="mailto:unsubscribe.marketing.mailing@asl-
> cust004.mail.dev.sapbydesign.com?
> subject=DenyMailingPermission6B7DF34541279407D4EFD1C24E6BC393867CDDA8">Click
> here to be removed from future marketing mailings.</a>
> ```

The placeholder `/FormCampaignExecutionPlaceholder/SubscriptionLink/SubscriptionURI` is used to identify one or more URLs within the template that point to a landing page provided by your own content management system (CMS) where the recipient of the personalized e-mail can subscribe or unsubscribe.

Please note that you have to conduct your CMS with the SAP Cloud for Customer system using a web service (A2X). For more information, go to the SAP Help Portal > *Integration* > *Web Service APIs* > *Manage Marketing Permissions*.

Please note that the current functionality does not pass any additional parameters to identify the recipients who click the link.

```
<href="http://{/FormCampaignExecutionPlaceholder/SubscriptionLink/
SubscriptionURI}your URL">any text of the link</a>
```

Here is an example of how it is used in an e-mail:

```
If you want to unsubscribe from this newsletter or if you want to subscribe to
additional newsletters, please click this <href="http://{/
FormCampaignExecutionPlaceholder/SubscriptionLink/SubscriptionURI}scn.sap.com/
user-preferences!input.jspa">link</a>.
```

Here is a code example for a simple e-mail template that you can use as starter for your own templates:

```
<html>
<head>
<meta content="text/html; charset=utf-8" http-equiv="Content-Type">
</head>
<body>
<span class="variable">/FormCampaignExecutionPlaceholder/ContactPerson/
FormattedName</span>
<p>Please join us for the conference!</p>
<p><a href="mailto:{/FormCampaignExecutionPlaceholder/
MailingPermissionDenyMailToURI}">Click here to be removed from future marketing
mailings.</a></p>
<p>If you want to unsubscribe from this newsletter or if you want to subscribe
for an additional one please click this <a href="http://{/
```

```
FormCampaignExecutionPlaceholder/SubscriptionLink/SubscriptionURI}scn.sap.com/
user-preferences!input.jspa">link</a></p>
<p><a href="http://www.sap.com/HANA">News about SAP HANA</a></p>
<div class="editable">
<p>This paragraph shall be editable in the editor.</p>
</div>
</body>
</html>
```

> i Note
>
> The unsubscribe link will override the Business Configuration that checks whether to unsubscribe at a channel level or category level and reflects the web services payload action.

18.4.2.5 Restrict Access to E-mail Templates of Sales Campaigns

You can restrict access to e-mail templates of sales campaigns.

Go to ▌▶ *Sales Campaign* ❯ *Content* ▐, you can upload e-mail templates and restrict access to the e-mail template objects by sales organization or service organization.

> i Note
>
> You define access restrictions for a combination of e-mail template and e-mail addresses, so you should have already defined the e-mail addresses as sub-domains in the fine-tuning.

Additionally, you can also define business role-specific access restrictions for the *Content* work center view to implement access control for e-mail templates.

18.4.3 Create SMS Sales Campaigns

Send personalized Short Messaging Service (SMS) directly from your cloud solution.

Send SMS blasts to members of a target group and define the actions and triggers for the SMS campaigns that you can use for analyzing the campaign results.

18.4.3.1 Configure SMS Blasts for Sales Campaigns

Administrators can configure SMS blasts for campaigns via mashup web services.

Procedure

1. Request short codes and outbound endpoint from Gateway Provider.

   Outbound SMS Messages - Request your gateway provider to supply an endpoint URL for outbound SMS messages.

2. Go to ▶ *Administrator* ❯ *Mashup Web Services* ❯ to create the mashup web service for these outbound messages.

3. If you use SAP Mobile Services as the gateway provider, choose ▶ *New* ❯ *Rest Service* ❯.

   > **i Note**
   >
   > Other gateway providers may use a different type of service.

4. In the *General Information* area, enter the service name.

5. In the *Service Information* area, enter the required parameters based on the API properties of the gateway provider. It includes the outbound endpoint URL.

6. Make a note of the Service ID number that the system assigned to this service. This service ID is required when you set up your messaging channels.

7. Activate the service and save your changes.

18.4.3.2 Configure Messaging Channels for Sales Campaigns

Administrators can configure messaging channels for sales campaigns.

Go to ▶ *Administrator* ❯ *Sales & Campaign Settings* ❯ *Sales Campaign* ❯ *Messaging* ❯ and choose *New* to set up a new messaging channel.

18.4.4 Create Multistep Sales Campaigns

You can create multistep sales campaigns based on triggers and actions.

Go to ▶ *Sales Campaign* ❯ *Campaigns* ❯ to open a campaign On the *Build* tab, you can add triggers and actions.

Triggers are the starting point where the system triggers an action. You can define the following triggers in your system.

Trigger	Explanation
Submitted Form	Trigger an action if the addressee submits a form back to your company.
E-Mail Interaction	Trigger an action if an addressee opens or replies to an e-mail or does not open or reply during a certain time frame.
Clicked Link	Trigger an action if the addressee clicks a hyperlink in an e-mail or does not click within a certain time frame.

Actions are follow-up activities for a specified trigger in the campaign. You can define the following actions in your system.

Action	Explanation
Send E-Mail	Send an e-mail directly from the system with the selected e-mail template to the addressees that correspond to the preset triggers.
Create Lead	Create a lead with a preset status assigned either to the selected employee directly or determined by lead routing rules.
	i Note
	When you're running a campaign with a lead creation as follow-up action, the system checks during lead creation, if there's already a lead in status *Open* or *Qualified* for the given customer and contact. If yes, the **lead isn't created**. The already existing lead does not necessarily have to have any reference to the checking campaign. But note, in case there exists a lead, for example, for contact B of account A, and now contact C of account A triggers a lead, the system creates a lead for contact C of account A.
Notify	Create a notification that triggers the selected employee.
Create Activity	Create either e-mail or phone call activities with a specified subject that are assigned to the account manager or employee.
Export List	Create a campaign where you get a file with the required data to handle the campaign externally.
Create Phone Call	Trigger mass phone call activity creation. This action creates one phone call activity per target group member during campaign execution.
Update Target Group	Update an existing target group based on the trigger defined in the campaign. For example, automatically add all members who submitted the survey to another target group. In this way, marketing administrator can execute multistage campaigns in your system.
Send SMS	Send an SMS to each member of the target group if the system is configured and integrated with a mobile gateway service (SAP Cloud for Customer offers out of box integration with SAP Mobile services).

> ❖ Example
>
> In the first step of the campaign, you can design a survey campaign to a larger target group to see who are interested in a new product which your organization is planning to launch. With the **Update Target Group** action, customers who submit the survey are automatically added to a new target group. You can then design another campaign to set up a call list for all interested participants and *Create Phone Call* activity for each responsible account owner to call the customers and invite them to a special product launch event.

18.4.4.1 Use Multistage Sales Campaigns

Build multistage campaigns to connect with the right customer, at the right time, through the right channel, with the right message.

Multistage campaigns are used in business scenarios where you want to:

- Reach out to various market segments through the different stages of a campaign.
- Trigger different actions based on customer interactions with your campaign content.
- Plan to allocate resources to different stages of a campaign.

> ❖ Example
>
> Let's say you are an automobile manufacturer and you want to launch a multistage campaign for current owners of an older model of a car you sell. You want to offer them a special deal to update to the latest model. You can set up a multistage campaign that sends an initial e-mail to all contacts in your records who have purchased the older model. If the recipients click the link in the e-mail saying they are interested, the system creates a new target group for them. This new target group is then moved on to the next stage in the campaign that is a phone call from a sales representative to offer a test drive of the new model. The system also creates phone call activity for each contact in the target group and assign it to a sales representative.

18.5 Manage Sales Campaigns

Manage sales campaigns in your SAP Cloud for Customer system or replicate them from SAP Marketing.

Assign Employees Responsible for Sales Campaigns [page 850]
    Use the *Employee Responsible* field for better organization and searchability.

Classify Sales Campaign Responses [page 850]
    Define how you classify campaign responses to enable follow-up sales activities.

Create Approval Processes for Sales Campaigns [page 851]
    Administrators can set approval processes that must occur to activate a campaign.

Mark Sales Campaigns as Obsolete [page 852]
    Set a sales campaign as *Obsolete* to make it unusable in all aspects of your system.

Integrate with SAP Marketing for Sales Campaign [page 852]

You can integrate your SAP Marketing with your SAP Cloud for Customer and manage your marketing campaigns in SAP Cloud for Customer.

18.5.1 Assign Employees Responsible for Sales Campaigns

Use the *Employee Responsible* field for better organization and searchability.

When you create a campaign, add an employee from your system as the *Employee Responsible* in the *details* area. It is easy to filter campaigns based on who is responsible for and track which employees are assigned to which campaigns.

18.5.2 Classify Sales Campaign Responses

Define how you classify campaign responses to enable follow-up sales activities.

> **i Note**
>
> To use response options, enable them using *Personalization*. Each response option can only be added once in a campaign.

Response options can be assigned a positive, negative, or neutral classification to be able to capture the customer sentiment or interest. The response options are saved with status *Active* and can be assigned to campaigns that have not been activated.

The response options are mainly used for giving any semantics to activities that are related to a campaign. If you defined a standard response option for a campaign, then this option is preset in the activity when you enter the related campaign. However, you can always change the option to another value later.

Currently there is reporting and user interface selection based on the response option. For leads and opportunities, we assume to have positive feedbacks already. Response options can only live with a campaign. When you set a response option to *Obsolete*, you cannot see it anymore in the value help and you cannot assign it to campaigns.

> **i Note**
>
> You can only assign response options to a campaign that has not been executed (in status *Planned*).

18.5.2.1 Create Sales Campaign Responses

You can create a new campaign response and assign it to campaigns which have not been activated.

Context

When creating a new response option, the classification field allows you to select, for example, all positive activities in reporting. When a campaign is assigned to an activity, there is a check, whether response options are assigned to this campaign.

If there is a default response option, this default displays in the newly created activity. You can change the response to another option assigned to the campaign later.

Procedure

1. Go to ▶ *Sales Campaign* ▶ *Response Options* ❯ to create a new response option.
2. Enter a *Description* for the response option and choose a *Classification*.
3. Save your entries.

   The response option is saved with the *Active* status and can be assigned to campaigns that have not been activated.

18.5.3 Create Approval Processes for Sales Campaigns

Administrators can set approval processes that must occur to activate a campaign.

Use the workflow approval process to exercise checks on campaign activation. You can use the multistep approval process to define these checks. When creating an approval process, you can specify a sales organization as the condition to trigger the approval process.

18.5.3.1 Configure Multistep Approval Process for Sales Campaigns

Administrators can enable the use of multistep approval process for sales campaigns.

Go to ▶ *Business Configuration* ▶ *Implementation Projects* ❯. Select your project and navigate to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales Campaign* ▶ *Campaign Management* ▶ *Campaign Execution* ❯ and select the checkbox next to the scoping question for multi-step approval.

18.5.4 Mark Sales Campaigns as Obsolete

Set a sales campaign as *Obsolete* to make it unusable in all aspects of your system.

Open a sales campaign and choose ▶ *Actions* 〉 *Set as Obsolete* 〉.

18.5.5 Integrate with SAP Marketing for Sales Campaign

You can integrate your SAP Marketing with your SAP Cloud for Customer and manage your marketing campaigns in SAP Cloud for Customer.

18.5.5.1 Configure Sales Campaign Replications from SAP Marketing

Administrators can enable the campaign replication from SAP Marketing with scoping questions.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* 〉. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Communication and Information Exchange* 〉 *Integration with External Applications and Solutions* 〉 *Integration into Sales, Service, and Marketing Processes* 〉 *Campaigns* 〉 and select the checkboxs next to the campaign replication questions.

18.5.5.2 Replicate Sales Campaigns from SAP Marketing

View your SAP Marketing campaigns in your SAP Cloud for Customer system.

If you use SAP Marketing to manage your marketing campaigns, you can replicate basic campaign data to your SAP Cloud for Customer. The basic header details are replicated from your SAP Marketing in real time as read-only data. Target group members are not replicated from SAP Marketing. Replicated campaigns are not enabled for approval within SAP Cloud for Customer.

Go to ▶ *Sales Campaign* 〉 *Campaigns* 〉 to find more details about campaigns replicated from SAP Marketing:

- The *Data Origin* column displays where the campaign was created so you can easily differentiate and sort by creation location.
- The *External Lifecycle Status* represents the SAP Marketing campaign status and can be viewed in the campaign details.

18.5.5.3 View Sales Campaign Replication Details

If you have replicated your SAP Marketing campaigns to SAP Cloud for Customer, you can view your replicated campaign details in the *Accounts*, *Contacts*, *Individual Customer*, and *Visits* details views.

When you open an account, contact, individual customer, or visit in the *Campaigns* view, you can see *External Campaigns*. Select an external campaign to see all marketing interactions from SAP Marketing in the *Interactions for External Campaign* area.

> **i Note**
>
> This feature is only available when online.

18.5.5.4 Configure SAP Marketing Permissions for Accounts and Contacts

Administrators can enable business users to view and edit SAP Marketing permissions for accounts and contacts with a scoping question.

Go to ▶ *Business Configuration* ▶ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Communication and Information Exchange* ▶ *Integration with External Applications and Solutions* ▶ *Integration of Master Data* ▶ and select the checkbox next to the question for marketing permissions and subscriptions information from an external application.

18.5.5.5 Configure Mashup for Editing SAP Marketing Permissions

Administrators can create a URL mashup that allows business users to edit SAP Marketing permissions.

Procedure

1. Go to ▶ *Administrator* ❯ *Mashup Authoring* ❯.

2. Click ▶ *New* ❯ *URL Mashup* ❯.

3. Under *General Information*, perform the following steps:

   1. Select *Without Port Binding* and under *Mashup Category*, add *Business & Finance*.
   2. Enter a *Mashup Name* that is used as the text for the link. For example: Edit Permissions and Subscriptions.

4. Under *URL Information*, perform the following steps:

   1. Enter a URL per the integrated SAP Marketing system in the following format:

      > ⁂ Example
      >
      > <protocol>://<server>:<port>/sap/bc/ui5_ui5/ui2/ushell/shells/abap/FioriLaunchpad.html
      >
      > #MarketingContact-displayFactSheet?
      >
      > InteractionContactID=<ID>
      >
      > &OriginID=<OriginID>

   2. Click *Extract Parameters*.
   3. Enter a HTTP method.

5. In the table under *Request Parameter*, remove the constant value for the *InteractionContactID* row and choose *InteractionContactID* under *Parameter Binding*.

6. *Save* and *Activate* the mashup.

7. Go to the *Marketing Permission* tab for the customer (account, contact, or individual customer) where you want to add your mashup.

8. Click your profile on the top right corner of your screen, and select *Start Adaptation*.

9. Click the blue icon 🖉 . The system highlights the area with a red border to indicate that changes can be made.

10. In the side pane, click the reverse arrow icon ← to navigate to the *View*.

11. Click ▶ *Add* ❯ *Mashup* ❯ to open a new window.

12. Find the URL mashup you created and add the mashup. For more information on how to add mashups, see

13. To save your settings, click your profile and select *End Adaptation*.

Results

The link appears with your mashup title in the *General* area. The link opens the associated contact in the SAP Marketing system.

18.5.5.6 Collaborate Across SAP Marketing and SAP Sales Cloud on SAP Jam for Sales Campaigns

SAP Marketing users and SAP Sales Cloud users can collaborate on campaigns through SAP Jam.

Create a Jam group in SAP Marketing and make it public so it can be seen in SAP Sales Cloud. Go to the *Groups* tab in a sales campaign to view the Jam group for your campaign. Groups must be created in SAP Marketing and not in SAP Sales Cloud for the replication to work.

> **i Note**
>
> Groups are not available for local campaigns.

18.6 Monitor and Analyze Sales Campaigns

Campaign analytics give you an insight into customer preferences and trends by allowing you to monitor your campaigns and responses.

You can also track the planned marketing budgets and actual marketing spend tied to campaigns. In the *Business Analytics* work center, you can access some out of the box reports such as the following:

- *Campaign Revenue Analysis*: Compares revenue generated from campaigns versus other sources.
- *Campaign Scorecard*: Compares leads and opportunities created from campaigns versus won opportunities.
- *Campaign Response Details*: Lists all the response options provided by the members of several campaigns. The contact and account data can be segmented based on different criteria. The contacts can then be exported into a new target group.
- *Campaign Tracking Status*: Shows the campaigns that are on track or behind schedule for the current quarter based on the campaign start date and the campaign status.

Example

If you have triggered an e-mail campaign to a target group, you can see the e-mail metrics on the *Results* tab of an open campaign. The system provides you with a graph of different data such as, number of e-mails sent, number of e-mails opened, number of unique clicks, number of hard bounces, and so on.

View Sales Campaign Results [page 856]

View analytics for your sales campaign results.

When you execute a campaign, the target group information for accounts, contacts, and individual customers are exported to a comma separated value (CSV) file compatible with Microsoft Excel.

18.6.1 View Sales Campaign Results

View analytics for your sales campaign results.

The campaign response metrics are displayed on the *Results* tab of an open campaign. View the results in graphical or in number metrics and classify the campaign results as positive, negative, or neutral.

Then determine the follow-up sales activities for your sales representatives. Some feature highlights are:

- Track campaign responses and provide visibility on marketing interactions to account owners.
- Turn campaign responses into sales opportunities and leads.
- Capture mass responses for a campaign using excel add-in.
- Create follow-up target groups based on campaign responses.
- Automatically update new target group based on survey response or link clicks for e-mail campaigns.
- Capture campaign response from contact details view.
- Embedded survey automation in campaigns using customized HTML e-mail templates.

18.6.2 Use Campaign File Formats for Sales Campaigns

When you execute a campaign, the target group information for accounts, contacts, and individual customers are exported to a comma separated value (CSV) file compatible with Microsoft Excel.

Prerequisites

Administrator activated Campaign Management with Campaign Execution in the scoping of your project.

Context

You can define one or more file formats for the CSV file that determines which information is exported and the order in which it appears in the file.

Procedure

1. Go to ▶ *Sales Campaign* > *Campaign File Formats* ▶ to create a new file format.
2. Enter a description and other needed information.
3. Choose *Save and Open*.
4. Move desired fields from the *Fields Available* table to the *Selected Fields* table and move the fields up or down in the table to change the order in which they appear in the exported file.
5. Save your changes.

18.7 Use Lead Scores for Sales Campaigns

Lead engagement scores can be used to help trigger actions when using sales campaigns for specific prospects.

Go to ▶ *Sales Campaign* > *Lead Scores* ▶, and then configure engagement scores for the corresponding consumer behavior patterns and define follow-up actions to ensure that sales teams focus on the most promising leads. For example, if an engagement score exceeds 70, marketing operations users can define the lead qualification level as hot.

Engagement score is a dimension of the lead score concept that reflects the behavior of customers and prospects in relation to whether they clicked a link, opened an e-mail, submitted a form, and so on. The engagement score is calculated based on marketing interactions between your company and your customer. For example, if you start an e-mail campaign, the system can analyze whether the customer has clicked hyperlinks in the sent out e-mail, responded by e-mail to your campaign, or unsubscribed for information by e-mail. Based on these interactions the score increases or decreases. You can find the engagement score in the contact data of an account as a value between 0 and 100.

Create Lead Scores for Sales Campaigns [page 857]
    Create lead scores by defining triggers and actions.

Activate Lead Scores for Sales Campaigns [page 858]
    Activate the lead score after you create it.

18.7.1 Create Lead Scores for Sales Campaigns

Create lead scores by defining triggers and actions.

Procedure

1. Go to ▶ *Sales Campaign* > *Lead Scores* ▶ to create a lead score.
2. Enter a *Name* for the lead score and choose *Save and Open*.

3. In the *Triggers* panel, choose an available trigger and specify the details.

4. In the *Actions* panel, choose an available action and specify the details.

   This action applies to the trigger you just specified.

5. *Apply* your triggers and actions.

6. Continue adding triggers and actions until you are satisfied with the workflow.

7. *Save* your entries.

18.7.1.1 Configure Lead Scores for Sales Campaigns

Administrators can enable lead scores with a scoping question.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* ❙. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Sales Campaign* 〉 *Enhanced Sales Campaign Functionalities* ❙ and select the checkbox.

18.7.1.2 Define Triggers and Actions for Sales Campaign Lead Scores

Define what customer behaviors trigger an action for lead scores.

You can define the followings as triggers in your system:

- Opened E-Mail: Trigger an action if the addressee opened or replied to the e-mail or has not opened or replied during a certain time frame.
- Submitted Form: Trigger an action if the addressee submitted a form back to your company.
- Clicked Link: Trigger an action if the addressee clicked a hyperlink in the e-mail or has not clicked within a certain time frame.
- Engagement Score: Trigger an action if the engagement score is within the defined range.

Actions are follow-up activities for a specified trigger in the campaign:

- Create Lead: Create a lead with a status, and assign an owner to it.
- Create Activity: Create an e-mail, phone call, or task with a subject and a note, and assign an owner to it.
- Set Lead Qualification Level: Define a lead as cold, warm, or hot based on the engagement score.
- Change Engagement Score: Increase or decrease the engagement score by a specific number of points.

18.7.2 Activate Lead Scores for Sales Campaigns

Activate the lead score after you create it.

Open an existing lead score and choose ▶ *Actions* 〉 *Activate* ❙. The triggers and actions you have defined in your lead score are applied. Only one lead score can be active at a time.

> **i Note**
>
> In addition to creating and activating lead scores, you can also deactivate, copy, and delete your lead scores from the *Actions* menu.

18.8   Sales Campaigns FAQ

Having trouble using Sales Campaigns? Check this list of questions and answers for help.

18.8.1 How can I prepare my target group member list for sales campaigns?

There are multiple possibilities to add members to target groups.

In addition to manually assigning members to a target group, you can also create dynamic target groups that will automatically update the members based on predefined conditions.

Related Information

Create Target Groups for Sales Campaigns [page 830]
Create Dynamic Target Groups for Sales Campaigns [page 834]

18.8.2 How can I create mass e-mail sales campaigns?

You can create an e-mail template and trigger a campaign to send out e-mails to all members in a target groups.

You can create an e-mail template in ▶ *Sales Campaign* ❯ *Content* ❯ and then use this template by triggering a campaign in ▶ *Sales Campaign* ❯ *Campaigns* ❯ .

18.8.3 What is the maximum number of e-mails that can be triggered in a single execution of an e-mail sales campaign?

We recommend that a target group of maximum 50,000 members to be used in a mass e-mail campaign for optimal performance.

18.8.4 Why does the sales campaign execution status remain in scheduled or running?

Once the campaign starts, the status will be updated by the system automatically. But there can be different reasons why this status update does not happen:

- Because of the high workload on the server, the campaign cannot be started at the planned start date and time. It will be started once the system has free resources.
- The campaign has been started but it failed. One reason, for example, can be a server shutdown. The status of the campaign is corrected automatically on a daily basis, which means the next day you should see that the status has been changed to *Failed*.

18.8.5 Why did a contact member disappear from the list of successfully contacted members in sales campaigns?

The system has created and sent a personalized e-mail to the mailbox of this member, but this mailbox does not exist.

The mail server received a so-called *Delivery Status Notification*. This notification is processed automatically and updated the campaign information of the *Contacted* list. The member has been moved to the list *Not Contacted* and a corresponding reason has been set. In addition, the indicator E-Mail Invalid has been set for the e-mail address of this member. You can see this indicator in the corresponding account or contact person master data. Here you can correct the email address and remove this indicator again. In a future campaign, this e-mail address would be used again and the campaign activation will send a personalized e-mail to this mailbox. If the indicator is not removed, a future campaign would filter out this e-mail address. It would appear in the *Not Contacted* list with a corresponding reason.

18.8.6 Why did the activation of the sales campaign end with status finished with errors?

The campaign has been started successfully, but it could not create and send all personalized e-mails.

As a result, the status of the campaign is set to *Finished with Errors*. One reason could be that the campaign execution was scheduled for a future date and time but the campaign was locked by another user at this date

and time. You can click the hyperlink of the execution status and open an application log with detailed messages. Analyze the messages and restart the failed campaign.

18.8.7 Why can't I create campaigns or change their status?

For some reason the scoping has been changed and the ability to create campaigns or change their status has been removed.

You must check out with your administrator and see, why the following question has been scoped:

Go to ▸ *Business Configuration* ▸ *Implementation Projects* ▸. Select your project and navigate to ▸ *Edit Project Scope* ▸ *Questions* ▸ *Communication and Information Exchange* ▸ *Integration with External Applications and Solutions* ▸ *Integration of Master Data* ▸ and under *Business Partners* and select the scoping question: *Do you want to query marketing permissions and subscriptions information from an external application to your cloud solution?*

The business option allows you to query marketing permissions and subscriptions from an external application or solution to your cloud solution.

When this business option is scoped, the following marketing functions are disabled in your cloud solution:

* Creating or activating campaigns
* Creating and editing marketing permissions
* Checking the addressability of target group members

Marketing permissions that already existed in your solution, can't be displayed in the *Account and Contact* view after this business option is scoped.

18.8.8 How are unique clicks and total clicks calculated in an e-mail campaign?

You want to analyze clicks in your e-mail campaigns.

Unique clicks are the number of individual recipients who clicked a link. If a recipient clicks any link in an email several times, these clicks are counted only once. You can view the table in the *Results* tab of the sales campaign to see on which link the unique or first click happened. The unique click rate is the percentage of unique clicks based on delivered messages.

Total clicks are the number of all clicks recorded in the e-mail including clicks that were made multiple times.

19   Promotions
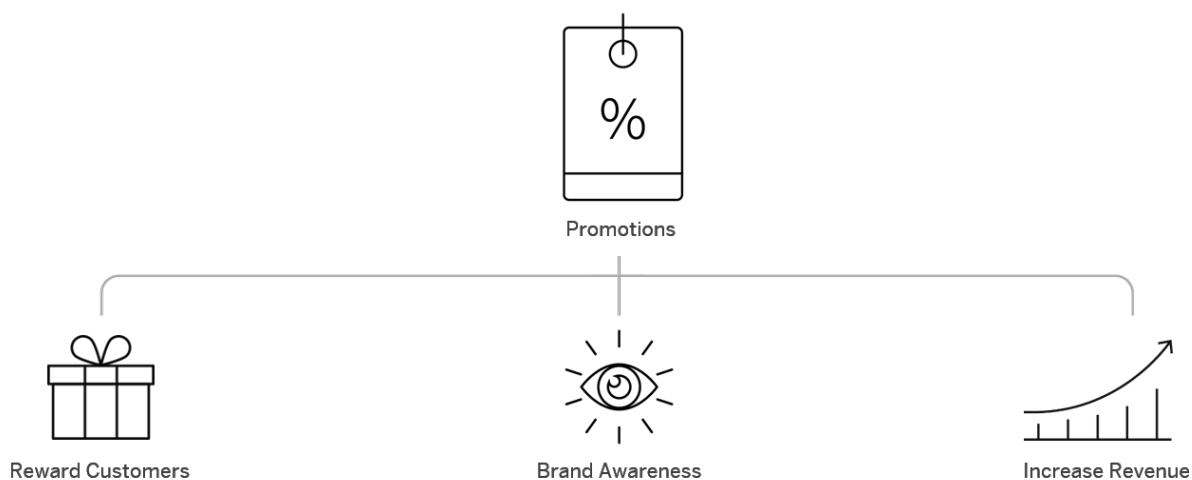
Use promotions to reward customer loyalty, create brand awareness, and increase revenue. Promotions can motivate your customer to buy larger quantities or add new products to an order that can help you meet your sales goals and objectives.

Create a promotion to show your customers your appreciation by offering a special deal on your most ordered products or to encourage customer to try the latest addition to your inventory. You can even add attachments like flyers and brochures to help illustrate your promotions.

When you are preparing for a customer visit, you can view the promotions available to that specific customer from the account or visit view. Then, when you are ready to take an order from the customer, you can add the promotional products right from the sales order screen. If your customer is interested in a specific product or if you are trying to sell a specific product, you can view available promotions for a specific product from the product tab.

19.1   Scope and Configure Promotions

19.1.1 Enable Promotions

To enable *Promotions*, administrators need to add them to your project scope.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* ◤. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Sales Campaign* 〉 *Promotion Management* 〉 *Promotions* ◤ and check the box.

19.1.2 Configure SAP CRM TPM Promotion Replication

Administrators can enable promotion replication from SAP CRM Trade Promotion Management (TPM).

Go to ▶ *Business Configuration* ▶ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales Campaign* ▶ *Promotion Management* ▶ *Promotions* ▶ and check the box for enabling promotions in integration scenarios.

19.2 Create Promotions

Create promotions in SAP Cloud for Customer or replicate them from SAP CRM Trade Promotion Management (TPM) to use them in your system.

Create Promotions in SAP Cloud for Customer [page 863]
> Create promotions directly in your SAP Cloud for Customer system.

SAP CRM TPM Promotion Replication [page 864]
> View SAP CRM Trade Promotion Management (TPM) promotions in your SAP Cloud for Customer system.

19.2.1 Create Promotions in SAP Cloud for Customer

Create promotions directly in your SAP Cloud for Customer system.

You can create promotions for an *Account*, *Hierarchy Node*, or *Target Groups* based on your needs.

> **i** Note
>
> Promotions created in SAP Cloud for Customer only exist in the SAP Cloud for Customer system and cannot be replicated to an external system.

19.2.1.1 Add Products to Promotions

Add products, product categories, or product groups to your promotions.

To add products to your promotions, you must select a *Product Planning Basis* under *General Information* for your promotion. Depending on your configuration, you can add a *Product*, *Product Category*, *Product Group* as well as combinations of these options from the menu. Once you have chosen an option here, you can add items to your promotion.

Add products to your promotion in the *Products* view by choosing *Add*. Depending on your system setup, you can also add *Product Groups* or *Product Categories* to your promotion. Specify the unit measurement and effective dates for the product. From the *Products* view, you can also add products that you'd like to exclude

from a promotion by checking the box in the *Exclude* column for a specific product. If you've accidentally added a product to the list, you can use the trashcan icon to remove it.

19.2.1.2 Involved and Excluded Parties in Promotions

Define the *Involved Parties* and *Excluded Parties* for your promotion.

For *Involved Parties*, you can assign different groups or individuals to different roles and include the business partners who are associated with the promotion.

Under *Excluded Parties*, choose which *Accounts* within the *Involved Parties* you'd like to exclude.

It is useful to assign larger groups as involved parties and then exclude specific groups or individuals when making a promotion available for many groups at once instead of adding each smaller group to the promotion one at a time.

19.2.1.3 Promotion Attachments

Add attachments such as brochures or links with more information about the promotion.

Select *Add* to add a *Local File*, *Web Link*, a file *From Library*, or *WebDAV* Document to your promotion.

19.2.1.4 Copy Existing Promotions

You can create a new promotion by making a copy of an existing promotion. Any promotion in your system, regardless of its *External Status*, can be copied to a new promotion. Give your promotion a new name and the following details get copied:

- *Account Type* and *Planning Account*
- *Involved Parties* and *Excluded Parties*
- *Products*, *Product Category*, and *Product Group* with the effective start and end dates
- *Attachments*

19.2.2 SAP CRM TPM Promotion Replication

View SAP CRM Trade Promotion Management (TPM) promotions in your SAP Cloud for Customer system.

All promotions replicated from SAP CRM TPM are read-only in your SAP Cloud for Customer system.

All valid promotions are downloaded based on business configurations and the criteria within the initial download report: `CRMPCD_PROMOTION_EXTRACT`.

> **i Note**
>
> Promotions created in SAP Cloud for Customer cannot be replicated to the back end CRM. Even if your system is integrated with SAP ERP, promotions created in SAP Cloud for Customer are standalone promotions in SAP Cloud for Customer only.

19.2.2.1 Configure SAP CRM TPM Promotion Replication

Administrators can enable promotion replication from SAP CRM Trade Promotion Management (TPM).

Go to ▶ *Business Configuration* ▷ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ▷ *Questions* ▷ *Sales Campaign* ▷ *Promotion Management* ▷ *Promotions* ▶ and check the box for enabling promotions in integration scenarios.

19.2.2.2 Trade Spend

View the trade spend associated with a promotion.

If your system is integrated with SAP CRM TPM, you can view your trade spend in SAP Cloud for Customer for an individual promotion.

19.3 Use Promotions

Capitalize on cross and up selling opportunities by knowing what promotions are available for accounts, visits, and products.

   View your promotions from within the sales campaign tab.

   Promotional products are applied within a sales order.

   When a promotion is finished, deactivate it in your system.

19.3.1 View Promotions

View your promotions from within the sales campaign tab.

Use the dropdown menu to choose which promotions to display then sort, search, and filter them to view specific results. Within your results, you can sort by *External Status*. This status determines the availability of the promotion to the sales team.

- *Created* - Once you create a promotion, the status is automatically set to *Created*. Created promotions show in the system, but won't be available to apply to a sales order.
- *Released* - When you are ready to activate your promotion, set the status to *Released*. Released promotions are available for your team members to apply.
- *Finished* - After the promotion has ended, set the status to *Finished*. You cannot edit a promotion after you have set the status to Finished, but you can copy it to create a similar promotion.

If you want to view promotions for specific *Accounts*, *Products*, *Visits*, and *Sales Orders*, choose the *Promotions* view from within the specific account or work center. Only the promotions linked to the account, product, visit, or sales order appear within each view.

19.3.1.1 Promotions Calendar

View *Promotions* in an easy to read calendar graphic.

The calendar view is available within the *Promotions* view under a specific *Account*, *Product*, and *Visit*. You can choose the *Month View*, *Quarter View*, or a *Selected Range* that you define. Horizontal colored bars in a chart view make it easy to view **Planned Dates**, **Buying Dates**, and **Actual Dates** for your promotions.

Promotion Dates

- **Buying Start** and **Buying End Dates** - During this time, the promotion is valid for customers.
- **Actual Date** - The actual date is when the orders made during the buying dates are executed.
- **Planned Date** - The planned dates span from the initial creation to the completion of the promotion.

> **i** Note
>
> Promotion calendar is currently available only in the SAP Fiori Client.

19.3.1.2 Promotions in Visits

View the promotions that are tied to a *Visit*.

Within the *Visit* tab, view current and valid promotions for the selected *Account*. You can also view the number of running and incoming promotions here.

19.3.1.3 Trade Spend

View the trade spend associated with a promotion.

If your system is integrated with SAP CRM TPM, you can view your trade spend in SAP Cloud for Customer for an individual promotion.

19.3.2 Apply Promotions in Sales Orders

Promotional products are applied within a sales order.

Procedure

1. When adding products to a sales order, select the *Promotions* tab to see the promotions available for the customer account.
2. Choose which products you'd like to add, enter a quantity, and add them to your sales order.
3. Save the order and retreive pricing. Once the sales order is saved, and sent to retrieve pricing, the promotional pricing gets applied.

   > i Note
   >
   > You only see promotions with *Released* status in the *Sales Order* tab.

19.3.2.1 Promotion Images in Sales Orders

You can assign an image to a promotion in SAP Cloud for Customer.

You can see the promotion image while adding a promotional product in a sales order. The image helps you to quickly identify a promotion and select the correct promotional product that you want to add to a sales order.

To assign an image to a promotion, go to the promotion, and click *Change Image*.

Promotion image in the quick add products screen of the sales order

Promotion image can be added/changed here
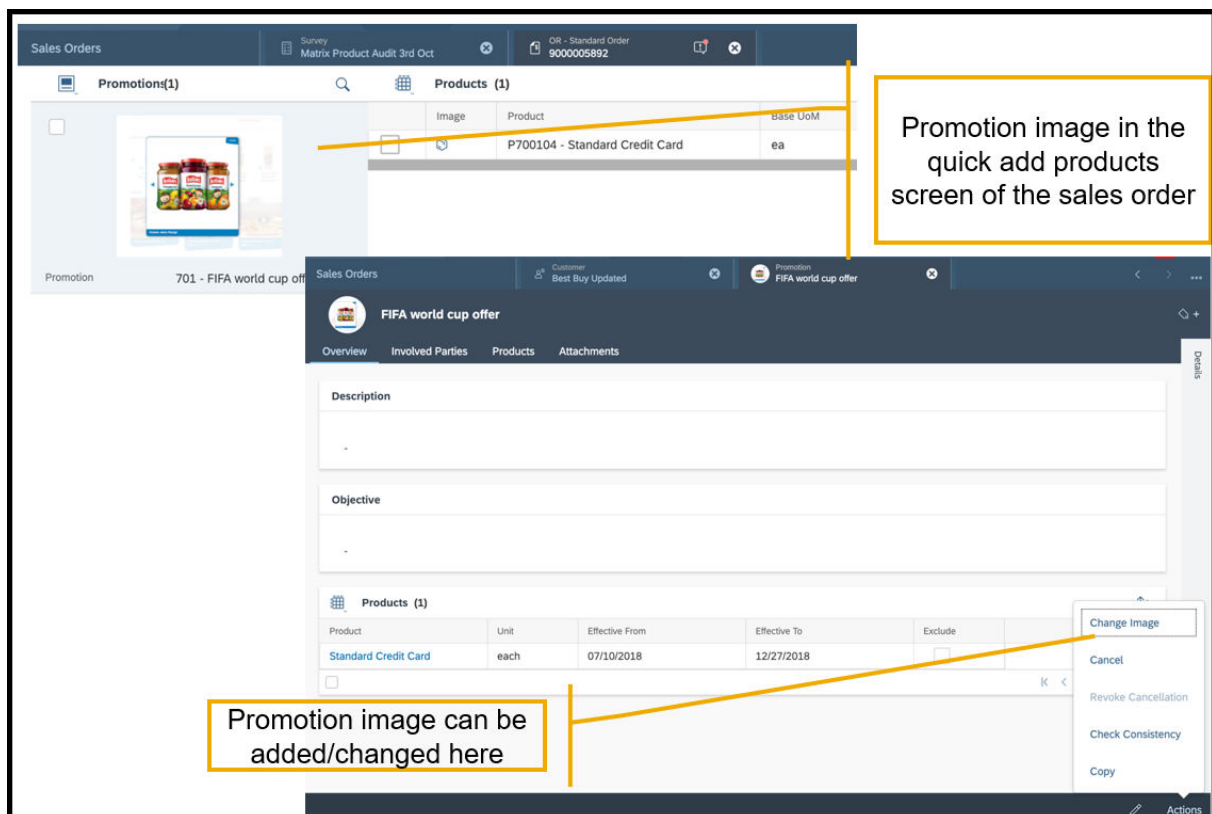
19.3.3 Finish Promotions

When a promotion is finished, deactivate it in your system.

When a promotion has ended and all promotional orders have been fulfilled, change the *External Status* to *Finished* to deactivate the promotion. You cannot edit a promotion after you have set the status to *Finished*, but you can copy the promotion.

19.4 Promotion Data Sources and Reports

Create reports and analyze your promotion data.

The following data sources are available for promotions:

CODCOIBTDB - BTD References for Sales Order Items – Promotional products can be part of the sales order. This BTD references can be used to analyze the promotional revenue from sales orders.

CODPRMHB - Promotions – This data source contains all the relevant data that would be required to analyze the promotions that are available.

CODPRMPCU - Product and Product Category in Promotions – This data source can be used with the above two data sources to analyze the promotions that are relevant for either a product or for a product category.

CODPRMPGB - Product Group in Promotions - This data source can be used with CODCOIBTDB, CODPRMHB to analyze the promotions that are relevant for a product group.

CODPRMPGU - Product and Product Group in Promotions - This data source can be used with CODCOIBTDB, CODPRMHB to analyze the promotions that are relevant for either a product or for a product group.

19.5 Promotions Offline

Information on field level availability of promotions in offline.

Promotions Offline

Tab	Section	Field	Create	Edit	Display	Edit* (Can edit diectly/via actions/via navigations
OVERVIEW	General Information					
		ID	N	N	Y	N
		Name	N	N	Y	N
		Type	N	N	Y	N
		Objective	N	N	Y	N
		Tactic	N	N	Y	N
		Account Type	N	N	Y	N
		Target Grou	N	N	Y	N
		External Status	N	N	Y	N
		Currency	N	N	Y	N
		Product Planning Basis	N	N	Y	N
		Plan Start Date	N	N	Y	N
		Plan End Date	N	N	Y	N
		Buying Start Date	N	N	Y	N
		Buying End Date	N	N	Y	N

Tab	Section	Field	Create	Edit	Display	Edit* (Can edit diectly/via actions/via navigations
		Priority	N	N	Y	N
		Employee Responsible	N	N	Y	N
		Sales Unit	N	N	Y	N
		Sales Organization	N	N	Y	N
		Distribution Channel	N	N	Y	N
		Division	N	N	Y	N
		Territory	N	N	Y	N
		Actual Start Date	N	N	Y	N
		Actual End Date	N	N	Y	N
	Notes	Notes	N	N	Y	N
	Description	Description	N	N	Y	N
	Objective	Objective	N	N	Y	N
	Products	Description	N	N	Y	N
		Unit	N	N	Y	N
		Effective From	N	N	Y	N
		Effective To	N	N	Y	N
		Exclude	N	N	Y	N
Involved Parties	Involved Parties					
		Role	N	N	Y	N
		Name	N	N	Y	N
		Action	N	N	Y	N
		Add	N	N	Y	N

Tab	Section	Field	Create	Edit	Display	Edit* (Can edit diectly/via actions/via navigations
		Actions	N	N	Y	N
Product and Product Categories	Product and Product Categories					
		Description	N	N	Y	N
		Unit	N	N	Y	N
		Effective From	N	N	Y	N
		Effective To	N	N	Y	N
		Exclude	N	N	Y	N
		Actions	N	N	Y	N
Attachments	Attachments					
		Title	N	N	Y	N
		Type	N	N	Y	N
		Changed On	N	N	Y	N
		Changed By	N	N	Y	N
		Actions	N	N	Y	N
Trade Spend	Trade Spend					

Promotions Offline Actions

Tab/Global	Section	Action	Offline Availability
Global		Refresh	Y

19.6 Promotions FAQ

Check out some of the frequently asked questions for promotions.

19.6.1 Can promotions from the backend on-premise CRM be replicated to this system?

Yes, promotions from the backend TPM/CRM system can be replicated to your SAP Cloud for Customer system. However, only the fields that are relevant for retail execution are available.

19.6.2 Can promotions be created in this system?

Yes, promotions can be created as stand-alone promotions in SAP Cloud for Customer, but cannot be replicated to any other system such as SAP ERP.

19.6.3 Are there any third-party software systems to integrate with SAP Cloud for Customer to replicate promotions?

No, it can only be integrated to TPM/CRM.

19.6.4 Can I do promotion planning and promotional claim and funds management in SAP Cloud for Customer?

No, both processes happen in the back end CRM.

19.6.5 Is promotional pricing replicated from SAP ERP to this system?

No, promotional pricing is not replicated from SAP ERP or stored in SAP Cloud for Customer. You'll need to retrieve pricing from your SAP ERP system after creating a Sales Order.

19.6.6 If I've already added customers to a promotion, can I remove some of them without removing all of them?

Yes, you can edit the list of *Involved* and *Excluded Parties* within each promotion.

Context

Once you create a promotion, and add a *Planning Account*, you can choose to add or remove additional parties.

Procedure

1. Open the *Promotion*.
2. Go to the *Excluded Party* view.
3. Check the box next to the customers that you'd like to temporarily remove from the promotion
4. Save your changes.

19.6.7 How can I see promotional pricing when taking orders?

After you have completed taking an order, retrieve pricing from SAP ERP to see the promotional prices. Promotional prices are not stored in SAP Cloud for Customer.

Context

Your system must be integrated with an external SAP ERP system to retrieve promotional pricing. Once you have created a sales quote or sales order, you can retrieve pricing.

Procedure

1. In your sales order or sales quote, open the *Products* view.
2. Use the *Actions* button and choose *Simulate*, *Transfer*, or *Finish* to retrieve pricing from SAP ERP.
3. View your adjusted pricing under *Product Pricing*.

20 Product Lists

Learn how the solution suggests products or products by product categories in sales or service transactions.

Product Lists with SAP Cloud for Customer offers your company flexible product proposals in sales transactions enabling users to streamline sales processes.
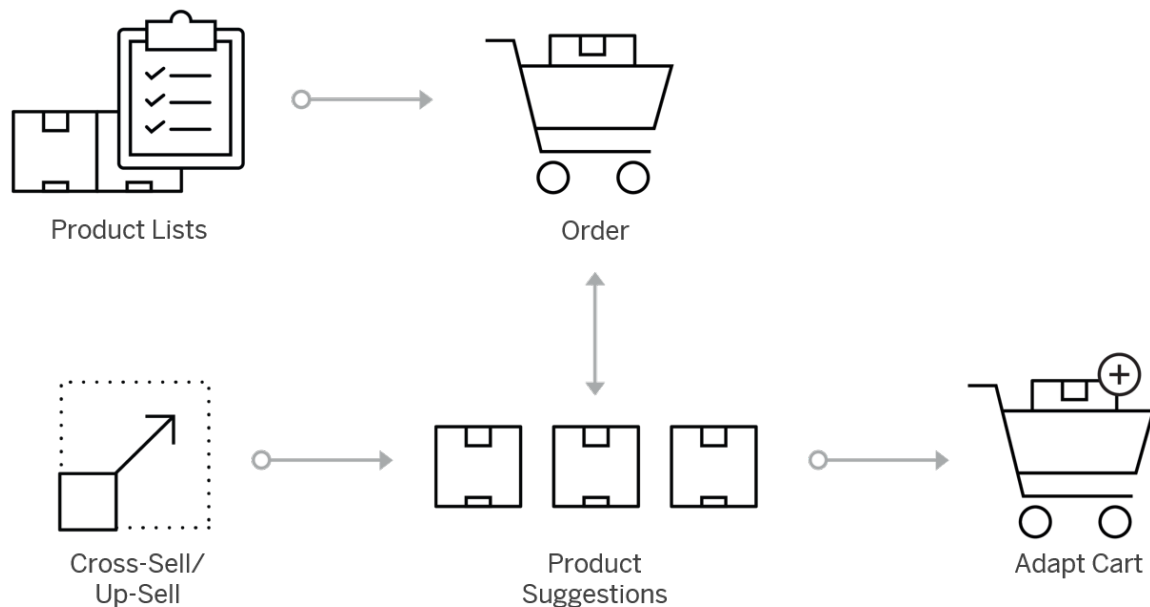
Administrators set up default products from product lists so that when users create sales transactions such as quotes or orders, proposed quantities are listed.

When users create quotes or orders, depending on the set-up, the solution suggests products depending on accounts, account hierarchy, sales area, target group, or territory. With the creation of certain product lists, users can quickly add products and related quantities for quotes or orders.

In addition, administrators can set up cross, up, or down-selling. Cross-selling offers proposed products that can be added to a required product in the sales document when the required product is part of the sales transaction. Up or down selling proposes products that replace a required product in the sales document when selected by the end user.

If your company would like to restrict or exclude product selections in sales transactions, administrators can set up in the solution as well.

Administrators add multiselect products from product lists in offline mode to the company sales transactions. Administrators can also use product lists in offline mode (extended tablet app).

20.1 Scope and Configure Product Lists

Administrators can use product lists when sales quotes or sales orders is scoped. In addition, there are product lists fine-tuning activities.

> → Recommendation
>
> We recommend that you review all the scoping questions in the areas that are relevant and that you have included in your scope. When you select a question, more information appears on the tabs in the details section of the screen.
>
> When you log on as an administrator, you can find the scoping questions under ▎▶ *Business Configuration* ▶ *Implementation Projects* ▎. Select your project and navigate to ▎▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *New Business* ▶ *Sales Orders* ▶ *Questions for Sales Orders* ▶ *Group: Product List for Sales Orders* ▎.

Scoping questions and fine-tuning activities that are straightforward may not be included in this list.

20.1.1 Enable Product Lists

To use product lists, administrators should ensure that sales orders or sales quotes are in scope.

Product lists enable you to suggest products or products by product category. You can also decide whether you want your sales team to use products list types or default products.

1. Go to ▎▶ *Business Configuration* ▶ *Implementation Projects* ▎. Select your project and navigate to ▎▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *New Business* ▶ *Sales Orders* ▎ and check the box.
2. Assign the *Product Lists* work center to the appropriate business roles.

> i Note
>
> To use product lists in offline mode, assign colleagues to the *Product Lists* tab.

20.1.2 Configure Product List Sequences

As an administrator, learn how to configure a sequence of the proposed products within a product list.

Add the products to sales quotes or sales orders in the same sequence represented in the product list.

1. Navigate to *Proposed Product* or *Proposed Product Categories*.
2. Click *Personalize* or *Adapt*.
3. Add the hidden field *Sequence*.
4. Go to ▎▶ *More* ▶ *Renumber* ▎ to edit your sequence.

> **→ Tip**
>
> Clicking *Renumber* defines in increments of ten (10). This action is helpful in cases when you later add products to another sequence.

5. Enter any numerical value in the *Sequence* column.
6. Save your entries and the system automatically reorders the list based on the number values in this column.

> **i Note**
>
> In the quote or order fast entry, products appear in reverse order. Added products display on the top row.

20.1.3 Configure Access Control for Product Lists

As an administrator, learn how to define access control restrictions for product lists.

Administrators can restrict access control to read and write access to the *Product Lists* enter tab.

1. To define access control for product lists, navigate to ▌ *Administrator* ❯ *General Settings* ❯ *Users* ❯ *Business Roles* ▌.
2. Click the *Business Role ID* for the user you want to change the access rights for.
3. Click ▌ *View All* ❯ *Access Restrictions* ▌ and highlight *COD_PRODUCTLIST_WCVIEW*.
4. In the *Read Access* row, select *Restricted*.
5. Under *Restriction Rule*, select *2 – Employee*.

After defining access control, users with the modified business role have product list selections in their transactions. This step eliminates the need to add the *Product Lists* tab to their business role.

> **i Note**
>
> If users work in offline mode using product lists, administrators should assign the product lists tab to those users.

20.1.4 Configure Product List Categories

Administrators can fine-tune product list categories.

1. Go to ▌ *Business Configuration* ❯ *Implementation Projects* ▌.
2. Select your project and navigate to ▌ *Open Activity List* ❯ *Fine-Tune* ❯ *All Activities* ▌.
3. Search for and open *Product List Categories*.
4. Click *Add Row*.
5. Enter a category ID and description.
6. Save your entries.

20.1.5 Configure Product List Determination Based on Requested Delivery Date

To determine product list based on requested date, follow these steps:

1. Navigate to ▎▶ *Business Configuration* ❯ *Overview* ❯ *Sales Quotes* ❯ *Maintain Document Types* ▌.
2. In the *Document Type* screen, select the document type that you want to change and under *Product Proposal Date*, select *Requested Date (Header)*.

When you select the specific *Document Type* during the quote creation process, the product list is determined based on the *Requested Date*.

20.1.6 Configure Product List Determination Based on Document Type

To determine product list based on document type based on sales quotes, sales orders, or opportunity, follow these steps:

1. Navigate to ▎▶ *Product* ❯ *Product List* ❯ *Sales* ▌.
2. Scroll down to *Document Type*.
3. To add a new document type, click *Add*.
4. In the *Document Type* window, select an option and click *Add*.
5. Click *Save*.

20.1.7 Configure the Default Product Quantity to Zero

Administrators can configure the product quantity default to zero (0) instead of one (1).

If no other proposed quantities are maintained, you can default the requested quantity is sales quotes and sales orders to zero (0). The configuration improves your usability in cases where order entry occurs mainly on mobile devices. The use of the business option is helpful when adjustments on requested order quantities are mainly changed using an increment counter on the user interface.

Navigate to ▎▶ *Business Configuration* ❯ *Scoping Element: Sales* ❯ *Sell Standard Products* ❯ *Product Quantity Default* ❯ *Do you want to change the product quantity default in sales documents from one to zero?* ▌

20.1.8 Configure Product Lists Based on Categories for Offline Use

Configure product lists based on product categories. In offline mode, users can access the product list with all products belonging to that product category.
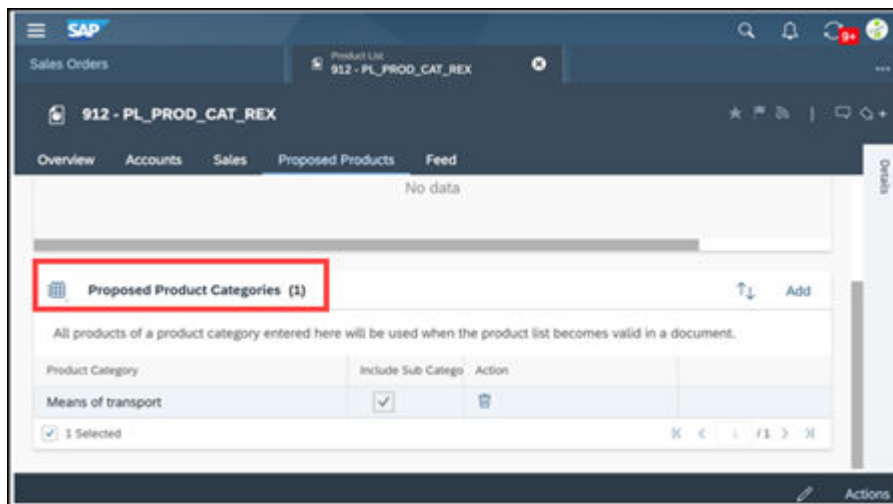
20.2 Maintain Product Lists

Administrators create, copy, and migrate product lists as well as set-up automatic product proposals.

The solution supports the following product lists types:

- *Product Proposal* - Define a validity for all accounts, individual customer assignments, sales areas, territories, or target groups. You can also create product proposals using product categories.
- *Cross/Up/Down Selling* - Define cross-sell, up-sell, or down-sell to recommend related products, more expensive products, or products that conform to a customer budget.
- *Product Exclusion* - Exclude products, product categories so that defined products from lists are not visible to users in sales transactions.
- *Product Restriction* - Restrict the selection for products and or product categories in sales transaction based on a restricted product list.

Create a Product List [page 879]
> Learn how to create product lists.

Use Automatic Product Proposals [page 881]
> Learn about automatic product proposals in product lists.

Migrate Product Lists [page 882]
> Learn about migrating product lists from external sources to SAP Cloud for Customer using migration templates.

Copy Product Lists [page 882]
> Learn how to save time and copy existing product lists.

Related Information

20.2.1 Create a Product List

Learn how to create product lists.

1. To create a product list, from the *Products* tab choose *Product Lists*, and select *New*.
2. Enter a description for the appropriate product list type and a validity period. In addition, decide whether the list is valid for all accounts and whether it is automatically proposed.

> **i Note**
>
> Mark *Valid for All Accounts* if the product list is valid for all customers, prospects, and individual customers.

> Mark *Automatic Proposal* if you want products to be automatically added to the sales document including the proposed product quantity.

3. Click *Save and Open*.
4. On the *Products* tab, add the products and enter a proposed quantity that end users enter automatically. For example, proposed products and quantities in a sales quote. Here you can also enter products with a specific validity period.

> → Tip
>
> Fields *Valid From* and *Valid To* may be personalized and hidden.

5. If the list is only valid for specific accounts or target groups, add them to the *Accounts* tab.

> i Note
>
> The Accounts tab disappears when the list is valid for all accounts.
>
> If you use accounts with hierarchies and you want to include them in the determination, subordinate accounts are also determined.

6. Narrow the determination by adding sales areas and sales territories on the *Sales* tab.

> → Remember
>
> The product list is determined if the sales document has the correct account, sales area, and sales territory maintained.

7. Save your product list and activate it from *Actions*.

When users create sales transactions, product lists assigned to their accounts, sales, areas, and territories are available.

> → Tip
>
> Personalize or adapt the advanced search screen for product lists to enable a search for hidden fields.

20.2.1.1 Configure Product List Sequences

As an administrator, learn how to configure a sequence of the proposed products within a product list.

Add the products to sales quotes or sales orders in the same sequence represented in the product list.

1. Navigate to *Proposed Product* or *Proposed Product Categories*.
2. Click *Personalize* or *Adapt*.
3. Add the hidden field *Sequence*.
4. Go to ‖ *More* ⟩ *Renumber* ⟩ to edit your sequence.

> → Tip
>
> Clicking *Renumber* defines in increments of ten (10). This action is helpful in cases when you later add products to another sequence.

5. Enter any numerical value in the *Sequence* column.
6. Save your entries and the system automatically reorders the list based on the number values in this column.

> **i Note**
>
> In the quote or order fast entry, products appear in reverse order. Added products display on the top row.

20.2.1.2 Configure Access Control for Product Lists

As an administrator, learn how to define access control restrictions for product lists.

Administrators can restrict access control to read and write access to the *Product Lists* enter tab.

1. To define access control for product lists, navigate to ▌▶ *Administrator* ❭ *General Settings* ❭ *Users* ❭ *Business Roles* ❭.
2. Click the *Business Role ID* for the user you want to change the access rights for.
3. Click ▌▶ *View All* ❭ *Access Restrictions* ❭ and highlight *COD_PRODUCTLIST_WCVIEW*.
4. In the *Read Access* row, select *Restricted*.
5. Under *Restriction Rule*, select *2 – Employee*.

After defining access control, users with the modified business role have product list selections in their transactions. This step eliminates the need to add the *Product Lists* tab to their business role.

> **i Note**
>
> If users work in offline mode using product lists, administrators should assign the product lists tab to those users.

20.2.2 Use Automatic Product Proposals

Learn about automatic product proposals in product lists.

When your administrator creates products and defines *Automatic Proposal* when creating new product lists, products are automatically added to the sales document including the proposed product quantity.

Automatic proposals are defined per validity for all accounts or based on individual customers (including account hierarchy) assignments. In addition, sales areas, territories, and target groups can be defined in automatic proposals .

When users create sales transactions such as quotes, products may be automatically defaulted. For example, product catalogs, product catalogs would be included in the quote transaction.

> **i Note**
>
> You can assign products to a sales order or sales quote based on a restricted product list. When you unblock the restricted *Product List*, the system proposes only the products in the restricted product list

during the quote creation process. You can select and edit product proposals derived from a restricted product list.

20.2.3 Migrate Product Lists

Learn about migrating product lists from external sources to SAP Cloud for Customer using migration templates.

Administrators upload data into their system such as product lists by using the migration tool. Download the required templates, enter the necessary data into them, and follow the steps to import the product list data to your system.

Alternatively, you can upload product lists and other business objects using the Data Workbench.

20.2.4 Copy Product Lists

Learn how to save time and copy existing product lists.

To copy a product list, from *Products*, choose the *Product Lists* tab to open the list you want to copy. Then, click ▶ *Actions* 〉 *Copy* ◀ . All details of the original product list are copied over and you can edit the new list details, such the product list name and its products.

20.2.5 Use Validity for Product Lists

Explore how the maintained product lists validity affects product lists.

Several types of validity can be created when working with product lists:

- *Valid for All Accounts* - Selecting this checkbox means that the product list is valid for all customers, prospects, and individual customers.
- *Valid From* - The created product list is available once the administrator activates it.
- *Valid To* - The product list is no longer available after the display date. There is also a validity on proposed product lists, which should be within the header validity range.

20.2.6 Product List Categories

Learn about using and defining the proposed products to be selected based on product list category (including its hierarchy).

Product categories include detailed information about goods your company produces or sells. For example, the product name, and product ID.

Product categories are used to organize the products you company sells. For example, if you sell boilers, your categories might be combi boilers, heat only boilers, or system boilers. If you company only sells one product type such as computer keyboards, you could create product categories for laptops, gaming, ergonomic keyboards.

20.2.6.1 Use Product List Categories

Relevant for administrators or key users, fine-tuning is required to define the product list category. The category can be used to define which list should be copied to a survey.

> i Note
>
> If the *Category* field is not displayed, you can add it to the *New Product List* screen by navigating to *Personalize* or *Adapt*.

> → Tip
>
> Product list categories have no correlation to product categories in the product master.

20.2.6.2 Configure Product List Categories

Administrators can fine-tune product list categories.

1. Go to ‖▶ *Business Configuration* ❯ *Implementation Projects* ❯.
2. Select your project and navigate to ‖▶ *Open Activity List* ❯ *Fine-Tune* ❯ *All Activities* ❯.
3. Search for and open *Product List Categories*.
4. Click *Add Row*.
5. Enter a category ID and description.
6. Save your entries.

20.2.7 Define Product List Queries

Learn how to define an advanced product list search query, for example, by sales organization, distribution channel, or division.

1. Navigate to ‖▶ *Products* ❯ *Product Lists* ❯.
2. Select to *Personalize* or *Adapt*.
3. Click the sections until the plus (+) add field sign appears to add the desired fields.
4. Select the desired fields to be included in your defined product list search query.
5. Click *Save Query* and exit from *Personalize* or *Adapt*.

> → Tip
>
> You can use product list queries to distribute product lists to offline clients.

20.2.8 Use Advanced Search for Product List Fields

Personalize or adapt the advanced search screen for product lists to enable a search for hidden fields.

20.2.9 Simultaneously Search and Add Products or Accounts

From *Product Lists*, concurrently search for a product and add it if it does not already exist in the table.

The feature also applies to accounts. If an account does not already exist, you can concurrently search for it and add it to the list.

> **i** Note
>
> You cannot disable the feature in the key user tool.

20.2.10 Implement BAdIs for Product Lists

Learn about the product list BAdI which allows you to narrow down the product lists determination result.

The BAdI *ProductBusinessPartnerRelationDeterminationFilter* is based on additional attributes defined on product list header by its own implementation.

> **i** Note
>
> Product list BAdIs cannot be used in offline mode.

20.2.11 Add External Product IDs to External Systems

Learn about adding external fields to the *Proposed Products* tab.

1. Navigate to ▮▶ *Products* ❯ *Product Lists* ▮.
2. Open a product list to edit.
3. Select to *Personalize* or *Adapt*.
4. Click the *Valid To* section until the plus (add field) sign appears.
5. Click the plus sign and add the following fields:
   - *External Product ID* - The ID from external systems such as SAP ERP is displayed.
   - *External System* - The name from external systems such as SAP ERP is displayed.

20.2.12 Copy and Paste Account and Products Mass Entries in Product Lists

You can copy items from Excel using the copy and paste function in product lists.

This task allows you to quickly paste accounts and products to a product lists. Ensure that the copied data exactly matches the order of columns in the user interface so that the combined fields represent two columns.

1. Open a product list.
2. Go to the *Accounts* or *Products* of the product list.
3. Click the *Paste* icon and the paste field appears.
4. Click in the *Paste supported data, such as Excel* field.
5. Use your keyboard paste function, such as Ctrl + V (or Shift + Insert) to paste the data in the field.

> i Note
>
> The number of input fields should not exceed the maximum number of exposed fields.

20.2.13 Mass Update Product Lists

You can reduce time with a mass update of products assignments without configuration by their administrator.

Mass update product assignments such as, *Proposed Products*, *Restricted Products*, *Excluded Products*.

1. Click *Actions*.
2. Go to the *Product Lists*.
3. 2. Select the *Product Lists* that need updating.

   > i Note
   >
   > For *Product Lists* that need replacing, filter by *Product ID*.

4. Select one of the following:
   o *Add Product* - Perform a mass product update from the *Products* tab for all selected product lists.
   o *Update Product* - Perform a mass product update from the *Products* tab for all selected product lists. You can modify the validity or replace it with another product.
   o *Remove Product* - Perform a mass removal of products from the *Products* tab for all selected product lists.

20.2.14 Use List View to Select and Remove Products from Product Lists

Remove selected products from a product list.

Use the list view to select the products and then use the *Remove* option under the *Actions* menu to remove products.

20.3 Add Quick Products from Product Lists to Sales Quotes

Learn how to quickly add products and related quantities to sales quotes or sales orders using the action *Product Lists*.

Procedure

1. Open or create a sales quote or sales order.

2. Click *Quick Create*. Alternatively, you can add quick products from the quote or order from ▶ *Actions* ❯ *More* ❯.

3. Click ▶ *Actions* ❯ *More* ❯.

4. Add products from the defined product lists.

   When your administrator maintains *Product Lists*, you can multiselect products based on defined proposals that depend on:
   - Target groups
   - Accounts
   - Account hierarchy
   - Sales data
   - Territory

   You can also copy and paste products to list using *External ID*.

   Use Cross, Up, and Down Selling [page 886]
   Learn how the solution uses cross selling to display proposed products to users when creating sales transactions.

20.3.1 Use Cross, Up, and Down Selling

Learn how the solution uses cross selling to display proposed products to users when creating sales transactions.

Cross, up, and down selling offers proposed products, which can be added to a sales document when selected by the user.

When sales quotes include required products from the list, users see a list of related products, product upgrades, or economical products in the sales transactions.

1. If you use cross-sell products, to the sales quote or sales order, navigate to *Recommended Products* on the *Products* tab.

   > **i Note**
   >
   > The *Recommended Products* tab is only visible if your administrator has defined cross-selling. Up and down-selling is indicated using an action. Clicking the action allows you to select and exchange the product. For quotes, you can add the product as an alternative item.

2. Click ▌ *Action* ❯ *Up/Down Selling Products* ▐ .

> **i** Note
>
> The *Up/Down Selling Products* field indicates that users can replace the product to use up or down-sell. The icon only appears if your administrator has defined the applicable product proposals.

3. Enter the desired quantities.
4. Save your entries and continue processing the sales quote.

20.3.1.1 Create Product Lists for Cross, Up, and Down Selling

Learn how to create cross, up, or down selling product lists types, allowing users to select from those products in a sales quote or sales order.

1. Navigate to ▌ *Products* ❯ *Product Lists* ❯ *New* ▐ .
2. Select the *Personalize* or *Adapt* menu to modify the screen layout.
3. Click the plus sign (+) to add the *Type* field and save your changes.
4. Exit the personalization or adaptation mode.
5. Select the product proposal *Type* such as up, down or cross.
6. Add products by clicking ▌ *Proposed Products* ❯ *Add* ▐ and enter a product name or ID.

