

# SAP Hybris Cloud for Customer in Sales and Service Cloud Release Preview Version 18.08 (Aug 2018)

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August 14, 2018

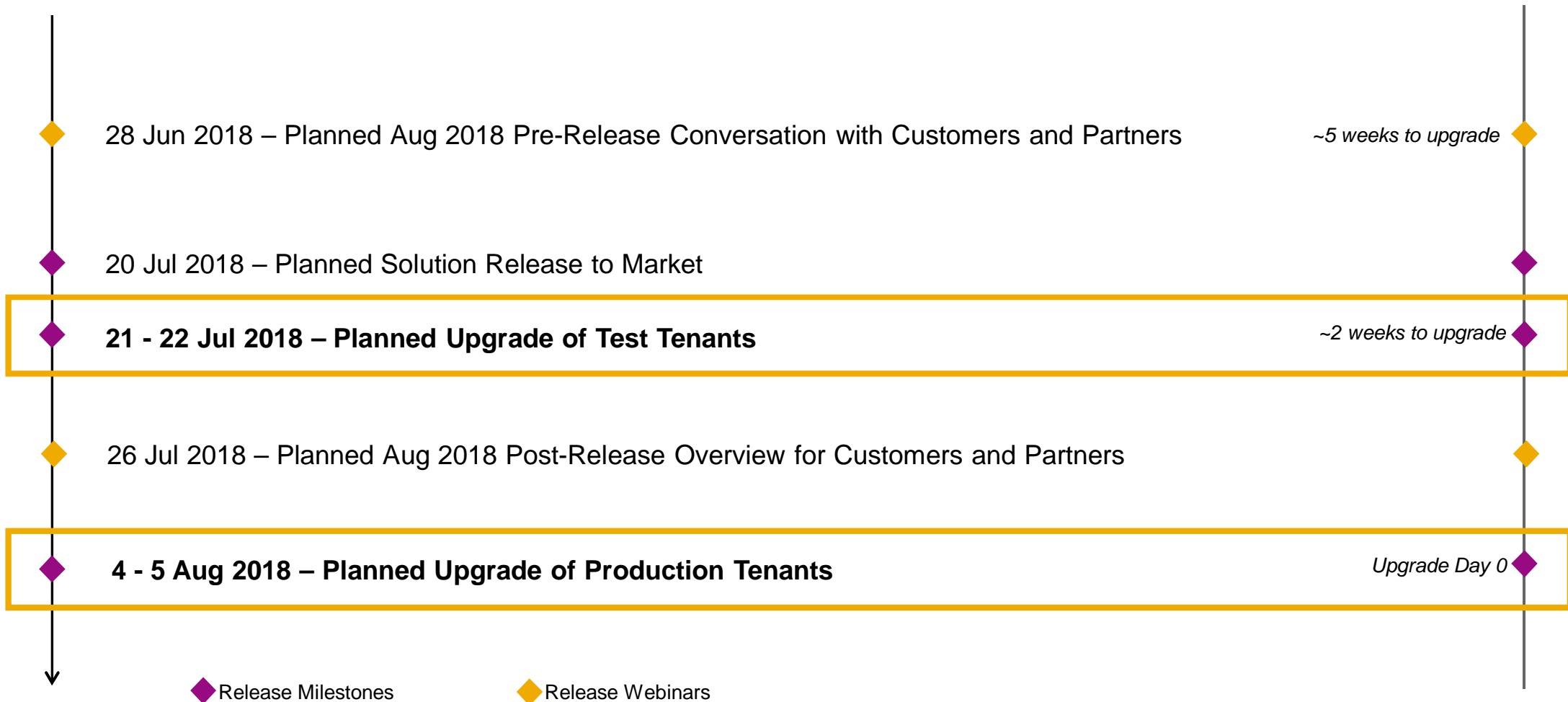
CUSTOMER



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# SAP Hybris Cloud for Customer – Aug 2018 (18.08) Release Planned Timeline



## New Release Information - 1808 Release Notes & Help Content

Note: The Pre and Post Release webinars offered for each release are designed to give you consolidated overviews on the key features for a release. These documents are not the sole source of truth about the release. Instead, the on-line help and What's New information is intended for that purpose. The on-line help documentation becomes available to customers on the RTC or Release to Customer date of each release.



On 20<sup>th</sup> July, 2018 – please find official 1808 documentation here:

<https://help.sap.com/viewer/637db7a0d01e47009d9420e9a927c571/latest/en-US>

This link will always take you to the most recent “Released To Customer” version

# Key Announcements in UX



# SAP Hybris Cloud for Customer

## End of Life Announcements – Data Migration Tool

We are planning to sunset the Migration Work Bench (MWB) by 1902 release.

Customers are recommended to move to Data Workbench (DWB) functionality for data migration activities.

- Y Data Workbench is based on a modern micro-service based architecture and that is fully scalable to meet the needs of customers with high volume data loads
- Y Unlike Migration Workbench, Data Workbench supports CSV format for imports saving time for customers not having to prepare the files in SAP pre-defined templates in excel
- Y User Interface is simplified with 2 primary models of data migration – Import & Export making the data migration activity more efficient

# OData API V2 – “c4codataapi” – General Announcement

The screenshot shows the SAP Documentation interface for the **BusinessAttributeSet** entity type. The left sidebar contains a navigation menu with categories like Account, Activity Extension, Appointment, Attribute, and Attribute Set. The main content area displays the **Entity Type Details** for **BusinessAttributeSet**, including a diagram showing relationships with **BusinessAttributeSetAttributeAssignment** and **BusinessAttributeSetDescription**. Below the diagram, the **BusinessAttributeSetCollection** is described. A pop-up window titled **Create New BusinessAttributeSet** is overlaid on the main content, showing the **Request** and **Response** for the **Create** operation.

**Entity Type Details**

**Create New BusinessAttributeSet**

URI: `https://<ServiceURL>/BusinessAttributeSetCollection`  
Operation Type: Create  
HTTP Method: POST

**Request**

Sample Request (Create New BusinessAttributeSet)

```
{
  "BusinessAttributeSetID": "SAMPLE_SET_ID_1",
  "ObjectTypeCode": "147",
  "PersonRelevanceIndicator": true,
  "OrganizationRelevanceIndicator": true
}
```

**Response**

Sample Response

```
{
  "d": {
    "results": {
      "metadata": {
```

## Noteworthy enhancements

- § OData API V2 covers 40+ business objects, allowing read and/or write access to 1000+ collections (i.e. data points)
- § Provides better performance over the traditional SOAP API
- § OData protocol is superior to SOAP on functionality and performance
- § Based on an innovative technology allowing navigations between different business-object records (a.k.a. Cross-BO navigations) \*

Note: \*: Cross-BO navigations are planned in a future update without a set timeline.

## Documentation Features

- § API reference data with property/attribute details
- § Enhanced Entity Data Model diagrams
- § Sample payloads for supported Create/Read/Update/Delete (CRUD) operations

# SAP Hybris Cloud for Customer

## End of Maintenance Announcements – SOAP, A2X, OData V1

In conjunction with our release of the SAP Hybris Cloud for Customer OData API V2 (c4codataapi), previously available synchronous Web Service (a.k.a. SOAP, A2X) and standard OData API V1 (a.k.a. c4codata) are being deprecated

Deprecated APIs will continue to work and be supported until **February 2020**.

For new project, we recommend the use of newly released OData API V2

We recommend our customers who have consumed synchronous Web Service (SOAP, A2X) or standard OData API (c4codata) to plan on switching to the newly release OData API V2 (c4codataapi) prior to **February 2020**.

# SAP Hybris Cloud for Customer

## End of Life Announcements – HTML5 UI

In conjunction with our goals to streamline our UI offerings, SAP has the following End-of-Life Announcements:

HTML5 UI will Reach End-of-Life in November 2019 (succeeded by Fiori Client/RUI) for all users.

### What does End of Life mean for HTML 5 ?

All users – Key users and Business users will only have access to Fiori client UI and can no longer access HTML5 UI with 1911 release upgrade.

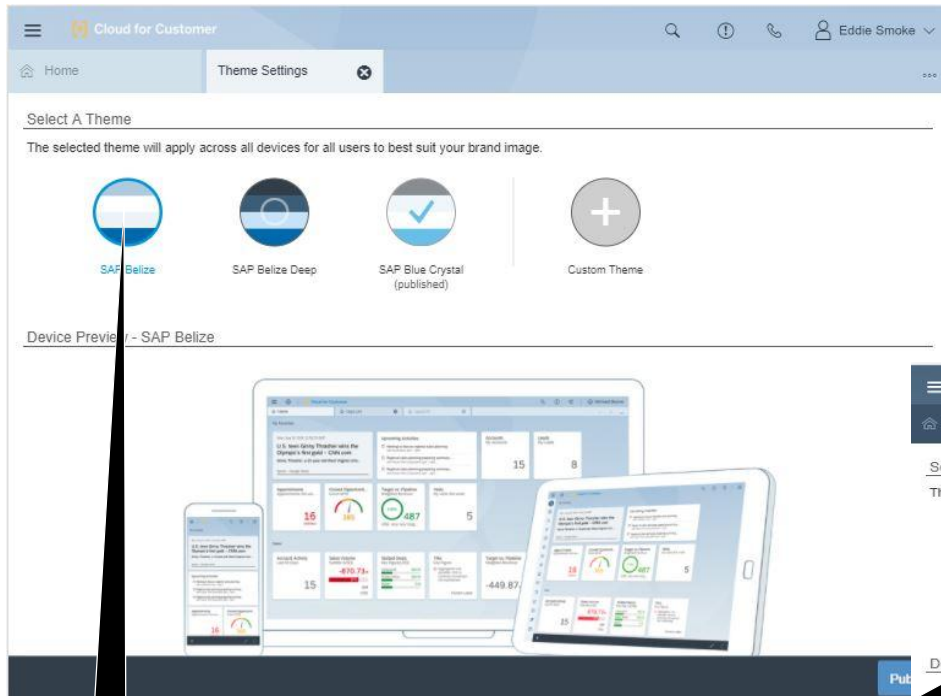
All business user functionality (Feature parity with HTML5 UI) is planned to be available in Fiori client by 1905 release.

All key user functionality is planned to be available in Fiori client by 1911 release.

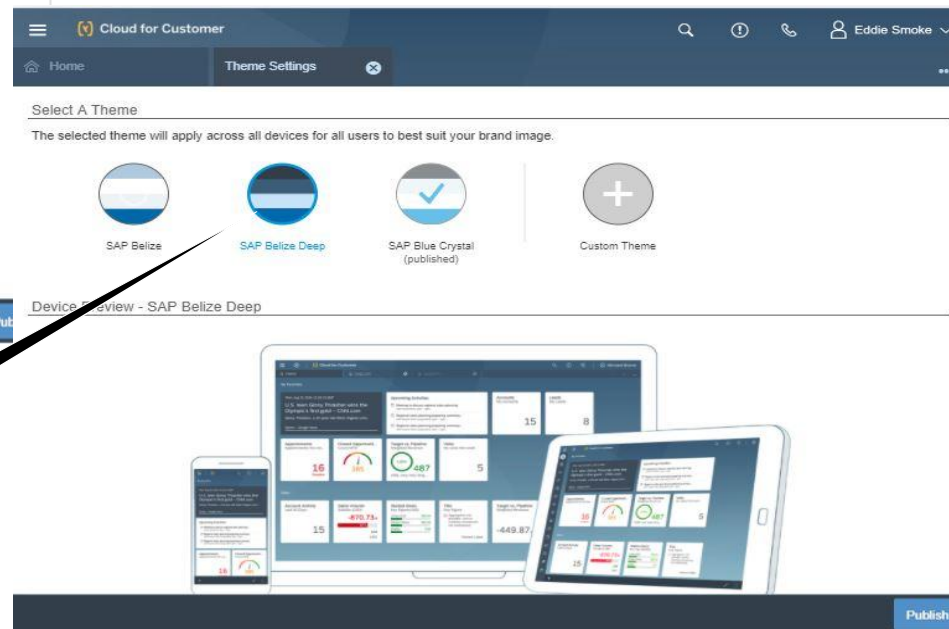
# General Information on New Belize UI Theme – Seen in Some Screen Shots

GA

- § SAP Hybris Cloud for Customer is introducing a new standard UI theme, which has been named 'Belize'.
- § In the 1808 release, this theme is now released as GA
- § Some of the screen shots seen in this presentation may be showcasing this new theme.
- § **Note: Features shown in Belize theme are available in the currently available 'Blue Crystal' theme.**
- § SAP Fiori Client only

