SAP Cloud for Customer in Sales and Service Cloud Release Preview Sales

Version 18.11 (Nov 2018)

SAP Customer Experience Product Management
Jack Nehmer, SAP
September 27, 2018

EXTERNAL

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1. Release Schedule
2. Announcements
3. Innovations - Sales
4. Resources

Enhanced and Updated on a Quarterly Schedule

SAP Cloud for Customer Innovation Cycle

February | May | August | November

- Line of Business Solution
- Industry Cloud Solution
- User Experience
- Packaged Integration
- Key User Enhancements

SAP Cloud for Customer – Nov 2018 (18.11) Release Planned Timeline

27 Sep 2018 – Planned Nov 2018 Pre-Release Conversation with Customers and Partners *~5 weeks to upgrade*

19 Oct 2018 – Planned Solution Release to Market

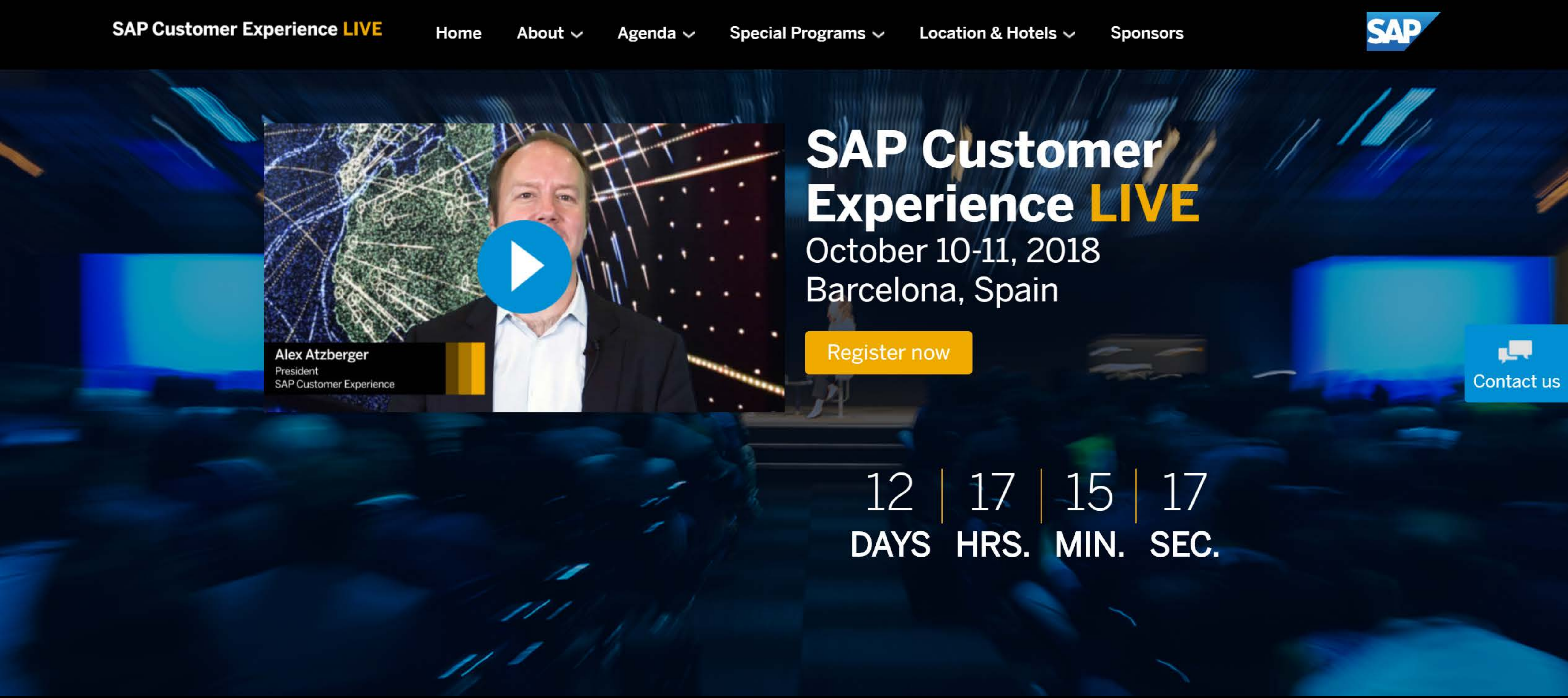
20 - 21 Oct 2018 – Planned Upgrade of Test Tenants *~2 weeks to upgrade*

30 Oct 2018 – Planned Nov 2018 Post-Release Overview for Customers and Partners

3 - 4 Nov 2018 – Planned Upgrade of Production Tenants *Upgrade Day 0*

Release Milestones

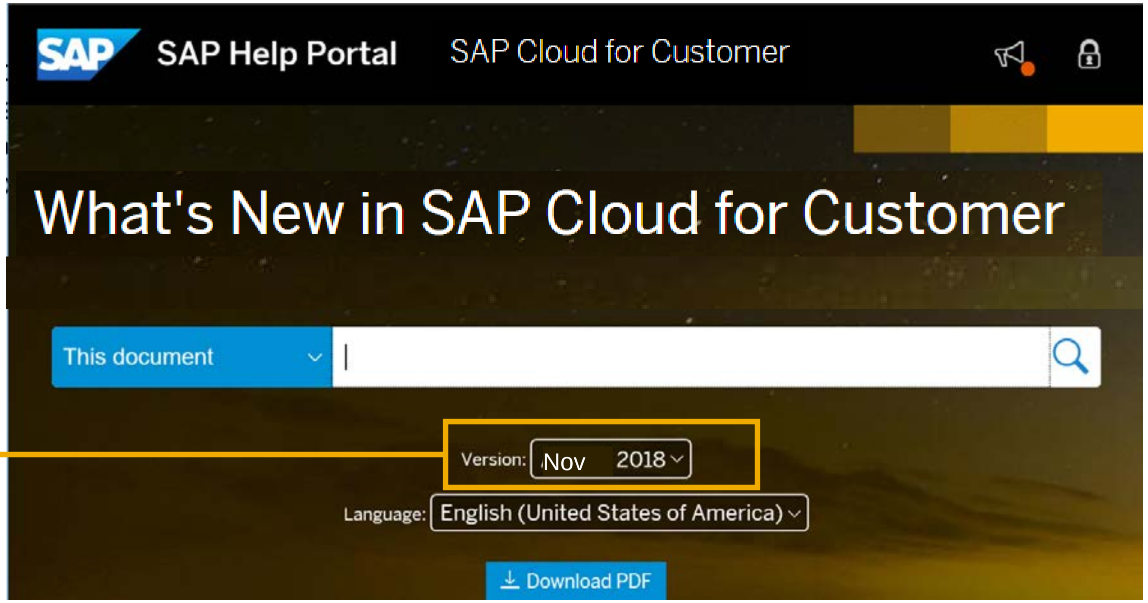
Release Webinars



https://events.sap.com/sap-cx-live/en/home

New Release Information - 1811 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.



As of 19th Oct, 2018 – you can expect to find the official 1811 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

Release Briefing content may not be complete

SAP Cloud for Customer
End of Life Announcement – HTML5 UI

In conjunction with our goals to streamline our UI offerings and free up development capacity for feature innovation, SAP is making the following announcement:

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 the HTML5 UI?

- 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.
- Any outstanding business user functionality (feature parity with HTML5 UI) is planned to be available in the Fiori client UI no later than the 1905 release.
- All key user functionality is planned to be available in Fiori client by 1911 release.

Sunset plans for Windows 10 phone and Windows 8.1

SAP has a made a strategic decision to sunset Windows 10 Mobile and Windows 8.1 support for the SAP Cloud for Customer extended edition apps with our May 2019 release

Key Factors driving this strategy:

- **Windows mobile is no longer under active development**
  - Microsoft has revealed that the company would no longer actively develop new features or hardware for Windows phones, citing its low market share, and the resultant lack of third-party software for the platform.
    Microsoft had largely abandoned its mobile business and having focused software efforts on providing apps and services compatible with Android and iOS instead. Development of Windows 10 Mobile will be limited to maintenance releases and patches.

    As the platform is not actively developed, introducing newer features that are supported on other modern mobile operating systems (an expected by customers) becomes increasingly difficult to achieve on Windows 10 mobile.

    Also, adoption of Windows 10 mobile is extremely low (almost negligible) in our user base
- **Windows 8.1 has reached the end of it’s lifecycle**
  - Microsoft has ended mainstream support for Windows 8.1 as of January 2018
  - Majority of our customers continue to use (and migrate from Windows 8.1 to) Window 10
- **SAP and SAP Customers would like to streamline the mobile experience**
  - Currently majority of our customers are on Windows 10 and there is an increasing trend of users moving onto Windows 10 from Window 8.1 and earlier versions
  - SAP continues to invest in expanding the capabilities of the Extended Edition mobile applications which include the latest improvements in offline capabilities on modern operating systems like iOS, Android and Windows 10. New capabilities are far easier to introduce and support on the new operating systems and keep all of our mobile capabilities in sync across the platforms.
- **Windows 8.1 continues to be supported for browser based usage of SAP Cloud for Customer**

SAP Cloud for Customer
End of Life Announcement – Original Migration Workbench

Over the past year, substantial investments have been made in the new Data Workbench tool as a way to meet the growing demands of customers around data migration.

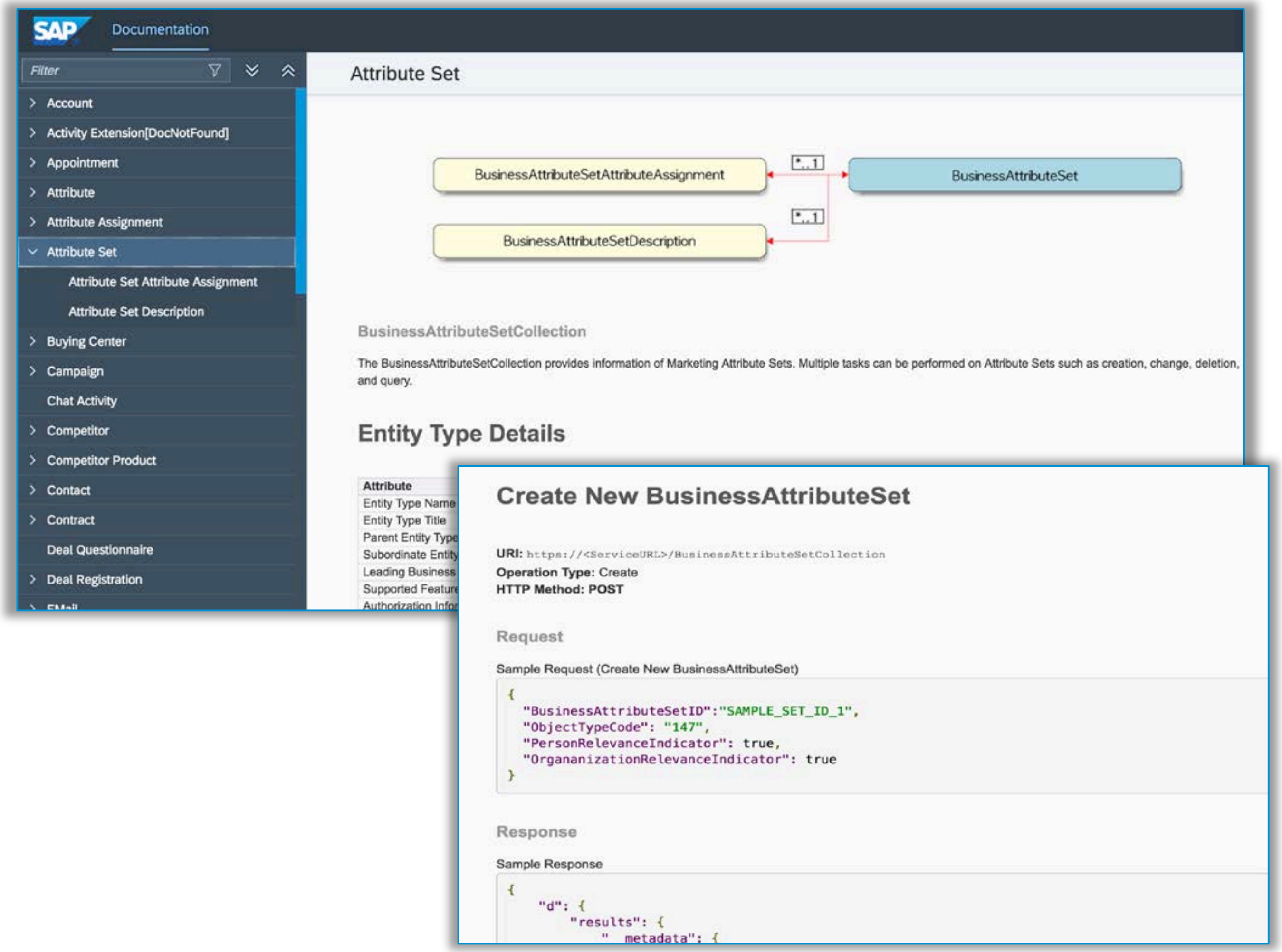
With this new tool now tested and in use by many of our customers, we are planning to **sunset the Migration Work Bench (MWB) in the timeframe of the 1902 release**.

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

Why the new Data Workbench?

- The 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
- Unlike the old Migration Workbench, the Data Workbench supports CSV format for imports, which saves time for customers as they will not be required to prepare import files in SAP pre-defined MS Excel templates
- The experience for the new tool is simplified with 2 primary models of data migration – Import & Export making the data migration activity more efficient

OData API V2 Series – General Announcement



A new series of OData APIs is being made available across the SAP Cloud for Customer application

- As of the 1808 release, the new OData API V2 (c4codataapi) series covers 40+ business objects, allowing read and/or write access to 1000+ collections (i.e. data points)
- In general, the OData protocol is superior to SOAP on both functionality and performance
- Another key advantage of the new technology approach will be to enable navigations between different business-object records (a.k.a. Cross-BO navigations) *
- In the future, the older OData API V1 series (c4codata) will be set to end-of-maintenance, see next slide for details.

Note: * Support for Cross-BO navigations are will be planned for a future release.

Expanded documentation features include:

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

SAP Cloud for Customer

Advance End of Maintenance Announcements – SOAP, A2X, OData V1 Series

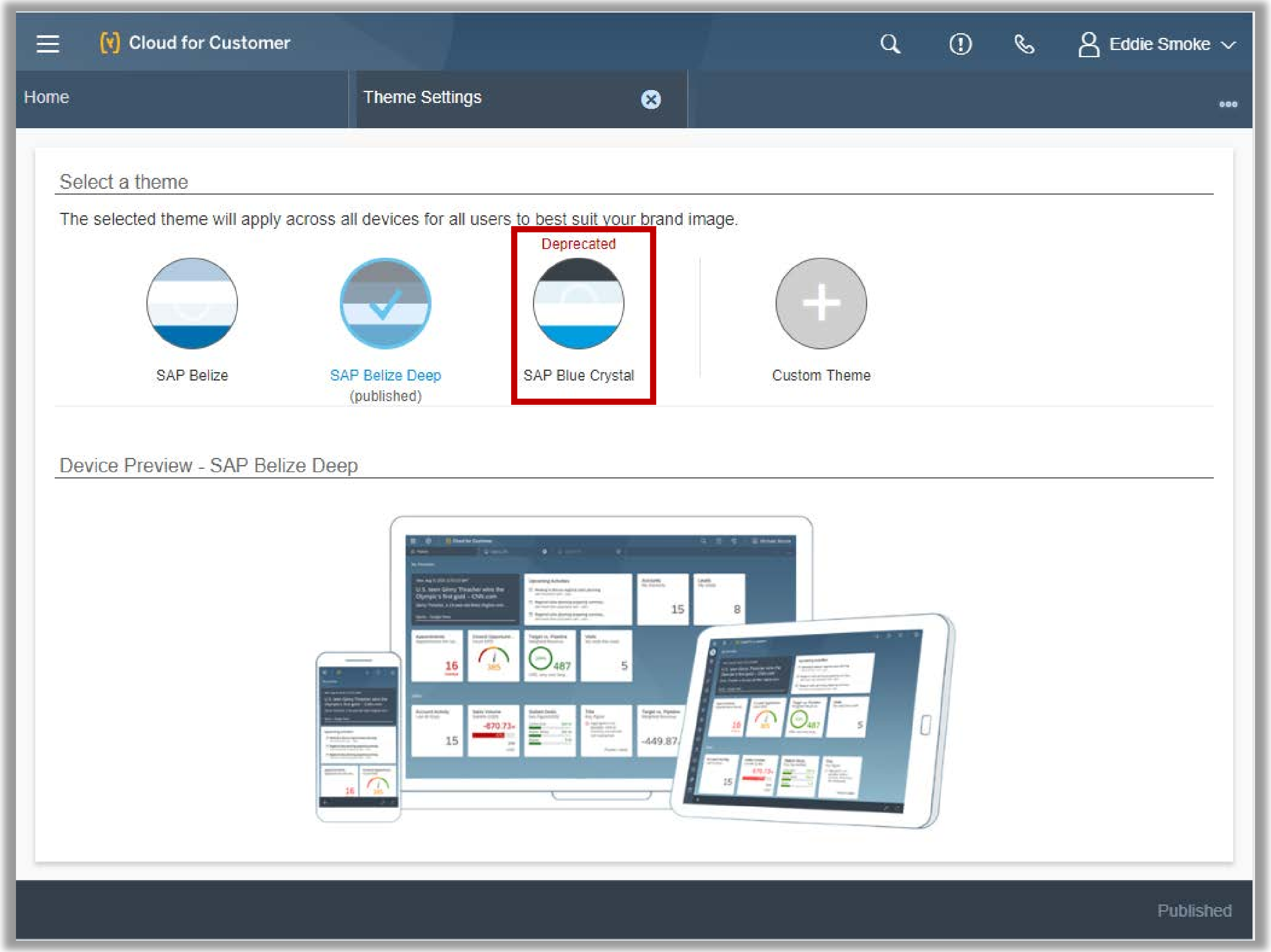
In conjunction with our release of the SAP Cloud for Customer OData API V2 series (c4codataapi), the currently available synchronous Web Services (a.k.a. SOAP, A2X) and the standard OData API V1 (a.k.a. c4codata) are to be deprecated

As a courtesy to customers, the APIs which are to be deprecated, will continue to work and be supported until **February 2020**.

For any new SAP Cloud for Customer project, we recommend the use of the newly released OData API V2 series.

We recommend to 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) in advance of the **February 2020** deadline.

General Information on Blue Crystal Theme – Planned for Deprecation



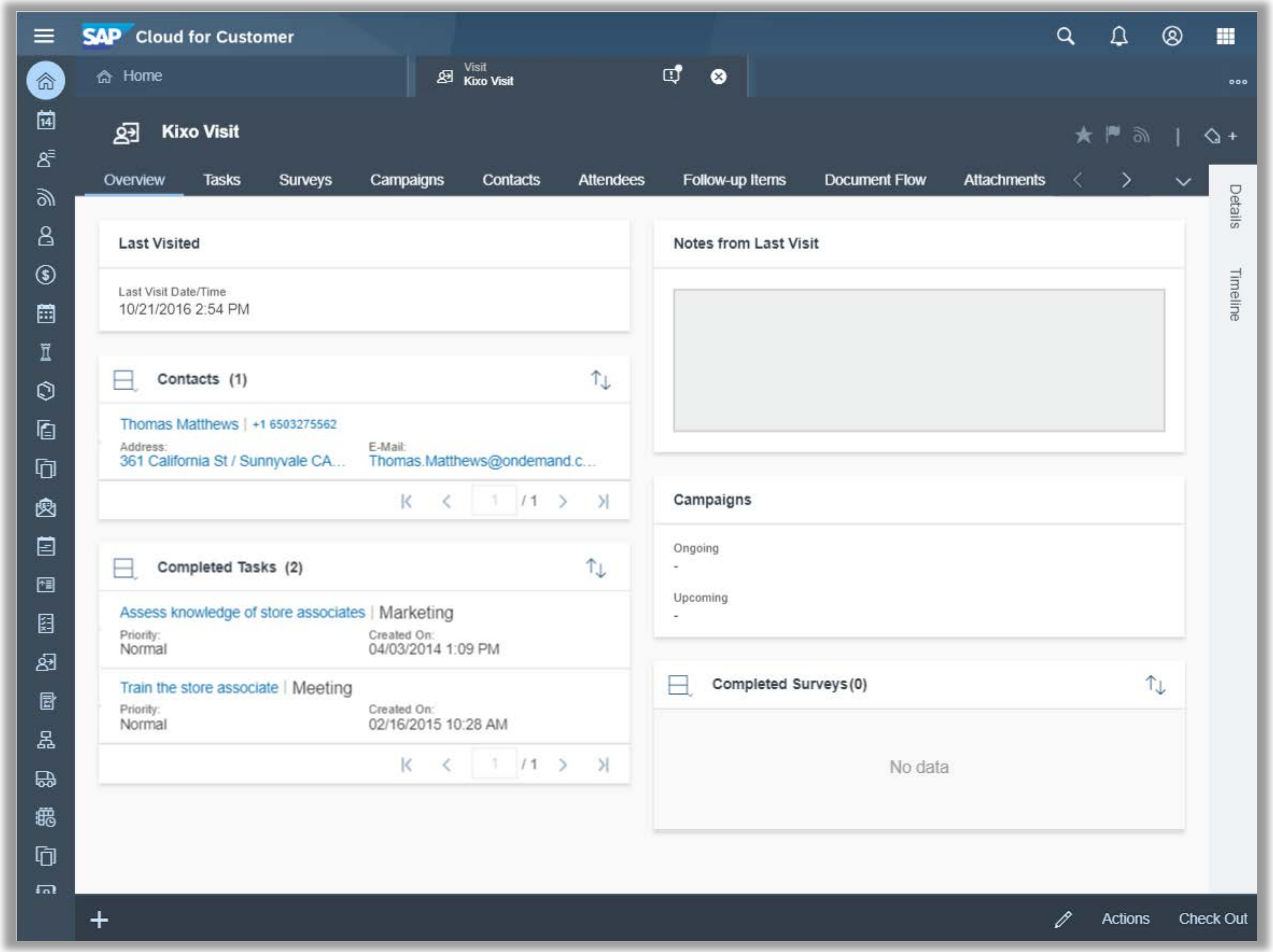
Blue Crystal Theme will soon be deprecated

- Blue Crystal Theme is targeted for deprecation in 1908
- Belize Deep Theme is expected to replace the current Blue Crystal theme

Set-up Details

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

Fiori Client Default Changes: Newsprint Layout



Newsprint layout

- Newsprint layout is enabled by default in Object Details pages.
- This layout optimizes the flow of sub-sections within the facets thereby reducing scrolling as sections flow upwards to reduce blank space

Key Business Benefits

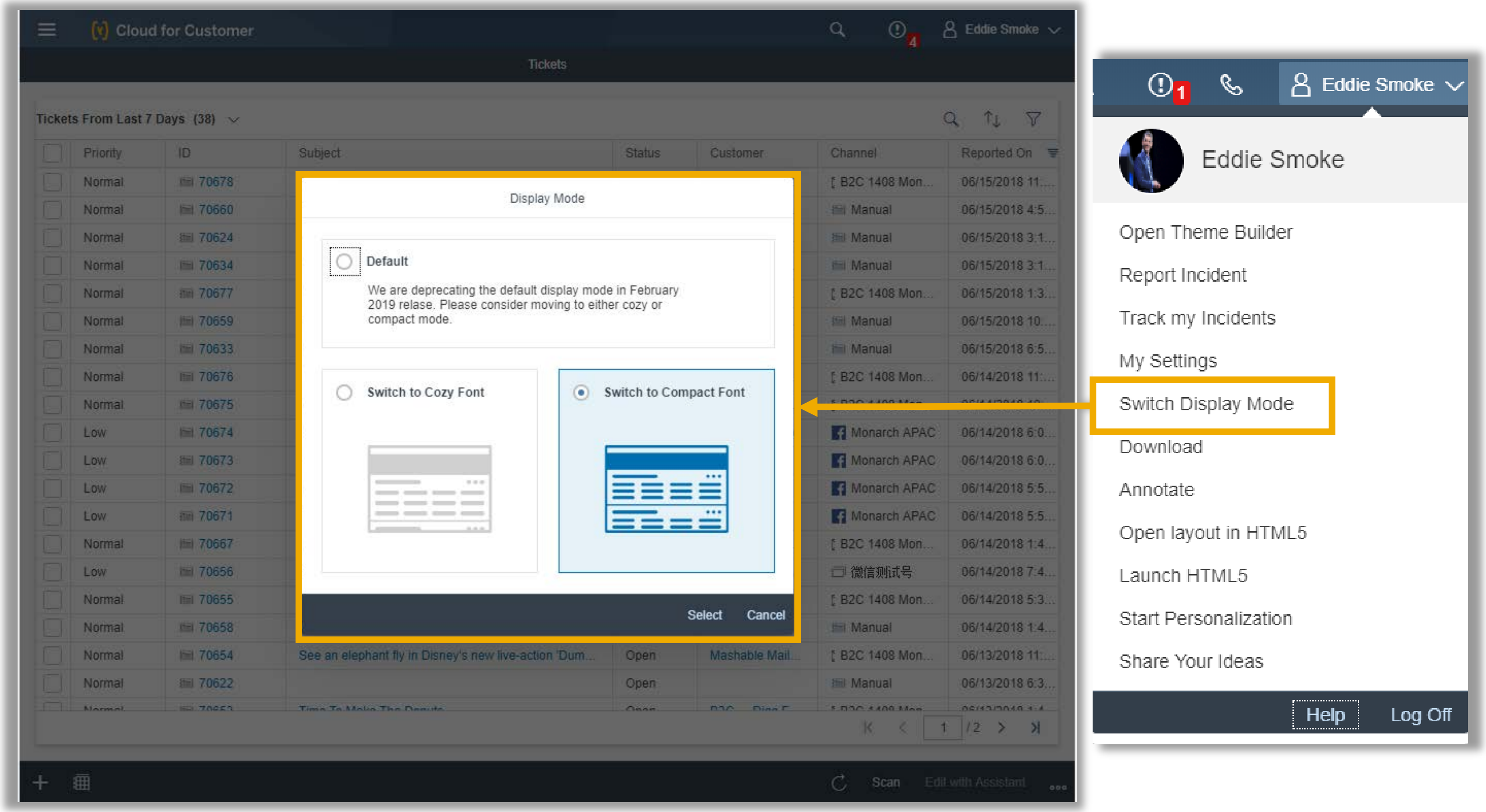
- Users can quickly scroll through the information on sections without having to do lot of vertical scrolling through the page.