> **i** Note
>
> In the newly created product list, the *Required Products* tab appears. For other product lists types, addition tabs may also appear. For example, the *Excluded Products* tab appears when creating new product exclusion list types.

7. Choose the type of desired proposed products, for example, *Cross Selling*, *Down Selling*, *Up Selling*.

20.3.1.2 Recommend Products for Cross, Up, and down Selling

Add products to an opportunity from proposed product recommendations.

You can add products to your opportunities from proposed product recommendations for cross selling. Up and down selling is supported by using an action that proposes - up or down sell products to replace the selected product.

Under *Recommend Product from Cross Selling Product Lists*, add cross sell products to the opportunity products by selecting the plus (+) icon.

If you have already defined product lists that include up- and down sell products in sales quotes and sales orders, the action to replace a product is also displayed in the opportunity.

> **i** Note
>
> Add *Recommend Product from Cross Selling Product Lists* from *Adaptation* mode.

20.4 Define Exclusions and Restrictions for Product Lists

Administrators can learn about defining product lists types, which exclude and restrict the selection of products and product categories in sales transactions.

You can also determine product lists based on requested date and *Document Type* for sales quotes and sales orders.

20.4.1 Configure Product Exclusions

Administrators can exclude products or product categories from a product list selection. Products from those lists are not visible to users in the product list item selection in sales transactions.

> ❖ Example
>
> For a certain territory or sales area, certain products are not being sold. These products can be excluded by a product list

When the list type *Product Exclusion* is created, the *Excluded Product* tab appears. Administrators can add exclude products in sales transactions.

Exclude products, product categories or both from a product list selection. Products from those lists are not visible in the product list item selection in a sales transaction. Users receive an error message stating `Product <ID> not valid; it is excluded by at least one product list.`

Use this function by selecting*Product Exclusion* from the *Type* list.

20.4.2 Configure Product Restrictions

Administrators can restrict products or product categories from a restricted product list. Users can only add products to sales transactions from those lists.

When the list type *Product Restrictions* is created, the *Restricted Product* tab appears. Administrators can restrict the desired product in sales transactions.

Restrict the selection for products, product categories in sales transaction based on a restricted product list. Only products from those lists are allowed to be added to a sales transaction. In addition, products from those lists can only be added to a sales transaction. If a product is selected outside a valid restricted product list, users receive an error message stating `Product <ID> not valid; it is not allowed (restricted by product list).`

Use this function by selecting *Product Restriction* from the *Type* list.

20.4.3 Configure Product List Determination Based on Requested Delivery Date

To determine product list based on requested date, follow these steps:

1. Navigate to ▍▶ *Business Configuration* ❯ *Overview* ❯ *Sales Quotes* ❯ *Maintain Document Types* ❯.
2. In the *Document Type* screen, select the document type that you want to change and under *Product Proposal Date*, select *Requested Date (Header)*.

When you select the specific *Document Type* during the quote creation process, the product list is determined based on the *Requested Date*.

20.4.4 Configure Product List Determination Based on Document Type

To determine product list based on document type based on sales quotes, sales orders, or opportunity, follow these steps:

1. Navigate to ▍▶ *Product* ❯ *Product List* ❯ *Sales* ❯.
2. Scroll down to *Document Type*.
3. To add a new document type, click *Add*.
4. In the *Document Type* window, select an option and click *Add*.
5. Click *Save*.

20.5 Use Product Lists Feed

Learn about the product list feed, which allows you to follow product lists that are relevant to you.

When an administrator creates product lists, an action appears in the product list feed displayed in *Feed* or within the product list on the *Feed* tab.

Users can view feed product list changes by using the follow action.

20.6 Use Product Lists Change History

Learn about viewing product list modifications.

Users assigned to product lists can track product list modifications by adding the *Changes* tab to the *Product List* tab.

Go to ▍▶ *Personalize* ❯ *Start Personalization* ❯ and click *Add Tab* to make the *Changes* tab visible.

Search for changes by filtering the following change history fields:

- *Changes Made From*
- *Changes Made To*
- *Attribute*
- *Changed By User*

20.7 Use Product Lists Offline

Learn about working with product lists in offline mode.

You can add multiselect products from product lists in offline mode to your sales transactions.

> i Note
>
> If users work in offline mode using product lists, administrators should assign the product lists tab to those users.

My Accounts Product Lists Query

You can select the query *My Accounts Product Lists* to download product lists for offline use. The query includes the following product lists:

- Valid for all accounts assigned to account hierarchies belonging to *My Accounts* (from the *Account Team* and or *Territory Team*).
- Assigned to target groups including *My Accounts*.
- Assigned to a territory belonging to *Territory* (including sub-territories).

An administrator can configure this setting by navigating to ▮ *Administrator* ❯ *General Settings: Offline Settings* ▮.

> i Note
>
> The *My Account's Product Lists* query is not available for online selection.

21 Pricing

SAP Cloud for Customer helps you stay competitive by allowing you to easily apply flexible internal, external, and offline pricing discounts.
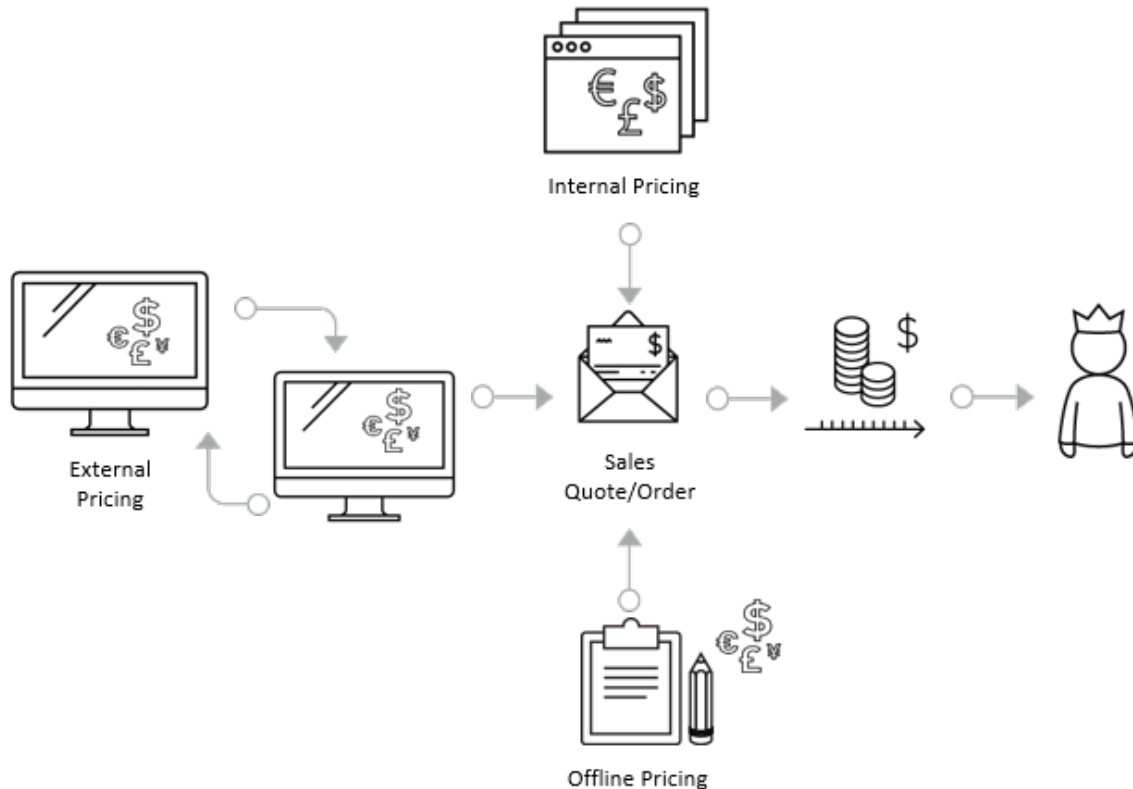
You can offer competitive pricing to your customers when working with sales quotes and sales orders. As prerequisites, your administrator has preconfigured product price lists or your price determination in transactions is based on price master data derived from an external SAP system. You can manually apply discounts and miscellaneous surcharges to sales quotes and orders. You can overwrite certain pricing elements, which makes pricing more flexible.

Here's an overview of the SAP Cloud for Customer solution pricing types:

Internal Pricing – The solution offers internal net pricing. It is used if your company derives pricing from price lists or discount lists based on the solution master data. Internal pricing takes prices from the price list created by your administrator and can include optional predefined discounts. Depending on the solution set-up, users can apply various types of discounts, for example, to the total value or product item.

External Pricing – External pricing can be used for companies that retrieve their complete price information including tax details from an external SAP system. End-users request pricing via a user action to retrieve the external pricing result and apply discounts or other price elements if necessary. Also, your administrator can use the solution to determine credit limits and product availability information from this user action.

Offline Pricing – If your company has the SAP Cloud for Customer, you can use offline pricing . In offline mode, you can calculate an estimated price value including a fixed or percentage based discount for your quotes and order items created in offline. Sync the discount details when you are working online again. You can also view the external pricing result in offline mode.

21.1 Work with Internal Pricing

Learn the basics on how SAP Cloud for Customer internal pricing works including how to apply discounts to sales quotes and sales orders.

21.1.1 Internal Pricing in Sales Quotes and Orders

Learn about internal pricing for sales quotes and orders.

SAP Cloud for Customer provides various internal price elements in the sales quotes and sales orders. From the *Products* tab of table view of the sales quote or sales order, the most important price information is displayed and can be easily overwritten depending on how your solution is configured. Below find the details on how to apply the elements as well as a description of them.

21.1.1.1 Apply Internal Pricing Discounts to Sales Quotes and Sales Orders

Learn how to apply the pricing discounts from the *header* view or item view of sales quotes and orders.

Context

Every product or service you have entered in the sales quote or order has its own line item number. From the line item you see the line item number, product ID, description, price, quantity, discount, and more depending on your solution set-up.

Procedure

1. Open one of your sales quotes or sales orders, or create a new one.
2. From the *Products* tab view of the sales quote, click *Edit*.
3. Overwrite the list price line item or the line item discount and click *Update Pricing*.
4. You can also modify the *Overall Discount (%)* from the *header* view.
5. Save your changes.

21.1.1.2 Apply Detailed Pricing Elements to Sales Quotes and Sales Orders

Learn how to apply discounts and surcharges to the sales quote and sales orders line items.

Context

When viewing a sales quote from the *Pricing* tab, which is where detailed pricing can be viewed and modified, there are two sections:

- *Item Pricing* – You can view and update pricing details for selected line items. Expand an item to see all its relevant price components. If input fields are grayed out such as *Tax*, they cannot be edited. In addition, other price elements such as surcharges can be added to a line item.

  > **i Note**
  >
  > The solution does not currently offer tax determination with internal pricing.

- *Total Pricing* - You can view and update pricing details for the entire document. In addition, some other price elements can be added here, such as Overall Discount (%).

> **i Note**
>
> If a sales team is working on a specific sales quote, depending on their role, your administrator can maintain access restrictions so that designated team members have the ability to modify the pricing details or just view them. In addition, many pricing updates may be displayed in the *Feed* depending on your solution set-up.

21.1.1.3 Modify and Update Pricing Elements

Learn how to modify and update pricing elements.

Context

You can add sales quote price components for each line item.

Procedure

1. Open the sales quote or create a new one.
2. Navigate to the *Pricing* tab of the sales quote.
3. Click *Item Pricing*, select the line item, and click *Expand*.
4. Click *Add Row*, select the desired pricing component, and change the description if desired.
5. Click *Update Pricing*, select *Completely* or *Keep Manual Changes*.

> **i** Note
>
> If you click *Completely* the solution also deletes manual adjustments made by the user. By clicking *Keep Manual Changes* the solution will keep edits done manually. The flag *Manually Changed* will be selected.

6. Save your changes.
7. To view the pricing details in the output form, click *Preview*.

21.1.2 Quantity and Currency Conversions

Learn about currency and quantity conversions and how they affect the sales quote pricing calculation.

During the price calculation, currency conversion occurs if the currency of the price master data differs from the document currency, depending on the exchange rates maintained as master data. The document currency is defaulted from the account master sales data or from the selling company data.

In addition, during the price calculation, quantity conversion occurs if the unit of measure requested in the document differs from the price unit maintained in the price list. A prerequisite is that the quantity conversions are maintained in the product master data.

Example

A product master data maintains a quantity conversion "1 pallet = 20 each", the price list specifies a price unit of "50 USD/1 each", and the sales quote requests 5 pallets - in this case, the 5 pallets are converted to 100 units and price is calculated at 5000 USD.

21.2 Internal Pricing FAQs

Having trouble using internal pricing? Check this list of questions and answers for help.

21.2.1 Are there descriptions for the internal pricing lists?

Yes, to gain a basic understanding of price lists and how the solution sequentially applies them, see the text below.

As an end-user, you don't need to worry about how the solution applies the discounts and surcharges from the price lists. It is important to understand the basics of how price lists work in order for you to better comprehend the solution's pricing.

Your administrator creates list prices for products and services which are managed in *Price Lists*. These lists are maintained, have a validity period, and need to be released before they are active and optionally can require approval.

Once the price lists are released and end-users begin to create sales quotes, the system will look at the following to determine the correct pricing a customer should receive:

Main Price Element: List Price

The system determines the net list price of a product or service. In addition, the system will check all price lists that fit the parameters passed from the sales or service document such as customer, sales organization, product, product category, and posting date.

Main Price Element: Product Discount (%)

Your administrator centrally defines and manages discounts. As an end-user, it is helpful to know that to determine the product discounts for a product or service, the system checks all discount lists that fit the parameters passed from the sales document such as customer, customer group, product, product category and pricing date.

Unlike the list price calculation, in the *Product Discount (%)*, once all discounts have been calculated and applied, all relevant product discounts will be considered in the price calculation.

> **i Note**
>
> SAP Cloud for Customer supports discounts in percentage, no fixed discount lists. (Discounted are always the discounted values, for example,. List Price = 100 USD, 1st discount 10% = 10 USD, 2nd discount 10% = 9 USD, 3rd discount 10% = 8,10 USD).

21.2.2 What do the internal pricing elements mean?

The contents below will provide a high-level overview of internal pricing and price elements in the solution.

As a general rule, the internal net pricing depends on the price master data your Administrator has maintained in the *Products* work center. This includes a mandatory price list, optional discount lists, freight, and

surcharges. All of these components determine the price your customers will need to pay for a product or service.

There are various types of price lists including base price, distribution chain specific, and customer specific. Your Administrator will maintain these lists for your company, so you as an end-user don't need to worry about them. In addition, there are discount lists which will also be maintained by your Administrator. The discount lists include an overall customer group, overall customer, customer product specific, and customer product category specific.

Keep in mind, the way your Administrator will configure your solution determines if the discounts and price lists are applicable to your customer.

The table below provides a description of the main price elements an end-user can manually apply to sales quotes or sales order.

You can find the following fields under ▐▶ *Sales Quote* ❯ *Pricing* ❯ *Edit* ◀▌.

Main Price Elements Description

Field Name	Description	Explanation
List Price	Price lists (created by your company Administrator) can be customer specific, distribution chain specific, and base price lists.	For customers that may be entitled to special prices, the system first checks for a customer-specific price list. If there is no customer-specific price found, then it checks for a distribution chain specific price list. Finally, if there is no distribution-chain-specific price, it checks for the base price list.
Product Discount (%)	To determine the discount, the system checks all discount lists that fit the parameters passed from the sales or service documents. All found discounts are considered in the price calculation. Types of discount lists include: Customer Specific Discount Product, General Customer Discount, Overall Customer Group Discount, and Customer Specific Discount Product Category discount lists.	For customers that may have a special discount for a certain product, the system checks for a discount list with customer product discounts.

Field Name	Description	Explanation
Overall Discount (%)	The overall discount (%) is an additional general discount applied to the total item net value and must be applied manually.	

> → Tip
>
> Once the discounts and/or surcharges are applied, you can apply on *Overall Discount (%)* This is an additional general discount applied to the total item net value which you as an end-user must apply manually. To apply the overall discount navigate to the ▶ *Sales Quote (or and sales orders)* ❯ *Pricing* ❯ *Edit* ❯ header view or *Total Pricing* section and enter the desired percentage (&) discount.

The following table displays the set of price components that may display depending on your solution's configuration. Menu paths are for the SAP Cloud for Customer, Edge edition unless otherwise noted in the table.

You can find the following fields under ▶ *Sales Quote* ❯ *Pricing* ❯ *Edit* ❯ *Add Row* ❯.

Additional Price Elements Description

Field Name	Description	Explanation
Cost and Profit Margin	Only displayed if your profit margin has been configured in your solution. A cost estimate can be manually entered and makes the calculation of the profit margin possible.	
Freight	This price element covers the freight amount entered manually. This price condition is only available if activated via business configuration. Price master data view is not available in the solution.	
Quality Loss Fee	This price element can be used and renamed to define a fixed discount amount for each product in the sales quote.	

Field Name	Description	Explanation
Restocking	This price element can be used and renamed to define a fixed discount amount for the complete sales quote.	
Rounding Difference	This is a value that has been lost or gained through rounding. This value is used only for currencies that do not have low denomination coins such as 1 or 2 Cents – for example, Swiss francs. In this case, the price must be rounded to the nearest available value, such as 0 Cents or 5 Cents.	
Scales	Your Administrator can define scales for prices in the price master data which depend on different quantities. The scale you use determines how values are calculated.	You can use a scale to define that a single boiler costs 500 USD. However, if you buy at least 10 boilers the price decreases to only 450 USD per unit.
Surcharge	Two different price components are available for surcharges. You can define surcharges as percentages or fixed amounts according to your needs. All surcharges can be used side by side.	
Total Given Discounts	This is calculated by adding all the relevant discounts given. This value cannot be edited directly by the user, but can be applied by editing the product discounts or header discount.	
Total Item Net Value	Calculated by adding all the item net values and cannot be edited.	

Field Name	Description	Explanation
Total Net Value	This is calculated by adding all the item net values plus freight and cannot be edited.	
Total	Calculated by adding the total net value.	This is the total price that will appear on the output form.

As an end-user you probably won't have write access to the *Products* work center or the pricing master data, because of your business role. You will though, be able to view the pricing elements of a sales quote and sales order and apply various discount types and surcharges to them depending on your solution set-up.

21.2.3 How do I adapt pricing in sales quotes and sales orders?

Only your administrator can assure that price master data is maintained since a product price is mandatory. An Administrator can also, for example, define certain price or discount lists in the *Products* work center.

End-users can also define additional discounts or surcharges manually for a quote in the sales quote *Pricing* tab.

> **i Note**
>
> As an end-user, you can add existing price components and also rename the price component from the product level on the *Pricing* tab in each sales quote.

21.2.4 How do I calculate the profit margin for a sales quote?

You can manually add the cost of a product on sales quote *Pricing* tab.

To calculate the profit margin, your Administrator must scope this in the business configuration.

1. End-users should select the product.
2. choose *Add Row.*
3. select the *Cost Estimate* price component.

21.2.5 Can I give a fixed discount instead of a percentage-based discount?

Yes, there is a workaround for administrators to do this.

As an Administrator, navigate to fine-tuning activity *Configure Pricing Strategy*. Here you can rename the price component descriptions for *Quality Loss Fee* on product level and *Restocking Fee* on header level. Both price

elements can only be maintained on the *Pricing* tab. *Quality Loss Fee* will appear in *Item Pricing* section and restocking fee will appear in *Total Pricing* section. Both can be used as price components to represent a fixed discount. The renaming of the price components will also be considered in the output for the sales quote.

You can add existing price components and also rename the price component on the pricing tab on product level (not header conditions) for each quote.

21.2.6 Why aren't prices from an opportunity copied to the sales quote?

In opportunities, there is no ability to maintain prices or discounts or other price specifications.

As an end-user, you can only overwrite a calculated price value in the opportunity. Depending on *Pricing Date*, the solution performs a a price determination if a quote is created as a follow-up document from an opportunity. The outcome is an accurate price result.

21.2.7 Is gross pricing supported?

No, we only support net pricing. Tax determination is out of scope for Internal Pricing.

21.3 Work with External Pricing

Learn about SAP Cloud for Customer external pricing and how retrieve complete price information including tax from an external system.

If your administrator has set-up external pricing in your system, you can retrieve complete price information including tax from an external system for your sales quote documents. The configuration, if external pricing is applicable, depends on the selected document type.

When you create a sales quote in your system and you have a connection to an external system, such as SAP CRM and SAP ERP, a request can be triggered to the external system to simulate a sales order.

21.3.1 Tips on Working with External Pricing

Please keep in mind the following tips when you work with external pricing.

- Your system is connected directly with the external system.
- When you request pricing, the found pricing conditions are shown in your sales quote. The external system controls whether an existing price component can be changed or deleted as well as whether it's allowed to add a new price component. Only manually added price components can be deleted.
- The pricing status is only reset when you change standard fields. In case you change only extension fields the update must be triggered separately using a SAP Cloud Applications Studio implementation.

- When you copy a quote or create a follow-up quote or order, only, the manually changed or added conditions are copied.
- When you request pricing and the external system raises error messages, the messages are shown in your system but aren't saved. If you reopen a quote which is calculated with errors you have to request pricing again to see the error messages.

21.3.2 Request External Pricing

Learn more about how to request external pricing.

Once your administrator has correctly set-up external pricing, you create your quote, request the pricing from the external system by clicking ▐▶ *Actions* ❯ *Request Pricing.* ❳ Similarly, you can use the action *Simulate* to retrieve external pricing for a sales order.

The external system then simulates a complete document, and you receive the results in your quote or order.

In the solution, you can adapt the following header hidden fields and make them visible for external pricing:

- *Pricing Status* – Only a successfully calculated quote can be submitted.
- *Pricing Date* – This is a hidden field which is also available internal pricing.
- *Pricing Procedure*
- *Total (Gross)*

On the detailed view of the sales quote *Products* tab, the following fields are displayed:

- *Product Pricing* – Displays the pricing overview for the selected Product.
- *Total Pricing* – Displays the pricing overview for the complete sales quote.
- *Adjusted Item Price* – Considers item and header price elements.
- *Adjusted Item Value* – Considers item and header price element times requested quantity.

> **i** Note
>
> Fields *List Price* and *Product Discount (%)* are not available in the product table for external pricing.

Follow-up Documents

If you have an integration with an external system, where you, for example, process your sales orders, you can then capture the references to the follow-up documents in the sales quote under ▐▶ *Sales Documents* ❯ *External Follow-Up Documents.* ❳

21.3.3 External Pricing with Free Goods, Product Availability, and Credit Status

Learn about SAP Cloud for Customer external pricing for free goods, product availability check, as well as enhanced external pricing.

When you have enabled the external pricing in your system you receive for a specific sales quote document type, pricing details from the external system. In addition, the solution also provides:

- Complete pricing information including tax and gross and net values
- Free goods determination
- Product availability check
- Credit status

The prerequisite is that your administrator has enabled the external pricing for the document type and for the pricing itself aligned the pricing texts (conditions and subtotal descriptions) in the business configuration.

Enhanced External Pricing

You can view and edit a limited amount of *External Price Elements* directly on header or in products table of sales quote or sales order. You can also completely hide the *Product Pricing* and *Total Pricing* view in order to focus on the main price elements.

21.4 External Pricing FAQs

Having trouble using external pricing? Check this list of questions and answers for help.

21.4.1 Does external pricing support contract or promotion determination in on-premise?

Yes, it is supported if there is a unique determination.

Pricing is done through order simulation in on-Premise. If only one contract or promotion is automatically determined in the simulated document without the user selecting the relevant contract or promotion, the price calculation consider these determinations. In addition, the correct price result is displayed.

21.4.2 Does the solution display inactive price elements?

Yes. The solution also displays inactive price elements, such as, recommend *Retail Price*. This is indicated on the user interface with a yellow status icon.

21.5 Flexible Offline Pricing

With flexible offline pricing, use the ERP/SAP S/4HANA pricing procedures for estimating prices in your in SAP Cloud for Customer offline mode. You can also use the feature to provide manual discounts for sales orders at header and item levels. Pricing calculation is also supported for SAP ERP field extensions.

The standard solution supports price calculation works for sales orders, sales quotes and service tickets in offline mode. The offline support is extended to support 9 fields in the condition table, in order to support price calculation. This enhancement allows you to cover newer pricing scenarios.The offline pricing engines are enabled to compute the pricing procedure, condition types and access sequences similar to ERP/SAP S/4HANA pricing engine. This feature is based on SAP ERP/SAP S/4HANA Pricing and enables reuse of existing pricing procedures for supported fields from SAP ERP/SAP S/4HANA by simply exporting them from SAP ERP/SAP S/4HANA and uploading them in SAP Cloud for Customer.

> **i Note**
>
> Flexible offline pricing is also supported for your SAP S/4HANA (Version 1809) connections. Note that there is complete feature parity with the offline pricing support for SAP ERP/SAP S/4HANA edition, with the exception of condition limits.

Notes to be Implemented for Offline Pricing

Note Number	Relevant For
2409457	Replication of Pricing Customization from SAP ERP/SAP S/4HANA system
2584517	Replication of Pricing Customization from SAP ERP/SAP S/4HANA system
2556538	Replication of Pricing Customization from SAP ERP/SAP S/4HANA system
2600999	Access Sequence fields not downloaded
2627106	Support for condition limits in Price Calculation in SAP Cloud for Customer Offline pricing
2691816	Pricing customization upload fails in SAP Cloud for Customer.

Note Number	Relevant For
2668310	Usability improvements in Pricing Customization Download Wizard
2700915	Pricing customization download wizard support for additional fields
2585351	Support for fields Price List and Price Group in Pricng customization download wizard
2788726	Pricing customization download wizard support for additional fields
2917684	Support Plant field in offline price determination
2978410	Additional fields support for offline pricing in SAP Cloud for Customer pricing customization download wizard (SAP S/4HANA)
2767063	Enhancements to Offline Pricing customization download wizard for S4 Hana
3014767	Allow downloading of complete pricing procedure customization
2978410	Additional fields support for offline pricing

21.5.1 Prerequisites

Ensure that the prerequisites listed in this topic are adhered to before configuring offline pricing in your system.

- The minimum version of SAP ERP/SAP S/4HANA that current offline pricing scenario requries you to run is SAP ERP/SAP S/4HANA Coderint SP36.
- Configure the system landscape as described under Sales Order Integration with ERP.

21.5.2 Scope of Supported Features

The solution scope includes offline pricing as available in SAP ERP /SAP S/4HANA systems. Any limitations and restrictions are discussed in the following chapters.

21.5.3 Restrictions Due to Unsupported Customization Data

There are certain restrictions in the offline pricing feature attributed to unavailability of certain attributes of pricing customization objects.

Based on the restrictions listed above, here is the list of feature restrictions that apply for offline pricing:

Condition Type

Attribute/Feature	Supported	Unsupported
Condition Class	B (Price)	P (compare price protection)
	A(Discount or Surcharge)	C (expense reimbursement),
		D (Taxes),
		E (Extra Pay),
		F (Fees or differential),
		G (Tax classification),
		H (determining sales deal),
		Q (Totals record for fees),
		W (Wage withholding tax)
Condition Category		i (ship & debt1),
		j (ship & debt 2),
		l (TPILV),
		m (SSR discount),
		n(Profit center internal price),
		o(AFS season determination),
		p(SSR partner commission),
		&(AFS value-added services)
		Other Domain Values
Structure Condition		A (condition to be duplicated),
		B (cumulation condition)
Calculation Type	A(Percentage)	J (Per mile),
	B(Fixed Amount)	K (Per mile in thousands),
	C(Quantity)	T (multi-dimensional),
	Percentage and Fixed Amount (Only in sales order and sales quote)	W (Percentage with 6 decimals)
		Other Domain Values

Condition Type

Attribute/Feature	Supported	Unsupported
Scale Type	A(base scale), B (to-scale),	C (not used) Other Domain Values
Scale Basis	C (quantity scale)	Other domain values B (net value) D (gross weight scale), E (net weight scale), F (volume scale)

Access Sequence

Attribute/Feature	Supported	Unsupported
Requirement Formula		Any value
Access Type	' ' (field in fixed key part)	A (field in free key part) Other Domain Values
Number of fields in access	<=9	>9

Pricing Procedure

Attribute/Feature	Supported	Unsupported
Requirement Formula		Any value
Value Formula		Any value
Base Formula		Any value

Exclusion Processing

Attribute/Feature	Supported	Unsupported
Condition Exclusion Procedure(KAUVF)	A (Best Condition between condition types),	L (Least favorable between condition types)
	B (Best Condition within condition type),	
	C (Best condition between two exclusion groups),	
	D (Exclusive),	
	E (Least favorable within the condition type),	
	F (Least favorable within the two exclusion groups)	

21.5.4 Known Limitations in Flexible Offline Pricing

Due to restrictions or unavailability of certain attributes, certain features are not yet supported in offline pricing.

See the list of features that are not yet supported in offline pricing:

- Currency conversion

  > **i Note**
  >
  > Since currency conversion is not supported in offline pricing, the sales/service document currency should be the same as the currency maintained for price/discount/surcharge condition records in SAP Cloud for Customer.

- User exits
- Data field in condition table
- Structure conditions
- Copy process
- Tax calculation
- Quantity conversion (Only supported in sales order and sales quote)
- Group condition processing (Only supported in sales order and sales quote)

21.5.5 Configure Integration of Pricing Master Data

Administrators can enable flexible offline pricing in your SAP Cloud for Customer system and perform the requisite configuration steps to bring pricing master data from SAP ERP/SAP S/4HANA to your SAP Cloud for Customer system.

1. Enable Flexible Offline Pricing in SAP Cloud for Customer [page 909]
   Administrators can enable flexible offline pricing in SAP Cloud for Customer.
2. Enable Offline Pricing for Specific Business Roles [page 909]
   Price master data download is restricted by user role. For example, you can assign price master data download to roles you have created for field service technicians. Administrators must enable offline pricing for specific business roles.
3. Maintain Pricing Customization Data in Your SAP ERP/S/4HANA System [page 910]
   As a prerequisite, the pricing customization data (including the pricing procedure and related customization), must be available in your SAP ERP/S/4HANA system. The offline support is extended to support 9 fields in the condition table, in order to support price calculation. If the pricing customiziation data is already maintained in your system, ignore this step and continue with the next step - to download pricie customization data.
4. Download Pricing Customization from ERP/S/4HANA System [page 911]
   Administrators must configure download of pricing customization.
5. Maintain Relevant ID and Code List Mapping in SAP Cloud for Customer [page 912]
   Administrators can maintain the mapping between code lists in SAP Cloud for Customer and the relevant fields in the condition tables.
6. Upload Pricing Customization to Your Cloud Solution [page 913]
   To replicate the pricing master data, administrators must upload the data that you have downloaded from the ERP/S/4HANA system.
7. Verify Customizing Data [page 917]
   You have uploaded the customizing data from ERP to SAP Cloud for Customer. Verify that all your data has been uploaded to the cloud system.
8. Maintain Determination Rules for Offline Pricing [page 917]
   Administrators can maintain offline pricing determination rules in your SAP Cloud for Customer system.
9. Replicate Pricing Master Data to Your Cloud Solution [page 918]
   Administrators must run the report to replicate pricing master data from SAP ERP/S/4HANA systems.
10. Set Up Automatic Delta Download of Pricing Conditions [page 918]
    Administrators must setup the automatic delta download of pricing conditions.
11. Verify Replicated Pricing Master Data in Your Cloud Solution [page 919]
    After the masterdata is downloaded, check the same in the SAP Cloud for Customer system.

21.5.5.1 Enable Flexible Offline Pricing in SAP Cloud for Customer

Administrators can enable flexible offline pricing in SAP Cloud for Customer.

> **i Note**
>
> Before setting up offline pricing, ensure that the required configuration has been pre-defined in both the SAP ERP/SAP S/4HANA system as well as your cloud solution. For detailed information, see Offline Pricing in SAP Cloud for Customer

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◀. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *General Business Data* ❯ *Product and Service Pricing* ❯ *Sales Price Specifications* ◀ and ensure the following questions are selected:

- *Do you want to perform offline price calculation using external pricing configuration?*
- *Do you want to maintain prices without price lists that will be used for offline pricing?*
  Select this scoping question if you want to display the *Pricing* work center in your cloud solution. Prices replicated from SAP ERP/SAP S/4HANA system are displayed in this work center.

Parent topic: Configure Integration of Pricing Master Data [page 908]

Next: Enable Offline Pricing for Specific Business Roles [page 909]

21.5.5.2 Enable Offline Pricing for Specific Business Roles

Price master data download is restricted by user role. For example, you can assign price master data download to roles you have created for field service technicians. Administrators must enable offline pricing for specific business roles.

Enable offline pricing for specific user roles by following these steps:

1. Go to ▶ *Administrator* ❯ *Offline Settings* ❯ *Data Download Rules* ◀ and select the check box for *Enable queries with grant*.
2. Select *Add*.
3. In the pop up, select the *Business Role* for which you want to enable price master data download. In the *Workcenter View* dropdown, chose *Price Master Data* and under *Query* dropdown, select *Dependent on data downloaded*.
4. Finally, select *Add* to enable price master data download for that role.

Parent topic: Configure Integration of Pricing Master Data [page 908]

Previous: Enable Flexible Offline Pricing in SAP Cloud for Customer [page 909]

Next: Maintain Pricing Customization Data in Your SAP ERP/S/4HANA System [page 910]

21.5.5.3 Maintain Pricing Customization Data in Your SAP ERP/S/4HANA System

As a prerequisite, the pricing customization data (including the pricing procedure and related customization), must be available in your SAP ERP/S/4HANA system. The offline support is extended to support 9 fields in the condition table, in order to support price calculation. If the pricing customiziation data is already maintained in your system, ignore this step and continue with the next step - to download pricie customization data.

> ### i Note
>
> 1. If you do not see the tab TMC1T in the downloaded xls from ERP/S/4HANA, then you need to apply the following SAP note 2409457 in your ERP/S/4HANA system.
> 2. Also apply the following notes in the ERP/S/4HANA system:
>   - 2584517
>   - 2556538

If the required pricing customization data that you need to replicate to your cloud solution, is not yet available in your SAP ERP/S/4HANA system, then follow these steps to maintain the data:

1. **Create Condition Table**: To create the condition table, perform the transaction ▌▶ *SPRO* ❭ *Sap Reference IMG* ❭ *Sales and Distribution* ❭ *Basic Functions* ❭ *Pricing* ❭ *Pricing Control* ❭ *Define Condition Table* ❭ *Create Condition Table* ❭

   > ### i Note
   >
   > In SAP Cloud for Customer Offline pricing, the field types supported are only Code and IDs. Please check the list of supported fields for sales and service before creating condition tables. The order in which the fields are present is also specific. Please make sure all code fields appear before ID fields in the table.
   > 1. Code - fields which will be mapped to code fields in SAP Cloud for Customer
   > 2. IDs - fields which will be mapped to UUIDs in SAP Cloud for Customer

2. **Create Access Sequence**: To create access sequence, go to ▌▶ *SPRO* ❭ *Sap Reference IMG* ❭ *Sales and Distribution* ❭ *Basic Functions* ❭ *Pricing* ❭ *Pricing control* ❭ *Define Access Sequence* ❭ *Maintain Access sequences* ❭

3. **Create Condition Type**: To create condition type, go to ▌▶ *SPRO* ❭ *Sap Reference IMG* ❭ *Sales and Distribution* ❭ *Basic Functions* ❭ *Pricing* ❭ *Pricing control* ❭ *Condition types* ❭

   > ### i Note
   >
   > In SAP ERP/S/4HANA it is allowed to create a discount/surcharge condition without a sign. However in SAP Cloud for Customer the sign is mandatory. Please set the Plus/Minus field to X for discounts and A for surcharges.
   >
   > In SAP ERP/S/4HANA it is allowed to create a scale based condition without mentioning the scale type. However in SAP Cloud for Customer, it is mandatory to maintain a scale type (A or B) if a condition type has a scale basis maintained.

4. **Create Pricing Procedure**: To create condition type, go to ▌▶ *SPRO* ❭ *Sap Reference IMG* ❭ *Sales and Distribution* ❭ *Basic Functions* ❭ *Pricing* ❭ *Pricing control* ❭ *Define and assign pricing procedure* ❭.

Now, we need to download the customized pricing with the help of download tool. This downloaded customized pricing will be uploaded in to SAP Cloud for Customer System.

> i Note
>
> 1. If you do not see the tab TMC1T in the downloaded xls from ERP/S/4HANA, then you need to apply the following SAP note 2409457 in your ERP/S/4HANA system.
> 2. Also apply the following notes in the ERP/S/4HANA system:
>   - 2584517
>   - 2556538

Parent topic: Configure Integration of Pricing Master Data [page 908]

Previous: Enable Offline Pricing for Specific Business Roles [page 909]

Next: Download Pricing Customization from ERP/S/4HANA System [page 911]

21.5.5.4 Download Pricing Customization from ERP/S/4HANA System

Administrators must configure download of pricing customization.

Follow the steps below for downloading the customization from ERP/S/4HANA:

1. Go to transaction se38 in the ERP/S/4HANA system. Execute the report program RCOD_PRC_CUST_EXTRACT_TO_EXCEL to download the pricing procedure and related customization.
2. Enter the *Pricing Procedure* created earlier and click *Extract*. All the pricing customization is downloaded in excel.
3. Save the downloaded excel to the local system.
   In ERP/S/4HANA system if you are on SAP Cloud for Customer ERP/S/4HANA add-on (CODERINT) CODERINT 6.0 SP36 or above you can use the report program RCOD_PRIC_PROC_CUST_EXTRACT to download the pricing procedure and its related customization.

   1. Go to transaction se38 in the ERP/S/4HANA system. Execute the report program `RCOD_PRIC_PROC_CUST_EXTRACT` to download the pricing procedure and related customization.
   2. Enter the pricing procedure created earlier and click *Next*. The pricing procedure steps will be listed down for your selection.

      > i Note
      >
      > Select the *Allow all fields* checkbox to enable customization download for all fields.
      >
      > This is available only for code fields; ID fields are not supported.

   3. Select the pricing procedure steps you need to download and click *Next*.
   4. Now the access steps involved with each of the accesses corresponding to the condition types contained in the pricing procedure steps selected in the previous step will be listed down. Select the access steps you need to download and click *Next*.

5. System will prompt you to save your excel.
6. Save the excel to your local system.

> ⚠ Caution
>
> Do not make any manual changes to the excel downloaded using the program
> RCOD_PRIC_PROC_CUST_EXTRACT. This can lead to inconsistencies in the system. SAP is not liable for
> incorrect customization resulting from manual changes in the downloaded excel.

Parent topic: Configure Integration of Pricing Master Data [page 908]

Previous: Maintain Pricing Customization Data in Your SAP ERP/S/4HANA System [page 910]

Next: Maintain Relevant ID and Code List Mapping in SAP Cloud for Customer [page 912]

21.5.5.5 Maintain Relevant ID and Code List Mapping in SAP Cloud for Customer

Administrators can maintain the mapping between code lists in SAP Cloud for Customer and the relevant fields in the condition tables.

Maintain the relevant ID and code list mapping in SAP Cloud for Customer

1. The ID mappings for all relevant fields in the condition tables such as products, customers, sales organization, etc., need to be performed in the SAP Cloud for Customer system.
2. Secondly relevant code list mapping also needs to be done for codes like Distribution Channel, country, etc.
3. Maintain the code list mapping for *Scale Axis Step Interval Boundary Type Code* as follows:

4. Maintain the code list mapping for Scale Axis Base Code as follows:

Parent topic: Configure Integration of Pricing Master Data [page 908]

Previous: Download Pricing Customization from ERP/S/4HANA System [page 911]

Next: Upload Pricing Customization to Your Cloud Solution [page 913]

21.5.5.6 Upload Pricing Customization to Your Cloud Solution

To replicate the pricing master data, administrators must upload the data that you have downloaded from the ERP/S/4HANA system.

Now upload the pricing customization in SAP Cloud for Customer, where offline pricing using external pricing is scoped. There are three main steps for it.

1. **Create Field Mapping**: Map the fields used in the condition table in ERP/S/4HANA in pricing customization to the fields available in SAP Cloud for Customer.
   Follow the steps below to create field mapping-
   1. Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tuning* ❯ *Offline Pricing Using External Pricing* ❯.
   2. Select *Pricing Field Mapping*.

   > **i Note**
   >
   > If field mapping was done prior to 1805 upgrade, then you need to perform the mapping all over again for a technical reason. Make sure to delete the existing field mapping and save and then maintain afresh the required field mapping.

3. Maintain the field mapping in the resulting view.

> **i** Note
>
> Supported fields should be mapped like the following:
>
> | SAP Cloud for Customer Field | SAP ERP/S/4HANA Field |
> |---|---|
> | COUNTRY/REGION | ALAND |
> | COUNTRY/REGION | LAND1 |
> | COVERAGE | BEMOT |
> | BUYER GUID | KUNNR |
> | BUYER GUID | HIENR |
> | BUYER HIERARCHY 1 | HIENR01 |
> | BUYER HIERARCHY 2 | HIENR02 |
> | BUYER HIERARCHY 3 | HIENR03 |
> | BUYER HIERARCHY 4 | HIENR04 |
> | BUYER HIERARCHY 5 | HIENR05 |
> | BUYER HIERARCHY 6 | HIENR06 |
> | BUYER HIERARCHY 7 | HIENR07 |
> | BUYER HIERARCHY 8 | HIENR08 |
> | BUYER HIERARCHY 9 | HIENR09 |
> | INCOTERMS | INCO1 |
> | INCOTERMS LOCATION | INCO2 |
> | CUSTOMER GROUP | KDGRP |
> | PRODUCT CATEGORY | MATKL |
> | PRODUCT GUID | MATNR |
> | PRODUCT GROUP 1 | MVGR1 |
> | PRODUCT GROUP 2 | MVGR2 |
> | PRODUCT GROUP 3 | MVGR3 |
> | PRODUCT GROUP 4 | MVGR4 |

SAP Cloud for Customer Field	SAP ERP/S/4HANA Field
PRODUCT GROUP 5	MVGR5
PRODUCT GUID	PMATN
DIVISION	SPART
SALES ORGANIZATION	VKORG
DISTRIBUTION CHANNEL	VTWEG
PAYMENT TERMS	ZTERM
GTIN ID	EAN11
ORDER REASON CODE	AUGRU
SHIP-TO PARTY	KUNWE
BILL-TO-PARTY	KUNRE
SHIP-TO-PARTY	KUNRG
PRICE LIST	PLTYP
PRICE GROUP	KONDA
PLANT	WERKS

For more information on supported fields, please refer to the related information section.

2. **Upload Pricing Procedure and related customization to SAP Cloud for Customer using the customization excel downloaded from ERP/S/4HANA system**

> **i Note**
>
> Upload process happens in the background and might take some time to complete. The status of upload can be checked under the application log button.

Follow the steps below to upload pricing procedure and related customization into SAP Cloud for Customer:

1. Go to ▶ *Business Configuration* > *Implementation Projects* ◀. Select your project and navigate to ▶ *Open Activity List* > *Fine-Tuning* > *Offline Pricing Using External Pricing* ◀.
2. Select *Offline Price Strategy*.
3. Choose the external system type as ERP/S/4HANA and browse for the customization excel saved to local machine in step 2.

> **i Note**
>
> Condition type, Access sequence, Pricing condition table, pricing table mapping is automatically populated if everything is set properly. Once the condition table is created in SAP Cloud for Customer, the fields of the table cannot be changed.

3. **Pricing Procedure Determination for Offline Price Calculation.**
   You can maintain your pricing procedure determination rule for the combination of sales area and document type. After maintaining the pricing procedure determination rule, ensure the rules have been activated.

RULES

| Add Row | Insert Row | Remove | Copy | Paste | Swap | Adapt Columns | Upload | Download |

Sequence	Sales Org ID	Distribution Channel	Division	Doc Proc Type Code	Pricing Procedure
1	Extended Sales Unit	Direct sales	*	Service Request	ZSERVT
2	Extended Sales Unit	Direct sales	*	Field Service (Z)	ZSERVT

> **i Note**
>
> In this screenshot, the * character means nothing is selected and cannot be treated as **Select All**. It doesn't represent the wild card character in this context.

Parent topic: Configure Integration of Pricing Master Data [page 908]

Previous: Maintain Relevant ID and Code List Mapping in SAP Cloud for Customer [page 912]

Next: Verify Customizing Data [page 917]

Related Information

Sales Scenario [page 920]
Service Scenario [page 923]

21.5.5.7 Verify Customizing Data

You have uploaded the customizing data from ERP to SAP Cloud for Customer. Verify that all your data has been uploaded to the cloud system.

Go to ▶ *Business Configuration* ▶ *Implementation Projects* ◀. Select your project and navigate to ▶ *Open Activity List* ▶ *Offline Pricing Using External Pricing* ◀, click on the hyperlinked activities to verify the data uploaded into the SAP Cloud for Customer from SAP ERP system.

Parent topic: Configure Integration of Pricing Master Data [page 908]

Previous: Upload Pricing Customization to Your Cloud Solution [page 913]

Next: Maintain Determination Rules for Offline Pricing [page 917]

21.5.5.8 Maintain Determination Rules for Offline Pricing

Administrators can maintain offline pricing determination rules in your SAP Cloud for Customer system.

Go to ▶ *Business Configuration* ▶ *Implementation Projects* ◀. Select your project and navigate to ▶ *Open Activity List* ▶ *Fine-Tune* ▶ *Offline Pricing Using External Pricing* ◀. Maintain the following configuration:

- Pricing Field Mapping
- Offline Price Strategy
- Condition Type
- Pricing Condition Limits
- Access Sequence
- Pricing Condition Table
- Pricing Table Mapping
- Pricing Exclusion Procedure
- Pricing Exclusion Group
- Determine Pricing Procedure

Parent topic: Configure Integration of Pricing Master Data [page 908]

Previous: Verify Customizing Data [page 917]

Next: Replicate Pricing Master Data to Your Cloud Solution [page 918]

21.5.5.9 Replicate Pricing Master Data to Your Cloud Solution

Administrators must run the report to replicate pricing master data from SAP ERP/S/4HANA systems.

Now execute the report RCOD_CONDITIONS_EXTRACT to create Idocs in ERP/S/4HANA system and send them across to SAP Cloud for Customer system via process integration.

Executing report RCOD_CONDITIONS_EXTRACT provides details such as, valid from, valid to and logical system, table created in first step and logical system, where data need to be sent.

Uncheck the test mode and click *Execute*, then the IDOCS will be created and will be sent to SAP Cloud for Customer System.

Parent topic: Configure Integration of Pricing Master Data [page 908]

Previous: Maintain Determination Rules for Offline Pricing [page 917]

Next: Set Up Automatic Delta Download of Pricing Conditions [page 918]

21.5.5.10 Set Up Automatic Delta Download of Pricing Conditions

Administrators must setup the automatic delta download of pricing conditions.

Delta load is initiated via report RBDMIDOC run with selection as COND_A. If you use the standard connectivity settings report then this is scheduled automatically for you provided you select price condition replication in scoping screen of the report.

Else you can create a variant for input as COND_A and schedule the report RBDMIDOC to run with this variant for the desired interval

Standard Connectivity Report: RCOD_CREATE_CONNECTIVITY_SIMPL.
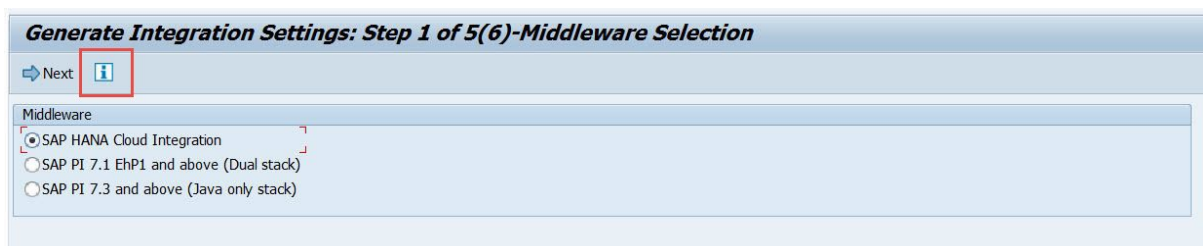
> **i Note**
>
> Click on info button for complete documentation of this report.

Parent topic: Configure Integration of Pricing Master Data [page 908]

Previous: Replicate Pricing Master Data to Your Cloud Solution [page 918]

21.5.5.11 Verify Replicated Pricing Master Data in Your Cloud Solution

After the masterdata is downloaded, check the same in the SAP Cloud for Customer system.

Follow the steps below to check the downloaded master data in SAP Cloud for Customer:

1. Logon to SAP Cloud for Customer system and go to the *Products* work center view.
2. Go to ▐ *Products* ▶ *Prices* ▌, choose the *Condition Type* from the drop down to view the downloaded master data.

21.5.6 Sync Pricing Master Data to Offline

Sync your pricing master data to offline. As a prerequisite, maintain the configuration required to sync your pricing master data to offline.

Based on the configuration, appropriate procedure will be determined for calculation within offline runtime. Scope of the price master data for download is also decided based on this setting from the sales organization perspective.

21.5.6.1 Offline Business Object Availability for Pricing Master Data Sync

Sync of pricing master data is context based and depends on availability of the corresponding business objects in offline.

The following objects act as context for pricing master data download:

- Sales Organization of the logged in user.
- Accounts
- Products

> **i Note**
>
> If the pricing master data involves accounts, products and sales organization, then the corresponding data is downloaded to offline only if those accounts, products and sales organizations are already synced to offline.

21.5.7 Support for Currency Conversion in Offline Pricing

You can now change the document (sales order and sales quote) currency to estimate prices in a different currency. The currency conversion feature takes care of converting back into the document currency that is maintained in the price master data.

The currency conversion in offline is useful when you have maintained the same pricing procedure across different countries. For users to be able to use this feature, administrators must maintain the required configuration and the conversion data from ERP must be available in sales cloud.

21.5.7.1 Configure Currency Conversion for Prices in Offline

Administrators must maintain the configuration required for offline currency conversion.

Go to ▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▶ *Edit Project Scope* ❭ *Questions* ❭ *General Business Data* ❭ *Product and Service Pricing* ❭ *Sales Price Specifications* ❭ and select the scoping question: *Do you want to use currency conversion for calculating prices in flexible offline pricing?*

You must also fetch the currency conversion rates from ERP using the program `RCOD_PRC_CONV_EXTRACT`. This program generates a zip file with multiple excel files containing the currency conversion data. Use the relevant oData service in data workbench to upload this data into Sales Cloud.

21.5.8 Sales Scenario

Specific feature availability for *Sales Orders* and *Sales Quotes* in the new offline pricing calculation.

Sales Pricing Features

Apart from the standard features, the following features are available for *Sales Orders* and *Sales Quotes*:

> **i Note**
>
> Offling pricing will only be available after a sales order has been simulated while online for each order type, pricing procedure, and sales area combination defined in the fine tuning activity under ▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Offline Pricing Using External Pricing* ❭ *Determine Pricing Procedure Rules* ❭.

- *Estimate Price*
  - Use the action *Estimate Price* to view price calculation including total estimate price, price per line item, and manual discounts.

- Estimated Prices get transferred to item totals, and the *Total Estimated Price* becomes the total order value.

- *Price Breakdown in Item Proposal Screen*
  - In the item proposal screen, use the *Estimated Price* column to view the price breakdown of each item.
  - You can select a price in the *Estimated Price* column to view the full price breakdown.
  - You see the *Estimated Price* until the order is synced. Once the order is synced, the estimated values are moved to *Net Value* and item totals.

> **i Note**
>
> The *Estimate Price* is only available in the *Item Proposal* screen.

- *Net Value*
  - The *Net Value* displays the estimated price of an item including any discounts available.
  - If manual conditions are configured in the pricing procedure, view and maintain manual discounts, both absolute and percentage, using configurable price elements.
  - To view the *Net Value*, *Save* the order.
  - Once an order is synced, whether you're online or offline, you'll no longer see the *Estimated Price*. The estimated price data is moved to item totals and net values.
  - The *Net Value* is still an estimate that will be synced from offline to online. Once you are online, use the *Simulate* or *Transfer* actions to retrieve real-time pricing from ERP/S/4HANA.

Sales Fields

For the feature to work, the supported fields must be used in defining the pricing procedure. The offline pricing procedure for a document type should be a subset of the online pricing procedure and have the same name.

The following standard fields are supported in the offline pricing engine for *Sales Orders* and *Sales Quotes*:

- Customer
- Products
- Sales Organization
- Distribution Channel
- Division
- Country of Sold-to-Party
- Customer Group of Sold-to-Party
- Incoterms
- Incoterms Location
- Payment Terms
- Document Type
- Sales Unit
- Plant
- Sales Group
- Sales Office
- Account Classification
- Item Category

- Document Sales Org
- Material Groups 1-5/Product Groups 1-5 (in SAP Cloud for Customer)
- Material Category/Product Category (in SAP Cloud for Customer)
- Account Hierarchy

> **i Note**
>
> The new offline pricing is separate from the regular offline pricing feature (already available in SAP Cloud for Customer) that you may have implemented. Once you have enabled the new offline pricing, the previously implemented offline pricing feature will not work.

> **i Note**
>
> One Manual Discount % and one Manual Discount Absolute are available for Sales. For manual discounts, continue to use configurable price elements (CPE) - **PPE1** and **PPE2**.

> **i Note**
>
> Component-level breakdown for pricing is available for Sales.

21.5.8.1 Enable Manual Discount as Header Condition in Sales Orders

Administrators can enable manual discount as a header condition in pricing procedure. This allows users to enter a manual discount in the sales order header.

> **i Note**
>
> In the ERP/S/4HANA pricing procedure, you must have maintained a header condition type for manual discount condition.

To enable the feature, go to ▶ *Business Configuration* 〉 *Implementation Projects* ◀. Select your project and navigate to ▶ *Open Activity List* 〉 *Fine-Tune* 〉 *External Pricing* 〉 *Assignments of External Price Elements* ◀, and maintain the following configuration:

- Map the discount field to a configurable price element for header called *Total Price Element*.
- Maintain an appropriate label for the field.
- Assign appropriate authorizations.
- Map the field to the header condition type in the pricing procedure.

21.5.8.2 Offline Price Calculation based on Net Weight & Gross Weight

Use product weights for estimating prices in offline. Administrators can enable price calculation using weights in flexible offline pricing.

To use this feature, administrators must enable condition types for price calculation based on product net or gross weight. You must also have maintained weights for products in the product master data. To configure the feature, set up a condition type based on condition class - *Gross Weight* or *Net Weight*.

21.5.9 Service Scenario

Offline pricing usage in SAP Service Cloud.

Service technicians can request estimated pricing information for ticket service parts or products while working in offline mode. Service uses a subset of the offline pricing fields and functionality. The enablement steps are the same whether using offline pricing for Sales or Service.

The following four fields are used for offline pricing in service tickets:

- Sales Organization
- Distribution Channel
- Product
- Country

> ! Restriction
>
> In addition to the limitations listed in the Solution Scope section, component-level breakdown for pricing is not available for service tickets.

21.5.10 Extensibility

Map extension fields created in 'Z' space in SAP ERP with extension fields in your SAP Cloud for Customer and use them for offline pricing calculation.

You can also use standard code fields from SAP ERP/S4/HANA and map them to extension fields in Cloud for Customer and maintain field mapping in the pricing fields catalog.

The extension fields can be created in Cloud for Customer using Adaptation or Cloud Applications Studio.

> i Note
>
> The pricing customization based on extension fields must be analyzed well as once the customization (based on extension fields) is uploaded, it is not possible to delete the extension fields. You will see an error when you attempt to delete an extension field. Also, it is not possible to delete extension field mapping to

'Z' field after the customization based on this field is uploaded. This restriction ensures there are no inconsistencies that may arise as a result of deleting extension fields.

Extension fields from the following scenarios are supported in the current release:

- Account Header and extend to Pricing
- Product Header to Pricing
- Sales Order Header to Pricing
- Sales Order Item to Pricing

i Note

Prices are not calculated if no data is maintained in the extension fields. Involved parties are also considered for calculating prices.

To use the extension fields from ERP, you must create corresponding extension fields in Cloud for Customer and maintain the mapping for these fields. To maintain the mapping, follow these steps:

1. Create an offline mapping of the Z-fields in SAP ERP to the corresponding extension fields in Cloud for Customer.
2. Upload procedure with Z-fields.
3. Transfer price master data for the requried condition tables.
4. Define the procedure determining rules
5. Sync data for offline use.
6. Once created, do not delete the extension fields used in offline pricing calculation as this may cause database inconsistency.

22 Microsoft Teams Integration in SAP Cloud for Customer

An embedded in-app integration of SAP Sales Cloud with Microsoft Teams.

SAP and Microsoft are teaming up to enhance workspace productivity for their users. To simplify remote selling processes, the companies are launching an embedded in-app integration of SAP Sales Cloud with Microsoft Teams. With this integration, you can create SAP Sales Cloud appointments with Microsoft Teams that also provides an access to the context information from SAP Sales Cloud. The real-time and automated data updates ensure transparency, consistency, and collaboration of opportunities for the sales teams.

22.1 Scope and Configure Microsoft Teams Integration in SAP Cloud for Customer

Administrators can enable Microsoft Teams integration in SAP Cloud for Customer by following these steps:

1. Select the scoping questions
   1. Go to ▐▶ *Business Configuration* ❯ *Implementation Projects* ▐, Select your project and navigate to ▐▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Activity Management* ▐.
   2. Select the following scoping questions:
      ○ *Do you want to enable Microsoft Teams integration?*
        This scoping question enables the option for Microsoft Teams consent in *General Settings*. To grant consent for Microsoft Teams integration, follow the instructions in step 3.
      ○ Optional: *Do you want to enable appointment for Microsoft Teams collaboration by default?*

        > **i Note**
        >
        > You have the flexibility to switch off the Teams collaboration while creating an appointment even after enabling this scoping question.

      ○ Optional: *Do you want to add reference object as part of Microsoft Teams meeting request?*
        If you select this scoping question, SAP Cloud for Customer application is added to all the appointments enabled for Teams collaboration and you can see the reference object as part of the meeting.
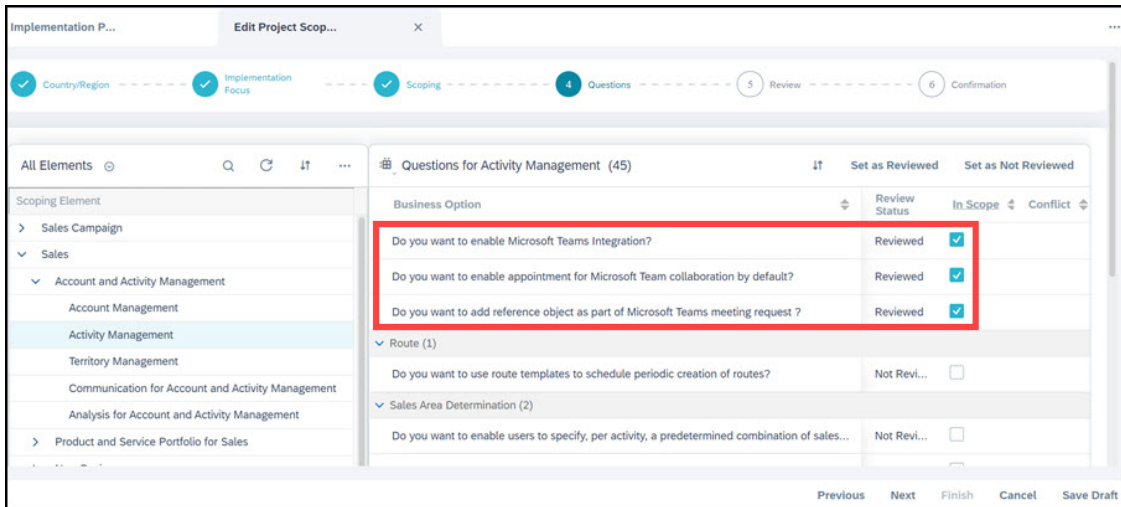
2. Add *SAP Sales and Service Core* app in the Teams app store

    1. Log in to Microsoft Teams admin center.

    2. From the home page, expand the navigation menu and go to ▶ *Teams apps* ❯ *Manage apps* ❯.

    3. Search and select the *SAP Sales and Service Core* app from the list.
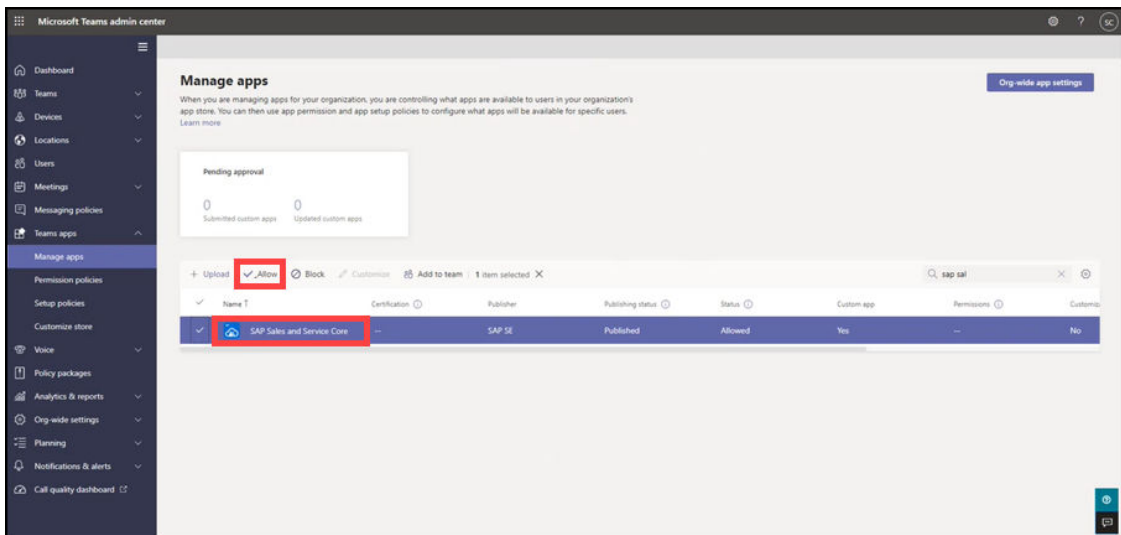
    4. Click *Allow*. A new window opens

    5. Click *Allow* again

3. Grant consent for Microsoft Teams integration

    1. Navigate to ▶ *Administrator* ❯ *General Settings* ❯.

    2. Under *Microsoft Teams*, click *Enable Microsoft Teams integration*.
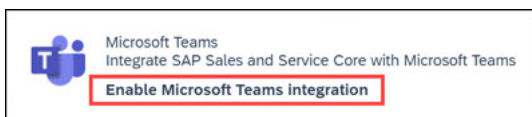
    This redirects to the Microsoft Teams authentication page.

    3. Sign in with your Microsoft 365 username and password.
       A new window opens for consent.
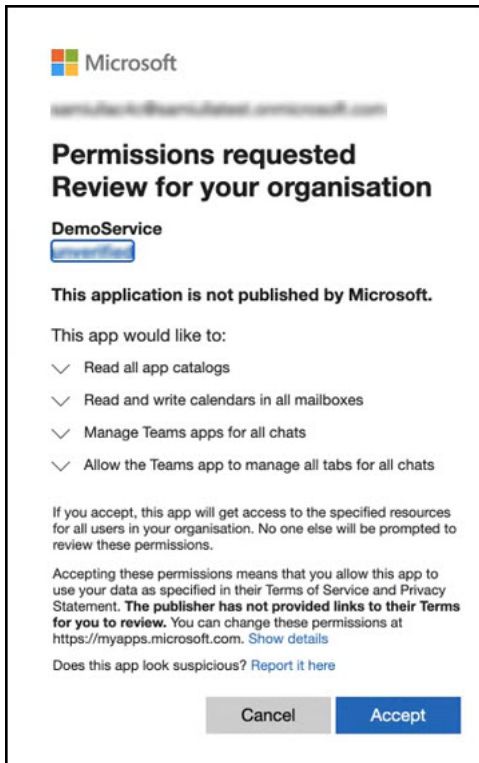
4. Click *Accept*.

   Once your administrator has given this consent, you can create appointments with Microsoft Teams integration.

   > **i Note**
   >
   > Ensure that you have the Microsoft Office 365 exchange online license.

22.2 Create Appointments with Teams Integration

You can create an appointment with Teams integration in your SAP Cloud for Customer.

> **→ Remember**
>
> Ensure that your administrator has maintained your Microsoft Teams e-mail address in the employee details.
>
> If not, go to ▶ *Administrator* ❯ *Employees* ❯. Select an employee and click *Edit*. Update the email address and *Save*.

Follow these steps to create an appointment with Teams collaboration:

1. Navigate to ▶ *Activities* ❯ *Appointments* ❯.
2. Click the *Create* icon (+) to create a new appointment.
3. Update the necessary fields such as *Subject*, *Account*, *Start Date/Time*, *Category*, and so on.

4. Check whether the Teams collaboration is enabled or not. If not, toggle on the *Collaboration*.

5. Go to *Attendees* and click *Add* to search and select the required attendees with a valid e-mail address.

> **i Note**
>
> You must add at least one attendee to proceed with the creation of teams meeting.

6. Click *Save*.

> **i Note**
>
> You cannot remove the Teams collaboration from the appointment once it is saved.