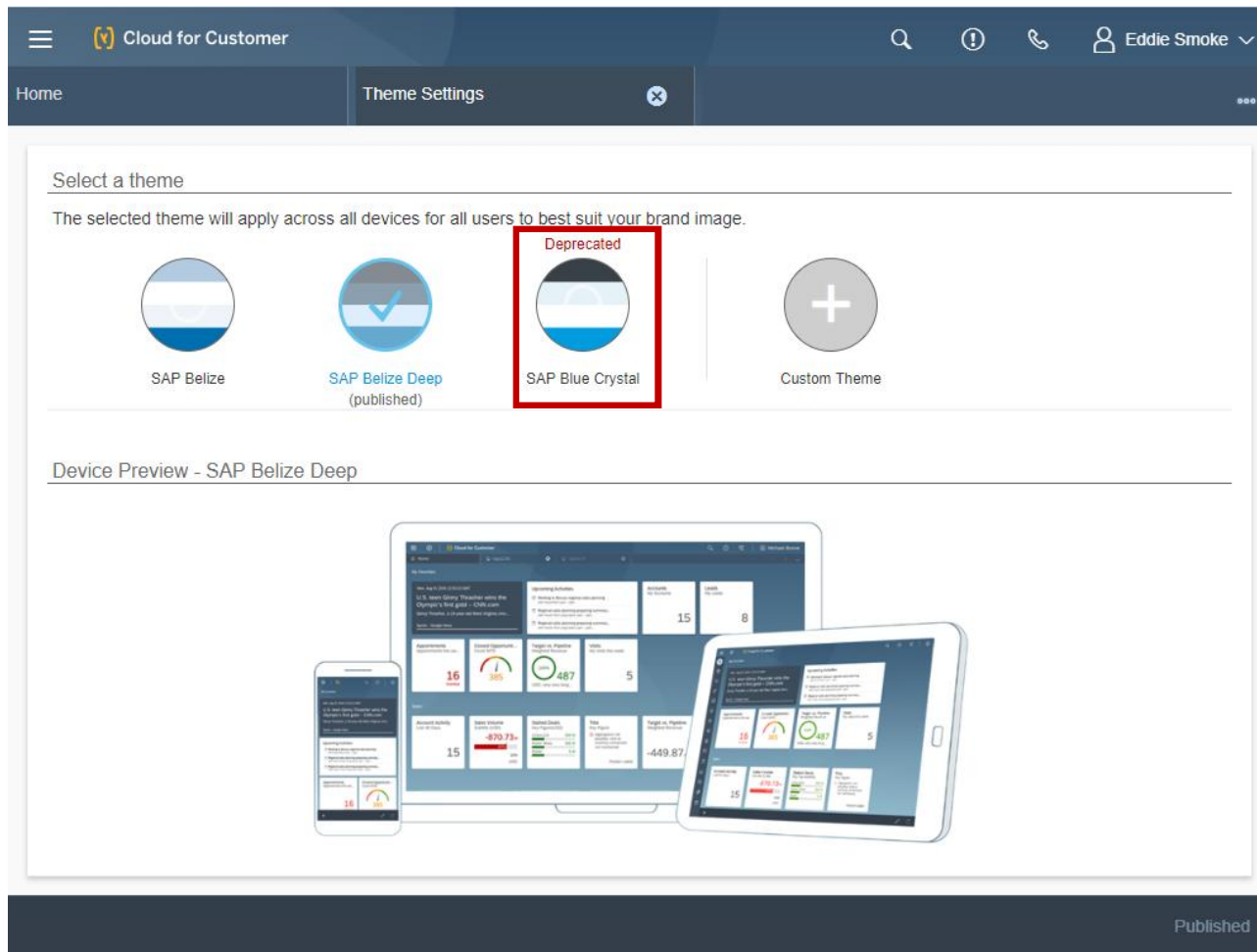


Belize



Belize Dark

# General Information on Blue Crystal Theme – Deprecated



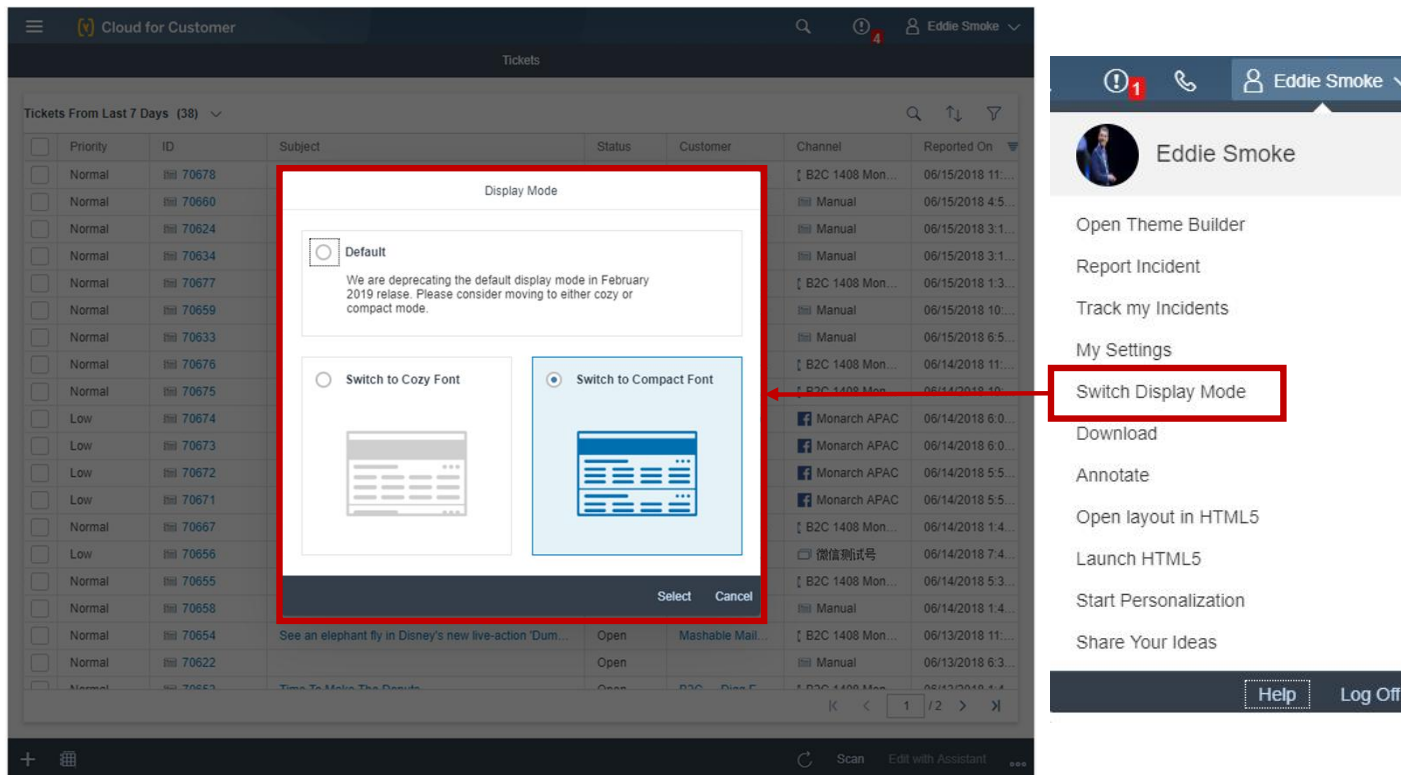
## Blue Crystal Theme is deprecated

- § Blue Crystal Theme is deprecated and will be supported only till 1902 release.
- § Belize Deep Theme will replace the current Blue Crystal theme in 1902 release as a default theme.
- § Blue Crystal theme is deprecated and will be removed from 1902 release.

## Set-up Details

- § Please use one of the Belize themes. This can be enabled by key users via Theme Builder.

# Fiori client: New Cozy and Compact modes



## Cozy/Compact modes

- § New Cozy/Compact modes are available for all form factors – Desktop, Tablets and Smartphones.
- § Users can switch between either of these modes based on their individual preferences (This selection is persisted on the specific device only).
- § **The current “Default” mode will be removed with 1902 release**

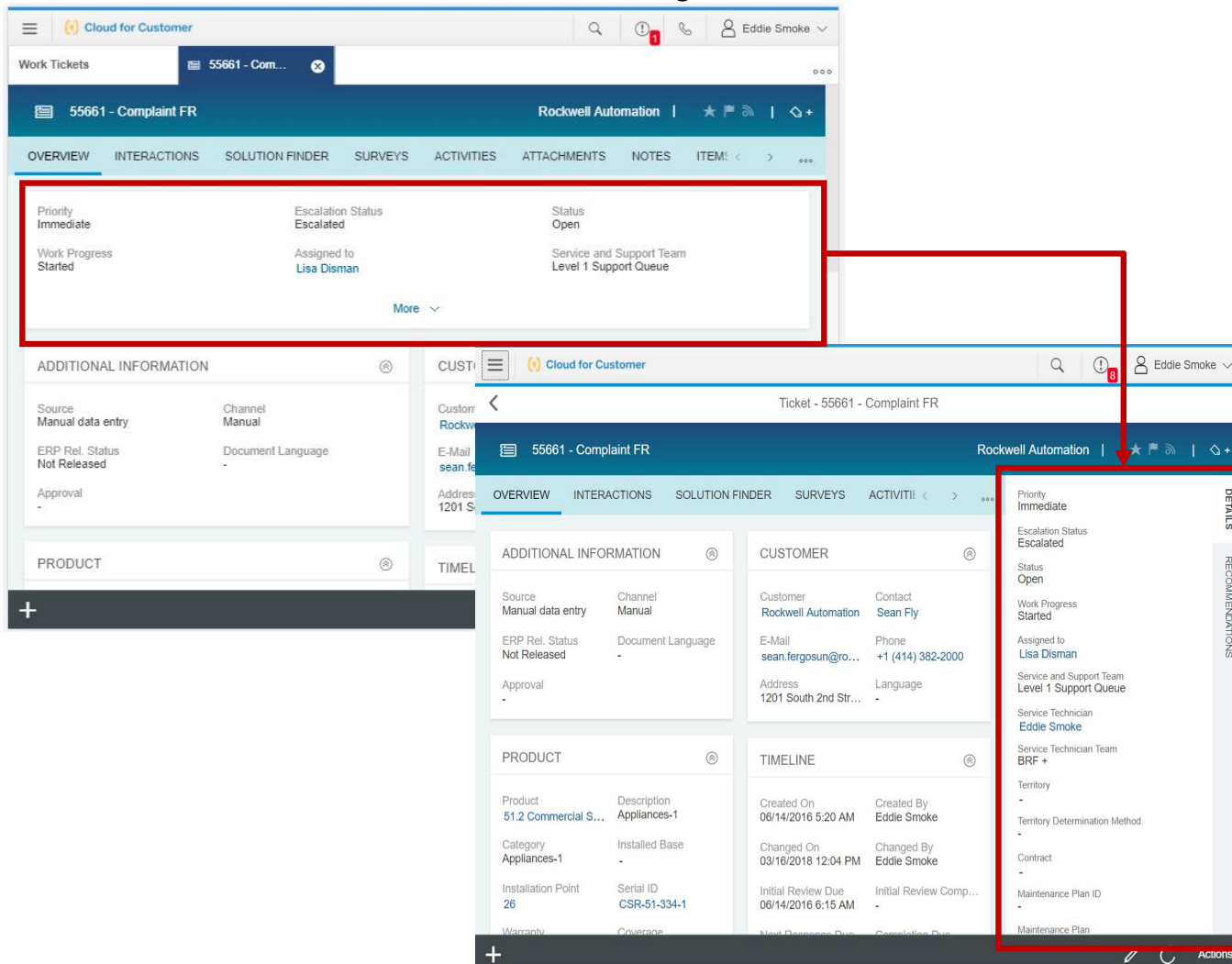
## Key Business Benefits

- § Compact mode provides denser content and thus users can see more information on the screen.
- § Cozy mode provides easy touch interaction on touch devices.
- § Both these new modes optimize white space thereby presenting more information on the screen.

## Set-up Details

- § Any user can make the switch via user menu.

# Fiori client: Side Panel – Object Header information to Details facet



## Object header details in Side Panel for Object detail

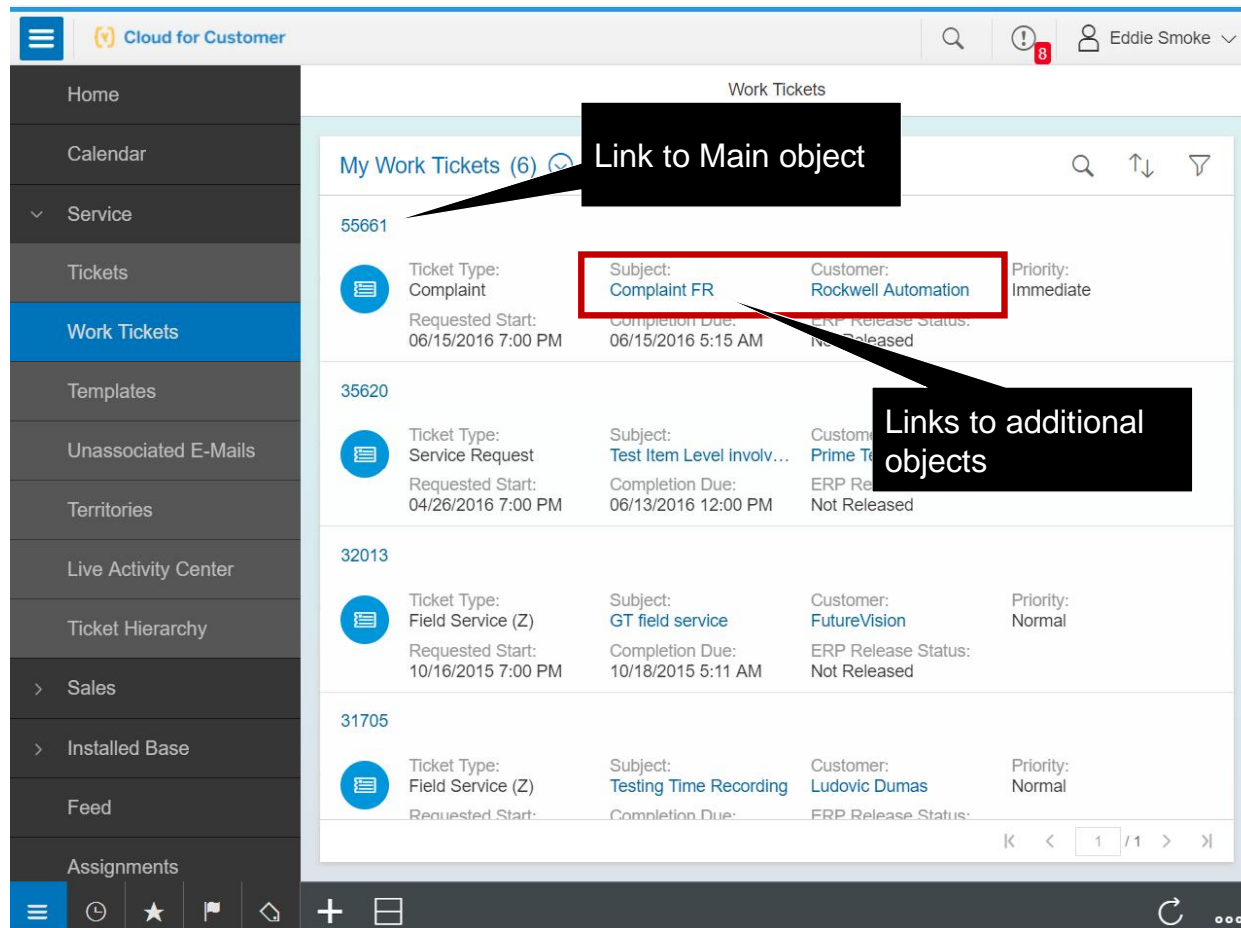
§ Object header information is now moved into the side panel in the “Details” facet.

## Key Business Benefits

§ Header information is now always accessible in the side panel while the user works on the main panel.

Side panel will become default from 1902 release and this company setting will be removed.

# Fiori client: Links on Chunk View



## Links on Chunk view now available

- § Links on chunk view are now enabled.
- § Clicking on the links will navigate to the relevant destination.
- § When links are enabled on chunk view, navigation to the main object can be done by clicking the main object link.

## Key Business Benefits

- § Users can now navigate to different objects within the chunk view directly.

Links on Chunk view will be default from 1902 release and this company setting will be removed.