Set-up Details

- Newsprint layout can be disabled via company setting.
- This setting will be removed with 1905 release upgrade.

☐ Disable Newsprint Layout

Fiori Client Default Changes: 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

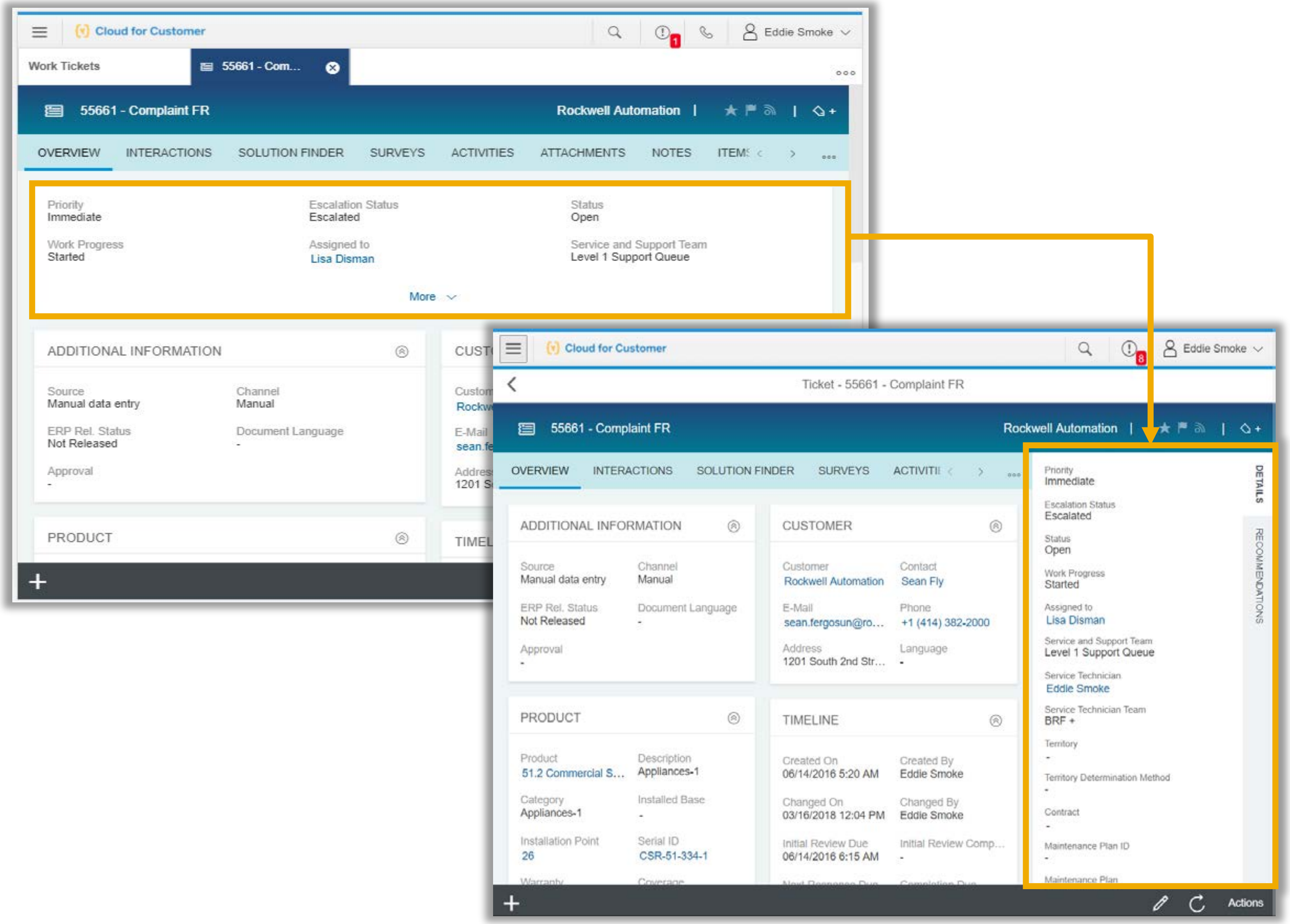
Key Business Benefits

- 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 Default Changes: Side Panel – Object Header information to Details facet (Now Optional!)



Object header details in Side Panel for Object detail – Now Optional!

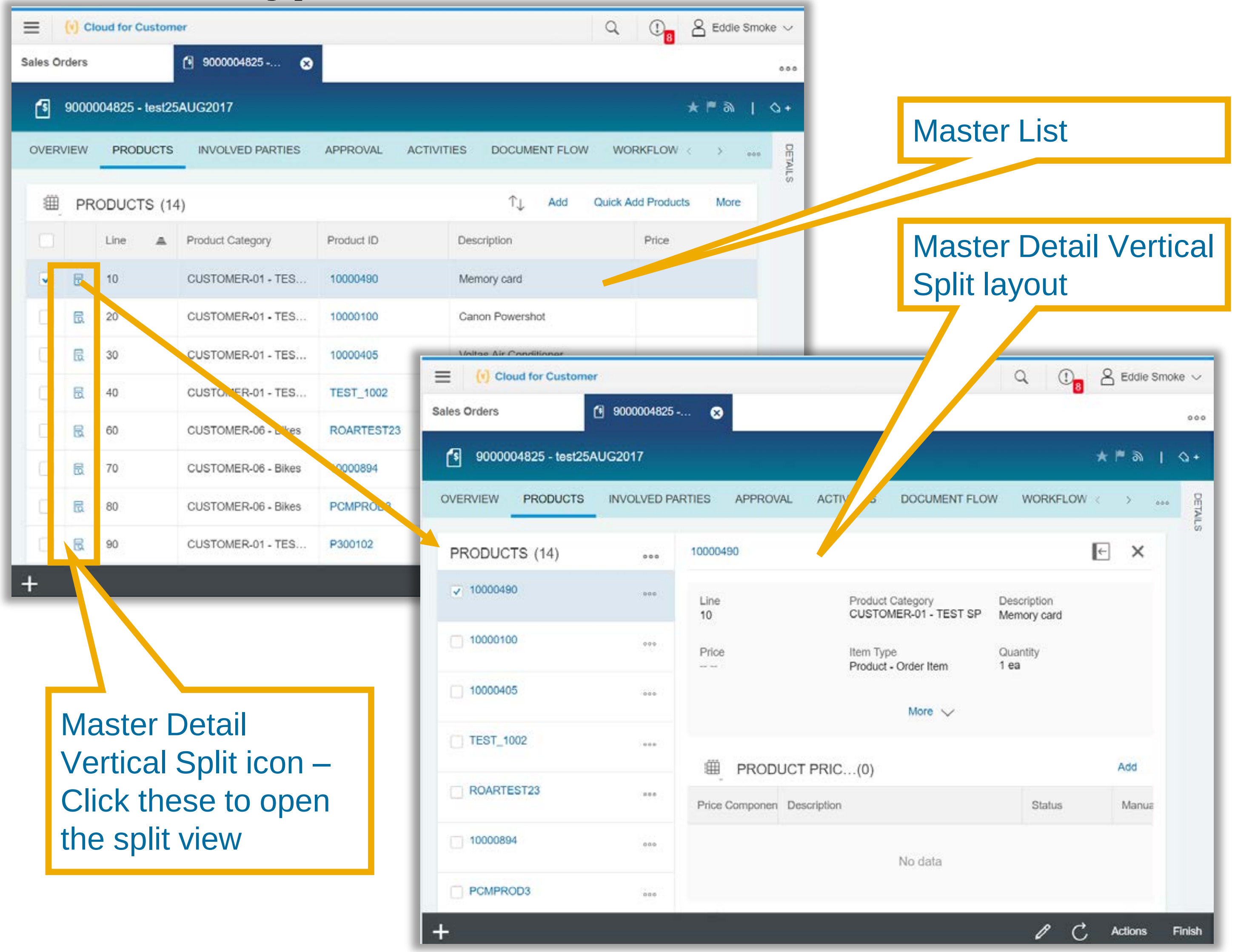
- Object header information can now be moved into the side panel in the "Details" facet.
- This move was to be mandatory, however, base on customer feedback, we will over both options to customers going forward.

Key Business Benefits

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

Plans changed for this feature – both options will remain available for customers.

Fiori Client Default Changes: Master Detail Vertical Split layout (Desktop and Tablet only)



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

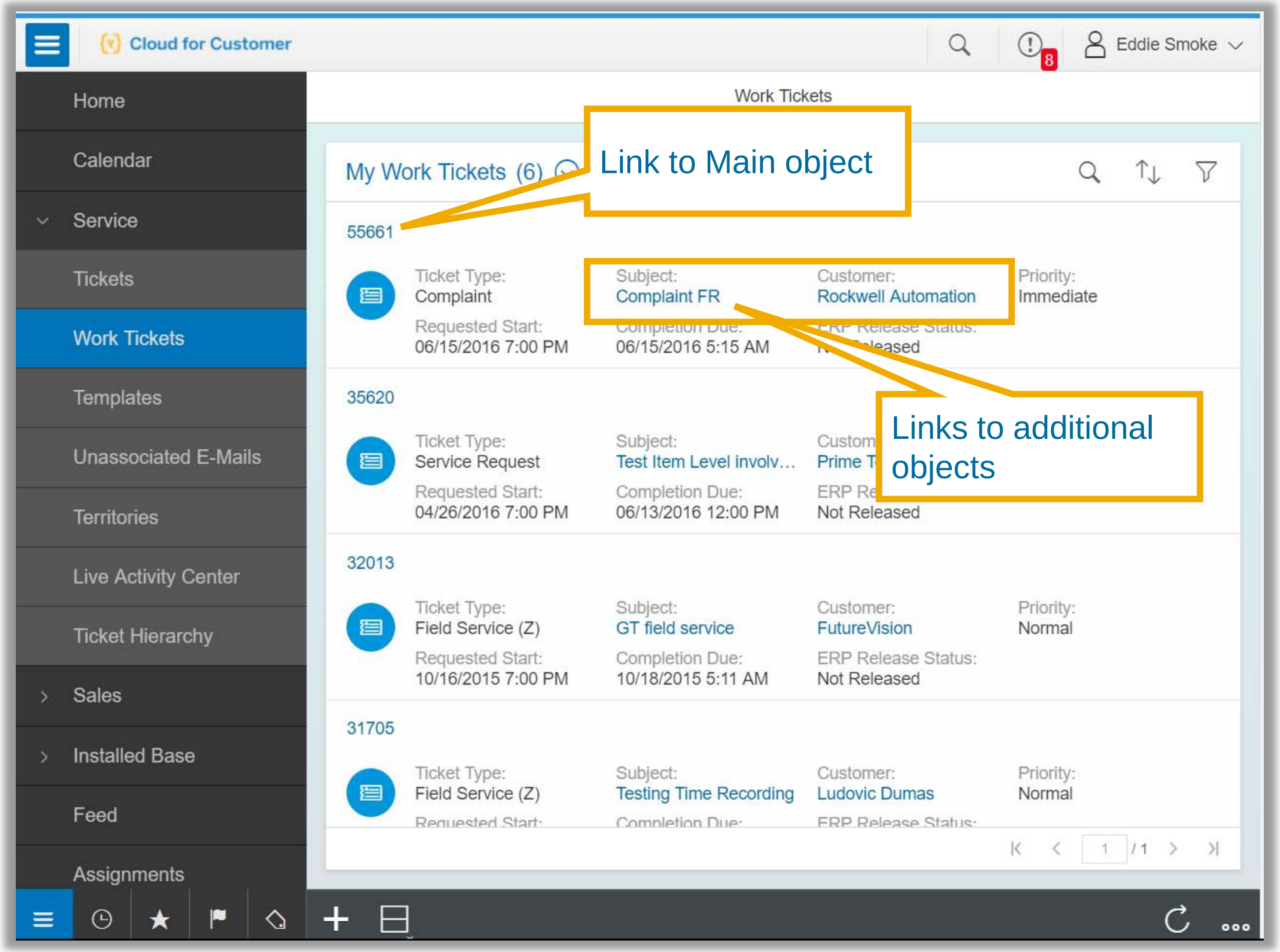
- The Products table in Sales Order now displays detailed information in a Master-Detail Vertical split pattern.
- This layout is now by default turned ON.

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.

Fiori Client Default Changes: Links on Chunk View



Links on Chunk view now available

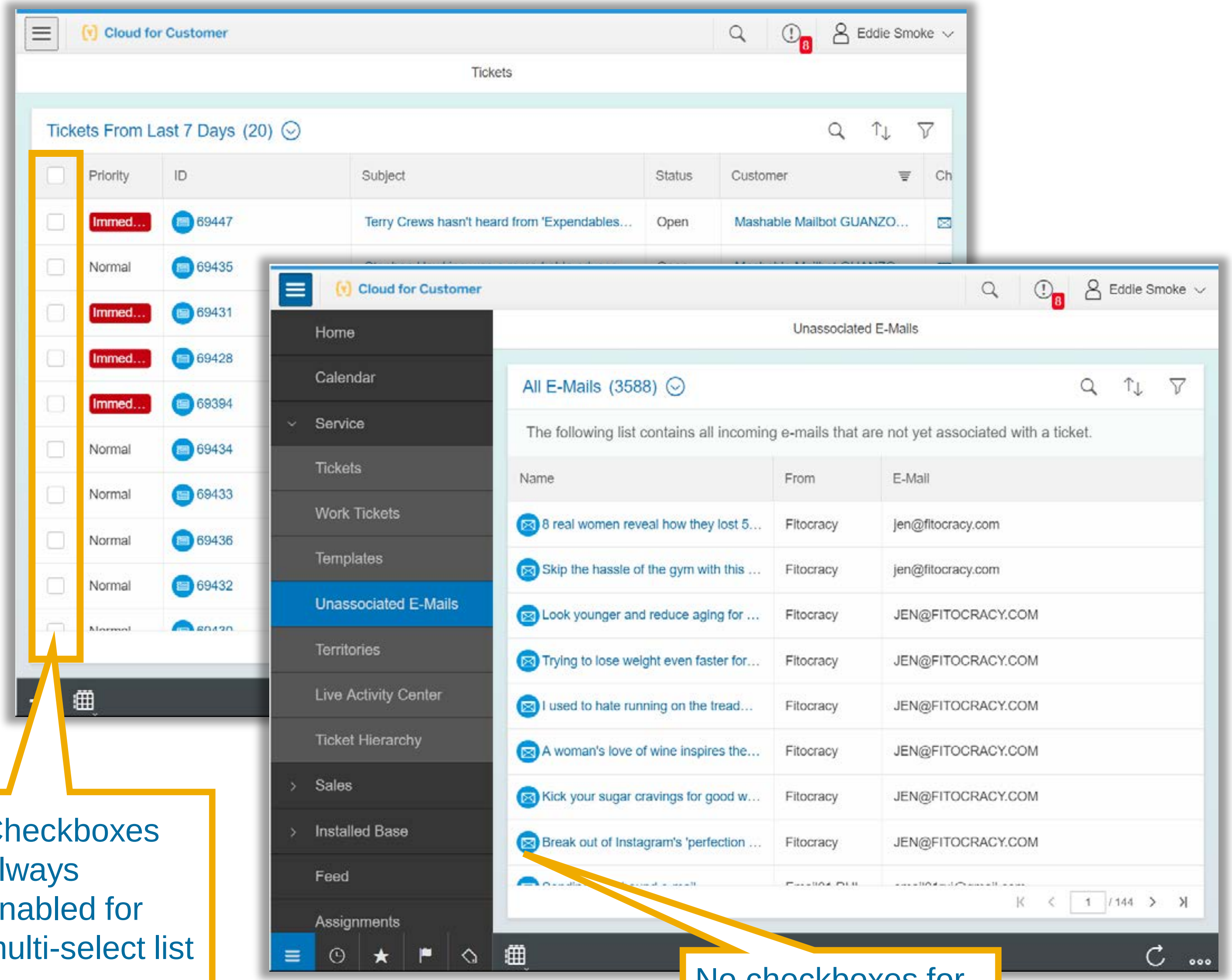
- Links on chunk view are now enabled.
- Clicking on the links will navigate to the relevant destination.
- When links are enabled on chunk view, navigation to the main object can be done by clicking the main object link.

Key Business Benefits

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

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

Fiori Client Default Changes: Multi Selection enhancement



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.

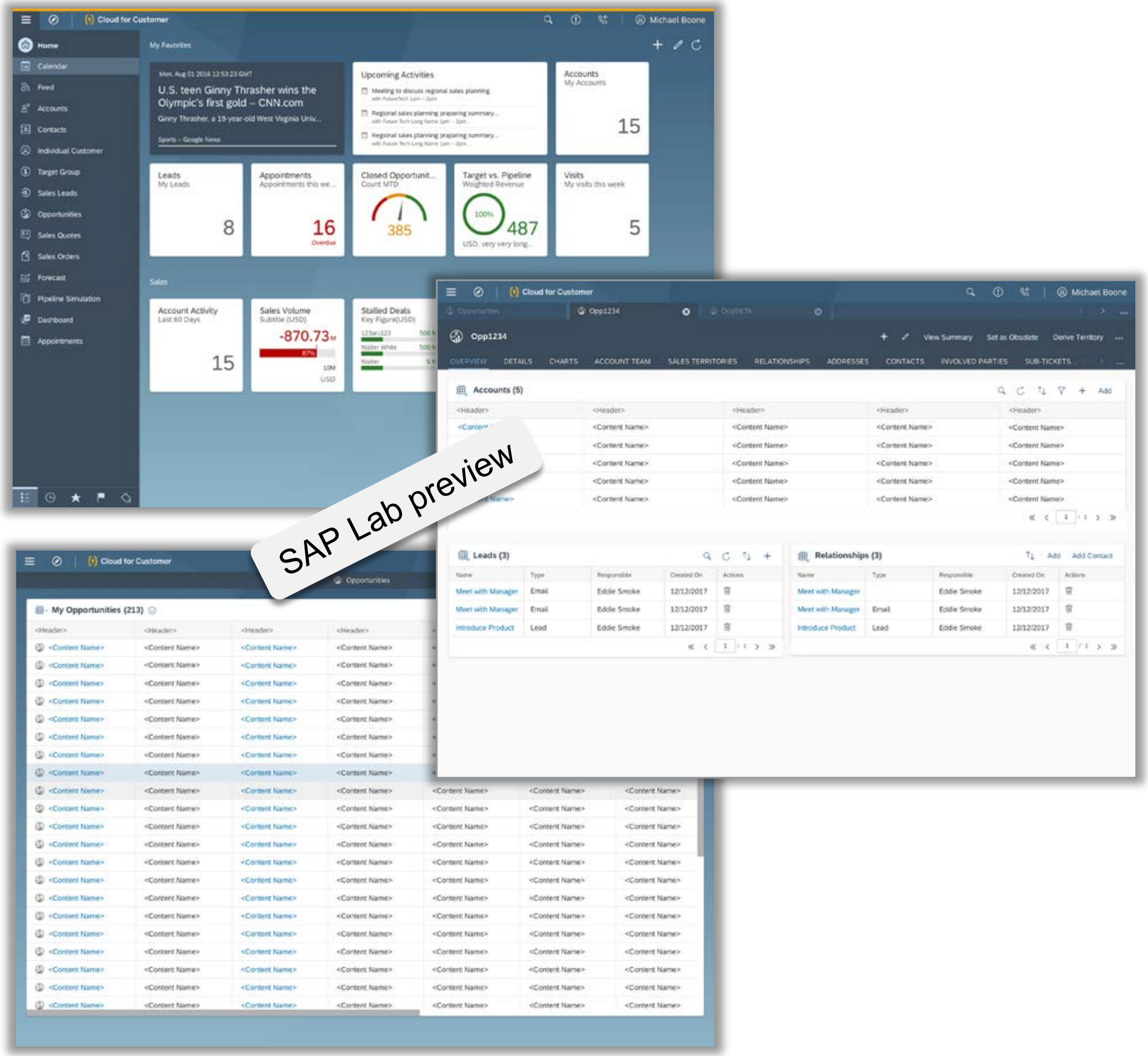
Key Business Benefits

- 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.

Planned innovations

Fiori Client Action Menu Enhancements – UX Change Advance Notice



As a result of customer feedback, a decision has been made to consolidate the Action options across the application to a single place. This will simplify usability.

This feature is now planned for 1905 (previously 1902), and will have an impact on your users. We are therefore providing some advance notice for planning purposes. More details will come.

Moving Actions from footer to top of screen

- Moving all actions to the top of page.
- Flattening out menus where needed especially for mobile devices in order to reduce number of clicks.