22.3 Join a Teams Meeting

Follow these steps to join a Teams meeting created from the SAP Cloud for Customer:

From SAP Cloud for Customer

Join a Teams meeting by clicking the Teams icon (⧉) using the following options:

- Upcoming activities in home page
- Appointment dataset
- Appointment object detail
- Appointment quick view
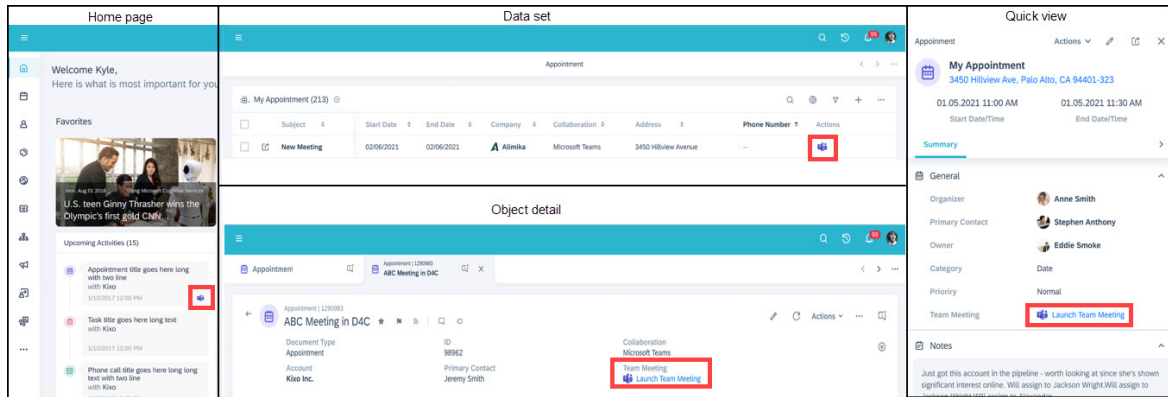
From Microsoft Teams

1. Go to *Calendar*, select an appointment and then click *Join* to enter a meeting before it's started, or one that's in-progress.
2. Select *Join now*.

22.4 Access SAP Cloud for Customer Application in Teams

Follow these steps to access SAP Cloud for Customer application in Teams:

1. From the *Calendar*, double click the meeting and go to the *SAP Sales Cloud* tab.
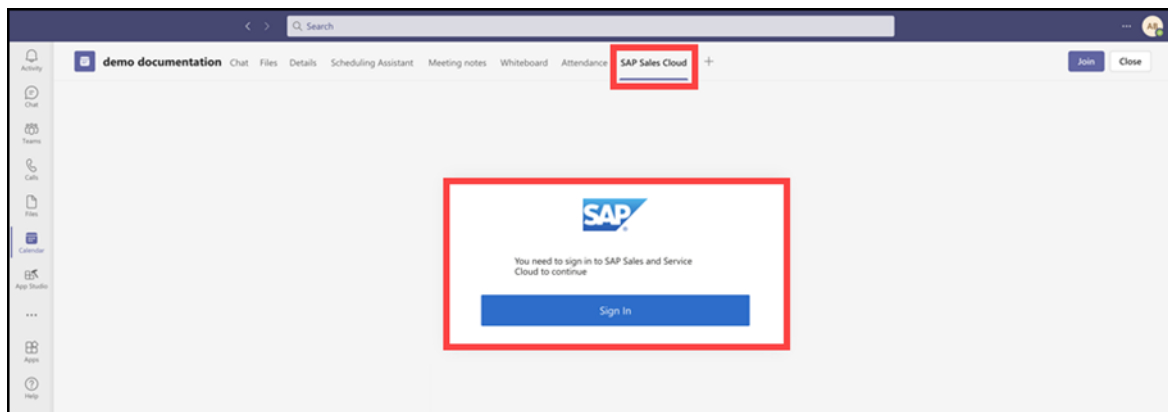
If you are already joined to a meeting, click on *SAP Sales Cloud* icon () to open the application in the side panel.
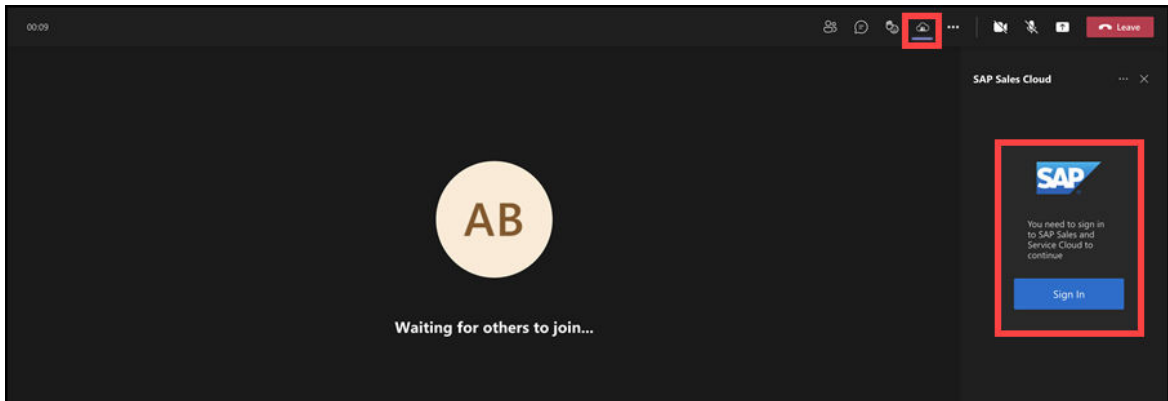
2. Click *Sign In* to start the authentication and sign in to your SAP Sales Cloud.

You can view and edit the embedded reference object when the authentication ends.

Application in the *SAP Sales Cloud* tab:
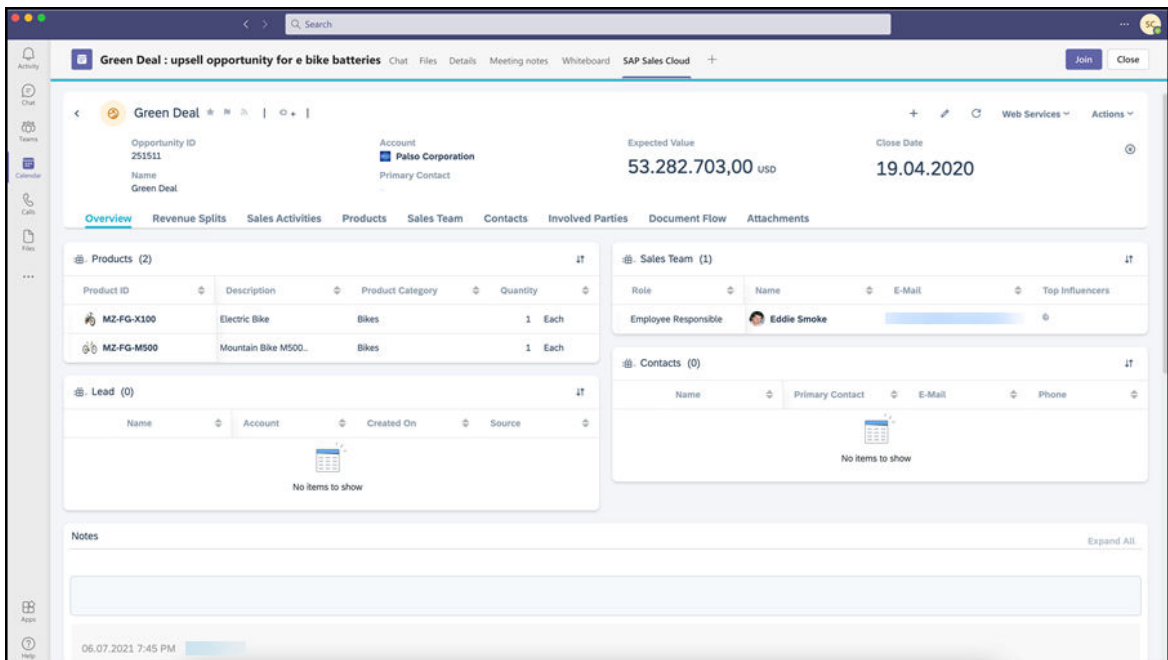
Application in the side panel during a meeting:
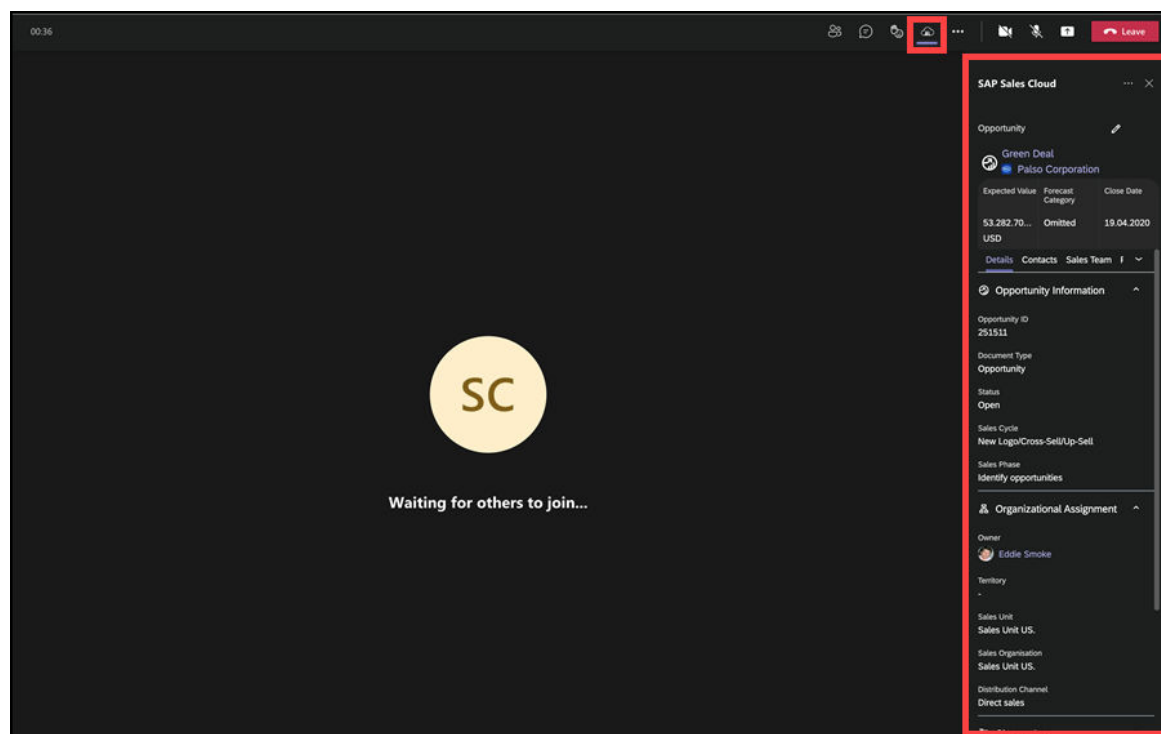
22.5 Additional Notes for Microsoft Teams Integration

- SAP Cloud for Customer application in Teams side panel is available only in the dark mode.
- The application in Teams (desktop version) doesn't identify any location-based functionality.
- Recurring activities aren't supported.
- Login duration of a user doesn't support the *Auto-LogOff* period flag.
  If an unexpected termination of the session via server happened and it isn't communicated to Teams, then you may need to relogin to Teams (desktop version) to attend the meeting created from SAP Cloud for Customer.
- During a Teams meeting:
  - In browser version, the Sales Cloud application in the side panel isn't supported.
  - In tablets, the application is available in full screen instead of side panel.
- Context objects are added to the appointments based on these scenarios:
  - If an appointment is created from any of the objects supported in quick view, then the object becomes the context object for the meeting.
  - If an appointment is created directly, then the appointment becomes the context object.
  - If you edit an existing appointment for Teams collaboration and this appointment:
    - Contains only one related item, then the related item becomes the context object.
    - Contains zero or more than one related item, then the appointment becomes the context object.
- Teams integration is available in the following quick views:

- Accounts
- Appointments
- Competitor Products
- Competitors
- Contacts
- Contracts
- E-Mails
- Employees
- Individuals
- Leads
- Opportunities
- Partner Contacts
- Partners
- Phone Calls
- Products
- Promotions
- Registered Products
- Sales Orders
- Sales Quotes
- Tasks
- Tickets
- Visits

- If you remove an attendee after creating an appointment, the removed attendee gets a cancellation e-mail.
- SAP Cloud for Customer Outlook client-side add-in or server-side add-in supports Teams integration.
- Update the add-in to the latest version to use the Teams integration along with client-side add-in.
- The language configured in SAP Cloud for Customer is only recommended in Teams. If the language is different, it considers the language configured in SAP Cloud for Customer.

23 E-Mail Add-Ins

You can leverage tools you use every day, such as your e-mail inbox, to become more productive.

SAP Cloud for Customer Add-In
for Microsoft Outlook
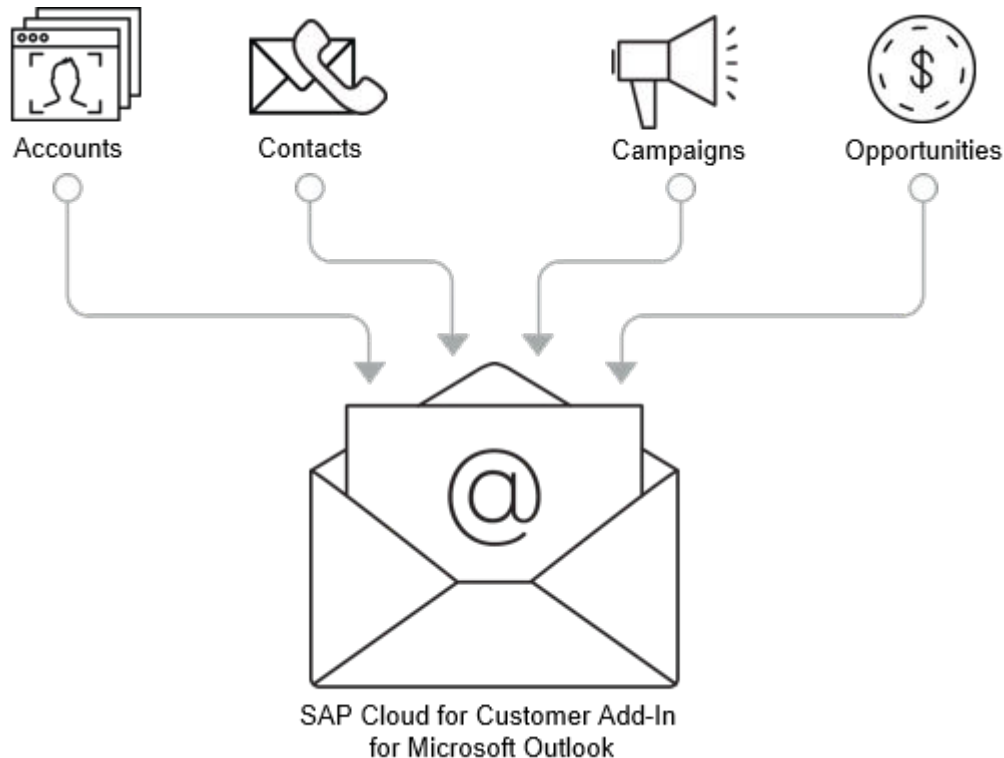
We all know the feeling: You're looking through your inbox and realize that you have to open another program to record – and sometimes even retype – customer interactions. Wouldn't it be convenient to enter information into your solution without leaving your inbox? Well, you can! If your company uses e-mail groupware such as Microsoft Outlook, IBM Notes, or Gmail as its company e-mail software, you can use some SAP Cloud for Customer features right from your inbox.

As an example, you can do the following in the Add-In for Microsoft Outlook:

After you install the appropriate add-in for your groupware application, you can log on to the solution right from your inbox. When you select a contact in your groupware, you can easily see leads, opportunities, sales quotes, campaigns, and activities.

When you select an e-mail, any information in SAP Cloud for Customer about the sender also appears in your inbox. There is a bi-directional synchronization that includes contacts, e-mail, appointments, tasks, and visits. If you update any of those items in your e-mail client, they are also updated in your solution, and if you update them in your solution directly, they are also updated in your e-mail client.

You can also search through accounts and contacts in your SAP solution right from your e-mail inbox. Easily download contacts from your SAP solution and synchronize them to your Microsoft Outlook inbox.

Working in your solution from your groupware improves your productivity. For example, from your inbox, you can link contacts with accounts, and you can drag and drop e-mail messages onto existing accounts,

opportunities, campaigns, and leads. These associations are reflected in your solution too, eliminating repetitive steps. You can also collaborate with colleagues, see notifications, and use your shelf right from your inbox.

Even when you're offline, you can create or update contacts and activities in your inbox. The next time you connect to the system, the data that you entered offline is synchronized with your solution.

23.1 Compare E-Mail Add-In Solutions

Depending on the e-mail program that your company uses, choose the e-mail add-in that makes the most sense for you.

Comparison of Add-In Solutions

If you use..	Available E-Mail Add-In Solutions	Client-Side or Server-Side Implementation	Purchase Required (in addition to SAP Cloud for Customer)	Link
Microsoft Outlook	SAP Cloud for Customer Add-In for Microsoft Outlook	Client-side	None	SAP Cloud for Customer Add-In for Microsoft Outlook [page 935]
Microsoft Outlook	SAP Cloud for Customer, server-side integration for Microsoft Outlook	Server-side	SAP Sales Cloud, enterprise edition	SAP Cloud for Customer, Server-Side Integration for Microsoft Outlook [page 990]
Gmail	SAP Cloud for Customer, Add-In for Gmail ⚠ Caution This solution is deprecated as of August 2020.	Client-side	None	
Gmail	SAP Cloud for Customer, server-side integration for Gmail	Server-side	SAP Sales Cloud, enterprise edition	SAP Cloud for Customer, Server-Side Integration for Gmail [page 1053]
IBM Notes	SAP Cloud for Customer, Add-In for IBM Notes	Client-side	None	

23.2 Premium Features for Groupware Integration

23.2.1 Compare Intelligent Sales Add-on Features

If you use SAP Sales and Service Core, you can also purchase the Intelligent Sales Add-on to unlock additional features.

The following table specifies the additional features available for Intelligent Sales Add-on premium user compared to the standard Sales and Service Core user.

	Standard (Sales and Service Core)	Premium (Intelligent Sales Add-on)
Auto-synchronization frequency	Automatic synchronization occurs every 30 minutes	Automatic synchronization occurs instantly
Supported objects for auto-synchronization	Accounts, contacts, tasks	Emails, attachments, events, appointments (including recurring appointments)
Supported objects for manual synchronization	Supports all objects	Supports all objects

All other features are avilable for the standard Sales and Service Core user.

23.2.2 Configure Premium Features for Groupware Server-Side Integration

The administrator can configure the premium features for groupware integration.

1. Go to ⫸ *Business Configuration* 〉 *Implementation Projects* ⫷.
2. Select your project and navigate to ⫸ *Edit Project Scope* 〉 *Questions* 〉 *Sales* 〉 *Account and Activity Managment* 〉 *Activity Management* ⫷ and select the scoping question *Do you want to enable premium features of groupware integration?*
3. Click *Save*.

23.3 SAP Cloud for Customer Add-In for Microsoft Outlook

The SAP Cloud for Customer Add-In for Microsoft Outlook allows you to exchange information between Microsoft Outlook and SAP Cloud for Customer.

Requirements for SAP Cloud for Customer Add-In for Microsoft Outlook (Version 4.0 or Higher) [page 936]
> Microsoft Outlook versions supported by the add-in and required frameworks and packages.

Scope and Configure SAP Cloud for Customer Add-In for Microsoft Outlook [page 937]
> Administrators can configure this add-in using scoping, scoping questions, fine-tuning, and settings in the add-in itself.

23.3.1 Requirements for SAP Cloud for Customer Add-In for Microsoft Outlook (Version 4.0 or Higher)

Microsoft Outlook versions supported by the add-in and required frameworks and packages.

> i Note
>
> Don't use both the client-side and the server-side add-in for Microsoft Outlook. If you decide to use SAP Cloud for Customer, server-side integration for Microsoft Outlook, uninstall the SAP Cloud for Customer Add-In for Microsoft Outlook.

- Microsoft Office support:

Outlook Version	Types Supported
Outlook 2019	○ Office 365 ○ Office 2019
Outlook 2016	○ Office Professional Plus ○ Office 365 ProPlus
Outlook 2013 (32 Bit or 64 Bit)	○ Office Professional Plus ○ Office 365 ProPlus
Outlook 2010 (32 Bit or 64 Bit)	○ Office Professional Plus ○ Professional ○ Standard

> **i Note**
>
> Microsoft Exchange 2010 and 2013 are supported.

- Microsoft .Net Framework 4.6.2 (Web Installer)
- Microsoft Visual Studio 2010 Tools for Office Runtime (VSTOR 2010) Redistributable (x86)
- Microsoft Visual Studio 2010 Tools for Office Runtime (VSTOR 2010) Redistributable (x64)

23.3.2 Scope and Configure SAP Cloud for Customer Add-In for Microsoft Outlook

Administrators can configure this add-in using scoping, scoping questions, fine-tuning, and settings in the add-in itself.

23.3.2.1 Enable Microsoft Outlook

Administrators can add *Microsoft Outlook* to your project scope.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* ◼ . Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Sales* 〉 *Account and Activity Management* 〉 *Activity Management* ◼ and check the box next to the scoping question for integration of local e-mail applications.

23.3.2.2 Configure Download of Individual Customers to Microsoft Outlook

To allow download of individual customers from SAP Cloud for Customer to Microsoft Outlook, administrators must maintain the required configuration in SAP Cloud for Customer as well as in Microsoft Outlook. After defining these settings, add your contacts to Microsoft Outlook to ensure that they are synchronized.

Context

> ⚠ Caution
>
> The employee (user) must belong to the account team of an individual customer for the individual customer to be downloaded to the outlook client. However, this condition does not apply when individual customers are downloaded by looking-up and using e-mail address.

Procedure

1. Make settings in SAP Cloud for Customer.

    The following controls are provided in the system to enable or disable download of individual customers to Microsoft Outlook. Note that these settings are controlled by an administrator business role and override the settings made in Microsoft Outlook.

    1. Log on as an administrator and choose ▶ *Administrator* 〉 *General Settings* 〉 *Users* 〉 *Business Roles* 〉.
    2. Set the filter to show all active business roles.
    3. Select and edit the role for which you want to provide access. In the *FIELDS & ACTIONS* tab for the role, verify if the following fields are set to *Unrestricted*:
        `GW_INDIVIDUAL_CUSTOMERS` - If you select this checkbox, a new folder for *SAP Cloud for Customer: Individual Customers* is displayed in the *Contacts* dashboard of Microsoft Outlook.
    4. Save your settings.
2. In Microsoft Outlook, in the toolbar for SAP Cloud for Customer Microsoft Outlook Add-In, click *Settings* and select the checkbox for *Enable Individual Customers*.

    > i Note
    >
    > If you disable this setting, the individual customer contacts from SAP Cloud for Customer are no longer available in Microsoft Outlook. However, all data created for this user can be accessed whenever the download of individual customers is enabled again.

23.3.2.3 Configure a Default Profile for Microsoft Outlook

Administrators can define a default profile for all users who use the SAP Cloud for Customer Add-In for Microsoft Outlook.

Context

You can send around guidelines for users to set up their profiles for the add-in. However, it may be easier to simply define a default profile for your company. Users can then adapt it to their own workstyle later, if they choose.

Procedure

1. Go to ▌▶ *Administrator* ❯ *Groupware Add-In Settings* ▌.

   The settings you see are the same ones that can be made directly in the add-in.
2. Make the settings to define the default profile for the add-in for all users at your company.
3. Save your settings.

   When your company upgrades to the next release and as each user logs on, your default profile overwrites any settings they may have made previously.

23.3.2.4 Configure - Prevent Synchronization of E-Mail Marked as Private or Confidential

As an administrator, you can set up your system to exclude e-mail marked as either private or e-mail marked as confidential from being synchronized to SAP Cloud for Customer.

Context

To make this setting, do the following:

Procedure

1. Log on as an administrator and go to ▌▶ *Administrator* ❯ *General Settings* ❯ *Groupware Add-In Settings* ❯ *Microsoft Outlook* ❯ *General Settings* ❯ *Sync Settings* ▌ and choose whether you want to exclude confidential e-mail, private e-mail, or both from synchronization.

2. Choose whether you want to exclude confidential e-mail, private e-mail, or both from synchronization.

23.3.2.5 Configure - Prevent Synchronization of Notes and Attachments for Visits and Appointments

As an administrator, you can set up your system to prevent notes and attachments from being synchronized to and from SAP Cloud for Customer for appointments and visits.

Context

> ### i Note
>
> These settings always affect both appointments and visits. For example, it is not possible to prevent synchronization for appointments and not for visits.

To make this setting, do the following:

Procedure

1. Log on as an administrator and choose ▶ *Administrator* ❯ *General Settings* ❯ *Users* ❯ *Business Roles* ❯.
2. Use the filter to show all active business roles.
3. Select and edit the role for which you want to prevent synchronization of notes and attachments.
4. In the user role, add the appropriate business action restriction:
   - To prevent synchronization of attachments for appointments and visits (GW_APPT_ATTACH_UPLOAD_DOWNLOAD)
   - To prevent synchronization of notes for appointments and visits (GW_APPT_NOTES_UPLOAD_DOWNLOAD)

23.3.2.6 Configure - Create Visits by Default

If you are using the SAP Cloud for Customer Add-In for Microsoft Outlook, as the administrator, you can set your system to select the *Visit* indicator by default for all new appointments that are created from Microsoft Outlook.

If your users primarily create visits instead of appointments, as the administrator, you can enable the default *Visit* checkbox by logging on as an administrator and choosing ▶ *Administrator* ❯ *Groupware Add-In Settings* ❯ *Microsoft Outlook* ❯ *General Settings* ❯ *Create appointments in Microsoft Outlook as visits by default (users can change as necessary)* ❯.

> **i Note**
>
> Users can change this setting manually, so if they create visits often and only create appointments occasionally, they can just deselect this indicator to create an appointment.

23.3.2.7 Configure SAP System URL for All Users at Initial Logon

As the administrator, you can push the SAP solution URL to all users for initial logon. Predefining the URL streamlines the process and eliminates confusion and errors due to typos as users enter the URL manually.

Context

When users have logged on to the SAP Cloud for Customer Add-In for Microsoft Outlook before, URLs that were used previously appear for selection. However, for users who are logging on for the first time, there is no history. Pushing the URL for the SAP solution to all users provides a default URL for users at initial logon.

Procedure

1. Predefine the URL in one of the following ways:
   - In the *Microsoft Windows Registry Editor*, create a new registry entry for the server URL:
     1. Go to `HKEY_CURRENT_USER\SOFTWARE\SAP\Business ByDesign FrontEnd\CD\ServerConfig`.
     2. Insert a new string value with name *ServerAddress* and data containing the domain URL.
   - On your local machine, add the following line to *config.properties*: **ServerUrl=<your server's url>**

     > **i Note**
     >
     > The *config.properties* file is found under `C:\Users\<your user>\AppData\Local\SAP\C4C\config`.
     >
     > You can copy your server's URL from the *Microsoft Windows Registry Editor* under ▌ *SAP* ❯ *Business ByDesign Front End* ❯ *CD* ❯ *ServerConfig* ▐. The address appears in the *ServerAddress* row in the *Data* column and ends in `ondemand.com`.

2. Save your changes.

Results

When users log on to the add-in from Microsoft Outlook for the first time, your tenant's URL appears by default.

23.3.2.8 Configure Remote Installation of Add-In with MSI File

In addition to each end user being able to install the add-in manually, administrators can use an MSI file to install the add-in on multiple clients remotely.

Context

To download the MSI file, do the following:

Procedure

1. As an administrator, you can download the MSI file from the SAP Software Download Center at https://support.sap.com/software/installations.html🔗.
2. Search for `C4C_OUTLK_ADDIN_MSI` and download it.

Example

For example, you could use the following command line for silent installation:

```
>> msiexec  /i   <path to msi>  /quiet
```

23.3.2.9 Configure - Synchronize Phone Calls in Microsoft Outlook

As an administrator, you can make settings so that phone calls are synchronized from the SAP solution to users' calendars in Microsoft Outlook.

Log on as an administrator and enable this feature under ▐▶ *Administrator* ❯ *General Settings* ❯ *Groupware Add-In Settings* ❯ *Microsoft Outlook* ❯ *General Settings* ◀▌.

23.3.3 Set Up SAP Cloud for Customer Add-In for Microsoft Outlook

Each user who wants to use SAP Cloud for Customer functions from Microsoft Outlook must install the add-in on his or her computer. In some companies, administrators install it centrally for all users.

23.3.3.1 Install or Update the Add-In for Microsoft Outlook Integration

If your administrator has not installed the add-in centrally, you'll need to install it manually on your computer. To update the add-in, follow the same procedure. To download the add-in, you must have administrative rights on the computer.

Prerequisites

To avoid compatibility issues with previous releases, make sure that you have installed the latest version of the add-in.

Procedure

1. In SAP Cloud for Customer, choose *Download*.

2. Choose the download link for the add-in for Microsoft Outlook.

3. Install the add-in.

    Follow the instructions in the installation wizard.

4. Restart Microsoft Outlook to activate the add-in.

    When you restart Microsoft Outlook, SAP Cloud for Customer appears on your Microsoft Outlook screen as a separate tab in the ribbon.

23.3.3.2 Configure Remote Installation of Add-In with MSI File

In addition to each end user being able to install the add-in manually, administrators can use an MSI file to install the add-in on multiple clients remotely.

Context

To download the MSI file, do the following:

Procedure

1. As an administrator, you can download the MSI file from the SAP Software Download Center at https://support.sap.com/software/installations.html .
2. Search for `C4C_OUTLK_ADDIN_MSI` and download it.

Example

For example, you could use the following command line for silent installation:

```
>> msiexec /i  <path to msi> /quiet
```

23.3.3.3 Configure SAP System URL for All Users at Initial Logon

As the administrator, you can push the SAP solution URL to all users for initial logon. Predefining the URL streamlines the process and eliminates confusion and errors due to typos as users enter the URL manually.

Context

When users have logged on to the SAP Cloud for Customer Add-In for Microsoft Outlook before, URLs that were used previously appear for selection. However, for users who are logging on for the first time, there is no history. Pushing the URL for the SAP solution to all users provides a default URL for users at initial logon.

Procedure

1. Predefine the URL in one of the following ways:
   - In the *Microsoft Windows Registry Editor*, create a new registry entry for the server URL:
     1. Go to `HKEY_CURRENT_USER\SOFTWARE\SAP\Business ByDesign FrontEnd\CD\ServerConfig`.
     2. Insert a new string value with name *ServerAddress* and data containing the domain URL.
   - On your local machine, add the following line to *config.properties*: **ServerUrl=<your server's url>**

   > **i Note**
   >
   > The *config.properties* file is found under `C:\Users\<your user>\AppData\Local\SAP\C4C\config`.
   >
   > You can copy your server's URL from the *Microsoft Windows Registry Editor* under ▶ *SAP* ▶ *Business ByDesign Front End* ▶ *CD* ▶ *ServerConfig* ▶. The address appears in the *ServerAddress* row in the *Data* column and ends in `ondemand.com`.

2. Save your changes.

Results

When users log on to the add-in from Microsoft Outlook for the first time, your tenant's URL appears by default.

23.3.3.4 Make Settings for SAP Cloud for Customer Add-In for Microsoft Outlook

Customize the add-in to your working style by using the settings.

Procedure

1. Enable the side pane in Microsoft Outlook by enabling the add-in SAP Cloud for Customer.
2. As a user, you can make these settings locally from Microsoft Outlook. In the SAP Cloud for Customer section of the ribbon, choose *Settings*.

   > **i Note**
   >
   > As an administrator, you can make some of these settings globally and cascade them to all users. To do so, log on to your system as an administrator and choose ▶ *Administrator* ▶ *General Settings* ▶ *Groupware Add-In Settings* ▶ *Microsoft Outlook* ▶.

3. Under *Side Panel Options*, define the statuses of each item that you want to appear in the side pane.

   By default, the add-in shows activities from the past 30 days. On this tab, you can adjust this setting to display activities up to one year (365 days) in the past.

4. Check the SAP Cloud for Customer folder locations in Microsoft Outlook by choosing *Synchronization Folders*.

   The add-in automatically creates the synchronization folders, including the following:

   ○ *Default Folder*
     This folder is the main folder where error and conflict information is stored.
   ○ *Accounts Folder (only necessary for sales users)*
     This folder contains the accounts downloaded from SAP Cloud for Customer.
   ○ *Contacts Folder (only necessary for sales users)*
     This folder contains the contacts downloaded from SAP Cloud for Customer.

   To change any of these folders, click the folder link, select a new folder, and choose OK.

5. In the *Notifications/Errors* section, define how and in which cases the system should notify you.

6. If you are a service agent using Microsoft Outlook to reply to tickets, under *Service*, you can enable the service scenario. Additionally, you can define a default account to use when you reply to tickets.

7. Under *Proxy Settings*, define the default proxy settings that the system should use.

23.3.3.5 Configure a Default Profile for Microsoft Outlook

Administrators can define a default profile for all users who use the SAP Cloud for Customer Add-In for Microsoft Outlook.

Context

You can send around guidelines for users to set up their profiles for the add-in. However, it may be easier to simply define a default profile for your company. Users can then adapt it to their own workstyle later, if they choose.

Procedure

1. Go to ❘▶ *Administrator* ▶ *Groupware Add-In Settings* ❘.

   The settings you see are the same ones that can be made directly in the add-in.

2. Make the settings to define the default profile for the add-in for all users at your company.

3. Save your settings.

   When your company upgrades to the next release and as each user logs on, your default profile overwrites any settings they may have made previously.

23.3.3.6 Uninstall the Add-In for Microsoft Outlook Integration

If you no longer want to use the SAP Cloud for Customer Add-In for Microsoft Outlook, you can uninstall it.

Context

> i Note
>
> If you want to update your add-in, there is no need to uninstall it. Just update the add-in.

Procedure

1. On your computer, from your list of installed programs, uninstall the add-in for Microsoft Outlook.
2. In Microsoft Outlook, find the folder that has the same title as the SAP solution and delete it.

Related Information

Install or Update the Add-In for Microsoft Outlook Integration [page 943]

23.3.4 Get Started

The SAP Cloud for Customer Add-In for Microsoft Outlook allows you to exchange information between Microsoft Outlook and SAP Cloud for Customer. After installing the add-in, you can do the tasks listed below right from Microsoft Outlook.

Prerequisites

You have installed the SAP Cloud for Customer Add-In for Microsoft Outlook locally on your computer and made the appropriate settings.

Related Information

Set Up SAP Cloud for Customer Add-In for Microsoft Outlook [page 943]

23.3.4.1 Requirements for SAP Cloud for Customer Add-In for Microsoft Outlook (Version 4.0 or Higher)

Microsoft Outlook versions supported by the add-in and required frameworks and packages.

> i Note
>
> Don't use both the client-side and the server-side add-in for Microsoft Outlook. If you decide to use SAP Cloud for Customer, server-side integration for Microsoft Outlook, uninstall the SAP Cloud for Customer Add-In for Microsoft Outlook.

- Microsoft Office support:

Outlook Version	Types Supported
Outlook 2019	○ Office 365 ○ Office 2019
Outlook 2016	○ Office Professional Plus ○ Office 365 ProPlus
Outlook 2013 (32 Bit or 64 Bit)	○ Office Professional Plus ○ Office 365 ProPlus
Outlook 2010 (32 Bit or 64 Bit)	○ Office Professional Plus ○ Professional ○ Standard

> i Note
>
> Microsoft Exchange 2010 and 2013 are supported.

- Microsoft .Net Framework 4.6.2 (Web Installer)
- Microsoft Visual Studio 2010 Tools for Office Runtime (VSTOR 2010) Redistributable (x86)
- Microsoft Visual Studio 2010 Tools for Office Runtime (VSTOR 2010) Redistributable (x64)

23.3.4.2 Log On to SAP Cloud for Customer From Microsoft Outlook

If single sign-on (SSO) is not enabled, log on manually.

Context

If your administrator has set up single sign-on (SSO), you are logged on automatically and the SAP Cloud for Customer sidebar appears. If you don't see the SAP Cloud for Customer sidebar in Microsoft Outlook, log on manually like this:

Procedure

1. In Microsoft Outlook, under SAP Cloud for Customer, click the button to log on to SAP Cloud for Customer.
2. If your administrator has predefined the system, it appears in field *SAP System URL*. If the field is blank, select or manually type in the URL for your SAP Cloud for Customer system and choose *OK*.

   The logon is certificate-based and runs automatically in the background.

   Your Microsoft Outlook is now connected with the SAP Cloud for Customer system that you selected.
3. If there is a problem with the certificate for your user, or if you are not working with certificates, the solution requires you to enter your user ID and password.

   > **i Note**
   >
   > Under *Settings*, if you choose the option for remembering your password and automatic logon, you stay logged on automatically with the same user name and password in the system. If the logon fails, for example if you change your password, automatic logon is disabled to avoid locking you out. In that case, simply log on with your new password and set the automatic logon option again.

   You can confirm that you have logged on to the system by checking the title of the button that you used to log on. If the text has switched to *Log Off*, you have logged on successfully.

   > **→ Recommendation**
   >
   > If you are logged on to SAP Cloud for Customer with the add-in for many hours without any action, you may receive an authorization error when trying to use a Microsoft Outlook integration function. In this case, your user cookies may have expired. Simply log off and log on again.

4. Enter your URL in the *SAP System* field, leaving out the path or directory information at the end of the URL.

   For example, you log on with URL `http://Test.sap.corp:7000`, and not `http://Test.sap.corp:7000/irj/portal`.

   > **i Note**
   >
   > When you are working offline and cannot log on to the system, any changes to relevant e-mails, appointments, and tasks, or new items for synchronization to SAP Cloud for Customer are kept in a pool in Microsoft Outlook. Actual synchronization of these items occurs automatically as soon as you log on to SAP Cloud for Customer using the add-in.

23.3.4.3 View Information from SAP Cloud for Customer

When you select an e-mail, the add-in automatically recognizes e-mails from customers defined as contacts in your SAP solution, based on e-mail address. Information related to that contact and account appears in the side pane. You can access contact and account information, as well as related opportunities, leads, sales orders, tickets, and activities for the current week, and you can personalize how you would like to view the content.

23.3.4.4 Pagination and Sorting

In the SAP Cloud for Customer Add-In for Microsoft Outlook, items that appear in the side pane are organized into pages that contain 100 items.

Page numbers appear in the footer of each list. To navigate between pages, use the arrows.

When you click a column header, the system sorts the contents of one page.

On the *Shelf*, items are sorted by name in ascending order. Use the ≣ (*Sort*) button to define a different default sort order for your shelf.

23.3.4.5 Search in the Side Pane

Use the search field to find objects that were added as references to the contact that appears in the side pane.

Procedure

1. Open Microsoft Outlook, log on to the add-in, and expand the side pane.
2. Enter the ID of the object in the search field.

Results
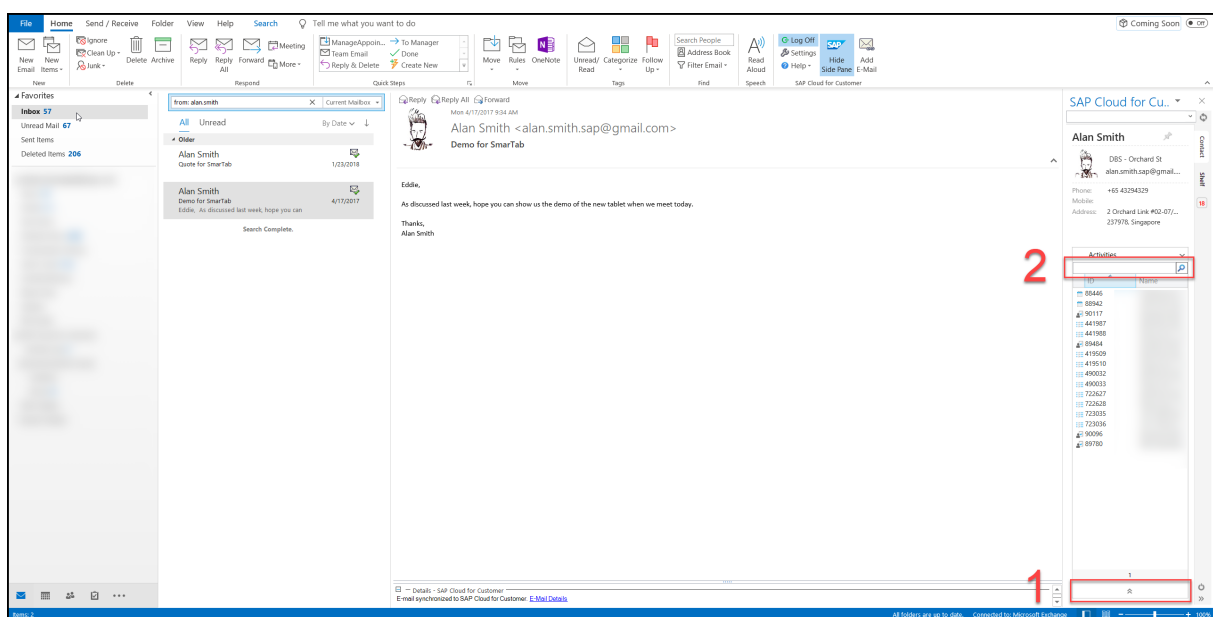
23.3.4.6 Work with Feed Updates

If you use the native feed, you can see and work with feed posts right from your inbox.

> **i Note**
>
> If you enable SAP Jam in SAP Cloud for Customer, the feed tab in the Microsoft Outlook side pane displays the last feeds before you switched to SAP Jam. It is not possible to see feed posts from SAP Jam in the side pane at this time.

When you select *Feed* in the side pane, you can do the following:

- Display the feed updates that are in SAP Cloud for Customer for the relevant contact and account.
- Enter a new feed update just like you would in the SAP solution.
  Feed updates are synchronized automatically, so your feed update also appears in SAP Cloud for Customer.

  > **i Note**
  >
  > A feed update entered for an account references the account, and a feed update entered for a contact references the contact, similar to entering a feed update in the account or contact item view.

- Enter comments on a feed update.
- Repost a feed update.
- Accept or decline a follow request.
- Click a link to go to SAP Cloud for Customer.

23.3.4.7 Display Synchronization Details for an Item

If you want to know the status of the synchronization process, you can display the details from your inbox.

Procedure

1. Open the item in Microsoft Outlook.
2. In the lower frame of the item, in the *Details — SAP Cloud for Customer* section, click the link.

23.3.4.8 Capture HTTP Traces

To provide more information during incident handling, you can enable HTTP tracing.

You can find this option in Microsoft Outlook in the add-in bar under ▶ *Help* ▶ *Enable HTTP Tracing* ▶.

23.3.5 Manage Contacts

With SAP Cloud for Customer Add-In for Microsoft Outlook, you can create contacts, associate them with other objects in your SAP system, pin them, and even add contacts from your SAP solution into Microsoft Outlook.

23.3.5.1 Create Accounts and Contacts

You can create accounts and contacts right from your inbox. At the next synchronization, they appear in your SAP solution.

Context

To separate personal data from business data in Microsoft Outlook, the add-in creates separate folders for accounts and contacts in SAP Cloud for Customer.

i Note

The user who creates and synchronizes a new account from Microsoft Outlook is automatically the owner for that account.

i Note

The ability to create and synchronize accounts and contacts depends on your system authorizations, as well as your synchronization settings. If you have any questions or difficulties, contact your administrator.

Procedure

1. In Microsoft Outlook, go to your contacts and select the contacts folder for SAP Cloud for Customer.

   i Note

   Creating contacts from the SAP Cloud for Customer folder ensures that your business and personal contacts stay separate.

2. Choose *New Contact*.

3. Enter the information for the contact person.

4. As you enter a new contact, you can check for duplicates.

   If a contact with a similar name, e-mail, or address is found in your system, you can download it into Outlook.

5. Under SAP Cloud for Customer, choose *Add Contact*. In the screen that appears, search for and select an existing account.

6. If the account that you need does not exist, create a new account by entering information in the required fields.

   You cannot edit accounts in Microsoft Outlook. If you must update an account, open your SAP solution and update it there.

7. Assign the account to the contact and save your entries.

   > **i Note**
   >
   > Accounts created directly in the *Accounts from SAP Cloud for Customer* folder cannot be synchronized. Accounts can only be created from the contact area. However, once the account is created in the system, after the next synchronization, it appears in the accounts folder.

8. To synchronize this contact and its associated account with SAP Cloud for Customer, choose ▶ *Add Contact* ▶ *Submit* ▶.

Related Information

23.3.5.2 Improved Address Handling

Confirm Microsoft Outlook exchange street and house number data.

In SAP Cloud for Customer, you enter data in two fields; one for the street name and the other for the house number. In Groupware, there is only one field for street address (includes the street name and house number). Modify the Groupware street address to avoid an empty street number in SAP Cloud for Customer.

23.3.5.3 View Contact Data

The details for a linked e-mail include contact information.

In the message that appears at the bottom of the screen after an e-mail was synchronized with your SAP solution, there is a link to details. The information behind this link now includes contact information. If the contact was synchronized with your local Microsoft Outlook client, the contact's name also appears in the dialog box.

To see all available contact information in the SAP solution, click the link.

23.3.5.4 Easily Associate Contacts and Accounts with Drag and Drop

If you are using the SAP Cloud for Customer Add-In for Microsoft Outlook, you can drag and drop contacts into accounts.

In Microsoft Outlook under *Contacts*, when you open the contacts folder for SAP Cloud for Customer in any view other than *People* view, the add-in side panel appears. From the side panel, you can search for an account and then associate a contact with that account by using drag and drop. Your association of the contact to an account is synchronized with the SAP solution.
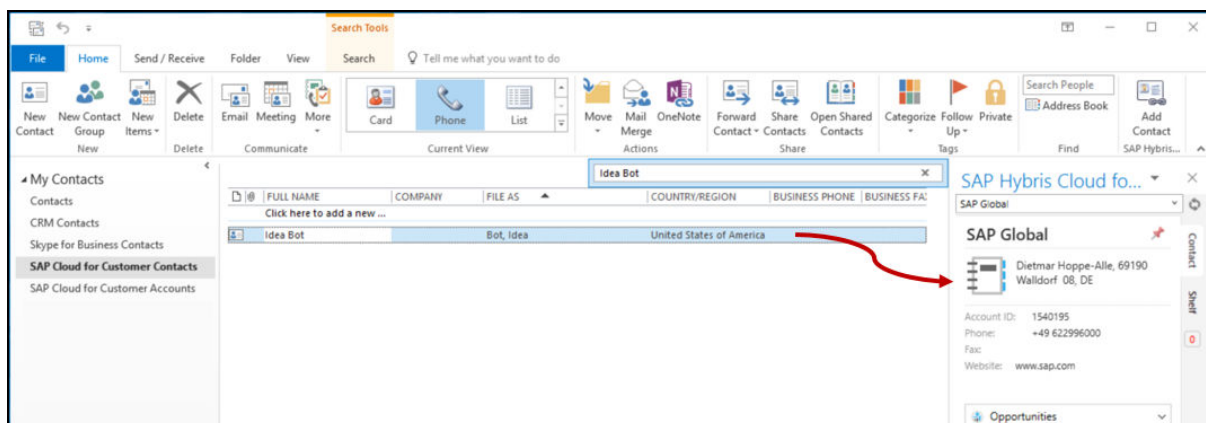
23.3.5.5 Pin Contact Information in the Side Pane

You can keep information appearing in the side pane, even when you select another object, by pinning it.

Context

When you select an e-mail in your inbox from an SAP Cloud for Customer contact, the information for that contact appears in the side pane. Selecting a message from a different SAP Cloud for Customer contact updates the information in the side pane.

If you want the information for a specific contact to remain available in the side pane, pin that information as follows:

Procedure

1. When the information that you want to stay in the side pane appears in the side pane, click the pin icon at the top of the side pane to keep this contact information available while you select other e-mail messages.
2. Click the pin icon again to unpin the information, allowing the side pane to dynamically update contact information based on the message that you select.

23.3.5.6 Save a Visit or an Appointment to Contacts From Search

You can save a visit or appointment to contacts from outlook add-in search results.

If the visit or appointment attendees in outlook aren't recognized by the add-on, you can manually look up a contact within the side-pane and save the visit or appointment.

> i Note
>
> You can't add emails to contacts from search.

23.3.5.7 Add Contacts from SAP Cloud for Customer into Microsoft Outlook

You can download all of your contacts from the SAP solution into Microsoft Outlook at once, or one at a time.

Context

There are a few different ways to download your contact information from your SAP solution into Microsoft Outlook. Here they are:

- Download all your contacts from the system to Microsoft Outlook at once like this:
  1. In the SAP Cloud for Customer Add-In toolbar, choose *Settings*.
  2. If you want the contacts that you download to be updated if changes are made, choose *Keep Contacts Synchronized*.
     If you skip this setting, the contacts are downloaded but not updated.

     > i Note
     >
     > Contacts without accounts and new contacts and accounts may not be updated to Microsoft Outlook automatically, even if you made this setting. To ensure that these types of contacts are also updated, repeat this step periodically.

  3. Make the appropriate selections for initial synchronization, and choose *Download Contacts*.
     By default, the add-in looks up all accounts under *My Accounts* and downloads all contacts listed for those accounts.

     > i Note
     >
     > If you only want to download contacts that you have added on the *Relationships* tab, use checkbox *Download only the contacts with whom I have established relationships*.

- Download individual contacts manually like this:
  1. In Microsoft Outlook, on the SAP Cloud for Customer side pane, on the *Contacts* tab, search for a contact name.

A list of contacts found in SAP Cloud for Customer appears in the side pane.

2. Select the contact that you want to add to your contacts in Microsoft Outlook and choose ✦.

- Download individual contacts automatically like this:

    1. In the SAP Cloud for Customer Add-In toolbar, choose ▶ *Settings* ❯ *Always Copy Contacts* ❯.
    2. When you select an e-mail in your inbox, the SAP solution searches for a match to the e-mail address. If it finds a match, it automatically downloads the contact information to your Microsoft Outlook contacts.

Results

The contact information is transferred from SAP Cloud for Customer and appears in your contacts in Microsoft Outlook.

Related Information

Create Accounts and Contacts [page 952]

23.3.5.8 Configure Download of Individual Customers to Microsoft Outlook

To allow download of individual customers from SAP Cloud for Customer to Microsoft Outlook, administrators must maintain the required configuration in SAP Cloud for Customer as well as in Microsoft Outlook. After defining these settings, add your contacts to Microsoft Outlook to ensure that they are synchronized.

Context

> ⚠ Caution
>
> The employee (user) must belong to the account team of an individual customer for the individual customer to be downloaded to the outlook client. However, this condition does not apply when individual customers are downloaded by looking-up and using e-mail address.

Procedure

1. Make settings in SAP Cloud for Customer.

The following controls are provided in the system to enable or disable download of individual customers to Microsoft Outlook. Note that these settings are controlled by an administrator business role and override the settings made in Microsoft Outlook.

1. Log on as an administrator and choose ▶ *Administrator* 〉 *General Settings* 〉 *Users* 〉 *Business Roles* 〉.
2. Set the filter to show all active business roles.
3. Select and edit the role for which you want to provide access. In the *FIELDS & ACTIONS* tab for the role, verify if the following fields are set to *Unrestricted*:
   GW_INDIVIDUAL_CUSTOMERS - If you select this checkbox, a new folder for *SAP Cloud for Customer: Individual Customers* is displayed in the *Contacts* dashboard of Microsoft Outlook.
4. Save your settings.

2. In Microsoft Outlook, in the toolbar for SAP Cloud for Customer Microsoft Outlook Add-In, click *Settings* and select the checkbox for *Enable Individual Customers*.

> **i Note**
>
> If you disable this setting, the individual customer contacts from SAP Cloud for Customer are no longer available in Microsoft Outlook. However, all data created for this user can be accessed whenever the download of individual customers is enabled again.

23.3.6 Manage E-Mails

If you use SAP Cloud for Customer Add-In for Microsoft Outlook, you can add e-mails to your SAP solution or add e-mails with reference to other objects right from your inbox.

23.3.6.1 Add E-Mails for Synchronization

Contact information may be associated automatically with another object. However, you can also associate contact information from an e-mail manually.

Context

If you have contact information showing in the SAP Cloud for Customer side pane, you can associate a formatted or unformatted e-mail with an opportunity, lead, sales quote, campaign, or account listed under that contact. Simply drag and drop the e-mail onto the SAP item in the side pane to which you want to associate it.

If you wish to add an e-mail for synchronization and do not have relevant contact information visible in the side pane, proceed as follows:

Procedure

1. In Microsoft Outlook, open an existing e-mail, and under SAP Cloud for Customer, choose *Add E-Mail*.

   > **i Note**
   >
   > You can add one or more e-mails directly, without opening them, by right-clicking on them in your inbox, and choosing *Add E-Mail*.

   > **i Note**
   >
   > When you create an e-mail, you can synchronize and send it by choosing *Send and Add E-Mail*. This step combines the synchronize and send steps, saving you time.

2. Add a reference to an account, if desired.
3. Choose *Submit*.

   An e-mail activity is created in SAP Cloud for Customer, based on information in the Microsoft Outlook e-mail.

Results

The e-mail that you synchronized from Microsoft Outlook appears in SAP Cloud for Customer on the *Activities* tab.

If you added an account, opportunity, contact, or lead as a reference, it also appears in the item view for that item.

Any images in the body of the e-mail appear as attachments in your SAP solution.

23.3.6.2 Add Visits, Appointments, Tasks, and E-Mails with Reference

You can add e-mails, appointments, visits, and tasks with reference to any of your SAP Cloud for Customer accounts, opportunities, or leads.

Context

Visits are technically similar to appointments, and the SAP solution handles them in the same way.

In the following steps, an e-mail activity is used as an example, but the steps are similar for all activity types.

If you have contact information showing in the SAP Cloud for Customer side pane, you can associate an e-mail, visit, appointment, or task to an opportunity, lead, activity, sales quote, sales order, campaign, ticket, or account listed under that contact simply by using drag and drop.

> ### i Note
>
> If you add e-mails from the *Sent* folder, the system uses the recipient from the "TO" line as the reference. If there are multiple recipients, the solution uses the first recipient as account/contact of reference, which you can confirm by using *Get Details*.

If you wish to add an e-mail, appointment, or task for synchronization and don't have relevant contact information visible in the side pane, proceed as follows:

Procedure

1. Add an activity **with reference to an account, campaign, sales order, or sales quote** like this:
   a. In Microsoft Outlook, to synchronize an e-mail to SAP Cloud for Customer, open an e-mail and choose ❚ *SAP Cloud for Customer* ❯ *Add E-Mail* ❚.

   > ### i Note
   >
   > When you use *Add E-Mail*, the system adds the e-mail to the object directly, without referencing an account. If you drag and drop the e-mail onto the object, the system also adds the account reference.

   b. Choose *Add Reference* and select the object to which you want to add the e-mail.

   You can also search for another account and add the e-mail with that account as a reference.

   When you add an e-mail with reference to an account, you can filter the search results by type (account or individual customer). Your filter settings persist until you change them.

   An e-mail activity is created automatically in SAP Cloud for Customer under the account that you chose.

2. Add an activity **with reference to an opportunity or lead** like this:

   > ### i Note
   >
   > To add a reference to an opportunity or lead, add a reference to an account first.

   a. In Microsoft Outlook, to synchronize an e-mail to SAP Cloud for Customer, open an e-mail and choose ❚ *SAP Cloud for Customer* ❯ *Add E-Mail* ❚.
   a. Choose ❚ *Add Reference* ❯ *Account* ❚.
   a. Add a reference to an opportunity or lead.

   When you search for the opportunity or lead, the results list displays the opportunities or leads that are associated with the referenced account.

   a. Select the relevant item from the resulting list.

   The e-mail is copied automatically into SAP Cloud for Customer and appears in the opportunity or lead that you selected.

23.3.6.3 Link Email Appointments to a Sales Order or Sales Quote

You can link email appointments to a sales order or sales quote.

You can search for a sales order or sales quote and link an activity (email, visit or, appointment) to that sales order or sales quote using the groupware add-in. You don't have to open the SAP Cloud for Customer to manually add activity to a sales quote or sales order.

23.3.6.4 Drag and Drop Attachments

In the SAP Cloud for Customer Add-In for Microsoft Outlook, you can drag and drop attachments from an e-mail directly onto an object in the side pane, such as an opportunity or lead. When you open the object in your SAP solution, the attachment appears in the object directly.

23.3.6.5 Remove E-Mails from SAP Cloud for Customer

You can remove an e-mail message from the SAP solution (browser only) if you linked it to the SAP system originally.

When you remove an e-mail from your SAP solution, the e-mail is not deleted: it still exists in Microsoft Outlook. The link to that e-mail is simply removed from SAP Cloud for Customer.

To remove e-mails from SAP Cloud for Customer, under *Activities*, hover over an e-mail and choose *Remove*.

23.3.6.6 Configure - Prevent Synchronization of E-Mail Marked as Private or Confidential

As an administrator, you can set up your system to exclude e-mail marked as either private or e-mail marked as confidential from being synchronized to SAP Cloud for Customer.

Context

To make this setting, do the following:

Procedure

1. Log on as an administrator and go to ▶ *Administrator* 〉 *General Settings* 〉 *Groupware Add-In Settings* 〉 *Microsoft Outlook* 〉 *General Settings* 〉 *Sync Settings* ◀ and choose whether you want to exclude confidential e-mail, private e-mail, or both from synchronization.
2. Choose whether you want to exclude confidential e-mail, private e-mail, or both from synchronization.

23.3.7 Manage Appointments and Visits

If you use the SAP Cloud for Customer Add-In for Microsoft Outlook, you can synchronize appointments and visits so that updates in your SAP solution appear in Microsoft Outlook, and the other way around.

23.3.7.1 Add Visits and Appointments for Synchronization

Appointment information may be associated automatically with other objects. However, you can also associate appointment information manually.

Context

Visits are technically similar to appointments, and the SAP solution handles them in the same way.

> **i** Note
>
> The following is specific to sales:
>
> If you have contact information showing in the SAP Cloud for Customer side pane, you can associate an appointment with an opportunity, lead, activity, sales order, or account listed under that contact simply by

> using drag and drop. The appointment is associated automatically with the lead, opportunity, activity, sales order, or account.

> i Note
>
> You can only synchronize appointments for which you are the organizer. If you are a participant, you receive any updates from the organizer's Outlook appointment.

> i Note
>
> It is not possible to synchronize recurring appointments.

If you wish to add an appointment for synchronization and do not have relevant contact information visible in the side pane, proceed as follows:

Procedure

1. In Microsoft Outlook, open an appointment, and under SAP Cloud for Customer, choose *Add Appointment*.

   > i Note
   >
   > You can add an appointment directly, without opening it, by right-clicking on the appointment in your calendar, and choosing *Add Appointment*.

   > i Note
   >
   > When you create a new appointment, you can synchronize and send it by choosing *Save, Send, and Sync Appointment*. This step combines multiple steps, saving you time.

2. If you want this item to be a visit, select the *Visit* indicator. Otherwise, you are creating an appointment.
3. Add a reference to an account, if desired.
4. Choose *Submit*.

   An appointment activity is created in SAP Cloud for Customer, based on information in the Microsoft Outlook appointment.

5. You can open, create, or edit an appointment in SAP Cloud for Customer as well. To synchronize any future changes to the appointment in SAP Cloud for Customer or in Microsoft Outlook, repeat the preceding steps.

   > → Recommendation
   >
   > If you add or change attendees in an SAP Cloud for Customer appointment, you can send the meeting request as follows:
   > 1. Ensure that the appointment is synchronized, by repeating the preceding steps.
   > 2. Open the appointment in Microsoft Outlook and send the meeting request.

Results

The appointment that you synchronized from Microsoft Outlook appears in SAP Cloud for Customer on the *Activities* tab.

> **i Note**
>
> The following is specific to sales:
>
> If you added an account, opportunity, contact, or lead as a reference, it also appears in the item view for that item.

23.3.7.2 Configure Synchronization of Visits Only

As an administrator, you can define for certain users that only visits (and not appointments) are synchronized with their SAP solution.

Context

If you have a group of users who only need visits to be updated in their SAP solution, you can define business action restrictions for their business role.

> **i Note**
>
> This setting is only valid for appointments that are created after this setting is made. Any appointments that were synchronized previously are still synchronized.

Procedure

1. Log on as an administrator and go to ▌▶ *Administrator* ❯ *General Settings* ❯ *Business Roles* ❯.
2. Select the business role in which you want to limit synchronization to visits only and choose *View All*.
3. Under *Business Action Restrictions*, add a row and add one or both of the following restrictions:

   ○ `GW_APPT_ONLY_UPLOAD`
   To sync only visits from the SAP solution to Microsoft Outlook, you must block the solution from uploading appointments. To do so, add this restriction and disable it.

   ○ `GW_APPT_ONLY_DOWNLOAD`

23.3.7.3 Configure - Prevent Synchronization of Notes and Attachments for Visits and Appointments

As an administrator, you can set up your system to prevent notes and attachments from being synchronized to and from SAP Cloud for Customer for appointments and visits.

Context

> **i Note**
>
> These settings always affect both appointments and visits. For example, it is not possible to prevent synchronization for appointments and not for visits.

To make this setting, do the following:

Procedure

1. Log on as an administrator and choose ▌▶ *Administrator* ❯ *General Settings* ❯ *Users* ❯ *Business Roles* ▌.
2. Use the filter to show all active business roles.
3. Select and edit the role for which you want to prevent synchronization of notes and attachments.
4. In the user role, add the appropriate business action restriction:
   - To prevent synchronization of attachments for appointments and visits (GW_APPT_ATTACH_UPLOAD_DOWNLOAD)
   - To prevent synchronization of notes for appointments and visits (GW_APPT_NOTES_UPLOAD_DOWNLOAD)

23.3.7.4 Configure - Create Visits by Default

If you are using the SAP Cloud for Customer Add-In for Microsoft Outlook, as the administrator, you can set your system to select the *Visit* indicator by default for all new appointments that are created from Microsoft Outlook.

If your users primarily create visits instead of appointments, as the administrator, you can enable the default *Visit* checkbox by logging on as an administrator and choosing ▌▶ *Administrator* ❯ *Groupware Add-In Settings* ❯ *Microsoft Outlook* ❯ *General Settings* ❯ *Create appointments in Microsoft Outlook as visits by default (users can change as necessary)* ▌.

> **i Note**
>
> Users can change this setting manually, so if they create visits often and only create appointments occasionally, they can just deselect this indicator to create an appointment.

23.3.7.5 Add Visits, Appointments, Tasks, and E-Mails with Reference

You can add e-mails, appointments, visits, and tasks with reference to any of your SAP Cloud for Customer accounts, opportunities, or leads.

Context

Visits are technically similar to appointments, and the SAP solution handles them in the same way.

In the following steps, an e-mail activity is used as an example, but the steps are similar for all activity types.

If you have contact information showing in the SAP Cloud for Customer side pane, you can associate an e-mail, visit, appointment, or task to an opportunity, lead, activity, sales quote, sales order, campaign, ticket, or account listed under that contact simply by using drag and drop.

> **i Note**
>
> If you add e-mails from the *Sent* folder, the system uses the recipient from the "TO" line as the reference. If there are multiple recipients, the solution uses the first recipient as account/contact of reference, which you can confirm by using *Get Details*.

If you wish to add an e-mail, appointment, or task for synchronization and don't have relevant contact information visible in the side pane, proceed as follows:

Procedure

1. Add an activity **with reference to an account, campaign, sales order, or sales quote** like this:

   a. In Microsoft Outlook, to synchronize an e-mail to SAP Cloud for Customer, open an e-mail and choose ▶ *SAP Cloud for Customer* ❯ *Add E-Mail* ▶.

      > **i Note**
      >
      > When you use *Add E-Mail*, the system adds the e-mail to the object directly, without referencing an account. If you drag and drop the e-mail onto the object, the system also adds the account reference.

   b. Choose *Add Reference* and select the object to which you want to add the e-mail.

      You can also search for another account and add the e-mail with that account as a reference.

      When you add an e-mail with reference to an account, you can filter the search results by type (account or individual customer). Your filter settings persist until you change them.

   An e-mail activity is created automatically in SAP Cloud for Customer under the account that you chose.

2. Add an activity **with reference to an opportunity or lead** like this:

> **i Note**
>
> To add a reference to an opportunity or lead, add a reference to an account first.

a. In Microsoft Outlook, to synchronize an e-mail to SAP Cloud for Customer, open an e-mail and choose ▶ *SAP Cloud for Customer* ❯ *Add E-Mail* ▶.

a. Choose ▶ *Add Reference* ❯ *Account* ▶.

a. Add a reference to an opportunity or lead.

   When you search for the opportunity or lead, the results list displays the opportunities or leads that are associated with the referenced account.

a. Select the relevant item from the resulting list.

The e-mail is copied automatically into SAP Cloud for Customer and appears in the opportunity or lead that you selected.

23.3.7.6 See Visits Linked with Tasks

For tasks in SAP Cloud for Customer Add-In for Microsoft Outlook, you can see details about associated visits after the task is synchronized.

Following synchronization, click the *Task Details* link. Details about the associated visits appear. The visit ID is a link that allows you to navigate to the visit directly in SAP Cloud for Customer.
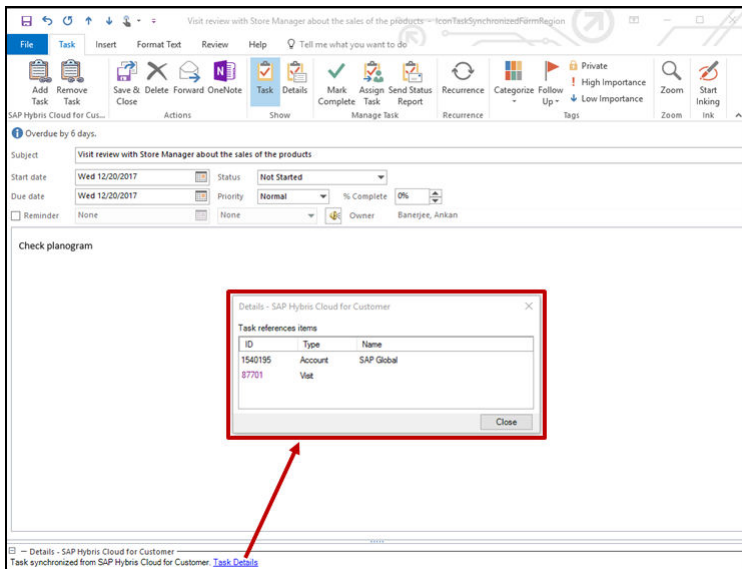
23.3.7.7 Notification of Canceled Appointment Appears in Microsoft Outlook

If you are the owner of an appointment and the appointment is canceled in the SAP solution, a notification appears in your Microsoft Outlook.