# Fiori client: Multi Selection enhancement

Cloud for Customer

Tickets

Tickets From Last 7 Days (20)

| Priority | ID    | Subject                                       | Status | Customer                   |
|----------|-------|---|--------|----------------------------|
| Immed... | 69447 | Terry Crews hasn't heard from 'Expendables... | Open   | Mashable Mailbot GUANZO... |
| Normal   | 69435 |   |        |                            |
| Immed... | 69431 |   |        |                            |
| Immed... | 69428 |   |        |                            |
| Immed... | 69394 |   |        |                            |
| Normal   | 69434 |   |        |                            |
| Normal   | 69433 |   |        |                            |
| Normal   | 69436 |   |        |                            |
| Normal   | 69432 |   |        |                            |

Cloud for Customer

Unassociated E-Mails

All E-Mails (3588)

The following list contains all incoming e-mails that are not yet associated with a ticket.

| Name                                      | From      | E-Mail            |
|---|-----------|-------------------|
| 8 real women reveal how they lost 5...    | Fitocracy | jen@fitocracy.com |
| Skip the hassle of the gym with this ...  | Fitocracy | jen@fitocracy.com |
| Look younger and reduce aging for ...     | Fitocracy | JEN@FITOCRACY.COM |
| Trying to lose weight even faster for ... | Fitocracy | JEN@FITOCRACY.COM |
| I used to hate running on the tread...    | Fitocracy | JEN@FITOCRACY.COM |
| A woman's love of wine inspires the...    | Fitocracy | JEN@FITOCRACY.COM |
| Kick your sugar cravings for good w...    | Fitocracy | JEN@FITOCRACY.COM |
| Break out of Instagram's 'perfection ...  | Fitocracy | JEN@FITOCRACY.COM |

Checkboxes always enabled for multi-select list

No checkboxes for single select lists

## Multi Selection checkboxes now enabled by default

- § Multi-Select checkboxes will now be visible always when the company setting is enabled.
- § The selection toggle switch is then removed.
- § For multi-select lists, checkboxes will be shown always. For Single select lists no checkboxes will be shown.

## Key Business Benefits

- § Users can save a click for enabling the multi-selection checkboxes since the toggle action icon is now removed with this company setting.

This behavior will be default from 1902 release and this company setting will be removed.

# **SAP Hybris Cloud for Sales & Service**

## **What's new in 18.08?**

# Key Innovation Topics

## Sales Topics

- § Calendar
- § Activities
- § Visits
- § Routes
- § Surveys
- § Lead & Opportunity Management
- § Sales Quotes

## Service Topics

- § Communication Channels
- § Tickets & Time Recording
- § Industry/Utilities

## Cross Topics

- § Approvals & Involved Parties for Lead, Opportunity

# What's New in **Calendar**

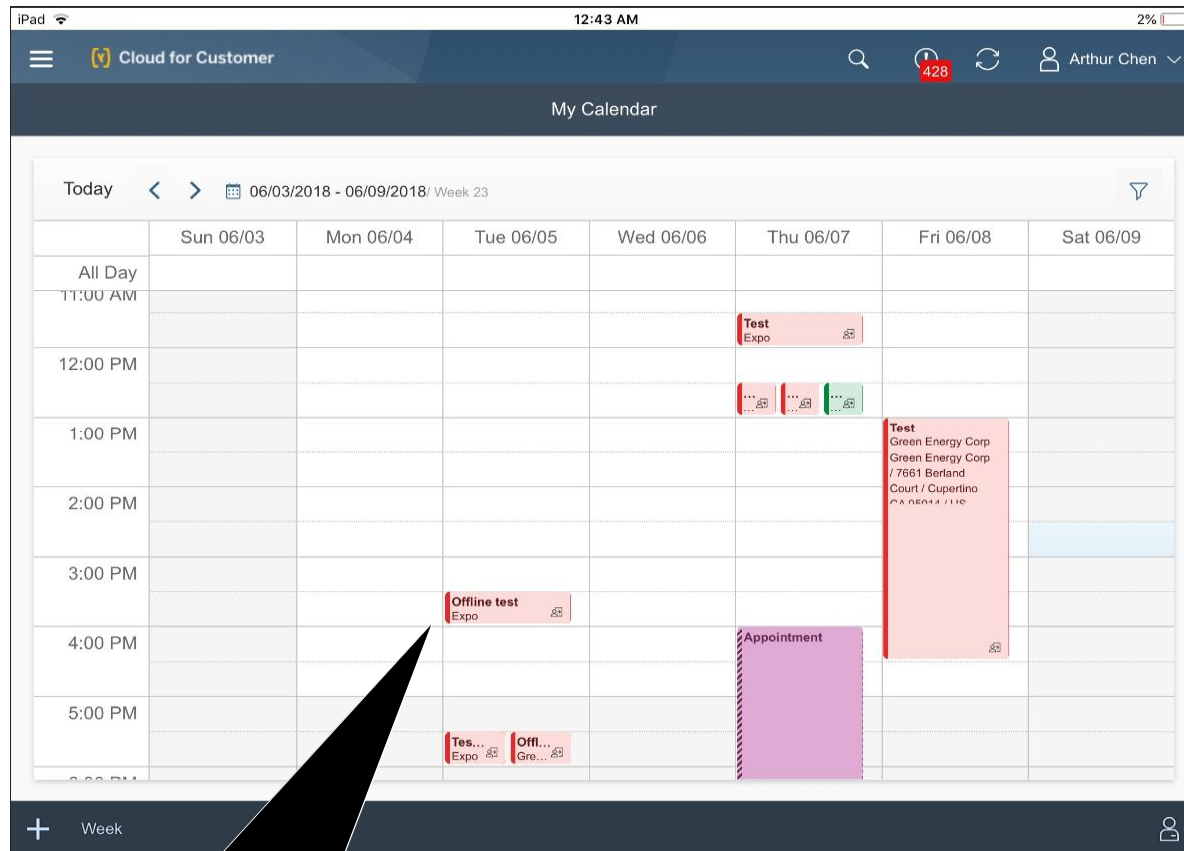


# What's New in 1808 for Calendar

## Key Innovations

§ Drag and Drop Optimizations for Mobile

# Calendar: Drag and Drop Optimizations



Press and hold to initiate drag and drop capability.

You can now **quickly drag and drop calendar items to different time slots on mobile devices** (phone/tablet) using a long press and hold on the activity of interest.

You can also directly navigate to the activity details in a single click when using a phone.

## Key Business Benefits

- § Optimized usability for mobile form factors

# What's New in **Activities**



# What's New in 1808 for Activities

## Key Innovations

- § Multiple Delegate Support
- § Customer-defined Access Control

## Additional Enhancements

- § Thumbnail/Image Views for Activities/Visits
- § Activity Summary and Data Source Enhancements
- § Out-of-Office Enhancements
- § Appointments – Search by Location
- § Activities/Visits - Search by Postal Code/State
- § Add Visit as a Related Item to An Activity

# Activities: Thumbnail Image Views for Party Tables

The screenshot displays the SAP Cloud for Customer interface. At the top, there's a navigation bar with 'Cloud for Customer' and a user profile 'Michael Johnes'. Below this, a 'Visits' section shows a 'Visit 061802' with a status icon. The main area is divided into tabs: OVERVIEW, TASKS, SURVEYS, CAMPAIGNS, CONTACTS, ATTENDEES, FOLLOW-UP ITEMS, SALES ORDERS, and DOCUMENT FLOW. The 'CONTACTS' tab is active, showing a table titled 'CONTACTS (2)'. This table contains two entries, each with a thumbnail image, a name, and an address. The first entry is 'Amrit Mann' with address '20 Maple St / South...'. The second entry is 'Aniket Sharma' with address '20 Maple St / South...'. To the right of the table, there's a 'DETAILS' sidebar for the selected contact, showing fields like ID (102777), Subject (061802), Status (Open), Account (NetApp US South), Address Selection (20 Maple St / South Portland 04116 / US), Visit Type (-), Organizer (Mike Summers), Owner (-), All Day Event, and No. At the bottom right, there are 'Actions' and 'Check In' buttons.

Thumbnail images of the individuals who are listed in party tables such as Contacts, can now be shown in the relevant places.

## Key Business Benefits

§ Clear visualization of involved parties related to an activity



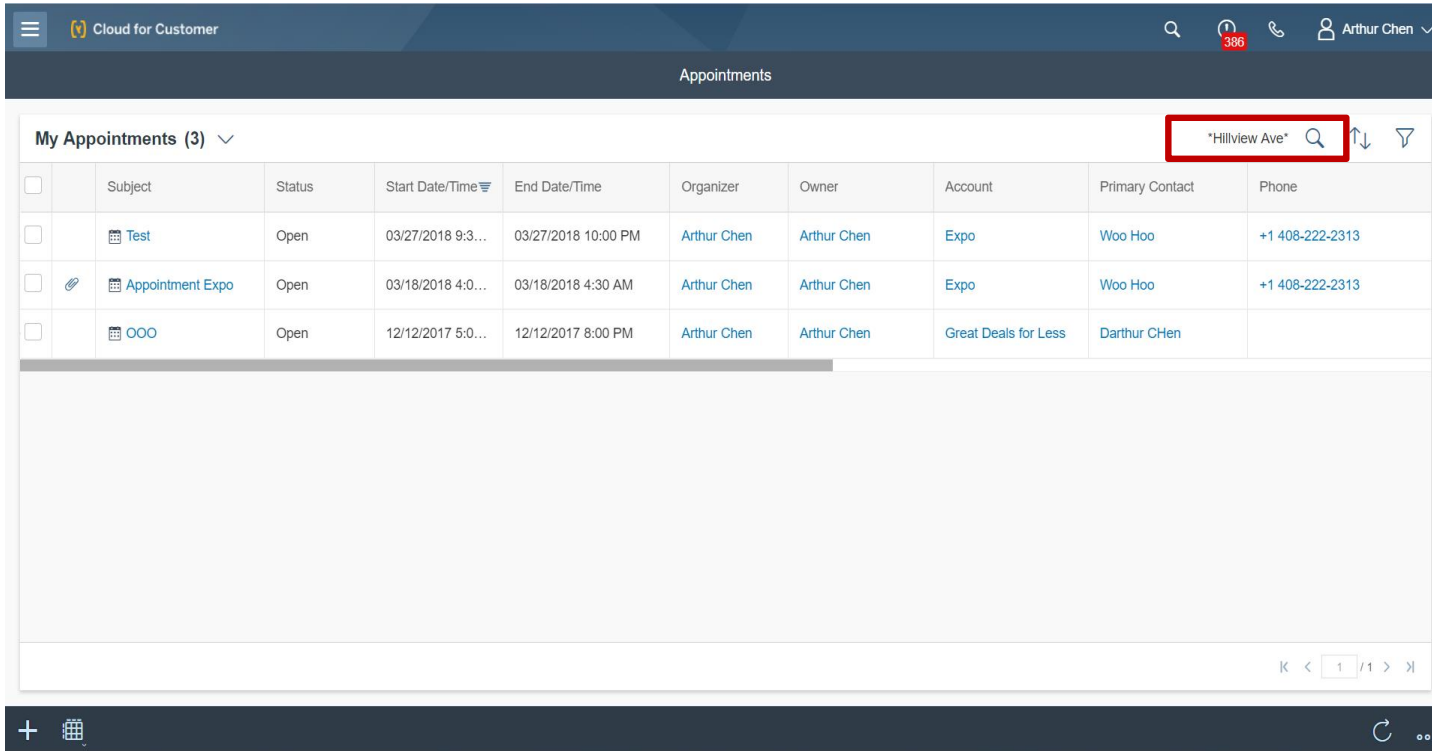
§ Personalize the new image column as visible in the relevant party table.

## Activities: Out of Office Enhancement - Alert

The screenshot displays the 'NEW APPOINTMENT' form in the SAP Cloud for Customer interface. At the top, a navigation bar includes the 'Cloud for Customer' logo, a search icon, a notification bell with '386', and the user profile 'Arthur Chen'. Below the navigation bar, a yellow alert banner with a red border contains the message: '⚠️ 2 Arthur Chen is out of office during this time. | A parallel activity exists.' The main form area is divided into two columns. The left column contains fields for 'Document Type' (Appointment), 'CustomReason', 'Account', 'Organizer' (Arthur Chen), 'All-Day Event' (NO), 'Start Date/Time' (06/17/2018, 5:00 PM), 'Category' (Customer Visit), 'Status' (Open), and 'Campaign'. The right column contains fields for 'CustomerVisitType', 'Subject' (Customer Visit), 'Primary Contact', 'Location', 'Show As', 'End Date/Time' (06/17/2018, 5:30 PM), and 'Priority' (Normal). At the bottom right, there are buttons for 'Save and Open' and 'Cancel'.

You will now be alerted in the case when a user, for which you are planning an activity, is out of office during the time specified for the activity (e.g. Appointment).

## Activities: Appointment – Search by Location Field



The screenshot shows the SAP Cloud for Customer interface for the 'Appointments' section. The top navigation bar includes the 'Cloud for Customer' logo, a search icon, a notification bell with '386', a phone icon, and the user profile 'Arthur Chen'. Below the navigation bar, the 'Appointments' title is centered. The main content area is titled 'My Appointments (3)' and features a search bar with the text '\*Hillview Ave\*' entered. The search bar is highlighted with a red box. Below the search bar, there is a table with columns: Subject, Status, Start Date/Time, End Date/Time, Organizer, Owner, Account, Primary Contact, and Phone. The table contains three rows of appointment data. At the bottom of the interface, there is a footer bar with a plus icon, a grid icon, a refresh icon, and a menu icon.

| Subject          | Status | Start Date/Time   | End Date/Time       | Organizer   | Owner       | Account              | Primary Contact | Phone           |
|------------------|--------|-------------------|---------------------|-------------|-------------|----------------------|-----------------|-----------------|
| Test             | Open   | 03/27/2018 9:3... | 03/27/2018 10:00 PM | Arthur Chen | Arthur Chen | Expo                 | Woo Hoo         | +1 408-222-2313 |
| Appointment Expo | Open   | 03/18/2018 4:0... | 03/18/2018 4:30 AM  | Arthur Chen | Arthur Chen | Expo                 | Woo Hoo         | +1 408-222-2313 |
| OOO              | Open   | 12/12/2017 5:0... | 12/12/2017 8:00 PM  | Arthur Chen | Arthur Chen | Great Deals for Less | Darthur CHen    |                 |

You can now quickly search for an appointment based on its location.

§ You can search for appointments by entering location information as free text through general or advanced search.

# Activities: Search by Postal Code/State

The screenshot shows the 'Appointments' search page in SAP Cloud for Customer. The 'My Appointments (72)' section contains various filter fields. A red rectangle highlights the 'State' dropdown menu, which is currently set to 'California', and the 'Postal Code' text input field, which contains the value '94304'. Other filters visible include Status, Start Date/Time (with a date picker), Category (set to '!(Visit;)'), Priority, Location, Owner, Account, Contact, Territory ID, Include Sub-Territories (checked), and Country (set to 'US - United States').

You can now search for activities by postal code or state.



- § The fields 'Postal Code', 'State', and 'Country' are hidden by default, and must be personalized as visible to be used.
- § Before selecting a state, you must select a country before the relevant states will appear in the 'State' drop down.
- § **Important Note:** If the Country field was previously maintained as visible through key user feature "Add Other Fields", please remove this instance of the field and make the new 'Country' field visible.

## Activities: Add Visit as a Related Item

The screenshot displays the SAP Cloud for Customer interface. At the top, the header shows 'Cloud for Customer' and a user profile for 'Arthur Chen'. The main navigation bar includes 'Appointments' and 'Appointment Expo'. The 'Appointment Expo' section is active, showing a table with columns for 'Name', 'Type', and 'Responsible'. A modal dialog titled 'Add Reference' is open, allowing the user to add a new reference. The dialog has two fields: '\*Type' with a dropdown menu showing 'Visit', and '\*Name' with a text input field containing 'Promotion Compliance Check'. Below the fields are buttons for 'Add', 'Cancel', and 'Save'. The background shows the 'Appointment Expo' details, including 'Start Date/Time' (06/09/20... 10:30 PM), 'Document Type' (Appointment), 'ID' (89246), 'Status' (Open), 'Subject' (Appointment Expo), 'Account' (Expo), 'Primary Contact' (Woo Hoo), and 'Organizer'.