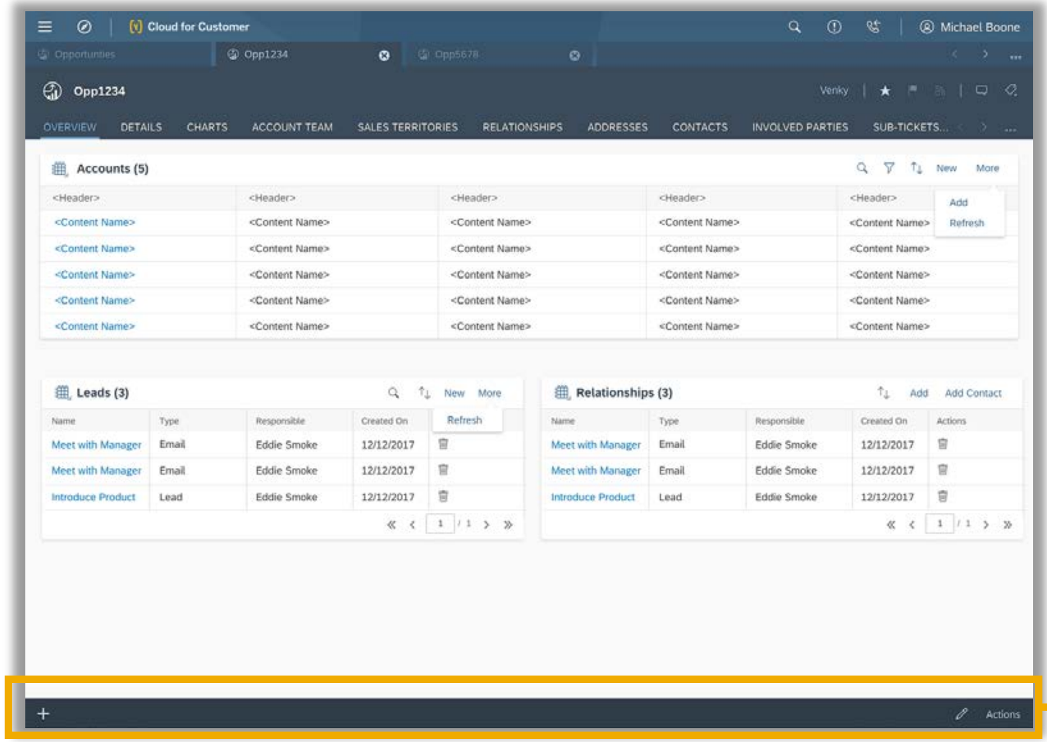
Key Business Benefit

- Provide a consistent experience of how actions are placed across various application screens and across different device form factors.
- Reducing number of clicks by flattening out action menu items

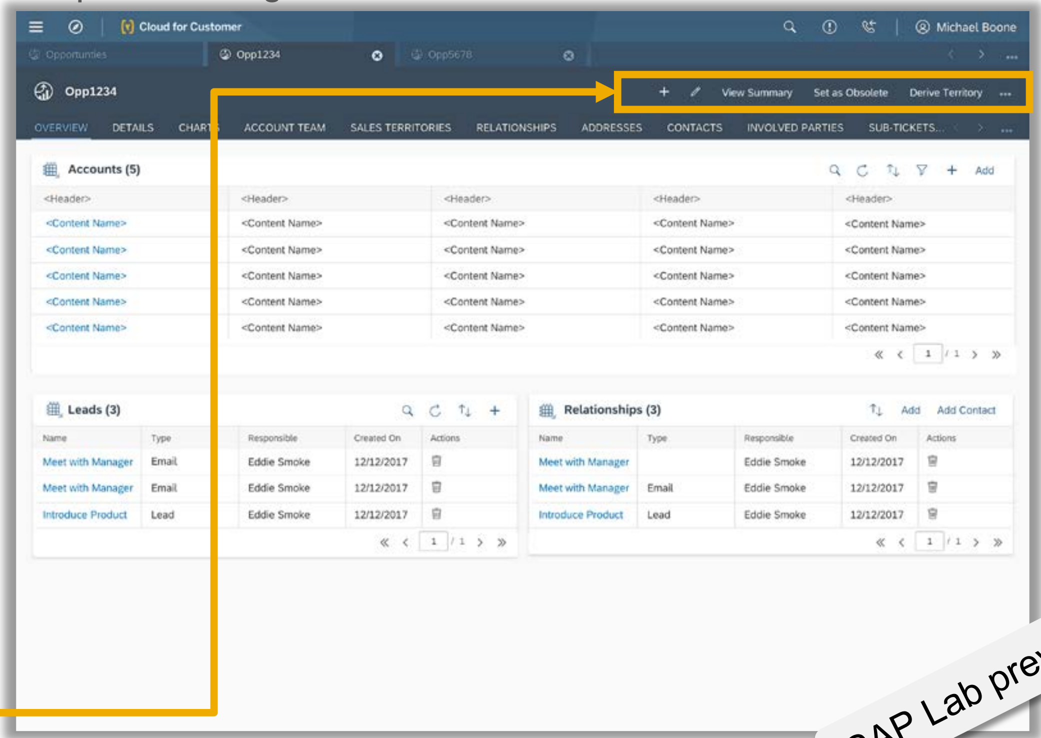
Fiori Client Action Menu Enhancements – Further Details

Planned innovations

Current



Proposed Design



SAP Lab preview

Action Menu

- Footer removed
- All actions moved to top right

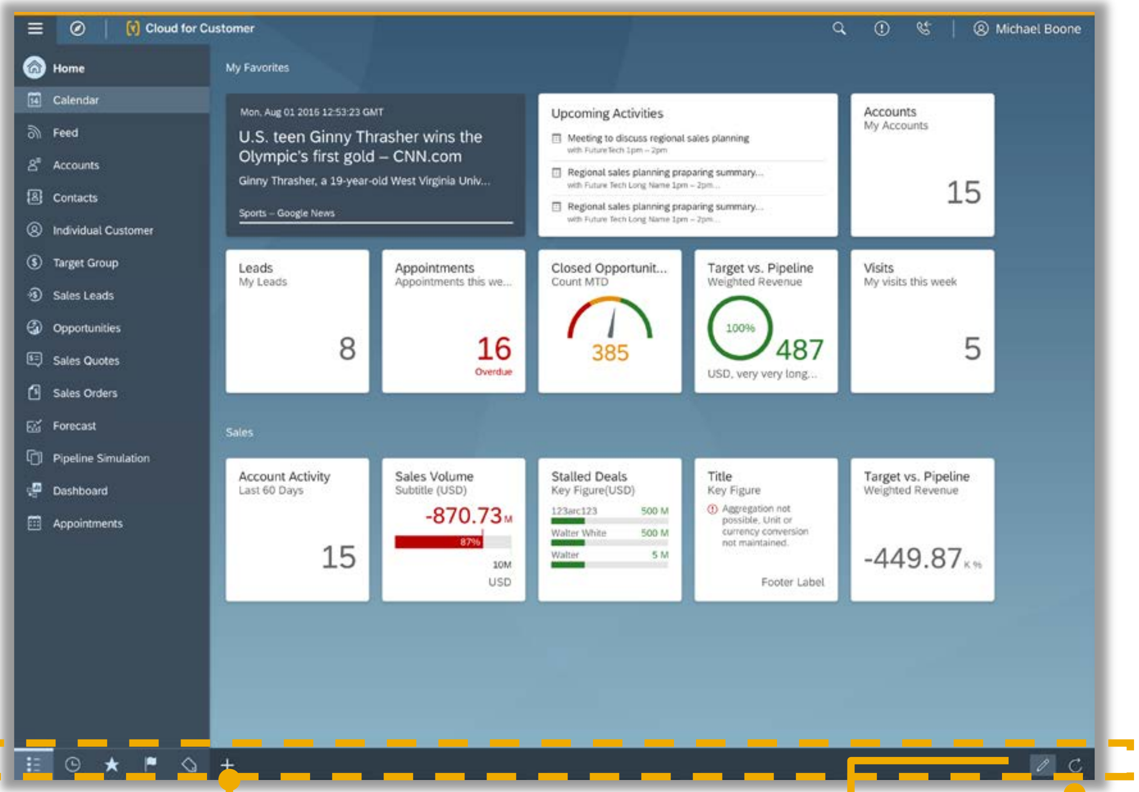
This is the current state of planning and may be changed by SAP at any time.

Fiori Client Action Menu Enhancements – Homepage Impact

Planned innovations

The footer should be removed from the Home Page. All actions should be moved to the top right.

Current



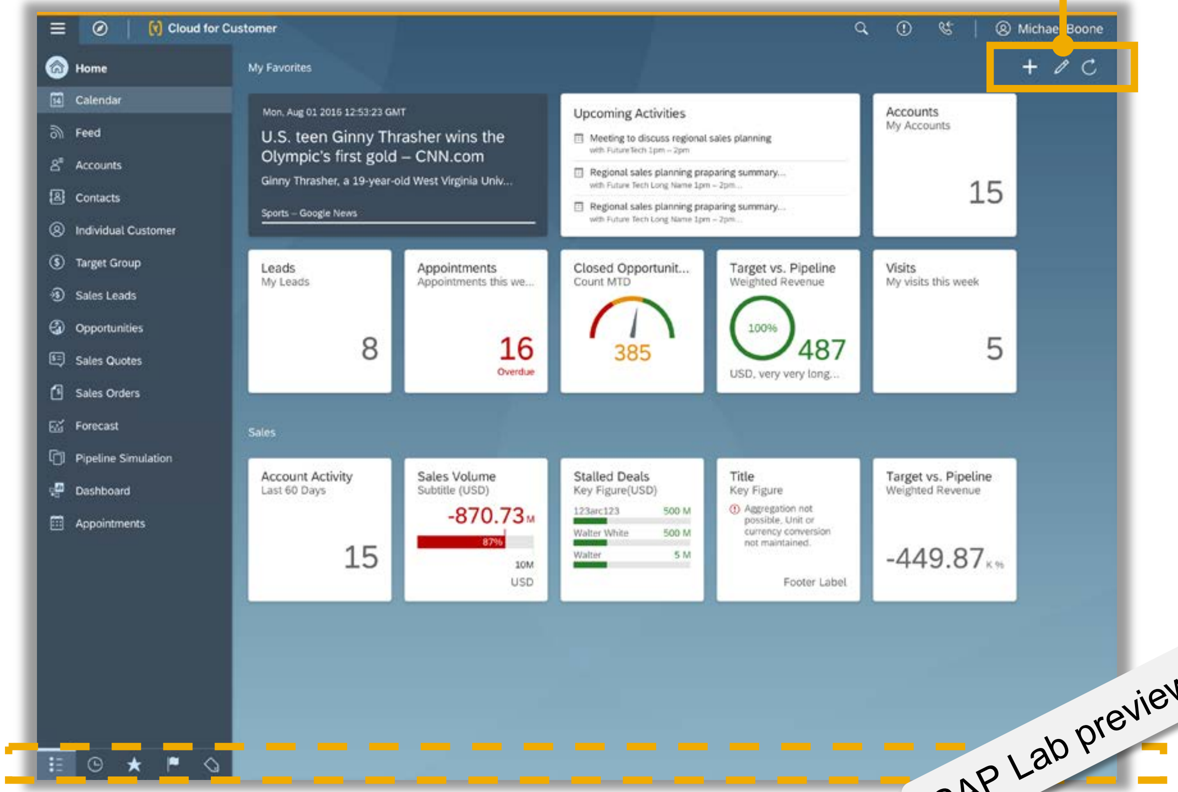
Global Create as + Button

All action icons, including refresh, edit and create, are part of the footer.

Refresh

Proposed Design

Icons are now in a fixed location on the top right.



SAP Lab preview

Footer is removed

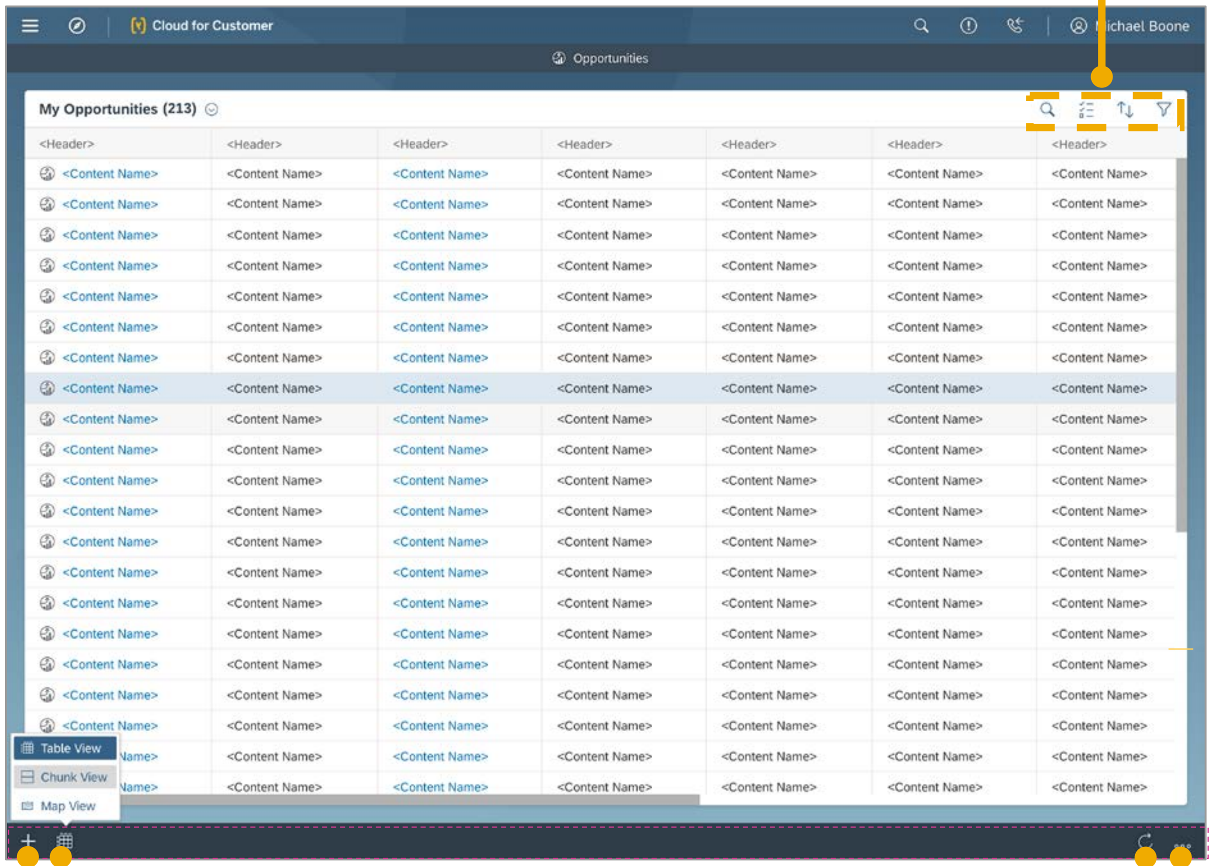
Fiori Client Action Menu Enhancements – Object List Impact

Planned innovations

The footer should be removed from the OWL. All actions should be moved to the top right in the tool bar.

Current

List Tools



View Switcher

New, as + Button

Overflow

Refresh

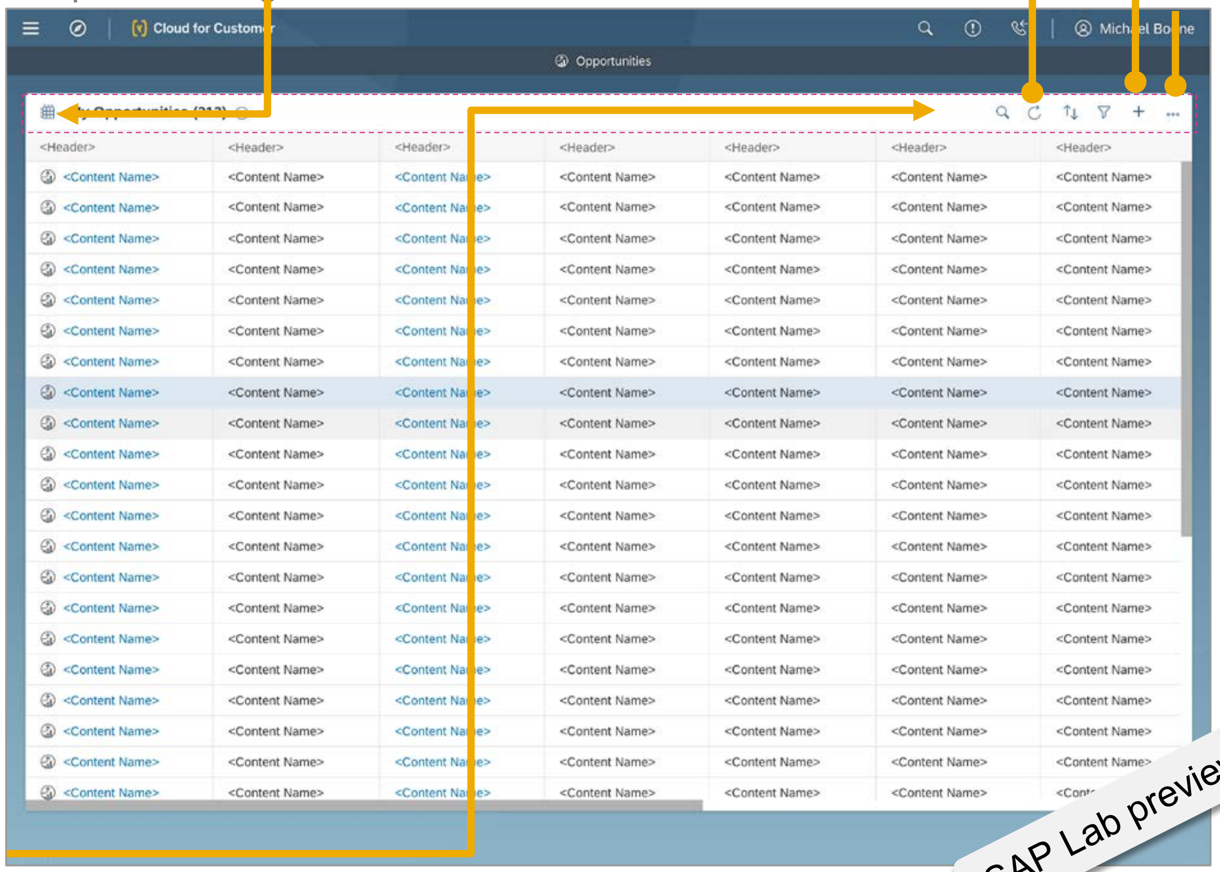
Proposed Design

Refresh, as a List Tool

New

Overflow

View Switcher

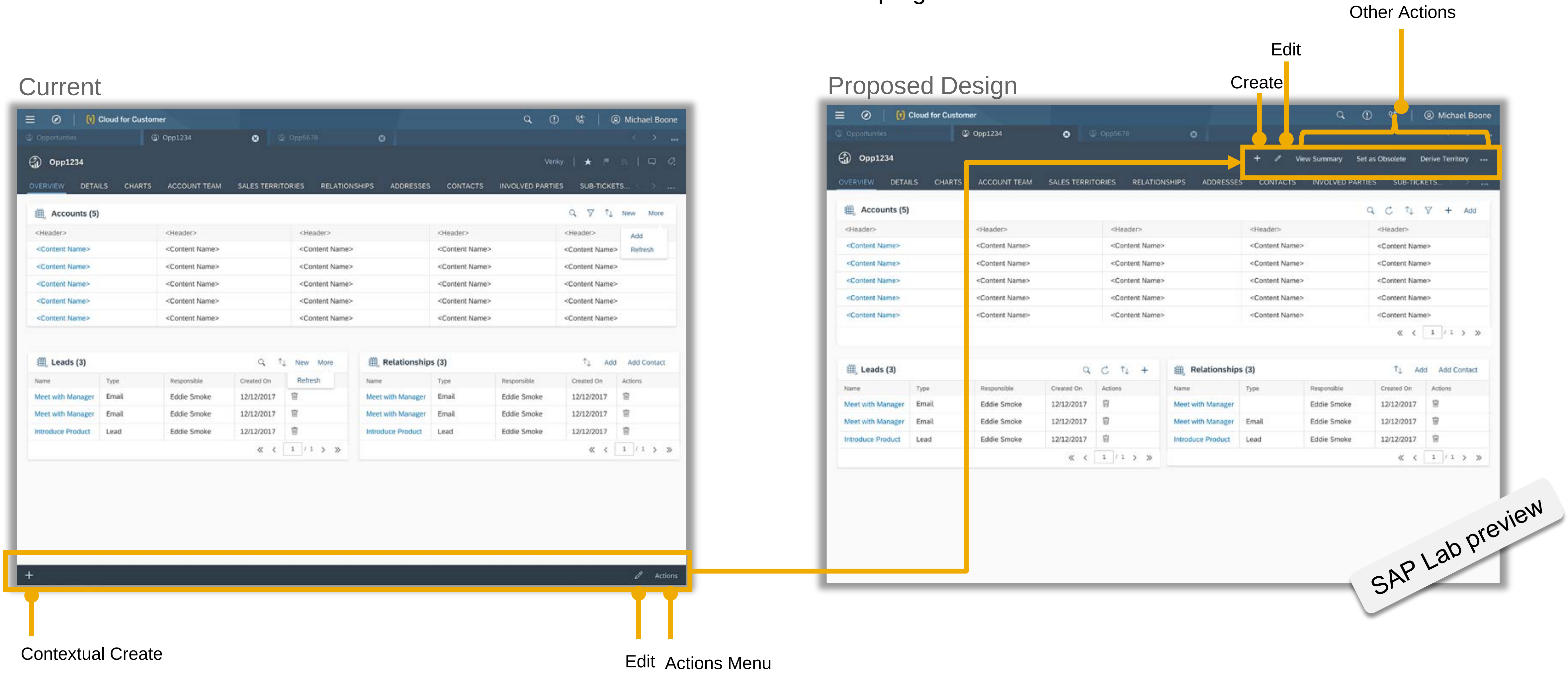


SAP Lab preview

Fiori Client Action Menu Enhancements - Object Details

Planned innovations

The footer should be removed from the TI. TI actions should be moved to the top right of the title area.



SAP Cloud for Customer in the SAP Sales Cloud

What‘s new in 18.11?

Sales Topic Overview

- Business Partner (Account, Contact, Customer)
- Lead & Opportunity Management
- Machine Learning for Sales
- Sales Planning and Forecasting
- Product Lists
- Sales Contracts
- Sales Quotes
- Sales Orders
- Calendar
- Activities
- Visits
- Routes
- Surveys
- Perfect Store GA!