23.3.7.8 Status Sync of Canceled Meetings in Microsoft Outlook

When you cancel meetings in Microsoft Outlook, the canceled status is synchronized with SAP Cloud for Customer.

Unlike deleted visits or appointments, canceled visits or appointments still appear in the SAP solution, which means you can use them to track visits or appointments that were originally scheduled but not completed.

The synchronization and status vary slightly, depending on the situation:

- Organizer cancels a synchronized meeting in Microsoft Outlook
  As the organizer of the meeting, open the meeting request in Microsoft Outlook and choose ▶ *Cancel Meeting* ❭ *Send Cancellation* ❭.
  Result: The status of the meeting in the SAP system is *Canceled*.

  > i Note
  >
  > For meetings that happened in the past, there is no need to send a cancellation, so only choose *Cancel Meeting*.

- Someone other than the organizer deletes a synchronized meeting in SAP Cloud for Customer

  > i Note
  >
  > **Prerequisites**
  >
  > - All attendees have e-mail addresses mapped to their contacts in the SAP system
  > - Meeting request has been sent to all attendees previously

  1. If you are someone other than the organizer, open the appointment in the SAP system and choose ▶ *Actions* ❭ *Set as Canceled* ❭.
  2. Following synchronization, in Microsoft Outlook, in the system tray, the organizer must click the SAP icon and choose *Send Meeting Requests to Attendees*.
  3. Select the meeting that you want to cancel and choose *Send*.

> i Note
>
> In SAP Cloud for Customer, you can edit a meeting that has already been canceled. However, if the cancellation was already sent to attendees in Outlook, the changes cannot be synchronized to Microsoft Outlook.

23.3.7.9 Delete Visits, Appointments, or Tasks

When you delete visits, appointments, or tasks, there is no longer a record of them in the SAP solution.

Context

Visits are technically similar to appointments, and the SAP solution handles them in the same way.

> **i Note**
>
> Unlike deleted visits or appointments, canceled visits or appointments still appear in the SAP solution. As a result, you can use canceled visits or appointments to track visits or appointments that were originally scheduled but not completed.

In the steps listed below, an appointment is used as an example, but the steps are similar for visits, appointments, and tasks.

Procedure

1. In Microsoft Outlook, open the appointment you want to delete.

   > **i Note**
   >
   > You can only synchronize appointments for which you are the organizer. If you are a participant, you receive any updates from the organizer's Microsoft Outlook appointment.

2. Choose ▶ *SAP Cloud for Customer* ❯ *Delete Appointment* ▶.
   You can only delete appointments or tasks that have been synchronized.

Results

For appointments and tasks that were previously synchronized, the deletion is synchronized in both Microsoft Outlook and SAP Cloud for Customer. There is no longer a record of them in the SAP solution.

23.3.8 Manage Tasks

If you use the SAP Cloud for Customer Add-In for Microsoft Outlook, you can add tasks, see visits that are linked with tasks, and delete tasks.

23.3.8.1 Add Tasks for Synchronization

Task information may be associated automatically with another object. However, you can also associate task information manually.

Context

All of your tasks are bi-directionally synchronized between Microsoft Outlook and your SAP solution.

Tasks are synchronized for the **processor only** (defined in your SAP solution).

> → Recommendation
>
> After a task is synchronized with Microsoft Outlook, we recommend that you avoid changing the processor in your SAP solution and in Microsoft Outlook. If you change the processor at this point, the task appears in the calendars of both users, but any updates only appear in the current processor's calendar.

> i Note
>
> Advanced features of task management in Microsoft Outlook, such as assigning tasks to others, are not supported and lead to problems.

> i Note
>
> The following is specific to sales:
>
> If you have contact information showing in the SAP Cloud for Customer side pane, you can associate a task with an opportunity, lead, sales order, activity, or account listed under that contact simply by using drag and drop. The task is associated automatically with the lead, opportunity, sales order, activity, or account.

> i Note
>
> Future tasks and tasks within the last 30 days are synchronized and appear in Microsoft Outlook. Tasks older than 30 days are no longer synchronized.

If you wish to add a task for synchronization and do not have relevant contact information visible in the side pane, proceed as follows:

Procedure

1. In Microsoft Outlook, open a task in your *To-Do List* and choose ▶ *SAP Cloud for Customer* ❯ *Add Task* ❯ .

   In the task details, if you enter a name in the *Company Name* field, it is used as the account name in the system. Similarly, if you create a task in the system and synchronize it to Microsoft Outlook, the account name appears in the task details as the company name.

2. Add a reference to an account, lead, or opportunity, if desired.

3. Choose *Submit*.

   A task activity is created in SAP Cloud for Customer, based on information in the Microsoft Outlook task.

4. You can open, create, or edit a task in SAP Cloud for Customer as well.

   > **i** Note
   >
   > If you change a task in SAP Cloud for Customer, the changes are automatically synchronized to Microsoft Outlook within 5 minutes. However, if you change a task in Microsoft Outlook that has already been synchronized, there is no automatic synchronization. In this case, open the task in Microsoft Outlook, make your changes, and then choose *Add Task* to trigger synchronization to SAP Cloud for Customer.

Results

The task that you synchronized from Microsoft Outlook appears in SAP Cloud for Customer on the *Activities* tab.

If you added an account, opportunity, contact, sales order, activity, or lead as a reference, it also appears in the item view for that item.

23.3.8.2 Add Visits, Appointments, Tasks, and E-Mails with Reference

You can add e-mails, appointments, visits, and tasks with reference to any of your SAP Cloud for Customer accounts, opportunities, or leads.

Context

Visits are technically similar to appointments, and the SAP solution handles them in the same way.

In the following steps, an e-mail activity is used as an example, but the steps are similar for all activity types.

If you have contact information showing in the SAP Cloud for Customer side pane, you can associate an e-mail, visit, appointment, or task to an opportunity, lead, activity, sales quote, sales order, campaign, ticket, or account listed under that contact simply by using drag and drop.

> **i Note**
>
> If you add e-mails from the *Sent* folder, the system uses the recipient from the "TO" line as the reference. If there are multiple recipients, the solution uses the first recipient as account/contact of reference, which you can confirm by using *Get Details*.

If you wish to add an e-mail, appointment, or task for synchronization and don't have relevant contact information visible in the side pane, proceed as follows:

Procedure

1. Add an activity **with reference to an account, campaign, sales order, or sales quote** like this:

   a. In Microsoft Outlook, to synchronize an e-mail to SAP Cloud for Customer, open an e-mail and choose ▶ *SAP Cloud for Customer* ❯ *Add E-Mail* ❯.

   > **i Note**
   >
   > When you use *Add E-Mail*, the system adds the e-mail to the object directly, without referencing an account. If you drag and drop the e-mail onto the object, the system also adds the account reference.

   b. Choose *Add Reference* and select the object to which you want to add the e-mail.

   You can also search for another account and add the e-mail with that account as a reference.

   When you add an e-mail with reference to an account, you can filter the search results by type (account or individual customer). Your filter settings persist until you change them.

   An e-mail activity is created automatically in SAP Cloud for Customer under the account that you chose.

2. Add an activity **with reference to an opportunity or lead** like this:

   > **i Note**
   >
   > To add a reference to an opportunity or lead, add a reference to an account first.

   a. In Microsoft Outlook, to synchronize an e-mail to SAP Cloud for Customer, open an e-mail and choose ▶ *SAP Cloud for Customer* ❯ *Add E-Mail* ❯.

   a. Choose ▶ *Add Reference* ❯ *Account* ❯.

   a. Add a reference to an opportunity or lead.

   When you search for the opportunity or lead, the results list displays the opportunities or leads that are associated with the referenced account.

   a. Select the relevant item from the resulting list.

   The e-mail is copied automatically into SAP Cloud for Customer and appears in the opportunity or lead that you selected.

23.3.8.3 See Visits Linked with Tasks

For tasks in SAP Cloud for Customer Add-In for Microsoft Outlook, you can see details about associated visits after the task is synchronized.

Following synchronization, click the *Task Details* link. Details about the associated visits appear. The visit ID is a link that allows you to navigate to the visit directly in SAP Cloud for Customer.

23.3.8.4 Delete Visits, Appointments, or Tasks

When you delete visits, appointments, or tasks, there is no longer a record of them in the SAP solution.

Context

Visits are technically similar to appointments, and the SAP solution handles them in the same way.

> i Note
>
> Unlike deleted visits or appointments, canceled visits or appointments still appear in the SAP solution. As a result, you can use canceled visits or appointments to track visits or appointments that were originally scheduled but not completed.

In the steps listed below, an appointment is used as an example, but the steps are similar for visits, appointments, and tasks.

Procedure

1. In Microsoft Outlook, open the appointment you want to delete.

   > **i Note**
   >
   > You can only synchronize appointments for which you are the organizer. If you are a participant, you receive any updates from the organizer's Microsoft Outlook appointment.

2. Choose ▶ *SAP Cloud for Customer* ❯ *Delete Appointment* ❯.

   You can only delete appointments or tasks that have been synchronized.

Results

For appointments and tasks that were previously synchronized, the deletion is synchronized in both Microsoft Outlook and SAP Cloud for Customer. There is no longer a record of them in the SAP solution.

23.3.9 Manage Phone Calls

Phone calls that you enter and edit in your SAP solution or your Microsoft Outlook calendar are synchronized in both directions. In other words, if you change a phone call in either your SAP solution or the calendar, the change is reflected in both places, following synchronization.

> **i Note**
>
> If you want to **delete or cancel** a phone call, it is not synchronized in both directions. If you cancel the phone call in your SAP solution, it is cancelled in Microsoft Outlook after synchronization. However, if you cancel the phone call in Microsoft Outlook, you must delete it manually in your SAP solution.

23.3.9.1 Add Phone Calls for Synchronization

You can create a phone call in your calendar in Microsoft Outlook and it appears in your SAP solution after synchronization.

Procedure

1. In your Microsoft Outlook calendar, create an appointment.
2. Open the appointment, and under *SAP Sales Cloud*, use the checkbox to indicate that you're creating a phone call.

3. Choose *Add Appointment*.

4. If desired, add a reference.

5. Choose *Submit*.

   In the SAP details that appear near the bottom of the appointment, you can see the synchronization status.

Results

A phone call activity is created in your SAP solution, based on information in the Microsoft Outlook phone call.

23.3.9.2 Synchronize Phone Calls with the Calendar in Microsoft Outlook

If your administrator has made the necessary settings, changes that you make to a phone call in your SAP solution are synchronized to your calendar in Microsoft Outlook.

All of your phone calls are bi-directionally synchronized between Microsoft Outlook and your SAP solution.

> **i Note**
>
> If you want to **delete or cancel** a phone call, it is not synchronized in both directions. If you cancel the phone call in your SAP solution, it is cancelled in Microsoft Outlook after synchronization. However, if you cancel the phone call in Microsoft Outlook, you must delete it manually in your SAP solution.

23.3.9.3 Configure - Synchronize Phone Calls in Microsoft Outlook

As an administrator, you can make settings so that phone calls are synchronized from the SAP solution to users' calendars in Microsoft Outlook.

Log on as an administrator and enable this feature under ╟ *Administrator* 〉 *General Settings* 〉 *Groupware Add-In Settings* 〉 *Microsoft Outlook* 〉 *General Settings* 〉.

23.3.10 For Service Agents

As a service agent, you can use the SAP Cloud for Customer Add-In for Microsoft Outlook to respond to tickets right from your inbox. Make a few quick settings to activate the service-specific features.

23.3.10.1 Set Up Microsoft Outlook Integration for Service

Make a couple service-specific settings to allow you to respond to service tickets using Microsoft Outlook.

Prerequisites

Ensure that you have access to the shared e-mail account in your company used to respond to tickets. Make sure that you use this account when replying to your customers. You may need to select the correct account manually when you compose e-mails.

Procedure

1. In the SAP Cloud for Customer Add-In for Microsoft Outlook toolbar, choose ▶ *Settings* ❯ *Service* ❯.
2. Enable service agent responses to tickets and auto synchronization of tickets.

Related Information

[Set Up SAP Cloud for Customer Add-In for Microsoft Outlook \[page 943\]](#)
[Get Started \[page 947\]](#)

23.3.10.2 Respond to Tickets

If you use the SAP Cloud for Customer Add-In for Microsoft Outlook, you can respond to tickets from the agent workspace using Microsoft Outlook.

Procedure

1. In the agent workspace, ensure that the *Use Microsoft Outlook* checkbox is selected.

2. To respond to the last e-mail, choose *Reply*. This action copies the previous e-mail in the response, and also includes other recipients of the previous e-mail.

   To respond without replying to the last e-mail, choose *Compose New E-Mail*.

   Choosing either response option opens a Microsoft Outlook window prepopulated with the customer's e-mail address.

3. Compose your response.

   > **i Note**
   >
   > Make sure that you are replying from the correct e-mail account.
   >
   > Keep the ticket number in the subject line of the e-mail so that it stays associated with the ticket.

4. Send your response.

Results

The e-mail is associated with the ticket and appears in the interactions.

23.3.10.3 Create New Tickets from E-Mail Inbox

You can create a ticket associated to an e-mail right from your e-mail inbox.

Context

You receive an e-mail from a customer, and you realize it requires action.

If there are any open tickets related to the e-mail, your SAP solution displays them in the side pane. If the e-mail relates to one of the open tickets, just drag and drop the e-mail onto the relevant open ticket.

If the e-mail describes a new issue, open a new ticket right from your inbox:

Procedure

1. Right-click on the e-mail in your inbox and choose *Create Ticket*.
2. In the dialog box that appears, select the relevant account.
3. Choose *Create Ticket*.

Results

The SAP solution creates an e-mail activity and a ticket and associates them to one another. A message that appears in the footer of the e-mail contains a link to open the new ticket for further processing.

23.3.11 SAP Cloud for Customer Add-In for Microsoft Outlook FAQ

Having trouble using SAP Cloud for Customer Add-In for Microsoft Outlook? Check this list of questions and answers for help.

23.3.11.1 Where can I find the MSI installer?

The download page of your SAP solution only contains the EXE installer. Administrators can download the MSI installer from the SAP Software Download Center.

Related Information

23.3.11.2 Why can´t I associate an e-mail with a contact?

The SAP Cloud for Customer Add-In for Microsoft Outlook does not allow you to associate an e-mail, appointment, or task directly to a contact. The association can only be done to account, opportunity, or lead.

When associating an e-mail with an account, the SAP solution tries to determine the contacts that may be related to the e-mail. To do so, it checks the sender or recipients in the e-mail and then looks them up in the SAP solution to see if a contact exists with the e-mail ID. In some cases, it also tries to make a best guess using the name.

If the SAP solution cannot determine a contact, then the e-mail is not associated to the contact, even though this contact is displayed in side pane as a result of the search.

23.3.11.3 Sync is successful, but my contacts or accounts folder is missing.

Problems with the accounts or contacts folders may be caused by both contacts and accounts pointing to the same folder.

Context

The following steps should resolve issues related to the contact and accounts folders:

Procedure

1. Under *Settings*, change the path of the *Accounts* folder to *SAP Cloud for Customer Accounts*.

   If such a folder does not exist, create it manually.

2. If step 1 does not work, try this:

   1. Delete the *SAP Cloud for Customer Contacts* and *SAP Cloud for Customer Accounts* folders. Also remove these folders from the deleted items in Microsoft Outlook.
   2. Close Microsoft Outlook.
   3. Delete the config folders in `%LOCALAPPDATA%\SAP\C4C\config\Groupware`.
   4. Open `%LOCALAPPDATA%\SAP\C4C\config\config.properties`.
   5. In file `%LOCALAPPDATA%\SAP\C4C\config\config.properties`, add the following line as the last line and save it `_ResetRecoveryConfig=TRUE`.
   6. Restart Microsoft Outlook from the run dialog using the following command: `Outlook.exe /resetfolders`.
   7. If this procedure resolves the problem, remove the line that you added.

23.3.11.4 Why is my logon status always "In Progress"?

For some users, if you have enabled automatic logon, the *In Progress* status appears and the logon button is grayed out.

Context

You can resolve this issue with one of the following options:

Procedure

1. Increase AutologonTimer value.
   1. In the registry, navigate to the following key: `HKEY_CURRENT_USER\SOFTWARE\SAP\Business ByDesign FrontEnd\CD\ClientConfig`.
   2. Modify the string value `AutologonTimer`.
      If the value does not exist, create it. The value is maintained in milliseconds. The default value is 20000, which corresponds to 20 seconds.
   3. Increase the timer value to 30000 or in some cases to 60000. Note that this value is applied in all cases, which results in a longer delay when you launch Microsoft Outlook.
2. Disable automatic logon.
   1. In the registry, navigate to the following key: `HKEY_CURRENT_USER\SOFTWARE\SAP\Business ByDesign FrontEnd\CD\ClientConfig`.
   2. Delete all values related to automatic logon:
      - Autologon
      - AutologonTimer
      - CertLogon
      - LoginDetails
      - SSOLogon
   3. Restart Microsoft Outlook.

Related Information

[Log On to SAP Cloud for Customer From Microsoft Outlook [page 948]](#)

23.3.11.5 In a meeting that I've organized, I cannot accept a new time proposal from an attendee.

The accept button is grayed out for the organizer when attendees send new time proposals.

Try one of the following approaches:

- Disable the add-in and see if the issue is resolved.
- Follow the suggestions from Microsoft at https://support.microsoft.com/en-us/kb/3054850 .

23.3.11.6 Why are some of the buttons grayed out?

Sometimes although the add-in loads successfully, the functions are disabled. In this case, the buttons are visible but grayed out.

Context

This problem may be caused by the user downgrading their Microsoft Outlook version, or a corrupt or blank config file. Depending on the suspected cause, use one of the following fixes:

Procedure

1. (Recommended) Run a repair for your Microsoft Office.
2. Modify some of the registry keys related to Microsoft Office.

   Since these registry keys can destabilize the Microsoft Office application if they are not modified correctly, we do not recommend this option. The keys are not related to the SAP add-in but related to Microsoft Office. Nevertheless, the procedure is outlined here.

   In this example, Microsoft Outlook 2013 was installed earlier and the customer downgraded to Microsoft Outlook 2010.

   1. Close any open instances of Microsoft Outlook.
   2. Open the registry editor (Windows `Run command > regedit.exe`).
   3. Navigate to `HKEY_CLASSES_ROOT\Interface\{00063001-0000-0000-C000-000000000046}\TypeLib` or `HKEY_CLASSES_ROOT\Wow6432Node\Interface\{00063001-0000-0000-C000-000000000046}\TypeLib`.
   4. Check the value for *Version*.
      Since the customer has downgraded from Microsoft Office 2013 to Microsoft Office 2010, the value should be 9.4 and not 9.5.

      > i Note
      >
      > Version keys for Microsoft Outlook:

- ○ Microsoft Outlook 2007 : 9.3
- ○ Microsoft Outlook 2010 : 9.4
- ○ Microsoft Outlook 2013 : 9.5
- ○ Microsoft Outlook 2016 : 9.6

5. In the registry editor, navigate to `HKEY_CLASSES_ROOT\TypeLib\{00062FFF-0000-0000-C000-000000000046}`.
6. Retain 9.4 (Microsoft Office 2010) and delete keys for other versions that are not installed on the system.

3. In the case of a blank config file (With whitespaces) you may see the following error in the log:

```
'.', hexadecimal value 0x00, is an invalid character. Line 1, position 1.
```

Stack trace:

```
at
SAP.BYD.Office.Outlook.Core.Configurations.Configuration.Initialize(Configuratio
nStoreType configurationStoreType) at
SAP.BYD.Office.Outlook.Core.Configurations.Configuration..ctor() at
SAP.BYD.Office.Outlook.Core.Configurations.Configuration.GetInstance() at
SAP.BYD.Office.Outlook.Core.Configurations.FolderManager.LoadExistingConfigurati
on() at SAP.BYD.Office.Outlook.Addin.Controller.MainController.Initialize() at
SAP.BYD.Office.Outlook.Addin.AddInManager.<Application_Startup>b__0()
```

In this case, your only options are to delete the corresponding config file or delete the entire config folder. The config folder is under `%LOCALAPPDATA%\SAP\C4C`.

23.3.11.7 In the log, I see message "You do not have sufficient permission to perform this operation".

In some cases, if synchronization fails or information does not appear in the side pane, the add-in responds with the message "You do not have sufficient permission to perform this operation."

Context

You can try one or both of the following fixes:

Procedure

1. Reset the navigation panes.

In some instances, the Microsoft Outlook profile is corrupted and does not recognize the offline folders necessary for the add-in to work properly. When the folders are not recognized, the add-in enters a state where functioning is prevented, resulting in this error. Try this:

1. Close Microsoft Outlook.
2. Use the run command window to open Microsoft Outlook with the command > `Outlook.exe / resetnavpane`.

2. Check whether you are prevented from adding new content to the .PST file.

   The user may be prevented from adding new content (includes folder creation). In such a case, the folders are not created and the add-in can behave incorrectly. Try this:

   1. Open Registry Editor.
   2. Locate and then click the following registry subkey: `HKEY_CURRENT_USER\Software\Policies \Microsoft\Office\<x>.0\Outlook\PST`.

      > **i Note**
      >
      > The <x>.0 placeholder represents the version of Microsoft Outlook: for example, 16.0 is Microsoft Outlook 2016, 15.0 is Microsoft Outlook 2013 and 14.0 is Microsoft Outlook 2010.

   3. Check if the following DWORD exists: `PSTDisableGrow`.
   4. If DWORD `PSTDisableGrow` exists, change the value to "0".
      For more information about this key, see https://support.microsoft.com/en-us/kb/3058474 .

23.3.11.8 Microsoft Outlook has disabled the add-in. How can I enable it again?

Microsoft Outlook imposes strict time limits for add-ins. These time limits include 1000 ms for loading, 500 ms for folder switches and for shutdown. If the add-in exceeds this time limit, then Microsoft Outlook disables the add-in.

Prerequisites

You have administration permissions to modify the registry.

Context

When you reactivate the add-in, if it works without further issues, try the following approaches to resolve the issue.

> ### i Note
>
> Microsoft Outlook Versions
>
> | Microsoft Outlook Name | Version Number |
> | --- | --- |
> | Microsoft Outlook 2010 | 14.0 |
> | Microsoft Outlook 2013 | 15.0 |
> | Microsoft Outlook 2016 | 16.0 |

Procedure

1. Use policy attributes in the registry.

   Policy attributes can also be used by the IT admin as part of their group policy object (GPO).

   1. Close Microsoft Outlook.
   2. Copy this script into Notepad and save the file as `registry_policy_script.reg`.

      > ### i Note
      >
      > The extension should be .reg and not .txt.

      ```
      Windows Registry Editor Version 5.00[HKEY_CURRENT_USER\SOFTWARE\Policies
      \Microsoft\Office\15.0\outlook\resiliency\addinlist]olicies\Microsoft\Office
      \15.0\outlook\resiliency\addinlist]"SAPBusinessByDesignOutlookAddin"=dword:
      00000001
      ```

2. Force Microsoft Outlook to load the add-in by clearing existing resiliency values.

   1. Close Microsoft Outlook.
   2. Copy this script into Notepad and save the file as `registry_policy_script.reg`.

      > ### i Note
      >
      > The extension should be .reg and not .txt.

      ```
      Windows Registry Editor Version 5.00
      [-HKEY_CURRENT_USER\SOFTWARE\Microsoft\Office\Outlook\Addins
      \SAPBusinessByDesignOutlookAddIn]
      [-HKEY_CURRENT_USER\SOFTWARE\Microsoft\Office\15.0\Outlook\Resiliency]
      [HKEY_CURRENT_USER\SOFTWARE\Microsoft\Office\15.0\Outlook\Resiliency
      \DoNotDisableAddinList]
      "SAPBusinessByDesignOutlookAddin"=dword:00000001
      ```

Related Information

[Why are some of the buttons grayed out? \[page 980\]](#)

23.3.11.9 When I create a new appointment, the visit indicator is disabled.

If you have all the necessary roles and access rights assigned to you, but the visit indicator is still disabled, ask your administrator to delete and then re-create your profile in the SAP solution.

The visit indicator is enabled only when:

- User is the organizer for the appointment. This is the case for new appointments.
- The e-mail ID of the organizer matches the mail ID of the Microsoft Outlook profile (default e-mail ID).

The e-mail IDs not matching is the culprit in most cases and it can happen due to many reasons. For example:

- Name change: The e-mail ID had also changed. Though the user could receive e-mails with both old and new e-mail IDs and all synchronization worked, the visit indicator was disabled.
- Multiple e-mail IDs: User chooses a calendar with a different default e-mail ID. This is a complex case and does not happen often with business users.

The add-in tries to resolve the primary e-mail ID of the user and checks the primary e-mail ID against the default e-mail ID. When this check fails, the indicator is disabled.

Ask your administrator to remove and then replace your profile.

Related Information

[Microsoft Support - Remove a Profile](#) ➹
[Microsoft Support - Create New Profile](#) ➹
[Microsoft Support - Profile Actions](#) ➹

23.3.11.10 The side pane does not open. How can I fix it?

Even when the add-in is enabled and users click the *Show Side Pane* button, the side pane does not appear. Causes could include: having multiple inbox windows open, using third-party add-ins with conflicting views, or the Microsoft Outlook profile may be corrupt.

Depending on which case you suspect is causing the problem, try one of the following fixes:

- If you have multiple inboxes open, try to limit yourself to having only one inbox open at a time.
- In the case of third-party add-in interference, try one of the following options:
  - Disable any third party add-ins that are not in use.
  - Open Microsoft Outlook with the following switch from the Microsoft Windows run command: `outlook.exe /cleanviews`.
- If you suspect that the Microsoft Outlook profile is corrupt, delete and re-create your Microsoft Outlook profile.

Related Information

Microsoft Support - Remove a Profile ↗
Microsoft Support - Create New Profile ↗
Microsoft Support - Profile Actions ↗

23.3.11.11 I see the following error in the log: "'.', hexadecimal value 0x00, is an invalid character. Line 1, position 1."

This error is caused by corrupt config files.

Context

To resolve the issue, do the following:

Procedure

1. Close Microsoft Outlook.
2. Delete the config files in `%LOCALAPPDATA%\SAP\C4C`.
3. Restart Microsoft Outlook.

23.3.11.12 Microsoft Outlook does not open, takes too long to open, or I cannot create offline folders.

In the August 2016 release, the add-in was modified to load in the shortest time possible. However there are couple of factors that might still slow down the performance of Microsoft Outlook.

Depending on the symptoms, try one of these fixes:

- Corrupt Microsoft Outlook profile
  If the Microsoft Outlook profile has become corrupt, then the add-in initialization either takes some time or may not happen at all. This error could impact the launch of Microsoft Outlook.
  To resolve this issue, create a new Microsoft Outlook profile.
- Unable to create offline folders

This could happen if Microsoft Outlook is in online mode. You can verify this issue by opening the add-in settings in the following folders and checking if the offline folders are defined. A proper path for all folders indicates a successful creation (if launching add-in for first time):

- o May 2016 version: %`APPDATA%\SAP\CRMOnDemand\Groupware\Settings`
  `\Profile_<profilename>\settings.xml`
  August 2016 version and later: `%LOCALAPPDATA%\SAP\C4C\Config\Groupware\Settings`
  `\Profile_<profilename>\settings.xml`

Related Information

[Microsoft Support - Remove a Profile](#) ↗
[Microsoft Support - Create New Profile](#) ↗
[Microsoft Support - Profile Actions](#) ↗

23.3.11.13 What does a message in the conflict folder mean?

When synchronizing activities from your SAP solution to Microsoft Outlook, the SAP Cloud for Customer Add-In for Microsoft Outlook might raise a message in the conflict folder. This indicates a conflict in the user information between the activity and user profile.

Each activity type affected by this user mismatch has a different consequence.

Activities, Error Causes, and Consequences

Activity Type	Cause	Consequence
E-mail	The from e-mail ID of an activity in the SAP solution does not match the current e-mail ID of the Microsoft Outlook profile.	E-mail is saved in the sent items of Microsoft Outlook with the from value matching the current user's Microsoft Outlook profile (default). Conflict information is logged in the *Conflicts* folder.
Appointment	Organizer's e-mail ID of appointment in the SAP solution does not match the current user's e-mail ID in the Microsoft Outlook profile.	If the appointment end date is within the past 1 month, the appointment is saved. If the appointment end date is more than one month in the past, the appointment is not saved and a conflict is raised.

Activity Type	Cause	Consequence
Task	Owner's e-mail ID of task in the SAP solution does not match the current user e-mail ID of the Microsoft Outlook profile.	Message is saved in the default task folder with the owner matching the current Microsoft Outlook profile user (default). **i Note** If the task due date is more than one month in the past, the task is not created and a conflict message is **not** raised.
Contact and account	During synchronization to the SAP solution from Microsoft Outlook, the e-mail ID of the current user does not match the e-mail ID of the current Microsoft Outlook profile.	Contact is saved if it is subscribed to. Otherwise, the contact is unsubscribed from synchronization. If unsubscription happens, the conflict is still raised though the contact is not saved.
Users created using Service Agent	If a conflict message is raised with a message where the system user e-mail ID is blank, it means that the current user was created using the service agent option.	For Outlook add-in to function properly, create users as proper employees in the system and not via the service agent option. During the initial logon, the add-in retrieves some information from the employee objects and uses it for validation during the synchronization process. If validation fails, a conflict is raised though the process itself does not stop.

23.3.11.14 Why can't I see the add-in in Microsoft Outlook?

You've installed the SAP Cloud for Customer Add-In for Microsoft Outlook, but it doesn't appear when you open your inbox.

Context

Sometimes Microsoft Outlook disables the SAP Cloud for Customer Add-In for Microsoft Outlook, so end users cannot see it. You can fix this issue like this:

Procedure

1. In Microsoft Outlook, go to ▶ *File* ❯ *Options* ❯ *Add-Ins* ◀.

   A list of add-ins appears, sorted by status (active, inactive, disabled).

2. Depending on the status of SAP Cloud for Customer Add-In for Microsoft Outlook, proceed like this:

- Inactive

    1. At the bottom of the page, under *Manage*, choose ▍▶ *COM Add-ins* ❭ *Go* ❭
    2. Enable the add-in.
- Disabled

    1. At the bottom of the page, under *Manage*, choose ▍▶ *Disabled Items* ❭ *Go* ❭
    2. Enable the add-in.

23.3.11.15 Why are all the add-in buttons disabled in Microsoft Outlook?

In rare cases, the SAP Cloud for Customer Add-In for Microsoft Outlook loads properly, but all buttons are disabled.

Context

Downgrading Microsoft Outlook to a previous version, such as downgrading Microsoft Outlook 2016 to the 2013 version, creates an inconsistency that causes this problem.

Someone who is aware of the registry editor and the consequences of incorrect operation, such as your system administrator, can check the cause of the problem like this:

Procedure

1. Open the registry editor.
2. Depending on the Microsoft Outlook and Microsoft Windows version, do one of the following:

    - If the system is running a 32-bit Microsoft Outlook application on a 64-bit Microsoft Windows system, go to registry key `HKEY_CLASSES_ROOT\Wow6432Node\Interface\{00063001-0000-0000-C000-000000000046}\TypeLib`.
    - In all other cases, go to `HKEY_CLASSES_ROOT\Interface\{00063001-0000-0000-C000-000000000046}\TypeLib`.

3. Check that the version corresponds with your version of Microsoft Outlook.
4. Go to `HKEY_CLASSES_ROOT\TypeLib\{00062FFF-0000-0000-C000-000000000046}`. Check the key. Only the key for your version of Microsoft Outlook should be present. A mismatch is the cause of this issue.

    - Microsoft Outlook 2010: 9.4
    - Microsoft Outlook 2013: 9.5
    - Microsoft Outlook 2016: 9.6

Results

If you have found a mismatch, resolve this issue by performing a repair installation of Microsoft Outlook.

23.3.11.16 Why is the "Save and Send E-Mail" button disabled?

When you compose an e-mail, all other buttons work properly, but the *Save and Send E-Mail* button is the only one that is disabled. This happens when the service scenario is enabled.

Context

If your add-in is used by service agents, this behavior is correct. If you only use the feature for sales, simply disable the service scenario like this:

Procedure

1. In Microsoft Outlook, choose *Settings* and go to the *Service* tab.
2. Disable the service scenario and save your changes.

23.3.11.17 Can I sync recurring appointments from Microsoft Outlook?

No, the SAP Cloud for Customer Add-In for Microsoft Outlook does not support synchronization of recurring appointments.

Add-in functions are not displayed when you select a recurring appointment.

Related Information

Add Visits and Appointments for Synchronization [page 961]

23.3.11.18 Are visits handled the same way as appointments?

Yes. In the SAP Cloud for Customer Add-In for Microsoft Outlook, visits are technically similar to appointments, and the SAP solution handles them in the same way.

23.3.11.19 What is the difference between meetings and appointments?

The definitions of meetings and appointments are slightly different, depending on whether you're looking at it from the perspective of Microsoft Outlook or your SAP solution.

Microsoft Outlook considers appointments and meeting requests to be two different entities:

* An appointment is has no attendees.
* A meeting request is an appointment that has attendees.

In SAP Cloud for Customer, appointments are considered appointments, regardless of whether they contain attendees.

23.4 SAP Cloud for Customer, Server-Side Integration for Microsoft Outlook

SAP Cloud for Customer, server-side integration for Microsoft Outlook is a cloud application that performs two-way synchronization of data between your SAP Cloud for Customer account and mailbox server. In addition, it provides access to SAP Cloud for Customer data right from your e-mail inbox.

Scope and Configure SAP Cloud for Customer, Server-Side Integration for Microsoft Outlook [page 991]
As an administrator, you must define and set up the server-side integration for Microsoft Outlook.

Get Started [page 1033]
The SAP Cloud for Customer, server-side integration for Microsoft Outlook allows you to exchange information between Microsoft Outlook and SAP Cloud for Customer.

Manage E-Mails [page 1036]
If you use the SAP Cloud for Customer, server-side integration for Microsoft Outlook, you can do a lot right from your inbox. For example, you can add e-mails to your SAP solution or add e-mails with reference to other objects.

Manage Contacts [page 1039]
If you use SAP Cloud for Customer, server-side integration for Microsoft Outlook, you can create contacts, associate them with other objects in your SAP system, pin them, and even add contacts from your SAP solution into Microsoft Outlook.

Manage Appointments and Visits [page 1042]
If you use SAP Cloud for Customer, server-side integration for Microsoft Outlook, you can synchronize appointments and visits so that updates in your SAP solution appear in Microsoft Outlook, and the other way around.

If you use the SAP Cloud for Customer, server-side integration for Microsoft Outlook, you can add, share, and open tasks.

Having trouble using this add-in? Check this list of questions and answers for help.

23.4.1 Scope and Configure SAP Cloud for Customer, Server-Side Integration for Microsoft Outlook

As an administrator, you must define and set up the server-side integration for Microsoft Outlook.

SAP Cloud for Customer, server-side integration for Microsoft Outlook is a service that performs two-way synchronization of data between SAP Cloud for Customer and the Microsoft Exchange mailbox. It allows users to interact with SAP Cloud for Customer directly from an e-mail application. This interaction can happen in the following ways:

- By placing contacts, appointments, visits, tasks, or e-mails into special folders or by assigning these items to the SAP category in Microsoft Outlook.
- By providing Microsoft Outlook users (on Microsoft Windows, OS X, Web-based, or mobile) with the add-in that can interact with SAP Cloud for Customer.

Administrators must set up this integration for users by provisioning users, managing provisioned users, creating organizations and assigning users to them, and creating and managing profiles with configuration settings.

Only SAP Cloud for Customer administrators can access the groupware settings. Ordinary users (SAP Cloud for Customer tenants without administrative rights) do not have access to the groupware settings. Therefore, before proceeding to the groupware settings, make sure that you have an appropriate user in SAP Cloud for Customer that has administration permissions.

More and more business happens when people are away from their desks, out in the field. Administrators can make a few settings to enable their company to work right from mobile devices.

A profile is a collection of configuration settings and parameters. When administrators provision users, a profile is assigned to each user. To be provisioned, users must be assigned to a profile.

To make user management easier, administrators can divide users into groups called organizations. An organization can be configured to provide its users with specific common configuration.

As an administrator, you must create users in SAP Cloud for Customer and provision them to SAP Cloud for Customer, server-side integration for groupware. At that point, users can access and use SAP Cloud for Customer, server-side integration for groupware.

As an administrator, after you provision users to SAP Cloud for Customer, server-side integration for groupware, you can manage various user-related settings like disabling synchronization for users or assigning them to another organization. You can also delete provisioned users, transitioning them back

to an unprovisioned state and preventing them from using SAP Cloud for Customer, server-side integration for groupware.

User Settings [page 1020]
  Once your administrator has provisioned you and you have received the email confirmation, you can start with the following steps.

Manage Installation of SAP Cloud for Customer, server-side integration for Microsoft Outlook [page 1023]
  As an administrator, you may want to mass-deploy the add-in, check installation status for a user, or install the add-in manually.

Customize SAP Cloud for Customer, Server-Side Integration for Groupware [page 1025]
  As an administrator, you can customize the default appearance and behavior of the SAP Cloud for Customer, server-side integration for groupware.

Switch from SAP Cloud for Customer Add-In for Microsoft Outlook to SAP Cloud for Customer, Server-Side Integration for Microsoft Outlook [page 1028]
  In addition to uninstalling SAP Cloud for Customer Add-In for Microsoft Outlook, there are a few steps you should take to preserve any SAP data that is in your Microsoft Outlook e-mail client.

Main Concepts [page 1029]
  A list of the main concepts the administrator should be familiar with when managing SAP Cloud for Customer, server-side integration for groupware for Microsoft Outlook or Gmail.

Stages of Migration to OData V2 [page 1031]
  SAP plans to encourage and then enforce users to switch to Open Data Protocol, version 2 (OData V2).

Configure: Switch to OData V2 [page 1032]
  Administrators must switch all profiles in their organizations to Open Data Protocol, version 2 (OData V2).

23.4.1.1 Access the Groupware Settings

Only SAP Cloud for Customer administrators can access the groupware settings. Ordinary users (SAP Cloud for Customer tenants without administrative rights) do not have access to the groupware settings. Therefore, before proceeding to the groupware settings, make sure that you have an appropriate user in SAP Cloud for Customer that has administration permissions.

To access the groupware settings, in SAP Cloud for Customer, go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯.

When you access the *Groupware Settings* tab for the first time as an administrator, you are automatically provisioned to the SAP Cloud for Customer, server-side integration for groupware. Specifically, this means that you are automatically:

- Added to the default organization
- Assigned a default profile
- Provided with the access to the *E-Mail Integration* tab, where you can configure SAP Cloud for Customer, server-side integration for groupware from an end-user perspective using the dashboard. For more information, see the reference in the related information section.

When you are provisioned by the system, you also receive a notification e-mail in your inbox. The solution uses the e-mail address that was configured in SAP Cloud for Customer.

After you are provisioned, you can perform other administrative tasks, such as provisioning other users, creating new organizations or profiles, or configuring settings for SAP Cloud for Customer, server-side integration for groupware.

Related Information

23.4.1.1.1 How SAP Cloud for Customer, Server-Side Integration for Groupware Reacts When a User Role Changes

Since the SAP solution allows the user roles to be changed, an administrator can become an ordinary user or vice versa.

When such a change in roles occurs, SAP Cloud for Customer, server-side integration for groupware adapts to the situation – when a user logs on to SAP Cloud for Customer, server-side integration for groupware, the user permissions are automatically adjusted based on the new user's role in the SAP solution.

Note that no notification appears in this case.

23.4.1.2 Enable Add-In for Mobile

More and more business happens when people are away from their desks, out in the field. Administrators can make a few settings to enable their company to work right from mobile devices.

23.4.1.2.1 Enable Add-In for Mobile

As an administrator, you can enable SAP Cloud for Customer, server-side integration for Microsoft Outlook to work in the Microsoft Outlook mobile app.

Log on as an administrator to SAP Cloud for Customer and go to ▸ *E-Mail Integration* ▸ *Groupware Settings* ▸ *Users* ▸. In the row of the user you want to enable, in the *Actions* column, choose *Install SAP, server-side integration for Microsoft Outlook*. Reinstalling the add-in enables the add-in to work on supported mobile platforms and reactivates the users that you selected.

23.4.1.3 Manage Profiles

A profile is a collection of configuration settings and parameters. When administrators provision users, a profile is assigned to each user. To be provisioned, users must be assigned to a profile.

A profile specifies the following:

- Filtering rules for objects and records
- Restrictions for business actions
- Custom read-only fields to be displayed for the records of various types (smart descriptions)
- Customization of the Microsoft Outlook add-in or Gmail add-in
- Configuration of reminders
- Rules for sharing e-mail messages

To see a list of available profiles, log on to the HTLML5 client as an administrator and choose ▶ *E-Mail Integration* ▶ *Groupware Settings* ▶ *Profiles* ▶.

> **i Note**
>
> Server-side integration uses OData V2 APIs for synchronization. For add-in, server-side integration uses OData V1 APIs.

23.4.1.3.1 Types of Profiles

Administrators can create profiles, which are collections of configuration settings and parameters. During provisioning, administrators must assign users to profiles.

Profile Types

Profile	Description
Default profile template	After provisioning, users are automatically assigned a default profile template. This profile contains the default configuration for SAP Cloud for Customer, server-side integration for groupware. The default profile template is provided by the Professional Services team and cannot be edited by an administrator or an ordinary user. However, the default profile template can be used for creating other profile templates.
Profile template	Profile that can be created and edited by administrators. The profile template can either be created from a default profile template or from scratch, and it can be assigned to either ordinary users or administrators. Ordinary users cannot edit profile templates, but they can switch between available profiles using the dashboard in SAP Cloud for Customer, server-side integration for groupware. A profile template can also be specified instead of the default profile when administrators create new organizations.

Profile	Description
Customized profile	If an ordinary user changes the settings that are defined by the selected profile template (for example, changes the synchronization settings on the dashboard), this profile template becomes a customized profile. The customized profile is only effective for the user who created it, but such a profile can be saved as a profile template by an administrator. When converted to a profile template, it can be shared among other users.

23.4.1.3.2 Configure: Create a New Profile Template

Administrators can create new profile templates from either a default profile or from another profile template. Profile templates cannot be created from scratch.

Context

To see a list of available profiles, log on to the HTLML5 client as an administrator and choose ▎▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Profiles* ▎.

To create a new profile template, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator and go to ▎▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Profiles* ▎.
2. Find the profile that you want to base your new profile on. You can use both the default profile template and user-created profile templates.

   To identify a default profile, look in the *Actions* column for a profile for which the trash icon is disabled (since the default profile cannot be deleted).
3. In the *Actions* column, click the copy icon.
4. On the screen that appears, enter the appropriate information.
5. Save your changes.

23.4.1.3.3 Configure Strict Search

Administrators can configure the search so that it only returns exact matches.

By default, the add-in adds wildcards (*) automatically before and after search terms that users enter. If you do not want the wildcards to be added automatically, use the strict search, which only returns exact matches.

> **i Note**
>
> Users may still add wildcards (*) manually.

Log on to the HTLML5 client as an administrator and go to ▌▶ *E-Mail Integration* ❯ *Groupware Settings* ▐ and make the setting to use the strict search. The setting applies to all users and all searches.

23.4.1.3.4 Configure Synchronization Filters

SAP Cloud for Customer, server-side integration for groupware uses synchronization filters to determine which records to synchronize between the user's mailbox and SAP Cloud for Customer. Administrators can configure different filters for each record type.

Context

When you configure the profile's synchronization filters, for each record type, you can choose from the following options:

- *My Records*
  Synchronizes records where the user is an owner. For contacts – synchronize records where the user is an owner of the associated account.
- *My Team's Records*
  Only applicable for contacts and accounts. For contacts – synchronizes records where the user or the members of the user's team are the owners of the associated account; for accounts – synchronizes records where the user or the members of the user's team are owners.
- *Favourite Contacts*
  Only synchronize the contacts marked as favourite.
- *Do Not Synchronize*

To configure synchronization filters, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator and go to ▌▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Profiles* ▐ and open the profile that you want to edit.

2. On the *Sync Settings* tab, go to the card for the type or record you want to edit.

3. Under *Settings*, select the synchronization filter that you need.

4. Save your entries.

23.4.1.3.5 Maximum Number of Synchronized Records

For better performance, the total number of records that SAP Cloud for Customer, server-side integration for groupware can synchronize is limited to 9,000. This limit is predefined and cannot be changed, even by an administrator.

SAP Cloud for Customer, server-side integration for groupware plans have a limit on the maximum number of synchronized records. Once the limit is reached, SAP Cloud for Customer, server-side integration for groupware may limit the number of records retrieved from SAP to your Microsoft Exchange.

> ⁂ Example
>
> Suppose you have 15,000 contacts in SAP, and your plan allows for a maximum of 9,000 records. If you synchronize only the contacts, then only 9,000 of those 15,000 will be synchronized between your SAP solution and Microsoft Exchange. SAP Cloud for Customer, server-side integration for groupware will retrieve the newest 9,000 contacts based on the contact creation date.

> i Note
>
> The number of e-mail messages that users can synchronize with SAP Cloud for Customer is unlimited.

The limit of 9,000 records is distributed across account , contact, individual customers and tasks. So if you want to increase the limit for one record type, you must reduce the limit for the other record type so that the total does not exceed 9,000.

> i Note
>
> SAP Cloud for Customer, server-side integration for groupware synchronizes the newest records first. When a number of records exceeds the specified limit, older records beyond this limit are skipped.

23.4.1.3.6 Configure Restrictions

Administrators can restrict ordinary users from performing certain actions. These restrictions can be set for individual record types and can apply to both the SAP Cloud for Customer, server-side integration for groupware and synchronization settings.

Context

> **i Note**
>
> An ordinary user is not allowed to change restrictions even in the context of a customized profile.

To set restrictions, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▷ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Profiles* ◁, and open the profile that you want to edit.
2. On the *Sync Settings* tab, go to the card for the type or record you want to edit.
3. Under *Settings*, set the restrictions that you need.
   For more information about each restriction, choose the information ("i") button near the restriction.

   > **i Note**
   >
   > Setting Restrictions for Individual Customers
   >
   > By default, individual customers are not synchronized with the user's mailbox. However, it is possible to enable synchronization for the records of this type by using the *Synchronize Individual Customers* restriction. If you select this restriction, users can share individual customers via the *Individual Customers* folder that is added to the user's mailbox.

   > **i Note**
   >
   > Setting Restrictions for Attachments
   >
   > For attachments, you can specify the file name extensions that you want to allow or block. To do so, under ▷ *Sync Settings* ❯ *General Sync Settings* ◁, in the *Allowed File Extensions for Attachments* or *Prohibited File Extensions for Attachments* box, either select the extensions from a list or type a list of such extensions separated by commas or spaces. Note that, when you add extensions, the leading dot is optional. In other words, both .docx and docx are allowed.

23.4.1.3.7 Configure Smart Descriptions

Administrators can edit smart descriptions, which allow fields that are not mapped to native mail server fields to be displayed for the user.

Context

Depending on the type of a record, these fields are represented differently:

- For contacts, individual customers, and accounts, the values of the specified fields appear in the notes section.
- For tasks, field values appear in the body of the task.

> **i Note**
>
> A set of SAP Cloud for Customer fields that are available for selection is defined by the user's metainfo. Service fields are omitted.

To specify the fields that are to be shown as smart descriptions, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▌ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Profiles* ❯ , and open the profile that you want to edit.
2. On the *Sync Settings* tab, go to the card for the type or record you want to edit.
3. Under *Smart Description*, choose *Add Smart Description Field*.
4. Select a field that you want to display from the list.

   You can add as many fields as you need by repeating the last two steps.

Results

If, for some reason, the content of the fields specified as smart descriptions cannot be displayed, these fields are omitted. For example, if the user does not have permission to view the content, the field does not appear.

23.4.1.3.8 Configure Mass Rollout of Profile Changes

Administrators can apply profile updates to all users quickly and at the same time.

Context

As an administrator, when you change a profile that is the default profile for an organization, you can apply the profile changes to all users in that organization.

Procedure

1. Log on to your SAP solution as an administrator and make the profile changes in the default profile for an organization.
2. Go to ▌▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Organizations* ▐.
3. Select the organization and the updated profile and choose ▌▶ *Settings (⚙)* ❯ *Save and Apply Profile for All Users* ▐.

Results

The profile changes that you made are reflected for all users of the organization that you selected.

23.4.1.3.9 Configure: Auto Sync Recurring Events

To allow automatic synchronization of recurring events from MS Outlook to SAP Cloud for Customer, follow these steps:

1. Navigate to ▌▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Profiles* ▐ and select your profile.
2. Open the tab *SYNC SETTINGS* and under *Calendar Sync Options*, click the checkbox *Include recurring events*.

23.4.1.3.10 Configure Recurring Events

To manage recurring events, follow these steps

1. Navigate to ▌▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Profiles* ▐ and select your profile.

2. Open the tab *ADD-IN SETTINGS* and under *RECURRING ACTIVITY* card, use the following options:
   ○ *Detailed View*: You can select the fields to be displayed in groupware for the detailed view of recurring appointments and visits.
   ○ *Basic View*: You can select the fields to be displayed in groupware for the basic view of recurring appointments and visits.
   ○ *Settings*: You can select sort method, days in past to display, and filter status (e.g. open, canceled etc.).

23.4.1.4 Manage Organizations

To make user management easier, administrators can divide users into groups called organizations. An organization can be configured to provide its users with specific common configuration.

When a new user is provisioned, administrators must assign the new user to an organization, either default or newly created; otherwise, the user cannot be provisioned. Unprovisioned users are not assigned to any organization.

Users in the same organization share common, organization-specific synchronization settings. By adding users to or removing them from the organization, an administrator can manage which configurations are used by which users.

When a new SAP Cloud for Customer tenant is provisioned to SAP Cloud for Customer, server-side integration for groupware, a new default organization is created. This default organization cannot be deleted; however, administrators can edit its name and settings.

A new or default organization is also assigned a template profile (a collection of specific configuration settings and parameters), which administrators can change later. This template profile is automatically applied to all users in the organization.

At the level of organization, you can define the following settings for its users:

- Type of the mailbox access
- Synchronization status (enabled or disabled)
- Profile with the specific configuration for SAP Cloud for Customer, server-side integration for groupware

You can view a list of organizations by logging on to the HTLML5 client as an administrator and choosing ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Organizations* ◀.

You can show or hide columns in the list by using the ☰ *hamburger icon*.

Related Information

23.4.1.4.1 Configure How Users in an Organization Access Their Mailboxes

At the organization level, administrators can control how users access their mailboxes.

Context

When a new organization is created, specify the type of mailbox access to be used for the organization's users. When the access type is selected and configured, it is applied to all users in the organization. Users can only use the defined access type to access their mailboxes.

Possible options are as follows:

- *Microsoft Exchange Direct Logon*
  If the users in the organization access their Microsoft Exchange mailboxes directly, specify the direct logon access type for the organization.
- *Microsoft Exchange Impersonation*
  Microsoft Exchange Impersonation is used in scenarios in which a single account must access many accounts. Before setting up an Exchange Impersonation access type, the Microsoft Exchange administrator must configure the impersonation as follows:
  1. Create a service account.
  2. Create a group for scoping purpose to allow only impersonation on mailboxes for CRM users.
  3. Assign impersonation rights to a new exchange admin role that is scoped to the above group.
  4. The service account must be excepted for MFA/Conditional Access to connect to the Exchange Web Service (EWS).

  > **i Note**
  >
  > List of IP addresses used by server-side integration is available from SAP support and can be provided to limit access from only IPs used by server-side integration.

  Microsoft Exchange administrator must provide an SAP Cloud for Customer administrator with both the Microsoft Exchange service account details and a list of users whose accounts are impersonated.
- *Office 365 OAuth*
  If Office 365 is used, then server-side integration already supports per-user MFA. This mode requires each provisioned user to grant access to mailboxes via Server-side integration.
  This mode supports all MFA configuration.
  Passwords aren't stored by Server-side integration. Only OAuth2 refresh tokens that are scoped to Server-side integration can be revoked by O365 admin.
  Tokens normally don't expire with password change, and this policy is fully configured in Azure AD of customer Office 365 tenant.
- *Google Direct Logon*
  If the users in the organization access their Gmail inboxes directly, specify the direct logon access type for the organization.

As an administrator, you can change the mailbox access type at any time. To change the mailbox access type for the organization, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▌▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Organizations* ◣, and open an organization.
2. On the *E-Mail Configuration* tab, select the required mailbox access type.

   Configure the access type by entering appropriate information in the fields that appear.

   If you select Microsoft Exchange Impersonation, note the following:
   - The account logon and password are the e-mail address and password of the impersonating user.
   - In the *Exchange Web Services (EWS) URL* field, specify the Exchange Web Services endpoint URL. To trigger SAP Cloud for Customer, server-side integration for groupware to find the required EWS endpoint URL automatically, click the magic wand icon (⚟).

   You can verify whether the impersonating account specified for the organization can access accounts of the users added to this organization. To do so, on the *Organizations* tab, under *Actions*, choose the key icon (⚟).
3. Save your changes.

Results

> ⚠ Caution
>
> If the change of the mailbox access type isn't accompanied by corresponding changes in the organization users' settings, it can affect the ability of those users to access their mailboxes.

23.4.1.4.2 Configure: Create a New Organization

Organizations allow administrators to streamline user setup.

Context

To create a new organization, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▐▶ *E-Mail Integration* ❭ *Groupware Settings* ❭ *Organizations* ❭, and click *New*.
2. Enter the appropriate information in the fields that appear.
   - Profile
     Specify the profile that is assigned to the users in the organization by default.
   - Mailbox access type
     Select how the users in the organization access their mailboxes and then specify the required parameters.
3. Save your entries.

Results

You can add provisioned users to this organization.

Related Information

Manage Profiles [page 994]
Configure How Users in an Organization Access Their Mailboxes [page 1002]
Configure: Assign Profiles to Organizations [page 1004]

23.4.1.4.3 Configure: Assign Profiles to Organizations

All organizations must be associated with a profile template. The profile template is assigned automatically to all users in this organization. As an administrator, when you create a new organization, you must specify the profile template that the system uses by default.

Context

Administrators can change the default profile template to any other profile after the organization is created; however, if that profile gets deleted or renamed, the organization reverts automatically to the profile that was specified as default.

To assign the organization a new profile, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▷ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Organizations* ❯, open the organization for which you want to assign a new profile.
2. Select the new profile.
3. Save your changes.

23.4.1.4.4 View Organization Statistics

Administrators can view statistics about the last synchronization session for each user in the organization.

Context

To view user statistics, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▷ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Organizations* ❯, open the organization for which you want to view statistics.
2. To see a list of user statistics, go to the *Statistics* tab .
3. To see more details, under *Actions*, choose the icon to open the job.
4. To download a session-related log, under *Actions*, choose the icon to download the log.

   You can show or hide columns in the list by using the ≡ icon.

23.4.1.4.5 View Organization Related Activity History

Administrators can view activities related to the current organization.

Context

Activities related to the current organization can be of the following types:

- The organization was added
- Synchronization was enabled
- Synchronization was disabled

For each activity, you can see the following information:

- Date and time when the activity occurred
- E-mail address of the user that initiated the activity
- Activity type

To view a list of activities, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▷ *E-Mail Integration* 〉 *Groupware Settings* 〉 *Organizations* 〉, and open the organization for which you want to view activities.
2. Go to the *Activities* tab.
3. To download a session-related log, under *Actions*, choose the icon to download the log.

23.4.1.4.6 Configure: Delete an Organization

Administrators can delete an organization only if all users in this organization are reset. Once the organization is deleted, all users in the organizations are deleted too.

Context

> **i** Note
>
> The default organization cannot be deleted.

To delete an organization, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▷ *E-Mail Integration* 〉 *Groupware Settings* 〉 *Organizations* 〉, and open the organization that you want to delete.
2. Ensure that the synchronization is disabled for all users in the organization.
3. Choose ▷ *Settings* 〉 *Delete* 〉.

> **i Note**
>
> If a user in the organization cannot be reset (for example, SAP Cloud for Customer, server-side integration for groupware can no longer access the user's mailbox), but you still must delete the organization, you can force deletion of the user without resetting it. Note that any changes that were made by SAP Cloud for Customer, server-side integration for groupware to the user's mailbox (such as adding extra folders) are not removed.
>
> To force the deletion of an organization that contains users that could not be reset, on the *Organizations* tab, open the organization that you want to force-delete and choose ▶ *Settings* ❯ *Force Delete* ❯

23.4.1.5 Provision Users

As an administrator, you must create users in SAP Cloud for Customer and provision them to SAP Cloud for Customer, server-side integration for groupware. At that point, users can access and use SAP Cloud for Customer, server-side integration for groupware.

23.4.1.5.1 Configure: Provision Users

Provisioning is the process for administrators to create and activate users, and manage user access to SAP Cloud for Customer, server-side integration for groupware. Provisioning also starts the synchronization between the e-mail inbox and the SAP solution for provisioned users.

Context

> **i Note**
>
> You must have active profiles and active organizations in the system before you start profiling users.

> **→ Recommendation**
>
> Using the same e-mail address across different tenants and for both testing and productive use may cause problems.
>
> We recommend using different e-mail addresses for:
>
> - Testing
> - Productive use
> - Each tenant

Provisioning of users can only be performed by an administrator in SAP Cloud for Customer, server-side integration for groupware, who belongs to an SAP Cloud for Customer tenant and has administrative rights. Administrators are provisioned automatically the first time they access the *Groupware Settings* tab.

To see a list of users that can be provisioned, log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* 〉 *Groupware Settings* 〉 *Provisioning* ▶.

You can show or hide columns in the list by using the ≡ icon.

To provision a user, do the following:

Procedure

1. Choose ▶ *E-Mail Integration* 〉 *Groupware Settings* 〉 *Provisioning* ▶.
2. Click the plus sign at the far right for the user you want to provision.

   You can filter users by business role and provision the entire list at the same time.

   You can also provision several users at once by selecting them with the check mark to the left of their names and choosing *Activate Selected*.
3. On the next screen, the default organization is selected. Check and change it as necessary.
4. Specify the profile that is assigned to all users in the organization by default.
5. (Optional) Select the checkbox to send a welcome e-mail to the user.

   An e-mail with instructions on how to proceed with SAP Cloud for Customer, server-side integration for Microsoft Outlook or SAP Cloud for Customer, server-side integration for Gmail is sent to the user following provisioning.
6. Click *Provision*.

Results

When an administrator provisions another user, the following happens:

- This user is added to the organization, either default or specified.
- This user is assigned the template profile, either default or specified.
- Optionally, a welcome e-mail is sent to the user with instructions on how to complete registration in SAP Cloud for Customer, server-side integration for groupware.

> i Note
>
> If an administrator provisions a user without this user receiving a welcome e-mail, then the provisioned user is not informed of this action and does receive instructions on how to proceed with or configure SAP Cloud for Customer, server-side integration for groupware.

The SAP Cloud for Customer, server-side integration for Microsoft Outlook or SAP Cloud for Customer, server-side integration for Gmail is installed automatically for provisioned users after they successfully sign in to the appropriate mail server (Microsoft Exchange or Gmail).

If the following requirements are met, no further actions are required for provisioned users:

- The organization that the user is assigned to uses the mailbox access type *Microsoft Exchange Impersonation*.

- The user's SAP Cloud for Customer e-mail address is the same as the user's address in the exchange server.
- The user's e-mail address is added to the list of addresses of users who are impersonated.

Otherwise, a provisioned user must either follow instructions in the welcome e-mail, or an administrator must manually configure SAP Cloud for Customer, server-side integration for groupware for that user.

Related Information

Access the Groupware Settings [page 992]
Manage Provisioned Users [page 1011]

23.4.1.5.2 Configure Mass Deployment of SAP Cloud for Customer, server-side integration for Microsoft Outlook

As with any other add-in for Microsoft Outlook, administrators can mass-deploy the SAP Cloud for Customer, server-side integration for Microsoft Outlook to provisioned users.

Context

For mass deployment, you need the add-in manifest. To download the manifest, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❭ *Groupware Settings* ❭ *Settings* ◀, and click *Show Manifest*.
2. Copy this manifest to a file.

Results

After you have downloaded the manifest, for information on how to mass-deploy add-ins, see the documentation for Microsoft Exchange Server and Microsoft Outlook.

23.4.1.5.3 Configure: Resend Welcome E-Mail

Administrators can trigger SAP Cloud for Customer, server-side integration for groupware to resend a welcome e-mail to users.

Context

To resend a welcome e-mail, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Users* ❯, and select one or more users for whom you want to resend the welcome e-mail.
2. Choose ▶ *Settings* ❯ *Send Welcome E-Mail* ❯.

23.4.1.5.4 Configure: Delete (Unprovision) Users

As an administrator, when you delete a user, it means that this user can no longer use SAP Cloud for Customer, server-side integration for groupware and synchronize data. In other words, a deleted user becomes an unprovisioned user. Such users appear on the *Provisioning* tab, and, if required, can be provisioned again.

Context

> ⚠ Caution
>
> If an SAP Cloud for Customer user is deactivated or deleted, the corresponding SAP Cloud for Customer, server-side integration for groupware user still remains active and billable. For such user to be completely unprovisioned and deleted from SAP Cloud for Customer, server-side integration for groupware, he or she must be explicitly deleted by an administrator.

To delete a user, do the following:

Procedure

1. Reset the user's mailbox.

> **i Note**
>
> If for some reason, a user cannot be reset (for example, SAP Cloud for Customer, server-side integration for groupware can no longer access the user's mailbox), but you still must delete the user, you can force the deletion of the user without resetting it. Note that any changes that were made by SAP Cloud for Customer, server-side integration for groupware to the user's mailbox (such as adding additional folders) are not removed.
>
> To force the deletion of a user, log on to the HTLML5 client as an administrator, go to ▐▶ *E-Mail Integration* ❭ *Groupware Settings* ❭ *Users* ❭, open the user that you want to force-delete and choose ▐▶ *Settings* ❭ *Force Delete* ❭.

2. Log on as an administrator to SAP Cloud for Customer HTML client, go to ▐▶ *E-Mail Integration* ❭ *Groupware Settings* ❭ *Users* ❭, and do one of the following:

   ○ On the *Users* tab, under *Actions*, choose the appropriate icon.

   ○ On the *Users* tab, open the user that you want to delete and choose ▐▶ *Settings* ❭ *Delete* ❭.

Related Information

[Configure: Reset Mailboxes and Disable Synchronization [page 1015]](#)

23.4.1.6 Manage Provisioned Users

As an administrator, after you provision users to SAP Cloud for Customer, server-side integration for groupware, you can manage various user-related settings like disabling synchronization for users or assigning them to another organization. You can also delete provisioned users, transitioning them back to an unprovisioned state and preventing them from using SAP Cloud for Customer, server-side integration for groupware.

You can show or hide columns in the list by using the ☰ icon.

> **i Note**
>
> On the *Users* tab, users for whom the mailbox is initialized appear in bold font.

Related Information

[Configure: Reinitialize Mailboxes [page 1014]](#)

23.4.1.6.1 Configure the Synchronization Status of Users

Administrators can enable or suspend synchronization for individual users.

By default, synchronization is disabled for a newly provisioned user until that user completes an initial configuration for SAP Cloud for Customer, server-side integration for groupware, using the welcome wizard. In the list on the *Users* tab, the users for which synchronization is enabled are shown in black, while the users for which it is suspended are shown in red.

> i Note
>
> Synchronization may also be disabled automatically due to errors.

To change synchronization for a user, on the *Users* tab, under *Actions*, choose the synchronization icon.

You can change the synchronization status for several users at the same time by selecting them, choosing *Settings*, and clicking *Enable Synchronization* or *Disable Synchronization*.

There can be differences between the organization's synchronization status and an individual user's synchronization status. SAP Cloud for Customer, server-side integration for groupware compares these statuses when determining the effective status. The organization's status always overrides the individual user's status except when synchronization is disabled for the user that belongs to the organization for which the synchronization is enabled – in this situation, the user's status overrides the organization's status.

23.4.1.6.2 Configure: Force Synchronization

By default, SAP Cloud for Customer, server-side integration for groupware automatically synchronizes data every 30 minutes, but administrators can synchronize manually at any time. You cannot force synchronization more than once per minute.

Context

To force synchronization for a user, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, and go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Users* ❯.
2. Under *Actions*, choose the appropriate icon.

   You can force synchronization for several users at the same time by selecting them, choosing *Settings*, and clicking *Force Sync*.

23.4.1.6.3 Configure Which Visits to Synchronize

In SAP Cloud for Customer, when associated with visits, users can be either visit organizers or visit owners. As an administrator, you must configure which visits are synchronized for users.

Context

You can define which visits must be synchronized for the user – where the user is an owner or organizer – as follows:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Settings* ◀.
2. In the *Sync Visit To* field, select whether you want to sync visits to the owner or the organizer.

23.4.1.6.4 Configure: Assign Other Profiles for Users

During the provisioning process, as the administrator, you assign users to a template profile (either specified or default for the organization). After provisioning, you can change the profile that is assigned to the user.

Context

To change the template profile assigned to a user, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Users* ◀, and open the user for whom you want to change a profile.
2. In the *Profile* field, select the profile that you want for this user.

   To go to the selected profile, click *Navigate*. You can also customize the selected profile by clicking *Customize*.
3. Save your entries.

Manage Profiles [page 994]

23.4.1.6.5 Configure: Assign Users to Other Organizations

As an administrator, you can specify the organization each user is assigned to during the provisioning process. Otherwise, users are automatically assigned to the default organization. After provisioning, you can change the organization to which users are assigned.

Context

> **i Note**
>
> When assigning users to other organizations, be aware that the new organization may use different mailbox access types or Microsoft Exchange Server impersonation settings. As a result, it may affect the ability of SAP Cloud for Customer, server-side integration for groupware to access the user's mailbox.