You can now add a visit as a related item to an activity.

# What's New in **Visits**



# What's New in 1808 for Visits

## Key Innovations

- § Offline Worklist Determination of Tasks/Surveys
- § Geo-fencing – Visit check-in proximity validation
- § Visiting information by Visit Type

## Additional Enhancements

- § Draft Indicator for Surveys
- § Offline – Disable new visit creation prompt

# Visits: Geo-fencing – Visit Check-in Proximity Validation

The screenshot displays the SAP Cloud for Customer interface for a 'Store Visit' record. The top navigation bar includes 'My Calendar', 'Visit Store Visit', and user information for Arthur Chen. A warning message is shown in a yellow banner: 'Visit has not been checked in within 200 meters of the Account. | Not all automatically assigned Activity Plan Items are generated yet. | Your entries have been saved.' The main content area shows 'NOTES', 'NOTES FROM LAST VISIT', 'LAST VISITED' (Last Visit Date/Time: 04/30/2018 1:59 PM), and 'CONTACTS (1)'. The 'DETAILS' sidebar on the right shows fields for Status (Open), Account (Expo), Organizer (Arthur Chen), Owner (Arthur Chen), All Day Event (No), Start Date/Time (06/20/2018 8:00 AM), and End Date/Time (06/21/2018 9:00 AM). The 'Out of Range' field is highlighted with a red box, and the 'Yes' option is selected.

You can now see when visits are checked in outside of a configured proximity range to the account's geolocation.

- § As an Administrator, you can configure the desired visit check-in proximity to account geolocation based on the region of the account
- § Flag is triggered when user's geolocation falls outside of the desired check-in range

## Key Business Benefits

- § Improved transparency and alignment with business processes



## Set-up Details

- § Check-in proximity validation enabled through business configuration scoping
- § Distance configuration maintained through fine-tuning
- § Flag needs to be personalized

# Visits: Visiting Information by Visit Type

The screenshot displays the SAP Cloud for Customer interface. The top navigation bar includes 'Accounts', 'Visit Store Visit', and 'Prospect Expo'. The main menu on the left lists various functions: MARKETING ATTRIBUTES, CONTRACTS, PROMOTIONS, NOTES, BUYING CENTER, CHANGES, ECC SEARCH, VISITS DETAILS (selected), ACTIVITIES, and MAPPING FOR INTEGRATION. The 'VISITS DETAILS (3)' section is highlighted with a red box and contains the following table:

| Visit Type       | Sales Organization | Distribution Channel | Division   | Recommended Frequency | Visit Duration |
|------------------|--------------------|----------------------|------------|-----------------------|----------------|
| Business Review  |                    |                      |            | 7 Day(s)              | 45 Minute(s)   |
| Quarterly Review | Sales Unit DE      | Direct sales         | Division 2 | 3 Day(s)              | 2 Hour(s)      |
| Store Audit      | Sales Unit CA      | Direct sales         | Division 1 | 5 Day(s)              | 45 Minute(s)   |

Below this table, it indicates '1 selected' and provides a 'Clear Selection' link. The 'VISITS (1)' section below shows a single visit record:

| Subject    | Status | Primary Contact | Owner     | Phone           | Start Date/Time    | Action        |
|------------|--------|-----------------|-----------|-----------------|--------------------|---------------|
| Visit Expo | Open   | Woo Hoo         | Raj James | +1 408-777-7777 | 06/27/2017 2:30 PM | [Delete Icon] |

The bottom of the interface shows a '+', a pencil icon, and links for 'Web Services', 'Actions', and 'Summary'.

You can now maintain visiting information for accounts based on 'Visit Type'.

- § Visit Type-specific visiting frequency and duration can be maintained at account header and sales area level

## Key Business Benefits

- § Maintain specific visiting information configurations for detailed visit and route planning

# What's New in **Surveys**



# What's New in 1808 for Survey

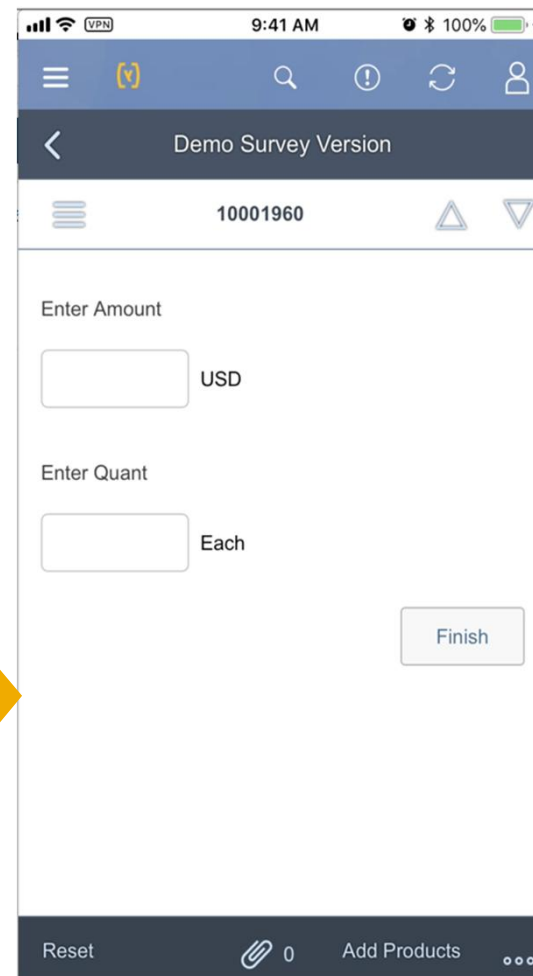
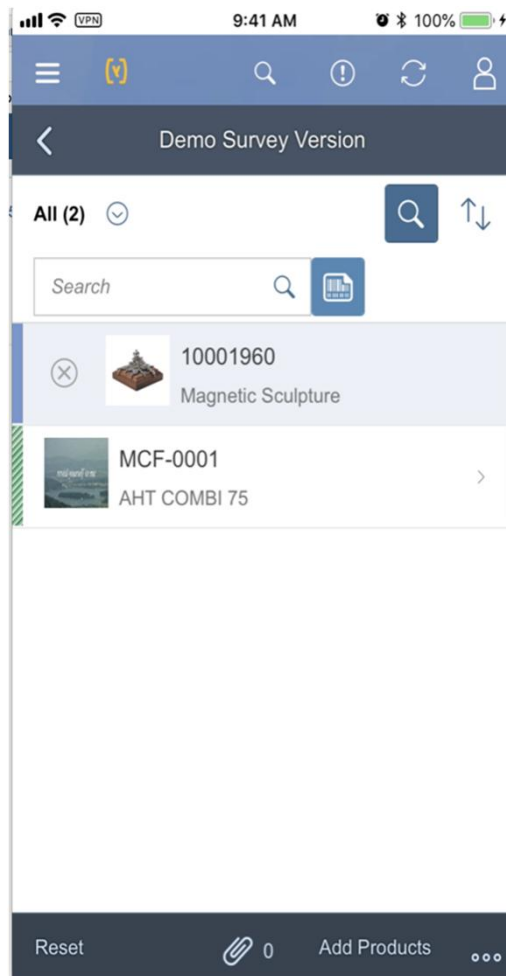
## Key Innovations

- § Product Inclusion and Search using Barcode Scanner

## Additional Enhancements

- § New Question Type – Numeric Value
- § Search of Products/Registered Products in Surveys using Extension fields
- § Inclusion of Registered Product Extension fields in Survey questions
- § Indicator for Surveys Saved as Draft

# Survey: Product Inclusion and Search using Barcode scanner.



Products can now be conveniently included in a survey using a bar code scanner

§ Products inside the survey can also be searched using a bar code scanner

## Key Business Benefits

§ Improved productivity by simplifying the process of including product information in the survey.



## Set-up Details

§ Bar code of the **GTIN** should be maintained for the products

§ This feature is only available for the mobile apps in the **online** scenario.

# Survey: New question Type – Numeric value

Design time addition of numeric value question

Surveys

Additional Product Check...

Additional Product Check...

Are SKU's placed in appropriate zone?

Yes No

Are all the advisors trained?

Yes No

Are the promotional materials displayed correctly?

Yes No

\*Number of Cups consumed per day

0 out of 5 Answered

You can now add 'Numeric Value' questions to a survey, as part of survey design.

## Key Business Benefits

- § The user can use the new numeric value question type to capture numeric (integer) responses.
- § The new numeric value question type can be included without specifying the UOM or the currency as a mandatory field.



## Set-up Details

- § Enabled by default

# What's New in **Lead and Opportunity**



# What's New in 1808 for Lead and Opportunity Management

## Key Innovations

### Leads

- § Related Leads
- § Deal Finder leveraging Machine Learning based scoring
- § Lead creation from Registered Product list

## Additional Enhancements

- § Decoupling Lead Qualification status from Lead Qualification level
- § Business action for defaulting “Individual Customer” option during Lead creation

# What's New in 1805 for **Sales Quotes**



# What's New in 1808 for Sales Quotes

## Key Innovations

- § Quote Versioning
- § Product Recommendations based on Machine Learning



## Additional Enhancements

- § UI Optimization - Vertical split of Products view
- § Delete Related Activities
- § Enhanced Party Determination for Standard Parties
- § Enhanced Data Workbench Support including Pricing
- § Delete Items via Multi Select
- § Enhanced Output Message that includes symbol for UoM

# Sales Quote: Versioning (1)

The screenshot displays the SAP Sales Quote Versioning interface. At the top, there are tabs for '9902 - UH Off...' and '9876 - gw initi...'. Below the tabs, a navigation bar includes 'OVERVIEW', 'PRODUCTS', 'ATTACHMENTS', 'VERSIONS' (highlighted with a red box), 'DOCUMENT FLOW', 'SALES DOCUMENTS', and 'PRICING'. The 'VERSIONS' section shows a table with 3 versions. A red box highlights the first three columns: ID, Group ID, and Version. A context menu is open over the table, showing 'Refresh', 'New Version' (highlighted with a red box), and 'Activate Version' (highlighted with a red box). A black callout box explains the 'New Version' and 'Activate Version' actions.

| ID   | Group ID | Version | Status           | Description      | Date       | Total      | Approval St |
|------|----------|---------|------------------|------------------|------------|------------|-------------|
| 9874 | 9874     | 1       | Inactive Version | gw               | 28.05.2018 | 93.45 USD  | Not Started |
| 9875 | 9874     | 2       | Inactive Version | gw               | 28.05.2018 | 100.00 USD | Not Started |
| 9876 | 9874     | 3       | Open             | gw initial 1s... | 28.05.2018 | 89.00 USD  | Not Started |

1 selected | Clear Selection

1 / 1 > >

Details: Group ID 9874, Version 3, Progress Not Relevant, Account Silverstar Logistics, Primary Contact Frederic Winston, Status Open, Approval Status Not Started, External Reference GW INITIAL, Description gw initial 1st version.

Actions: Edit, Refresh, New Version, Activate Version

**Action *New Version*** copies the selected quote to a new quote with same Group ID and Version increment.

**Only one active sales quote version with the same Group ID can exist and can be edited. Action *Activate Version*** allows you to activate the selected quote version.

- § In case your business requires quote iterations and negotiations with the customers, the new quote versions feature can help you to better track your sales quote changes.
- § You can now send sales quote proposals with the same sales quote ID (Group ID) plus a version number to the customer during the negotiation phase.
- § You can create and track sales quote versions in a new sales quote facet called **VERSIONS**.
- § The life cycle status value “**Inactive Version**” can be used to filter out quotes for reporting purposes.
- § You can search and track quote versions based on a new **Group ID** (advanced and basic search).

# Sales Quote: Versioning (2)

## Edit Project Scope: First Implementation

1 Country 2 Implementation Focus 3 Scoping 4 Questions 5 Review 6 Confirmation

Previous Next Finish Cancel Save Draft

- > Account and Activity Management
- > Product and Service Portfolio for Sales
- ✓ New Business
  - > Sales Lead Management (obsolete)
  - > Opportunities
  - > Sales Quotes
  - > Communication for New Business
  - > Analysis for New Business
  - > Sales Orders
  - > Sales Contracts
- > Lead Management
- > Deal Management
- > Sales Planning (SAP Cloud for Customer)
- > Partner Channel Management
- > Industry Solution
- > Communication and Information Exchange
- > Business Performance Management
- > Administration

Graphical Signature for Sales Quotes (1)

Do you want to capture and attach a graphical signature to the sales quote (Valid for touch enabled devices o... Revie... ☒

Re-Submit of Sales Quotes (1)

Do you want to control the reset of the approval status and output status via workflow rules? Revie... ☒

Sales Area Determination for Sales Quotes (1)

Do you want to enable users to default and specify, per sales quote, a predetermined combination of sales or... Revie... ☐

Sales Quote Versions (1)

Do you want to use Sales Quote Versioning? Revie... ☒

Submit Sales Quotes without Items (1)

Do you want to submit sales quotes without items? Revie... ☒

Details: Sales Quote Versions

Overview Relevance Dependency Your Notes

**Overview**

The Sales Quote Versions business option allows you to send sales quotes with the same sales quote ID plus a version number to the customer (adaptation of output form necessary). You can create and track all sales quote versions in a new facet called VERSIONS. A new introduced sales quote life cycle status "Inactive" can be used to filter out quotes for reporting purposes. You can only create an external follow-up document in ERP for an active, submitted sales quote. If a quote is replicated to or from an external system, no version handling is possible anymore.

- § You can now send sales quotes with the same sales quote ID plus a version number to the customer.
- § You can only create an external follow-up document in ERP for an active, submitted sales quote.
- § If a quote is replicated to or from an external system, no version handling is possible anymore.



- § Business Configuration -> Scoping Element: Sales -> New Business -> Sales Quotes: Tick question "Do you want to use Sales Quote Versioning?"
- § Form templates (besides Sale Quote Demo) need to be adjusted to print Group ID and version number.
- § Note: Quote versions cannot be created in offline mode.

## Sales Quote: UI Enhancement – Master/Detail View for Products (2)

The screenshot displays the SAP Sales Quote interface for quote 9968 - gw. The 'PRODUCTS' tab is selected in the top navigation bar. Below the navigation bar, the 'PRODUCTS (2)' table is shown. A red box highlights a new icon (a document with a magnifying glass) in the first column of the table, next to line item 10. A black callout box points to this icon with the text: 'Switch to Master Detail view to edit and view **Details** of selected item.'

| Line | Product ID | Description | Price  | Price Unit | Quantity | Discount (%) | Item Value | Item |
|------|------------|-------------|--------|------------|----------|--------------|------------|------|
| 10   | P120101    | Product A   | 399.00 | EUR        | 1        | -22          | 435.71     | USD  |
| 20   | P130100    | Product B   | 499.00 | EUR        | 2        | -22          | 1,089.82   | USD  |

Below the main table, there is a 'RECOMMENDED PRODUCTS (1)' section showing 'Product F' with ID '2211'. The bottom of the screen features a dark blue bar with a '+' icon on the left and 'Save', 'Cancel', and 'Actions' buttons on the right.