What's New in Business Partner

What’s New in 1811 for Business Partner

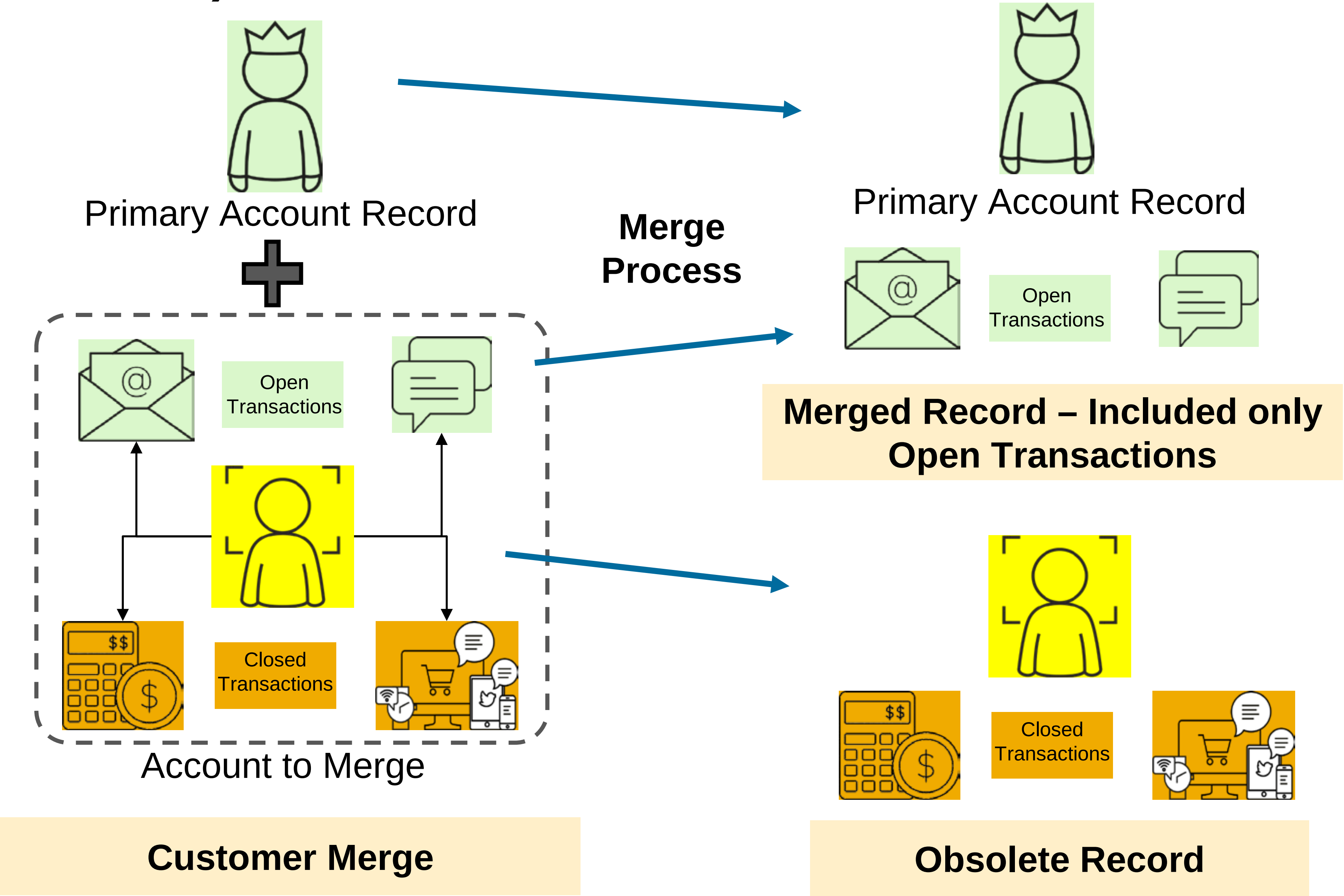
Key Innovations

- Reassignment of Closed Transaction History during Account Merge Process

Additional Enhancements

- New Datasource to Map Obsolete Duplicate and Primary Account Records
- BAdI to Control Address Copy during Merge Process
- New Business Partner Utility to Distinguish between Change And Merge Context
- New Sales Area Fields - Price Group and Price List
- New “Related To” Query for Easy Selection of Involved Parties and Account Team
- “Bill-To” and “Ship-To” Indicators in Account Data Source
- Further Enhancements

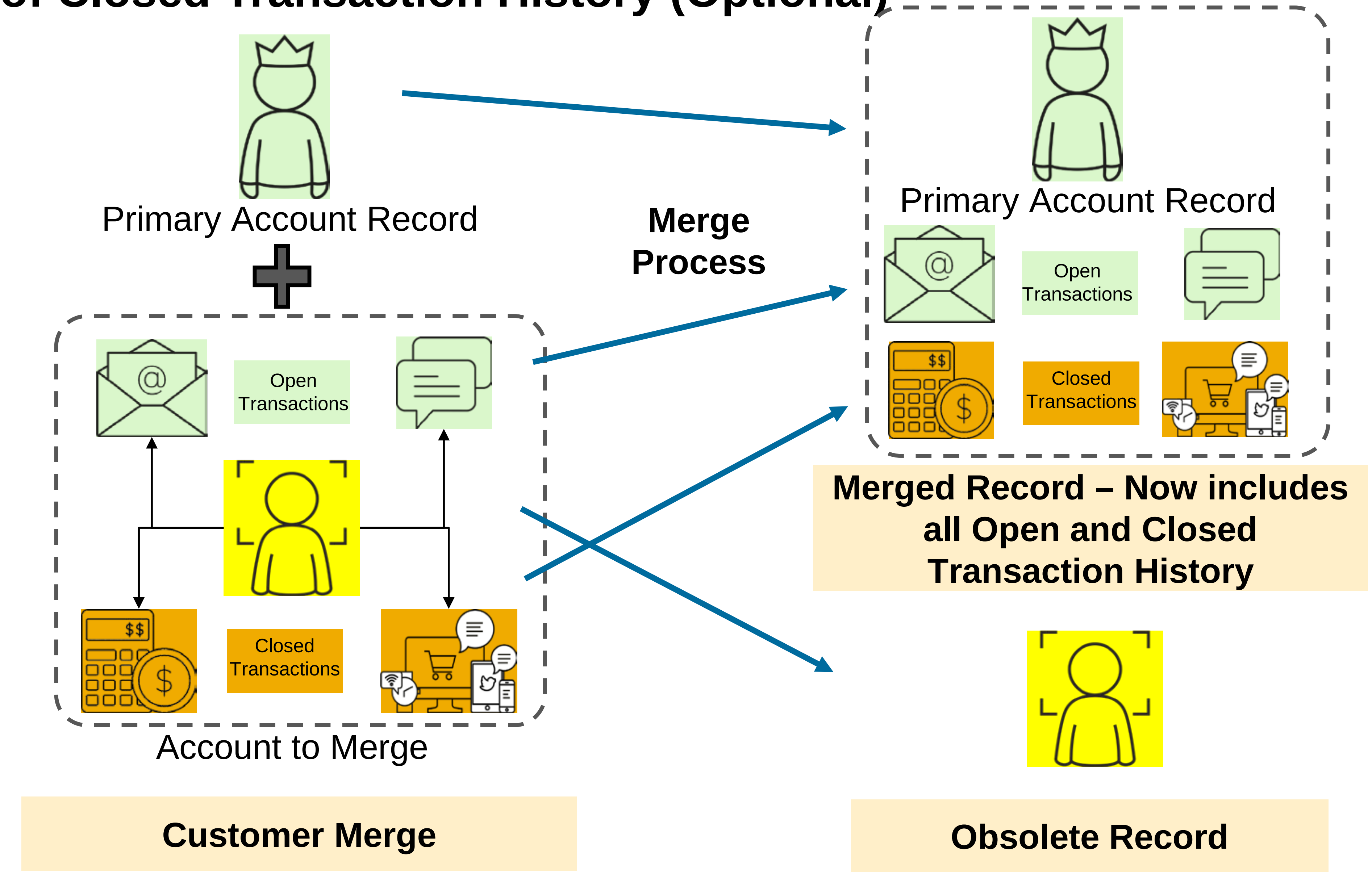
Account & Contact: Customer Merge - Transaction Reassignment (Situation as of 1808)



Merge process was bringing only open transaction activity to the primary account record

- The closed transaction history remained associated only with the obsolete record
- For example ,if two customer records are merged into one master, closed sales quotes/ activities would remain linked only to the obsolete duplicate record resulting in incomplete customer view
- This was resulting an incomplete view of the customer activity in the context of the primary account record
- This feature applies to Account, Individual Customer, and Contact

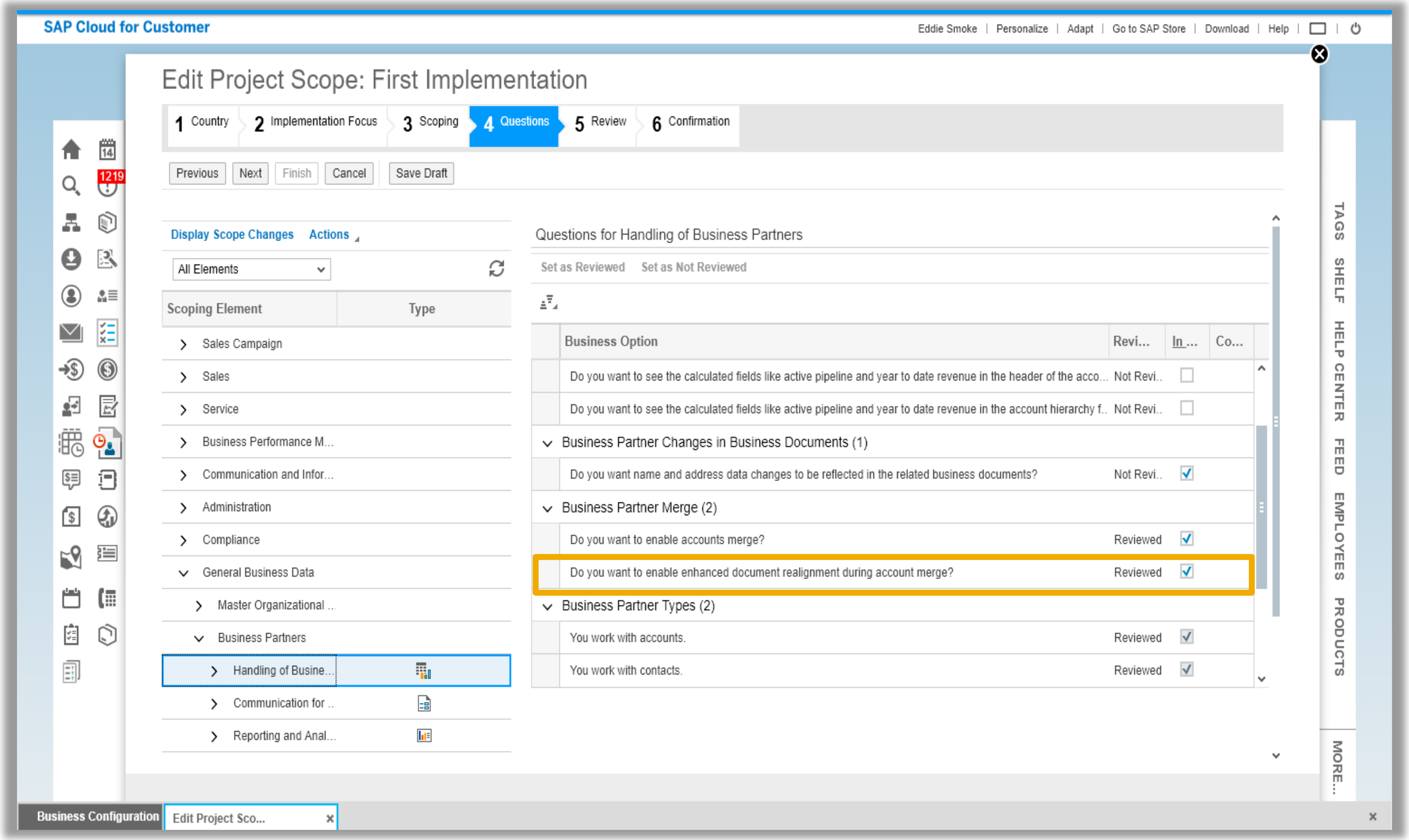
Account & Contact: Customer Merge - Transaction Reassignment Inclusive of Closed Transaction History (Optional)



The merge process is enhanced to include closed transaction history, in addition to the open transaction history that was previously available.

- The enables a more complete view of the account for the primary account record

Account & Contact: Customer Merge - Transaction Reassignment Inclusive of Closed Transaction History

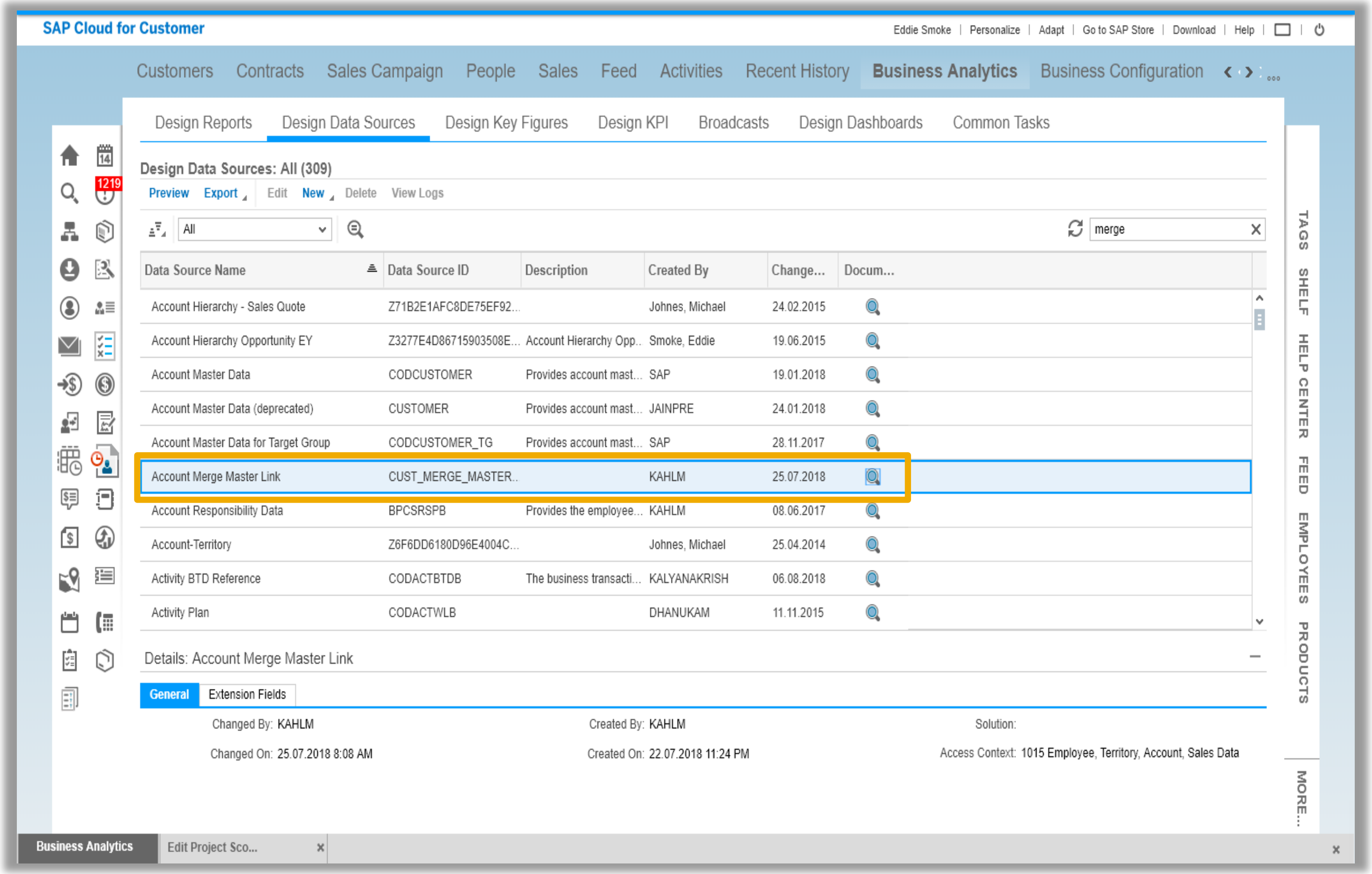


As an administrator, you can specify if the account merge process should include or exclude the closed transaction history

Set-up Details

- A new BC scoping has been introduced under General Business Data → Business Partner → Handling of business Partner → **"Do you want to enable enhanced document realignment during account merge".**

Account & Contact: New Datasource to Map Duplicate and Primary Account Records



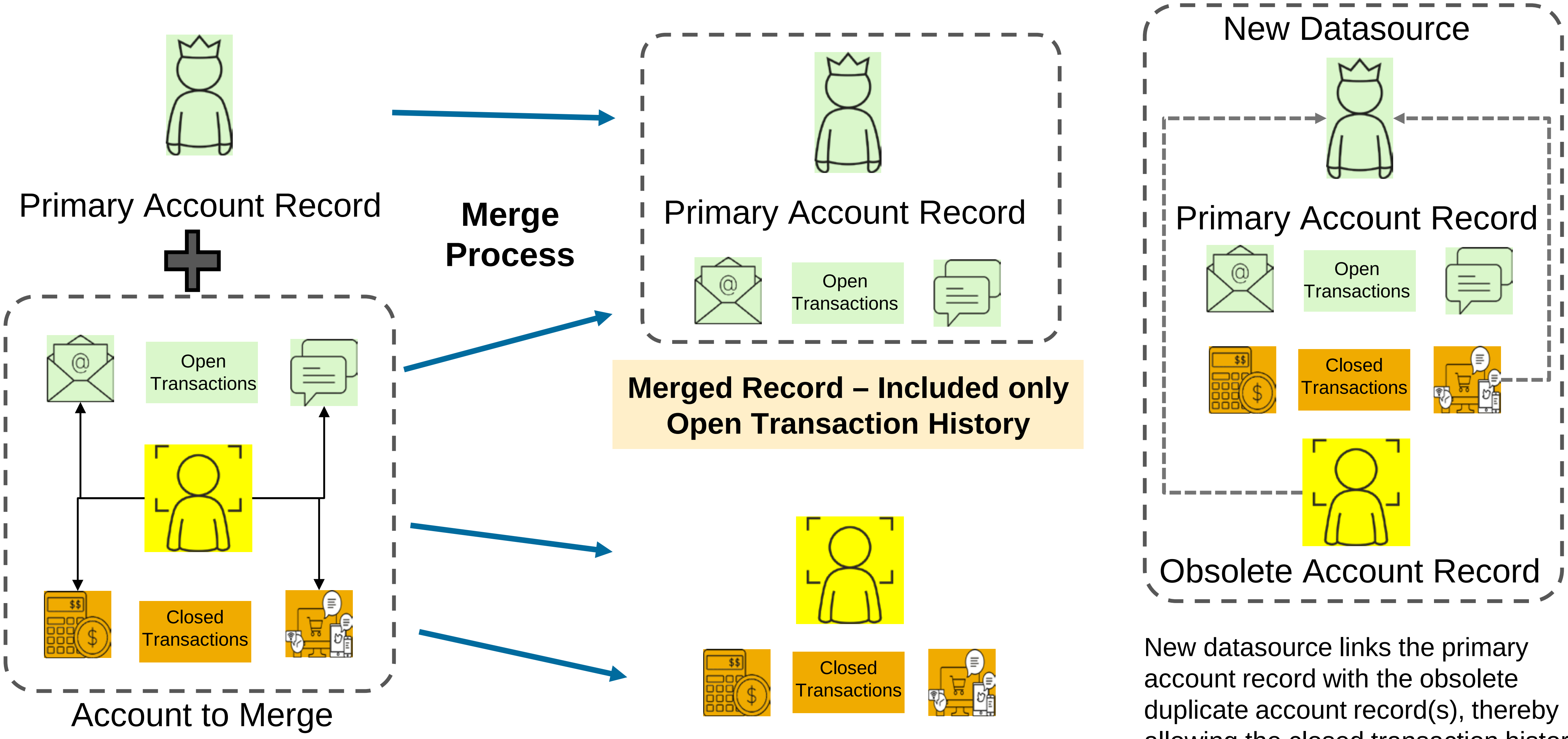
A new data source is available to support mapping of the obsolete duplicate & primary account records

- A new data source will enable a mapping between primary and obsolete duplicate account records
- This can be used in cases where it is not desired to reassign closed transaction history from the duplicate account to the primary account, but rather leverage reporting to show the full picture of the account data.
- This feature may be desired for cases where merging of the closed transaction data may not be desirable from an integration perspective.

Set-up Details

- Data Source “Account Merge Master Link” can be used to create reports based on master / duplicate record mapping .

Account & Contact: New Datasource to Map Duplicate and Primary Account Records – cont'd

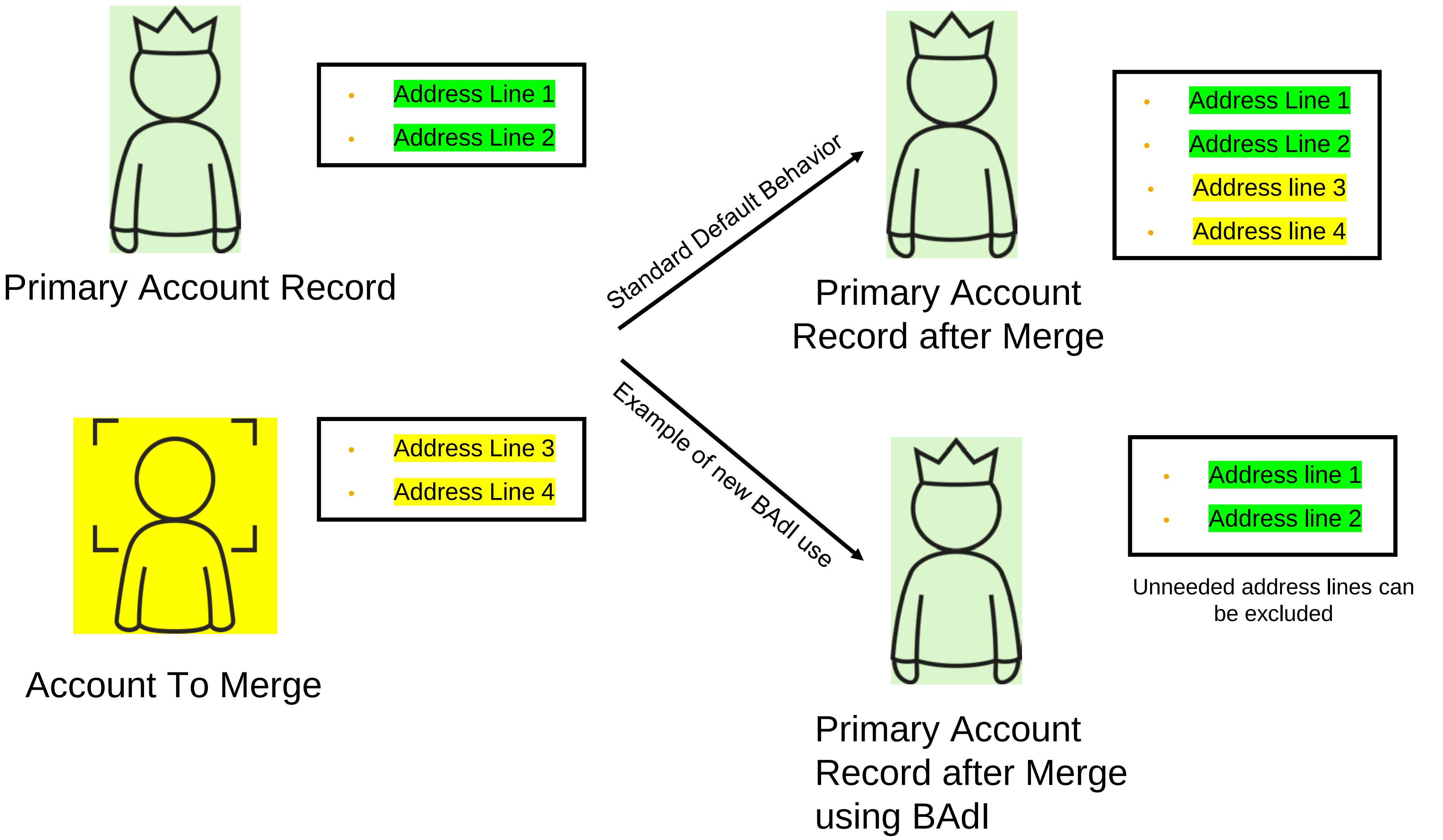


Customer Merge

Obsolete Record

New datasource links the primary account record with the obsolete duplicate account record(s), thereby allowing the closed transaction history to be reported on with the rest of the activity on the primary account.

Account & Contact: BAdI to Control Address Copy during Merge Process



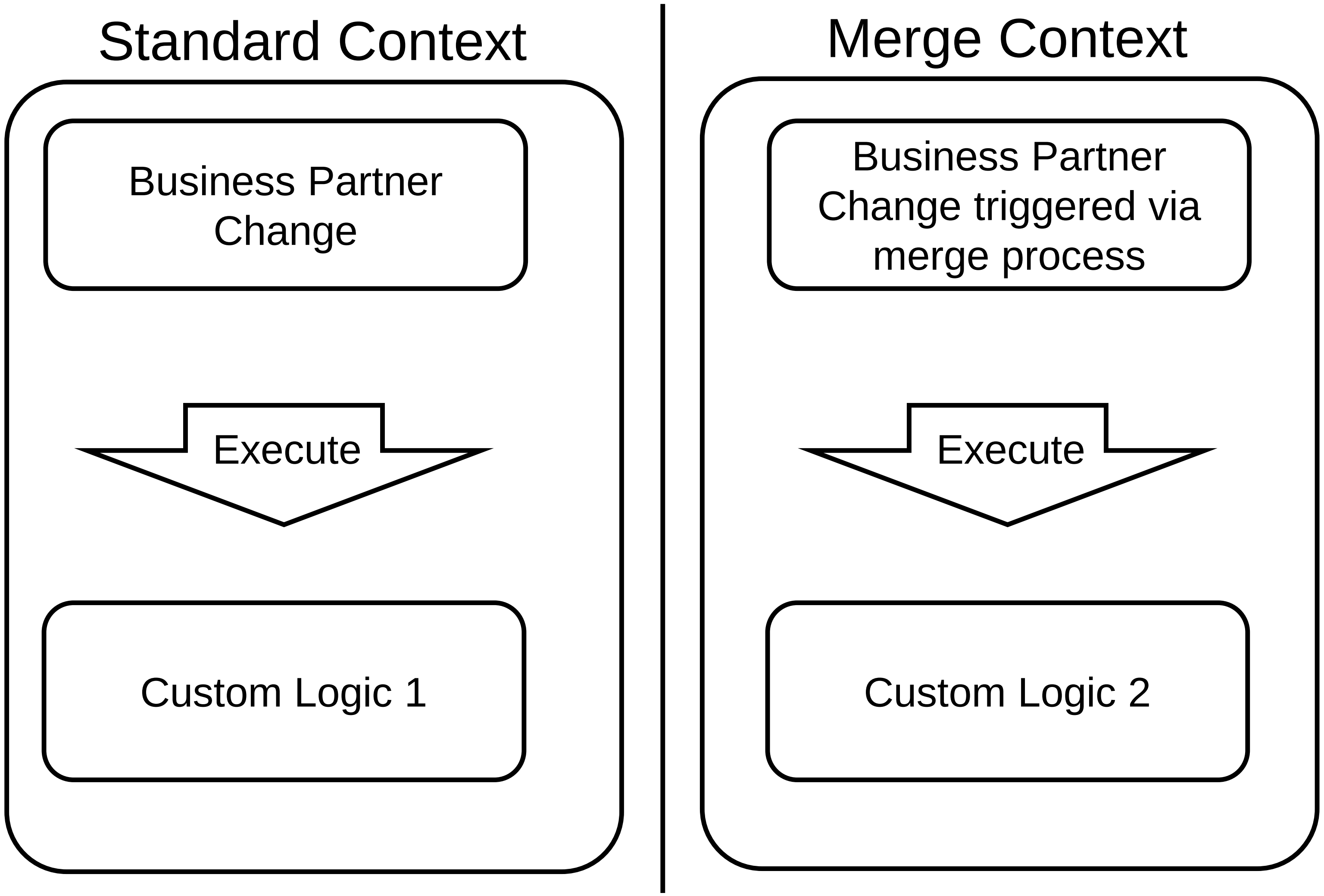
A new BAdI (Business Add-In) is available to allow for control over what address lines are copied or excluded as part of the account merge process.