To assign a user to another organization, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▎ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Users* ▎ , and open the user for whom you want to change an organization.
2. In the *Organization* field, select the organization that you want for this user.

   To go to the selected profile, click *Navigate*.
3. Save your entries.

23.4.1.6.6 Configure: Reinitialize Mailboxes

When an initial synchronization is started, SAP Cloud for Customer, server-side integration for groupware performs the initialization of the user's mailbox. It adds new folders and categories. However, if an error occurs that may affect the integrity of synchronized data, administrators may need to reinitialize the user's mailbox.

Context

> ⚠ Caution
>
> When reinitializing a user's mailbox, all previously synchronized data is removed from the mailbox. Therefore, make sure that the user has backed up his or her data before performing this operation.

To reinitialize a user's mailbox, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▌▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Users* ❯, and open the user whose mailbox you want to re-initialize.
2. Choose ▌▶ *Settings* ❯ *Re-Initialize User's Mailbox* ❯.

Results

The mailbox will be re-initialized during the next synchronization session.

23.4.1.6.7 Configure: Reset Mailboxes and Disable Synchronization

Administrators can reset a user's mailbox and disable synchronization for that user. For example, this operation is required when preparing an organization for deletion, since the organization cannot be removed until all of its users are reset in this manner.

Context

To reset a user's mailbox, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▌▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Users* ❯, and open the user whose mailbox you want to reset.
2. Choose ▌▶ *Settings* ❯ *Reset Mailbox* ❯.

> **i** Note
>
> If synchronization is re-enabled for the user, the user's mailbox is automatically initialized during the next synchronization session.

23.4.1.6.8 Configure User Name and Mailbox Access Settings

As an administrator, you can edit the user name and mailbox settings that were specified during the provisioning process or defined by the organization to which the user belongs.

Context

You can either change the user's general settings or the mailbox access settings.

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Users* ❯ , and open the user whose settings you want to change.
2. To change the general settings, edit the necessary information and save your changes.
3. On the *E-Mail Configuration* tab, change the mailbox access settings as follows:
   - If the *Microsoft Exchange Direct Logon* access type is used, you can modify any of the fields that appear.
     For Microsoft Office 365: If the user uses the OAUTH2 authentication, you can switch back to the basic authentication method (access via the logon and password) and delete the refresh token (click *Invalidate Password*).
   - If the *Microsoft Exchange Impersonation* access type is used, you can modify the e-mail address only.

23.4.1.6.9 Check Mail Server Connection Status

For troubleshooting purposes, it is possible for administrators to verify a connection status between SAP Cloud for Customer, server-side integration for groupware and the user's mail server. If the connection is not available, the most likely cause is that the password has expired or some of the settings are not correct.

Context

To check connectivity between SAP Cloud for Customer, server-side integration for groupware and Microsoft Exchange or Gmail, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▎▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Users* ❳, and open a user.
2. Choose ▎▶ *Settings* ❯ *Check Mailbox Connectivity* ❳.

23.4.1.6.10 View Synchronization Issues

Administrators can use information about synchronization issues for troubleshooting purposes.

Context

SAP Cloud for Customer, server-side integration for groupware tracks all the synchronization issues that occur for users.

To view synchronization issues for users, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▎▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Users* ❳, and open the user whose issues you want to view.
2. Go to the *Issues* tab.

   > **i** Note
   >
   > If due to a synchronization issue, SAP Cloud for Customer, server-side integration for groupware automatically disables synchronization for the user, this user receives a notification e-mail with

> instructions on how to proceed. As the administrator, if you also want to be notified of these issues, you can specify one or more e-mail addresses to which the copies of these notification e-mails are sent. To do so, on the *Settings* tab, enter the e-mail addresses in the *E-Mails for Notifications* field.

23.4.1.6.11 Configure Share E-Mails Automatically

As an administrator, you can enable SAP Cloud for Customer, server-side integration for Microsoft Outlook to share e-mails automatically by changing settings in the user profiles.

Procedure

1. Log on as an administrator to SAP Cloud for Customer HTML client and go to ▶ *E-Mail Integration* ▶ *Groupware Settings* ▶ *Profile* ◀, open a profile, enable auto-sharing for e-mail, and choose *Save*.
2. Assign the updated profile to the appropriate users.

Related Information

Configure: Assign Other Profiles for Users [page 1013]

23.4.1.6.12 Configure the Language of the User Interface

If a user wants to use the solution in a language that is different from their initial logon language, administrators must apply localization for another language.

During the provisioning process, SAP Cloud for Customer, server-side integration for groupware detects the current SAP Cloud for Customer UI language and uses this language for user mailbox customization.

The language that SAP Cloud for Customer, server-side integration for groupware uses is the language of the user interface (UI) of SAP Cloud for Customer. To change the language of the add-in, you or your administrator must change the logon language of SAP Cloud for Customer.

> ! Restriction
>
> SAP Cloud for Customer, server-side integration for groupware only supports the following languages: English, German, French, Japanese, Portuguese, Russian, Simplified Chinese, and Spanish.

The following user interface elements belonging to SAP Cloud for Customer, server-side integration for groupware can be localized:

- Folder names

- Category names
- Information messages

Following their initial logon, if a user logs on to SAP Cloud for Customer in a different language, the UI language for the add-in isn't updated for provisioned users. Users can change their SAP Cloud for Customer, server-side integration for groupware UI language themselves on the dashboard under ▶ *Sync Settings* ❯ *Detailed Settings* ❯ *Localization* ❯.

> → Remember
>
> When a new localization is applied to the user, the user's mailbox is reinitialized and all previously synchronized data is removed from the mailbox. Therefore, make sure that the user has backed up all data before performing this operation.

Administrators can apply the localization to users as follows:

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Users* ❯, and select the user who wants to use the solution in another language.
2. Choose ▶ *Actions* ❯ *Apply Localization* ❯.

23.4.1.6.13 View User Statistics

To find out more information about a user's synchronization sessions, administrators can view user statistics.

Context

To view user statistics, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Users* ❯, and open the user whose statistics you want to see.
   A list of synchronization sessions appears in the list on the *Statistics* tab.
2. To see more details, under *Actions*, choose the icon to open the job.
   A session description and details open in a new page.
3. To download a session-related log, under *Actions*, choose the icon to download the log.

   You can show or hide columns in the list by using the ≡ icon.

23.4.1.6.14 View User-Related Activity History

As an administrator, you can view activities related to any user.

Context

For each activity, you can see the following information:

- Date and time when the activity occurred
- An e-mail address of the user that initiated the activity
- Type of the activity

To view a user's activities, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Users* ❯, and open the user whose activities you want to see.
2. Go to the *Activity* tab.

   A session description and details open in a new page.
3. To download an activity-related log, under *Actions*, choose the appropriate icon.

23.4.1.7 User Settings

Once your administrator has provisioned you and you have received the email confirmation, you can start with the following steps.

23.4.1.7.1 Configure: Install SAP Cloud for Customer, server-side integration for Microsoft Outlook

If the SAP Cloud for Customer, server-side integration for Microsoft Outlook was not installed for a provisioned user, an administrator can install it manually for that user.

Context

To install the add-in manually for users, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* 〉 *Groupware Settings* 〉 *Users* ◀, and select one or more users for whom you want to install the add-in.
2. Choose ▶ *Settings* 〉 *Install Add-In* ◀.

23.4.1.7.2 Personalize SAP Cloud for Customer, Server-Side Integration for Microsoft Outlook

You can personalize the settings if you like.

After your administrator has set up the server-side integration, you will notice the following changes in your e-mail application:

- SAP folders in the e-mail, contacts, and tasks
- Add-in sidebar and ribbon group
  In e-mail clients that support add-ins (Microsoft Outlook 2013 or later, or Microsoft Office 365), you will see a sidebar inline next to the e-mail message. In Microsoft Outlook 2013 or later, a new ribbon group appears in the *Home* tab in the main window or in the *Message* tab in the message window. This group provides access to the add-in commands.

To personalize your settings, in your SAP solution under ▶ *E-Mail Integration* 〉 *User Settings* 〉 *Sync Settings* ◀, change your profile accordingly.

23.4.1.7.3 Use Filters to Define Objects to Synchronize

Filters from your SAP solution appear in the synchronization settings for accounts, individual customers, as well as contacts.

When you set up synchronization for accounts, individual customers, and contacts under ▶ *E-mail Integration* 〉 *User Settings* 〉 *Sync Settings* 〉 *Detailed Settings* 〉 *Customize* ◀, the filters that appear include filters from

your SAP solution. You can see filters that your administrator created as well as any filters that you defined in personalization. You can use these filters to define which objects to synchronize.

23.4.1.7.4 Set the Language

When you log on to SAP Cloud for Customer the first time, the add-in uses the logon language as the default language for SAP Cloud for Customer, server-side integration for groupware. If you want to log on later in a different language, trigger the language update for the add-in manually.

Context

> → Remember
>
> When a new localization is applied, your mailbox is reinitialized and all previously synchronized data is removed from the mailbox. Therefore, make sure that you have backed up all of your data before performing this operation.

To update the language of the add-in to match the language with which you are currently logged on to SAP Cloud for Customer, do the following:

Procedure

1. Log on to your SAP solution in the HTML client.
2. Go to ❯ *E-Mail Integration* ❯ *User Settings* ❯ *Sync Settings* ❯ *Detailed Settings* ❯ and choose *Localization*. Your administrator can also apply localization for your user.

Results

The language in which you are logged on to SAP Cloud for Customer and your add-in now appear in the same language.

23.4.1.8 Manage Installation of SAP Cloud for Customer, server-side integration for Microsoft Outlook

As an administrator, you may want to mass-deploy the add-in, check installation status for a user, or install the add-in manually.

The SAP Cloud for Customer, server-side integration for Microsoft Outlook is an optional but essential part of SAP Cloud for Customer, server-side integration for groupware. The user provisioning process does not imply the automatic installation of the add-in for the user.

Open this video in a new window

Depending on the user's mailbox access type, you can install SAP Cloud for Customer, server-side integration for Microsoft Outlook in one of the following ways:

- If the Microsoft Exchange Direct Logon access type is used, you install the SAP Cloud for Customer, server-side integration for Microsoft Outlook after you change the user's e-mail address.
- If the Microsoft Exchange Impersonation access type is used, you install the SAP Cloud for Customer, server-side integration for Microsoft Outlook after you enable synchronization for the user.

23.4.1.8.1 Check Add-In Installation

As an administrator, you can remotely verify whether the SAP Cloud for Customer, server-side integration for Microsoft Outlook is installed for the user.

Context

To verify the installation status, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to *E-Mail Integration* *Groupware Settings* *Users* , and open a user.
2. Choose *Settings* *Check Add-In Status* .

23.4.1.8.2 Configure: Install SAP Cloud for Customer, server-side integration for Microsoft Outlook

If the SAP Cloud for Customer, server-side integration for Microsoft Outlook was not installed for a provisioned user, an administrator can install it manually for that user.

Context

To install the add-in manually for users, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▐▶ *E-Mail Integration* ❭ *Groupware Settings* ❭ *Users* ❭, and select one or more users for whom you want to install the add-in.
2. Choose ▐▶ *Settings* ❭ *Install Add-In* ❭.

23.4.1.8.3 Configure Freeze Description for Appointments, Visits, and Meetings in Microsoft Outlook

Administrators can make settings to freeze the description for appointments, visits, and meetings in their SAP solution after initial synchronization.

Log on to your SAP solution as an administrator and go to ▐▶ *E-Mail Integration* ❭ *Groupware Settings* ❭ *Settings* ❭ *Calendar Configuration* ❭. Select the checkbox to freeze the contents of the description field after initial synchronization.

23.4.1.8.4 Configure Auto-Sharing of Appointments and Meetings in Microsoft Outlook

Administrators can set up auto-sharing for appointments and meetings in the SAP solution.

Log on to your SAP solution as an administrator and go to ▐▶ *E-Mail Integration* ❭ *Groupware Settings* ❭ *Profiles* ❭ and select a profile. Under ▐▶ *Sync Settings* ❭ *Calendar Sync Options* ❭, select the appropriate checkboxes to enable auto-sharing according to your company's needs. Then apply these settings to the respective users.

23.4.1.8.5 Configure: Remove the SAP Cloud for Customer, server-side integration for Microsoft Outlook

Administrators can remotely remove the SAP Cloud for Customer, server-side integration for Microsoft Outlook that was installed for the user.

Context

To remove the add-in for users, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▌▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Users* ▌, and select one or more users for whom you want to remove the add-in.
2. Choose ▌▶ *Settings* ❯ *Remove Add-In* ▌.

23.4.1.8.6 Add Public IP Address to Allowlist

Administrators must add the following public IP address to allowlist.

- WDCTest: 20.185.255.18, 52.179.80.212
- WdcProd: 40.88.36.73, 52.191.194.36
- PerTest: 52.187.204.125, 13.72.240.240
- PerProd: 13.70.127.253, 13.70.65.174
- FraTest01: 51.4.142.102, 51.4.225.180
- FraProd01: 51.5.148.181, 51.5.247.149
- FraProd02: 51.4.142.136, 51.4.195.218

23.4.1.9 Customize SAP Cloud for Customer, Server-Side Integration for Groupware

As an administrator, you can customize the default appearance and behavior of the SAP Cloud for Customer, server-side integration for groupware.

You can customize:

- Which record types to show or hide in SAP Cloud for Customer, server-side integration for Microsoft Outlook or SAP Cloud for Customer, server-side integration for Gmail

- Which fields to show in both the record card (basic view) or in the detailed record view
- The sort order for record cards
- Criteria to use for searching the records
- How data should be retrieved for opened e-mails or events and how e-mail tracking should behave

23.4.1.9.1 Configure Record Types

Administrators can customize the fields that are available for all record types.

Context

Your company may not need to track certain information, or may use different terms than the terms in the add-in. You can customize each record type to fit your company's needs.

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Profiles* ◀, and open the profile that you want to edit.
2. Under *Add-In Settings*, choose the record types that you want to appear in the add-in.

   As you select record types, their record cards appear in the *Add-In Settings* tab, where you can further customize them.

23.4.1.9.2 Configure General Settings for Record Types

Administrators can configure fields for sorting and searching for each record type.

Context

To configure general settings for a record type, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Profiles* ❯ *Add-In Settings* ◀, on the record type you want to edit, choose *Settings*.

2. Configure the following settings:

   - Under *Sort By*, select the fields by which the record cards are sorted by when they appear in the main add-in window or in search results.
   - Under *Search By*, specify one or more fields to search by when users run a search.

23.4.1.9.3 Configure the Basic View

Administrators can define up to four fields to show in the basic view of each record type.

Context

To select which record fields to show in the record card, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* 〉 *Groupware Settings* 〉 *Profiles* 〉 *Add-In Settings* ◀, and on the record type you want to edit, choose *Basic View*.
2. In the *Fields in Basic View* list, select the field to show.

   Up to four fields can be shown at a time.

23.4.1.9.4 Configure the Detailed View

Administrators can define which fields to show and hide in the details view for records.

Context

To select which record field to show in the detailed view, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* 〉 *Groupware Settings* 〉 *Profiles* 〉 *Add-In Settings* ◀, and on the record type you want to edit, choose *Detailed View*.

2. Choose *Add field to detailed view* and select a field to add.

   You can add as many fields as you need.

23.4.1.9.5 Configure Reminders

Since SAP Cloud for Customer does not support reminders, SAP Cloud for Customer, server-side integration for groupware allows administrators to set a default reminder time for tasks, appointments, and visits retrieved from SAP Cloud for Customer.

Context

To set the default reminder time, do the following:

Procedure

1. Log on to your SAP solution as an administrator, go to ▶ *E-Mail Integration* 〉 *Groupware Settings* 〉 *Profiles* ⟩, and open the profile that you want to edit.

2. Under ▶ *Sync Settings* 〉 *General Sync Settings* ⟩, for tasks, appointments, or visits, set the reminder time in the *Remind About...* fields. If you want to disable a reminder, choose *Reminder is OFF*.

23.4.1.10 Switch from SAP Cloud for Customer Add-In for Microsoft Outlook to SAP Cloud for Customer, Server-Side Integration for Microsoft Outlook

In addition to uninstalling SAP Cloud for Customer Add-In for Microsoft Outlook, there are a few steps you should take to preserve any SAP data that is in your Microsoft Outlook e-mail client.

Context

> **i Note**
>
> The same user should not use both the client-side and the server-side add-in for Microsoft Outlook. Using the two solutions together or modifying appointments during the migration period will lead to duplicates. If you decide to use SAP Cloud for Customer, server-side integration for Microsoft Outlook, uninstall the SAP Cloud for Customer Add-In for Microsoft Outlook.

> **⚠ Caution**
>
> We do not support a migration from server-side back to client-side.

When you uninstall SAP Cloud for Customer Add-In for Microsoft Outlook, SAP-specific folders in the contacts, tasks, and e-mail areas remain. To prevent data loss and confusion, do the following:

Procedure

1. In Microsoft Outlook, in the contacts area, under the SAP-specific folder, copy all account and contact information you want to keep.

   You can copy your accounts and contacts into new, separate folders or into temporary folders.
2. Repeat step 1 for tasks and any other SAP-specific folders you may have in Microsoft Outlook.
3. When you have all data that you want to back-up copied into other folders, delete the SAP-specific folders.
4. For calendar synchronization:
   1. Ensure that the client-side add-in is disabled.
   2. Do not change appointments during the migration period when the client-side add-in is turned off and the server-side add-in does the initial sync.
      In particular, the *Subject* and *Start Date/Time* fields should not be changed during the migration period.

   When you install the SAP Cloud for Customer, server-side integration for Microsoft Outlook, new SAP folders are created.

Related Information

Uninstall the Add-In for Microsoft Outlook Integration [page 947]

23.4.1.11 Main Concepts

A list of the main concepts the administrator should be familiar with when managing SAP Cloud for Customer, server-side integration for groupware for Microsoft Outlook or Gmail.

23.4.1.11.1 Main Concepts

Main concepts for administrators

Main Concepts for SAP Cloud for Customer, server-side integration for groupware

Term	Description
SAP Cloud for Customer - Administrator	A user that belongs to an SAP Cloud for Customer tenant and has administrative rights. Only an administrator can access the *Groupware Settings* tab and manage other administrators or ordinary users of SAP Cloud for Customer, server-side integration for Microsoft Outlook or SAP Cloud for Customer, server-side integration for Gmail.
SAP Cloud for Customer - User	A user in an SAP Cloud for Customer tenant that does not have administrative rights. A user has no access to the *Groupware Settings* tab and cannot manage other users.
profile	A collection of configuration settings and parameters that control how SAP Cloud for Customer, server-side integration for Microsoft Outlook or SAP Cloud for Customer, server-side integration for Gmail behaves for a specific set of users to better fit their needs.
profile template	A profile that serves as a template for a user. A profile template provides some predefined configuration settings that can later be customized by a user. When a user changes settings in the profile template, such profile template becomes a customized profile.
default profile template	A profile that provides users with the default SAP Cloud for Customer, server-side integration for Microsoft Outlook or SAP Cloud for Customer, server-side integration for Gmail configuration. A default profile template is created automatically and cannot be edited. It can also be used as a basis for creating new or customized profiles.
customized profile	A profile that is created automatically as soon as the user changes any settings in the profile assigned to that user. Both administrators and users can edit their profiles, thus creating customized profiles. Customized profiles do not appear in the list of profiles and cannot be assigned to other users. Customized profiles can only be used by the user who created them.
organization	A collection of users that share a common set of general settings. The name of the organization together with the organization settings can be changed by an administrator.
default organization	An organization that the administrator is automatically assigned to during the provisioning process. For ordinary users, a default organization is used if no other organization is explicitly specified by the administrator. The default organization cannot be deleted, but both the organization name and the organization settings can be changed by an administrator.

23.4.1.12 Stages of Migration to OData V2

SAP plans to encourage and then enforce users to switch to Open Data Protocol, version 2 (OData V2).

OData API V2 offers improved performance and an expanded set of main business objects and collections (data points).

We want to ensure that all our users have migrated to OData V2 by August 2020. We've scheduled the following steps toward this goal:

Encourage Mode

Activated first week of June 2020 in the production system through 14 July 2020.

- Users can still use the server-side add-in, but error messages appear encouraging them to contact their administrator to make the switch to OData V2.
- For administrators, on the *Profile* and *Users* tabs, columns appear that show the OData status (V1 or V2) for the add-in and sync. Any rows that aren't yet in V2 appear in red.

Enforce Mode

Activated 15 July 2020 in the production system.

- Users can't use the SAP solution. Error messages appear, explaining why the service isn't accessible.
- For administrators, on the *Profile* and *Users* tab, columns appear that show the OData status (V1 or V2) for the add-in and sync. Any rows that aren't yet in V2 appear in red.

Extensions

If you have concerns with this process or schedule, please raise an incident with detailed information and reasons for your extension request.

> **i Note**
>
> Extensions are only available until the August 2020 release upgrade.

Related Information

Configure: Switch to OData V2 [page 1032]

23.4.1.13 Configure: Switch to OData V2

Administrators must switch all profiles in their organizations to Open Data Protocol, version 2 (OData V2).

Context

OData API V2 offers improved performance and an expanded set of main business objects and collections (data points).

> **i Note**
>
> The last date to switch to OData V2 is 15 July 2020.Administrators can view the OData status (V1 or V2) for the add-in and sync on the *Profile* and *Users* tab. Any rows that are not switched to V2 appear red.

Switch each profile to OData V2 data manually.

> **→ Recommendation**
>
> When you have switched add-in settings or sync settings in a profile to OData V2, it's only possible to go back to OData V1 with assistance from support.
>
> Before switching all profiles to OData V2, we suggest that administrators:
>
> 1. Copy one profile to create a new one and convert it to OData V2.
>   After the conversion is done, delete the original profile.
> 2. Review conversion notes and address and then dismiss them.
> 3. Apply the profile only to yourself and verify that it works correctly.
> 4. Apply the profile to other users who had it previously.

Procedure

1. Log on to your SAP solution as an administrator and go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Profiles* ❯ .
2. Open the profile that you want to switch to OData V2.
3. Under ▶ *Sync Settings* ❯ *OData API V2* ❯ , toggle the switch on.
4. Under ▶ *Add-In Settings* ❯ *OData API V2* ❯ , toggle the switch on.
5. Save your changes.

   If you have tested OData V2 change as outlined in the note, save your changes and apply them to all users in the profile.
6. Repeat these steps for each profile in your organization.

Related Information

23.4.2 Get Started

The SAP Cloud for Customer, server-side integration for Microsoft Outlook allows you to exchange information between Microsoft Outlook and SAP Cloud for Customer.

23.4.2.1 Confirm Exchange Credentials and Start Synchronization

To start using SAP Cloud for Customer, server-side integration for groupware, you need to provide some information about you and your configuration by signing up for an account in SAP Cloud for Customer, server-side integration for groupware. Your administrator may complete the sign-up process for you.

Context

> → Tip
>
> If you try to complete the steps below, but the fields are grayed out, it means that your system administrator has already completed these steps for you.

Procedure

1. Specify your e-mail account.

   Specify your Microsoft Office 365 or Microsoft Exchange account that will be used with SAP Cloud for Customer, server-side integration for groupware. Under ▷ *Sync Settings* ❯ *E-Mail Configuration* ❯ *Change* ◁, do one of the following:

   - To log in to your Microsoft Office 365 account, click the Microsoft Office 365 logo. In the window that appears, specify your account e-mail and password.
   - If you use an on-premise installation of Microsoft Exchange, your exchange server is hosted by some third-party provider, or you use Outlook.com Mail (Outlook.com), choose the button containing the Microsoft Exchange logo, click the advanced setup link, and do the following:
     1. Enter your e-mail address.
     2. Enter your password.

3. In some configurations, you may be asked to provide your exchange user name. In this case, specify it in the *User Name* box. This name is usually your domain name followed by a backslash and your account ID. For example, if your domain is "work" and your Windows account ID is "johndoe," enter work\johndoe.

4. In most cases, SAP Cloud for Customer, server-side integration for groupware automatically finds the required EWS endpoint URL, but if the solution did not find it or you need to specify it manually, select the *Specify Exchange Web Services URL Manually* check box and enter the Exchange Web Services endpoint URL.

5. Choose *Next*.

2. Select the data that you want to synchronize.

Select what types of records you want to synchronize – appointments, tasks, or contacts – by activating or deactivating the corresponding button:

○ Appointments and Tasks
SAP Cloud for Customer, server-side integration for groupware synchronizes appointments and tasks that meet the following criteria:
  ○ Of which you are the owner
  ○ Which are not complete
  ○ Which are from the past two weeks and are up to four weeks in the future
○ Contacts
For contacts, you can click *Customize* and define the contacts you want to be synchronized:
  ○ All available contacts
  ○ Only my contacts
  ○ Only contacts from the specified SAP set
    Sets are views you can create in SAP that contain a specific set of contacts. SAP Cloud for Customer, server-side integration for groupware automatically retrieves a list of sets available for your contacts so that you can pick the one that matches your preference.

> **i Note**
>
> When using a custom SAP set, select the set that includes contacts owned by you. Otherwise, new contacts that you add from Microsoft Exchange to SAP may be removed from Microsoft Exchange at a later time because they are not the part of the selected set.

3. To complete the configuration process, choose *Finish*.

SAP Cloud for Customer, server-side integration for groupware triggers the initial synchronization in the background and installs the SAP Cloud for Customer, server-side integration for Microsoft Outlook for compatible e-mail clients.

Related Information

Maximum Number of Synchronized Records [page 997]

23.4.2.2 Use SAP Cloud for Customer Server-Side Integration for Microsoft Outlook on Mobile Devices

If your administrator has made the necessary settings, you can use SAP Cloud for Customer, server-side integration for Microsoft Outlook on the Microsoft Outlook app.

> ℹ Note
>
> Due to restrictions in the Microsoft Outlook for mobile app, the add-in is only available in the e-mail read mode.

23.4.2.3 Open the Add-In

The add-in works in the context of your e-mail or appointment, and provides you with rich contextual information from your SAP solution and powerful actions to process e-mail efficiently.

Procedure

To open the add-in, do one the following:

○ In Microsoft Outlook on Windows, under ▐▶ *Home* ❯ *SAP* ▌ choose *Open*.

○ In Microsoft Outlook for Mac, or Outlook for Web, click the *SAP Cloud for Customer, server-side integration* tab located right above your e-mail message or appointment.

○ When composing a response to someone, click the *Add-Ins* button above the message, and select *SAP Cloud for Customer, server-side integration* from the list.

23.4.2.4 View Information from SAP Cloud for Customer

When you select an e-mail, the add-in automatically recognizes e-mails from customers defined as contacts in your SAP solution, based on the e-mail address. Information related to that contact and account appears in the side pane. You can access contact and account information, as well as related opportunities, leads, sales orders, and activities for the current week, and you can personalize how you would like to view the content.

23.4.2.5 Pin Information in the Side Pane

You can pin information in the side pane so that it persists even when you click another item in Microsoft Outlook.

> i Note
>
> Pinning is currently supported in Outlook 2016 for Windows (build 7668.2000 or later for users in the **Current** or **Office Insider Channels**, build 7900.xxxx or later for users in **Deferred** channels). For more information, see the Microsoft Outlook documentation.

23.4.3 Manage E-Mails

If you use the SAP Cloud for Customer, server-side integration for Microsoft Outlook, you can do a lot right from your inbox. For example, you can add e-mails to your SAP solution or add e-mails with reference to other objects.

23.4.3.1 Share E-Mails with the SAP Solution

You can share formatted or unformatted e-mail messages with your SAP solution. As the e-mail has been shared, it appears as a completed task in SAP. This task is associated automatically with other relevant SAP records that were mentioned in the e-mail.

Context

> i Note
>
> If you skipped the registration of SAP Cloud for Customer, server-side integration for groupware or did not complete the registration wizard, you cannot share your e-mails with the SAP solution via the *SAP E-Mails* folder or by assigning them to the SAP Cloud for Customer category.

Procedure

To share an e-mail, do one of the following:

- You can assign e-mails to the SAP category by using *Categorize* in Microsoft Outlook.

  > i Note
  >
  > In Microsoft Outlook, when you create a new e-mail, the e-mail category is assigned automatically, before synchronization.

○ Move new or existing items to the appropriate SAP-specific folder in Microsoft Outlook: *SAP Contacts*, *SAP E-Mail*, or *SAP Tasks*.
You can also use these SAP-specific folders in Outlook to access activities stored in the SAP solution.

> **i Note**
>
> After an e-mail is synchronized, the solution moves it back to the *Inbox* or *Sent Items* folder, depending on whether it was sent or received.

○ In the corresponding item card, click *Add to Activity History*.
In Microsoft Outlook, you can also save this e-mail for all related SAP records by using *Save this E-Mail*.

> **i Note**
>
> Any images in the body of the e-mail appear as attachments in your SAP solution.

23.4.3.2 Share E-Mails Automatically

Your administrator can set SAP Cloud for Customer, server-side integration for Microsoft Outlook to synchronize all e-mails automatically.

23.4.3.3 Configure Share E-Mails Automatically

As an administrator, you can enable SAP Cloud for Customer, server-side integration for Microsoft Outlook to share e-mails automatically by changing settings in the user profiles.

Procedure

1. Log on as an administrator to SAP Cloud for Customer HTML client and go to ▶ *E-Mail Integration* ▶ *Groupware Settings* ▶ *Profile* ◀, open a profile, enable auto-sharing for e-mail, and choose *Save*.
2. Assign the updated profile to the appropriate users.

Related Information

Configure: Assign Other Profiles for Users [page 1013]

23.4.3.4 Select Contacts Related to an Account

When you create an e-mail, appointment, visit, or task from your inbox, you can see contacts that are related to the account that you defined for the activity. Select the appropriate contacts to include in the activity.

If you want to add other contacts, click the header to see other filters from your SAP solution, such as *My Contacts* or *All Contacts*.

23.4.3.5 Save E-Mail Attachments

If your e-mail contains contacts that exist in the SAP solution, you can save e-mail attachments directly to this contact.

Procedure

To save the e-mail attachment, do one of the following:

- In the add-in on the contact card, click *Attach*.
  In the dialog box that appears, select the documents you want to attach and click *Attach*.
- You can assign e-mails to the SAP category by using *Categorize* in Microsoft Outlook.

  > **i Note**
  >
  > In Microsoft Outlook, when you create a new e-mail, the e-mail category is assigned automatically, before synchronization.

- Move new or existing items to the appropriate SAP-specific folder in Microsoft Outlook: *SAP Contacts*, *SAP E-Mail*, or *SAP Tasks*.
  You can also use these SAP-specific folders in Outlook to access activities stored in the SAP solution.

  > **i Note**
  >
  > After an e-mail is synchronized, the solution moves it back to the *Inbox* or *Sent Items* folder, depending on whether it was sent or received.

23.4.4 Manage Contacts

If you use SAP Cloud for Customer, server-side integration for Microsoft Outlook, you can create contacts, associate them with other objects in your SAP system, pin them, and even add contacts from your SAP solution into Microsoft Outlook.

23.4.4.1 Share a Contact with the SAP Solution

You can assign contacts to different items in your SAP solution, right from your e-mail application.

Procedure

1. Share a contact with the SAP solution by doing one of the following:

   ○ Move new or existing items to the appropriate SAP-specific folder in Microsoft Outlook: *SAP Contacts*, *SAP E-Mail*, or *SAP Tasks*.
   You can also use these SAP-specific folders in Outlook to access activities stored in the SAP solution.

   > **i Note**
   >
   > After an e-mail is synchronized, the solution moves it back to the *Inbox* or *Sent Items* folder, depending on whether it was sent or received.

   ○ You can assign items to the SAP category in the same way: by using *Categorize* in Microsoft Outlook. The item is added to your SAP solution at the next synchronization session.

   > **i Note**
   >
   > **Apple Mac users:** Be aware that, by default, when you assign a contact to a category, all messages that you receive from that contact are automatically assigned to the same category. Since contacts shared with the add-in are automatically assigned to the SAP category, messages received from a shared contact will also be assigned to the SAP category and, as a result, will be automatically shared with the SAP solution during the next synchronization session. To turn off this preference, on the Outlook menu, choose ⏵ *Preferences* ⏵ *Categories* ⏴, and then deselect the *Assign categories to messages from categorized contacts* check box.

   ○ If a new person is referenced in your e-mail, you can add this person to your SAP solution as a contact from the *Not Found in SAP* card by clicking the *Contact* icon.

2. To access existing contacts in your SAP solution, do one of the following:

   ○ If the contact mentioned in your e-mail is also available in your SAP solution, the corresponding contact card appears in the add-in.

   ○ SAP contacts that match the synchronization filters can be found in the *SAP Contacts* folder in Microsoft Outlook. You can change these settings in your SAP solution under ⏵ *E-Mail Integration* ⏵ *User Settings* ⏵ *Dashboard* ⏵ *Customize* ⏴.

23.4.4.2 Edit a Shared Contact

Changes you make in your e-mail application are transferred to your SAP solution.

Procedure

To edit contact details, do one of the following:

○ In the contact card in the add-in, click *Details*.
○ Open the contact, appointment, or visit in Microsoft Outlook and edit the details as needed. If this contact, appointment, or visit is assigned to the SAP category or (in the case of contacts) located in the appropriate SAP folder, your changes are automatically synchronized with your SAP solution.

Results

Changes that were made to the contact in the add-in appear immediately in the SAP solution, while changes made in Microsoft Outlook will appear in the SAP solution only after the next synchronization.

23.4.4.3 Add an E-Mail to the Contact's Activity History

You can track interactions with a contact by adding e-mails to the activity history.

Procedure

To add an email to the contact's activity history (as a completed task), do one of the following:

○ In the corresponding item card, click *Add to Activity History*.
○ You can assign items to the SAP category in the same way: by using *Categorize* in Microsoft Outlook. The item is added to your SAP solution at the next synchronization session.
○ Move new or existing items to the appropriate SAP-specific folder in Microsoft Outlook: *SAP Contacts*, *SAP E-Mail*, or *SAP Tasks*.
   You can also use these SAP-specific folders in Outlook to access activities stored in the SAP solution.

> **i** Note
>
> After an e-mail is synchronized, the solution moves it back to the *Inbox* or *Sent Items* folder, depending on whether it was sent or received.

23.4.4.4 Open a Contact in the SAP Solution

You can save time by accessing contact information right from your e-mail application.

Procedure

To open a contact in the SAP solution right from your e-mail application, do one of the following:

- On the corresponding card, depending on the activity type, do one of the following:
  - For contacts:
    Choose ⁰⁰⁰ ▶ ❯ *Open in CRM* ❯.
  - For tasks, appointments, or visits:
    Click the activity type (task, appointment, or visit) and choose ⁰⁰⁰ ▶ ❯ *Open in CRM* ❯.
- In Microsoft Outlook , open the contact and click the URL specified in the *Web page address* box.

23.4.4.5 Assign Other Activities to a Contact

For tracking, you can assign items in the SAP solution to a contact.

Procedure

To assign an activity or associate a contact with other records, on the contact card, click ⁰⁰⁰ and choose the option you need.

23.4.5 Manage Appointments and Visits

If you use SAP Cloud for Customer, server-side integration for Microsoft Outlook, you can synchronize appointments and visits so that updates in your SAP solution appear in Microsoft Outlook, and the other way around.

23.4.5.1 Auto-Sharing for Appointments and Meetings in Microsoft Exchange

If you use Microsoft Outlook and your administrator has made the required settings, your system automatically synchronizes appointments and meetings.

Your administrator can set up your SAP solution to synchronize appointments and meetings according to one of these sets of criteria:

- Any appointments or meetings that include at least one attendee whose e-mail address is defined as a contact in your SAP solution
- All appointments or meetings, even if the attendees are not defined in your SAP solution

> ### i Note
>
> Auto-sharing does not work retroactively. It is only valid for appointments and meetings that are created after your administrator has set up this feature.

23.4.5.2 Configure Auto-Sharing of Appointments and Meetings in Microsoft Outlook

Administrators can set up auto-sharing for appointments and meetings in the SAP solution.

Log on to your SAP solution as an administrator and go to ▶ *E-Mail Integration* ❭ *Groupware Settings* ❭ *Profiles* ❭ and select a profile. Under ▶ *Sync Settings* ❭ *Calendar Sync Options* ❭, select the appropriate checkboxes to enable auto-sharing according to your company's needs. Then apply these settings to the respective users.

23.4.5.3 Freeze Description for Appointments, Visits, and Meetings in Microsoft Outlook

If your administrator has made the necessary settings, the description of appointments, visits, and meetings stays the same, even if other details are updated and synchronized.

This feature can be useful if you want to include company-internal information in the notes for an appointment, visit, or meeting.

When this feature is enabled and you create an appointment, visit, or meeting in Microsoft Outlook:

- The description is synchronized initially and saved as a note in the SAP solution.
- If you update the appointment, visit, or meeting in your SAP solution, any changes to the description are not synchronized.

When this feature is enabled and you create an appointment, visit, or meeting in your SAP solution:

- The description is synchronized initially and added to the body in Microsoft Exchange.
- If you update the appointment, visit, or meeting in Microsoft Outlook, any changes to the description are not synchronized.

23.4.5.4 Configure Freeze Description for Appointments, Visits, and Meetings in Microsoft Outlook

Administrators can make settings to freeze the description for appointments, visits, and meetings in their SAP solution after initial synchronization.

Log on to your SAP solution as an administrator and go to *E-Mail Integration* > *Groupware Settings* > *Settings* > *Calendar Configuration* . Select the checkbox to freeze the contents of the description field after initial synchronization.

23.4.5.5 Synchronize Appointments or Visits with the SAP Solution

Manage your schedule by sharing your appointments and visits with your SAP solution.

Context

> i Note
>
> For calendar events, all future appointments and visits are synchronized. For visits or appointments in the past, only those from the past 30 days are synchronized to the SAP solution. Appointments and visits that don't fall within this range still appear in your calendar, but are skipped during synchronization.

Procedure

To share an appointment or visit with your SAP solution, do one of the following:

- You can assign items to the SAP category in the same way: by using *Categorize* in Microsoft Outlook. The item is added to your SAP solution at the next synchronization session.

- In the corresponding item card, click *Add to Activity History*.

- In the add-in, choose ▶ + ❯ *<activity type>* ❯.
  After you create the activity this way, it appears in the appropriate SAP-specific folder in Microsoft Outlook and is assigned immediately to the SAP category in Microsoft Outlook. As a result, it's automatically shared with the SAP solution.

Results

- Appointments or visits for which you **are** the organizer or owner are synchronized in both directions. In other words, if you change the appointment or visit in either your inbox or your SAP solution, the change is reflected in the other location too.
- Appointments or visits for which you **aren't** the organizer or owner are synchronized in one direction only - from your inbox to your SAP solution.

23.4.5.6 Configure Which Visits to Synchronize

In SAP Cloud for Customer, when associated with visits, users can be either visit organizers or visit owners. As an administrator, you must configure which visits are synchronized for users.

Context

You can define which visits must be synchronized for the user – where the user is an owner or organizer – as follows:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Settings* ❯.
2. In the *Sync Visit To* field, select whether you want to sync visits to the owner or the organizer.

23.4.5.7 Edit an Appointment or Visit

Need to edit an appointment or visit? No problem!

Procedure

To edit details of an appointment or visit, do one of the following:

○ In the add-in on the appointment or visit card, choose *Details*.
  To edit an appointment or visit that is associated with another item such as a contact:
  1. In the record card for that contact, choose the appointments or visits bar.
  2. Click the appointment or visit that you want to edit.
  3. To edit a field, click the pencil icon.
○ Open the contact, appointment, or visit in Microsoft Outlook and edit the details as needed. If this contact, appointment, or visit is assigned to the SAP category or (in the case of contacts) located in the appropriate SAP folder, your changes are automatically synchronized with your SAP solution.

23.4.5.8 Recurring Appointment Support for Outlook Integration

You can sync recurring events and updates to these events from MS Outlook to SAP Cloud for Customer for *Visits* and *Appointments*. You can also update separate occurrences in both directions. The appointment frequency can be daily, weekly, and monthly.

Appointments and *Visits* are created in SAP Cloud for Customer and the instances have a reference link to the parent appointment. Note the parent appointment is not visible in SAP Cloud for Customer. An occurrence deleted in MS Outlook is considered cancelled in SAP Cloud for Customer on sync. If you delete an entire series in MS Outlook, all instances with a parent appointment will be deleted/cancelled in SAP Cloud for Customer.

Note that you cannot delete an occurrence from SAP Cloud for Customer. You can only cancel it. This is not valid for visits.

The limit on occurrences that are visible in SAP Cloud for Customer are as follows:

● Daily and weekly frequency: two months
● Monthly frequency: six months

> **i Note**
>
> While saving the recurring event from MS Outlook using an add-in, only account and contact fields are available for linkage. Also, in MS Outlook you cannot share a separate occurrence. You can only share the whole series.

The following features are not supported:

● Google calendar
● Attachments sync for recurring events

- Share of recurring events by attendees, only organizers can share recurring events
- Yearly pattern. Sync issue occurs if synchronization is attempted
- Safe description mode for recurring event is not supported (*Freeze Description Fields* option in tenant settings)
- Sharing of individual occurrences
- Private recurring events synchronization is not supported. Sync issue occurs if synchronization is attempted.
- Sync for all-day recurring events. Sync issue occurs if synchronization is attempted.
- Daylight time saving not automatically supported. Time for occurrences can be inaccurate for period when daylight saving time rules for MS Outlook time zone and SAP Cloud for Customer time zone are different.
- Changes in past occurrences on SAP Cloud for Customer side are not synced to MS Outlook.
- Updates in SAP Cloud for Customer after 60 days of the occurrence WILL NOT be reflected in MS Outlook on the next synchronizations.

23.4.5.9 Select Contacts Related to an Account

When you create an e-mail, appointment, visit, or task from your inbox, you can see contacts that are related to the account that you defined for the activity. Select the appropriate contacts to include in the activity.

If you want to add other contacts, click the header to see other filters from your SAP solution, such as *My Contacts* or *All Contacts*.

23.4.5.10 Open an Appointment or Visit in the SAP Solution

If you're working in your e-mail in box but need to access an appointment or visit in your SAP solution, you can open it right from your inbox.

Procedure

1. To open an appointment or visit, on the item or contact card click *Appointment* or *Visit*.
2. Choose ▶ *...* ▶ *Open in CRM* ▶.

23.4.5.11 Delete, Cancel, or Reassign a Meeting or Appointment

In both your SAP solution and your calendar (in Google or Microsoft Exchange), you can cancel or delete meetings, or reassign a meeting to another organizer.

Here's how the system responds:

> **i Note**
>
> When appointments are changed, attendees are notified automatically.

Your Actions and System Results

Your Action	Result
In your calendar, you remove an attendee of a meeting.	After synchronization, the attendee is also removed from the meeting in your SAP solution.
You're the organizer or owner of a meeting or appointment and you cancel it in your SAP solution.	After synchronization, the appointment is also canceled in your calendar.
In your SAP solution, you delete or cancel a meeting or reassign it to a new meeting owner.	At synchronization, the meeting is deleted from the calendar of the original organizer or owner.
In your SAP solution, you delete a meeting only (without canceling it or reassigning it to another owner).	At synchronization, the meeting is no longer shared, but it remains in the calendar of the original organizer or owner.

23.4.6 Manage Tasks

If you use the SAP Cloud for Customer, server-side integration for Microsoft Outlook, you can add, share, and open tasks.

23.4.6.1 Share a Task with the SAP Solution

Sharing your tasks with the SAP solution helps you stay organized.

Procedure

Share a task with the SAP solution by doing one of the following:

- You can assign items to the SAP category in the same way: by using *Categorize* in Microsoft Outlook. The item is added to your SAP solution at the next synchronization session.
- Move new or existing items to the appropriate SAP-specific folder in Microsoft Outlook: *SAP Contacts*, *SAP E-Mail*, or *SAP Tasks*.
  You can also use these SAP-specific folders in Outlook to access activities stored in the SAP solution.

  > **i Note**
  >
  > After an e-mail is synchronized, the solution moves it back to the *Inbox* or *Sent Items* folder, depending on whether it was sent or received.

- In the add-in, choose ▷ + ❯ *<activity type>* ❯.
  After you create the activity this way, it appears in the appropriate SAP-specific folder in Microsoft Outlook and is assigned immediately to the SAP category in Microsoft Outlook. As a result, it's automatically shared with the SAP solution.

23.4.6.2 Edit a Task

Need to update a task? No problem!

Procedure

You can edit task details by doing one of the following:

- Open the task in Microsoft Outlook and edit the task details.

> i Note
>
> Changes that you make with this method appear in the SAP solution only after the next synchronization.

  If this task is assigned to the SAP category or located in the *SAP Tasks* folder, your changes will be automatically synchronized with the SAP solution.
- In the add-in on the record card, click *Tasks* and then select the task you want to edit.

> i Note
>
> Changes that you make with this method appear immediately in the SAP solution.

23.4.6.3 Select Contacts Related to an Account

When you create an e-mail, appointment, visit, or task from your inbox, you can see contacts that are related to the account that you defined for the activity. Select the appropriate contacts to include in the activity.

If you want to add other contacts, click the header to see other filters from your SAP solution, such as *My Contacts* or *All Contacts*.

23.4.6.4 Open a Task in the SAP Solution

You can save time by accessing contact information right from your e-mail application.

Context

To open a task in the SAP solution right from your e-mail application, do the following:

Procedure

1. On the item or contact card, click *Task*.
2. Choose ▶ *...* ▶ *Open in CRM* ▶ .

23.4.7 FAQ for SAP Cloud for Customer, Server-Side Integration for Microsoft Outlook

Having trouble using this add-in? Check this list of questions and answers for help.

In the dashboard, you can find more information about many questions you may have. Additionally, when SAP Cloud for Customer, server-side integration for Microsoft Outlook cannot access your SAP or Microsoft Exchange data, or when synchronization fails ten consecutive times, you receive an e-mail notification of the problem.

23.4.7.1 How can I resolve synchronization issues?

A synchronization issue occurs when SAP Cloud for Customer, server-side integration for groupware is unable to synchronize data between your SAP solution and Microsoft Exchange due to some reason.

Context

Synchronization issues are caused by incomplete data in your e-mail application (like missing contact's last name) or by rules in your SAP solution that may prevent users from editing or deleting records of certain types. Another cause of synchronization problem is Microsoft exchange misconfiguration. When Microsoft exchange is not configured correctly, the actual exchange metadata URL does not match the URL Microsoft exchange embeds into the identity token. Server-side integration uses the following basic steps to validate the exchange identity token:

1. Retrieve exchange identity token from Microsoft exchange.
2. Parse exchange identity token and extract amurl parameter (this is the exchange metadata URL).
3. Send HTTP GET request to exchange metadata URL to retrieve the keys and confirm the token validity.
4. Use retrieved information for validating token signature.

For detailed information on how exchange metadata URL is used, see: https://docs.microsoft.com/en-us/office/dev/add-ins/outlook/validate-an-identity-token ↗ . To resolve the microsoft exchange misconfiguration, please contact your system administrator.

If a synchronization issue occurs, SAP Cloud for Customer, server-side integration for groupware uses one of the methods to notify the user about the situation:

- The item for which an issue occurred is assigned to two categories – the *Sync Error* category and the status category that provides more details about the issue.
- Information about the synchronization issue appears on the *Issues* page in the dashboard of SAP Cloud for Customer, server-side integration for groupware. To view issues for a certain item type, under *Issues*, select the item type.

> → Tip
>
> You can easily open the SAP (or Microsoft Exchange, depending in the cause) item that caused the issue by clicking the corresponding icon in the issue description.

To resolve a synchronization issue, do the following:

Procedure

1. If the issue occurred because the required field is empty, fill in the missing data.
2. If you do not know how to resolve the issue, contact your system administrator.

23.4.7.2 How can I renew account credentials?

If your Microsoft Exchange or SAP credentials become outdated, SAP Cloud for Customer, server-side integration for groupware can no longer synchronize your data. You receive a notification e-mail informing you of the problem; the corresponding message also appears in the dashboard.

Context

To renew your Microsoft Exchange or SAP credentials, do the following:

Procedure

1. In the dashboard of SAP Cloud for Customer, server-side integration for groupware, in the connection status section, click *Change Settings*.
2. Enter your new credentials.
3. (Optional) Force synchronization to ensure that the status of your items is updated.

23.4.7.3 How do I, as an administrator, grant access to the mailbox used with server-side integration?

When you try to authenticate the Office365 mailbox into server-side integration, an error message *Need admin approval* is displayed.

Context

The issue occurs because the option *Users can consent to apps accessing company data on their behalf* is set to *No*. This option is available in customer Azure active directory through ▶ *Enterprise applications* ▶ *User settings* ◀. You can use the following methods to grant access to the mailbox:

- Grant admin consent for server-side integration
- Allow Office 365 administrator to give consent during initial login.
- Allow users to provide consent to third-party applications.

For more information, see:

- Azure Active Directory consent framework ✎
- Understanding Azure AD application consent experiences

23.4.7.3.1 How can I grant admin consent for server-side integration?

You, as an administrator can grant admin consent for server-side integration as follows:

Procedure

1. Log on to Azure AD.
2. Go to *Enterprise Applications* and find *SAP Cloud for Customer, server-side integration* in the list.

   Application may not be present in the list if none of the users previously consented the application on their behalf.

3. Go to ▎ *Permissions* ❯ *Grant Admin consent for %CompanyName%* ❯.

4. Log in with Office 365 admin credentials and click *Accept*.

Results

A *Signed In successfully* message appears. A list of consented permissions is displayed in the *Admin Consent* tab on the application page. You can go to *User Settings* in SAP Cloud for Customer and grant access to the mailbox.

23.4.7.3.2 How can I allow Office 365 administrator to give consent during initial login?

Make sure that the Office 365 administrator is an SAP Cloud for Customer user and provisioned as a server-side integration user.

Procedure

1. Log on into SAP Cloud for Customer as an Office 365 administrator.

2. Go to ▎ *User Settings* ❯ *Change settings* ❯ in *MAIL SERVER CONNECTION STATUS*.

3. In the *Permissions Required* dialog box, click the checkbox *Consent on behalf of your organization* and click *Accept*.

Results

A *Signed in successfully* message appears. A consent has been provided for the application for your organization and you are able to authenticate successfully. If the Office 365 administrator does not need server-side integration, start a *Reset mailbox* procedure in the *Groupware Settings* tab. You can also deprovision from server-side integration.

23.4.7.3.3 How can I allow users to provide consent to third-party applications?

As an administrator, you can allow users to provide consent to third-party applications.

Procedure

1. Log on to Azure AD.
2. Go to ▌ *Enterprise applications* ❯ *User settings* ▌.
3. Switch *Users can consent to apps accessing company data on their behalf* to *Yes*.

   When this setting is enabled, you can provide consent to any third-party applications, which may not meet company's security policies.

23.5 SAP Cloud for Customer, Server-Side Integration for Gmail

Like the client-side solution, the server-side integration powers your inbox with contextual insights from SAP Cloud for Customer. It also adds intelligent features that make it easy to get things done right from your Gmail inbox.

SAP Cloud for Customer, server-side integration for Gmail synchronizes your information at server level, so client-level setup is minimized.

> **i Note**
>
> SAP Cloud for Customer, server-side integration for Gmail is available:
>
> - As part of SAP Sales Cloud, enterprise edition
> - In English only

Scope and Configure SAP Cloud for Customer, Server-Side Integration for Gmail [page 1054]
   As an administrator, you must define and set up the server-side integration for Gmail.

Set Up SAP Cloud for Customer, Server-Side Integration for Gmail [page 1080]
   SAP Cloud for Customer, server-side integration for Gmail allows you to exchange information between Google applications and SAP Cloud for Customer. To use this feature, you'll need to complete a couple one-time setup steps.

Get Started [page 1085]
   With SAP Cloud for Customer, server-side integration for Gmail, you can see and use information from your SAP solution right from your inbox.

23.5.1 Scope and Configure SAP Cloud for Customer, Server-Side Integration for Gmail

As an administrator, you must define and set up the server-side integration for Gmail.

SAP Cloud for Customer, server-side integration for Gmail is a service that performs two-way synchronization of data between SAP Cloud for Customer and Gmail. It allows users to interact with SAP Cloud for Customer directly from an e-mail application.

Administrators must set up this integration for users by provisioning users, managing provisioned users, creating organizations and assigning users to them, and creating and managing profiles with configuration settings.

23.5.1.1 Access the Groupware Settings

Only SAP Cloud for Customer administrators can access the groupware settings. Ordinary users (SAP Cloud for Customer tenants without administrative rights) do not have access to the groupware settings. Therefore, before proceeding to the groupware settings, make sure that you have an appropriate user in SAP Cloud for Customer that has administration permissions.

To access the groupware settings, in SAP Cloud for Customer, go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ◀.

When you access the *Groupware Settings* tab for the first time as an administrator, you are automatically provisioned to the SAP Cloud for Customer, server-side integration for groupware. Specifically, this means that you are automatically:

- Added to the default organization
- Assigned a default profile
- Provided with the access to the *E-Mail Integration* tab, where you can configure SAP Cloud for Customer, server-side integration for groupware from an end-user perspective using the dashboard. For more information, see the reference in the related information section.

When you are provisioned by the system, you also receive a notification e-mail in your inbox. The solution uses the e-mail address that was configured in SAP Cloud for Customer.

After you are provisioned, you can perform other administrative tasks, such as provisioning other users, creating new organizations or profiles, or configuring settings for SAP Cloud for Customer, server-side integration for groupware.

Related Information

Manage Organizations [page 1001]
Manage Profiles [page 994]

23.5.1.1.1 How SAP Cloud for Customer, Server-Side Integration for Groupware Reacts When a User Role Changes

Since the SAP solution allows the user roles to be changed, an administrator can become an ordinary user or vice versa.

When such a change in roles occurs, SAP Cloud for Customer, server-side integration for groupware adapts to the situation – when a user logs on to SAP Cloud for Customer, server-side integration for groupware, the user permissions are automatically adjusted based on the new user's role in the SAP solution.

Note that no notification appears in this case.

23.5.1.2 Manage Profiles

A profile is a collection of configuration settings and parameters. When administrators provision users, a profile is assigned to each user. To be provisioned, users must be assigned to a profile.

A profile specifies the following:

- Filtering rules for objects and records
- Restrictions for business actions
- Custom read-only fields to be displayed for the records of various types (smart descriptions)
- Customization of the Microsoft Outlook add-in or Gmail add-in
- Configuration of reminders
- Rules for sharing e-mail messages

To see a list of available profiles, log on to the HTLML5 client as an administrator and choose ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Profiles* ▶.

> i Note
>
> Server-side integration uses OData V2 APIs for synchronization. For add-in, server-side integration uses OData V1 APIs.

23.5.1.2.1 Types of Profiles

Administrators can create profiles, which are collections of configuration settings and parameters. During provisioning, administrators must assign users to profiles.

Profile Types

Profile	Description
Default profile template	After provisioning, users are automatically assigned a default profile template. This profile contains the default configuration for SAP Cloud for Customer, server-side integration for groupware. The default profile template is provided by the Professional Services team and cannot be edited by an administrator or an ordinary user. However, the default profile template can be used for creating other profile templates.
Profile template	Profile that can be created and edited by administrators. The profile template can either be created from a default profile template or from scratch, and it can be assigned to either ordinary users or administrators. Ordinary users cannot edit profile templates, but they can switch between available profiles using the dashboard in SAP Cloud for Customer, server-side integration for groupware. A profile template can also be specified instead of the default profile when administrators create new organizations.
Customized profile	If an ordinary user changes the settings that are defined by the selected profile template (for example, changes the synchronization settings on the dashboard), this profile template becomes a customized profile. The customized profile is only effective for the user who created it, but such a profile can be saved as a profile template by an administrator. When converted to a profile template, it can be shared among other users.

23.5.1.2.2 Configure: Create a New Profile Template

Administrators can create new profile templates from either a default profile or from another profile template. Profile templates cannot be created from scratch.

Context

To see a list of available profiles, log on to the HTLML5 client as an administrator and choose ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Profiles* ◀.

To create a new profile template, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator and go to ▌▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Profiles* ❯.
2. Find the profile that you want to base your new profile on. You can use both the default profile template and user-created profile templates.

   To identify a default profile, look in the *Actions* column for a profile for which the trash icon is disabled (since the default profile cannot be deleted).
3. In the *Actions* column, click the copy icon.
4. On the screen that appears, enter the appropriate information.
5. Save your changes.

23.5.1.2.3 Configure Strict Search

Administrators can configure the search so that it only returns exact matches.

By default, the add-in adds wildcards (*) automatically before and after search terms that users enter. If you do not want the wildcards to be added automatically, use the strict search, which only returns exact matches.

> i Note
>
> Users may still add wildcards (*) manually.

Log on to the HTLML5 client as an administrator and go to ▌▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ and make the setting to use the strict search. The setting applies to all users and all searches.

23.5.1.2.4 Configure Synchronization Filters

SAP Cloud for Customer, server-side integration for groupware uses synchronization filters to determine which records to synchronize between the user's mailbox and SAP Cloud for Customer. Administrators can configure different filters for each record type.

Context

When you configure the profile's synchronization filters, for each record type, you can choose from the following options:

- *My Records*

Synchronizes records where the user is an owner. For contacts – synchronize records where the user is an owner of the associated account.

- *My Team's Records*
  Only applicable for contacts and accounts. For contacts – synchronizes records where the user or the members of the user's team are the owners of the associated account; for accounts – synchronizes records where the user or the members of the user's team are owners.
- *Favourite Contacts*
  Only synchronize the contacts marked as favourite.
- *Do Not Synchronize*

To configure synchronization filters, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator and go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Profiles* ❯ and open the profile that you want to edit.
2. On the *Sync Settings* tab, go to the card for the type or record you want to edit.
3. Under *Settings*, select the synchronization filter that you need.
4. Save your entries.

23.5.1.2.5 Configure Restrictions

Administrators can restrict ordinary users from performing certain actions. These restrictions can be set for individual record types and can apply to both the SAP Cloud for Customer, server-side integration for groupware and synchronization settings.

Context

> i Note
>
> An ordinary user is not allowed to change restrictions even in the context of a customized profile.

To set restrictions, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Profiles* ❯, and open the profile that you want to edit.

2. On the *Sync Settings* tab, go to the card for the type or record you want to edit.

3. Under *Settings*, set the restrictions that you need.

   For more information about each restriction, choose the information ("i") button near the restriction.

   > **i Note**
   >
   > Setting Restrictions for Individual Customers
   >
   > By default, individual customers are not synchronized with the user's mailbox. However, it is possible to enable synchronization for the records of this type by using the *Synchronize Individual Customers* restriction. If you select this restriction, users can share individual customers via the *Individual Customers* folder that is added to the user's mailbox.

   > **i Note**
   >
   > Setting Restrictions for Attachments
   >
   > For attachments, you can specify the file name extensions that you want to allow or block. To do so, under ▮ *Sync Settings* ❯ *General Sync Settings* ❯, in the *Allowed File Extensions for Attachments* or *Prohibited File Extensions for Attachments* box, either select the extensions from a list or type a list of such extensions separated by commas or spaces. Note that, when you add extensions, the leading dot is optional. In other words, both .docx and docx are allowed.

23.5.1.2.6 Configure Smart Descriptions

Administrators can edit smart descriptions, which allow fields that are not mapped to native mail server fields to be displayed for the user.

Context

Depending on the type of a record, these fields are represented differently:

- For contacts, individual customers, and accounts, the values of the specified fields appear in the notes section.
- For tasks, field values appear in the body of the task.

> **i Note**
>
> A set of SAP Cloud for Customer fields that are available for selection is defined by the user's metainfo. Service fields are omitted.

To specify the fields that are to be shown as smart descriptions, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▐▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Profiles* ❯, and open the profile that you want to edit.
2. On the *Sync Settings* tab, go to the card for the type or record you want to edit.
3. Under *Smart Description*, choose *Add Smart Description Field*.
4. Select a field that you want to display from the list.

   You can add as many fields as you need by repeating the last two steps.

Results

If, for some reason, the content of the fields specified as smart descriptions cannot be displayed, these fields are omitted. For example, if the user does not have permission to view the content, the field does not appear.

23.5.1.2.7 Configure: Apply Profile Changes to All Users

Administrators can apply any profile changes they make to all users, even if the profile is already in use.

To push a profile change to all users at once, log on to the HTML client as an administrator and go to ▐▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Organizations* ❯. Open an organization, choose the profile you want to apply, and choose ▐▶ *Settings* ❯ *Save and Apply Profile for All Users* ❯.

23.5.1.3 Manage Organizations

To make user management easier, administrators can divide users into groups called organizations. An organization can be configured to provide its users with specific common configuration.

When a new user is provisioned, administrators must assign the new user to an organization, either default or newly created; otherwise, the user cannot be provisioned. Unprovisioned users are not assigned to any organization.

Users in the same organization share common, organization-specific synchronization settings. By adding users to or removing them from the organization, an administrator can manage which configurations are used by which users.

When a new SAP Cloud for Customer tenant is provisioned to SAP Cloud for Customer, server-side integration for groupware, a new default organization is created. This default organization cannot be deleted; however, administrators can edit its name and settings.

A new or default organization is also assigned a template profile (a collection of specific configuration settings and parameters), which administrators can change later. This template profile is automatically applied to all users in the organization.

At the level of organization, you can define the following settings for its users:

- Type of the mailbox access
- Synchronization status (enabled or disabled)
- Profile with the specific configuration for SAP Cloud for Customer, server-side integration for groupware

You can view a list of organizations by logging on to the HTLML5 client as an administrator and choosing ▌ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Organizations* ▐.

You can show or hide columns in the list by using the ☰ *hamburger icon*.

Related Information

Configure: Delete (Unprovision) Users [page 1010]
Configure: Assign Users to Other Organizations [page 1014]

23.5.1.3.1 Configure How Gmail Users in an Organization Access Their Mailboxes

At the organization level, administrators can control how users access their mailboxes.

Context

When a new organization is created, specify the type of mailbox access to be used for the organization's users. When the access type is selected and configured, it is applied to all users in the organization. Users can only use the defined access type to access their mailboxes.

Gmail users must use the *Google Direct Logon*. If the users in the organization access their Gmail inboxes directly, specify the direct logon access type for the organization.

As an administrator, you can change the mailbox access type at any time. To change the mailbox access type for the organization, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▌ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Organizations* ▐, and open an organization.

2. On the *E-Mail Configuration* tab, select the required mailbox access type.

   Configure the access type by entering appropriate information in the fields that appear.
3. Save your changes.

Results

> ⚠ Caution
>
> If the change of the mailbox access type is not accompanied by corresponding changes in the organization users' settings, it may affect the ability of those users to access their mailboxes.

23.5.1.3.2 Configure: Create a New Organization

Organizations allow administrators to streamline user setup.

Context

To create a new organization, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Organizations* ❯, and click *New*.
2. Enter the appropriate information in the fields that appear.
   - Profile
     Specify the profile that is assigned to the users in the organization by default.
   - Mailbox access type
     Select how the users in the organization access their mailboxes and then specify the required parameters.
3. Save your entries.

Results

You can add provisioned users to this organization.

Related Information

23.5.1.3.3 Configure: Assign Profiles to Organizations

All organizations must be associated with a profile template. The profile template is assigned automatically to all users in this organization. As an administrator, when you create a new organization, you must specify the profile template that the system uses by default.

Context

Administrators can change the default profile template to any other profile after the organization is created; however, if that profile gets deleted or renamed, the organization reverts automatically to the profile that was specified as default.

To assign the organization a new profile, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Organizations* ◀, open the organization for which you want to assign a new profile.
2. Select the new profile.
3. Save your changes.

23.5.1.3.4 View Organization Statistics

Administrators can view statistics about the last synchronization session for each user in the organization.

Context

To view user statistics, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Organizations* ❙, open the organization for which you want to view statistics.
2. To see a list of user statistics, go to the *Statistics* tab .
3. To see more details, under *Actions*, choose the icon to open the job.
4. To download a session-related log, under *Actions*, choose the icon to download the log.

   You can show or hide columns in the list by using the ☰ icon.

23.5.1.3.5 View Organization Related Activity History

Administrators can view activities related to the current organization.

Context

Activities related to the current organization can be of the following types:

- The organization was added
- Synchronization was enabled
- Synchronization was disabled

For each activity, you can see the following information:

- Date and time when the activity occurred
- E-mail address of the user that initiated the activity
- Activity type

To view a list of activities, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❭ *Groupware Settings* ❭ *Organizations* ❭, and open the organization for which you want to view activities.
2. Go to the *Activities* tab.
3. To download a session-related log, under *Actions*, choose the icon to download the log.

23.5.1.3.6 Configure: Delete an Organization

Administrators can delete an organization only if all users in this organization are reset. Once the organization is deleted, all users in the organizations are deleted too.

Context

> **i Note**
>
> The default organization cannot be deleted.

To delete an organization, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❭ *Groupware Settings* ❭ *Organizations* ❭, and open the organization that you want to delete.
2. Ensure that the synchronization is disabled for all users in the organization.
3. Choose ▶ *Settings* ❭ *Delete* ❭.

> **i Note**
>
> If a user in the organization cannot be reset (for example, SAP Cloud for Customer, server-side integration for groupware can no longer access the user's mailbox), but you still must delete the organization, you can force deletion of the user without resetting it. Note that any changes that were made by SAP Cloud for Customer, server-side integration for groupware to the user's mailbox (such as adding extra folders) are not removed.
>
> To force the deletion of an organization that contains users that could not be reset, on the *Organizations* tab, open the organization that you want to force-delete and choose ▶ *Settings* ❭ *Force Delete* ❭

23.5.1.4 Provision Users

As an administrator, you must create users in SAP Cloud for Customer and provision them to SAP Cloud for Customer, server-side integration for groupware. At that point, users can access and use SAP Cloud for Customer, server-side integration for groupware.

23.5.1.4.1 Configure – Provision Users for Gmail

Provisioning is the process for administrators to create and activate users, and manage user access to SAP Cloud for Customer, server-side integration for groupware. Provisioning also starts the synchronization between the e-mail inbox and the SAP solution for provisioned users.