In this screen shot, you can see the traditional Product table view with a new icon added.

§ You can click on this icon to switch to the new master/detail view.

§ Note: If as an Administrator you do not want to use the new view shown on the previous page, then you will have to disable it in company settings as described on the next page.

# Sales Quote & Order: Master Detail Vertical Split layout (Desktop & Tablet only)

**Master List**

**Master Detail Vertical Split layout**

**Master Detail Vertical Split icon – Click these to open the split view**

| Line | Product Category     | Product ID | Description             | Price |
|------|----------------------|------------|-------------------------|-------|
| 10   | CUSTOMER-01 - TES... | 10000490   | Memory card             |       |
| 20   | CUSTOMER-01 - TES... | 10000100   | Canon Powershot         |       |
| 30   | CUSTOMER-01 - TES... | 10000405   | Voltrae Air Conditioner |       |
| 40   | CUSTOMER-01 - TES... | TEST_1002  |                         |       |
| 60   | CUSTOMER-06 - Bikes  | ROARTEST23 |                         |       |
| 70   | CUSTOMER-06 - Bikes  | 10000894   |                         |       |
| 80   | CUSTOMER-06 - Bikes  | PCMPROD3   |                         |       |
| 90   | CUSTOMER-01 - TES... | P300102    |                         |       |

**PRODUCTS (14)**

**Master Detail Vertical Split layout**

**PRODUCTS (14)**

**10000490**

**Line 10**

**Product Category**  
CUSTOMER-01 - TEST SP

**Description**  
Memory card

**Price**  
--

**Item Type**  
Product - Order Item

**Quantity**  
1 ea

**More**

**PRODUCT PRIC...(0)**

**Add**

**Price Componen** **Description** **Status** **Manua**

**No data**

**Actions** **Finish**

**Master Detail Vertical Split layout is now enabled for Products table in Sales Order**

- § The Products table in Sales Order now displays detailed information in a Master-Detail Vertical split pattern.
- § This layout is now **by default turned ON**.

## Key Business Benefits

- § Details about each line item can now be viewed and edited on a larger screen area.

**Master Detail Vertical Split layout will be the only option from 1902 release and this company setting will be removed.**

# Sales Quote: UI Enhancement – Master/Detail View for Products (3)

## Company Settings

Save and Close Save Close Discard Changes

You can define the company settings for all users or a selected business role. For the changes to reflect, you must log off and then log on.

Define settings for : Company

General Theme Auto Logoff Client Signature UI Controls

Select the checkbox against a feature to enable or disable it.

- |   |  |
|---|--|
| <input type="checkbox"/> Disable User Personalization Features                    | <input type="checkbox"/> Disable Go to SAP Store Button  |
| <input checked="" type="checkbox"/> Enable Horizontal Scrollbar                   | <input type="checkbox"/> Disable Download Button   |
| <input type="checkbox"/> Disable Flags  | <input type="checkbox"/> Disable Favorites   |
| <input type="checkbox"/> Disable Follow   | <input type="checkbox"/> Disable Report Incident   |
| <input checked="" type="checkbox"/> Disable Quick View                            | <input type="checkbox"/> Enable Flat List Navigation Menu in Fiori Client                                    |
| <input checked="" type="checkbox"/> Enable Chunk View as Default in Tablets       | <input checked="" type="checkbox"/> Enable Easy Create from Object Detail View                               |
| <input type="checkbox"/> Disable Annotation in Fiori Client                       | <input type="checkbox"/> Disable Enterprise Search in Fiori Client   |
| <input type="checkbox"/> Disable Implicit Personalization                         | <input type="checkbox"/> Disable Auto Search on Lists  |
| <input type="checkbox"/> Disable Multi Tabs in Tablets                            | <input checked="" type="checkbox"/> Enable Nearby Search and Search by Area on the Map                       |
| <input checked="" type="checkbox"/> Enable Links in Chunk View in Fiori client    | <input type="checkbox"/> Hide Share Your Ideas Menu Option   |
| <input checked="" type="checkbox"/> Hide Navigation Menu on Login in Fiori Client | <input checked="" type="checkbox"/> Enable Side Pane in Fiori client   |
| <input type="checkbox"/> Disable Map in Calendar Day View in Fiori client         | <input type="checkbox"/> Disable Vertical Split View for Master Detail Layout in Sales Order and Sales Quote |

§ As an Administrator, you can use the company setting to **disable the new vertical split** in sales quotes for representing master details view in the **Products facet**.

§ Note that the vertical split also applies for **Involved Parties facet** in quote and order.

**IMPORTANT NOTE:** The new view will be active immediately after upgrade to 1808 if the Company Setting is been not changed accordingly.

# Sales Quote: Enhanced Data Workbench Support including Pricing

## Data Workbench now supports

- § Import, export, and update of external pricing conditions (update and create price conditions that can be manually changed)
- § Import, export, and update of internal price conditions (update and create price elements that can be manually changed)
- § Migration of lost sales quotes in one step (set *Reason for Rejection* and new flag *Set to Lost if Cancelled*)

# Sales Quote: Enhanced Output Message that includes symbol for UoM

## Quantities and Units of Measure

Version: **Customer Specific** Business Option: **Built-in Services and Support: Business Environment: Units, Rates, and Cross-Application Data: Quantities and Units of Measure**

[Save and Close](#) [Save](#) [Close](#) [Translate](#)

### Trading Units of Measurement

You can define and maintain trading units of measurement.

Note: When creating your entries in the table below, the unit must begin with the letter Z.

[Add Row](#) [Remove](#)

| Unit | UoM Symbol | Description | Activation Status | Display Decimals |
|------|------------|-------------|-------------------|------------------|
| EA   | ea         | Each        | 2 - Released      | 0                |
| XBG  | bag        | Bag         | 2 - Released      | 0                |
| XBX  | box        | Box         | 2 - Released      | 0                |
| XCR  | crate      | Crate       | 2 - Released      | 0                |
| XCS  | case       | Case        | 2 - Released      | 0                |
| XCT  | car        | Carton      | 2 - Released      | 0                |
| XPB  | pack       | Package     | 2 - Released      | 0                |
| XPX  | pallet     | Pallet      | 2 - Released      | 0                |
| XSX  | set        | Set         | 2 - Released      | 0                |

3 - Blocked (148)

§ Quote output print form uses the description of Unit of Measurements (UoM) in the print templates.

§ UoM Symbol is now part of the sales quote output message.



Adaptation of the quote output form necessary.

# What's New in Communication Channels



# What's New in 1808 for Communication Channels

## Key Innovations

### Interactions & Response Feeder

- § Inline E-Mail editor
- § Interactions – List View (Phased Delivery)
- § Support Forwarding of Emails with Inline Images

## Additional Enhancements

### Live Activity

- § Reset default search

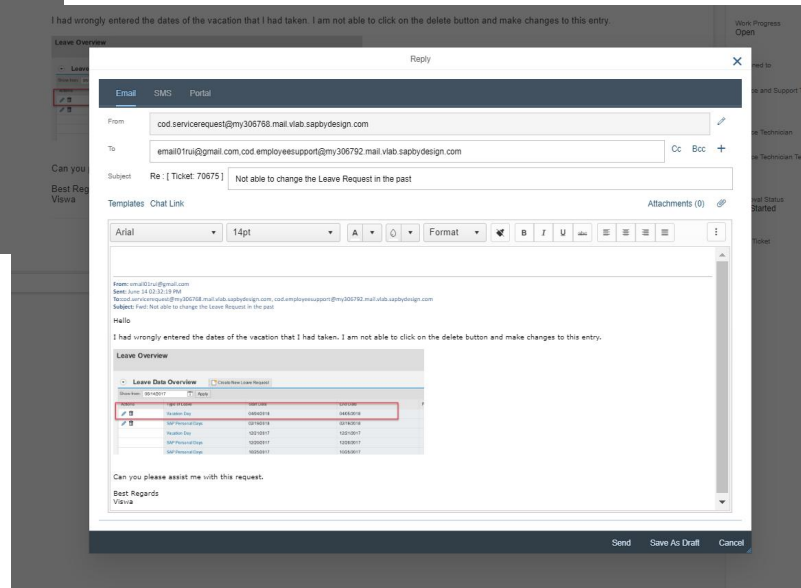
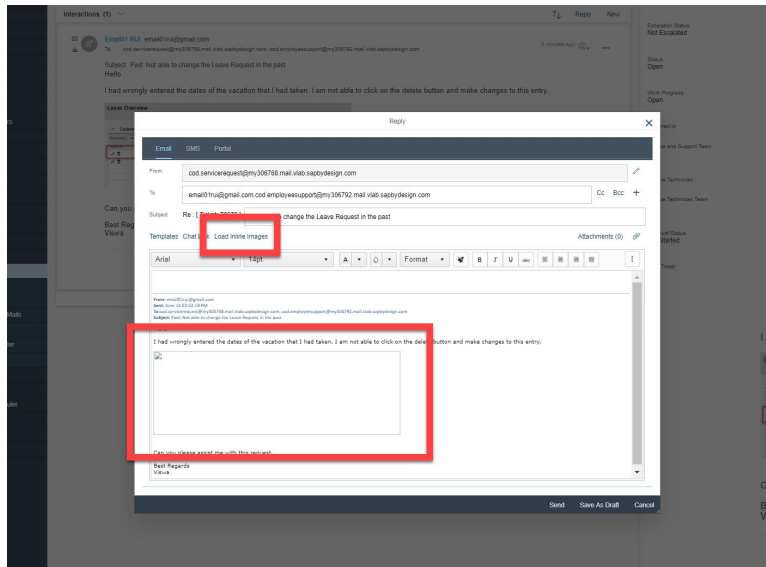
### E-Mail

- § System notification if issues with E-Mail Server ( Phased Delivery)
- § Response Feeder – Disable SMS and Chat Link if not set up.
- § Response Feeder - Set Default Font and Size

### Social in Fiori Client

- § Facebook/ Twitter

# Response Feeder – Support Forwarding/Reply of Inline Images in E-Mails



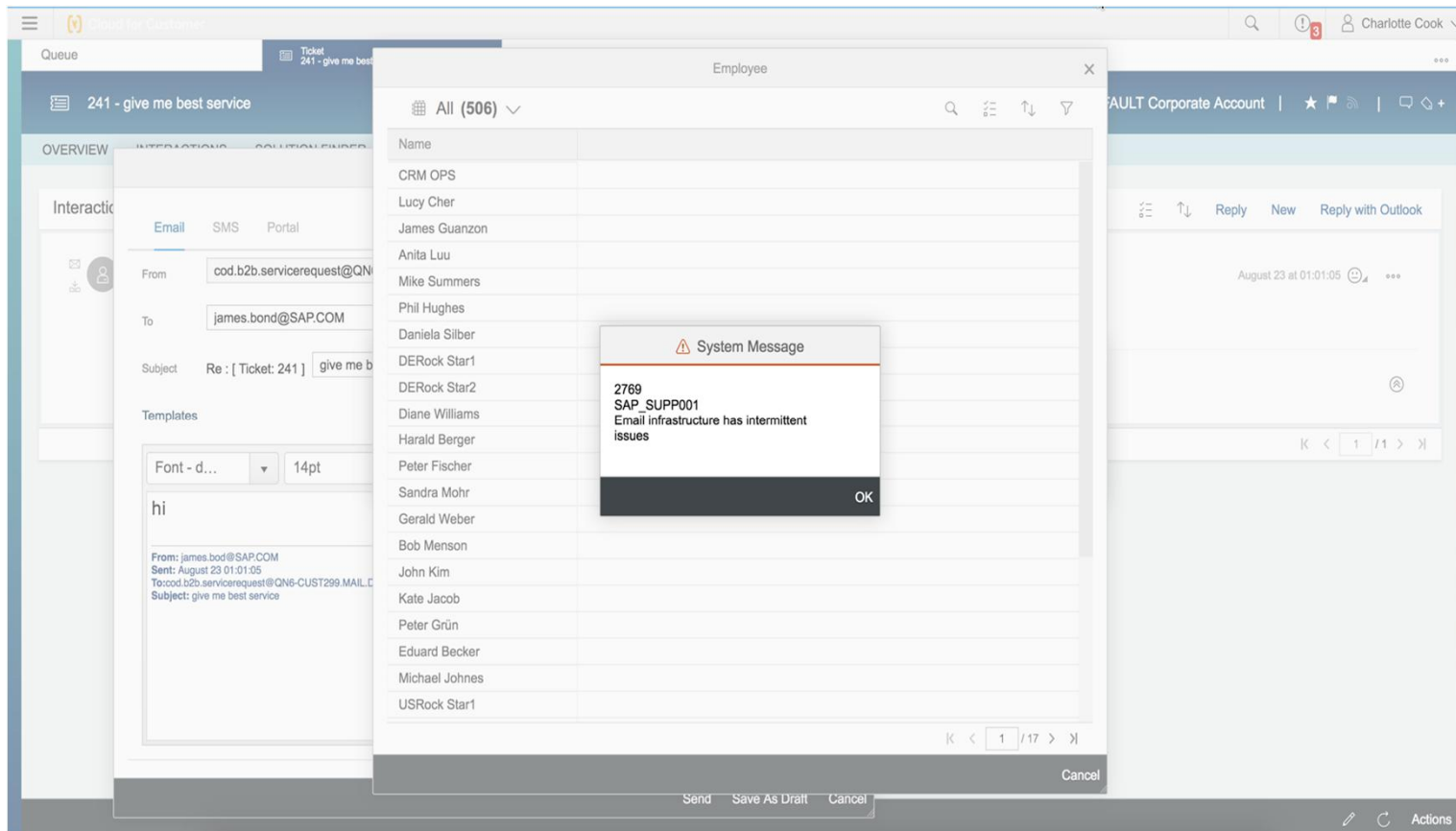
## Business Description of Feature

- § Enable the agent to include the images that were part of the incoming e-mail when forwarding or replying an e-mail
- § New option 'insert inline image' to decide whether the images should be added to response or not.