- The BAdI essentially allows you to exclude the additional address lines of the account that is to be merged to the primary record.

Set-up Details

- A new PDI(SDK) enabled BAdI enables you to switch off address copy (from duplicate to master record) during the merge process.

Account & Contact: New Business Partner Utility to Distinguish between Change And Merge Context



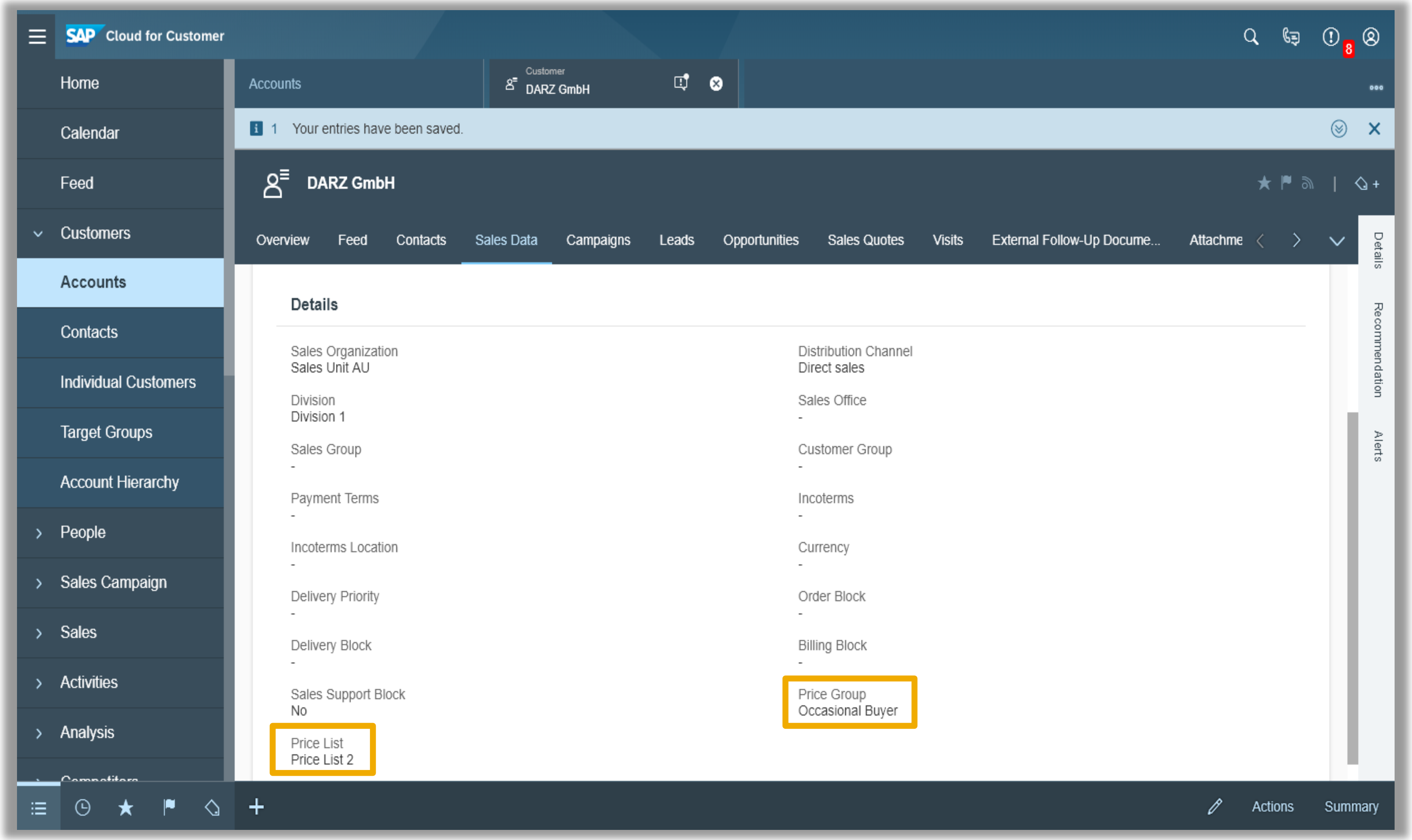
It is now possible to have custom logic react differently if a change to an account or other business is triggered by a business partner merge execution or standard change process.

- For example ,you can now decide to have a custom logic executed only if the changes to the business partner is done during the business partner merge process. You can choose to bypass this custom logic for normal business partner changes

Business Partner Utilities

- This SAP reuse library contains a service that is based on the Business Partner business object provided by SAP. To use this SAP reuse library, you need to import the AP.FO.BusinessPartner.Global namespace BusinessPartnerUtilities. IsBusinessPartnerMerge
- See the detailed help documentation for more information

Account & Contact: New Sales Area Fields - Price Group and Price List



The fields ’Price Group’ and ‘Price List’ are now available as part of the standard Sales Area set

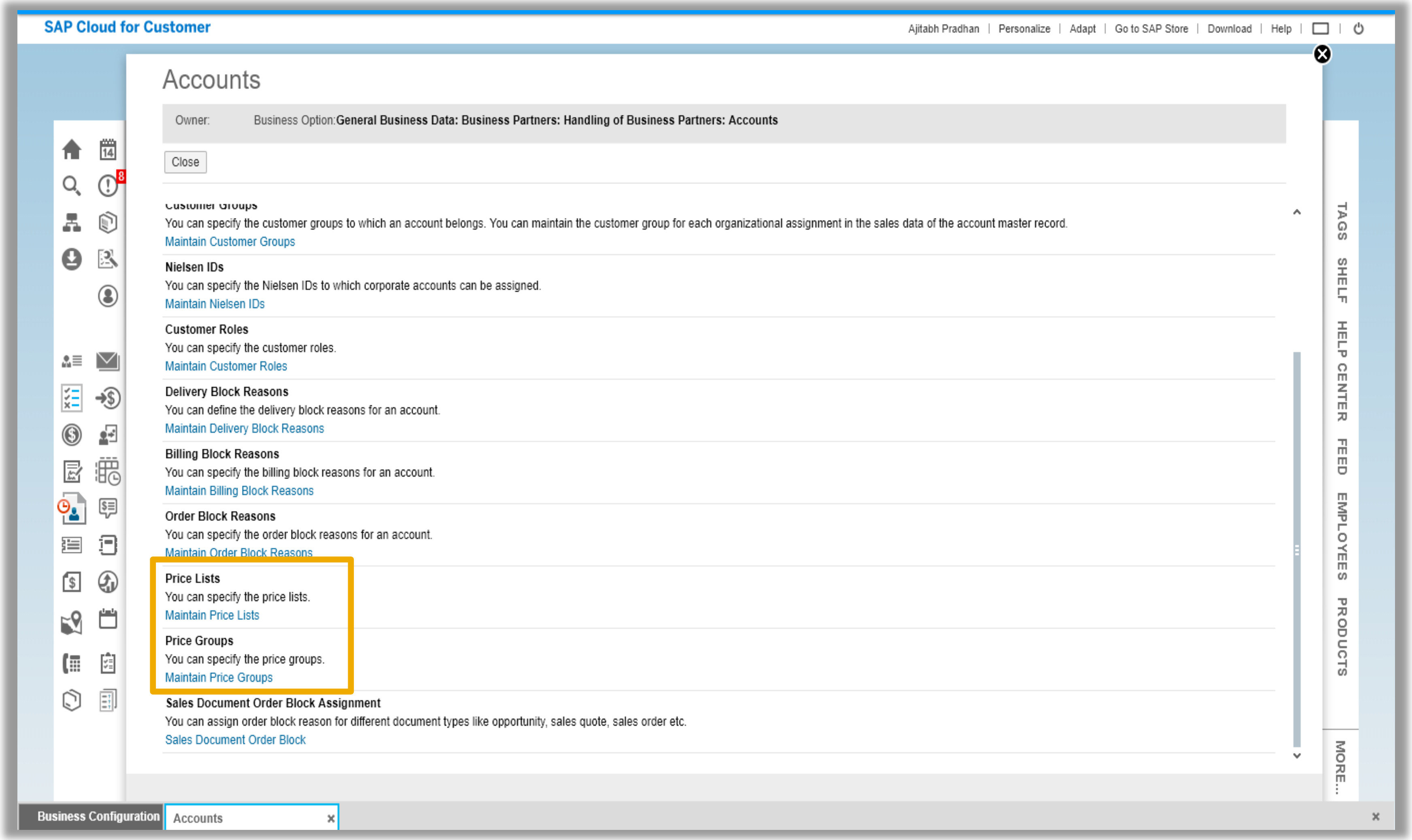
Key Business Benefits

- These fields are now available to support integration use cases with SAP ECC

Set-up Details

- These field are delivered as hidden and must be personalized as visible.

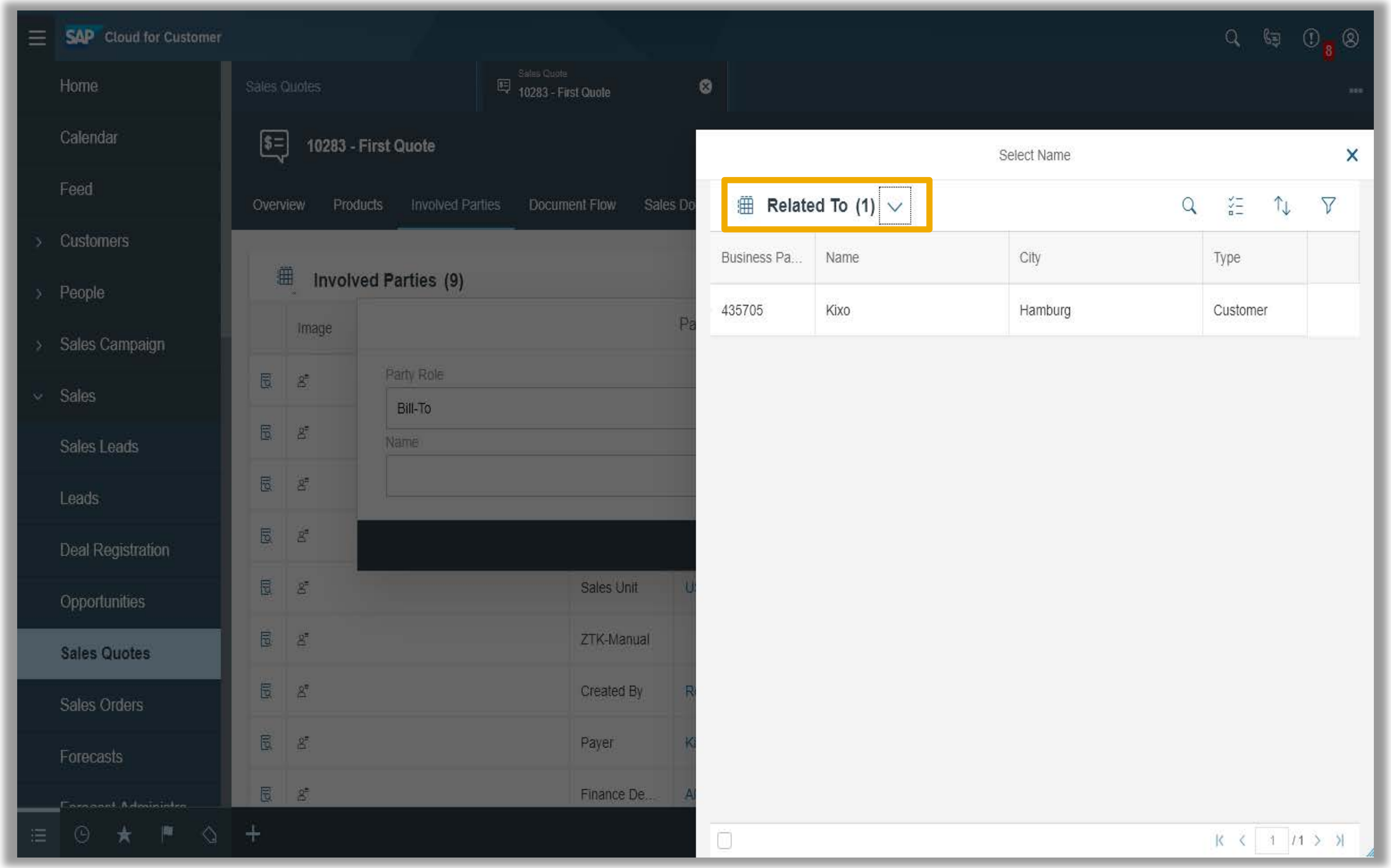
Account & Contact: New Sales Area Fields (Price Group and Price List)



Set-up Details

- A new BC tuning activity has been introduced under accounts to maintain custom price groups and price lists values
- The values in the two activities would typically be maintained to correspond to the values in SAP ECC.
- These fields can be used by the pricing engine in SAP Cloud for Customer.

Account & Contact: New “Related To” Query for Easy Selection of Involved Parties and Account Team



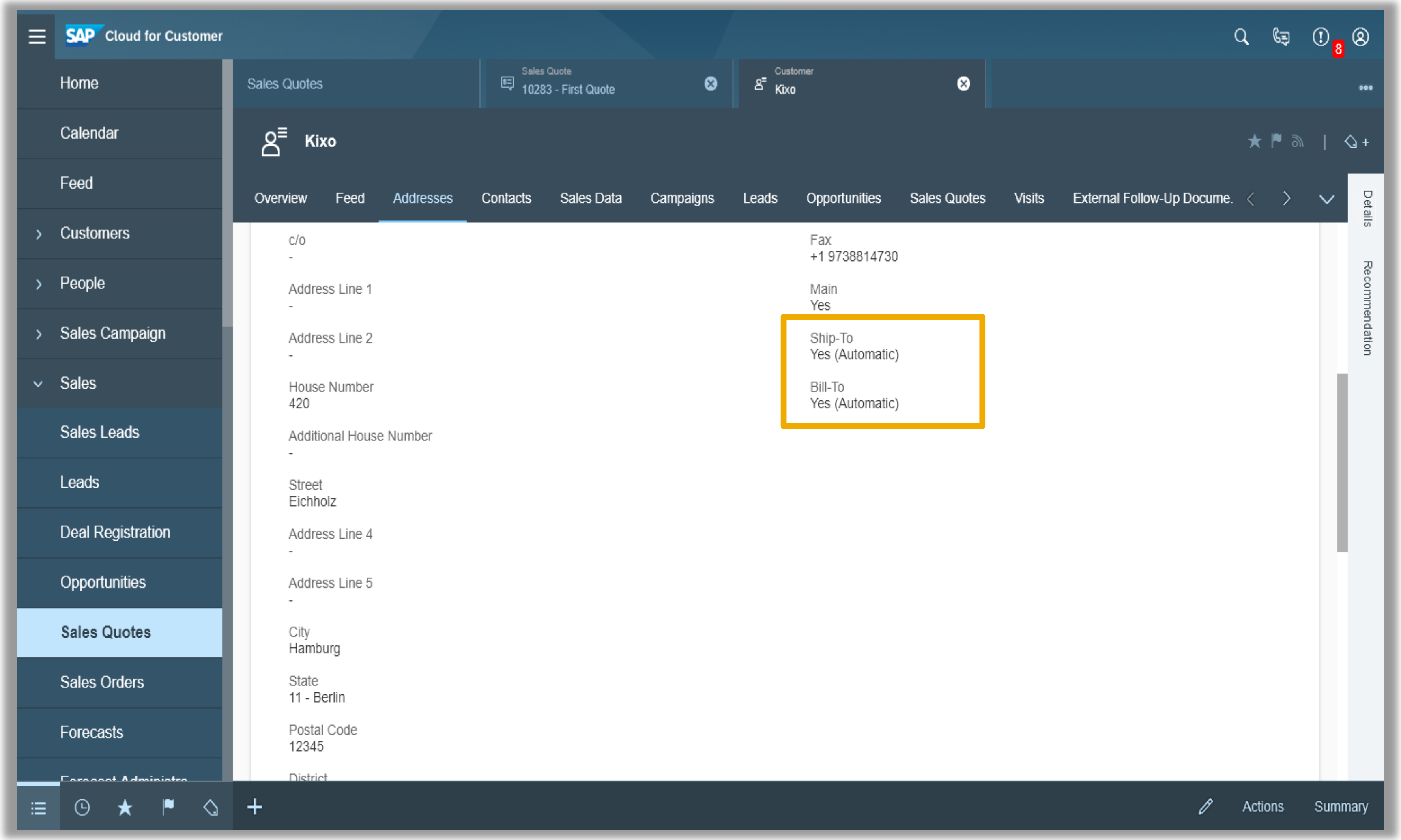
A new standard query allows you to filter business partners that are linked to a selected account or other business partner.

- For example, a sales rep wants to assign a partner contact to a sales quote (under the involved parties tab). The name of contact is Kate Jacob, however, there are three partner contacts in the system with the name Kate Jacob.
- The rep can now easily select the Kate Jacob with a relationship to the account.

Key Business Benefits

- Prior to 1811, the only possibility to assign the correct “Kate Jacob” was to remember the ID and select the correct one.
- With 1811 , the system will propose the list of BPs which are linked /related to the account

Account & Contact: “Bill-To” and “Ship-To” Indicators in Account Datasource



The “Account Details” datasource has been enhanced with “Bill-To” and “Ship-To” indicators

- Prior to 1811 address related attributes Bill-To and Ship-To indicators were not exposed for analytical purposes.
- These attributes are now available in the “account details” data source

Further Enhancements

Employee Value help Enhancement: Prior to 1811 the employee value help was a union using the data from the employee, partner contacts and service agents. From 1811 onwards this Value help will honor the instance restrictions potentially maintained for the corresponding views (employee or partner contact). This means that an user will only get partner contacts in the employee value help if he as well has the partner contact view (beforehand (1808) he got partner contacts in the employee value help without the partner contacts view).

New Data Source for Partner and Partner Contact: With 1811, we now deliver two new data sources , one for partner and other one for partner contacts. Customer can now create custom joint data sources using these standard data sources.

Enterprise Search enhancement for Contacts: We have now enhanced enterprise search for contacts based on personal address numbers.

ODATA service for Contact Duplicate check: We now offer an OData service to return duplicate check results for a contact record. This OData service can be used to check if there are matching contacts in the system before creating a contact from an external system.

What's New in Lead & Opportunity Management

What’s New in 1811 for Lead & Opportunity

Key Innovations

- *‘Datahug’ (intelligent sales forecasting) Integration (work in progress – subject to change)*
- Sales Administration Screen Reorganization*
- Set Reason Code When Setting Standard Status From List*
- Advanced Search In Lead Facet Of Account Detail Screen*
- Lead Marketing Permissions update via Data Workbench and OData APIs*
- Opportunity Re-approval Process
- Ability to Include Master Data Extension Fields (e.g. Product) into Lead and Opportunity screens

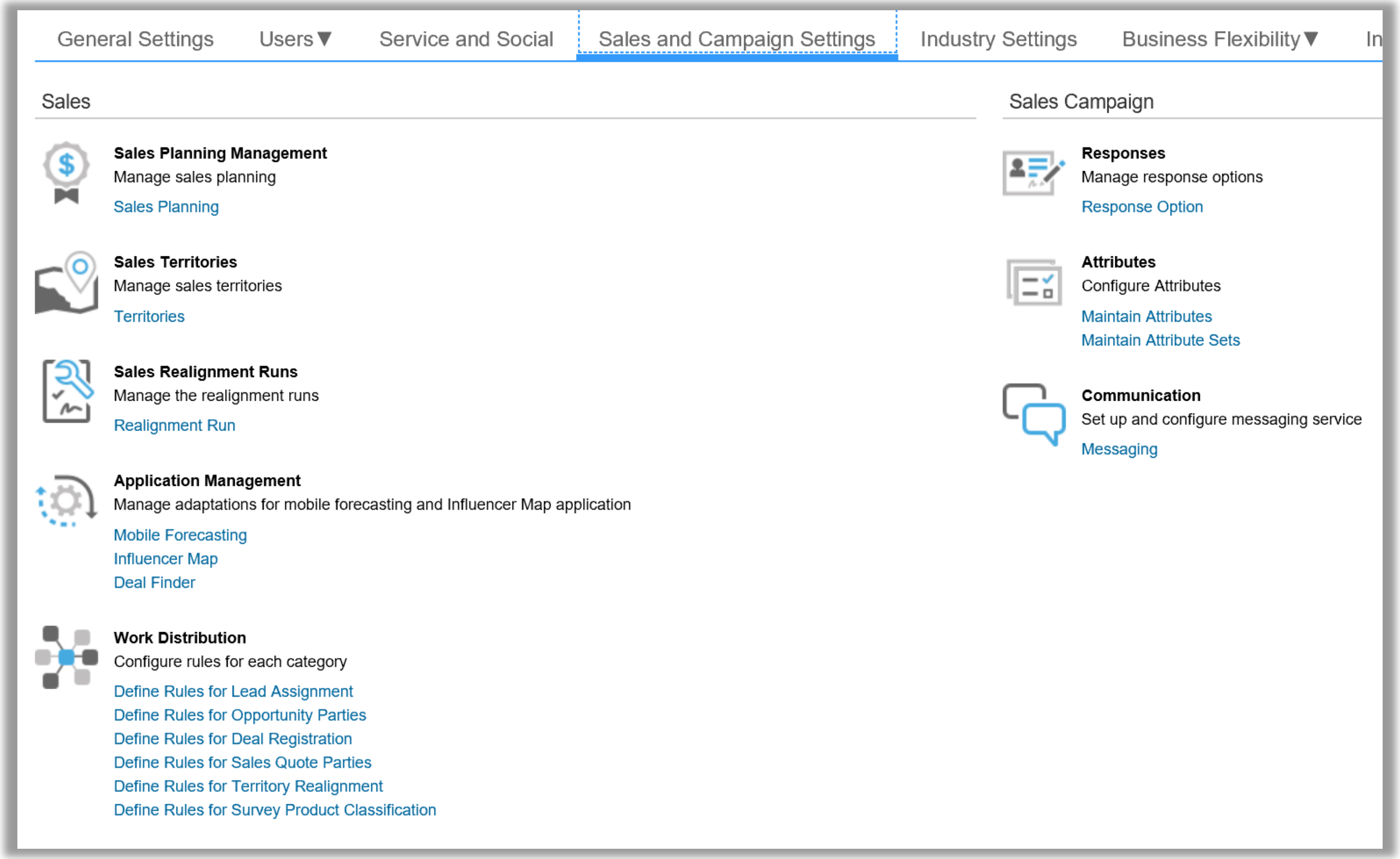
https://datahug.com/

Additional Enhancements

- Lead Change History Includes Changes to Marketing Permissions
- Approval Notifications now Honor Language Adaptation Changes
- Offline Enhancement to Party Processing
- Ability to Upgrade/Downgrade Message Severity of Certain Revenue Planning Error Messages

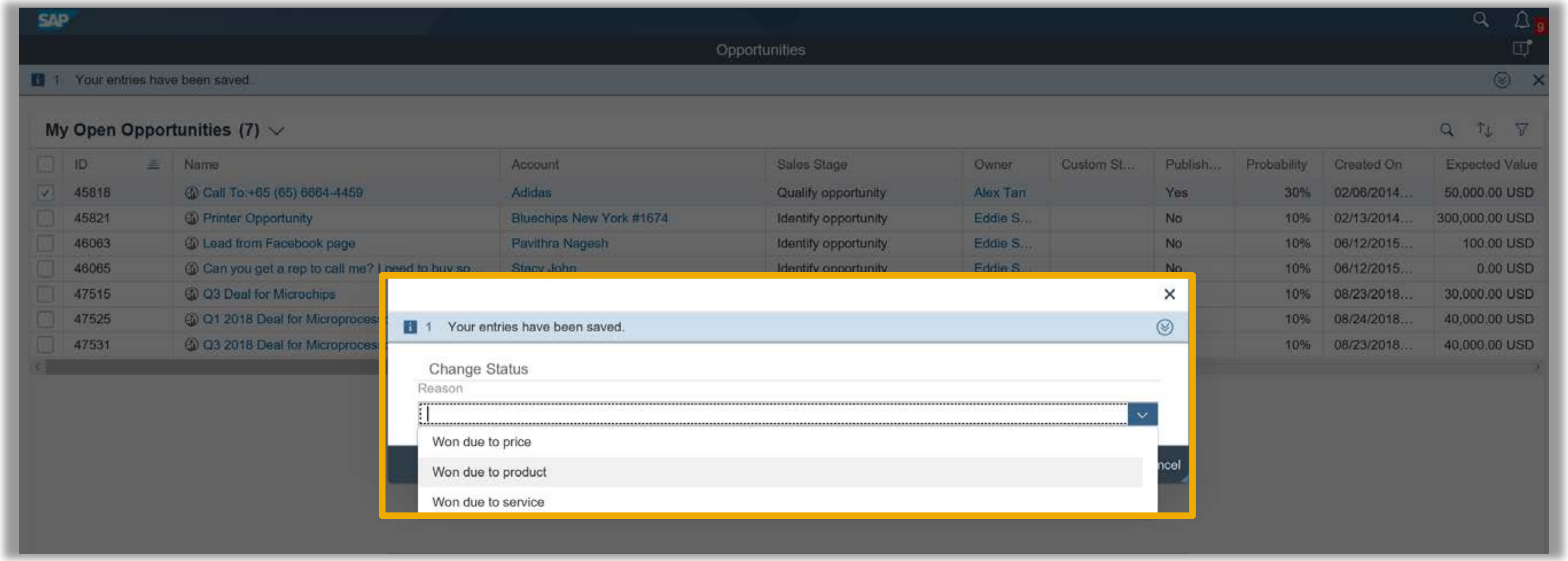
The items with an asterisk* have detailed slides hidden in this deck. Further details for Lead and Opportunity will be available in the Online help and in the Release Overview material.