Context

> **i Note**
>
> You must have active profiles and active organizations in the system before you start profiling users.

> **→ Recommendation**
>
> Using the same e-mail address across different tenants and for both testing and productive use may cause problems.
>
> We recommend using different e-mail addresses for:
> *   Testing
> *   Productive use
> *   Each tenant

Provisioning of users can only be performed by an administrator in SAP Cloud for Customer, server-side integration for groupware, who belongs to an SAP Cloud for Customer tenant and has administrative rights. Administrators are provisioned automatically the first time they access the *Groupware Settings* tab.

To see a list of users that can be provisioned, log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Provisioning* ▶.

You can show or hide columns in the list by using the ☰ icon.

To provision a user, do the following:

Procedure

1. Choose ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Provisioning* ▶.

2. Click the plus sign at the far right for the user you want to provision.

   You can filter users by business role and provision the entire list at the same time.

   You can also provision several users at once by selecting them with the check mark to the left of their names and choosing *Activate Selected*.

3. On the next screen, the default organization is selected. Check and change it as necessary.

4. Specify the profile that is assigned to all users in the organization by default.

5. (Optional) Select the checkbox to send a welcome e-mail to the user.

   An e-mail with instructions on how to proceed with SAP Cloud for Customer, server-side integration for Gmail is sent to the user following provisioning.

6. Click *Provision*.

Results

When an administrator provisions another user, the following happens:

- This user is added to the organization, either default or specified.
- This user is assigned the template profile, either default or specified.
- Optionally, a welcome e-mail is sent to the user with instructions on how to complete registration in SAP Cloud for Customer, server-side integration for groupware.

  > i Note
  >
  > If an administrator provisions a user without this user receiving a welcome e-mail, then the administrator must be aware that the provisioned user is not informed of this action and cannot receive instructions on how to proceed with or configure SAP Cloud for Customer, server-side integration for groupware.

The SAP Cloud for Customer, server-side integration for Gmail is installed automatically for provisioned users after they successfully sign in to the Gmail server.

Otherwise, a provisioned user must either follow instructions in the welcome e-mail, or an administrator must manually configure SAP Cloud for Customer, server-side integration for groupware for that user.

Related Information

23.5.1.4.2 Configure: Delete (Unprovision) Users

As an administrator, when you delete a user, it means that this user can no longer use SAP Cloud for Customer, server-side integration for groupware and synchronize data. In other words, a deleted user becomes an unprovisioned user. Such users appear on the *Provisioning* tab, and, if required, can be provisioned again.

Context

> ⚠ Caution
>
> If an SAP Cloud for Customer user is deactivated or deleted, the corresponding SAP Cloud for Customer, server-side integration for groupware user still remains active and billable. For such user to be completely unprovisioned and deleted from SAP Cloud for Customer, server-side integration for groupware, he or she must be explicitly deleted by an administrator.

To delete a user, do the following:

Procedure

1. Reset the user's mailbox.

   > i Note
   >
   > If for some reason, a user cannot be reset (for example, SAP Cloud for Customer, server-side integration for groupware can no longer access the user's mailbox), but you still must delete the user, you can force the deletion of the user without resetting it. Note that any changes that were made by SAP Cloud for Customer, server-side integration for groupware to the user's mailbox (such as adding additional folders) are not removed.
   >
   > To force the deletion of a user, log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Users* ❱, open the user that you want to force-delete and choose ▶ *Settings* ❯ *Force Delete* ❱.

2. Log on as an administrator to SAP Cloud for Customer HTML client, go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Users* ❱, and do one of the following:

   ○ On the *Users* tab, under *Actions*, choose the appropriate icon.

   ○ On the *Users* tab, open the user that you want to delete and choose ▶ *Settings* ❯ *Delete* ❱.

Related Information

[Configure: Reset Mailboxes and Disable Synchronization [page 1015]](#)

23.5.1.5 Manage Provisioned Users

As an administrator, after you provision users to SAP Cloud for Customer, server-side integration for groupware, you can manage various user-related settings like disabling synchronization for users or assigning them to another organization. You can also delete provisioned users, transitioning them back to an unprovisioned state and preventing them from using SAP Cloud for Customer, server-side integration for groupware.

You can show or hide columns in the list by using the ≡ icon.

> **i Note**
>
> On the *Users* tab, users for whom the mailbox is initialized appear in bold font.

Related Information

23.5.1.5.1 Configure the Synchronization Status of Users

Administrators can enable or suspend synchronization for individual users.

By default, synchronization is disabled for a newly provisioned user until that user completes an initial configuration for SAP Cloud for Customer, server-side integration for groupware, using the welcome wizard. In the list on the *Users* tab, the users for which synchronization is enabled are shown in black, while the users for which it is suspended are shown in red.

> **i Note**
>
> Synchronization may also be disabled automatically due to errors.

To change synchronization for a user, on the *Users* tab, under *Actions*, choose the synchronization icon.

You can change the synchronization status for several users at the same time by selecting them, choosing *Settings*, and clicking *Enable Synchronization* or *Disable Synchronization*.

There can be differences between the organization's synchronization status and an individual user's synchronization status. SAP Cloud for Customer, server-side integration for groupware compares these statuses when determining the effective status. The organization's status always overrides the individual user's status except when synchronization is disabled for the user that belongs to the organization for which the synchronization is enabled – in this situation, the user's status overrides the organization's status.

23.5.1.5.2 Configure: Force Synchronization

By default, SAP Cloud for Customer, server-side integration for groupware automatically synchronizes data every 30 minutes, but administrators can synchronize manually at any time. You cannot force synchronization more than once per minute.

Context

To force synchronization for a user, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, and go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Users* ❯.
2. Under *Actions*, choose the appropriate icon.

   You can force synchronization for several users at the same time by selecting them, choosing *Settings*, and clicking *Force Sync*.

23.5.1.5.3 Configure Which Visits to Synchronize

In SAP Cloud for Customer, when associated with visits, users can be either visit organizers or visit owners. As an administrator, you must configure which visits are synchronized for users.

Context

You can define which visits must be synchronized for the user – where the user is an owner or organizer – as follows:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Settings* ❯.
2. In the *Sync Visit To* field, select whether you want to sync visits to the owner or the organizer.

23.5.1.5.4 Configure: Assign Other Profiles for Users

During the provisioning process, as the administrator, you assign users to a template profile (either specified or default for the organization). After provisioning, you can change the profile that is assigned to the user.

Context

To change the template profile assigned to a user, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❭ *Groupware Settings* ❭ *Users* ❭, and open the user for whom you want to change a profile.
2. In the *Profile* field, select the profile that you want for this user.

   To go to the selected profile, click *Navigate*. You can also customize the selected profile by clicking *Customize*.
3. Save your entries.

Related Information

Manage Profiles [page 994]

23.5.1.5.5 Configure: Assign Users to Other Organizations

As an administrator, you can specify the organization each user is assigned to during the provisioning process. Otherwise, users are automatically assigned to the default organization. After provisioning, you can change the organization to which users are assigned.

Context

> **i** Note
>
> When assigning users to other organizations, be aware that the new organization may use different mailbox access types or Microsoft Exchange Server impersonation settings. As a result, it may affect the ability of SAP Cloud for Customer, server-side integration for groupware to access the user's mailbox.

To assign a user to another organization, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❭ *Groupware Settings* ❭ *Users* ❭, and open the user for whom you want to change an organization.
2. In the *Organization* field, select the organization that you want for this user.

   To go to the selected profile, click *Navigate*.
3. Save your entries.

23.5.1.5.6 Configure: Reinitialize Mailboxes

When an initial synchronization is started, SAP Cloud for Customer, server-side integration for groupware performs the initialization of the user's mailbox. It adds new folders and categories. However, if an error occurs that may affect the integrity of synchronized data, administrators may need to reinitialize the user's mailbox.

Context

> ⚠ Caution
>
> When reinitializing a user's mailbox, all previously synchronized data is removed from the mailbox. Therefore, make sure that the user has backed up his or her data before performing this operation.

To reinitialize a user's mailbox, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❭ *Groupware Settings* ❭ *Users* ❭, and open the user whose mailbox you want to re-initialize.
2. Choose ▶ *Settings* ❭ *Re-Initialize User's Mailbox* ❭.

Results

The mailbox will be re-initialized during the next synchronization session.

23.5.1.5.7 Configure: Reset Mailboxes and Disable Synchronization

Administrators can reset a user's mailbox and disable synchronization for that user. For example, this operation is required when preparing an organization for deletion, since the organization cannot be removed until all of its users are reset in this manner.

Context

To reset a user's mailbox, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Users* ❱, and open the user whose mailbox you want to reset.
2. Choose ▶ *Settings* ❯ *Reset Mailbox* ❱.

> **i** Note
>
> If synchronization is re-enabled for the user, the user's mailbox is automatically initialized during the next synchronization session.

23.5.1.5.8 Check Mail Server Connection Status

For troubleshooting purposes, it is possible for administrators to verify a connection status between SAP Cloud for Customer, server-side integration for groupware and the user's mail server. If the connection is not available, the most likely cause is that the password has expired or some of the settings are not correct.

Context

To check connectivity between SAP Cloud for Customer, server-side integration for groupware and Microsoft Exchange or Gmail, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to 〉 *E-Mail Integration* 〉 *Groupware Settings* 〉 *Users* 〉, and open a user.
2. Choose 〉 *Settings* 〉 *Check Mailbox Connectivity* 〉.

23.5.1.5.9 Configure Auto-Sharing for Gmail

Administrators can set up auto-sharing for Gmail in their SAP solution.

Log on to your SAP solution as an administrator and go to 〉 *E-Mail Integration* 〉 *Groupware Settings* 〉 *Profiles* 〉 and select a profile. Under 〉 *Sync Settings* 〉 *E-Mail Sync Options* 〉, select the checkbox to enable auto-sharing.

23.5.1.5.10 View User Statistics

To find out more information about a user's synchronization sessions, administrators can view user statistics.

Context

To view user statistics, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Users* ❯, and open the user whose statistics you want to see.

    A list of synchronization sessions appears in the list on the *Statistics* tab.

2. To see more details, under *Actions*, choose the icon to open the job.

    A session description and details open in a new page.

3. To download a session-related log, under *Actions*, choose the icon to download the log.

    You can show or hide columns in the list by using the ☰ icon.

23.5.1.5.11 View User-Related Activity History

As an administrator, you can view activities related to any user.

Context

For each activity, you can see the following information:

- Date and time when the activity occurred
- An e-mail address of the user that initiated the activity
- Type of the activity

To view a user's activities, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Users* ❯, and open the user whose activities you want to see.

2. Go to the *Activity* tab.

   A session description and details open in a new page.

3. To download an activity-related log, under *Actions*, choose the appropriate icon.

23.5.1.6 Customize SAP Cloud for Customer, Server-Side Integration for Groupware

As an administrator, you can customize the default appearance and behavior of the SAP Cloud for Customer, server-side integration for groupware.

You can customize:

- Which record types to show or hide in SAP Cloud for Customer, server-side integration for Microsoft Outlook or SAP Cloud for Customer, server-side integration for Gmail
- Which fields to show in both the record card (basic view) or in the detailed record view
- The sort order for record cards
- Criteria to use for searching the records
- How data should be retrieved for opened e-mails or events and how e-mail tracking should behave

23.5.1.6.1 Configure Record Types

Administrators can customize the fields that are available for all record types.

Context

Your company may not need to track certain information, or may use different terms than the terms in the add-in. You can customize each record type to fit your company's needs.

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▌ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Profiles* ◢ , and open the profile that you want to edit.
2. Under *Add-In Settings*, choose the record types that you want to appear in the add-in.

   As you select record types, their record cards appear in the *Add-In Settings* tab, where you can further customize them.

23.5.1.6.2 Configure General Settings for Record Types

Administrators can configure fields for sorting and searching for each record type.

Context

To configure general settings for a record type, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Profiles* ❯ *Add-In Settings* ▮, on the record type you want to edit, choose *Settings*.
2. Configure the following settings:
   - Under *Sort By*, select the fields by which the record cards are sorted by when they appear in the main add-in window or in search results.
   - Under *Search By*, specify one or more fields to search by when users run a search.

23.5.1.6.3 Configure the Basic View

Administrators can define up to four fields to show in the basic view of each record type.

Context

To select which record fields to show in the record card, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Profiles* ❯ *Add-In Settings* ▮, and on the record type you want to edit, choose *Basic View*.
2. In the *Fields in Basic View* list, select the field to show.

   Up to four fields can be shown at a time.

23.5.1.6.4 Configure the Detailed View

Administrators can define which fields to show and hide in the details view for records.

Context

To select which record field to show in the detailed view, do the following:

Procedure

1. Log on to the HTLML5 client as an administrator, go to ▎▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Profiles* ❯ *Add-In Settings* ▎, and on the record type you want to edit, choose *Detailed View*.
2. Choose *Add field to detailed view* and select a field to add.
   You can add as many fields as you need.

23.5.1.6.5 Configure Reminders

Since SAP Cloud for Customer does not support reminders, SAP Cloud for Customer, server-side integration for groupware allows administrators to set a default reminder time for tasks, appointments, and visits retrieved from SAP Cloud for Customer.

Context

To set the default reminder time, do the following:

Procedure

1. Log on to your SAP solution as an administrator, go to ▎▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Profiles* ▎, and open the profile that you want to edit.
2. Under ▎▶ *Sync Settings* ❯ *General Sync Settings* ▎, for tasks, appointments, or visits, set the reminder time in the *Remind About...* fields. If you want to disable a reminder, choose *Reminder is OFF*.

23.5.1.7 Main Concepts

A list of the main concepts the administrator should be familiar with when managing SAP Cloud for Customer, server-side integration for groupware for Microsoft Outlook or Gmail.

23.5.1.7.1 Main Concepts

Main concepts for administrators

Main Concepts for SAP Cloud for Customer, server-side integration for groupware

Term	Description
SAP Cloud for Customer - Administrator	A user that belongs to an SAP Cloud for Customer tenant and has administrative rights. Only an administrator can access the *Groupware Settings* tab and manage other administrators or ordinary users of SAP Cloud for Customer, server-side integration for Microsoft Outlook or SAP Cloud for Customer, server-side integration for Gmail.
SAP Cloud for Customer - User	A user in an SAP Cloud for Customer tenant that does not have administrative rights. A user has no access to the *Groupware Settings* tab and cannot manage other users.
profile	A collection of configuration settings and parameters that control how SAP Cloud for Customer, server-side integration for Microsoft Outlook or SAP Cloud for Customer, server-side integration for Gmail behaves for a specific set of users to better fit their needs.
profile template	A profile that serves as a template for a user. A profile template provides some predefined configuration settings that can later be customized by a user. When a user changes settings in the profile template, such profile template becomes a customized profile.
default profile template	A profile that provides users with the default SAP Cloud for Customer, server-side integration for Microsoft Outlook or SAP Cloud for Customer, server-side integration for Gmail configuration. A default profile template is created automatically and cannot be edited. It can also be used as a basis for creating new or customized profiles.
customized profile	A profile that is created automatically as soon as the user changes any settings in the profile assigned to that user. Both administrators and users can edit their profiles, thus creating customized profiles. Customized profiles do not appear in the list of profiles and cannot be assigned to other users. Customized profiles can only be used by the user who created them.

Term	Description
organization	A collection of users that share a common set of general settings. The name of the organization together with the organization settings can be changed by an administrator.
default organization	An organization that the administrator is automatically assigned to during the provisioning process. For ordinary users, a default organization is used if no other organization is explicitly specified by the administrator. The default organization cannot be deleted, but both the organization name and the organization settings can be changed by an administrator.

23.5.2 Set Up SAP Cloud for Customer, Server-Side Integration for Gmail

SAP Cloud for Customer, server-side integration for Gmail allows you to exchange information between Google applications and SAP Cloud for Customer. To use this feature, you'll need to complete a couple one-time setup steps.

> → Tip
>
> If you try to complete these steps, but you see any of the following, it means that your system administrator has already added the extension to Gmail and enabled it:
>
> * You log on to Gmail and see the sidebar.
> * You try to complete these steps, but the fields are grayed out.
>
> In either of these cases, you still need to synchronize your SAP data with Google and configure the Google Chrome extension.

23.5.2.1 Synchronize SAP Data with Google

To synchronize data from your SAP solution with your Google applications, define the URL for your SAP solution.

Procedure

1. Log on to the HTLML5 client of your SAP solution and go to ▌ *E-Mail Integration* ❯ *User Settings* ❯ *Sync Settings* ❯ *E-Mail Configuration* ❯ *Change* ▌.
2. Choose *Google*.
3. In the window that appears, log on to your Google account and allow access.

Results

Your SAP solution is linked to your Gmail applications. E-mails, appointments, contacts, and tasks from your SAP solution appear in your Gmail applications.

23.5.2.2 Use Filters to Define Objects to Synchronize

Filters from your SAP solution appear in the synchronization settings for accounts, individual customers, as well as contacts.

When you set up synchronization for accounts, individual customers, and contacts under ▶ *E-mail Integration* ❭ *User Settings* ❭ *Sync Settings* ❭ *Detailed Settings* ❭ *Customize* ❭, the filters that appear include filters from your SAP solution. You can see filters that your administrator created as well as any filters that you defined in personalization. You can use these filters to define which objects to synchronize.

23.5.2.3 Add the Extension to Google Chrome

If you want to use the sidebar as a window into your SAP solution, add the extension to Google Chrome.

Procedure

1. Add the extension to your Google Chrome browser in one of the following ways:
   - From your SAP solution
     1. Open your SAP solution in Google Chrome.
     2. Log on to the HTLML5 client of your SAP solution and under ▶ *E-Mail Integration* ❭ *User Settings* ❭, install the extension.
        The Google Chrome Web Store opens to the correct extension.
     3. Add the extension.
   - Manually
     In a Google Chrome browser, go to the Google Chrome Web Store, search for "SAP Cloud for Customer for Gmail," and add it to Google Chrome.

2. In your Chrome browser, choose ⋮ ▶ ❭ *More tools* ❭ *Extensions* ❭.
3. Enable the extension that you just added.

23.5.2.4 Configure the Google Chrome Extension

To use the Google Chrome extension for SAP Cloud for Customer, server-side integration for Gmail, each user must map the extension to the SAP solution. To do so, just define the URL in the extension the first time you use it.

Procedure

Define the URL for your SAP solution in one of the following ways:

- From your SAP solution
    1. Go to ▶ *E-Mail Integration* ❭ *User Settings* ❭ *Sync Settings* ❭ *Detailed Settings* ❭. In the install section, copy the URL for your SAP solution.
    2. In your Google Chrome browser, choose ⬛.
    3. In the dialog box that appears, copy and paste the URL of your SAP Cloud for Customer solution.
    4. Choose *Apply*.
- Manually
    1. If your administrator provided you with the URL for your SAP solution, copy it.
       If you are unsure about the URL of your SAP solution, check with your administrator or copy it from your SAP solution, as outlined in the first option.
    2. In your Google Chrome browser, choose ⬛.
    3. In the dialog box that appears, copy and paste the URL of your SAP Cloud for Customer solution.
    4. Choose *Apply*.

Results

You can log on to SAP Cloud for Customer, server-side integration for Gmail and use the sidebar in your Google accounts.

23.5.2.5 Configure Mass Rollout of Profile Changes

Administrators can apply profile updates to all users quickly and at the same time.

Context

As an administrator, when you change a profile that is the default profile for an organization, you can apply the profile changes to all users in that organization.

Procedure

1. Log on to your SAP solution as an administrator and make the profile changes in the default profile for an organization.

2. Go to ▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Organizations* ◀.

3. Select the organization and the updated profile and choose ▶ *Settings (⚙)* ❯ *Save and Apply Profile for All Users* ◀.

Results

The profile changes that you made are reflected for all users of the organization that you selected.

23.5.2.6 Stages of Migration to OData V2

SAP plans to encourage and then enforce users to switch to Open Data Protocol, version 2 (OData V2).

OData API V2 offers improved performance and an expanded set of main business objects and collections (data points).

We want to ensure that all our users have migrated to OData V2 by August 2020. We've scheduled the following steps toward this goal:

Encourage Mode

Activated first week of June 2020 in the production system through 14 July 2020.

- Users can still use the server-side add-in, but error messages appear encouraging them to contact their administrator to make the switch to OData V2.
- For administrators, on the *Profile* and *Users* tabs, columns appear that show the OData status (V1 or V2) for the add-in and sync. Any rows that aren't yet in V2 appear in red.

Enforce Mode

Activated 15 July 2020 in the production system.

- Users can't use the SAP solution. Error messages appear, explaining why the service isn't accessible.
- For administrators, on the *Profile* and *Users* tab, columns appear that show the OData status (V1 or V2) for the add-in and sync. Any rows that aren't yet in V2 appear in red.

Extensions

If you have concerns with this process or schedule, please raise an incident with detailed information and reasons for your extension request.

> **i Note**
>
> Extensions are only available until the August 2020 release upgrade.

Related Information

23.5.2.7 Configure: Switch to OData V2

Administrators must switch all profiles in their organizations to Open Data Protocol, version 2 (OData V2).

Context

OData API V2 offers improved performance and an expanded set of main business objects and collections (data points).

> **i Note**
>
> The last date to switch to OData V2 is 15 July 2020.Administrators can view the OData status (V1 or V2) for the add-in and sync on the *Profile* and *Users* tab. Any rows that are not switched to V2 appear red.

Switch each profile to OData V2 data manually.

> **→ Recommendation**
>
> When you have switched add-in settings or sync settings in a profile to OData V2, it's only possible to go back to OData V1 with assistance from support.
>
> Before switching all profiles to OData V2, we suggest that administrators:
>
> 1. Copy one profile to create a new one and convert it to OData V2.
>   After the conversion is done, delete the original profile.
> 2. Review conversion notes and address and then dismiss them.
> 3. Apply the profile only to yourself and verify that it works correctly.
> 4. Apply the profile to other users who had it previously.

Procedure

1. Log on to your SAP solution as an administrator and go to ▎▶ *E-Mail Integration* ❯ *Groupware Settings* ❯ *Profiles* ◀▎.

2. Open the profile that you want to switch to OData V2.

3. Under ▎▶ *Sync Settings* ❯ *OData API V2* ◀▎, toggle the switch on.

4. Under ▎▶ *Add-In Settings* ❯ *OData API V2* ◀▎, toggle the switch on.

5. Save your changes.

   If you have tested OData V2 change as outlined in the note, save your changes and apply them to all users in the profile.

6. Repeat these steps for each profile in your organization.

Related Information

Stages of Migration to OData V2 [page 1031]

23.5.3 Get Started

With SAP Cloud for Customer, server-side integration for Gmail, you can see and use information from your SAP solution right from your inbox.

If your company uses Gmail, this add-in could be just what you're looking for!

When you map your SAP solution to Google, all your SAP appointments, contacts, and accounts are synchronized with Google. If you use the sidebar, you can also get business insights and create many types of SAP items right from your Gmail inbox. Additionally, the sidebar allows you to save e-mails and appointments to many SAP Cloud for Customer items without leaving your inbox.

Related Information

Set Up SAP Cloud for Customer, Server-Side Integration for Gmail [page 1080]

23.5.3.1 Log On to SAP Cloud for Customer from Gmail

Log on to see and use the Gmail features.

Procedure

1. In the Google Chrome browser, log on to your Gmail account.
2. If you've entered your company-specific URL for SAP Cloud for Customer in the setup steps, the sidebar appears on the right side of your browser.

   In the following cases, you may need a few more clicks to see the sidebar:

   ○ If you do not see the sidebar at all, in your Google Chrome browser, choose and check that you defined the SAP tenant. If not, repeat the step to configure the Google Chrome extension.
   ○ If the sidebar appears but requires further action from you, such as granting access to your Google account, follow the instructions provided on the screen to grant access.

   > i Note
   >
   > As a security measure, the sidebar requires you to grant access periodically. It's the equivalent of confirming your logon information periodically for a bank or other secured site.

Results

Your appointments, tasks, contacts, and formatted or unformatted e-mail from SAP Cloud for Customer are synchronized. They appear in the Google applications.

Any images in the body of e-mails appear as attachments in your SAP solution.

If you are using the sidebar, when you click an e-mail in your inbox, the extension searches in your SAP solution and displays any existing information about the sender.

Related Information

Configure the Google Chrome Extension [page 1082]

23.5.3.2 Add or Remove Items from Synchronization

When you set up your SAP Cloud for Customer, server-side integration for Gmail, all e-mails, appointments, contacts, and tasks were synchronized with Google. Afterwards, the synchronization takes place periodically. You can add new items to the synchronization or remove items from synchronization.

Context
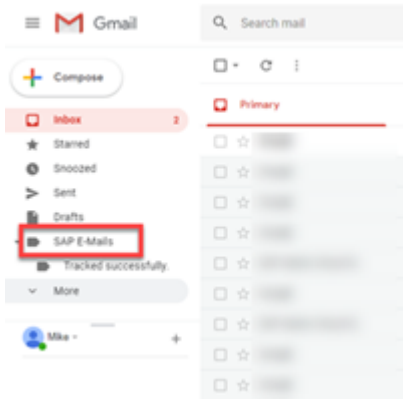
Add or remove items from synchronization with Google by adding or removing those items from the following predelivered SAP folders, categories, or calendars in Google.

For calendar events, all future appointments and visits are synchronized. For visits or appointments in the past, only those from the past 30 days are synchronized to the SAP solution. Appointments and visits that don't fall within this range still appear in your calendar, but are skipped during synchronization.

> **i Note**
>
> You can synchronize any meeting with your SAP solution, even if you aren't the organizer or owner. Meeting requests that you receive in your inbox are synchronized in one direction only: from Gmail to your SAP solution.

SAP Folders, Calendars, and Categories in Google

Google Application	SAP Folder, Calendar, or Category
Gmail	

Google Application	SAP Folder, Calendar, or Category
Contacts	
Calendar	
Tasks	
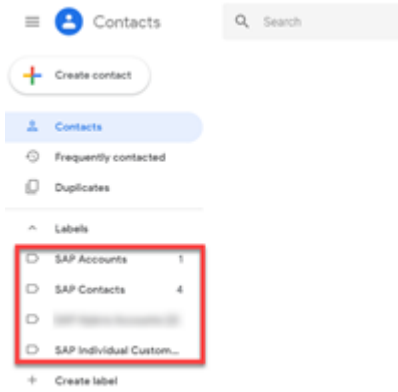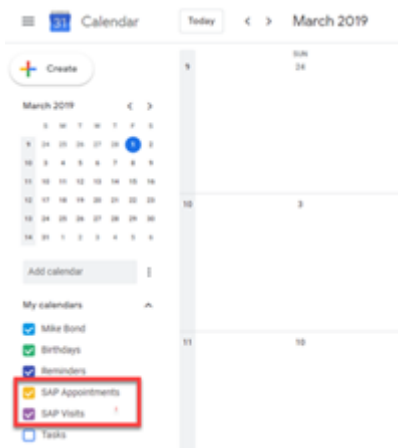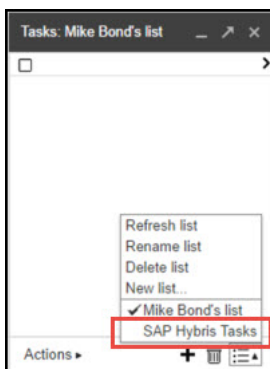
23.5.3.3 Create Appointments from Google Calendar in Gmail

You can use the updated Google Calendar view in SAP Cloud for Customer, server-side integration for Gmail.

Procedure

1. In the Google Calendar, select a time slot, and choose calendar type *SAP Cloud for Customer*.
2. Choose *More Options*.

    Add a title, guests, and other details.
3. Choose *Save and Send*.

23.5.3.4 Delete, Cancel, or Reassign a Meeting or Appointment

In both your SAP solution and your calendar (in Google or Microsoft Exchange), you can cancel or delete meetings, or reassign a meeting to another organizer.

Here's how the system responds:

> **i Note**
>
> When appointments are changed, attendees are notified automatically.

Your Actions and System Results

Your Action	Result
In your calendar, you remove an attendee of a meeting.	After synchronization, the attendee is also removed from the meeting in your SAP solution.
You're the organizer or owner of a meeting or appointment and you cancel it in your SAP solution.	After synchronization, the appointment is also canceled in your calendar.
In your SAP solution, you delete or cancel a meeting or reassign it to a new meeting owner.	At synchronization, the meeting is deleted from the calendar of the original organizer or owner.
In your SAP solution, you delete a meeting only (without canceling it or reassigning it to another owner).	At synchronization, the meeting is no longer shared, but it remains in the calendar of the original organizer or owner.

23.5.3.5 Associate Objects from the Google Calendar

You can associate appointments and visits with SAP Cloud for Customer, right from your Gmail calendar.

Procedure

1. In the Google calendar, open an SAP Cloud for Customer appointment.
2. In the side pane, search for an account, contact, or individual customer that contains objects with which you want to associate this appointment.
3. Click *Save Appointment or Visit*.

Results

The appointment or visit is associated with the object and business partner.

23.5.3.6 Auto-Sharing for Gmail

If you use Gmail and your administrator has made the required settings, your system automatically synchronizes e-mails. Your SAP solution automatically synchronizes any e-mail sent to or received from an e-mail address that is defined as a contact in your SAP solution.

> i Note
>
> Auto-sharing does not work retroactively. It is only valid for e-mails that are sent or received after your administrator has set up this feature.

23.5.3.7 Select Contacts Related to an Account

When you create an e-mail, appointment, visit, or task from your inbox, you can see contacts that are related to the account that you defined for the activity. Select the appropriate contacts to include in the activity.

If you want to add other contacts, click the header to see other filters from your SAP solution, such as *My Contacts* or *All Contacts*.

24 Sales Target Planning

Sales target planning enables you to carry out top-down sales planning from top-level managers to individual team members.

Sales targets are planned by top-level managers who are typically in charge of defining revenue goals across the company for the entire year. These targets are distributed to regional sales managers and further assigned across multiple time horizons and among sales representatives. To meet various needs from different functional roles, SAP Cloud for Customer offers full flexibility for your team to create target plans based on different dimensions. For example, sales directors can plan at territory or sales unit level while sales managers can plan based on product group, salesperson, or account.

The solution provides strong Microsoft Excel integration. Sales users can use native Microsoft Excel capabilities to perform necessary calculations, with minimum change management effort.

Sales managers and employees can also track their pipeline performance by comparing the estimated revenue with the sales target via reports, and monitor their progress in real time.

24.1 Scope and Configure Sales Target Planning

Administrators can configure sales target planning using scoping and fine-tuning activities.

24.1.1 Enable Sales Target Planning and Forecasting

Administrators must add sales planning and forecasting to the project scope to enable the features.

Prerequisites

Opportunity management must be scoped in before users can work with sales forecasting.

Procedure

1. Go to ▶ *Business Configuration* 〉 *Implementation Projects* 〉. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Sales* 〉 *Sales Planning and Forecasting* 〉 and check the box next to the scoping item.

2. Assign these work centers and views to appropriate users or roles.

   ○ *Sales Target Planning*
   ○ *Forecasts*
   ○ *Forecast Administration*

   > **i Note**
   >
   > Sales representatives with access to the *Forecasts* work center can create forecasts only for their own use. Sales managers with access to the *Forecasts* work center can create forecasts for the sales units that they manage. Users with access to the *Forecast Administration* work center can create forecasts for any sales users.

Related Information

Create Business Roles and Assign Work Centers and Views

24.1.2 Configure Notifications for Assigned Target Plans

Administrators can activate system notifications to inform sales employees that a target has been assigned to them.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ▌. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Business Task Management for Sales Planning* ▌ to edit the notification task.

24.2 Create Target Plans

The sales manager can create a plan structure based on multiple dimensions such as sales region, salesperson, account, product, and territory.

Prerequisites

You must have access to the *Sales Target Planning* work center to create target plans.

> **→ Tip**
>
> If you are creating a target plan based on the dimensions already defined in an existing target plan, you can reuse the structure by copying the existing target plan.

Procedure

1. Go to the *Sales Target Planning* work center.
2. From actions above the list, click *New*.
3. Set general properties including *Sales Unit*, *Horizon From/To*, *Plan Name*, and *Plan Currency*, and click *Next*.

   > **i Note**
   >
   > You can create only one target plan for each combination of sales unit and time horizon. Overlapping periods for the same sales unit are not allowed. Additionally, you can create a target plan for only up to one year period. If you want to create a plan across a couple of years, you must create multiple target plans.
   >
   > As long as the sales plan remains *In Preparation*, you may change the currency when desired.
   >
   > If the direct manager has set a target for the given sales unit and horizon, the *Total Target for Sales Unit* field gets automatically populated. The current logged-in sales manager can further distribute the sales target downward to subordinates.

4. Select planning dimensions and determine the level of granularity on which the plan is created, and click *Next*.
   1. Activate dimensions that you want to include in your target plan structure.
   2. For each activated dimension, click *Edit* to add specific items.

   > **∴ Example**
   >
   > Let's say you want to create a multi-dimensional target plan based on employees and product categories. You first activate *Employee* and *Product Category* as dimensions and then add specific employees and product categories. Once the plan structure is finalized, you can further set targets for each employee associated with each specific product category using the SAP Cloud for Customer add-in for Microsoft Excel.

   > **→ Tip**
   >
   > For you to add accounts to a target plan more easily, your administrators can adapt the master layout in advanced search and include PDI or extension fields.

5. Manage plan versions, and click *Next*.

   For example, you can create an optimistic version and a pessimistic version.

6. (Optional) Copy target data from an existing plan and obtain a baseline to build upon, and click *Next*.
   1. Select plan horizon of the copy source.

      > **i Note**
      >
      > The source only considers target plans created for the same unit. In addition, the source and target plan horizon must be for the same period, yet years can be different. Planning dimensions must also be matched. If multiple source versions exist, the system copies the version that is active.

   2. Select the version of the target plan to which you want to copy the source data.

> ❖ Example
>
> You can copy last year's target data and increase it by 10% for this year's target.

7. Review your entries, and click *Next*.
8. Confirm your entries, and click *Finish*.

Next Steps

Under the *Confirmation* step, you can click *Open Plan in Excel* to download the target plan, and further maintain target details using the SAP Cloud for Customer add-in for Microsoft Excel.

Related Information

[Copy Target Plans [page 1095]](#)

24.2.1 Enable Sales Target Planning and Forecasting

Administrators must add sales planning and forecasting to the project scope to enable the features.

Prerequisites

Opportunity management must be scoped in before users can work with sales forecasting.

Procedure

1. Go to ▌ *Business Configuration* 〉 *Implementation Projects* ▌. Select your project and navigate to ▌ *Edit Project Scope* 〉 *Questions* 〉 *Sales* 〉 *Sales Planning and Forecasting* ▌ and check the box next to the scoping item.
2. Assign these work centers and views to appropriate users or roles.
   - *Sales Target Planning*
   - *Forecasts*
   - *Forecast Administration*

   > ℹ Note
   >
   > Sales representatives with access to the *Forecasts* work center can create forecasts only for their own use. Sales managers with access to the *Forecasts* work center can create forecasts for the

sales units that they manage. Users with access to the *Forecast Administration* work center can create forecasts for any sales users.

Related Information

Create Business Roles and Assign Work Centers and Views

24.3 Copy Target Plans

The sales manager can create a plan structure by copying an existing plan. This feature is helpful when the copy source and target plans are built upon the same dimensions.

Procedure

1. In the plan list, select the target plan that you want to copy.
2. From actions above the list, click *Copy*.

   A new target plan opens with source plan details pre-populated.
3. Proceed through steps and edit settings as required, just like how you create a target plan.

   > i Note
   >
   > The target data is not automatically copied when you use the *Copy* function from the list. If you also want to copy the target data from an existing plan, you must define the copy source in the step of *Copy Target Data*.

4. Review your entries and click *Finish*.

Related Information

Create Target Plans [page 1092]

24.4 Maintain Target Plans

Sales managers can define specific targets using the SAP Cloud for Customer add-in for Microsoft Excel. If needed, the plan structure can also be modified.

> The plan owner can set targets based on value in the desired currency, or on volume of the goods or services sold if the product is part of the dimensions.

> The plan owner can modify the structure of an existing target plan including its plan horizon, dimensions, and versions.

24.4.1 Edit Target Plan Data

The plan owner can set targets based on value in the desired currency, or on volume of the goods or services sold if the product is part of the dimensions.

Prerequisites

You must install the SAP Cloud for Customer add-in for Microsoft Excel. To install the add-in, from your profile menu, click ▌ *Download* ❯ *Add-In for Microsoft Excel* ▐, and run the .exe file.

> **i Note**
>
> You can create target plans as long as you have access to the *Sales Target Planning* work center. However, for you to edit plan data in the report, your administrators must assign the sales target planning report to the matching work center view.

Procedure

1. In the line of the target plan to be edited, click the workbook icon ( ) to download the plan data.

   > **i Note**
   >
   > If multiple versions exist, the system downloads the version that is active.

2. Open the downloaded workbook in Microsoft Excel.
3. Click *Enable Editing*.
4. Enter your SAP Cloud for Customer logon credentials.
5. Maintain sales target data based on dimensions predefined in the plan structure. The cell turns yellow in color, indicating that a change is made.

- If there is no historical target available in the plan, you must enter data from scratch.
- If a copy has been made from a previous target plan, you can build on top of existing data.

In addition to native Microsoft Excel functions, you can also use planning functions provided by SAP Cloud for Customer to perform calculations. In the header menu of the workbook, click ▶ *SAP Cloud for Customer* ❯ *Show / Hide* ❯ *Planning* ◢ and select either *Distribute Equally* or *Revaluate*.

> ⚙ Example
>
> Example of using the *Distribute Equally* function:
>
> The sales manager decides to enhance the total target to a specific number and alter sales targets for some sales employees. Then, the sales manager would like Microsoft Excel to perform the math. As a result, the remaining total target increase or decrease gets distributed based on proportion among the rest of the sales representatives.
>
> Example of using the *Revaluate* function:
>
> The sales manager wants to raise the total target by 10% for all sales employees. To achieve this goal, the sales manager must first select the total target cell, enter `10` in the *PERCENT* field, click *Run* and then let Microsoft Excel do the subsequent calculations. As a result, the target for each sales representative gets increased by 10%.

6. In the header menu of the workbook, click ▶ *SAP Cloud for Customer* ❯ *Upload Input* ◢.

   The button toggles back to *Refresh*, indicating changes are uploaded successfully.
7. Click *Refresh* to see the updated results.
8. Close Microsoft Excel.
9. Refresh your target plan in the system, and you can see the updated target data.

Related Information

[Assign a Report](#)

24.4.2 Edit Target Plan Structure

The plan owner can modify the structure of an existing target plan including its plan horizon, dimensions, and versions.

Prerequisites

If you want to change the horizon or dimensions of an existing target plan, the plan must be in the status *In Preparation*.

Procedure

1. In the plan list, select the target plan to be edited.

2. From actions above the list, click ⏩ *Edit* ⏵ *Plan Structure* ⏵.

3. Proceed through steps and edit available settings as required.

> ⚠ Caution
>
> When you deactivate a dimension, related data gets removed in all the plan versions. If you want to keep your existing data, you must save it to a local file before changing the dimensions.

4. Review your entries and click *Finish*.

24.5 Activate Target Plans

The plan owner must activate the target plan so that sales employees can see and further work with the targets assigned to them via reports.

Procedure

1. In the plan list, select the target plan that is ready for activation.

2. From actions above the list, click ⏩ *Change Status* ⏵ *Active* ⏵.

> → Tip
>
> Administrators can configure *Business Task Management for Sales Planning* so the employees can be notified when a target is assigned to them.

24.5.1 Configure Notifications for Assigned Target Plans

Administrators can activate system notifications to inform sales employees that a target has been assigned to them.

Go to ⏩ *Business Configuration* ⏵ *Implementation Projects* ⏵. Select your project and navigate to ⏩ *Open Activity List* ⏵ *Fine-Tune* ⏵ *Business Task Management for Sales Planning* ⏵ to edit the notification task.

24.6 Target Plan Reporting

Sales planning reports enable salespeople to monitor their pipeline performances against sales targets in real time. Reports are available under ▶ *Analysis* 〉 *Reports* 〉.

SAP Cloud for Customer offers several standard reports for sales planning. Here are some examples.

- *Sales Target vs. Pipeline*: It shows the comparison of targets with a progression based on opportunities for all employees.
- *My Progress: Sales Target/Pipeline for Employees*: You can view reports by month or by sales unit.
- *Our Progress: Sales Target/Pipeline for Managers*: You can view reports by month or by sales unit.

Your administrators also can utilize the target plan data source *CODTARGETPLANV* to create customized reports. The target plan data source can be joined with sales forecast data source and opportunity data sources to provide a complete view of sales performance.

Related Information

SAP Cloud for Customer Analytics Guide

25 Sales Forecasting

Sales forecasting is the process of estimating your future sales.

In SAP Cloud for Customer, the forecast is calculated based on the value of the opportunities to be closed or the products to be sold. When a deal looks very promising, the sales representative can publish this opportunity to forecast so that the value of the opportunities can be counted into the revenue estimate. When a forecast is submitted, the sales manger further evaluates its reliability and requests a revision if needed. On receiving forecasts from all the team members, the sales manager creates an aggregate forecast accordingly and submits it to the next level above.

To enhance forecast accuracy, we allow each forecast owner to bring in their subjective judgment, and they can override forecast figures at every level of the organizational hierarchy. In addition, the forecast owner can always send updated forecast versions to reflect any changes in relevant opportunities along the way.

Sales managers and employees can also track their forecast by comparing the estimated revenue with the sales target and pipeline performance via reports, and monitor their progress in real time.

25.1 Scope and Configure Sales Forecasting

Administrators can enable and configure sales forecasting using scoping, scoping questions, and fine-tuning activities.

25.1.1 Enable Sales Target Planning and Forecasting

Administrators must add sales planning and forecasting to the project scope to enable the features.

Prerequisites

Opportunity management must be scoped in before users can work with sales forecasting.

Procedure

1. Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Sales Planning and Forecasting* ▌ and check the box next to the scoping item.

2. Assign these work centers and views to appropriate users or roles.
   - ○ *Sales Target Planning*
   - ○ *Forecasts*
   - ○ *Forecast Administration*

   > **i** Note
   >
   > Sales representatives with access to the *Forecasts* work center can create forecasts only for their own use. Sales managers with access to the *Forecasts* work center can create forecasts for the sales units that they manage. Users with access to the *Forecast Administration* work center can create forecasts for any sales users.

Related Information

Create Business Roles and Assign Work Centers and Views

25.1.2 Configure Sales Forecast Category

Administrators can maintain categories that classify opportunities in sales forecasting and relevant pipeline reporting.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* ❙. Select your project and navigate to ▶ *Open Activity List* 〉 *Fine-Tune* 〉 *Sales Forecast Category* ❙ to edit your categories.

25.1.3 Configure Default Sales Forecast Level

Administrators can decide which forecast level is selected by default during forecast creation.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* ❙. Select your project and navigate to ▶ *Open Activity List* 〉 *Fine-Tune* 〉 *Sales Forecast Level* ❙ to select the default forecast level.

25.1.4 Configure Code List Restrictions for Forecasts

Administrators can restrict forecast level, source, and period that the forecast owner can choose from during forecast creation. It helps improve data consistency in forecast creation across users.

Procedure

1. Go to ▌▶ *Administrator* ❯ *General Settings* ❯ *Code Restrictions* ▌.
2. Click *New* to add a code list restriction.
3. For business object, choose *Sales Forecast*.
4. Select *Code to Restrict*.
5. Select a desired business role.

   > **i Note**
   >
   > You can create one code list restriction for each desired business role. If the field is left empty, the code list restriction applies to all users and you cannot create another code list restriction for this business object.

6. Click *Save and Open*.
7. Click *Edit* at the bottom right.
8. Deactivate values that are not necessary for the desired business role.
9. Click *Save*.

25.1.5 Configure Forecast Creation for Each Sales Unit Maintained

Administrators can enable users to create a forecast for only the sales unit that is maintained during forecast creation.

When a regular or aggregate forecast is created, the forecast by default includes applicable opportunities from all the sales unit assigned to the sales user. This configuration allows sales users to create forecasts for each sales unit that is assigned and obtain a more accurate view on the expected revenue.

Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Sales Planning and Forecasting* ❯ *Sales Forecasts* ▌ to find the corresponding question and enable forecasts to only include opportunities from the matching sales unit, as well as its subunits.

25.1.6 Configure Forecast Submission Notifications

Administrators can activate system notifications to inform the manager that a new forecast version is submitted.

Go to ▮▶ *Business Configuration* ❭ *Implementation Projects* ▮. Select your project and navigate to ▮▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Business Task Management for Sales Forecast* ❭ *Sales Forecast Submission Notification Settings* ▮ to edit the notification task.

25.1.7 Configure Forecast Revision Notifications

Administrators can activate system notifications to inform the forecast owner that a revision is requested.

Go to ▮▶ *Business Configuration* ❭ *Implementation Projects* ▮. Select your project and navigate to ▮▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Business Task Management for Sales Forecast* ❭ *Sales Forecast Revision Notification Settings* ▮ to edit the notification task.

25.1.8 Configure SAP Intelligent Sales Execution (Datahug) for Forecast Tracker

Administrators can add Datahug to your project scope and enable users to manage forecasts using Datahug's forecast tracker.

Prerequisites

> **i Note**
>
> To use Datahug, a separate license is required from SAP Intelligent Sales Execution.

Procedure

1. Go to ▮▶ *Business Configuration* ❭ *Implementation Projects* ▮. Select your project and navigate to ▮▶ *Edit Project Scope* ❭ *Questions* ❭ *Communication and Information Exchange* ❭ *Integration with External Applications and Solutions* ❭ *Integration Scenarios with Cloud Solutions from SAP* ▮ to find the corresponding question about enabling Datahug.

2. Go to ▮▶ *Administrator* ❭ *Sales and Campaign Settings* ❭ *Datahug Settings* ❭ *Open Datahug Administrator* ▮ and provide an API key and secret for accessing Datahug.

3. Assign the *Datahug* work center view (ID: *COD_DATAHUG_WCF*) to appropriate business users or roles.

   For more details, please check Create Business Roles and Assign Work Centers and Views.
4. Contact SAP Intelligent Sales Execution for further configurations.

   For more information, please check out Prepackaged Integration with SAP Intelligent Sales Execution (SAP Datahug).

25.1.9 Configure Depersonalization in Forecasts

The depersonalization function allows you to remove personal data from a business object to ensure compliance with the applicable data protection requirements.

Depersonalization is only available for users with access to the *Data Protection and Privacy* work center.

You can depersonalize a forecast in the *Forecast Administration* work center, and depersonalizing a forecast triggers a deletion. Once a forecast is depersonalized, you can go to ▶ *Administrators* ❭ *General Settings* ❭ *Data Management* ❭ *Deleted Data* ❭ to view the deleted record.

In case you need to retain certain information, you can export forecasts to Microsoft Excel prior to depersonalization.

25.2 Create Forecasts

Sales representatives and sales managers can create sales forecasts based on opportunity header revenue or on the product revenue.

Prerequisites

Administrators must define sales units and assign managers and employees to each sales unit under ▶ *Administrator* ❭ *General Settings* ❭ *Org Structures* ❭. Different functional roles have different options available when creating forecasts.

> **i Note**
>
> You must have access to the *Forecasts* work center to create forecasts for your own use, or for your team if you are a sales manager. Administrators with access to the *Forecast Administration* work center can create forecasts for any sales users.

Procedure

1. Go to the *Forecasts* work center.
2. Click the plus icon to create a forecast.
3. Give it a name, along with the following data.
   - Sales unit - automatically determined based on the logon user
   - Owner - automatically determined based on the logon user
   - Currency - forecast displays in the currency desired
4. Define the forecast time horizon.

> **i Note**
>
> You can create only one forecast for each time horizon. Overlapping periods are not allowed.

5. Select a forecast *Level*. Different options are available, depending on your functional role.

Forecast Level	Description	Functional Role Required
Opportunity forecast	Create a forecast based on opportunity header revenue	Sales representative
		Sales manager
Product forecast	Create a forecast based on product revenue	Sales representative
		Sales manager
Opportunity aggregate forecast	Create a roll-up forecast based on opportunity forecasts submitted by team members	Sales manager
Product aggregate forecast	Create a roll-up forecast based on product forecasts submitted by team members	Sales manager

> **i Note**
>
> As a sales manager, you are authorized to create both regular and aggregate forecasts. A regular forecast includes all the relevant opportunities owned by you and your team members. An aggregate forecast includes the latest forecast versions submitted by your team members.

6. Select a *Source*. Different options are available, depending on the forecast level you choose.

Forecast Level	Forecast Source
Opportunity Forecast	Opportunity Expected Revenue
	Opportunity Weighted Revenue
Product Forecast	Opportunity Product Revenue

Forecast Level	Forecast Source
Opportunity Aggregate Forecast	Roll-up Forecasts
Product Aggregate Forecast	Roll-up Forecasts

For a product forecast, you can *Include Quantity* to forecast based on product quantity.

7. Click one of the *Save* options.

The forecast selects the opportunities that are marked relevant for forecast and with closing dates falling in the defined time horizon. Upon creation, the forecast is assigned status *In Preparation*.

Next Steps

You can review and modify forecast details using the SAP Cloud for Customer add-in for Microsoft Excel.

25.2.1 Enable Sales Target Planning and Forecasting

Administrators must add sales planning and forecasting to the project scope to enable the features.

Prerequisites

Opportunity management must be scoped in before users can work with sales forecasting.

Procedure

1. Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◣. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Sales Planning and Forecasting* ◣ and check the box next to the scoping item.
2. Assign these work centers and views to appropriate users or roles.
   ○ *Sales Target Planning*
   ○ *Forecasts*
   ○ *Forecast Administration*

> **i** Note
>
> Sales representatives with access to the *Forecasts* work center can create forecasts only for their own use. Sales managers with access to the *Forecasts* work center can create forecasts for the sales units that they manage. Users with access to the *Forecast Administration* work center can create forecasts for any sales users.

Related Information

Create Business Roles and Assign Work Centers and Views

25.2.2 Configure Sales Forecast Category

Administrators can maintain categories that classify opportunities in sales forecasting and relevant pipeline reporting.

Go to ▮▶ *Business Configuration* ❯ *Implementation Projects* ▮. Select your project and navigate to ▮▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Sales Forecast Category* ▮ to edit your categories.

25.2.3 Configure Default Sales Forecast Level

Administrators can decide which forecast level is selected by default during forecast creation.

Go to ▮▶ *Business Configuration* ❯ *Implementation Projects* ▮. Select your project and navigate to ▮▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Sales Forecast Level* ▮ to select the default forecast level.

25.2.4 Configure Code List Restrictions for Forecasts

Administrators can restrict forecast level, source, and period that the forecast owner can choose from during forecast creation. It helps improve data consistency in forecast creation across users.

Procedure

1. Go to ▮▶ *Administrator* ❯ *General Settings* ❯ *Code Restrictions* ▮.
2. Click *New* to add a code list restriction.
3. For business object, choose *Sales Forecast*.
4. Select *Code to Restrict*.
5. Select a desired business role.

   > **i** Note
   >
   > You can create one code list restriction for each desired business role. If the field is left empty, the code list restriction applies to all users and you cannot create another code list restriction for this business object.

6. Click *Save and Open*.

7. Click *Edit* at the bottom right.

8. Deactivate values that are not necessary for the desired business role.

9. Click *Save*.

25.3 Manage Forecasts

As the forecast owner, you can maintain overrides based on your real life experience and submit updated versions as needed so the forecast can predict your sales more accurately.

Maintain Forecast Data [page 1108]
    The forecast owner can download the forecast data and modify forecast details using the SAP Cloud for Customer add-in for Microsoft Excel.

Update Forecasts with Latest Opportunity Data [page 1109]
    The forecast owner can update the forecast regularly so that any changes in the relevant opportunities can be promptly reflected in the forecast.

25.3.1 Maintain Forecast Data

The forecast owner can download the forecast data and modify forecast details using the SAP Cloud for Customer add-in for Microsoft Excel.

Prerequisites

You must install the SAP Cloud for Customer add-in for Microsoft Excel. To install the add-in, from your profile menu, click ▶ *Download* ❯ *Add-In for Microsoft Excel* ❯, and run the .exe file.

Context

You can have multiple versions in one forecast. All the versions can be downloaded and reviewed in Microsoft Excel. However, only an inactive version can be edited. Once submitted, a version becomes active and cannot be further edited. Each forecast can have only one inactive version.

Procedure
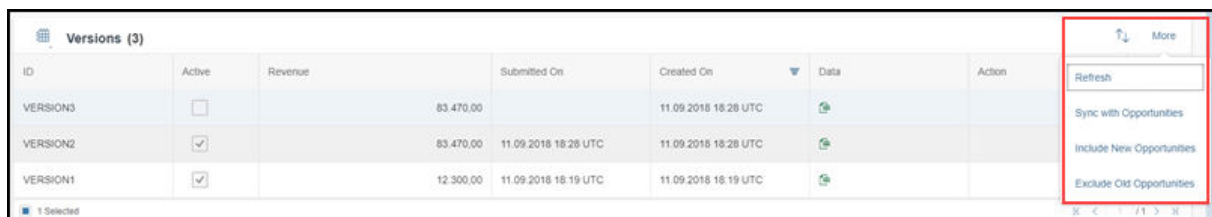
1. Go to the detail view of the forecast.

2. In the line of the inactive version, click the workbook icon ( ) to download the forecast data.

3. Open the downloaded workbook in Microsoft Excel.

4. Click *Enable Editing*.

5. Enter your SAP Cloud for Customer logon credentials.

6. If needed, you can restructure your forecast based on available dimensions and characteristics.

7. If needed, you can override *Forecast Amount*. The cell turns yellow in color, indicating that you made a change.

8. In the header menu of the workbook, click ▶ *SAP Cloud for Customer* ▶ *Upload Input* ▶.

   The button toggles back to *Refresh*, indicating that changes were uploaded successfully.

9. Close Microsoft Excel.

10. Refresh the forecast in the system, and you can see the updated revenue estimate.

25.3.2 Update Forecasts with Latest Opportunity Data

The forecast owner can update the forecast regularly so that any changes in the relevant opportunities can be promptly reflected in the forecast.

- Update a forecast when an inactive version exists
  Select the inactive version, and click *More* to use the available update options:
  - *Sync with Opportunities*: Drop the current forecast data in the version and fetch opportunities afresh.
  - *Include New Opportunities*: Keep the current forecast data in the version and add new opportunities created in the forecast period.
  - *Exclude Old Opportunities*: Keep the current forecast data in the version and remove any opportunities that are no longer relevant. For example, it makes sense to select this option in the following cases:
    - The opportunity is lost.
    - The closing date of the opportunity is moved out of the forecast period.
    - The opportunity is no longer promising and the *Publish to Forecast* flag in the opportunity is switched off.
- Update a forecast when no inactive version exists
  Add a new forecast version that is inactive by default. Upon creation, the new version fetches all the relevant opportunities afresh.

25.4 Submit Forecasts

The forecast owner must submit forecasts for consideration in aggregate forecasts created by upper-level managers.

Context

You can have multiple versions in one forecast. However, only an inactive version can be edited and submitted.You can submit a forecast only when the forecast contains an inactive version. Each forecast can have only one inactive version.

Procedure

1. Go to the detail view of the forecast.
2. Select the inactive forecast version that is ready for submission.
3. From the *Actions* menu at the bottom right, choose *Submit*.

   When you submit the forecast, its status changes to *Submitted*. The forecast version becomes *Active* and no longer editable.

25.5 Revise Forecasts

If not satisfied with the forecast as submitted, the sales manager can request a revision. In that case, the forecast owner must submit another forecast version.

    A sales manager can review a team member's forecast and request a revision if needed.

    When a forecast revision is requested, the forecast owner must submit a revised forecast.

25.5.1 Request a Revision as Sales Manager

A sales manager can review a team member's forecast and request a revision if needed.

Prerequisites

> → Tip
>
> Administrators can configure *Sales Forecast Submission Notification Settings* so the manager can be notified when a forecast is submitted.

Procedure

1. Go to the *Forecasts* work center.
2. Switch to *My Team Forecasts* view.
3. Choose a team member's forecast and go to the detail view.
4. In the line of the newly submitted version, click the workbook icon ( ) to download the forecast data.
5. Review forecast details using the SAP Cloud for Customer add-in for Microsoft Excel.
6. If you are not satisfied with the forecast as submitted, select that forecast version in the detail view. From the *Actions* menu at the bottom right, click *Revise*.

   The status of the forecast version changes to *In Revision*. The forecast no longer shows in the *My Team Forecasts* view or is considered for aggregate forecasts.

25.5.1.1 Configure Forecast Submission Notifications

Administrators can activate system notifications to inform the manager that a new forecast version is submitted.

Go to ▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Business Task Management for Sales Forecast* ❭ *Sales Forecast Submission Notification Settings* ❭ to edit the notification task.

25.5.2 Revise a Forecast as the Forecast Owner

When a forecast revision is requested, the forecast owner must submit a revised forecast.

Prerequisites

> **→ Tip**
>
> Administrators can configure *Sales Forecast Revision Notification Settings* so the forecast owner can be notified when a revision is requested.

Procedure

1. Go to the detail view of your forecast.
2. *Add* a new forecast version if all the existing versions are active and non-editable.

   > **→ Tip**
   >
   > If an inactive version already exists, make sure that your forecast is up-to-date before you revise it. Updating the forecast allows you to include new opportunities created in the forecast period or exclude opportunities that are no longer relevant to the forecast.

3. In the line of the inactive version, click the workbook icon (   ) to download the forecast data.
4. Modify forecast details using the SAP Cloud for Customer add-in for Microsoft Excel.
5. Refresh your forecast in the solution.
6. Select the inactive version that contains revision. From the *Actions* menu at the bottom right, click *Submit*.

Related Information

Maintain Forecast Data [page 1108]
Update Forecasts with Latest Opportunity Data [page 1109]

25.5.2.1 Configure Forecast Revision Notifications

Administrators can activate system notifications to inform the forecast owner that a revision is requested.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◀. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Business Task Management for Sales Forecast* ❯ *Sales Forecast Revision Notification Settings* ◀ to edit the notification task.

25.6 Forecast Reporting

Sales forecasting reports enable salespeople to monitor their forecasts, pipeline performances, and sales targets in real time. Reports are available under ▶ *Analysis* ❯ *Reports* ◀.

SAP Cloud for Customer offers several standard reports for sales forecasting. Your administrators can also utilize the forecast data source *CODFORECASTV* to create customized reports. The forecast data source can be joined with sales target plan data source and opportunity data sources to provide a complete view of sales performance.

You can also view comparisons of forecasts, targets, and pipelines using the predefined forecasting dashboard under ▶ *Analysis* ❯ *Dashboard* ◀.

Related Information

[SAP Cloud for Customer Analytics Guide](#)

25.7 (Deprecated) Work with SAP Intelligent Sales Execution (Datahug) in Forecasting

With Datahug offered by SAP Intelligent Sales Execution, you can explore a new approach to managing your forecasts.

> **i Note**
>
> As of November 2020, SAP Intelligent Sales Execution (Datahug) is discontinued as a stand-alone product. Customers that have purchased the license can continue using the product. SAP will honor existing product subscriptions until the end of your current contract term.

Once your administrator has enabled *Datahug*, you can use its *Forecast Tracker* feature to create forecasts and perform deal-by-deal adjustments based on analysis. You can also roll up your forecast numbers within the same workspace and therefore completely wave goodbye to spreadsheets. Just from one single screen, you can acquire essential information you need to run your weekly sales calls, track forecast history over time, and gain a comprehensive insight into your forecasts.
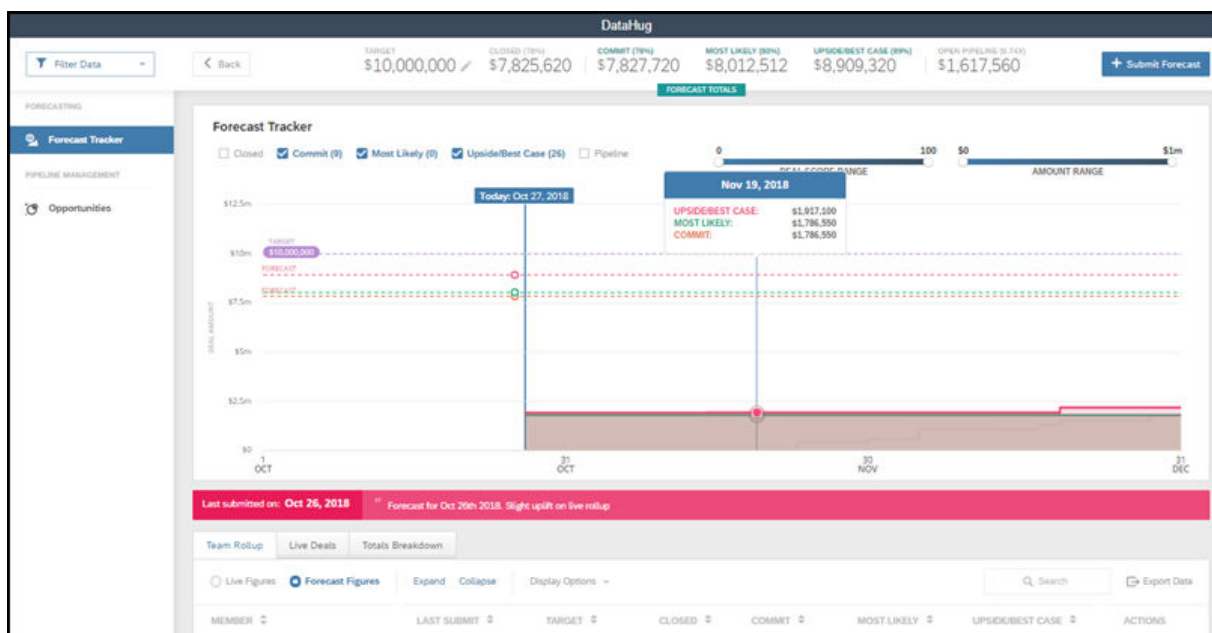
> **i Note**
>
> To use Datahug, a separate license is required from SAP Intelligent Sales Execution.

For more information, please check out SAP Intelligent Sales Execution.

Related Information

(Deprecated) Work with SAP Intelligent Sales Execution (Datahug) in Opportunities [page 355]

25.7.1 Configure SAP Intelligent Sales Execution (Datahug) for Forecast Tracker

Administrators can add Datahug to your project scope and enable users to manage forecasts using Datahug's forecast tracker.

Prerequisites

> **i Note**
>
> To use Datahug, a separate license is required from SAP Intelligent Sales Execution.

Procedure

1. Go to ▶ *Business Configuration* ▶ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Communication and Information Exchange* ▶ *Integration with External Applications and Solutions* ▶ *Integration Scenarios with Cloud Solutions from SAP* ▶ to find the corresponding question about enabling Datahug.

2. Go to ▶ *Administrator* ▶ *Sales and Campaign Settings* ▶ *Datahug Settings* ▶ *Open Datahug Administrator* ▶ and provide an API key and secret for accessing Datahug.

3. Assign the *Datahug* work center view (ID: *COD_DATAHUG_WCF*) to appropriate business users or roles.

   For more details, please check Create Business Roles and Assign Work Centers and Views.

4. Contact SAP Intelligent Sales Execution for further configurations.

   For more information, please check out Prepackaged Integration with SAP Intelligent Sales Execution (SAP Datahug).

25.8 Sales Forecasting FAQ

Having trouble using forecasts? Check this list of questions and answers for help.

25.8.1 How do I include relevant opportunities in forecasts?

You should maintain these fields in your opportunities so they can be included in forecasts.

- *Publish to Forecast*: This flag is toggled on.

- *Owner*: You are the owner of the opportunities.
- *Sales Unit*: This should be linked to the owner and match the forecast sales unit.
- *Start Date* and *Close Date*: They should stay within the forecast period.

25.8.2 What is the difference between regular and aggregate forecasts created by a sales manager?

As a sales manager, you have the flexibility to create both regular and aggregate forecasts. A regular forecast includes all the relevant opportunities owned by you and your team members. An aggregate forecast includes the latest forecast versions submitted by your team members.

26 Employees

Create employees as business users in your system.

Employee is a separate entity. However, for business configuration within your system, employees are also represented as business users in the system. Therefore, for every employee record that you create, a corresponding business user is automatically created in the system.

> **i Note**
>
> All accounts, customers, employees, contacts, partners and competitors are considered as business partners in the system. Therefore, all functions that are common to business partners are applicable to them.

26.1 Scope and Configure Employees

Accurate employee data is essential to keep your business running smoothly — whether to make job titles, organizational assignments and reporting lines transparent to your workforce, or simply to ensure that your colleagues' contact information is always up-to-date.

Go to ▶ *Administrator* > *Users* > *Employees* ▶, to view, create and edit employee data.

You have decided whether you want to create employee records manually, or upload employee data via the migration tool in the implementation project activity *Migration of Employee Data*.

26.1.1 Enable Employees

Scope employees in your solution.

Administrators can activate employees in the scoping.

Go to ▶ *Business Configuration* > *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* > *Questions* > *General Business Data* > *Employee and Service Agents* > *Employees* ▶ to scope employees.

In addition, in order to create and maintain employee data, go to ▶ *Business Configuration* > *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* > *Questions* > *General Business Data* > *Business Partners* > *Employees and Service Agents* > *Employees* > *Employee Maintenance* ▶ and select the scoping question: *Do you want to create and edit employee records in your cloud solution?*

26.1.2 Configure Employee Data Replication

Administrators can configure replication of employee data from an external system. To replicate your employees, maintain the configuration described in this topic.

If you have integrated your solution with an SAP Customer Relationship Management (SAP CRM) or SAP ERP system, then you can replicate employee master data changes within those systems to SAP Cloud for Customer.