## Key Business Benefits

- § Enhanced collaboration opportunity, where the agent can make his responses in context of the images he has received from the customer

# E-Mail Channel – System notification if issues with E-Mail Server



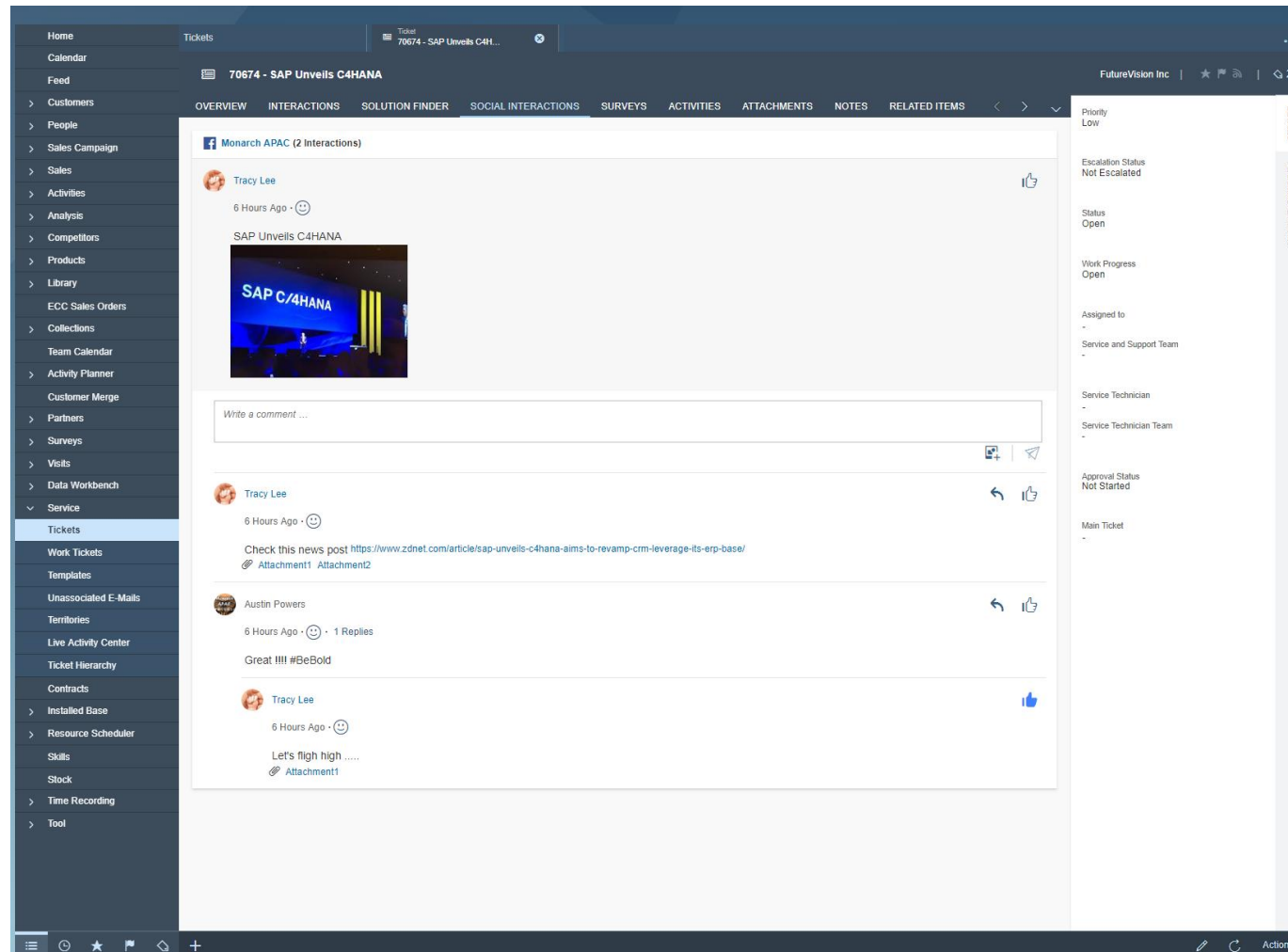
## Business Description of Feature

- § System notification to all the logged in user in case there is an issue with the E-mail Server.
- § Feature will only be enabled in tenants on a request basis.

## Key Business Benefits

- § Agents can be informed in case there is a connectivity issue with the E-Mail Server.

# Social – Facebook/Twitter in Fiori Client



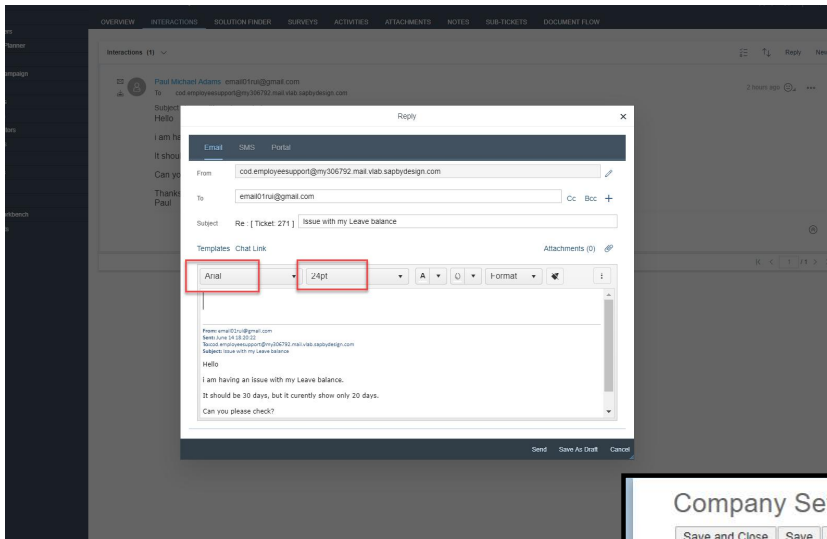
## Business Description of Feature

- § Enable Facebook/Twitter channels in Fiori Client.
- § New Facet added 'Social Interaction' to the Ticket UI.
- § New configuration to enable the Social Interactions Facet on the Ticket UI.
- § Remaining channels coming with next releases.

## Key Business Benefits

- § Enhanced use experience for the Social Channels in Fiori Client.
- § Contextual response options.
- § Display of images in the context of the message.

# Response Feeder – Set Default Font and Size



### Company Settings

Save and Close Save Close Discard Changes

You can define the company settings for all users or a selected business role. For the changes to reflect, you must log off and then log on.

Define settings for: Company

General Theme Auto Logoff Client Signature UI Controls

Define the default Text format for Fiori client.

Rich Text Editor

Default Font Type: Arial

Default Font Size: 14pt

## Business Description of Feature

- § In the E-Mail Response Feeder the font and size can be set to a Default value.
- § If the user changes the font and size, then the personalization is stored in the cache of the browser.

## Key Business Benefits

- § Achieve uniformity in the e-mails that are being sent out by the agents.

# What's New in Ticket & Time Recording



# What's New in 1808 for Ticket & Time Recording

## Key Innovations

### Ticket

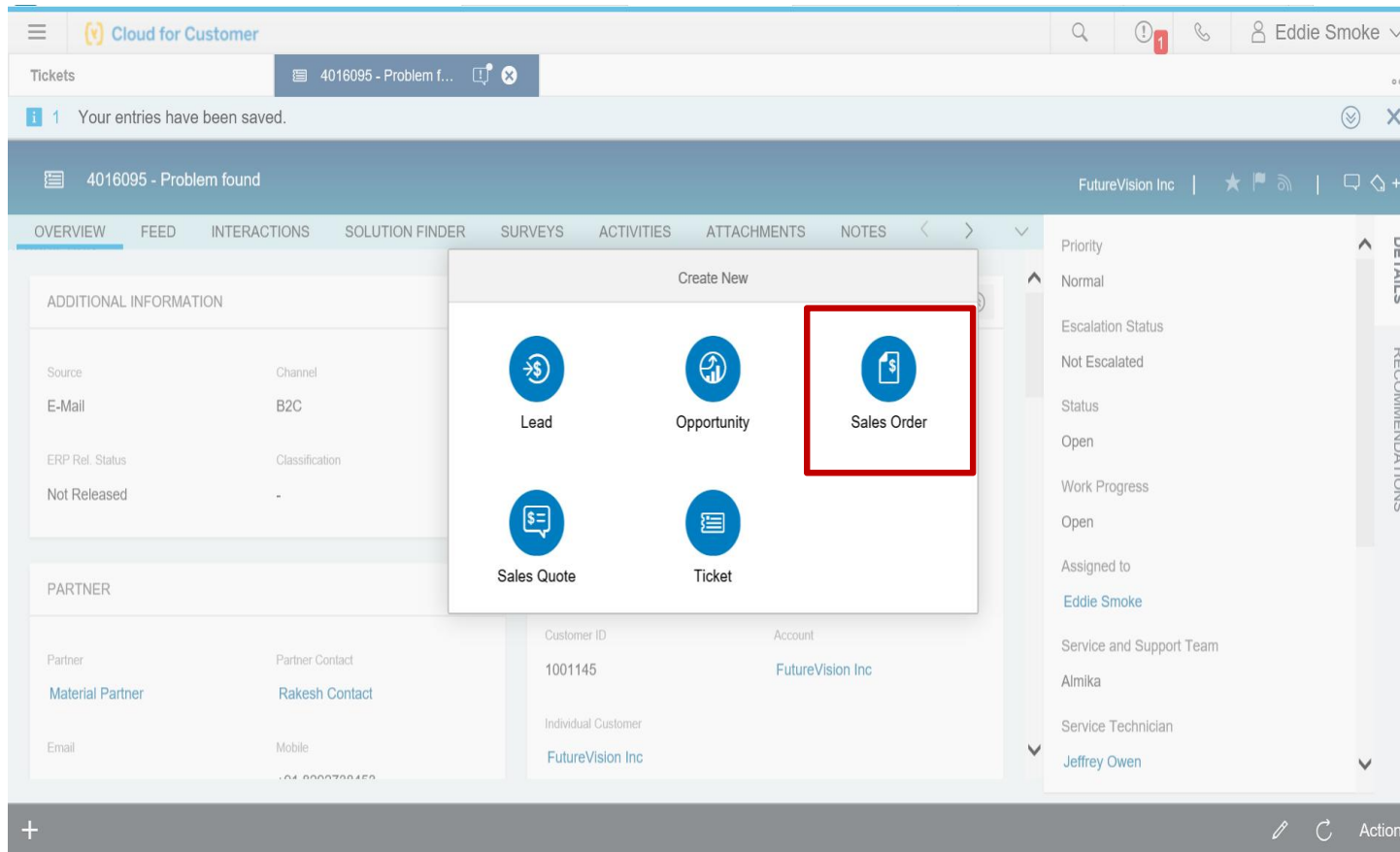
- § Create follow-up Sales Order from Ticket TI
- § Enable Payment Terms, Incoterms etc. for Ticket
- § Enable Blocking Terms for Ticket
- § Enable Credit Check for Ticket
- § Restrict the creation of new Tickets based on business roles
- § Query to filter team based on employee
- § Scoping question for Processor & Team consistency check
- § Enable Employee & Partner sections in Ticket in FIORI

## Additional Enhancements

### Ticket

- § New "System Item processing" type "Sales Order"
- § Enable Image Views and Thumbnail View

## Topic Area: Ticket - Create follow-up sales order from ticket TI



### Business Description of Feature

§ Users can create a sales order as a follow-up for a ticket in ticket screen ( both from “+” sign on the Ticket screen and in the Related Items facet for HTML 5 & Fiori).

### Key Business Benefits

This would help in up-sell and cross-sell scenarios.

## Topic Area: Ticket - Enable Payment Terms, Incoterms...

The screenshot shows the SAP Cloud for Customer interface for a ticket titled "38580 - 'Resolution is Due ... Act Fast'". The interface includes a top navigation bar with a search icon, a notification bell with 16 alerts, and a user profile for Eddie Smoke. Below the navigation bar is a tabbed interface with tabs for OVERVIEW, INTERACTIONS, SOLUTION FINDER, SURVEYS, ACTIVITIES, ATTACHMENTS, NOTES, RELATED ITEMS, and ITEMS. The OVERVIEW tab is selected, showing a detailed view of the ticket. The ticket details are organized into several sections: CUSTOMER, SERVICE LOCATION, WORK DESCRIPTION, INTEGRATION, and PRODUCT. The INTEGRATION section is highlighted with a red box, indicating the new fields being discussed. The INTEGRATION section contains the following fields:

| INTEGRATION                           |                                |
|---------------------------------------|--------------------------------|
| Sales Organization                    | Sales Unit                     |
| Sales Unit US                         | Sales Unit US                  |
| Distribution Channel                  | Division                       |
| Direct sales                          | Division 1                     |
| Payment Terms                         | Incoterms                      |
| 10 days 2% cash discount, 20 days net | Carriage and insurance paid to |
| Incoterms Location                    | Delivery Priority              |
| San Jose                              | Immediate                      |
| Order Block                           | Delivery Block                 |
| Overall block                         | Bottleneck material            |
| Billing Block                         |                                |
| Calculation missing                   |                                |

The right sidebar shows a list of details for the ticket, including Type (Field Service (Z)), Priority (Normal), Escalation Status (Not Escalated), Status (Open), Work Progress (Open), Assigned to (Jeffrey Owen), Service and Support Team (Level 1 Support Queue), Service Technician (Suman Bandopadhyay), Service Technician Team (Social Queue- Entertainment), and Approval Status (Approval not Necessary).

### Business Description of Feature

§ Ticket is now updated with new fields Payment Terms, Incoterms, Incoterms Location and Delivery Priority from Account based on the sales area of the Ticket.

§ These fields are also added in:

- § Ticket Workflow
- § Ticket Approval
- § Ticket Data Source

### Key Business Benefits

§ Users can now add/edit these fields in Ticket itself.

### Note

§ These fields are updated only on change of Sales Area of the Ticket.

# Topic Area: Ticket - Enable Blocking terms for Ticket

The screenshot shows the SAP Cloud for Customer interface for a ticket titled "38580 - 'Resolution is Due ... Act Fast'". The interface is divided into several sections:

- CUSTOMER:**
  - Customer: FutureVision
  - Contact: Sara Smith
  - E-Mail: sarasmithdemo@gmail.com
  - Phone: +1 650-714-9930
- SERVICE LOCATION:**
  - Street: East Adams Street
  - City: Springfield
  - State: Connecticut
  - Postal Code: 62701
- WORK DESCRIPTION:** (Empty field)
- INTEGRATION:**
  - Sales Organization: Sales Unit
  - Sales Unit US: Sales Unit US
  - Distribution Channel: Division
  - Direct sales: Division 1
  - Payment Terms: Incoterms
  - 10 days 2% cash discount, 20 days net: Carriage and insurance paid to
  - Incoterms Location: Delivery Priority
  - San Jose: Immediate
- Blocking Terms (highlighted in a red box):**
  - Order Block
  - Overall block
  - Billing Block
  - Calculation missing
  - Delivery Block
  - Bottleneck material
- PRODUCT:** (Empty field)
- DETAILS:**
  - Type: Field Service (Z)
  - Priority: Normal
  - Escalation Status: Not Escalated
  - Status: Open
  - Work Progress: Open
  - Assigned to: Jeffrey Owen
  - Service and Support Team: Level 1 Support Queue
  - Service Technician: Suman Bandopadhyay
  - Service Technician Team: Social Queue- Entertainment
  - Approval Status: Approval not Necessary

## Business Description of Feature

- § Ticket is now updated with new fields Order Block, Billing Block and Delivery Block from Account based on the sales area of the Ticket.
- § These fields are read only in Ticket.
- § These fields are added in:
  - § Ticket Workflow
  - § Ticket Approval
  - § Ticket Data Source

## Key Business Benefits

- § This would help to see if any customer is blocked before providing a service to them.