Sales Administration: Screen Consolidation



Topics have been consolidated and grouped based on the business function they serve under the Sales and Campaign settings

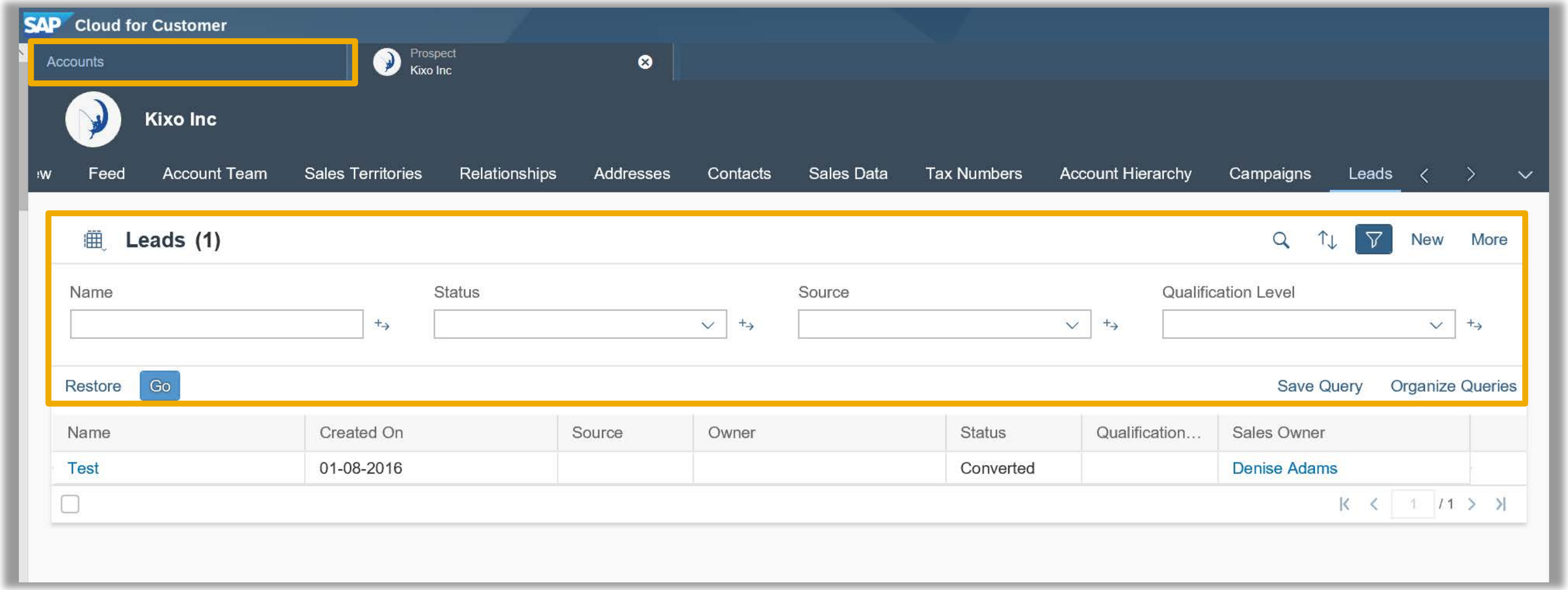
Opportunities: Set Reason Code When Setting Standard Status From List



You can now enter the **reason code** when setting the **standard status** of an **opportunity** from the **date set**

Scoping question, that asks whether the reason code should be required when setting the standard status, should be answered with a Yes.

Advanced Search In Lead Facet Of Account Detail Screen



Ability to carry out an advanced search within the Leads facet of an Account details screen

Lead Marketing Permissions update via DataWorkbench and OData APIs

Name	Size	Packed	Type	Modified	CRC32
..			Local Disk		
Lead.csv	3,549	821	Microsoft Excel Co...	9/25/2018 7:46 ...	E1AEFA53
Lead_Business_Transaction_Document_Reference.csv	171	102	Microsoft Excel Co...	9/25/2018 7:46 ...	08D64BE7
Lead_Contacts.csv	72	40	Microsoft Excel Co...	9/25/2018 7:46 ...	705CEBFE
Lead_Installed_Objects.csv	103	77	Microsoft Excel Co...	9/25/2018 7:46 ...	D88A9B23
Lead_Involved_Parties.csv	151	69	Microsoft Excel Co...	9/25/2018 7:46 ...	501F524D
Lead_Marketing_Permission_Channel_Permission.csv	45	39	Microsoft Excel Co...	9/25/2018 7:46 ...	BCEA29B0
Lead_Marketing_Permission_Communication_Type_Permission.csv	63	57	Microsoft Excel Co...	9/25/2018 7:46 ...	A928269B
Lead_Party_Information.csv	94	51	Microsoft Excel Co...	9/25/2018 7:46 ...	51D38BE3
Lead_Products.csv	164	97	Microsoft Excel Co...	9/25/2018 7:46 ...	4D4FAFEE
Lead_Sales_and_Marketing_Team.csv	97	54	Microsoft Excel Co...	9/25/2018 7:46 ...	C01A4AB0

Ability to update Lead marketing permissions via Data workbench and ODATA APIs

What’s New in Machine Learning for Sales

What’s New in 1811 for Machine Learning in Sales

Key Innovations

- Variable contribution that improves score interpretation
- Opportunity Insights within Overview Page
- Opportunity Time-to-Close Date Prediction
- Demandbase Integration via Account Insights (Beta)
- Enhancements to Integration with server-side groupware integration OEM provider Invisible solutions, usage of activity data in ML models for lead and opportunity scoring

Details of Machine Learning innovations will be available in On-line help and in the Release Overview webinar material

Note: Demandbase is a targeting and personalization platform for business-to-business (B2B) companies. This integration is focused on developing the propensity-to-buy score.

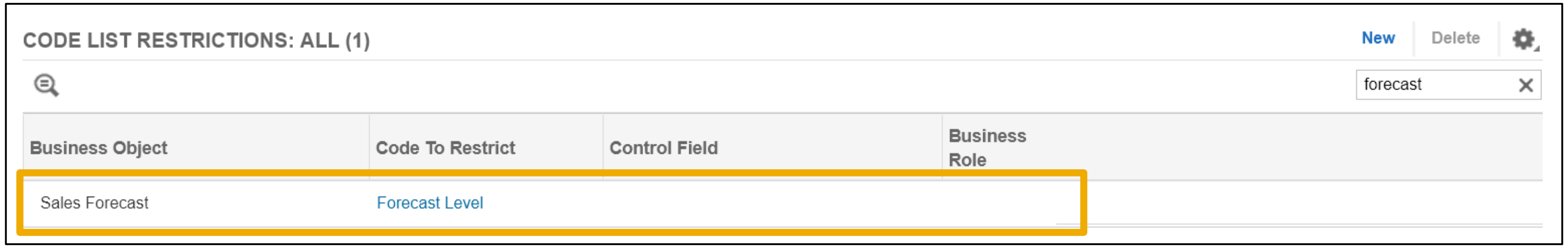
What’s New in Sales Planning and Forecasting

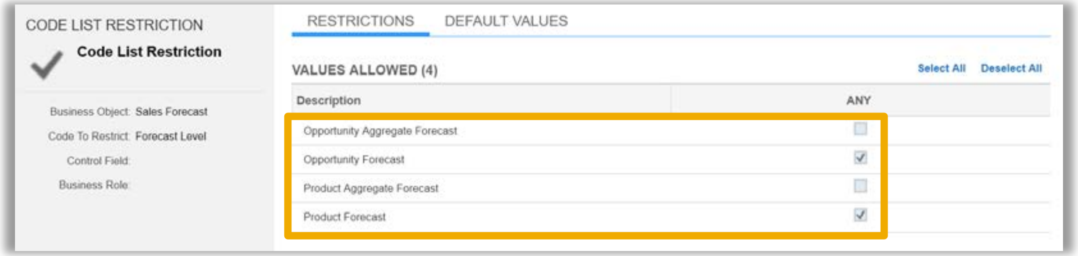
What’s New in 1811 for Sales Planning and Forecasting

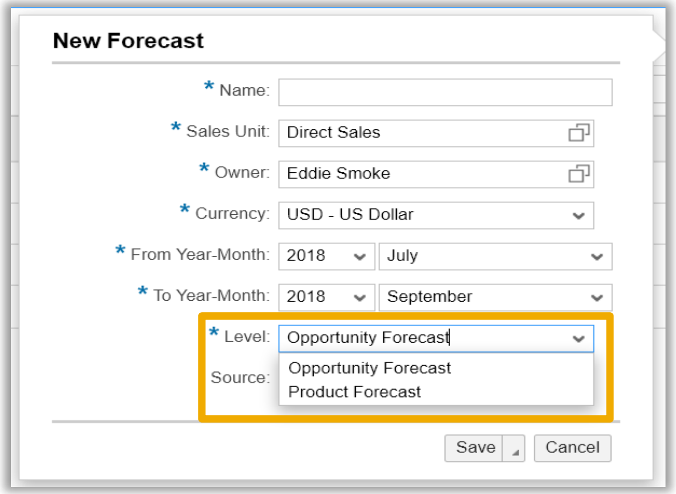
Enhancements

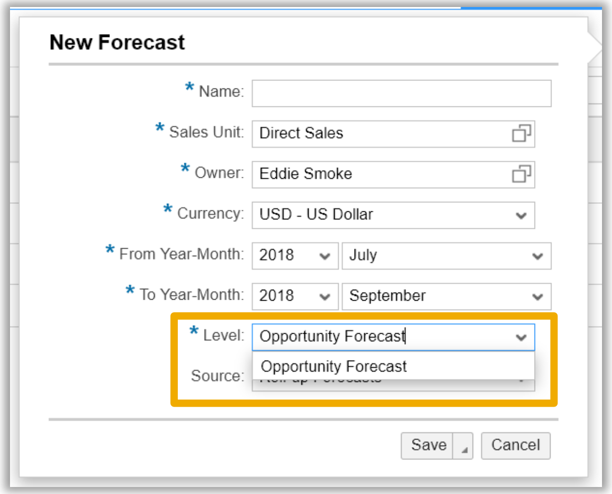
- Hide Product Forecast level

Sales Planning and Forecasting: Hide Product Forecast level









A new code list Restriction is available:

- Sales Forecast

Key Business Benefits

- While fine tuning activity for sales forecast, if the user has selected 'Opportunity Forecast' only then while creating a new forecast, the user will not see 'Product Forecast'. This makes forecast creation simple by removing unwanted fields.

Set-up Details

- Go to Administration > Code List Restrictions
- Select the "Sales Forecast" Business object.
- Click on 'Forecast Level'
- Choose the values of forecast level that should be displayed for new forecast creation

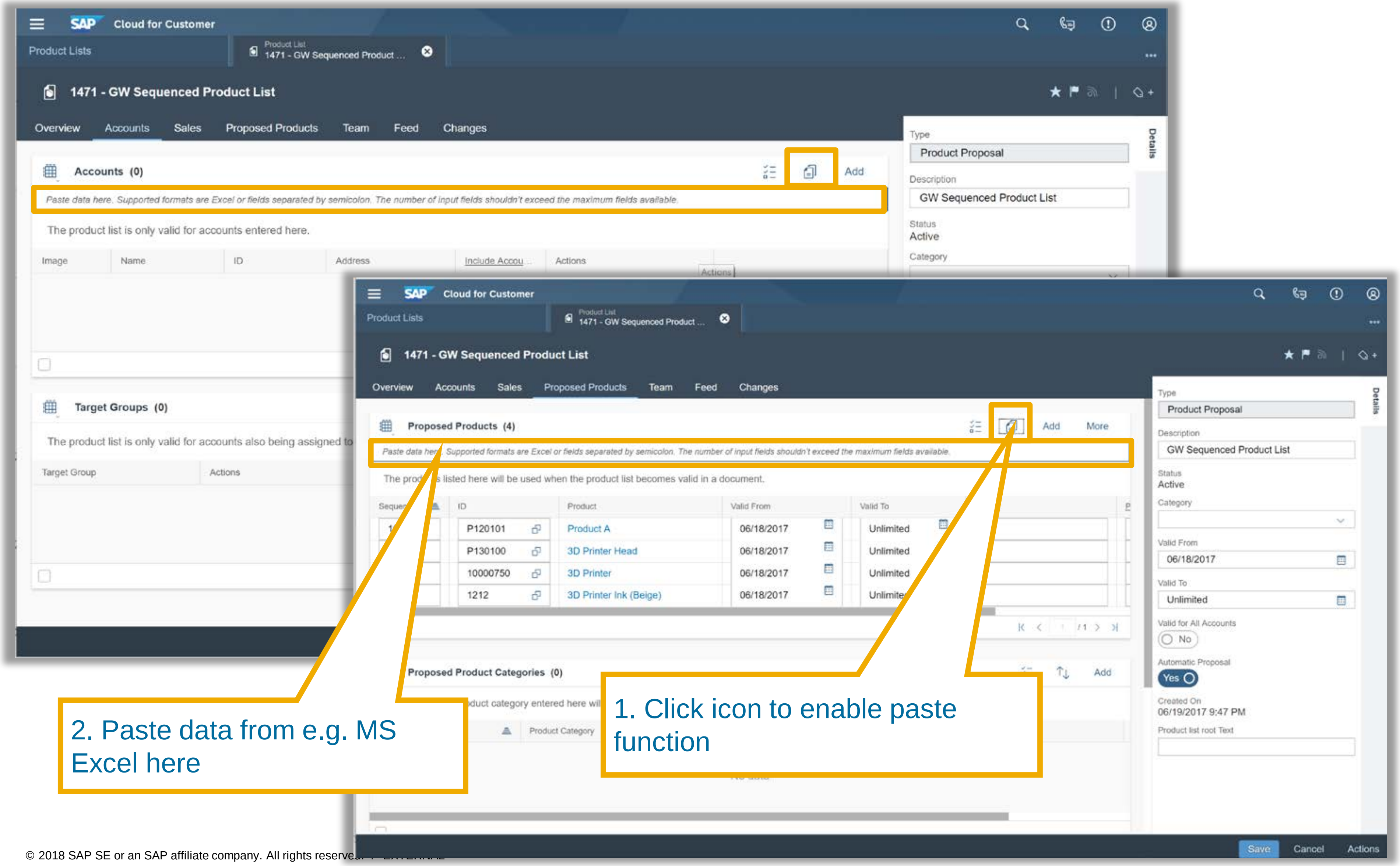
What’s New in Product Lists

What’s New in 1811 for Product Lists

Key Innovations and Enhancements

- Mass entry of Accounts and Products via Copy & Paste
- Show Product Lists for Individual Customers

Product List: Mass entry of Accounts and Products via Copy & Paste



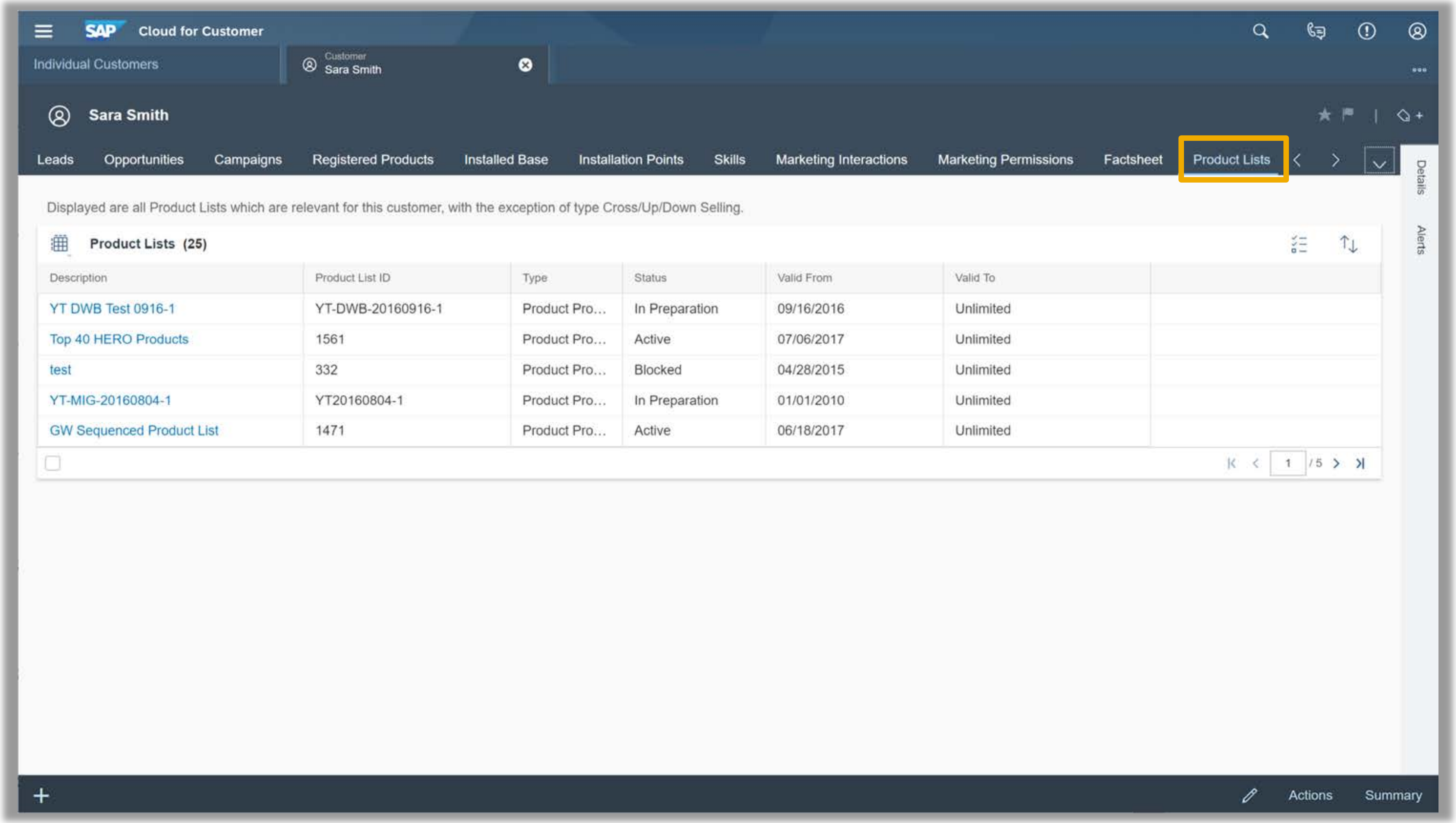
You can (in Fiori Client) copy accounts or proposed products from MS Excel via copy & paste to the Product List.

Make sure that the copied data **exactly matches the order of columns** in the user interface, whereby combined fields represent two columns.

Note, that the number of input fields shouldn't exceed the maximum column fields exposed.

Referenced idea in Customer Influence: https://influence.sap.com/sap/ino/#/idea/204834

Product List: Show Product Lists for Individual Customers



You can now view Product Lists related to an individual customer.

Add hidden tab Product Lists to detail view of Individual Customer via Adaptation mode.