To configure employee data replication, go to ▶ *Administrator* ◀ work center and then choose *Employee Staging Area*, to obtain an overview of all employees that require replication, and to determine the status of your replication requests. In this view, you can also perform the following associated actions:

- Schedule jobs to replicate employee master data between systems
- Monitor the replication status of employee data within associated requests
- Amend employee data in replication requests that remain to be processed
- Manually edit and submit failed replication requests that were not automatically uploaded, due to errors in data

> **i Note**
>
> If you encounter replication requests with errors, then we strongly recommend that you correct them in the external system from which the data originated, unless you perform code mapping corrections within SAP Cloud for Customer. For more information, see .

In the *Complete Employee Master Data Replication* view of the *Data Integration* work center, administrators can schedule jobs to replicate the changes made to the employees in the SAP CRM or SAP ERP system into the SAP Cloud for Customer solution.

During the initial load, the complete set of employees is replicated to the Cloud solution. After the initial upload from the external system, all the changes made in these systems are replicated to the Cloud solution by scheduling jobs. This view provides an overview of employees that needs to be replicated and the status of the replication request. It also allows you to manually edit and submit failed replication requests that were not automatically uploaded due to errors in data.

> **i Note**
>
> If there are replication requests with errors, we strongly recommend you correct them in the external system from which the data originates. An exception to this will be to make any code mapping corrections in the Cloud system.

You can view all the successfully replicated employees under ▶ *People* ❯ *Employees* ◀ view.

The Employee Master Data Replication View

This view provides you with an overview of all employee replication requests. By default, only the unsuccessful or not yet started replication requests are displayed. You can view detailed information for every replicated employee listed in the table, when you select the **Remote Employee ID** and select **Edit**.

- The **General Data** section displays information such as the system from which the data is being replicated, basic information about the replication request, and if the replication is relevant. If the selected employee

should not be replicated or if further information needs to be added but is currently unavailable, you can click **Mark as Irrelevant** to indicate that you do not want the entry to be processed. Once the entry becomes relevant for replication, you can click **Mark as Relevant** to make it part of the replication process again.

- The **Personal Data** section displays all the details of the employee that are going to be replicated.
- The **Organizational Assignments** section displays the organization the employee is assigned to, and the validity period of the assignment. You can individually select if an assignment is relevant or not relevant to be processed. If you want a change that should be left out of replication, click **Remove**, and to update the assignment with additional changes click **Add Row**.
- The **Business Role** section displays the role ID of the employee.
- The **Sales Responsibility** section displays the sales organization details to which the employee is assigned.

Edit and monitor employee replication data

By default, only replication requests that are unsuccessful or that have not yet started are displayed. To view detailed information for every replicated employee listed in the table, select the *Remote Employee ID*, then choose *Edit*.

- If the selected employee should not be replicated, or if additional information is required but unavailable, then choose *Mark as Irrelevant* to exclude that entry from processing. To include the entry at a later date in the replication process, choose *Mark as Relevant*.
- Review the *Personal Data* section for information about the employee to be replicated.
- The *Organizational Assignments* section displays the organization to which the employee is assigned, and the validity period of the assignment. You can individually select whether an assignment is relevant or not relevant for processing. If you want to exclude a change from replication, choose *Remove*. To update the assignment with additional changes, choose *Add Row*.

Assign Business Roles to Employees During Employee Replication

1. Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▐, choose your implementation project and choose *Open Activity List*.
2. Show all activities and search for "migration".
3. Choose ▌▶ *Prepare for Data Migration* ❯ *Download Migration Templates* ▐.
4. Download the *Employee Complete Data* migration template.
5. In the *Business Role* column, enter a role that you have already defined in the system.

Result: When you migrate the information in this template, the roles will be assigned to the employees.

Replicate Employees

The system has scheduled daily jobs to replicate the employees. If however, you want to replicate employees manually:

- Select a replication request in the table, and choose **Edit**. Review the information and choose **Replicate**.
- To schedule all replication requests, click **Replicate All**.

The status of the replication request(s) is updated and the request is added to the run.

26.1.3 Configure Number Ranges

Administrators can maintain number ranges for employee records in your system. The internal identification for each employee record is randomly assigned from the specified number range.

To maintain number ranges for employees, go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Number Ranges for Employees and Service Agents* ❯.

Number ranges for employees control how the number of newly created employee and service agent master data records is determined with. With manual number assignment you can enter the Employee number during first data entry. With automatic number assignment, the system automatically increments the number of the next employee by one, starting with the *Start Number*.

> **i Note**
>
> Automatic number D does not apply to the Employee data migration. The Total Length determines the length of the number displayed in the application including the prefix.

26.1.4 Enable Job Definitions

Administrators can enable job scheduling for employees.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Built-in Services and Support* ❯ *System Management* ❯, and enable *Job Scheduling*.

Next, go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *Integrate and Extend* ❯ to manually enter job definitions or migrate using the migration tool.

26.1.5 Configure Job Definitions

Administrations can configure new job definitions.

Steps to configure a new job definition are listed here:

1. Select ▐▶ *Administrator* ❯ *General Settings* ❯ *Company* ❯ *Job Definition* ❯ or choose ▐▶ *Business Configuration* ❯ *Activity List* ❯ *Integrate and Extend* ❯ to manually create a job definition.
2. Choose *New*. The *Define Job* screen appears.
3. Enter a *Job Name* and a *Job ID*.

> **i Note**
>
> You cannot change the Job ID once the job has been saved.

4. Attach a *Job Description*, if required. To do this, click *Add*, and then attach your file or link.
   You can replace a job description later, by editing the job and clicking *Replace*.
5. Click *Save* or *Save and Close* to save the new job.

> **i Note**
>
> You can also create the next new job directly from this screen by clicking *New*.

The new job has been saved to the system and added to the *Job Definition* overview list that appears when you first access the work center view. Whether the job is *Active*, *Inactive*, or *Deprecated* depends on the expiry date.

26.1.6 Import Job Definitions

Administrators can import job definitions with the migration tool. If you have created jobs in a test system (manually or with the migration tool), you can simply upload them to your production system using the migration tool instead of creating them all again manually.

- **Migrate job definitions to your system**
    1. To start with data migration, you must transmit source data to the migration staging area. You can do this in two ways:
        ○ **Upload Text Files**
          This allows you to upload data for each tab separately, using one or more text files.
            1. Select *Upload*, then *Data from Text File*.
               In the window that appears, select the appropriate settings for the text file you want to upload.
               Click *Upload*.
            2. In the *Import Data from Text File* window, you can define individual column mappings. If you save your mappings, you can reuse them for other text files as well.
               Click *Import Data*.
            3. In the *Edit Source File* window, you can make changes to the data you are importing. You can navigate to the different tabs, but only data of the tab that you have uploaded is visible.
               Click *Save and Close*.
               A window appears allowing you to enter a name and description for the uploaded file and the file is added to the list of source files.
               You can now execute the migration of the file by clicking *Execute Migration*.
        ○ **Create a Valid Source File Using a Migration Template**
          Enter legacy data in the migration template to create a valid source file. You can download the migration template using the *Prepare for Data Migration* activity in the *Prepare* phase, or using the *Perform Data Extraction* activity in the *Fine-Tune* phase of the activity list.

For detailed information on how to enter legacy data into migration templates, see the *Introduction* sheet and the *Field List* sheet of the template.

2. Access the Data Migration Tool:

Process your source file with legacy data as follows:

1. Make sure you have created a valid source file using a current migration template filled with legacy data.

2. Access the *Business Configuration* work center and choose the *Implementation Projects* view. Select your implementation project and click *Open Activity List*. Select the *Integrate and Extend* phase, then select the *Job Definitions* activity.

   Note that data migration requires special user authorization. Your administrator can grant the required authorization (*Business Configuration* including the *Data Migration* view) in the *Application and User Management* work center.

3. Process the work steps in the migration tool. For more information, click the Help link within the migration tool.

4. When you have imported the source file successfully, set the migration activity in the activity list to *Completed*.

- **Import job definitions from test system to production system:**

  If you originally created basic data in a test system, you can import it to your production system with minimum effort. Proceed as follows:

  1. The system automatically extracted the data from your test system into a spreadsheet and uploaded it to the migration tool.

  2. In the *Job Definition* activity in the *Integrate and Extend* phase, choose *Migrate job definitions using the migration tool*.

  3. Under *Source Files*, select this spreadsheet and choose *Execute Migration*.

  4. Process the file until you have successfully imported the data to the system.

- **Copy basic data from production system to migration test system:**

  If you created basic data in a production system and are working in a migration test system now, the data was copied to the migration test system **automatically** already. In this case, you do not have to import it to the migration test system.

  To reduce the effort, do not create basic data in the migration test system (this is a specific test system for migration only) initially. In this case, you would have to repeat creation in the production system.

You can verify migrated records in the *Job Definition* view of the *Organizational Management* work center. Compare the data in your legacy system with the data that has been migrated to your SAP solution.

26.1.7 Configure Employee Sales and Organizational Data

Administrators can configure employee sales and organizational data.

Employee Organizational Data

You can assign an employee to multiple org units. When you create an employee, specify the manager to represent the employee reporting line and assign the employee to a **Primary** org unit. Additionally, you can assign an employee to multiple org. units once you remove the primary flag for an employee from other org. units where employee is assigned.

Employee Sales Data

Maintain sales data such as the sales organization, distribution channel, and division if the employee you're creating belongs to a sales unit.

26.1.8 Configure Employee Work Distribution

Administrators can configure employee work distribution.

Create a Work Distribution Rule

1. Go to ▌ *Administrator* ❭ *General Settings* ❭ *Work Distribution* ▐ and choose *Employee Work Distribution*.
2. In the *Employee Work Distribution* view, select a work category.
3. Click *Edit*.

> **i** Note
>
> You cannot change work distribution for past dates. If the *Edit* button is disabled, check the *Effective Date* and ensure that you have not entered a date that occurs in the past.

4. Choose *Work Distribution Rules*, then click *Add*.
   If you want to copy an existing rule, click *Copy*.
   By adding a rule, you are creating a new rule that is added to the bottom of the list. If you wish to insert a rule of a higher priority, then change priority by moving the rules up and down in the table.
5. Enter the name of the rule.
6. Enter the ID of the responsible employee.
7. Enter the validity period of the rule.

> **i** Note
>
> If you change or delete a work distribution rule that begins before the effective date, the rule is only valid to the date before the effective date. If you only change the rule, the system creates a new rule based on the existing rule and includes the changes you make. The new rule is valid as of the effective date.

8. Go to the *Rule Details* section and specify the parameters for the rule.
   Each parameter appears as a tab, for example, *Company*. Using the parameters, you can specify exactly both which parameter is to be included in the rule or excluded from the rule.
9. Click *Check* to verify whether your rule is consistent.
10. Click *Save* or *Save and Close*.

Delete a Work Distribution Rule

1. Go to ▐▶ *Administrator* ❭ *General Settings* ❭ *Work Distribution* ❭ and choose *Employee Work Distribution*.
2. In the *Employee Work Distribution* view, select a work category.
3. Click *Edit*.

> **i** Note
>
> You cannot change work distribution for past dates. If the *Edit* button is disabled, check the *Effective Date* and ensure that you have not entered a date that occurs in the past.

4. Choose *Work Distribution Rules*.
5. Select the work distribution rule you want to delete and click *Delete*.
6. Click *Save* or *Save and Close*.

Set a Work Category to Undefined

1. Go to ▐▶ *Administrator* ❭ *General Settings* ❭ *Work Distribution* ❭ and choose *Employee Work Distribution*.
2. In the *Employee Work Distribution* view, select a work category that has the status *Defined Work Distribution*.
3. Click *Action* and select the option *Set to Undefined*.

26.1.9 Configure Approval Process for Employee Time Recording

Administrators can configure approval process for employee time recording using the standard multistep approval process for time reports and time recording. To do this, follow these steps:

1. Go to ▐▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▐▶ *Edit Project Scope* ❭ *Questions* ❭ *General Business Data* ❭ *Employees and Service Agents* ❭ *Employees* ❭ and select the scoping element **Employees**.
2. Next, go to ▐▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▐▶ *Edit Project Scope* ❭ *Questions* ❭ *General Business Data* ❭ *Employees and Service Agents* ❭ *Employees* ❭ and in the *Enable Time Recording* group, select the sccoping question: *Do you wish to enable time recording feature?*
3. Next, go to ▐▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▐▶ *Edit Project Scope* ❭ *Questions* ❭ *General Business Data* ❭ *Employees and Service Agents* ❭ *Employees* ❭ and in the *Approval for Time Recording* group, select the scoping question: *Do you want to use a multi-step approval for Time Recording?*

For more information, see Working with Time Recording.

26.1.10 Configure Notifications for Employee Delegates

Administrators can define notifications for delegates, where the delegate receives notifications of tasks to be completed, or general notifications for the employee who is absent. Follow the steps given below to create a delegate notification:

> **i Note**
>
> When you or the employee activates delegate, the system automatically provides copies of notifications to the delegate without the administrator having to manually maintain this view.

1. Go to ▌ *Administrator* ❯ *Notification of Delegates* ❯.
2. Select the employee for whom you want to create or edit delegates, and choose *Edit Delegates*.

   > **i Note**
   >
   > You will see a list of existing delegates, if any. You can activate them by selecting *Activate*.

3. To create a new delegate, select *Add Row* and enter:
   1. The *Relationship Type* depending on whether the employee you selected is the employee who will be absent or the employee who will become the delegate.
   2. The *Related Employee* who will either be a delegate for or have work delegated to him or her by the former employee, depending on what you select in the previous column.

      > **i Note**
      >
      > To activate this delegate immediately, select *Activate*.

4. Save your changes.

26.1.11 Web Services for Business Partner End-of-Purpose

Determine if you need to retain business partner data in your system when that data has already been deleted from an integrated external system.

The following graphic describes process flow to determine the End-of-Purpose for your business partner data. You can use web services or manually block such business partners in your system using blocking reasons.

Web service interfaces and enhanced interfaces are enabled to support blocking of business partners. Use these services in scenarios where integrated external systems block or delete business partner data in their system landscape. These interfaces allow the external systems to query and maintain the End-of-Purpose for business partners. Since the definition of what constitutes the end-of-purpose for a business partner is subjective to the external system, these interfaces are empty CHECK interfaces to allow you to create custom queries.

For business partners blocked using the below mentioned interfaces, data cannot be retrieved in list views in work centers, value help in related fields, values selectors, analytics, duplicate checks and web service or oData queries in the application.

Web Services for Business Partner End-of-Purpose

Web Service	Description
II_BUPA_EOP_CHECK_IN	This interfaces uses enhancement spot ES_BUPA_EOP_CHECK to provide a business add-in hook in SAP Cloud Application Studio. Use this hook to create custom query for setting end-of-purpose information.
II_BUPA_EOP_MAINTAIN_IN	Use this interface to set the *End-of-Purpose* flag for business partners. If this flag is set, then the business partner data is hidden in corresponding work centers and value helps and is not visible to users. Note that the data can be viewed by administrators in the *Data Protection and Privacy* work center.

Web Service	Description
`II_BUPA_ERP_EOP_CHECK_IN`	This interface uses enhancement spot `ES_BUPA_ERP_EOP_CHECK` to provide a business add-in hook in SAP Cloud Application Studio. Use this hook to create custom query for setting end-of-purpose information.
`II_BUPA_ERP_REPL_IN`	New attribute has been added in element structure for the existing interface. Set the indicator for business completed / End-of-Purpose flag. If this flag is set, then the business partner data is hidden in corresponding work centers and value helps and is not visible to users. Note that the data can be viewed by administrators in the *Data Protection and Privacy* work center.

26.1.12 Create Event Notifications for Employee and Partner Contacts

Create an event notification for enabled employee and partner contacts.

Administrators add the event under ‖ *Administrator* ❯ *General Settings* ❯ *Event Notification* ❯ *Business object: Employee* ❯ *Create* ❯ *Add* ❳ or modify existing events as necessary.

26.2 Employee Sales Data

Employees are always created with an assignment to an organizational unit. Therefore, you must create the necessary sales data required to use employees for various business needs within the org. structure of your company. You can also use territories, distribution channels and divisions for your employees.

How Employee Sales Data is Used

An employee sales data is used for the following:

- In **My Team** queries and relative selects in reports will consider primary and secondary employee assignments.
- **Data access** based on org. unit also considers secondary employee assignments.
- **Reporting line manager** determination in Notifications and Approvals will consider primary employee assignment.
- For **Access Restrictions** with business context 1015 (Sales Documents, Accounts). If an employee is assigned to an organizational unit without an assigned distribution channel or division, that employee is not restricted from accounts or sales documents based on his or her sales data.

26.2.1 Configure Employee Sales and Organizational Data

Administrators can configure employee sales and organizational data.

Employee Organizational Data

You can assign an employee to multiple org units. When you create an employee, specify the manager to represent the employee reporting line and assign the employee to a **Primary** org unit. Additionally, you can assign an employee to multiple org. units once you remove the primary flag for an employee from other org. units where employee is assigned.

Employee Sales Data

Maintain sales data such as the sales organization, distribution channel, and division if the employee you're creating belongs to a sales unit.

26.2.2 Configure Access Restriction Based on Employee Sales Data

The Access Restriction rule *1015 - Employee, Territory, Account, Sales Data* provides access based on employee sales data only.

The following additional restrictions apply.

- Sales data for an employee is used for access restriction with business context 1015 (Sales Documents, Accounts). If an employee is assigned to an organizational unit without an assigned distribution channel or division, that employee will not be restricted from accounts or sales documents based on his or her sales data.
- If an employee is a manager, access is granted to documents or accounts with assigned employees who are in the manager's organizational units (including sub-units), not considering any territory restrictions. The rule applies equally to functional and reporting line managers.

> i Note
>
> A relationship change triggers a corresponding update for access restrictions. For any changes made to the *Works for* relationship for employees, an update is triggered for the identity restrictions for access restriction rule 6 - *My Workforce*. However the corresponding update of access restrictions happens with a time lag of 24 hours.

26.3 Edit or Delimit Employees

Limit the validity of an employee record.

1. In the worklist of the *Employees* view, select an employee record, then choose *Edit*.
2. Edit as much information as you require.
3. If you want to delimit the validity of an employee record, enter the appropriate date in the *Valid To* field. From this date onward, this employee record cannot be used for new business processes.
4. Choose *Save*.

26.4 External ID Visible in Employee Details View

When working in the *Employee* tab, the *Mapping for Integration* section displays all *External IDs* for employee records.

26.5 Maintain Employee Job Definitions

A job is a description of the duties of an employee as you would find it in the employment contract.

The job consists of an ID and a name. It also has an expiry date, which initially is set to unlimited, but can be set to a specific date if a job should no longer be used. To create a list of the jobs required within your company, you can either enter job definitions manually or import them using the migration tool.

When employees are assigned or hired to an org unit, they require an association with a job in the system. The job then characterizes the employee assignment and is also used in to fulfill service-related tasks. In the *Show* dropdown in this view, you can display jobs according to the following criteria:

- *Active (Unlimited Validity)*: Shows jobs that have no expiry date.
- *Active (Limited Validity)*: Shows jobs that have an expiry date in the future.
- *Inactive*: Shows jobs that are outside their validity period.
- *All*: Shows all jobs.

26.5.1 Enable Job Definitions

Administrators can enable job scheduling for employees.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❳. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Built-in Services and Support* ❯ *System Management* ❳, and enable *Job Scheduling*.

Next, go to ⏵ *Business Configuration* ⏵ *Implementation Projects* ⏵. Select your project and navigate to ⏵ *Open Activity List* ⏵ *Fine-Tune* ⏵ *Integrate and Extend* ⏵ to manually enter job definitions or migrate using the migration tool.

26.5.2 Configure Job Definitions

Administrations can configure new job definitions.

Steps to configure a new job definition are listed here:

1. Select ⏵ *Administrator* ⏵ *General Settings* ⏵ *Company* ⏵ *Job Definition* ⏵ or choose ⏵ *Business Configuration* ⏵ *Activity List* ⏵ *Integrate and Extend* ⏵ to manually create a job definition.
2. Choose *New*. The *Define Job* screen appears.
3. Enter a *Job Name* and a *Job ID*.

> **i Note**
>
> You cannot change the Job ID once the job has been saved.

4. Attach a *Job Description*, if required. To do this, click *Add*, and then attach your file or link.
   You can replace a job description later, by editing the job and clicking *Replace*.
5. Click *Save* or *Save and Close* to save the new job.

> **i Note**
>
> You can also create the next new job directly from this screen by clicking *New*.

The new job has been saved to the system and added to the *Job Definition* overview list that appears when you first access the work center view. Whether the job is *Active*, *Inactive*, or *Deprecated* depends on the expiry date.

26.5.3 Import Job Definitions

Administrators can import job definitions with the migration tool. If you have created jobs in a test system (manually or with the migration tool), you can simply upload them to your production system using the migration tool instead of creating them all again manually.

- **Migrate job definitions to your system**
  1. To start with data migration, you must transmit source data to the migration staging area. You can do this in two ways:
     - **Upload Text Files**
       This allows you to upload data for each tab separately, using one or more text files.
       1. Select *Upload*, then *Data from Text File*.
          In the window that appears, select the appropriate settings for the text file you want to upload. Click *Upload*.
       2. In the *Import Data from Text File* window, you can define individual column mappings. If you save your mappings, you can reuse them for other text files as well.

Click *Import Data*.

3. In the *Edit Source File* window, you can make changes to the data you are importing. You can navigate to the different tabs, but only data of the tab that you have uploaded is visible. Click *Save and Close*.

A window appears allowing you to enter a name and description for the uploaded file and the file is added to the list of source files.

You can now execute the migration of the file by clicking *Execute Migration*.

○ **Create a Valid Source File Using a Migration Template**

Enter legacy data in the migration template to create a valid source file. You can download the migration template using the *Prepare for Data Migration* activity in the *Prepare* phase, or using the *Perform Data Extraction* activity in the *Fine-Tune* phase of the activity list.

For detailed information on how to enter legacy data into migration templates, see the *Introduction* sheet and the *Field List* sheet of the template.

2. Access the Data Migration Tool:

Process your source file with legacy data as follows:

1. Make sure you have created a valid source file using a current migration template filled with legacy data.

2. Access the *Business Configuration* work center and choose the *Implementation Projects* view. Select your implementation project and click *Open Activity List*. Select the *Integrate and Extend* phase, then select the *Job Definitions* activity.

Note that data migration requires special user authorization. Your administrator can grant the required authorization (*Business Configuration* including the *Data Migration* view) in the *Application and User Management* work center.

3. Process the work steps in the migration tool. For more information, click the Help link within the migration tool.

4. When you have imported the source file successfully, set the migration activity in the activity list to *Completed*.

- **Import job definitions from test system to production system:**

If you originally created basic data in a test system, you can import it to your production system with minimum effort. Proceed as follows:

1. The system automatically extracted the data from your test system into a spreadsheet and uploaded it to the migration tool.

2. In the *Job Definition* activity in the *Integrate and Extend* phase, choose *Migrate job definitions using the migration tool*.

3. Under *Source Files*, select this spreadsheet and choose *Execute Migration*.

4. Process the file until you have successfully imported the data to the system.

- **Copy basic data from production system to migration test system:**

If you created basic data in a production system and are working in a migration test system now, the data was copied to the migration test system **automatically** already. In this case, you do not have to import it to the migration test system.

To reduce the effort, do not create basic data in the migration test system (this is a specific test system for migration only) initially. In this case, you would have to repeat creation in the production system.

You can verify migrated records in the *Job Definition* view of the *Organizational Management* work center. Compare the data in your legacy system with the data that has been migrated to your SAP solution.

26.6 Create Employee Delegates

Employee delegates as substitutes for employees on vacation.

If an employee is on vacation or temporarily absent, employees can define delegates for themselves, defining relevant access rights by area. Administrators can create delegates for all employees. You can create delegates for yourself, or administrators can create delegates for employees who are away from the office, either for a short period or long period of time. The delegated employee gains certain access rights of the substituted employee for the specified period of time.

Follow these steps to create employee delegates:

1. Depending on your role, follow the appropriate path:

   Where Can I Define Delegates?

Role	Where?
User	▶ *People* ❭ *Delegates* ❭
Administrator	▶ *Administrator* ❭ *Users* ❭ *Delegates* ❭

2. Select *New* and define the following:
   1. The employee who will be away temporarily.

      > **i Note**
      >
      > Users can only define delegates for themselves. Administrators can define delegates for all employees.

      Once the employee is selected, the system displays all the work centers assigned to him or her.
   2. A delegate to replace the employee.
   3. The start date and end date during which you want the delegate to take over responsibilities.

      > **i Note**
      >
      > If you enter the start date of a substitution in the future, then the system saves the delegate with the status *Not Started*. By default, only **active delegates** are displayed. If you want to see future delegate assignments, use the filter *Planned Delegates*.
   4. Define which *Access Rights* that you want to grant to the delegate.

      > **i Note**
      >
      > You can create either a full substitution or a partial substitution. In full substitution, you grant the delegate access to all the work centers assigned to the employee. In partial substitution, you create multiple delegates, granting access to only selected work centers to each of the delegates.

3. *Save* the delegate.

   > **i Note**
   >
   > If you want to end a substitution before the specified end date, choose ▶ *Actions* ❭ *Delete* ❭.

26.6.1 Configure Notifications for Employee Delegates

Administrators can define notifications for delegates, where the delegate receives notifications of tasks to be completed, or general notifications for the employee who is absent. Follow the steps given below to create a delegate notification:

> ℹ Note
>
> When you or the employee activates delegate, the system automatically provides copies of notifications to the delegate without the administrator having to manually maintain this view.

1. Go to ▶ *Administrator* ❯ *Notification of Delegates* ◀.
2. Select the employee for whom you want to create or edit delegates, and choose *Edit Delegates*.

   > ℹ Note
   >
   > You will see a list of existing delegates, if any. You can activate them by selecting *Activate*.

3. To create a new delegate, select *Add Row* and enter:
   1. The *Relationship Type* depending on whether the employee you selected is the employee who will be absent or the employee who will become the delegate.
   2. The *Related Employee* who will either be a delegate for or have work delegated to him or her by the former employee, depending on what you select in the previous column.

      > ℹ Note
      >
      > To activate this delegate immediately, select *Activate*.

4. Save your changes.

26.6.2 Configure Workflows to Send E-Mail Notifications to Active Delegates

Administrators can configure workflows to allow active delegates in your system can receive e-mail notifications.

Use this feature to ensure information channeled for employees is received by their delegates or substitutes in the absence of the employees. You can configure this feature under ▶ *Administrator* ❯ *Workflow Rules* ❯ *Workflow Settings* ❯ *Recipient Determination* ❯ *Determine the active delegates for an employee in the system, as a recipient in workflow rules* ◀.

26.7 Employee Work Distribution

Create and configure rules to distribute work items to employees.

Create and configure rules to distribute work items to employees. The system uses these rules to determine the employee responsible for work items. Depending on the work category, the system directs the work items to the determined employee, or provides the employee as a proposal in the relevant business document.

Work distribution defines the process of assigning work to an org unit or employee. By default, work items in the solution are visible to all users that have the corresponding access rights. However, for some business processes the org unit or employee responsible for a work item has to be determined. For these areas, you can define work distribution rules that enable you to automatically assign business documents and tasks to dedicated org units or employees.

The work category is the central element for work distribution. A work category represents a specific part of work in a business area and is related to one or more business documents. Each work category provides parameters that you can use to define work distribution rules, according to which the system determines the responsible org unit or employee for a business document.

26.7.1 Configure Employee Work Distribution

Administrators can configure employee work distribution.

Create a Work Distribution Rule

1. Go to ▶ *Administrator* ❯ *General Settings* ❯ *Work Distribution* ❮ and choose *Employee Work Distribution*.
2. In the *Employee Work Distribution* view, select a work category.
3. Click *Edit*.

> **i Note**
>
> You cannot change work distribution for past dates. If the *Edit* button is disabled, check the *Effective Date* and ensure that you have not entered a date that occurs in the past.

4. Choose *Work Distribution Rules*, then click *Add*.
   If you want to copy an existing rule, click *Copy*.
   By adding a rule, you are creating a new rule that is added to the bottom of the list. If you wish to insert a rule of a higher priority, then change priority by moving the rules up and down in the table.
5. Enter the name of the rule.
6. Enter the ID of the responsible employee.
7. Enter the validity period of the rule.

> **i Note**
>
> If you change or delete a work distribution rule that begins before the effective date, the rule is only valid to the date before the effective date. If you only change the rule, the system creates a new rule

> based on the existing rule and includes the changes you make. The new rule is valid as of the effective date.

8. Go to the *Rule Details* section and specify the parameters for the rule.
   Each parameter appears as a tab, for example, *Company*. Using the parameters, you can specify exactly both which parameter is to be included in the rule or excluded from the rule.
9. Click *Check* to verify whether your rule is consistent.
10. Click *Save* or *Save and Close*.

Delete a Work Distribution Rule

1. Go to ▶ *Administrator* ❯ *General Settings* ❯ *Work Distribution* ❳ and choose *Employee Work Distribution*.
2. In the *Employee Work Distribution* view, select a work category.
3. Click *Edit*.

   > **i Note**
   >
   > You cannot change work distribution for past dates. If the *Edit* button is disabled, check the *Effective Date* and ensure that you have not entered a date that occurs in the past.

4. Choose *Work Distribution Rules*.
5. Select the work distribution rule you want to delete and click *Delete*.
6. Click *Save* or *Save and Close*.

Set a Work Category to Undefined

1. Go to ▶ *Administrator* ❯ *General Settings* ❯ *Work Distribution* ❳ and choose *Employee Work Distribution*.
2. In the *Employee Work Distribution* view, select a work category that has the status *Defined Work Distribution*.
3. Click *Action* and select the option *Set to Undefined*.

27 Competitors

In the *Competitors* work center view, create new competitors and maintain competitor information and use competitor classification to classify the level of competition. Create competitor products and maintain product comparison level for the competitor products.

27.1 Scope and Configure Competitors

Administrators can scope and configure competitors using scoping, scoping questions and fine-tuning activities.

27.1.1 Configure Competitor Product Comparisons

Maintain product comparisons for competitor products..

Administrators can maintain competitor product comparisons. Go to ▷ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▷ *Open Activity List* ❭ *Fine-Tune* ❭ *Competitor Products* ❭ to configure competitor product comparison..

27.1.2 Configure Competitor Classification

As an administrator, you can classify your competitors with various competition levels, for example, high, medium, or low threats. To maintain this configuration. go to ▷ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▷ *Open Activity List* ❭ *Fine-Tune* ❭ *Competitor* ❭.

27.1.3 Configure Migration of Competitors

Administrators can setup the migration of competitors and competitor products from external systems to your cloud solution.

To migrate competitors, go to ▷ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▷ *Open Activity List* ❭ *Integrate and Extend* ❭ *Migration of Competitors* ❭.

27.1.4 Configure Migration of Competitor Products

Administrators can set up migration of competitor products from external systems to your cloud solution.

To migrate competitors, go to ▎▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▎▶ *Open Activity List* ❭ *Integrate and Extend* ❭ *Migration of Competitor Products* ❭.

27.1.5 Configure Address Type Ahead Search

Administrators can configure address type ahead search using standard microservices from SAP Cloud Platform.

Prerequisite

When you purchase a license for the microservice, you are assigned a **Request URL** to access SAP DQM micro services. The URL is unique to your data center on SAP Cloud Platform and is required to activate integration with the SAP Cloud for Customer. You can access this URL under ▎▶ *SCP Cockpit* ❭ *Services* ❭ *Data Quality Services* ❭ *Application URL* ❭. Copy *Address Cleanse URL* under *Available endpoints* to a notepad on your local machine. You assign this URL when configuring the integration in your cloud for customer system.

> **i Note**
>
> Do not use the URL under *Available endpoint when using client certificates*.

Configuration in SAP Cloud Platform

Generate OAuth 2.0 Client IDs and Token Values to configure in SAP Cloud Platform. For detailed documentation on generating OAuth 2.0 certificate to SAP Cloud Platform, see OAuth 2.0 Authorization.

Steps for Configuring Microservice for Address Type Ahead Search in SAP Cloud for Customer

1. Enable the scoping question as follows:

   1. Go to ▶ *Business Configuration* ▶ *Implementation Projects* ▶.
   2. Select your project and navigate to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Built in Services and Support* ▶ *Business Environment* ▶ *Addresses and Languages* ▶.
   3. Select the scoping question: *Do you want to use the address type ahead search functionality?*

2. Configure Mashup Web Services
   There are two mashup web services need to be configured.

   1. *DQM Address Type Ahead* mashup service:

      1. Go to ▶ *Administrator* ▶ *Mashup Web Services* ▶.
      2. Select the pre delivered service (SW00095) and *Copy* the template to create new service.

         > **i Note**
         >
         > Under *General Information*, retain the *Service Name* and *Description* as it is.

      3. Under *Service Information*, update the necessary fields as:
         - *Authorization Method*: OAuth
         - *HTTP Method*: Post
         - *URL*: Maintain the Token Endpoint URL that is provided in OAuth settings from SAP Cloud Platform.
         - Enter the *Consumer Key* and *Consumer Secret* that you have created during OAuth settings.

         > **i Note**
         >
         > Ensure that you retain the other fields as it is.

      4. Click *Save* and *Activate*.

   2. *DQM Address Type Ahead Endpoint* mashup service:

      1. Go to ▶ *Administrator* ▶ *Mashup Web Services* ▶.
      2. Select the pre delivered service (SW00094) and *Copy* the template to create new service.

         > **i Note**
         >
         > Under *General Information*, retain the *Service Name* and *Description* as it is.

      3. Under *Service Information*, update the necessary fields:
         - *Authorization Method*: OAuth
         - *HTTP Method*: Post

- URL: Maintain the *Address Cleanse URL* from *Available endpoints* list in SAP Cloud Platform.

> i Note
>
> - Do not use the URL from *Available endpoints* when using client certificates list in SAP Cloud Platform.
> - Ensure that you retain the other fields as it is.

4. Click *Save* and *Activate*.

> i Note
>
> Maintain only one mashup for Token and Service. Multiple mashups for the same will create inconsistency.

Billing for DQM Service for Address Type Ahead Search

The street address type ahead search is enabled by scoping question for each SAP Cloud for Customer to SAP DQM micro service call. The following considerations apply as part of the address type ahead search service:

- Street address type ahead search is considered as two different transactions by DQM service.
- Street and post office box addresses within the same address type ahead search transaction are considered separately.

For detailed information on billing for these API calls, refer to Billing/Usage Information (Per API Call).

Additional Information

For detailed information on enabling and configuring DQM Microservices, see the documentation under Data Quality Management, microservices for location data (DQM microservices).

27.2   Competitor Product Surveys

Capture information about your competitor's products in a competitor product surveys.

Create your own criteria to audit your competitors' products in store. For example, you may want to check availability, prices, or promotions for your competitor's product to see how your products compare. Competitor product surveys are created like a regular product survey, but with competitor products instead.

Related Information

https://help.sap.com/viewer/24765b551a014b779b95c7b07d8e9079/latest/en-US/1143cc7fad7348089f0cbf8f918456ff.html

27.3 Competitor Surveys

Evaluate competitor performance.

Gain insight about your competitors with competitor surveys. Measure performance across multiple categories and compare these results to your own. Use this data to improve your performance and stay ahead of your competition.

Competitor surveys collect data about the competitors related to an opportunity. If you add a competitor survey to an opportunity, the competitors listed in the opportunity will be added to the survey by default. If you'd like to add additional competitors to a survey, you can do so when designing the survey.

28   Contacts

Use contacts to represent the relationship between contacts and accounts. Contacts can be maintained only for corporate accounts.

> **i** Note
>
> All accounts, customers, employees, contacts, partners and competitors are considered as business partners in the system. Therefore, all functions that are common to business partners are applicable to them.
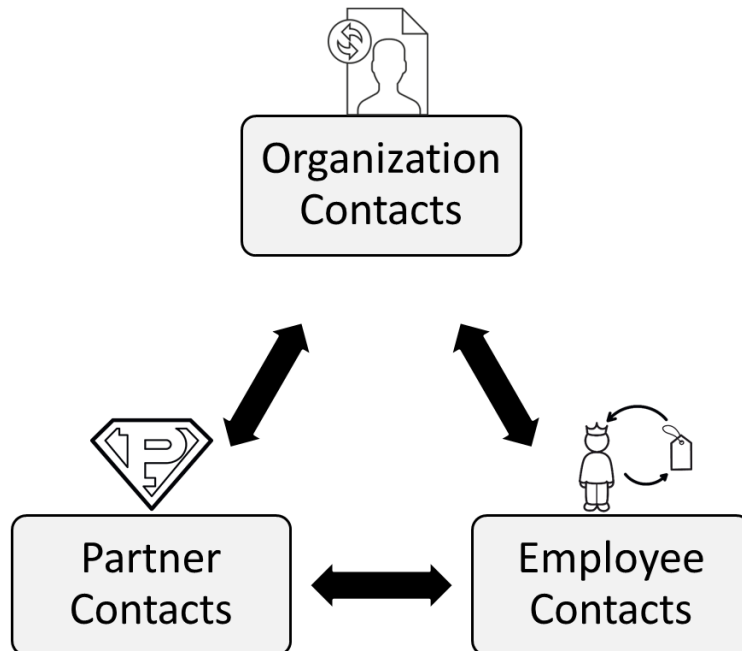
Contacts are persons that have a relationship with a corporate account and may be involved in business processes like activities, orders, opportunities, and so on. You can maintain the details for contacts by creating a contact or using the relation between a contact and an account. You can define a contact as sales area dependent and assign them to multiple accounts. You can also configure custom relationships between accounts and contacts in your SAP Cloud for Customer system.

Additionally, use contacts to:

- Present a 360° view of the relationship that your organization has with a specific contact
- Create the following for contacts:
  - Phone calls
  - Appointments
  - Tasks

○ E-mails
  ○ Social media messages
- Set a status for a contact. For example, you can set a contact to *Active* or you can *Block* a contact.

28.1 Scope and Configure Contacts

Business configuration fine tuning for contacts

28.1.1 Enable Contacts

Administrators can enable contacts by scoping **Account Management**.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◀. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ◀ and select *Account Management*.

28.1.2 Enable Customer Merge

Administrators can enable customer merge for accounts and contacts.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◀. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *General Business Data* ❯ *Business Partners* ❯ *Handling of Business Partners* ◀ and select the scoping question: *Do you want to enable accounts merge?*

> **i Note**
>
> SAP does not recommend configuring customer merge if your customer master records are replicated with an external system (that is SAP ERP and SAP CRM integration is scoped). This is because a merge execution does not trigger a corresponding replication in the external system which may give rise to data inconsistency.

In order to initiate merge, you must have the *Data Cleansing* work center view assigned to user. In this work center view, click on *New* to trigger a manual merge. You can select a maximum of three customer records - one master and two duplicate records to be merged. Note that this action can be initiated only if the merge object is in one of the following statuses:

- Not Started
- Merge Failed
- Merge Completed
- Realignment Failed

For detailed troubleshooting information for customer merge, see the section - **Customer Merge FAQs**.

Related Information

28.1.3 Configure Realignment of Closed Transactions of Merged Records

By default, the account merge fetches all open transactions of merged or obsolete records. If you need to also fetch closed transactions, you must maintain the required configuration.

Administrators can maintain the configuration to include or exclude closed transactions of obsolete records in account merge. To do this, go to ▌▶ *Business Configuration* ❭ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Edit Project Scope* ❭ *Questions* ❭ *General Business Data* ❭ *Business Partners* ❭ *Handling of Business Partners* ❭ *Business Partner Merge* ▌ and select the scoping question: *Do you want to enable enhanced document realignment during account merge?*

28.1.4 Implement Business Add-In To Control Copying Address Lines During Merge

Use the new business add-in in SAP Cloud Application Studio to turn off address copy from duplicate to the master record during the merge process. With this BAdI, you can also control what address lines of obsolete records be copied to or excluded from the primary record.

The method `CONTROL_MERGE_LOGIC` is included in the enhancement option - `CustomerMergeControl` In this method, set the `SkipAddressCopyToMaster` = *True*.

- Import Parameter: InputData of type BadiCustomerMergeControlInput
- Export Parameter: BadiCustomerMergeControlResult
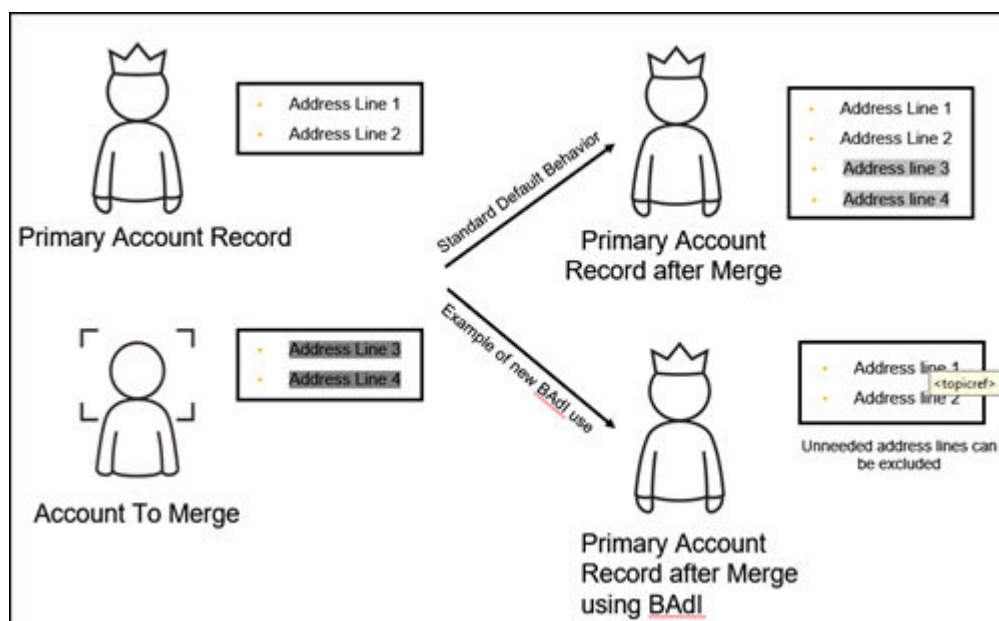
28.1.5 Differentiate Between Standard Change and Merge Context

Administrators can now differentiate between updates to an account triggered by merge or by standard change process. This differentiation can be implemented using custom logic such that the custom logic is executed only for change instances occuring due to merge.

Use business partner utility - `AP.FO.BusinessPartner.Globalnamespace BusinessPartnerUtilities.IsBusinessPartnerMerge`o implement this custom logic. This utility is provided for the standard Business Partner business object provided by SAP and is available in SAP reuse library.

28.1.6 Configure Contact Duplicate Check

Administrators can configure duplicate check for contacts.

Use datasource `CONTACT_DUPLICATE_CHECK` (service name - contactduplicatecheck) to check for duplicates before creating contacts from an external system.

28.1.7 Configure Basic Contact Data

Administrators can configure basic contact data.

Go to ▌▶ *Business Configuration* ❭ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Contacts* ▌, and maintain the following for your business requirements:

- **Departments** (name of department of a contact in the business partner's company)
- **Functions** (that the contact is responsible for)
- **VIP Contacts** (Mark contacts as VIP Contacts)

28.1.8 Configure Migration of Contact Addresses

Administrators can migrate contact addresses.

Go to ▌▶ *Business Configuration* ❭ *Implementation Projects* ▌. Select your project and navigate to ▌▶ *Open Activity List* ❭ *Fine-Tune* ❭ *Migration of Personal Addresses for Contacts* ▌, to migrate personal addresses for contacts. For detailed information, see the documentation in the system.

28.1.9 Configure Contact to Employee Assignment

Administrators can configure contact to employee assignment. Directly assign contacts to employees in the *Contacts* detailed view. You can also assign a main employee responsible for the contact. The standard query *My Contact* has been enhanced to consider the direct contact-employee assignment.

The following configuration must be maintained to enable the employee - contact assignment:

- To enable access restrictions based on contact employee assignment, go to ▶ *Business Configuration* ▶ *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* ▶ *Questions* ▶ *Built-In Services and Support* ▶ *User and Access Management* ▶ and select the scoping question: *Do you want to restrict access rights for contacts using Contact Team Relationship?*
- If the above scoping question is enabled and if the business role is configured to have access restrictions for contacts, then all the access rules with employee reference will always refer to contact team assignment for contact employee restrictions.
- All other access rule references will be derived from the account assigned to the contact (for example territory, sales area and so on.).

28.1.10 Configure Relationships Including Buying Center

Administrators can configure relationships including buying center.

Go to ▶ *Business Configuration* ▶ *Implementation Projects* ▶. Select your project and navigate to ▶ *Open Activity List* ▶ *Fine-Tune* ▶ *General Business Partners* ▶.Under *General Business Partners*, define the possible relationships between business partners in your system. The standard solution provides relationship codes that you can use. Choose to define new relationship codes or even disable the standard codes. Note that certain standard relationship codes cannot be deactivated.

Enter a code for and the name of the relationship along with a description for both directions of the relationship, such as Has Contact for the relationship of business partner 1 with business partner 2 with business partner 1 being an organization. Depending on the relationship type, choose whether the business partner is a person or an organization, and select the business partner roles that are permitted for each of the business partners in the relationship.

Assign Relationships to Party Role in Party Role Definition

You can also link the relationships you define to party role in involved party. Do this, for example, if you want to automatically determine the party role in documents like lead, opportunity, sales quote, activities based on specific relationship.

Example: define a new custom Party Role "Reseller" that has the relationship "Has an OEM" assigned to it.

Sales Area Based Relationships

Configure sales area dependent relationships that are evaluated during transactions involving the accounts.

28.1.11 Configure Buying Center

Administrators can configure buying center based on business partner and buying center relationships..

Enable Buying Center based on Business Partner Relationships

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❚. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Account Management* ❚ and select the scoping question: *Do you want to enable buying center based on business partner relationships?*

Enable Buying Center based on Buying Center Relationships

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❚. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Account Management* ❚ and select the scoping question: *Do you want to enable buying center based on buying center relationships?*

28.1.12 Configure Attributes

You can define attributes or attribute sets and make them visible for users in the advanced searches for accounts, contacts, and individual customers.

Define Attributes and Attribute Sets

Administrators can configure attributes.

Go to ▶ *Administrator* ❯ *Sales and Campaign Settings* ❯ *Attributes* ❚ to view and configure attributes or attribute sets.

> **i Note**
>
> If your solution is integrated with SAP Customer Relationship Management (SAP CRM), then you can only view, but not create or modify, attributes or attribute sets from this screen.

As you maintain attributes, you can configure their characteristics (for example, whether they are mandatory), their value list and their descriptions in one or more languages. As you maintain attribute sets, which represent combinations of attributes, you can select the *Person-Relevant* checkbox to make the attributes visible in the *Attributes* tab of the *Contacts* work center view. You can also select the *Organization-Relevant* checkbox to make them visible in that tab on the *Accounts* or *Individual Customers* work center views.

Enable Search using Attributes

Provided if you personalize your solution to make it visible, you can enable your users to access the *Attributes* field within the advanced search of accounts, contacts and individual customers and maintain conditions there that influence the corresponding search behavior. Once this field is visible and your users select it to maintain conditions, they can specify a combination of attribute sets, attributes, operators and values – for example, Employee Attributes, Region, Equal, and North America, respectively – to apply to the attributes search. Users can also specify additional attribute conditions with the logical operator OR. Once these parameters have been saved, users can apply the associated conditions as an advanced search query to find business partners with corresponding Attributes, and to display them within the attributes tab of the work center view of the associated business partner.

Display in Account Summary

From the item details of an account, when you choose the [Summary] function, Attributes for the account now appear within the resultant account summary.

> i Note
>
> This enhancement only becomes available once you select ▌ *Administrator* ❭ *Form Template Maintenance* ❭ and then choose the *Account Summary* form template and revert to the most recent version.

Access Restrictions

You can configure the business roles in your solution to specify business access restriction BUSINESS_ATTRIBUTE_ASGNM_READ, thereby making attributes read-only for the associated business users

Attribute Data Source

You can use the new report Business Partner with attribute assignment, whose technical name is `CODBUSATTRBPB_Q0001`, to specify search criteria related to Attributes and to find corresponding business partners. Within this report, you can also right-click on the name of a business partner, then choose *Export All Account* and Contacts to New Target Group, to create a target group for the associated accounts and contacts.

Use in Analytics

To drive analytics in relation to attributes, you can use the following new data sources:

Data Sources for Attributes

Data Source ID	Data Source Name	Description
CODBUSATTRBPB	*Business Partner with Attribute Assignment*	Shows all Attribute values assigned to the reference business partners.
⁂ Example CODBUSATTRGENB	*Attribute Assignment*	Contains all Attributes values assigned to the reference business objects.

28.1.13 Configure Marketing Permissions

Administrators can configure marketing permissions. With the communication categories, you can specify how often a customer can be contacted during a certain period of time.

In the *Marketing Permissions* fine-tune activity, you maintain your communication categories and the communication channels for countries/regions with an explicit opt-in. These settings are required to track whether your customers opt-in or opt-out for a specific communication channel.

Go to ▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▶ *Open Activity List* ❭ *Fine-Tune* ❭ and then select the *Marketing Permissions* activity from the activity list.

1. Maintain Communication Channels for Countries/Regions with an Explicit Opt-In:

   > ⚠ Caution
   >
   > It's the responsibility of your organization to comply with national legislation regarding data protection and the provision of marketing materials. Therefore, administrators must configure the solution for each country/region in which, or each customer with whom, your organization intends to conduct marketing activities and, to the extent legally required, make use of the option to store documents such as opt-in or opt-outs.

   To add a country/region where an explicit opt-in is required, click *Add Row*, enter the country/region and the corresponding communication channel, such as e-mail, letter or fax, and save your changes.

2. Maintain Communication Categories:
   1. To create a communication category, click *Add Row*
   2. Enter a communication category, a description, a limit, and the time frame. With the limit and time frame, you can specify how often a customer can be contacted during a certain period of time. When adding communication categories, we recommend starting with the letter Z
   3. Save your work.

28.1.14 Enable Social Media Features

Expose the hidden social media features available in your solution.

Your SAP Cloud for Social Engagementsolution is delivered with the social media features available but hidden. As an administrator, you need to enable the social media features of the solution using *Adaptation Mode*.

1. To enter adaptation mode click *Adapt*, then choose *Enter Adaptation Mode*.
2. Navigate to each of the screens listed below and make the screen edits indicated for each.
    1. When you're on the screen you want to edit, click *Adapt*, then choose *Edit Screen*.
    2. Add or remove elements on the *Screen Layout* tab.
    3. Save your changes.
       You can test your changes before publishing.
    4. When you're finished with your changes you can publish them to make them visible to all users.

Screens to Edit for Enabling Social Media Features

Screen	Navigation	Edits	Notes
Service and Social Settings	▶ *Administrator* ❯ *Service and Social Settings* ❩	Under *Sections*, check the box for *Social Media* to make it visible.	You need to make this change before you can set up any social media channels in your system.
Individual Customers	▶ *Customers* ❯ *Individual Customers* ❩	Under *Fields*, check the box for *Social Media Profile* to make that column visible in the list.	
Individual Customer	▶ *Customers* ❯ *Individual Customers* ❩ then choose a customer to open the details screen	• Under *Sections*, check the box for *Social Information* to make it visible. With *Social Information* selected, under *Fields*, ensure the boxes are checked for *Facebook* and *Twitter*. • Under *Sections*, select *Tabs*, then in the lower list, select *Social Media Messages* and *Social Profiles*.	You need to have at least one customer record in the system before you'll be able to adapt the details screen.
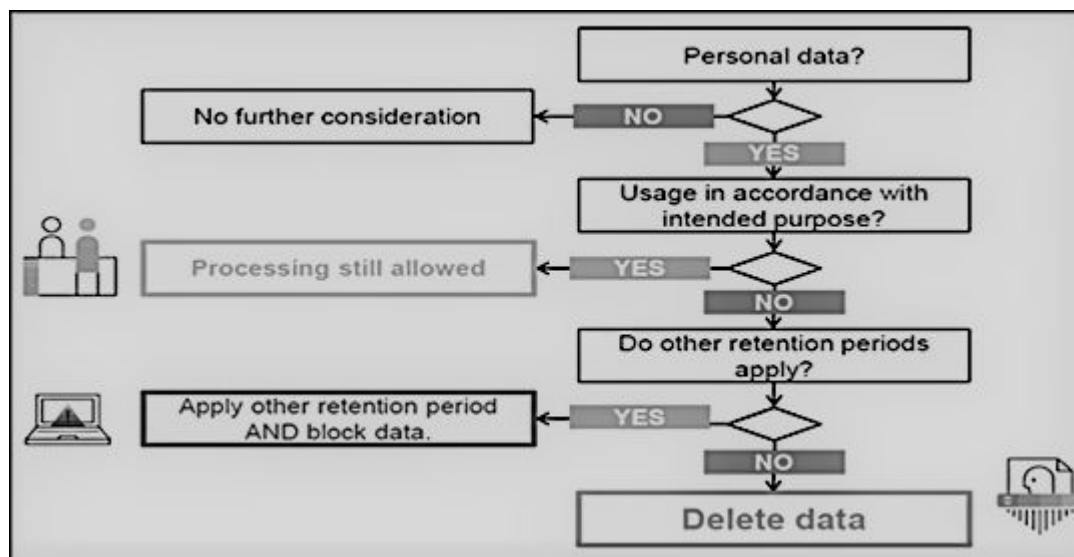
Related Information

Adapting the User Interface ⬈

28.1.15 Web Services for Business Partner End-of-Purpose

Determine if you need to retain business partner data in your system when that data has already been deleted from an integrated external system.

The following graphic describes process flow to determine the End-of-Purpose for your business partner data. You can use web services or manually block such business partners in your system using blocking reasons.

Web service interfaces and enhanced interfaces are enabled to support blocking of business partners. Use these services in scenarios where integrated external systems block or delete business partner data in their system landscape. These interfaces allow the external systems to query and maintain the End-of-Purpose for business partners. Since the definition of what constitutes the end-of-purpose for a business partner is subjective to the external system, these interfaces are empty CHECK interfaces to allow you to create custom queries.

For business partners blocked using the below mentioned interfaces, data cannot be retrieved in list views in work centers, value help in related fields, values selectors, analytics, duplicate checks and web service or oData queries in the application.

Web Services for Business Partner End-of-Purpose

Web Service	Description
II_BUPA_EOP_CHECK_IN	This interfaces uses enhancement spot ES_BUPA_EOP_CHECK to provide a business add-in hook in SAP Cloud Application Studio. Use this hook to create custom query for setting end-of-purpose information.
II_BUPA_EOP_MAINTAIN_IN	Use this interface to set the *End-of-Purpose* flag for business partners. If this flag is set, then the business partner data is hidden in corresponding work centers and value helps and is not visible to users. Note that the data can be viewed by administrators in the *Data Protection and Privacy* work center.

Web Service	Description
II_BUPA_ERP_EOP_CHECK_IN	This interface uses enhancement spot ES_BUPA_ERP_EOP_CHECK to provide a business add-in hook in SAP Cloud Application Studio. Use this hook to create custom query for setting end-of-purpose information.
II_BUPA_ERP_REPL_IN	New attribute has been added in element structure for the existing interface. Set the indicator for business completed / End-of-Purpose flag. If this flag is set, then the business partner data is hidden in corresponding work centers and value helps and is not visible to users. Note that the data can be viewed by administrators in the *Data Protection and Privacy* work center.

28.1.16 Create Event Notifications for Employee and Partner Contacts

Create an event notification for enabled employee and partner contacts.

Administrators add the event under ▌❯ *Administrator* ❯ *General Settings* ❯ *Event Notification* ❯ *Business object: Employee* ❯ *Create* ❯ *Add* ▐ or modify existing events as necessary.

28.1.17 Configure Single Contact Assignment for Account

Assign only one contact per account using the *Is Contact Person For* relationship.

> **i Note**
>
> You can enable this system-wide setting only when your business scenario requires such configuration.

Administrators can configure single contact assignment for account as follows:

1. Go to ▌❯ *Business Configuration* ❯ *Implementation Projects* ▐.
2. Select your project and navigate to ▌❯ *Open Activity List* ❯ *Fine-Tune* ❯ *General Business Partners* ❯ *Maintain Relationships* ▐.
3. Toggle on the *Only One Relationship* option.

28.2 Customer Merge

Customer merge function is available for corporate accounts, individual customers and contacts. This feature allows master data teams to merge duplicate records into a single golden record.

Customer merge helps you to:

- Manage multiple duplicate records for the same customer that may result in inconsistencies in the system.
- Create a golden master record from duplicate records for a single account.
- Re-assign open transactions and closed transactions related to the duplicate record to the golden record (in case there are any open leads or opportunities.

Rules for Transaction Reassignment During Merge [page 1153]
During customer merge, system also reassigns transactions for the accounts. The rules determined for transasction reassignment are listed here.

Merge Criteria for Tab Screens [page 1154]
Find detailed information on the criteria that needs to be fulfilled for merging tabs account details displayed in the respective tabs in the UI.

Differentiate Between Standard Change and Merge Context [page 1159]
Administrators can now differentiate between updates to an account triggered by merge or by standard change process. This differentiation can be implemented using custom logic such that the custom logic is executed only for change instances occuring due to merge.

Status Management in Account Merge [page 208]
Accounts assume various statuses during customer merge. Find detailed information on these statuses in this topic.

Map Obsolete Records to Primary Record For More Insights [page 1160]
Use insights from closed transaction history of obsolete records event without including closed transaction history in account merge. This way you can leverage reporting to show complete picture of primary account.

View Result Log [page 1160]
The *Result Log* screen displays the application logs that are created by the system for each merge transaction.

28.2.1 Rules for Transaction Reassignment During Merge

During customer merge, system also reassigns transactions for the accounts. The rules determined for transasction reassignment are listed here.

Transaction Reassignment in Account Merge

Transactions	Description
Tickets	All the tickets where duplicate account is an involved party should be reparented to the master account .Tickets which could not be re-parented (because of status or due to any other technical reason) to master should be logged in the Merge BO with appropriated error log entry in the application log so that the user can evaluate the issue
Sales Orders	All the Order where duplicate account is an involved party should be re-parented to the master account .Orders which could not be re-parented (because of status or due to any other technical reason) to master should be logged in the Merge BO with appropriated error log entry in the application log so that the user can evaluate the issue
Leads	All the leads where duplicate account is an involved party should be re-parented (because of status or due to any other technical reason) to the master account .leads which could not be re-parented to master should be logged in the Merge BO with appropriated error log entry in the application log so that the user can evaluate the issue
Activities (Phone Call, Appointments, Tasks and Emails.	All activities where duplicate account is an involved party should be re-parented (because of status or due to any other technical reason)to the master account .appointments which could not be re-parented to master should be logged in the Merge BO with appropriated error log entry in the application log so that the user can evaluate the issue
Social Media Messages	All social media messages attached to social profile of duplicate record will also move from duplicate Record to Master post Merge
Visits	All the visits where duplicate account is an involved party should be reparented (because of status or due to any other technical reason) to the master account .Visits which could not be reparented to master should

Transactions	Description
Opportunities	All the opportunities where duplicate account is an involved party should be reparented (because of status or due to any other technical reason) to the master account .Opportunities which could not be reparented to master should be logged in the Merge BO with appropriated error log entry in the application log so that the user can evaluate the issue
Sales Quotes	All the sales quotes where duplicate account is an involved party should be reparented (because of status or due to any other technical reason) to the master account .Quotes which could not be reparented to master should be logged in the Merge business object with appropriated error log entry in the application log so that you can evaluate the issue

28.2.2 Merge Criteria for Tab Screens

Find detailed information on the criteria that needs to be fulfilled for merging tabs account details displayed in the respective tabs in the UI.

Node Handling during Merge

Nodes	Description
Relationships	- The system will merge the account team and relationship records from the duplicate account into master account. - If a relationship is marked as unique and exists in the master record, the system will ignore the same record in duplicate records. For unique relationships master account will always take precedence. - All non-unique relationships will be copied over from duplicate reccord to the master record. - All relationships copied from duplicate to master will be deleted from the duplicate record. - A new relationship 'Is Replaced' /'Replaces' will be created between golden and duplicate record.

Nodes	Description
Territory	• When tenant is configured to have Single territory per account, territory maintained on the duplicate account shall not be copied to master. Territory on the master will remain as is; territory maintained on the duplicate account will not be copied. • When tenant is configured to have multiple territory per account, all territories assigned to duplicate account will be merged into the dedicated sales territory section of the master account. All territories assigned to duplicate account will be merged into the dedicated sales territory section of the master account. System determined sales territories of the master record will not be modified. The newly merged account (master account) will also have all of the territories of the duplicate account.
Address	• All addresses of the duplicate account will be copied over to the master account. This can be deactivated via Custom Extension, see below • The main address in the master account will remain the main address post merge. • Any selections of address data made on the Attribute Selection tab will be applied to the main address. • In case no address information is maintained in the master record, the main address of the duplicate account will be marked as the main address in the master account post merge.
Notes	The Notes added to duplicate Account will be copied over to Master.
Attachments	All attachments from the duplicate account will be copied over to the master account.
Account Team	The system will merge the account team and relationship records from the duplicate account into master account. If a party role in unique and exists in the master record, the system will ignore the same party role from the duplicate record. For unique party roles master account will always take precedence. Uniqueness check for a party role in account team will consider the sales area and the validity dates check. For example, an account can have 2 owners with the same sales area information but with different validity dates. Though owner is a unique role, the uniqueness check will also consider the sales area and validity dates.

Nodes	Description
Sales Area	All sales area information from the duplicate will be copied over to the master account. If the sales area (Sales org, distribution channel, division) information of the master account also exist in the duplicate account, then the sales area record will not be overwritten, the sales area details maintained for the master record will take precedence.
Social Profiles	If both master and duplicate record have social profile , then copy the social profile from duplicate to master EXAMPLE: • Customer A (Master) has FB Social profile assigned FB_1. • Customer B (duplicate) has Twitter Social profile assigned TW_1 • After the merge A will have a new user profile TW_1. • Social profile linked with customer A will have two User profiles one for FB, and one for TW. • If master record does not have a social profile then the social profile from duplicate will be copied to master record
Marketing Permissions	In general the final result after account merge will be a union of values from all the accounts. In case of conflict the master account wins. • **Case 1:** When all accounts have different marketing permissions assigned for different channels -The master account will have a union of all . • **Case 2** : In case of conflict , the permission value maintained in master account will be retained. The system will also copy notes and attachments
Communication Category	In general the final result after account merge will be a union of values from all the accounts. In case of conflict the master account wins. • **Case 1**: When all accounts have different assignments for different channels -The master account will have a union of all . • **Case 2** : In case of conflict , the permission value maintained in master account will be retained

Nodes	Description
Marketing Attributes	In general the final result after account merge will be a union of values from all the accounts. In case of conflict the master account wins. • **Case 1:** When all accounts have different marketing attributes assigned The resultant account will have a union of all the marketing attributes • **Case 2**: When marketing attributes allows multiple values, there are common marketing attributes but different/common values. The master account will have a union of values. • **Case 3** : In case of conflict , the attribute value maintained in master account will be retained

28.2.2.1 Enable Customer Merge

Administrators can enable customer merge for accounts and contacts.

Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▐ . Select your project and navigate to ▌▶ *Edit Project Scope* ❯ *Questions* ❯ *General Business Data* ❯ *Business Partners* ❯ *Handling of Business Partners* ▐ and select the scoping question: *Do you want to enable accounts merge?*

> **i Note**
>
> SAP does not recommend configuring customer merge if your customer master records are replicated with an external system (that is SAP ERP and SAP CRM integration is scoped). This is because a merge execution does not trigger a corresponding replication in the external system which may give rise to data inconsistency.

In order to initiate merge, you must have the *Data Cleansing* work center view assigned to user. In this work center view, click on *New* to trigger a manual merge. You can select a maximum of three customer records - one master and two duplicate records to be merged. Note that this action can be initiated only if the merge object is in one of the following statuses:

- Not Started
- Merge Failed
- Merge Completed
- Realignment Failed

For detailed troubleshooting information for customer merge, see the section - **Customer Merge FAQs**.

Related Information

Merging Marketing Permissions [page 212]

28.2.2.2 Configure Realignment of Closed Transactions of Merged Records

By default, the account merge fetches all open transactions of merged or obsolete records. If you need to also fetch closed transactions, you must maintain the required configuration.

Administrators can maintain the configuration to include or exclude closed transactions of obsolete records in account merge. To do this, go to ▐▶ *Business Configuration* 〉 *Implementation Projects* ▌. Select your project and navigate to ▐▶ *Edit Project Scope* 〉 *Questions* 〉 *General Business Data* 〉 *Business Partners* 〉 *Handling of Business Partners* 〉 *Business Partner Merge* ▌ and select the scoping question: *Do you want to enable enhanced document realignment during account merge?*

28.2.2.3 Implement Business Add-In To Control Copying Address Lines During Merge

Use the new business add-in in SAP Cloud Application Studio to turn off address copy from duplicate to the master record during the merge process. With this BAdI, you can also control what address lines of obsolete records be copied to or excluded from the primary record.

The method `CONTROL_MERGE_LOGIC` is included in the enhancement option - `CustomerMergeControl` In this method, set the `SkipAddressCopyToMaster` = *True*.