## Note

- § These fields are updated only on change of Sales Area of the Ticket.

# Topic Area: Ticket - Credit Check

**PRICING DATA**

|                   |                  |
|-------------------|------------------|
| Currency          | Planned Total    |
| USD               | 127,00 EUR       |
| Total             | Credit Status    |
| 1.651,00 EUR      | Limit Exceeded   |
| Credit Limit      | Credit Exposure  |
| 10.000.000,00 EUR | 6.763.744,08 EUR |

**PRODUCT**

|                             |                    |
|-----------------------------|--------------------|
| Product                     | Description        |
| Coffee machine Java de luxe | Hardware           |
| Installed Base              | Installation Point |
| -                           | 162                |
| Serial ID                   | Warranty           |
| 1357-8642-XA                | -                  |
| Coverage                    | Warranty To        |
| Warranty 50%                | -                  |
| Product ID                  |                    |
| 10000795                    |                    |

**ADDITIONAL INFORMATION**

|                   |         |
|-------------------|---------|
| Source            | Channel |
| Manual data entry | Manual  |

**TIMELINE**

|                    |                          |
|--------------------|--------------------------|
| Initial Review Due | Initial Review Completed |
|--------------------|--------------------------|

**CUSTOMER**

|                          |         |
|--------------------------|---------|
| Customer                 | Contact |
| Cumulus Cloud Operations | -       |

## Business Description of Feature

§ Ticket is now updated with new fields Credit Status, Credit Limit and Credit Exposure from SAP ERP system when clicking the action "Get External Pricing".

§ Credit Status is added in:  
§ Ticket Approval

## Key Business Benefits

§ Customers can check the credit status, credit limit and credit exposure in the ticket before providing any service.

# Topic Area: Ticket - New "System Item processing" type "Sales Order"

## Item Processing Codes

Version: **Customer Specific** Business Option: **Service: Customer Care: Service Request Management: Tickets for Customer Support**

Save and Close Save Close Translate Determination Table

New values must start with Z or Y.

Add Row Delete

| Processi Code | Description                      | System Processing Type                   | Invoicing Method                       | Assigned to T...     | Pricing Relevant                    | Scheduling Method                | ERP Relevant                        | ATP Check Relevant                  |
|---------------|----------------------------------|--|--|----------------------|-------------------------------------|----------------------------------|-------------------------------------|-------------------------------------|
| EXP0          | Expenses                         | Billing Request                          | Fixed Price                            | Expenses             | <input checked="" type="checkbox"/> | <input type="text"/>             | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| SEP1          | External procurement             | External Procurement                     | Not Relevant                           | Service              | <input checked="" type="checkbox"/> | <input type="text"/>             | <input type="checkbox"/>            | <input type="checkbox"/>            |
| SIC1          | Item Confirmation                | Item Confirmation                        | Not Relevant                           | Service              | <input checked="" type="checkbox"/> | <input type="text"/>             | <input type="checkbox"/>            | <input type="checkbox"/>            |
| SIP1          | Item Planning                    | Item Planning                            | Not Relevant                           | Service              | <input checked="" type="checkbox"/> | <input type="text"/>             | <input type="checkbox"/>            | <input type="checkbox"/>            |
| SRCM          | Complaint Item                   | Complaint Request                        | Not Relevant                           |                      | <input checked="" type="checkbox"/> | <input type="text"/>             | <input type="checkbox"/>            | <input type="checkbox"/>            |
| SRP0          | Billing Request                  | Billing Request                          | Time and Material                      | <input type="text"/> | <input checked="" type="checkbox"/> | Appointment <input type="text"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| SRP1          | Part Consumption from Techniciar | Part Consumption from Technician Stock   | Time and Material                      | Parts                | <input checked="" type="checkbox"/> | <input type="text"/>             | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| SRP2          | Part Consumption from Consignm   | Part Consumption from Customer Consignn  | Time and Material <input type="text"/> | Parts                | <input checked="" type="checkbox"/> | <input type="text"/>             | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| SRP3          | Part Advance Shipment            | Part Advance Shipment to Customer Consig | Not Relevant                           | Parts                | <input checked="" type="checkbox"/> | <input type="text"/>             | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| SRP4          | Part Return from Consignment Stc | Part Return from Customer Consignment Si | Not Relevant                           | Parts                | <input checked="" type="checkbox"/> | <input type="text"/>             | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| SRS1          | Time                             | Time                                     | Time and Material                      | Time                 | <input checked="" type="checkbox"/> | <input type="text"/>             | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| SRV1          | Service                          | Billing Request                          | Fixed Price                            | Service              | <input checked="" type="checkbox"/> | <input type="text"/>             | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| SSO1          | Sales Order                      | Sales Order                              | Not Relevant <input type="text"/>      | Service              | <input type="checkbox"/>            | <input type="text"/>             | <input type="checkbox"/>            | <input type="checkbox"/>            |

## Business Description of Feature

§ A new system processing type 'Sales Order' is added in the list of system processing types available for Ticket items under Item Processing Codes in Business Configuration.

## Key Business Benefits

§ Customers can use this processing code for creating Sales Order in ERP.

## Topic Area: Ticket - Restrict the creation of new tickets

Business Role: SERVICE TECHNICIAN - Service Technician

Status: **Active** Obsolete: **No**

Save Close Copy Assigned Users Actions

General Work Center and View Assignments Access Restrictions UI Switches Fields & Actions Assigned Business Users Changes Notes

| Name | Business Context | UI Text | Access Restriction |
|------|------------------|---------|--------------------|
|------|------------------|---------|--------------------|

No records found

Extension Field Restrictions


Add Row Remove

| Name | Business Context | Access Restriction |
|------|------------------|--------------------|
|------|------------------|--------------------|

No records found

Business Action Restrictions

Add Row Remove

| Name                   | Business Context   | UI Text | Access Restriction |
|------------------------|--|---------|--------------------|
| CREATE_SERVICE_REQUEST |  Ticket | Create  | Disabled           |

### Business Description of Feature

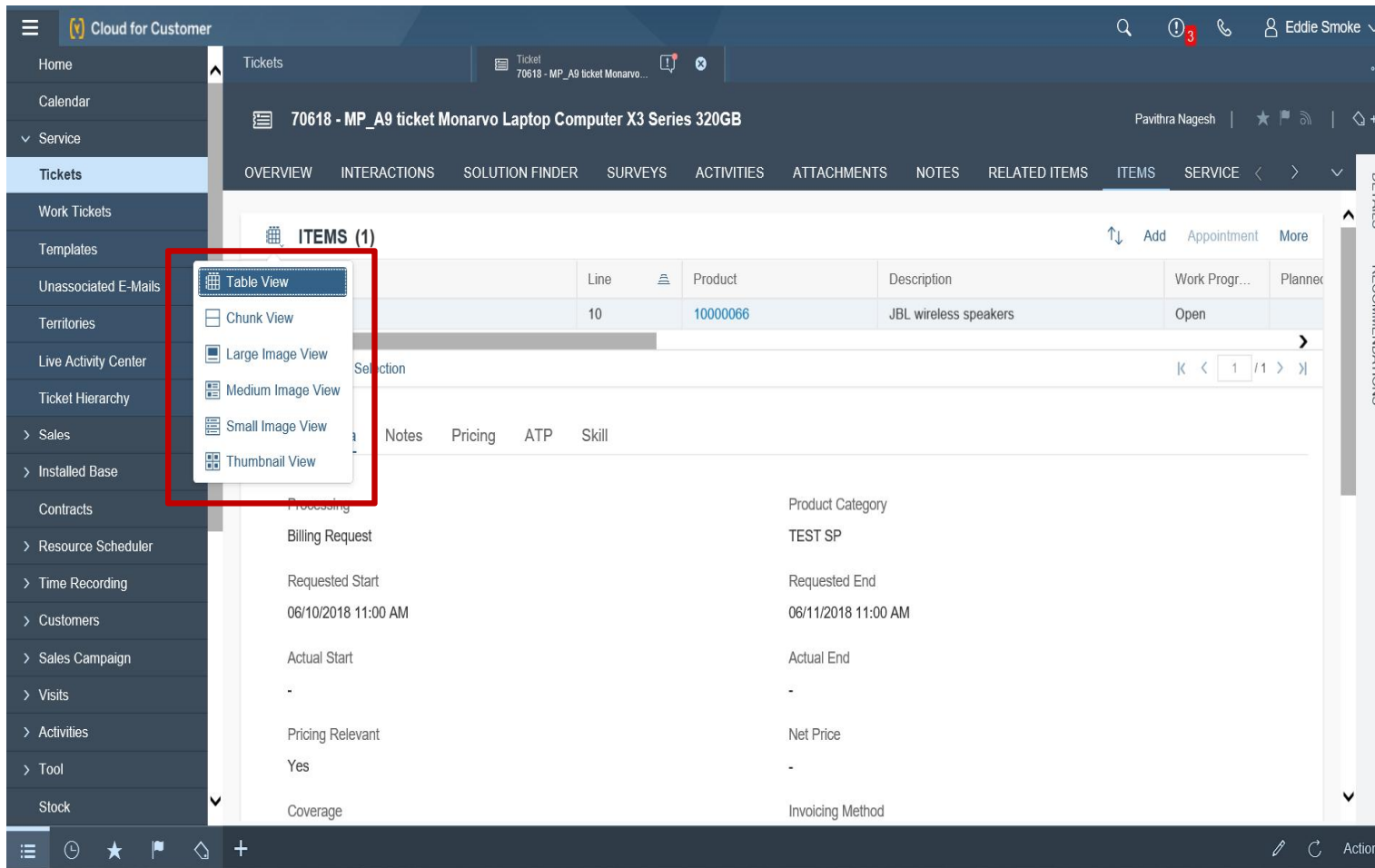
§ Customers can restrict the creation of new ticket based on business roles via Access Restrictions for Fields & Actions.

### Key Business Benefits

§ This will help customers to restrict the creation of tickets to few users based on their business roles.

§ **Note:** This is only enabled online currently.

## Topic Area: Ticket – Enable Image Views and Thumbnail View



The screenshot displays the SAP Cloud for Customer interface for a ticket titled '70618 - MP\_A9 ticket Monarvo Laptop Computer X3 Series 320GB'. The 'ITEMS (1)' table is visible, showing a single item with the following details:

| Line | Product  | Description           | Work Progr... | Planned |
|------|----------|-----------------------|---------------|---------|
| 10   | 10000066 | JBL wireless speakers | Open          |         |

The view selection menu is open, showing the following options:

- Table View (highlighted with a red box)
- Chunk View
- Large Image View
- Medium Image View
- Small Image View
- Thumbnail View

### Business Description of Feature

- § Image views (Small, Medium and Large) and Thumbnail view are enabled as alternate visualization.
- § It is applied in Tickets for:
  - § Items
  - § Products
  - § Involved Parties such as Employees, Customer, Accounts...

### Key Business Benefits

- § This will provide customers the flexibility of different visualizations.
- § Note: Image column is personalized hidden.

# What's New in **Utilities**



# What's New in 1808 for Utilities

## Key Innovations

- § Advance Metering Infrastructure – Phase 1
- § View BPEM exception cases in Customer and Premise
- § Create Miscellaneous Postings
- § Promise to Pay
- § Fix Address in Contract Account

## Additional Enhancements

- § Long text support for service order and service notification
- § Hyperlink for Utilities Financial filtered Contract Account
- § Limiting number of records for service order
- § Performance Optimization for Utility processes

# Utilities: Advance Metering Infrastructure (AMI) – Phase 1

**AMI Status and Meter Information**

Object Hierarchy (1)

| Name                             | ID    | Description  |
|----------------------------------|-------|--|
| Installation / Point Of Delivery | 16716 | Electricity / Rate category E1 - Electricity rate category 1 |
| Device                           | 12    | AMI device category - Active                                 |

Meter Information (1)

| Meter ID | Type           | System Status | User Status | Device Category | Device Category Description | Register Group | AMI Meter                           | AMI Status | Remote Connect                      |
|----------|----------------|---------------|-------------|-----------------|-----------------------------|----------------|-------------------------------------|------------|-------------------------------------|
| 12       | IS-U Equipment | Installed     |             | DEV_CAT_AMI1    | AMI device category         | RG_GRP         | <input checked="" type="checkbox"/> | Active     | <input checked="" type="checkbox"/> |

1 selected | [Clear Selection](#)

Remote Connect | Remote Disconnect | Remote Meter Reading | Manual Meter Reading with AMS | On-Demand Meter Reading | Request Operational State | Receive Text Messages

|                                     |                                     |                                     |                          |                                     |                                     |                                     |
|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|

**If it's an AMI meter, then the table will show additional columns for AMI capabilities**

## AMI

- § Ability to see AMI meters in
  - § Customer – Utilities 360 hierarchy
  - § Premise – Connection Details
- § New meter information table to provide details for AMI and Non-AMI meters

## Key Business Benefits

- § Ability to see information such as system status, device category, and register group for all meters
- § Ability to view AMI status in the hierarchy
- § If it is an AMI meter, then the AMI related capabilities will be available dynamically

# Utilities: View of BPEM Exception Cases

| UTILITIES EXCEPTIONS UTILITIES SERVICE NOTIFIC... UTILITIES SERVICE ORDERS UTILITIES SALES POD ACTIVITIES ADDRESSES OVER <span>&lt;</span> <span>&gt;</span> <span>⌵</span> |      |                              |          |          |                      |                                |           |              |            |        |
|---|------|------------------------------|----------|----------|----------------------|--------------------------------|-----------|--------------|------------|--------|
| <div> <span>Exceptions (4)</span> <span>🔍</span> <span>☰</span> <span>↕</span> <span>⌵</span> <span>Refresh</span> </div>   |      |                              |          |          |                      |                                |           |              |            |        |
| Overdue   | Case | Case Description             | Status   | Priority | Service Ticket ID    | Category                       | Processor | Processor ID | Changed On | Change |
| ●   | 1005 | Billing Inquiry              | In Pr... | High     | <a href="#">2662</a> | End Service - SD Contract Item | Tina Kuo  | I822257      | 05/29/2018 | I82225 |
| ●   | 978  | Billing Inquiry              | New      | High     | <a href="#">2772</a> | End Service - SD Contract Item |           |              |            |        |
| ●   | 977  | Meter Reading Inquiry        | New      | High     | <a href="#">2762</a> | End Service - SD Contract Item |           |              |            |        |
| ●   | 965  | Green Energy Program Inquiry | New      | High     |                      | End Service - SD Contract Item |           |              |            |        |
| <div> 1 selected   <a href="#">Clear Selection</a> <span>⏪</span> <span>&lt;</span> <span>1</span> <span>/ 1</span> <span>&gt;</span> <span>⏩</span> </div>                 |      |                              |          |          |                      |                                |           |              |            |        |
| <div>Notes</div> <div> 05/29/2018 06:05 PI User Technical Q5J<br/>Ticket ID :2662 </div> <div>Notes :</div> <div> 29.05.2018 06:26 Tina Kuo </div>                          |      |                              |          |          |                      |                                |           |              |            |        |