Referenced idea in Customer Influence: https://influence.sap.com/sap/ino/#/idea/207731

What’s New in Contracts

What’s New in 1811 for Contracts*

Key Innovations

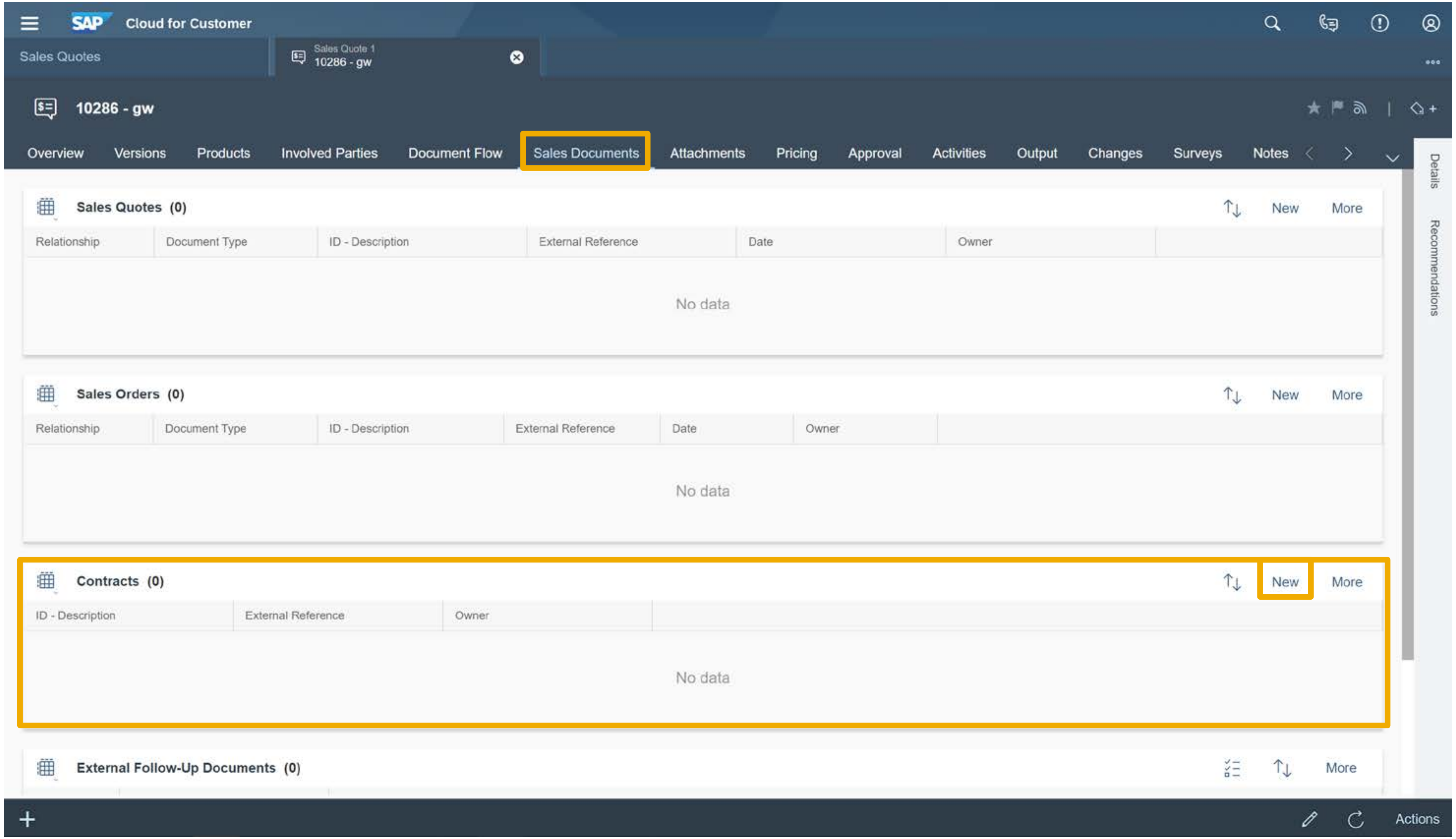
- Sales Contract as Follow-Up to Quote*
- Incoterms
- Form Template Selection
- Extension Flow:
  – Sales Arrangement to Contract
  – Product [General Information] to Contract Item
  – Product [Product Sales] to Contract Item
- Copy/ Paste from Excel [Item, Covered Objects, Entitled/Excluded Services & Parts]

Additional Enhancements

- Introduce Sales Office/ Sales Group
- Consider Contracts in Enterprise Search
- Data Source Enhancements (Billing Plan Parameter, Owner)
- Performance Improvements “Entitled Services & Parts”
- Editability of Covered Object and “Entitled Services & Parts”
- Allow change of Type as Mass Correction via Data Workbench
- Further Code List Restrictions (…)
- Enhance Live Activity by Contracts
- Cross Topic/ Adoption
  - Business Partner Merge Process Enhancement
  - Enable My Account Team in Business Partner value help

*Notes: See the Service deck for detailed slides on Contract capabilities.
For the Sales Contract as a follow-up to Quote, slides are hidden in this deck

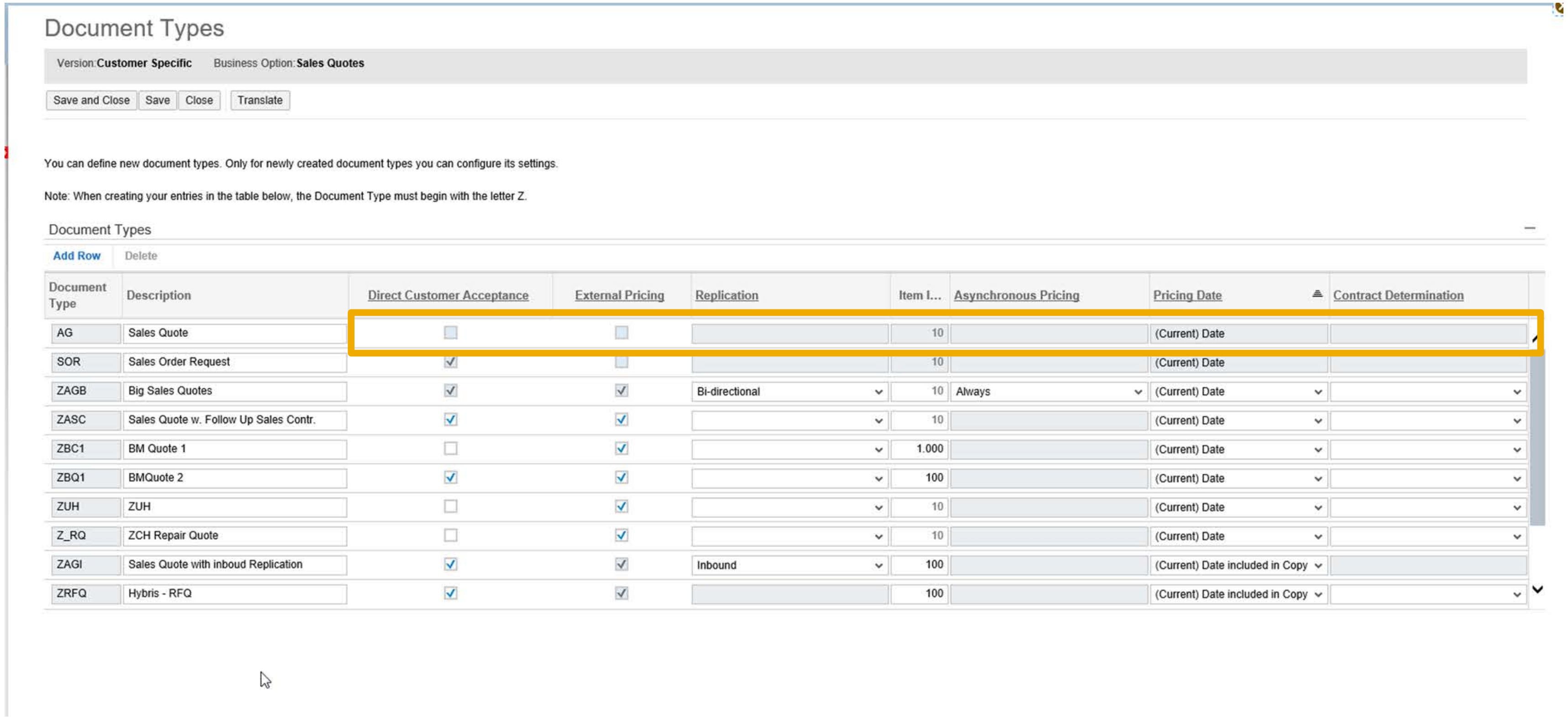
Topic Area Sales Quote: Create follow-up contract from Sales Quote



Business Description

- You can now create a follow-up sales contract from a sales quote in order to offer a contract to a customer using the sales quote.
- If a follow-up contract item is created from sales quote, quote will turn to Won.
- Add hidden section Contracts to Sales Documents facet. You can also add header quote field *Requested End Date”*, that represent the contract validity together with field *Requested Date*.

Topic Area: Sales Contract as Follow-Up to Quote #1 BC


Document Types

Version: **Customer Specific** Business Option: **Sales Quotes**

Save and Close | Save | Close | Translate

You can define new document types. Only for newly created document types you can configure its settings.

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

Document Types

Add Row | Delete

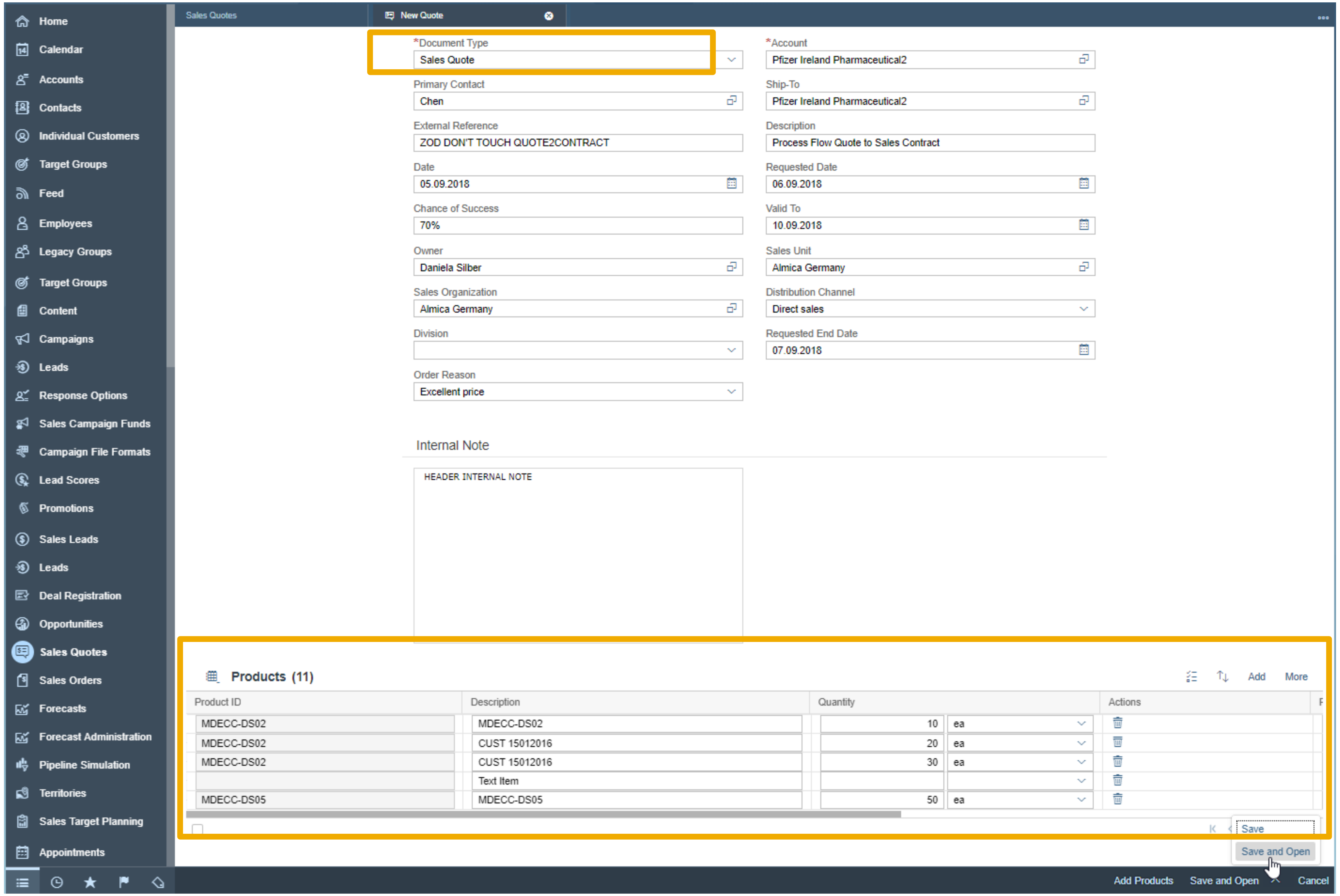
Document Type	Description	Direct Customer Acceptance	External Pricing	Replication	Item I...	Asynchronous Pricing	Pricing Date	Contract Determination
AG	Sales Quote	☐	☐		10		(Current) Date	
SOR	Sales Order Request	☑	☐		10		(Current) Date	
ZAGB	Big Sales Quotes	☑	☑	Bi-directional	10	Always	(Current) Date	
ZASC	Sales Quote w. Follow Up Sales Contr.	☑	☑		10		(Current) Date	
ZBC1	BM Quote 1	☐	☑		1.000		(Current) Date	
ZBQ1	BMQuote 2	☑	☑		100		(Current) Date	
ZUH	ZUH	☐	☑		10		(Current) Date	
Z_RQ	ZCH Repair Quote	☐	☑		10		(Current) Date	
ZAGI	Sales Quote with inboud Replication	☑	☑	Inbound	100		(Current) Date included in Copy	
ZRFQ	Hybris - RFQ	☑	☑		100		(Current) Date included in Copy	

Set-up Details

- Prerequisite: Quote Type for Quote2Contract scenario has to be set on ´not integration relevant! [No Flag in BC]
- Scenario is only enabled for Quote to Sales* Contracts!

* Note: A scenario to sell a [template based] Service Contract (e.g. as ´Extended Warranty´) together with a Product as ´Package´ is currently not supported!

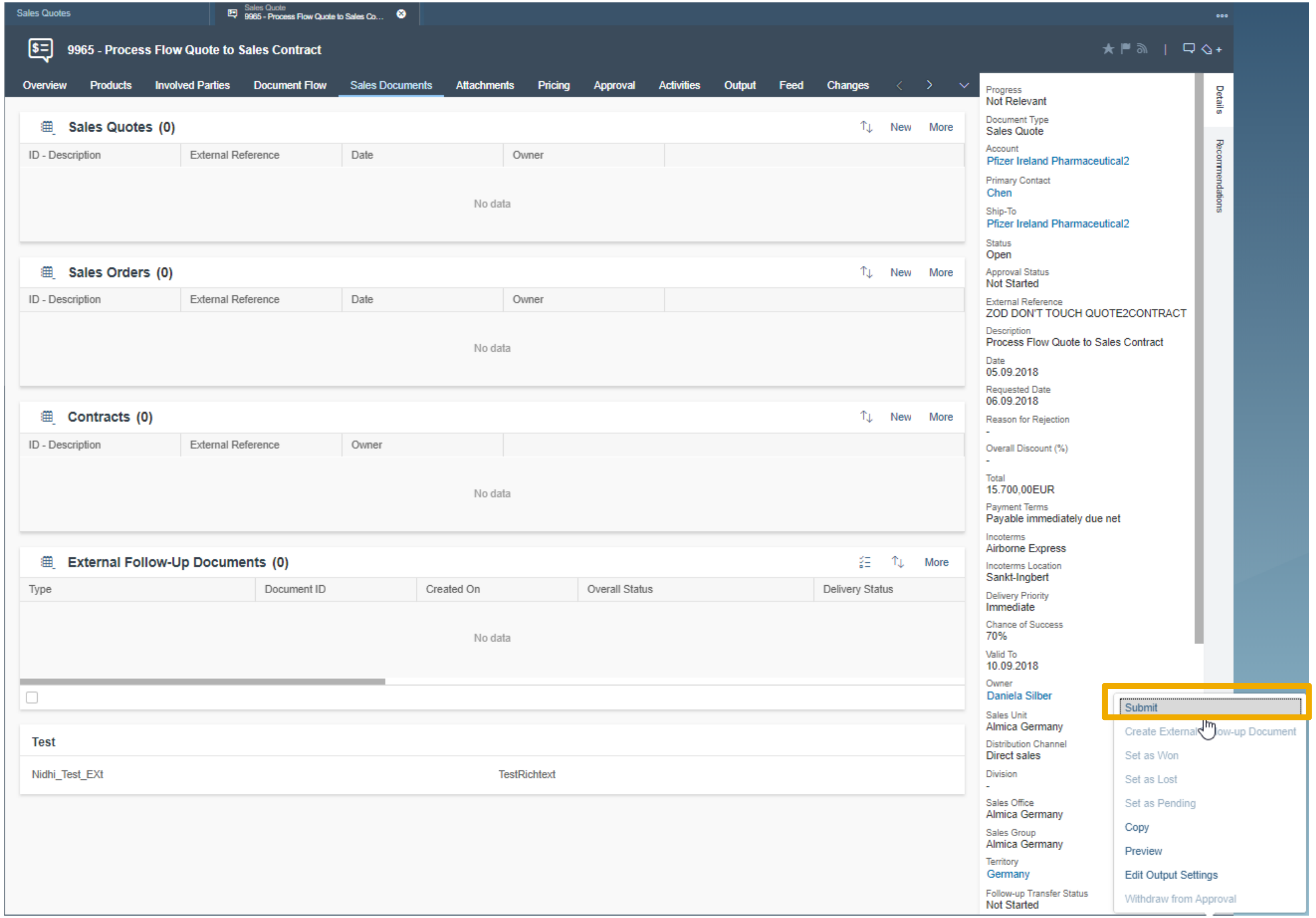
Topic Area: Sales Contract as Follow-Up to Quote # Basic Set-Up Step 1



Set-up Details

- Select a Quote type, which is not (!) integration relevant [see Quote Document Types in Business Configuration]
- Add Product Items/ or use Defaulting

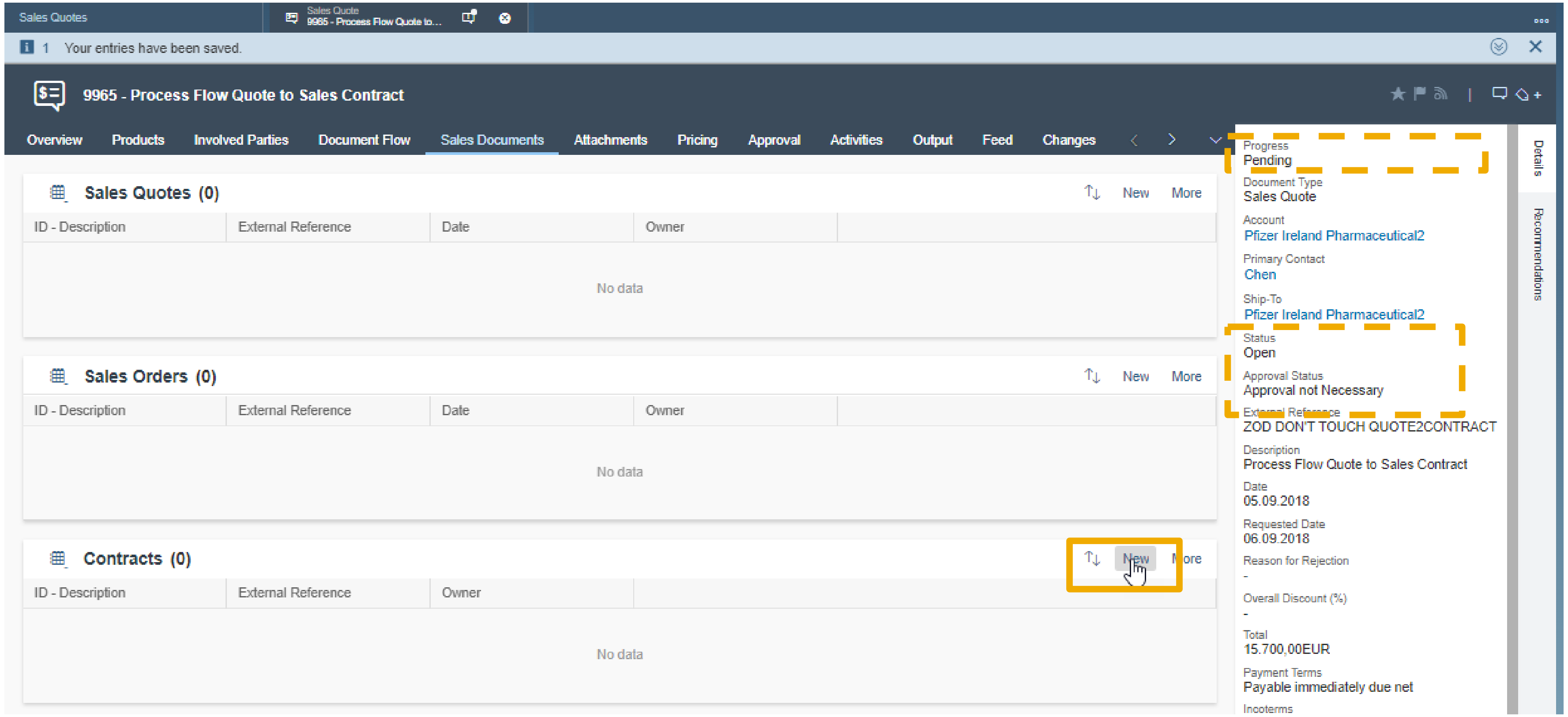
Topic Area: Sales Contract as Follow-Up to Quote # Basic Set-Up Step 2



Set-up Details

- Submit of Quote is prerequisite for the following steps
- Process Price Determination

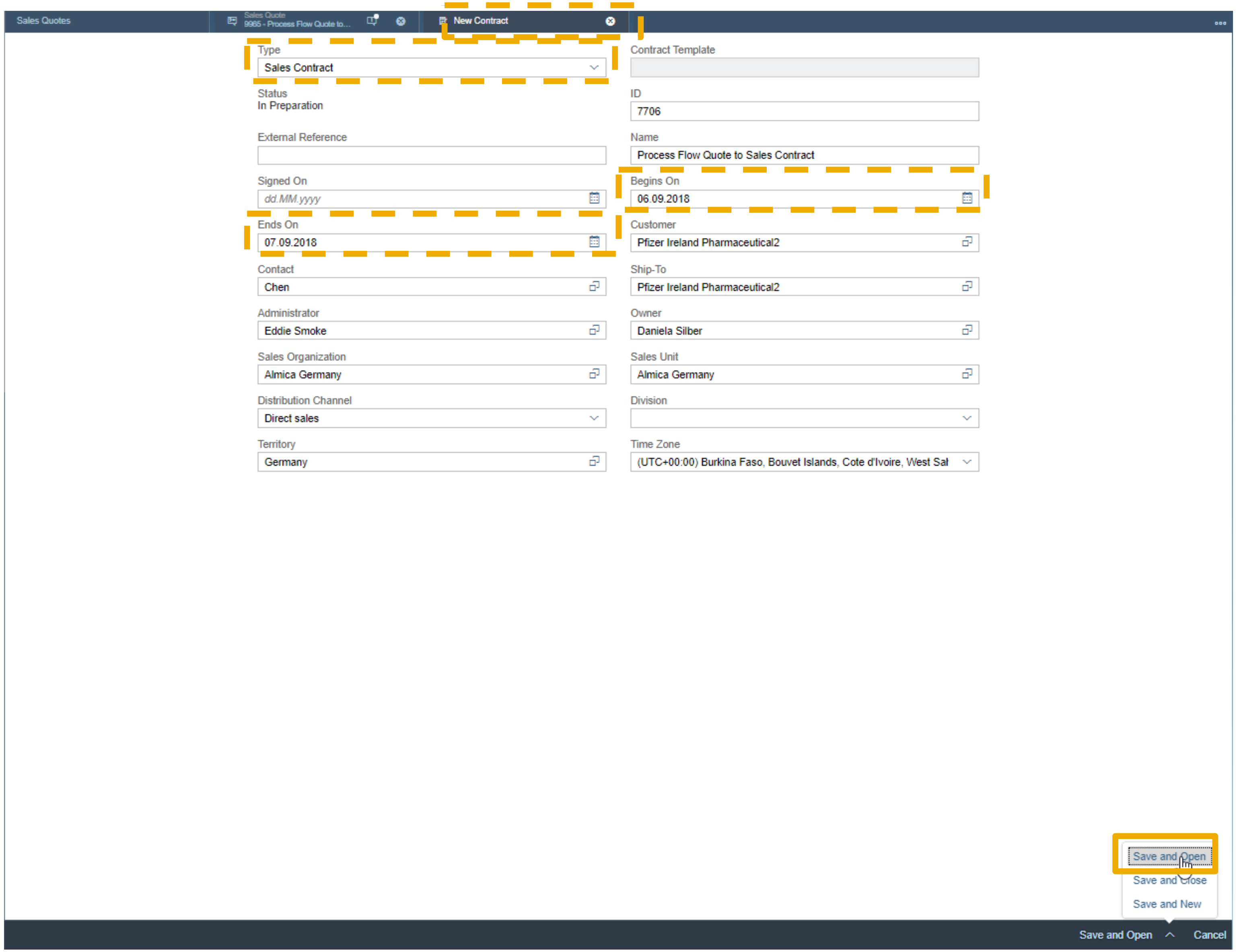
Topic Area: Sales Contract as Follow-Up to Quote # Basic Set-Up Step 3



Set-up Details

- Click ´New´ in table Contracts of Facet Sales Documents to start Sales Contract Follow up

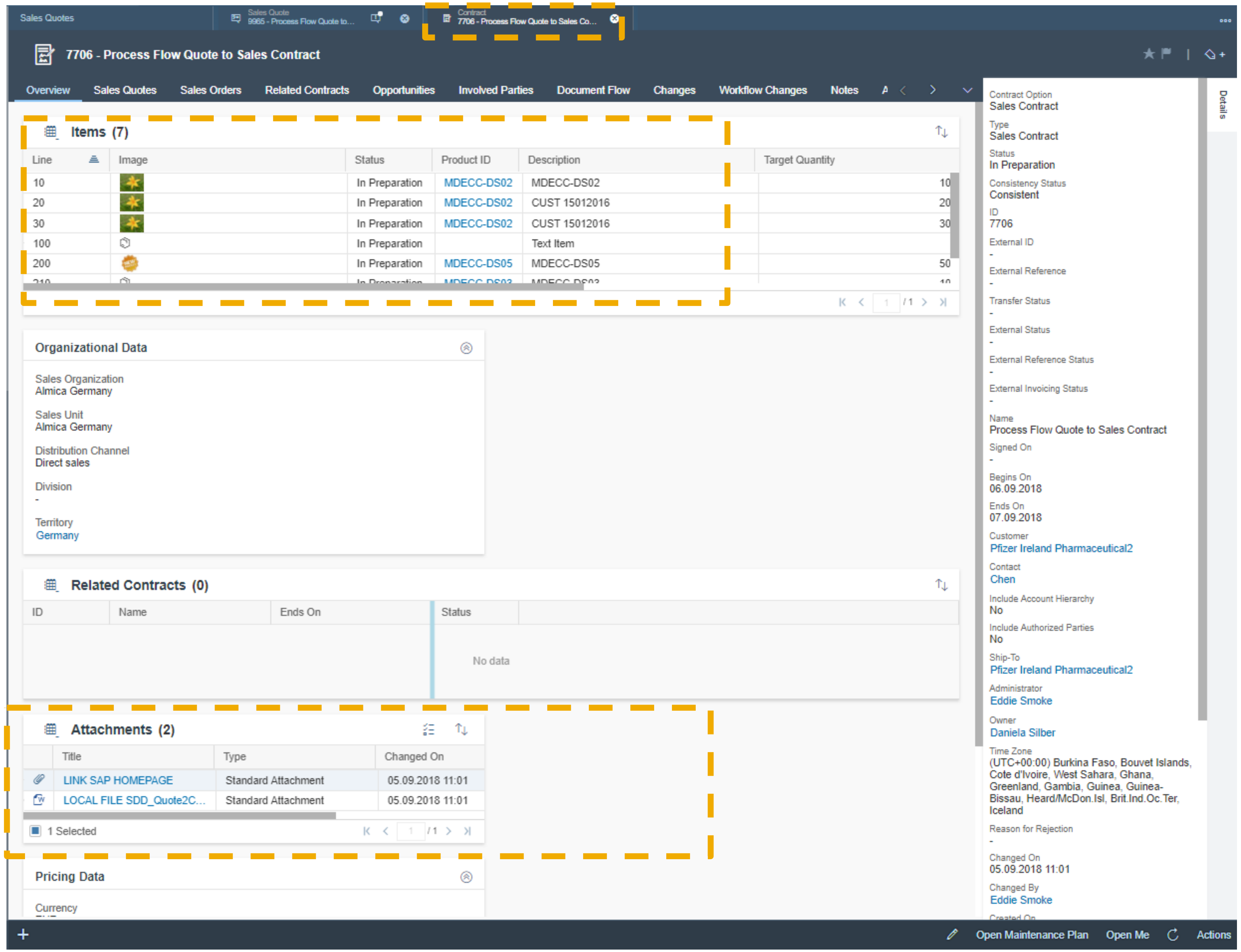
Topic Area: Sales Contract as Follow-Up to Quote # Basic Set-Up Step 4