- Import Parameter: InputData of type BadiCustomerMergeControlInput
- Export Parameter: BadiCustomerMergeControlResult
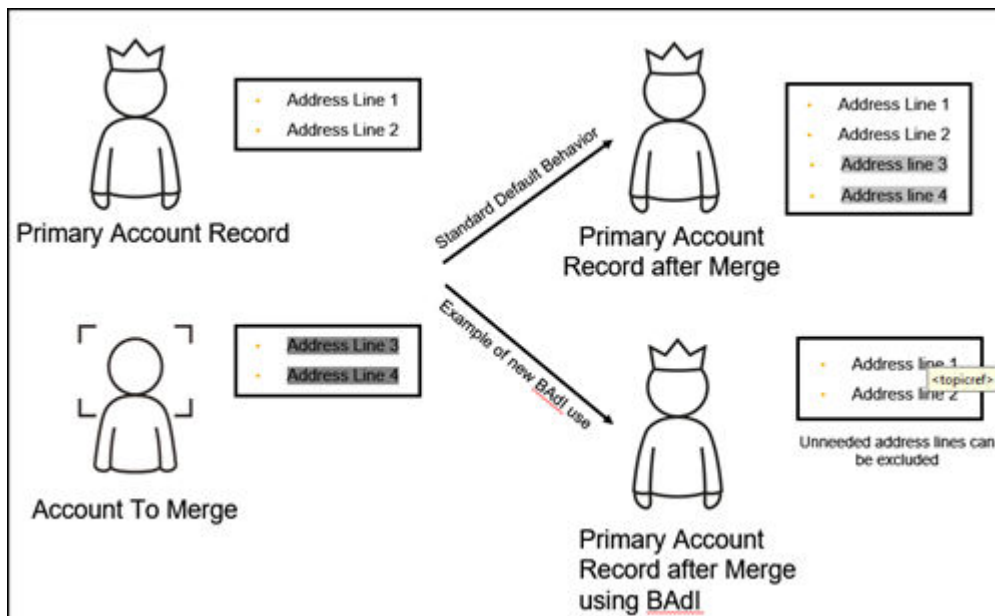
28.2.3 Differentiate Between Standard Change and Merge Context

Administrators can now differentiate between updates to an account triggered by merge or by standard change process. This differentiation can be implemented using custom logic such that the custom logic is executed only for change instances occuring due to merge.

Use business partner utility - `AP.FO.BusinessPartner.Globalnamespace BusinessPartnerUtilities.IsBusinessPartnerMerge`o implement this custom logic. This utility is provided for the standard Business Partner business object provided by SAP and is available in SAP reuse library.

28.2.4 Status Management in Account Merge

Accounts assume various statuses during customer merge. Find detailed information on these statuses in this topic.

Statuses and Descriptions

Status	Description
Not Started	This is the initial status and is set when the Merge object is created and Merge process has not yet been triggered.
Merge In Process	This is the status when the merge has been triggered either from the web service call or manually from the UI. This status indicates that merge process has started.
Merge Failed	This is the status when the merge operation of merging source and replica record has failed. The system will not attempt any transaction reassignment in case the merging of duplicate records has failed.
Merge Completed - Realignment In Process	This is the status when the merge of two customers has been successfully completed and the re-parenting of transactions assigned to the duplicate record to source record has started.
Merge Completed - Realignment Failed	This is the status when the merge of two customers has been completed and the reassignment of transactions has failed.
Realignment Completed – Enhanced Realignment In Process	This is the status when the merge of two customers has been successfully completed and the enhanced re-parenting of transactions assigned to the duplicate record to source record has started (only available if 'Realignment of Closed Transactions of Merged Records' is configured – see below).

Status	Description
Realignment Completed – Enhanced Realignment Failed	This is the status when the merge of two customers has been completed and the enhanced reassignment of transactions has failed (only available if 'Realignment of Closed Transactions of Merged Records' is configured – see below).
Completed	This status signifies that customer merge and reassignment of transactions has been completed without any errors.

28.2.5 Map Obsolete Records to Primary Record For More Insights

Use insights from closed transaction history of obsolete records event without including closed transaction history in account merge. This way you can leverage reporting to show complete picture of primary account.

The new datasource - *Account Merge Master Link* allows you to map primary record to obsolete records and thus allows closed transaction history to be reported along with all other activities of primary record.

28.2.6 View Result Log

The *Result Log* screen displays the application logs that are created by the system for each merge transaction.

The logs are displayed in a hierarchy. Click on the hyperlinked *Application Log ID* to see if the merge execution resulted in errors, warnings or other information messages.

The Results section of the application log also displays for the errors, the reason why the transaction reassignment failed. Re-trigger the merge using the *Initiate* action available on the customer merge list view.

28.3 Contact Team

Maintain a contact team and assign employees to a contact team.

You can maintain a contact team for a contact. As a sales representative, you can also upload your contacts. Your contacts can be secure because all users can only access their contacts. You can also assign employees to a contact in the *Contact Team* screen and assign an employee as the main contact in the team. (this feature is subject to available authorizations). Your administrator can use the standard business partner migration template object to migrate contact team members.

28.3.1 Configure Contact to Employee Assignment

Administrators can configure contact to employee assignment. Directly assign contacts to employees in the *Contacts* detailed view. You can also assign a main employee responsible for the contact. The standard query *My Contact* has been enhanced to consider the direct contact-employee assignment.

The following configuration must be maintained to enable the employee - contact assignment:

- To enable access restrictions based on contact employee assignment, go to ▌▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▌▶ *Edit Project Scope* ❭ *Questions* ❭ *Built-In Services and Support* ❭ *User and Access Management* ❭ and select the scoping question: *Do you want to restrict access rights for contacts using Contact Team Relationship?*
- If the above scoping question is enabled and if the business role is configured to have access restrictions for contacts, then all the access rules with employee reference will always refer to contact team assignment for contact employee restrictions.
- All other access rule references will be derived from the account assigned to the contact (for example territory, sales area and so on.).

28.4 Maintain International Address Versions for Contact-Account Relationships

Maintain international address versions for contact-account relationship attributes. It is also possible to replicate them from / to SAP ERP and SAP S/4HANA. In the *Relationships* tab for contacts, select the row and use the toolbar action *Maintain International Version* to maintain the address version.
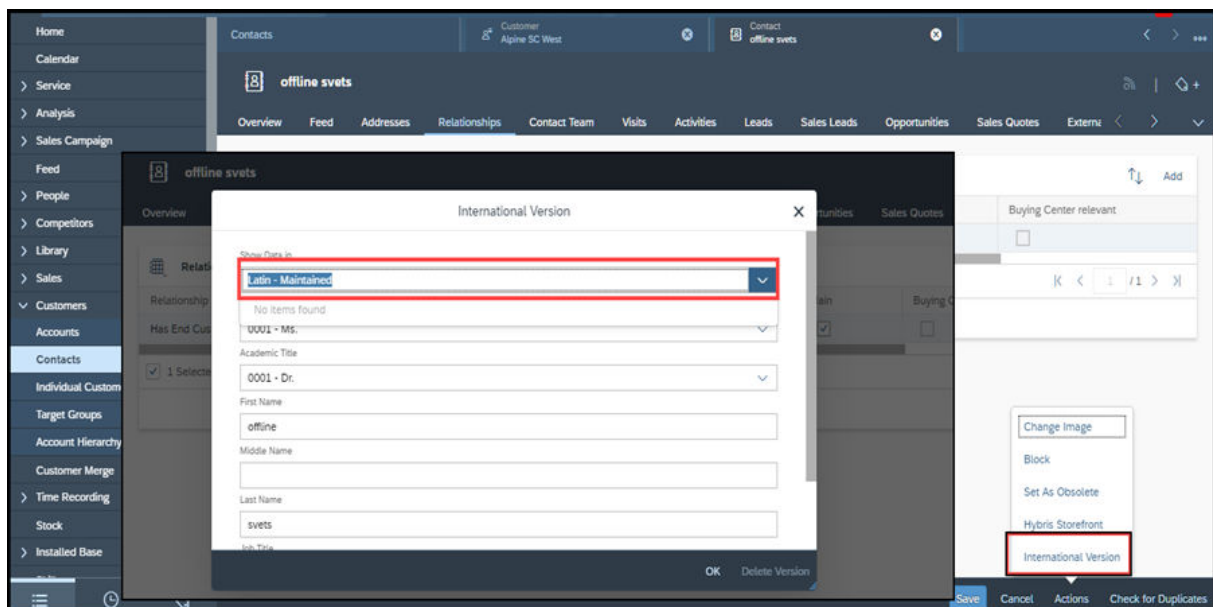
> **i Note**
>
> The scripts for these address versions must already be maintained for the related account. For example, to add Hebrew address versions for a contact-account relationship, the Hebrew version must already be maintained for the account.

28.5 Contact Relationships and Buying Center Relationships

Maintain different relationships that contacts may have with your accounts.

Each contact may have different relationships with accounts. You can create different contacts to represent these different relationships using the relationship types. Further, you can also maintain buying center relevant information for contacts. Your administrator must have maintained the buying center configuration. The administrator can use the configuration to define hierarchical or non-hierarchical relationships contact-to-contact or contact-to-employee relationships.

Contact relationships define the nature of a contact. They represent relationships between contacts, accounts as well as with other business partners such as partners and partner contacts. Use the relationships that you have configured to assign relationship between Accounts, Contacts, Partners, Partner Contacts and so on based on your business needs.

Usually, relationship types are bi-directional, such as *Is a Contact* and so on. Standard relationship types are configured in the cloud solution; You can also create custom-defined relationship types and maintain them for sales areas.

28.5.1 Configure Relationships Including Buying Center

Administrators can configure relationships including buying center.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Open Activity List* ❯ *Fine-Tune* ❯ *General Business Partners* ❯.Under *General Business Partners*, define the possible relationships between business partners in your system. The standard solution provides relationship codes that you can use. Choose to define new relationship codes or even disable the standard codes. Note that certain standard relationship codes cannot be deactivated.

Enter a code for and the name of the relationship along with a description for both directions of the relationship, such as Has Contact for the relationship of business partner 1 with business partner 2 with business partner 1 being an organization. Depending on the relationship type, choose whether the business partner is a person or an organization, and select the business partner roles that are permitted for each of the business partners in the relationship.

Assign Relationships to Party Role in Party Role Definition

You can also link the relationships you define to party role in involved party. Do this, for example, if you want to automatically determine the party role in documents like lead, opportunity, sales quote, activities based on specific relationship.

Example: define a new custom Party Role "Reseller" that has the relationship "Has an OEM" assigned to it.

Sales Area Based Relationships

Configure sales area dependent relationships that are evaluated during transactions involving the accounts.

28.6 Buying Center

Buying center refers to all those members of an organization who are key stakeholders and are involved in the buying process.

Use buying center to collaborate with accounts and contacts using various channels. In the *Buying Center* tab, map key stakeholders (involved in buying process) along with their relationships. Information that you create here is copied for opportunities.

28.6.1 Configure Buying Center

Administrators can configure buying center based on business partner and buying center relationships..

Enable Buying Center based on Business Partner Relationships

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ◼. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Sales* ❯ *Account and Activity Management* ❯ *Account Management* ◼ and select the scoping question: *Do you want to enable buying center based on business partner relationships?*

Enable Buying Center based on Buying Center Relationships

Go to ▌▶ *Business Configuration* ❭ *Implementation Projects* ❭. Select your project and navigate to ▌▶ *Edit Project Scope* ❭ *Questions* ❭ *Sales* ❭ *Account and Activity Management* ❭ *Account Management* ❭ and select the scoping question: *Do you want to enable buying center based on buying center relationships?*

28.7 Attributes

Attributes can be attached to an object to define additional characteristics of the objects. In the solution, attributes can be associated with different objects like account, contact, individual customer and so on.

Attributes can be of different data types and can by grouped together into an attribute set. You can set different properties of an attribute like negative value allowed, intervals allowed, multi-value allowed and so on.

A very common use of attributes is to create target groups. For example, if you are a credit card company and want to create a target group for customers traveling internationally, then you can create an attribute named as International traveler with a value list YES or NO. Every time your customer spends some money outside your country using your card you can automatically update International traveler as YES. Subsequently, you can create a target group of customers where the value of attribute International traveler is YES and send them promotions like low exchange rate for international traveler or low interest rate if they buy ticket through your company using your credit card.

> **i Note**
>
> Attributes are available in HTML and Responsive UI, in both online and offline mode.

28.7.1 Configure Attributes

You can define attributes or attribute sets and make them visible for users in the advanced searches for accounts, contacts, and individual customers.

Define Attributes and Attribute Sets

Administrators can configure attributes.

Go to ▌▶ *Administrator* ❭ *Sales and Campaign Settings* ❭ *Attributes* ❭ to view and configure attributes or attribute sets.

> **i Note**
>
> If your solution is integrated with SAP Customer Relationship Management (SAP CRM), then you can only view, but not create or modify, attributes or attribute sets from this screen.

As you maintain attributes, you can configure their characteristics (for example, whether they are mandatory), their value list and their descriptions in one or more languages. As you maintain attribute sets, which represent combinations of attributes, you can select the *Person-Relevant* checkbox to make the attributes visible in the *Attributes* tab of the *Contacts* work center view. You can also select the *Organization-Relevant* checkbox to make them visible in that tab on the *Accounts* or *Individual Customers* work center views.

Enable Search using Attributes

Provided if you personalize your solution to make it visible, you can enable your users to access the *Attributes* field within the advanced search of accounts, contacts and individual customers and maintain conditions there that influence the corresponding search behavior. Once this field is visible and your users select it to maintain conditions, they can specify a combination of attribute sets, attributes, operators and values – for example, Employee Attributes, Region, Equal, and North America, respectively – to apply to the attributes search. Users can also specify additional attribute conditions with the logical operator OR. Once these parameters have been saved, users can apply the associated conditions as an advanced search query to find business partners with corresponding Attributes, and to display them within the attributes tab of the work center view of the associated business partner.

Display in Account Summary

From the item details of an account, when you choose the [Summary] function, Attributes for the account now appear within the resultant account summary.

> **i Note**
>
> This enhancement only becomes available once you select ▐▶ *Administrator* ❯ *Form Template Maintenance* ❭ and then choose the *Account Summary* form template and revert to the most recent version.

Access Restrictions

You can configure the business roles in your solution to specify business access restriction BUSINESS_ATTRIBUTE_ASGNM_READ, thereby making attributes read-only for the associated business users

Attribute Data Source

You can use the new report Business Partner with attribute assignment, whose technical name is `CODBUSATTRBPB_Q0001`, to specify search criteria related to Attributes and to find corresponding business partners. Within this report, you can also right-click on the name of a business partner, then choose *Export All Account* and Contacts to New Target Group, to create a target group for the associated accounts and contacts.

Use in Analytics

To drive analytics in relation to attributes, you can use the following new data sources:

Data Sources for Attributes

Data Source ID	Data Source Name	Description
CODBUSATTRBPB	*Business Partner with Attribute Assignment*	Shows all Attribute values assigned to the reference business partners.
❖ **Example** CODBUSATTRGENB	*Attribute Assignment*	Contains all Attributes values assigned to the reference business objects.

28.7.2 Configure Marketing Permissions

Administrators can configure marketing permissions. With the communication categories, you can specify how often a customer can be contacted during a certain period of time.

In the *Marketing Permissions* fine-tune activity, you maintain your communication categories and the communication channels for countries/regions with an explicit opt-in. These settings are required to track whether your customers opt-in or opt-out for a specific communication channel.

Go to ▌▶ *Business Configuration* ❯ *Implementation Projects* ▐. Select your project and navigate to ▌▶ *Open Activity List* ❯ *Fine-Tune* ▐ and then select the *Marketing Permissions* activity from the activity list.

1. Maintain Communication Channels for Countries/Regions with an Explicit Opt-In:

   > ⚠ **Caution**
   >
   > It's the responsibility of your organization to comply with national legislation regarding data protection and the provision of marketing materials. Therefore, administrators must configure the solution for each country/region in which, or each customer with whom, your organization intends to conduct marketing activities and, to the extent legally required, make use of the option to store documents such as opt-in or opt-outs.

   To add a country/region where an explicit opt-in is required, click *Add Row*, enter the country/region and the corresponding communication channel, such as e-mail, letter or fax, and save your changes.

2. Maintain Communication Categories:
   1. To create a communication category, click *Add Row*
   2. Enter a communication category, a description, a limit, and the time frame. With the limit and time frame, you can specify how often a customer can be contacted during a certain period of time. When adding communication categories, we recommend starting with the letter Z
   3. Save your work.

28.8 Social Media Profiles

Maintain social media profiles for individual customers.

Use social media for your individual customers to:

- Create social profiles of individual customers.
- Track both inbound and outbound social media interactions from the *Social Media Message* tab.
- In **Cloud for Service**, use social media channels to work with customers.

For more information, see Enabling Social Media Features.

28.8.1 Enable Social Media Features

Expose the hidden social media features available in your solution.

Your SAP Cloud for Social Engagementsolution is delivered with the social media features available but hidden. As an administrator, you need to enable the social media features of the solution using *Adaptation Mode*.

1. To enter adaptation mode click *Adapt*, then choose *Enter Adaptation Mode*.
2. Navigate to each of the screens listed below and make the screen edits indicated for each.
   1. When you're on the screen you want to edit, click *Adapt*, then choose *Edit Screen*.
   2. Add or remove elements on the *Screen Layout* tab.
   3. Save your changes.
      You can test your changes before publishing.
   4. When you're finished with your changes you can publish them to make them visible to all users.

Screens to Edit for Enabling Social Media Features

Screen	Navigation	Edits	Notes
Service and Social Settings	▶ *Administrator* ❯ *Service and Social Settings* ❯	Under *Sections*, check the box for *Social Media* to make it visible.	You need to make this change before you can set up any social media channels in your system.
Individual Customers	▶ *Customers* ❯ *Individual Customers* ❯	Under *Fields*, check the box for *Social Media Profile* to make that column visible in the list.	

Screen	Navigation	Edits	Notes
Individual Customer	▶ *Customers* ❯ *Individual Customers* ❯ then choose a customer to open the details screen	• Under *Sections*, check the box for *Social Information* to make it visible. With *Social Information* selected, under *Fields*, ensure the boxes are checked for *Facebook* and *Twitter*. • Under *Sections*, select *Tabs*, then in the lower list, select *Social Media Messages* and *Social Profiles*.	You need to have at least one customer record in the system before you'll be able to adapt the details screen.

Related Information

Adapting the User Interface ↗

28.9 Integration with LinkedIn Sales Navigator to Access Relationships and Key Contacts

Find a new section - *LinkedIn Sales Navigator* in the *Overview* tab and *Contacts* tab for accounts and contacts and in the buying center. Click *Sign-In* in this section to navigate to linkedIn to find relationships and key contacts. Use the rich LinkedIn profile data to record activities with prospects and customers, view recent activities of your contacts and find a topic of interest to help you start a conversation with your prospects.

The LinkedIn Sales Navigator uses basic information such as first name, last name, email address, job title, and company name to find the correct company or person on LinkedIn. You can also perform a search if you are unable to find appropriate contacts or customers. For your contacts, the *Save as Lead* option in the widget allows you to save the person as a lead in the LinkedIn Sales Navigator. Such leads are not recorded in SAP Cloud for Customer. In addition to basic information mentioned above, there is no further data exchange between SAP Cloud for Customer and LinkedIn.

To use this feature, you need to:

• Use a standard LinkedIn account.

> **i Note**
>
> If you have signed in to LinkedIn with a different account, you are automatically signed in with that account. To re-login with the standard account, first clear your previous browsing cookies.

- Enable browser cookies:
  - For Google Chrome, go to ▶ *Settings* 〉 *Advanced* 〉 *Privacy and security* 〉 *Content settings* 〉 *Cookies* 〉 *Allow* ⌉ and add `[*.]linkedin.com`
  - For Internet Explorer, go to ▶ *Internet Options* 〉 *Security* 〉 *Trusted sites* 〉 *Sites* ⌉ and add `http://linkedin.com`
- Select the relevant mashup using personalization.

28.9.1 Configure LinkedIn's Sales Navigator

Administrators can enable Sales Navigator to allow users to look up LinkedIn information of an account or a contact.

> **i Note**
>
> Sales Navigator Enterprise licenses are required from LinkedIn to use this feature.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* ⌉. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Communication and Information Exchange* 〉 *Integration with External Applications and Solutions* 〉 *Integration with LinkedIn Sales Navigator* ⌉ to find the corresponding scoping question.

29 Partner Management

Partners in the SAP Cloud for Customer system refers to individuals who are associated with the resellers, brokers, service providers, distributors, or other entities with which your organization collaborates.
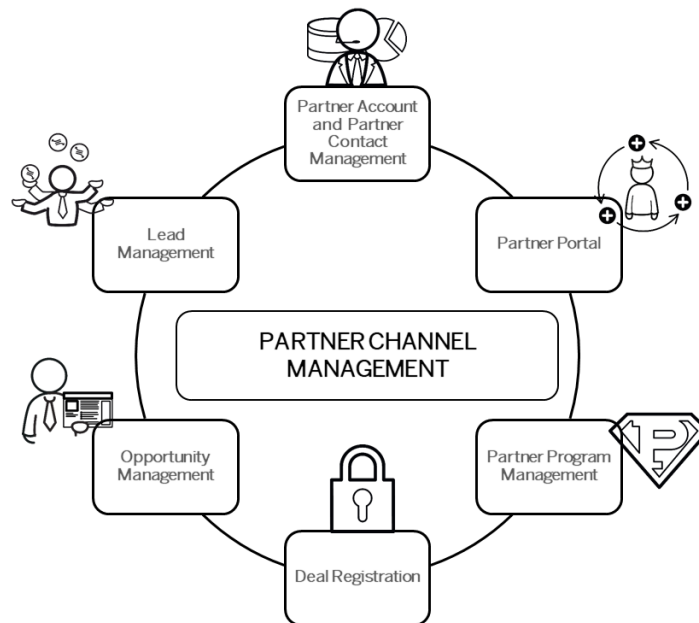
The SAP Cloud for Customer system offers following feature possibilities for partners:

- Partner Channel Management that offers a whole lot of possibilities to set-up business and communication channels with your partners.
- Partner Portal that enables channel partners to design a new generation user experience that they can use collaborate on critical opportunities.
- *Partners* work center that facilitates the exchange of information between members of your organization with partner contacts. In the *Partners* work center, you can:
  - Maintain and manage partner and partner contacts
  - Create, edit and mass upload partner and partner contact details
  - Assign partner program and partner type to partners
  - Configure and assign relationships between partners and accounts so that partners are automatically determined in business transactions.

> i Note
>
> All accounts, customers, employees, contacts, partners and competitors are considered as business partners in the system. Therefore, all functions that are common to business partners are applicable to them.

29.1 Scope and Configure Partner Data

Following topics discuss the configuration possibilities for partner data.

29.1.1 Configure Partner ABC Classification

Administrators can maintain partner ABC classification.

Go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Open Activity List* ❯ *Partners* ❯ *Maintain Partner ABC Classification* ❯.

29.1.2 Enable Partner Channel Management

Administrators can enable Partner Channel Management.

To do this, go to ▶ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▶ *Edit Project Scope* ❯ *Questions* ❯ *Partner Channel Management* ❯ *Partner Management* ❯ *Partner Program Management* ❯ and scope the following questions:

- Do you want to migrate funds management data?
- Do you want to migrate loyalty management data?
- Do you want to migrate partner programs?
- Do you want to migrate partners?

> **i Note**
>
> Following data migration and upload templates are available to support the above scoping questions:
>
> - Partner, Partner Contact with addresses
> - Partner Program and Partner Product Dimensions
> - Marketing Funds (summary level)
> - Loyalty Management (summary level)

The above scoping questions capture the following features of the solution: partner funds management information, partner loyalty points, partner programs and partner types.

29.1.3 Configure Assignments and Access Restrictions

As an administrator, use following assignments to configure access restrictions for partners and partner contacts:

- Organizational unit and business roles
- Territories and accounts
- Transactions such as leads, opportunities, activities, quotes, orders, service tickets and so on.

Restriction Rule - Partner of Partner Contact

Configure business roles with access restriction rule - *Partner Contact of Partner* to enable partner contacts share objects or transactions with other partner contacts within a partner organization. This configuration does not require any further territory or org. assignments.

Currently this restriction rule is available for access contexts **1015** and **1016**. It is possible to restrict all master data and transactional work center views with 1015 (Employee, Territory, Account, Sales Data) and 1016 (Employee, Territory, Account, Sales Data).
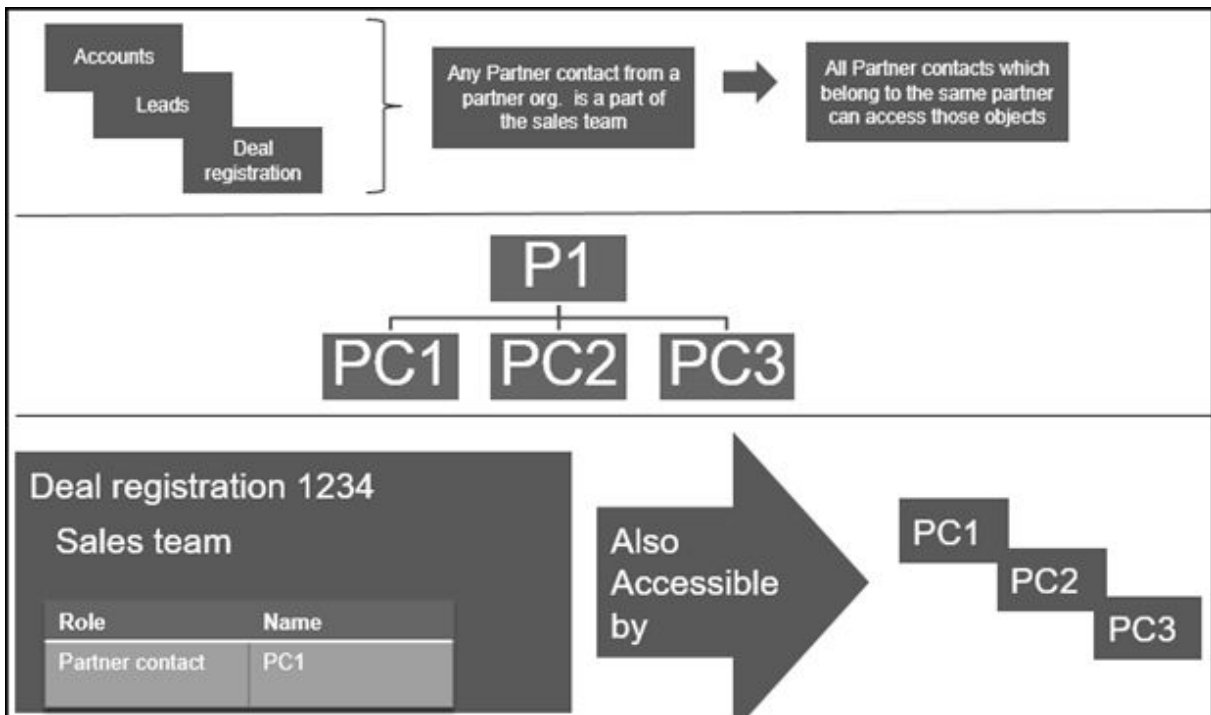
29.1.4 Configure Business Partner Types

As an administrator, you can configure business partner types.

Go to ▮▶ *Business Configuration* ▶ *Implementation Projects* ▮. Select your project and navigate to ▮▶ *Edit Project Scope* ▶ *Questions* ▶ *Sales* ▶ *Account and Activity Management* ▶ *Account Management* ▶ *Business Partner Types* ▮ and select the scoping question: **Would you like to manage partners, such as resellers, in your system?**. This selection allows you to choose partners and partners contacts to manage business relationships with partners (such as resellers) and their contacts.

29.1.5 Configure Partner Programs

Administrators can configure the various partner programs listed below. Go to ▐ *Business Configuration* ❯ *Implementation Projects* ❯. Select your project and navigate to ▐ *Fine-Tune* ❯ *Partner Channel Management* ❯ *Partner Management* ❯ *Partner Program Management* ❯ *Partner Programs* ❯, and define the following:

- Codes for partner programs
- Business codes for partner portal
- Tier-level codes for partner programs
- Codes for partner types
- Number ranges for partner programs

29.1.6 Configure Address Type Ahead Search

Administrators can configure address type ahead search using standard microservices from SAP Cloud Platform.

Prerequisite

When you purchase a license for the microservice, you are assigned a **Request URL** to access SAP DQM micro services. The URL is unique to your data center on SAP Cloud Platform and is required to activate integration with the SAP Cloud for Customer. You can access this URL under ▐ *SCP Cockpit* ❯ *Services* ❯ *Data Quality Services* ❯ *Application URL* ❯. Copy *Address Cleanse URL* under *Available endpoints* to a notepad on your local machine. You assign this URL when configuring the integration in your cloud for customer system.

> **i Note**
>
> Do not use the URL under *Available endpoint when using client certificates*.

Configuration in SAP Cloud Platform

Generate OAuth 2.0 Client IDs and Token Values to configure in SAP Cloud Platform. For detailed documentation on generating OAuth 2.0 certificate to SAP Cloud Platform, see OAuth 2.0 Authorization.

Steps for Configuring Microservice for Address Type Ahead Search in SAP Cloud for Customer

1. Enable the scoping question as follows:
   1. Go to ▌ *Business Configuration* ❯ *Implementation Projects* ❙.
   2. Select your project and navigate to ▌ *Edit Project Scope* ❯ *Questions* ❯ *Built in Services and Support* ❯ *Business Environment* ❯ *Addresses and Languages* ❙.
   3. Select the scoping question: *Do you want to use the address type ahead search functionality?*
2. Configure Mashup Web Services
   There are two mashup web services need to be configured.
   1. *DQM Address Type Ahead* mashup service:
      1. Go to ▌ *Administrator* ❯ *Mashup Web Services* ❙.
      2. Select the pre delivered service (SW00095) and *Copy* the template to create new service.

         > ℹ Note
         >
         > Under *General Information*, retain the *Service Name* and *Description* as it is.

      3. Under *Service Information*, update the necessary fields as:
         - *Authorization Method*: OAuth
         - *HTTP Method*: Post
         - *URL*: Maintain the Token Endpoint URL that is provided in OAuth settings from SAP Cloud Platform.
         - Enter the *Consumer Key* and *Consumer Secret* that you have created during OAuth settings.

           > ℹ Note
           >
           > Ensure that you retain the other fields as it is.

      4. Click *Save* and *Activate*.
   2. *DQM Address Type Ahead Endpoint* mashup service:
      1. Go to ▌ *Administrator* ❯ *Mashup Web Services* ❙.
      2. Select the pre delivered service (SW00094) and *Copy* the template to create new service.

         > ℹ Note
         >
         > Under *General Information*, retain the *Service Name* and *Description* as it is.

      3. Under *Service Information*, update the necessary fields:
         - *Authorization Method*: OAuth
         - *HTTP Method*: Post

      ○ *URL*: Maintain the *Address Cleanse URL* from *Available endpoints* list in SAP Cloud Platform.

> **i Note**
>
>   ○ Do not use the URL from *Available endpoints* when using client certificates list in SAP Cloud Platform.
>
>   ○ Ensure that you retain the other fields as it is.

  4. Click *Save* and *Activate*.

> **i Note**
>
> Maintain only one mashup for Token and Service. Multiple mashups for the same will create inconsistency.

Billing for DQM Service for Address Type Ahead Search

The street address type ahead search is enabled by scoping question for each SAP Cloud for Customer to SAP DQM micro service call. The following considerations apply as part of the address type ahead search service:

- Street address type ahead search is considered as two different transactions by DQM service.
- Street and post office box addresses within the same address type ahead search transaction are considered separately.

For detailed information on billing for these API calls, refer to Billing/Usage Information (Per API Call).

Additional Information

For detailed information on enabling and configuring DQM Microservices, see the documentation under Data Quality Management, microservices for location data (DQM microservices).

29.2 Partner Channel Management

Use Partner Channel Management (PCM) solution to work together with partners allowing closer collaboration.

If your solution includes integration with the SAP HANA Cloud Portal, you can make partner channel management available in the partner portal.

Partner Channel Management (PCM) allows you to manage partner relationships to optimize channel operations for sales and service related processes. To achieve this, you can onboard partners and provision access to the SAP Cloud for Customer for the partner contacts. Once onboarded, an active collaboration can be set-up between the vendors and partners including content management. Use the analytics to manage channel partner relationships throughout the partner life cycle.

Highlight of the collaboration is the partner led lead management and deal registration as well as approval process for sales. Also use PCM in managing tickets with service partners.

Example

Social Opportunity Management: A sales manager uses the Deal Room work pattern to collaborate with sales team from SAP Cloud for Customer, with a goal to win a sales opportunity.

Deal Registration [page 1176]
> Deal registration on partner portal enables channel partners to work with leads and opportunities in sync with and without conflict with other partners.

Collaborate using SAP JAM [page 1180]
> Bring your partners on a single collaboration platform to increase partner engagement and loyalty. Use dedicated communities to connect with your partner contacts to exchange ideas, collaborate and deliver superior content.

Related Information

Scope and Configure Partner Data [page 1171]
(Deprecated) Partner Portal for Partner Channel Management [page 1180]

29.2.1 Deal Registration

Deal registration on partner portal enables channel partners to work with leads and opportunities in sync with and without conflict with other partners.

To enable users to use the deal registration feature, you must ensure that,

- Your business users are authorized to access the ▌ *Sales* ❯ *Deal Registration* ▐ work center view, where deals are managed.
- The corresponding master data for partner contacts, products, pricing and so on are available in your solution.

```
┌──────────────┐     ┌──────────────┐     ┌──────────────┐     ┌──────────────┐
│  Submit Deal │────▶│ Review Deal  │────▶│    Find      │────▶│ Approve Deal │
│ Registration │     │ Registration │     │  Duplicates  │     │ Registration │
└──────────────┘     └──────────────┘     └──────┬───────┘     └──────┬───────┘
                                                 │                    │
                                                 ▼                    ▼
                                          ┌──────────────┐     ┌──────────────┐
                                          │ Reject Deal  │     │ Convert Deal │
                                          │ Registration │     │ Registration │
                                          └──────────────┘     │     to       │
                                                               │ Opportunity  │
                                                               └──────────────┘
        ┌──────────────┐     ┌──────────────┐     ┌──────────────┐
        │ Assign Sales │────▶│     Send     │────▶│ Manage and   │
        │    Team      │     │ Notification │     │    Close     │
        └──────────────┘     └──────────────┘     │ Opportunity  │
                                                  └──────────────┘
```
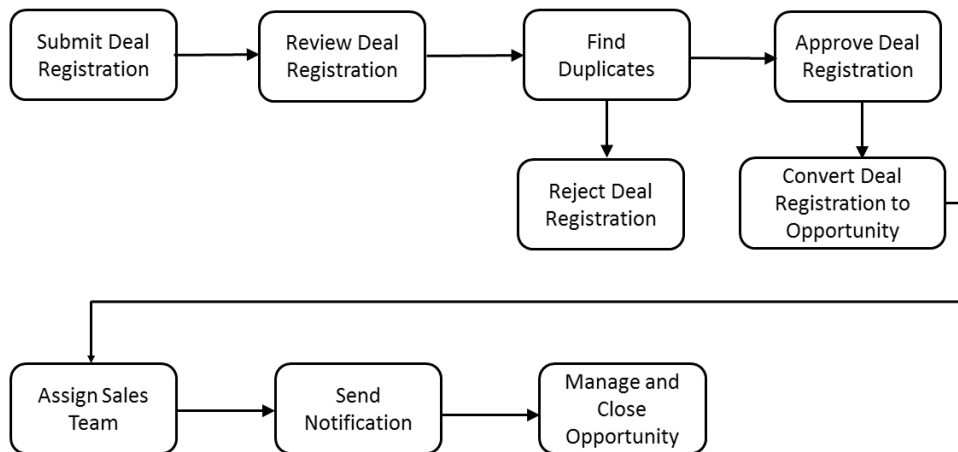
Partner contact creates and submits prospective deal

Once deal registration is active in your solution, the partner contact creates and submits a prospective deal, as follows.

1. The partner contact logs on to the solution.
2. The partner contact chooses ▌ *Sales* ❯ *Deal Registration* ▐.
3. On the following screen, the partner contact chooses *New*.
4. All required information is entered.

> **i Note**
>
> If desired, the partner contact can select the *Use Existing Account* option to assign the deal to a prospect that already exists in your solution.

5. In the *Status* field, the partner contact specifies one of the following entries:
   - *Draft*, allowing the deal to be finalized later, or
   - *Submitted*, causing the deal to be routed to the brand owner for consideration
6. The partner contact saves the deal.

> **i Note**
>
> If the partner contact has submitted the deal, then he or she cannot edit it again, unless the brand owner assigns it *Draft* status at a later time.

Brand owner considers submitted deal

Once the prospective deal is submitted, the brand owner considers it, as follows.

1. The brand owner logs on to the solution.
2. The brand owner chooses ▎ *Sales* ❯ *Deal Registration* ▎.
   By default, all deals are displayed.
3. Choosing the *Grouped Deals* filter, the brand owner views prospective deals grouped by end customer, product and end date.
4. The brand owner opens any deal in *Submitted* status.
5. On the next screen, in the *Status* field, the brand owner specifies one of the following entries:
   - *Draft*, if the deal is to be returned to the partner contact for revisions to occur, or
   - *In Review*, if the deal is to undergo customer aliasing and potentially receive acceptance
6. The brand owner saves the deal.

Brand owner performs customer aliasing

Once the prospective deal is in review, the brand owner determines whether to create a new account for the prospect, or to assign an existing account to it, as follows.

1. The brand owner opens any deal to which the status *Submitted* or *In Review* is assigned.
2. The brand owner chooses ▎ *Actions* ❯ *Convert to Account* ▎.
   If duplicate checks for business partners are active in the system, potential duplicates are displayed.
3. To complete customer aliasing, the brand owner performs one of the following actions:
   - Clicks on the link of the potential duplicate business partner to assign that account to the deal, or
   - Saves the prospect associated with this deal to complete its conversion into an account.
     In response, the account information is assigned to the deal.

Brand owner accepts deal

If the brand owner decides to accept the deal, the following steps occur.

1. The brand owner opens any deal to which the status *In Review* is assigned.
2. The brand owner modifies the status from *In Review* to *Accepted*, enabling it to be converted to an opportunity, when applicable.
3. The brand owner saves the deal.

Brand owner converts deal to opportunity

Once the brand owner is satisfied with the accepted deal and wants to convert it to an opportunity, the following steps occur.

1. The brand owner opens any deal to which the status *Accepted* is assigned.
2. The brand owner chooses ▶ *Actions* ❯ *Convert to Opportunity* ◗.
   In response, the deal is converted to an opportunity.
3. The brand owner saves the deal.
   In response, the status *Converted* is assigned. Neither the partner contact nor the brand owner can edit the deal further, for it has become an opportunity.

29.2.1.1 Enable Deal Registration

Administrators can enable deal registration in the business configuration.

Deal Registration

To make the ▶ *Sales* ❯ *Deal Registration* ◗ work center view visible in your system and thereby enable authorized users to manage deals, you, as an administrator, select the checkbox of the scoping setting ▶ *Sales* ❯ *Deal Management* ❯ *Deal Registration* ◗.

Deal Registration

In fine tuning, you, as an administrator, add the *Deal Registration* activity, then edit the activity to define the engagement type codes — for example *Co-Sell*, or *Re-Sell* — and to determine the questions that channel partners will answer when they submit prospective deals. If you are not satisfied with these pre-delivered questions, then you can edit or delete them, as desired, or add new ones.

29.2.1.2 Configure Reports for Deal Registration

Administrators can configure and use the reports for deal registration. These reports offer you more insight about deal conversion rate, deal items by product, and deals by status are available, along with new data sources related to deal registration.

The following reports are delivered:

1. Deal Conversion Rate - Last 12 Months, whose technical name is `CODDEALU_Q0001`, displays the rate of conversion of deals to opportunities in the last 12 months
2. Deal Items by Products, whose technical name is `CODDEALI_Q0001`, displays the distribution of deal items by products.
3. Deals by Status, whose technical name is `CODDEALH_Q0001`, displays the distribution of deals by status.

The following data sources are also available:

Data Sources for Deal Registration

Data Source ID	Data Source Name	Description
`CODDEALU`	Deal Registration Funnel	Contains all deal registrations and their related objects.

Data Source ID	Data Source Name	Description
CODDEALHB	Deal Registration Header Details	Contains the deal registration document's header information.
CODDEALIB	Deal Registration Item Details	Contains the deal registration document's item information

29.2.1.3 Configure Depersonalization in Deal Registration

The depersonalization function allows you to remove personal data from a business object to ensure compliance with the applicable data protection requirements.

Depersonalization is only available for users with access to the *Data Protection and Privacy* work center.

In deal registration, depersonalization triggers a deletion. Once a deal registration is depersonalized, you can go to ▌ *Administrators* ❯ *General Settings* ❯ *Data Management* ❯ *Deleted Data* ▌ to view the deleted record. You cannot depersonalize a deal registration if it contains a person that is blocked for removal.

In case you need to retain certain information, you can download relevant data using OData or Data Workbench prior to depersonalization.

29.2.2 Collaborate using SAP JAM

Bring your partners on a single collaboration platform to increase partner engagement and loyalty. Use dedicated communities to connect with your partner contacts to exchange ideas, collaborate and deliver superior content.

29.3 (Deprecated) Partner Portal for Partner Channel Management

> i Note
>
> The entire section for Partner Portal documentation is deprecated. The partner portal is powered by SAP Cloud Platform. See the topic **Integration Landscape for Partner Portal** in this chapter.

About Partner Portal

The partner portal enables channel partners to design a new generation user experience that they can use collaborate on critical opportunities. Use partner portal to:

- Self-register as a new partner.
- Invite new partner employees.
- Maintain partner contact details.
- Add and track leads and opportunities.
- Manage tasks and appointments.
- Access import content, channel enablement tools and resources.

Partner Portal Integration Landscape [page 1181]
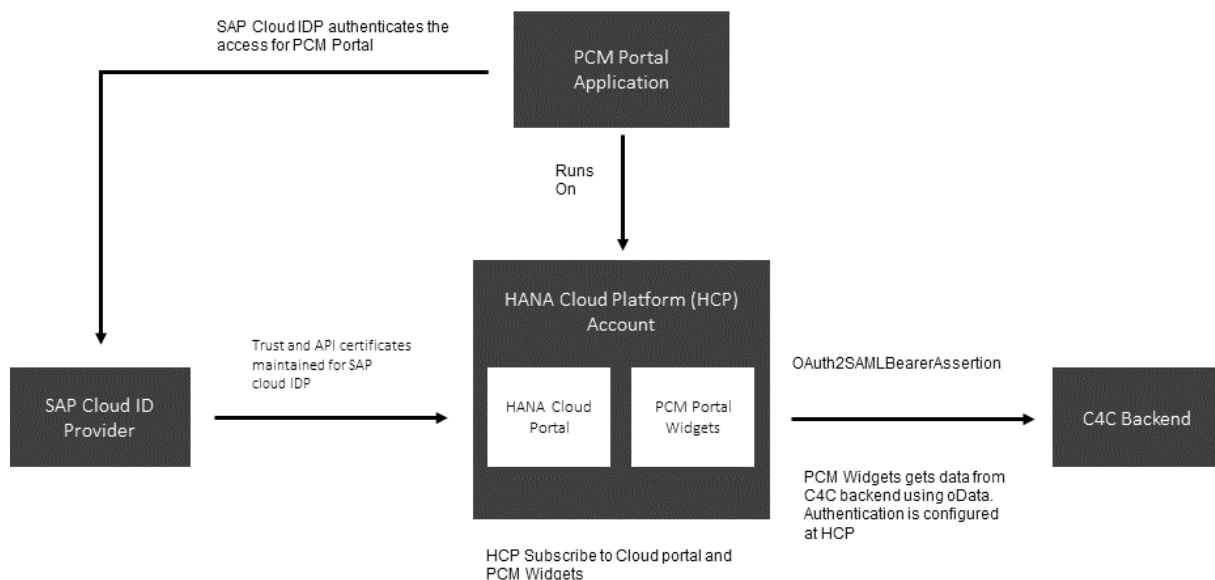   Landscape details for the partner portal set-up.

Partner Registration and Onboarding [page 1182]

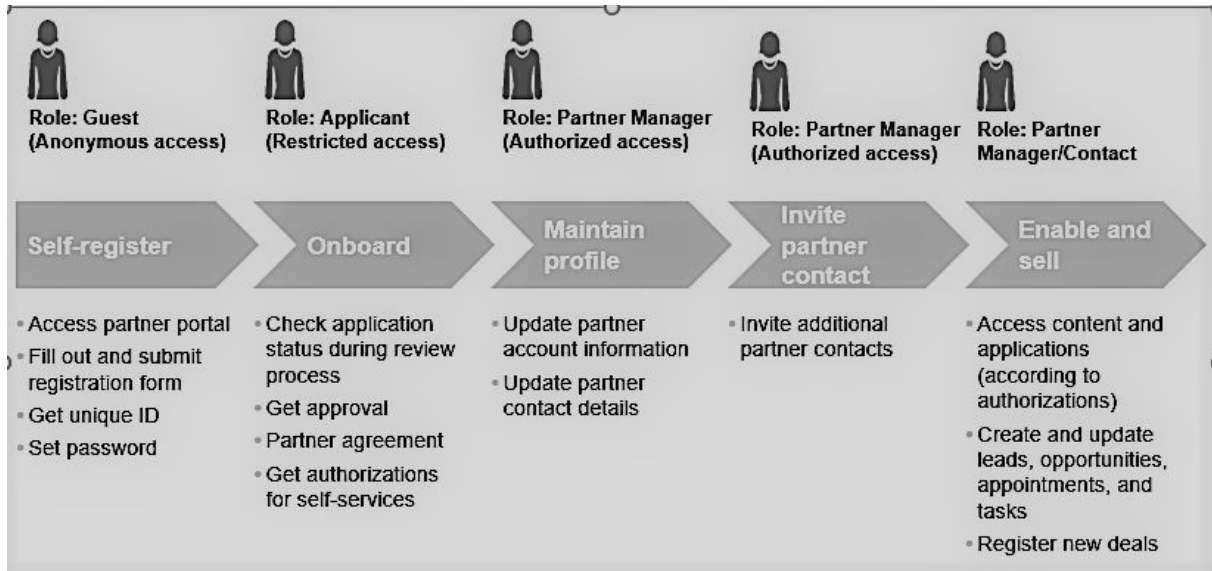Set Up Your Partner Portal [page 1182]
    Set up your partner portal so that your channel managers can engage more efficiently with your partner network.

29.3.1 Partner Portal Integration Landscape

Landscape details for the partner portal set-up.

29.3.2 Partner Registration and Onboarding

29.3.3 Set Up Your Partner Portal

Set up your partner portal so that your channel managers can engage more efficiently with your partner network.

You can quickly create a Partner Channel Management (PCM) solution from the SAP HANA Cloud Platform portal service GitHub repository and deploy it to your account. For more information, see: https://github.com/SAP/hcp-portal-service-for-pcm ↗ . .

Use the portal to give your partners all the information they need and make it easier to do business with your company. The goal is to help channel managers to efficiently engage with partners and enable their experts by:

- Providing a harmonized, central partner experience
- Providing easy, role-based access to high-value content, key information and intuitive self-services
- Empowering partners to efficiently and self-sufficiently support go-to-market campaigns and drive indirect revenue

Set Up Overview

The partner portal is based on SAP HANA Cloud Platform and leverages various platform services such as the portal launchpad, identity and user management, connectivity and roles, security as well as SAP Web IDE / SAPUI5 for custom development and extensions.

Customers can create their own partner sites or start with the provided apps delivered via the predefined integration with SAP Cloud for Customer which serves as the central system of record for the relevant business objects (partners, leads, opportunities, etc.) and the configuration of their meta data. The partner portal

solution provides pre-configured web applications that visualize the data from SAP Cloud for Customer exposed via oData services.

> **→ Recommendation**
>
> To ensure proper functionality, user accounts for your partner managers must be created on the portal site, **not** on the SAP Cloud for Customer system.

29.3.3.1 Prerequisites

SAP Service Cloud has set up and configured the integration between your SAP Cloud for Customer system and the SAP HANA Cloud Portal, a separately licensed solution.

For information on integrating your SAP Cloud for Customer system with SAP HANA Cloud Portal, contact your SAP Service Cloud representative.

29.3.3.2 Create Trust Between the Customer Account and SCI

To initiate the logon, first create setup the trust between the customer account and SCI.

Context

For the logon scenario, proceed as follows to create trust between the customer account and SCI.

Procedure

1. In the SAP HANA Cloud Platform Cockpit, open the customer account.
   1. Navigate to the *Trust* settings.
   2. Edit the *Local Service Provider* settings.
   3. Change the *Configuration Type* to `Custom`.
   4. Choose *Generate Key Pair* to display the signing key and certificate.
   5. Change the *Principle Propagation* to `Enabled`.
   6. Save your settings, then choose the *Get Metadata* link to download the metadata.
   7. Open the *Trusted Identity Provider* tab, then choose *Add Trusted Identity Provider*.
   8. Browse to locate the IDP metadata file, then upload it.

> **i** Note
>
> To find this file, navigate to
>
> ```
> https://[your SCI account name].[account domain].ondemand.com/saml2/
> metadata.
> ```

9. On the *General* tab, change the *User ID Source* to attribute and the *Source Value* to mail.
10. On the *Attributes* tab, choose *Add Assertion-Based Attribute*, then add the following attribute mapping.

Assertion Attribute	Principle Attribute
first_name	firstname
last_name	lastname
mail	email

11. Save your entries, then exit the customer account settings.

2. Open the administrator page of your SCI IDP account, located at

   ```
   https://[your SCI account name].[account domain].ondemand.com/admin.
   ```

   1. Choose *Applications*.
   2. Add a new application, specifying the customer's name as the application name.
   3. Open the SAML 2.0 Configuration and upload the customer's account SP metadata, which you downloaded in step 1f. of the current task.
   4. Save your entries, then exit the applications settings.

   Upon completing this procedure, you should be able to log on to the SAP HANA Cloud Portal space with the user ID (that is, e-mail) that was assigned to it when the customer's account was provisioned.

   > **i** Note
   >
   > If you cannot log on with this user ID, ensure that it has been added to the SCI account by visiting the SCI administrator page and uploading the user and user details in a `.csv` file format.

29.3.3.3 Create Trust Between the Customer Account and the SCI API

For the SAP ID invitation flow scenario, proceed as follows to create trust between the customer account and the SCI API.

Context

Procedure

1. Request a certificate to be used for authentication from the SAP Support Portal↗.
2. Open a KeyStore Explorer application, then proceed as follows.
    1. Choose *Create a new KeyStore*.
    2. Specify the *JKS* type.
    3. Choose ▌ *Tools* ❭ *Import Key Pair* ▌.
    4. Choose *PKCS #12*.
    5. In the *Decryption Password* field, specify the certificate password, then choose the certificate file.
    6. Choose an alias, or accept the default setting.
    7. When you are prompted to choose a new password, enter the original certificate password.
    8. Save the `.jks` file with the file name `sapid.jks`.
    9. When you are prompted to choose a new password, enter, again, the original certificate password.
3. In the SAP HANA Cloud Platform Cockpit, open the customer account.
    1. Choose *Destinations*.
    2. Upload the `sapid.jks` file.
4. Open your SCI IDP account.
    1. Choose *Certificate for API Authentication*.
    2. Upload the public part of the P12 certificate that you created, which is determined as follows:
        - Open Microsoft Internet Explorer®.
        - Choose ▌ *Internet Options* ❭ *Content* ❭ *Certificates* ❭ *Import* ▌.
        - Choose the P12 file.
        - Enter the password that you specified when you created the certificate.

        > **i Note**
        >
        > Accept the default checkbox selections.

        - Place the certificate in the Personal store, then choose *Finish*.
        - Find the certificate that you uploaded into the Personal store, then choose *Export*.
        - Choose *Next* until you view the file format options.
        - Select the *Base-64 encoded X.509* (.cer) format.
        - Enter a file name for the exported file, then choose *Finish*.
        - Using Notepad, open the exported file and copy the entire text, including the header and footer.

29.3.3.4 Create Trust Between the Customer Account and SAP Cloud for Customer

For the SAP Cloud for Customer invitation flow scenario, proceed as follows to create trust between the customer account and SAP Cloud for Customer.

Context

Procedure

1. Open the trust management settings of the SAP HANA Cloud Platform customer account.
   1. Copy the entry in the *Local Provider Name* field.
   2. Copy the entry in the *Signing Certificate* field, and save it in `.cer` format.
2. Within a separate browser window, log on to SAP Cloud for Customer with administrator authorizations.
   1. In the *Administrator* work center, under *Common Tasks*, choose *Configure OAuth 2.0 Identity Provider*.
      - Choose *New OAuth 2.0 Provider*.
      - In the *Issuing Entity Name* field, paste the entry that you copied in step 1a. of the current task.
      - From the *Primary Signing Certificate* field, choose *Browse* to locate the file in `.cer` format that you saved in step 1b. of the current task.
      - Select the *E-Mail Address* checkbox.
      - Choose `Submit`.
   2. Choose ▶ *Administrator* ❯ *OAuth 2.0 Client Registration* ❯.
      - Choose `New`.
      - Specify the client secret, client description, and token lifetime (in seconds).
      - In the *Issuer Name* field, use the dropdown list to specify the identity provider that you created in step 2a. of the current task.
      - Choose `Save and Close`.

29.3.3.5 Upload Destinations to the Customer Account

In this step, upload the destinations for each of the associated parameters.

Procedure

1. In the SAP HANA Cloud Platform Cockpit, open the customer account.

2. Upload the following destinations, along with the associated parameters.

   1. `SAPID`

      This destination is used for the SAP ID invitation flow scenario, and consists of the following parameters.

      > **i Note**
      >
      > Replace any text denoted in bold with the information that pertains to your solution.

      ```
      Name=sapid
      Type=HTTP
      URL=https://[your SCI account name].[account domain].ondemand.com
      ProxyType=Internet
      Authentication=ClientCertificateAuthentication
      KeyStore Location=sapid.jks
      KeyStore Password=[password specified when you created the certificate]
      TrustAll=true
      ```

   2. `C4C`

      This destination is used for connecting to SAP Cloud for Customer during its invitation flow scenario, and consists of the following parameters.

      > **i Note**
      >
      > Replace any text denoted in bold with the information that pertains to your solution.
      >
      > Replace NNNNNN with the numbers that are associated with the URL of your SAP Cloud for Customer tenant.

      ```
      Name=C4C
      Type=HTTP
      URL=https://myNNNNNN.crm.ondemand.com
      ProxyType=Internet
      Authentication=OAuth2SAMLBearerAssertion
      Audience=myNNNNNN.crm.ondemand.com
      Client Key=[OAuth client ID from SAP Cloud for Customer]
      Token Service URL=https://myNNNNNN.crm.ondemand.com/sap/bc/sec/oauth2/
      token?sap-client=[client number]
      Token Service User=[OAuth client ID from SAP Cloud for Customer]
      Token Service Password=[password specified in Client Key field during SAML
      client configuration]
      authnContextClassRef=urn:oasis:names:tc:SAML:2.0:ac:classes:PreviousSession
      nameIdFormat=urn:oasis:names:tc:SAML:1.1:nameid-format:emailAddress
      scope=UIWC:CC_HOME
      ```

   3. `C4C Public`

      This destination is used for connecting to SAP Cloud for Customer during an anonymous scenario on a public site, and consists of the following parameters.

      > **i Note**
      >
      > Replace any text denoted in bold with the information that pertains to your solution.
      >
      > Replace NNNNNN with the numbers that are associated with the URL of your SAP Cloud for Customer tenant.

      ```
      Type=HTTP
      authnContextClassRef=urn:oasis:names:tc:SAML:2.0:ac:classes:PreviousSession
      Authentication=BasicAuthentication
      ```

```
Name=C4C__public
ProxyType=Internet
URL=URL=https://myNNNNNN.crm.ondemand.com/sap/byd/odata/v1/pcmportal
nameIdFormat=urn:oasis:names:tc:SAML:1.1:nameid-format:emailAddress
User=[Administrator User ID]
Password=[Administrator Password]
scope=UIWC:CC_HOME
```

4. `c4c_pcmpublic`

> **i Note**
>
> Replace any text denoted in bold with the information that pertains to your solution.

```
Name=c4c_pcmpublic
Description=destination to public self-registration widget
URL=[URL of the customer account subscription to the pcmpublic Helium
application]
ProxyType=Internet
Type=HTTP
Authentication=NoAuthentication
```

30 Collections

Create online or offline payments for open, overdue invoices and review historical invoices and payments.

With the Collections functionality, you can:

- View invoice and payment details online or offline for one or more customers.
- Create payments for open invoices and assign payments to pending invoices.
- Create payments using payment methods such as cash or check and capture signature of the payer and/or recipient.
- Configure the following for your payment creation process:
  - Determine if signature capture is required and stored with the payment.
  - Define whether signature capture is mandatory.
  - Configure if partial payments are accepted.
- Integrate with SAP ERP using iflows.

The *Collections* workcenter has two tab screens namely the *Payments* and *Invoices*. Use A2X or A2A services to replicate open invoices and payments in your external system. The *Collections* tab screen is also displayed under *VISITS*. In the visits other KPIs are also displayed.

These include

- *Total Amount Owed* that is the total amount owed by the account from all open and paritally paid invoices.
- *Amount Paid* that represents the amount that was cleared during this visit.
- *Amount Remaining* that refers to the amount still remaining to be paid.

> **i Note**
>
> The KPI calculation and the invoice list are cleared after the visit is *Checked Out* by the sales representative.

30.1 Scope and Configure Collections

Administrators can configure Collections under *Business Configuration* scoping.

30.1.1 Enable Collections

Administrators can enable the *Collections* work center in your system.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* ◀. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Industry Solution* 〉 *Consumer Product Extended* ◀ and select *Payment* and *Invoice*. These two work center tab screens appear under the *Collections* work center.

Also go to ▶ *Business Configuration* > *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* > *Questions* > *Industry Solution* > *Consumer Product Extended* > *Payments* ▶, appropriately review and select the following questions:

- **Payment Signature Settings**
  Determine if payments should be allowed with a digital signature or simply with the signature of the employee responsible or if both are required for validating payments.
  - Do you want to capture and attach a graphical signature of the payer for the payment.
  - Do you want to capture and attach a graphical signature of the receiver of the payment.
  - Do you want to make graphical signature capture mandatory?

- **Block Partial Payment**
  - Do you want to block partial payments
    If you scope this question, you cannot make partial payments for invoices. Any payment that you make must match the total balance amount for the invoice.

30.1.2 Enable Replication of Payments and Invoices

Administrators can maintain the requisite configuration to replicate invoices from external systems.

Go to ▶ *Business Configuration* > *Implementation Projects* ▶. Select your project and navigate to ▶ *Edit Project Scope* > *Questions* > *Communication and Information Exchange* > *Integration with External Applications and Solutions* > *Integration into Sales, Service and Marketing Processes* > *Collections* ▶ and review and select the following questions.

1. Do you want to receive invoice information from an external application or solution to your cloud solution?
2. Do you want to transfer payments information from your cloud solution to an external application or solution?

30.1.3 Replicate Payments

Administrators can setup the communication scenario under ▶ *Administrator* > *General Settings* > *Integration* > *Communication Arrangements* ▶.

The following communication scenarios are supported for payments:

- A2X scenario - Consumer Product Extended - Invoice Replication
- A2A scenario - Invoice Replication from External System

> **i Note**
>
> The A2A scenario is displayed in the list of communication arrangements only if it has been scoped in the business configuration as described earlier in this topic.

30.1.4 Replicate Invoices

Administrators can setup the communication scenario under ▶ *Administrator* ❯ *General Settings* ❯ *Integration* ❯ *Communication Arrangements* ◀.

The following communication scenarios are supported for invoices:

- A2X scenario - Consumer Product Extended - Payment Replication
- A2A scenario - Payment Replication to External System

> **i Note**
>
> The A2A scenario is displayed in the list of communication arrangements only if it has been scoped in the business configuration as described earlier in this topic.

> **i Note**
>
> The invoices you replicate are read-only in the cloud solution. You can use standard A2X synchronous services to replicate from SAP ERP system. Alternatively, you can also use A2A asynchronous services to replicate the invoices from an external third party system.. You need to maintain the required business configuration under scoping to be able to use A2A services.

30.1.5 Maintain ID Mapping

Administrators can maintain the ID mapping sales organization IDs and business partners (such as account and payer) in the system and map them to corresponding internal ID's in the cloud solution.

30.1.6 Maintain Access Restrictions for Payments and Invoices Tabs

Administrators can configure the requisite access restrictions for payments and invoices tab screens in the *Collections* work center.

Maintain access restrictions for payments and invoices in the *Business Configurations*.

- Restrict *Payments* and *Invoices* for read and write access at the *Employee* or *Team leave*l.
- Restrict *Invoices* for read and write access at the *Sales Area* level.

30.2 Payments and Invoices

Overview of payments and invoices.

30.2.1 Pay Invoices

If the *Collections* scenario is scoped in your solution, then you will see the *Collections* work center. The *Collections* tab also appears in the visit with the *Payments* and *Invoices* sections. If you have replicated invoices for an account and sales area using A2X or A2A services, you will see that these appear in that customer's visits as open invoices. Note that all invoices are read-only in the cloud solution.

You can initate a payment from the visit or from ▌▶ *Collections* ❯ *Payments* ▐. Payment by cash and using cheque are supported. When you create a payment, a corresponding payment object gets created and is attached to the invoice. You can make mass payments by selecting more than one invoices or make partial payments (provided you have not blocked partial payments in the scoping). If you have enabled mandatory signature capture for the payer and the recipient, you need to capture the corresponding graphical signatures.

> **i Note**
>
> In the current release, you can only make payments from the *Collections* tab screen under *Visits*.

> **i Note**
>
> In mass payments, the invoices with earlier dates are paid first. Therefore, when you track the status of the invoices after making a collective payment, you will see that some of the most recent invoices may be in status *Partially Paid*.

Click on *Finish* and you will see that the invoice no longer appears in the list of pending invoices. A new payment is created. Navigate to the payment to see the *Invoice Payment Status* as *Paid*.

30.2.2 Transfer Payments

If the **A2A** agent for payments are scoped, then a new action for *Transfer* is available in the *Payment* tab screen. Select this action to transfer any finished or cancelled payments to external system. The action transfers to an external system, payment details along with its related invoices.

> **i Note**
>
> Payments that have been transferred or with status *In Process* cannot be modified.

30.2.3 Cancel Payments

Use the action *Cancel* to cancel a finished payment. The open invoice reappears in the list of invoices and the status of the payment is changed to *Canceled*

30.2.4 Enable Replication of Payments and Invoices

Administrators can maintain the requisite configuration to replicate invoices from external systems.

Go to ▶ *Business Configuration* 〉 *Implementation Projects* ◀. Select your project and navigate to ▶ *Edit Project Scope* 〉 *Questions* 〉 *Communication and Information Exchange* 〉 *Integration with External Applications and Solutions* 〉 *Integration into Sales, Service and Marketing Processes* 〉 *Collections* ◀ and review and select the following questions.

1. Do you want to receive invoice information from an external application or solution to your cloud solution?
2. Do you want to transfer payments information from your cloud solution to an external application or solution?

30.2.5 Replicate Payments

Administrators can setup the communication scenario under ▶ *Administrator* 〉 *General Settings* 〉 *Integration* 〉 *Communication Arrangements* ◀.

The following communication scenarios are supported for payments:

- A2X scenario - Consumer Product Extended - Invoice Replication
- A2A scenario - Invoice Replication from External System

> **i Note**
>
> The A2A scenario is displayed in the list of communication arrangements only if it has been scoped in the business configuration as described earlier in this topic.

30.2.6 Replicate Invoices

Administrators can setup the communication scenario under ▶ *Administrator* 〉 *General Settings* 〉 *Integration* 〉 *Communication Arrangements* ◀.

The following communication scenarios are supported for invoices:

- A2X scenario - Consumer Product Extended - Payment Replication
- A2A scenario - Payment Replication to External System

> **i** Note
>
> The A2A scenario is displayed in the list of communication arrangements only if it has been scoped in the business configuration as described earlier in this topic.

> **i** Note
>
> The invoices you replicate are read-only in the cloud solution. You can use standard A2X synchronous services to replicate from SAP ERP system. Alternatively, you can also use A2A asynchronous services to replicate the invoices from an external third party system.. You need to maintain the required business configuration under scoping to be able to use A2A services.

30.3 Collections Reporting

Use the analytics data sources for *Payments* and *Invoices* to gain insights into overall collections status.

31 Archiving

Archiving allows you to declutter your data and move irrelevant data into an archive storage. It helps reduce your data volumes and improve the performance of your solution.

This feature is available for the following business objects:

- Sales Quotes
- Sales Orders
- Activities
- Tickets

31.1 Scope and Configure Archiving

Administrators can configure archiving using scoping, scoping questions, and fine-tuning activities.

31.1.1 Enable Archiving

To enable the feature, follow these instructions:

1. Navigate to ▶ *Business Configuration* ❭ *Overview* ❭.
2. Under *Business Configuration Search*, search for **archiving**.
3. From the search results, click *Archiving Configuration*.
4. Select the business objects for which you want to enable archiving.
5. Set the retention periods or retain the default values.
6. *Save* your changes.

> **i Note**
>
> Once you enable archiving for a business object, you can't disable it.

31.1.2 Configure Archiving

Configure archiving differently for the activity objects: Activity Tasks, Appointments, and Visits.

For each object you've enabled, set different retention periods to suit your needs.

| Version: | SAP Default | Business Option: | Built-in Services and Support: Business Environment: Archiving Configuration |

⊞ (6)

Business Object	⊜	Archiving Enabled	Retention Period Before Archiving	Residence Period	Retention Period Before Deletion
Activity Task		✓	273	91	730
Appointment		✓	273	91	730
Sales Order		✓	1.825	182	3.650
Sales Quote		✓	730	182	3.650
Ticket		✓	730	182	3.650
Visit		✓	273	91	730

☑ 1 Selected

Retention Period Before Archiving: Minimum number of days after the last change is made to a record before it's considered for archiving.

Retention Period Before Deletion: Number of days a record is kept in the archive before it's deleted from the system.

31.1.3 Search Archive

Once you've configured archiving, you can search through the archived documents.

Follow these instructions:

1. Navigate to ▌▶ *Administrator* ❯ *Archiving* ▌.
2. Under *Search Archive*, click *Search*.
3. From the dropdown, select an object or select *Archived Objects* to search across all archived documents.
4. Enter a keyword and search.
   If you want to refine your search further, click *Advanced*.
5. Once you see the search results, you can toggle between *All Items* and *My Items*.

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