## View Exception Cases

- § Ability to view BPEM (Business Process Exceptions Management) exception cases in customer and premise objects
- § Ability to see recent notes for each exception case
- § Ability to view linked tickets

## Key Business Benefits

- § Ability to see information for existing exceptions from the backend to
- § Ability to view linked tickets
- § Ability to view AMI status in the hierarchy
- § If it is an AMI meter, then the AMI related capabilities will be available dynamically

# Utilities: Fixed Address in Contract Account

Home 3001

OVERVIEW LOCKS SALES QUOTES

Contract Account Info.

|             |                       |
|-------------|-----------------------|
| ID          | Category              |
| 3001        | IS-U Contract Account |
| Customer ID | Customer External ID  |
| 86735       | 86736                 |

Address Details

Fix Address

100 Amber Lane / Palo Alto 94034

Edit Contract Account

|                          |                                      |
|--------------------------|--------------------------------------|
| ID                       | External ID                          |
| 3001                     | 1097750                              |
| Category                 | Name                                 |
| IS-U Contract Account    | My account                           |
| Account Class            | Acc. Determination ID                |
| Private Customers        | Residential Customers                |
| Dunning Procedure        | Tolerance Group                      |
| Dunning Procedure 01     | Tolerance Group 0001, 2 EUR Absolute |
| Payment Terms            | Legacy Contract Account              |
| Zpayment Terms           |                                      |
| Budget Billing Procedure | Fix Address                          |
| Payment Scheme           | 100 Amber Lane / Palo Alto 94034     |
| Bill Form                | Coll. Cont. Acc.                     |

Save Cancel

Fix Address

(3)

| Address                                  | Valid From | Valid To  |
|--|------------|-----------|
| 100 Amber Lane / Palo Alto 94034         | 18.01.2018 | Unlimited |
| 300 Happy Street / Santa Clara CA 95051  | 16.02.2018 | Unlimited |
| 200 Bubble Street / Santa Clara CA 95051 | 16.02.2018 | Unlimited |

## Fixed Address

- § Ability to create, edit, and remove fixed address in contract account
- § Ability for the user to select the customer's valid address to be used for fix address

# Utilities: Manual Postings in Utilities Financials

Create Manual Posting

Configuration setting for description and default amount for reasons

## Manual Posting

- § Ability to create manual posting from the open items table in Utilities Financials
- § Ability to configure default value based on posting reason
- § Ability to configure description for the reasons

Manual Posting

Cont. Acc. Ext. 1097750 Contract Account Name My account

Posting Reason Good Faith credit of 25 Amount 25,00 EUR

Create Posting Cancel

| Manual Posting |                         |        |
|----------------|-------------------------|--------|
| Reason         | Description             | Amount |
| CREDIT1        | Good Faith credit of 25 | 25     |
| DEBIT1         | Customer service charge | 50     |

# Utilities: Service Order / Service Notification Long Text

The screenshot shows the 'Edit Service Order' dialog box with the following fields:

- Service Address: 3500 Lenox Road T12, Atlanta US 30326
- Status
- Document Received
- Start Date: 06/01/2018, 00:00
- End Date: 06/01/2018, 00:00
- Description: This makes texting a quick : [Long Text](#)

The 'Long Text' dialog box displays the following text:

This makes texting a quick and easy way to communicate with friends and colleagues, including in contexts where a call would be impolite or inappropriate (e.g., calling very late at night or when one knows the other person is busy with family or work activities). Like e-mail and voice mail, and unlike calls (in which the caller hopes to speak directly with the recipient), texting does not require the caller and recipient to both be free at the same moment; this permits communication even between busy individuals. Text messages can also be used to interact with automated systems, for example, to order products or services from e-commerce websites, or to participate in online contests. Advertisers and service providers use direct text marketing to send messages to mobile users about promotions, payment due dates, and other notifications instead of using postal mail, email, or voicemail.

Buttons: Back, Cancel

## Key Business Benefits

- § Service Order and Service Notification to support long text in view and edit capabilities

## Utilities: Limit search result on service orders

### Max No. of Hits

- § New field *Max No. of Hits* included in the advanced search filter for service orders. Results are displayed in descending order using date & time stamp.

The screenshot displays the SAP Cloud for Customer interface. On the left is a navigation menu with options: Home, Calendar, Sales Quotes, Campaigns, Utilities, Customers, Accounts (highlighted), Contacts, Individual Customers, and Service. The main area shows the 'Accounts' section for 'CreamBiscuit'. A tab bar at the top includes 'UTILITIES CONTRACTS', 'UTILITIES FINANCIALS', 'UTILITIES 360', 'UTILITIES SERVICE NOTIFIC...', and 'UTILITIES SERVICE ORDERS' (selected). Below this, the 'Service Orders (6)' section is visible. It contains several search filters: 'Service Order ID', 'Service Order Type', 'Customer ID' (set to 1012101), 'Premise ID', 'Start Date' (with a 'Filter by date' dropdown), 'User Status', and 'System Status'. A red box highlights the 'Max. No. Of Hits' field, which is set to 30. The interface also includes a top bar with 'Cloud for Customer' and a user profile 'CallCenter Agent1'.

# Performance Optimization in Utilities Financials tab

The screenshot displays the SAP Cloud for Customer interface for the Utilities Financials tab. The left sidebar contains navigation options: Home, Calendar, Sales Quotes, Campaigns, Utilities (expanded), Customer Search (selected), Premise, Contract Account, Sales POD, Customers, Service, Activities, Analysis, Products, Data Workbench, Installed Base, and TestUtils. The main content area shows the Utilities Financials tab selected, with a sub-tab for Customer Search. The search results for Charles Maxwell show a Customer Must Pay Amount of 4,121.45 EUR and a Customer Total Balance of 5,086.45 EUR. Below this, a table lists contract accounts with columns for Contract Account ID, Must Pay Amount, Name, Total Balance, and Recent Dunning. The table shows one contract account with ID 1097750 and a Must Pay Amount of 4,121.45 EUR. To the right, a 'Recent Interactions' table shows two manual interactions with IDs 2896 and 2662, both described as 'Billing Inquiry'. At the bottom, an 'Invoices (1)' table shows one invoice with ID 300007807, dated 04/04/2018, with an amount due of 5,016.45 EUR and a due date of 04/04/2018. The bottom bar contains various action buttons like Actions, Summary, Move In, Move Out, Transfer, Hierarchy, Create Contract Account, and Launch FOP.

Customer Search

Customer: Charles Maxwell

Charles Maxwell

Utilities Financials

Customer Must Pay Amount: 4,121.45 EUR

Customer Total Balance: 5,086.45 EUR

Refresh

Filter Contract Account

| Contract Account ID | Must Pay Amount |
|---------------------|-----------------|
| 1097750             | 4,121.45 EUR    |

| Name       | Total Balance |
|------------|---------------|
| My account | 5,086.45 EUR  |

Contract Account Details

Recent Dunning: -

Recent Interactions (--)

| Channel Name | ID   | Description     |
|--------------|------|-----------------|
| Manual       | 2896 | Billing Inquiry |
| Manual       | 2662 | Billing Inquiry |

Invoice Payments Open Items Installment Plan Payment Plan Premise Contracts with Meter Reading

Invoices (1)

| Invoice No | Invoice Date | Amount Due   | Due Date   | Open Amount  | Payments |
|------------|--------------|--------------|------------|--------------|----------|
| 300007807  | 04/04/2018   | 5,016.45 EUR | 04/04/2018 | 1,000.00 EUR |          |

Actions Summary Move In Move Out Transfer Hierarchy Create Contract Account Launch FOP

## Performance Optimization

§ Focused on overall performance of the *Utilities Financials* facet.

# What's New in Approvals & Involved Parties for Lead, Opportunity



# What's New in 1808 for Approvals in Lead, Opportunity, Sales Order, Ticket

## Key Innovations

### Leads & Opportunities

- § Enhanced Approvals:
  - Withdraw from approval
  - Approve from within approval email
  - Inclusion of summary PDF in approval email (Opportunity only)
  - Approval by 2<sup>nd</sup>/3<sup>rd</sup> level manager

### Sales Order

- § Withdraw from Approval
- § Enhanced Approval Workflow – Multi-level Approvers
- § Standard Involved Parties Configuration enhanced for “Take over”

## Key Innovations

### Ticket

- § Ticket Approval - Added new conditions
- § Execute party determination rules while creating Ticket from Registered Product
- § Enhanced Party Determination for Standard Parties

# Leads and Opportunities: Enhanced Approval Processing

Approval Process : Opportunity

Status: **Draft** Changed By: Changed On:

Save and Close Close New

Add Row Remove

| Step | Process Step Name | Work Distribution       | Conditions         |
|------|-------------------|-------------------------|--------------------|
| 1    | Default step      | Responsible for Account | Conditions Defined |

Details: 1 - Default step

General Information

\* Step: 1

\* Process Step Name: Default step

Work Distribution

\* Work Distribution: Responsible for Account

Description:

All Approvals Required:

Automatic Approval:

Skip Reapproval:

Responsible for Account

2nd Level Reporting Line Manager

3rd Level Reporting Line Manager

Custom Defined Involved Party

Direct Approver

Functional Unit Manager

Involved Party Approver

Owner of Top Level Account of Opportunity

Reporting Line Manager

Responsible for Account

Territory Owner

Sales Empl... Sushant Potdar potdar.sushant@outl

CONTACTS (0)

Name

No data

No data

No data

Top Level Account

Source

Custom Status

Reason for Status

Next Status

In Approval

Sales Cycle

General Opportunity

Copy

Withdraw from Approval

Preview

Actions

Several new features have been introduced to enhance the approval process.

- § You can now include **2<sup>nd</sup> and 3<sup>rd</sup> level managers as approvers** of a lead or an opportunity
- § You can now **withdraw** an opportunity from approval
- § Approvers can now approve an opportunity via approve/reject links within the **approval email**
- § It is now possible to include an **opportunity summary PDF with an opportunity approval email** (opportunity only)

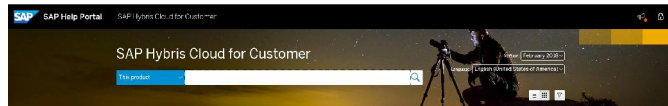
# Demo for Visit Geofencing



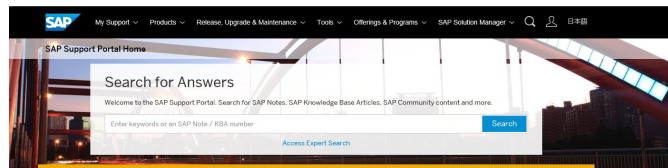
# Resources



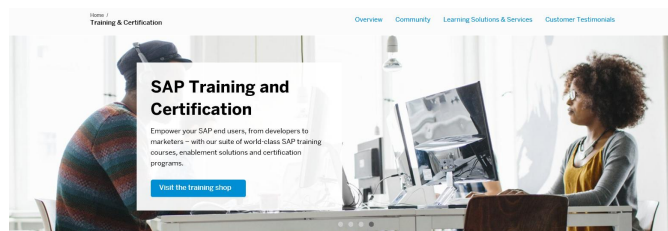
# Resources, Contact, Training and Engagement



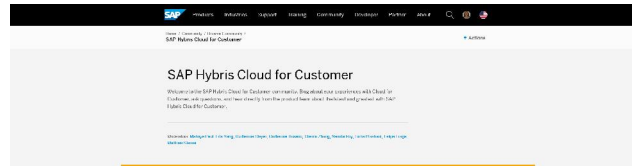
## SAP Help Portal



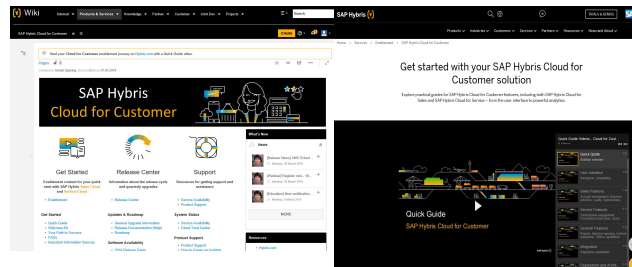
## SAP Support Portal



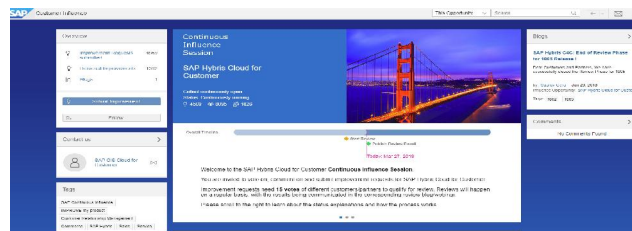
## SAP Training and Certification



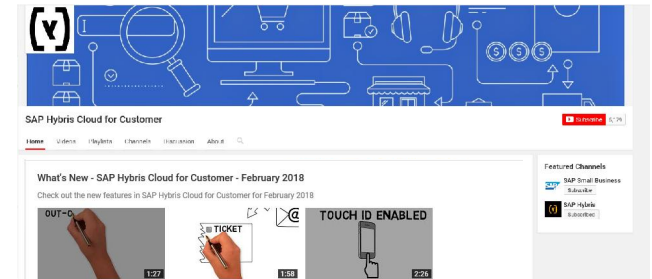
## SAP Community



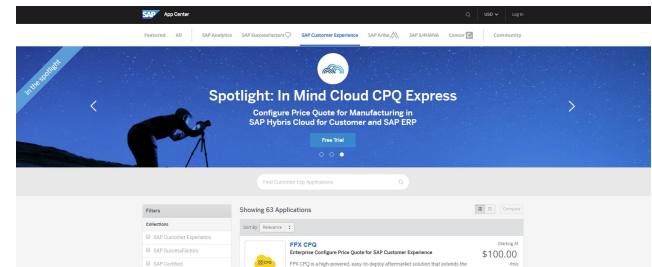
## SAP CX Wiki / cx.sap.com



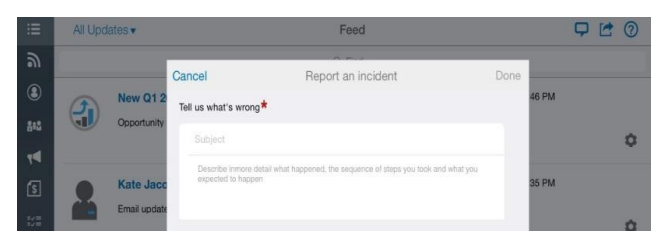
## SAP Customer Influence



## YouTube Channel



## SAP APP CENTER



## Incident Management (Embedded in Your Tenant)

# Thank you.

Contact information:

**Pragya Pande**  
SAP CX ES APJ

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