Set-up Details

- Quick Create of Sales Contract using relevant data of Sales Quote as default will be opened
- Note that also ´Begins On´ and ´Ends On´ dates for the contract are copied from the Quote

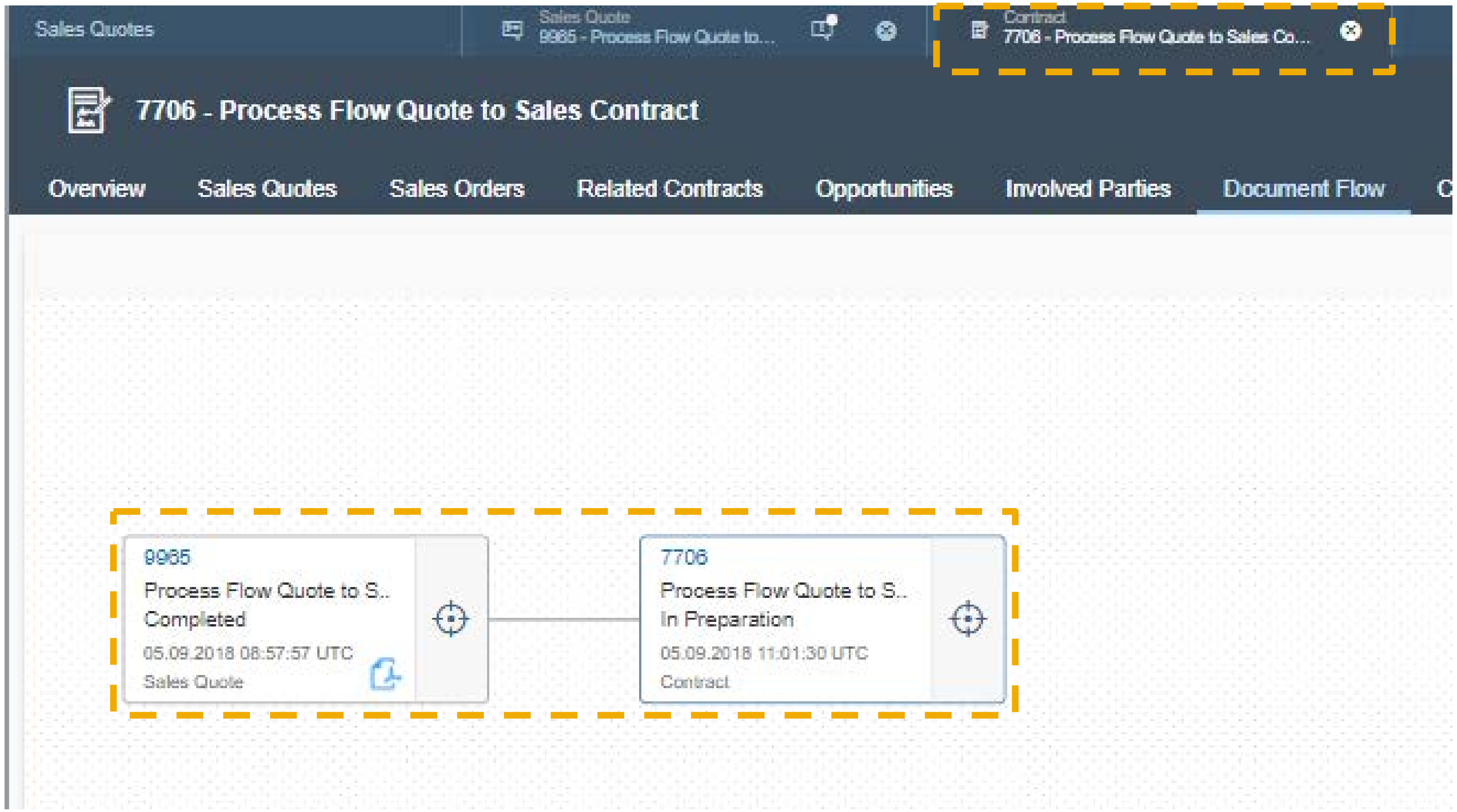
Topic Area: Sales Contract as Follow-Up to Quote # Basic Set-Up Step 5



Set-up Details

- Note that also all Items [incl. Pricing!] and attachments of the quote are copied over to the Sales Contract
- Nevertheless it is possible to change the prices in the contract for the products

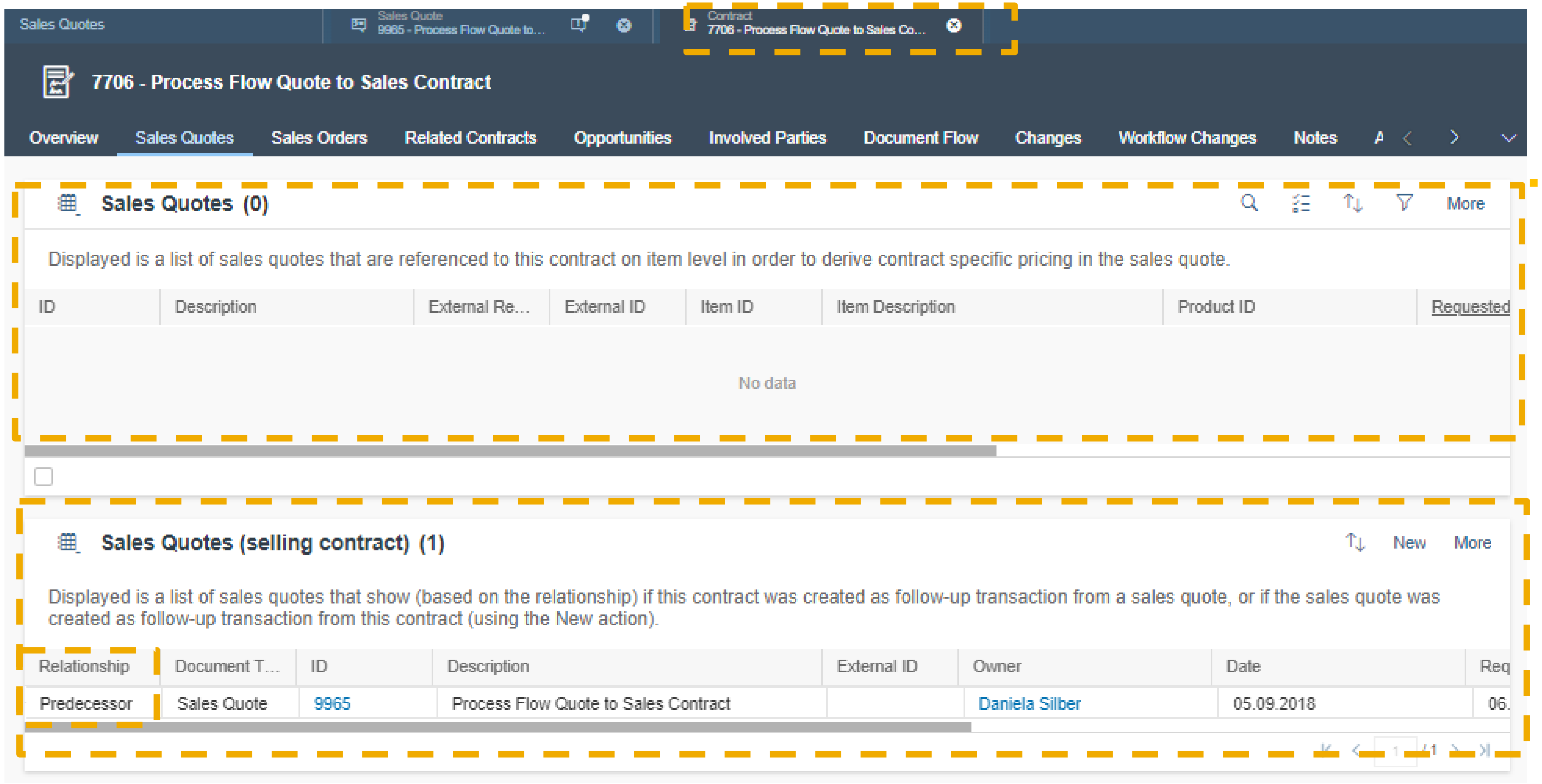
Topic Area: Sales Contract as Follow-Up to Quote # Basic Set-Up Step 6



Set-up Details

- Note that in the Document Flow of the Sales Contract all relating Quotes as Predecessor [and/or Successor] are listed

Topic Area: Sales Contract as Follow-Up to Quote # Basic Set-Up Step 7

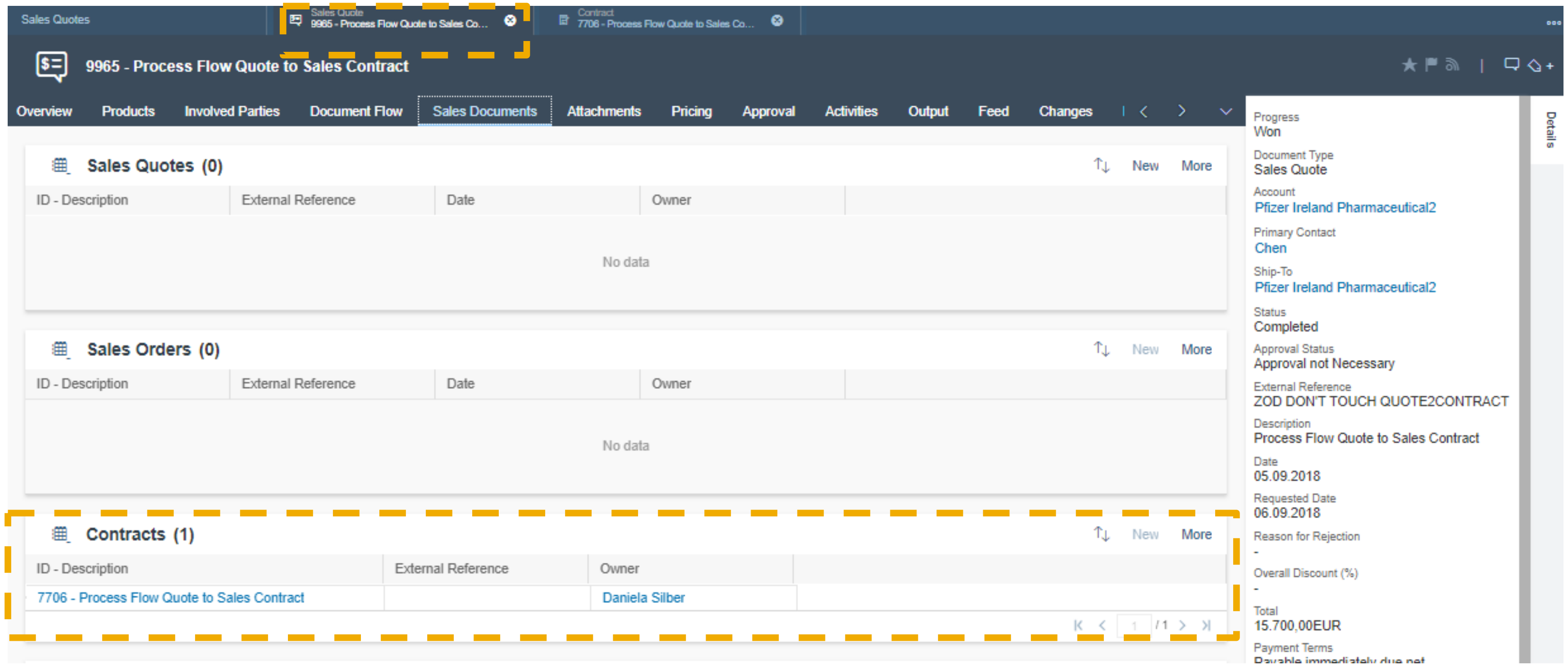


Set-up Details

In the Facet Sales Quotes of the Sales Contract we have two sections to differentiate Sales Quotes usage:

- \`Sales Quotes´ used to derive a contract specific pricing for a quote
- ´Sales Quotes [selling contract]´ used -indicated by ´Relationship´- for set up and renewal of this contract

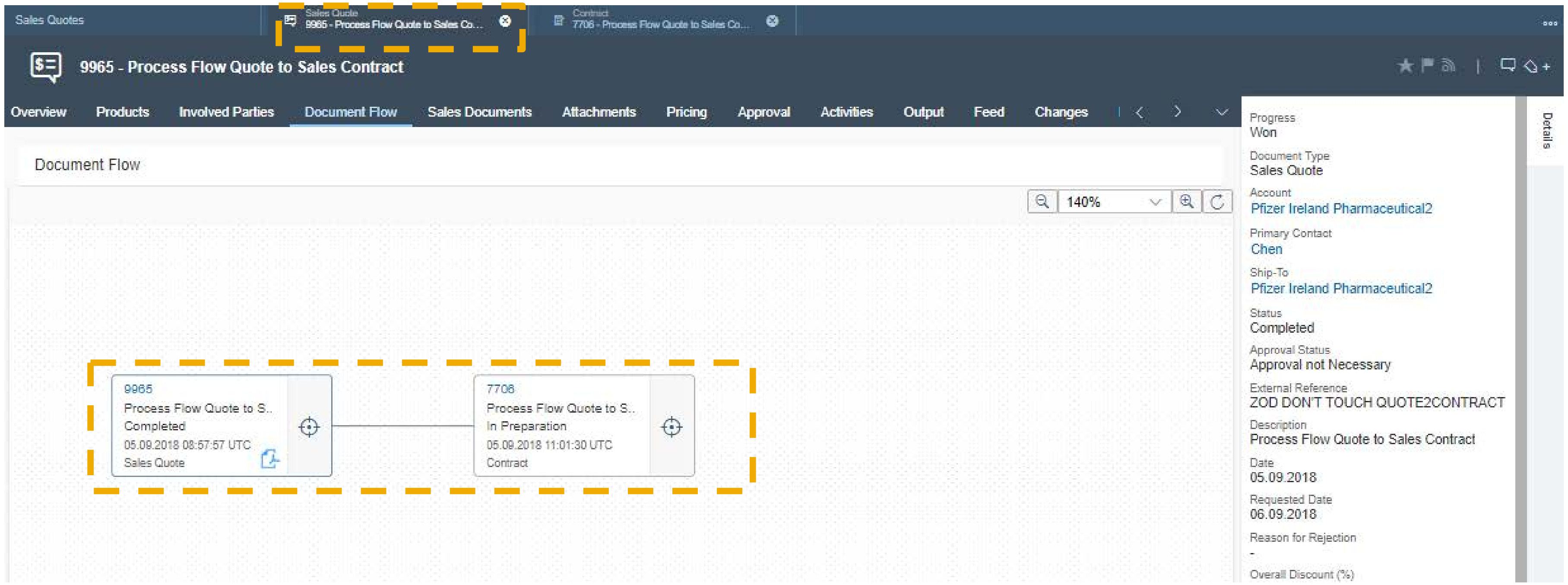
Topic Area: Sales Contract as Follow-Up to Quote # Basic Set-Up Step 8



Set-up Details

- In the Facet Sales Documents of the Sales Quote we have section that indicate all contracts
  - triggered by the quote in a contract set up and
  - triggered by a contract in a contract renewal scenario

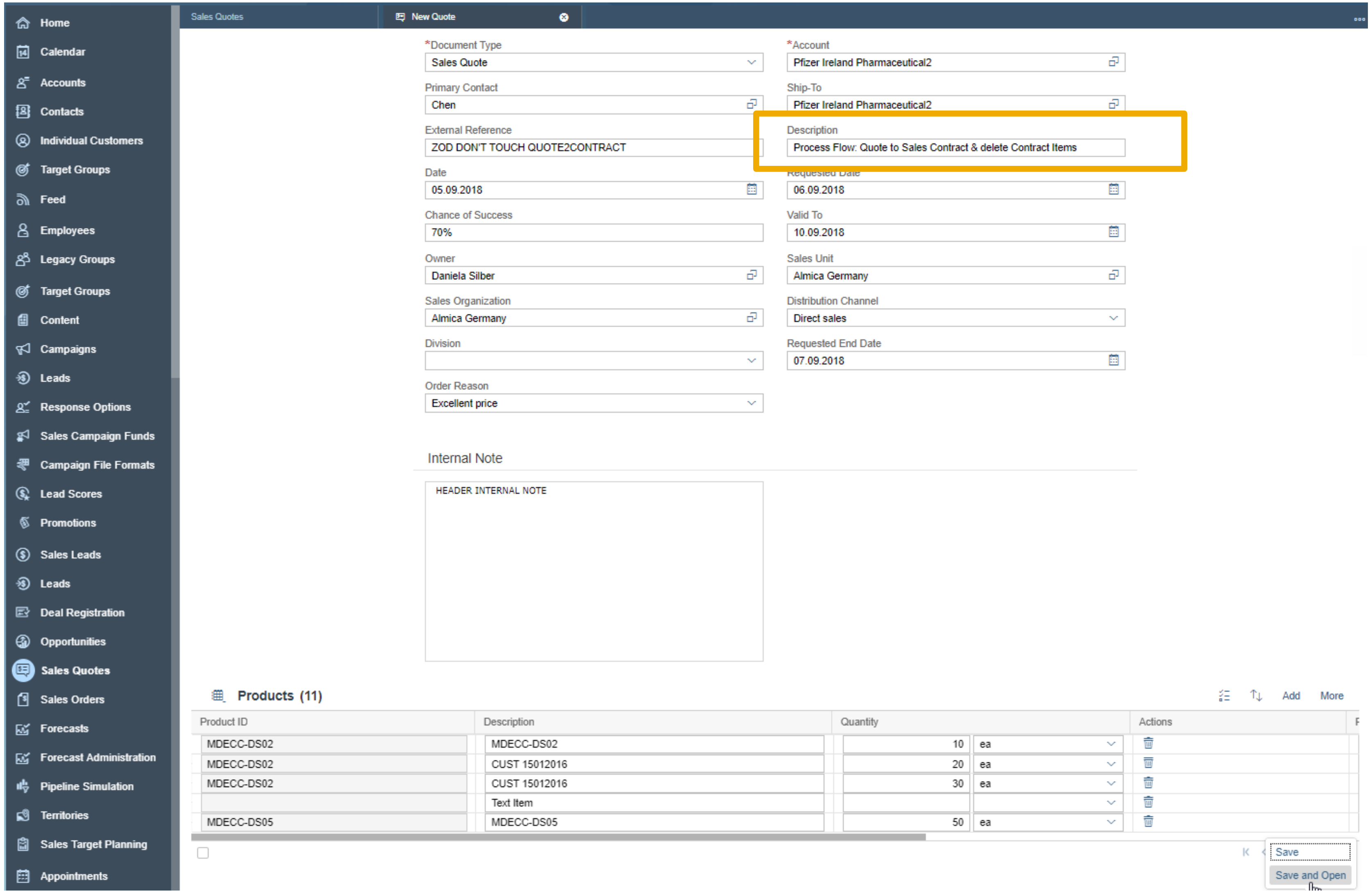
Topic Area: Sales Contract as Follow-Up to Quote # Basic Set-Up Step 9



Set-up Details

- Note that in the Document Flow of the Sales Quote the relating Contract is listed

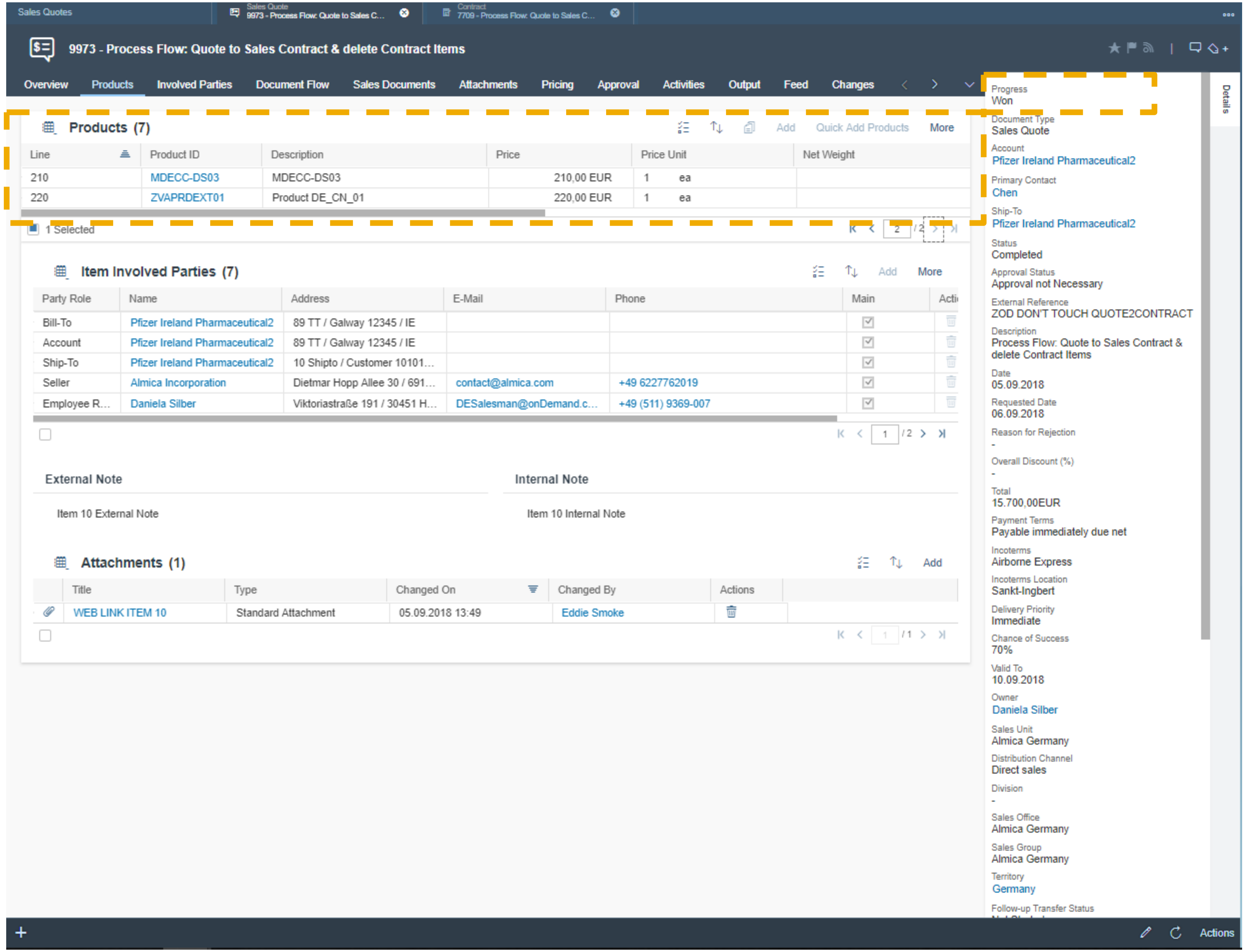
Topic Area: Sales Contract as Follow-Up to Quote # Basic Change Step 1



Set-up Details

- In a change scenario product defaulted from the quote will be deleted in the relating Sales Contract…
- Start Point is again the Sales Quote…

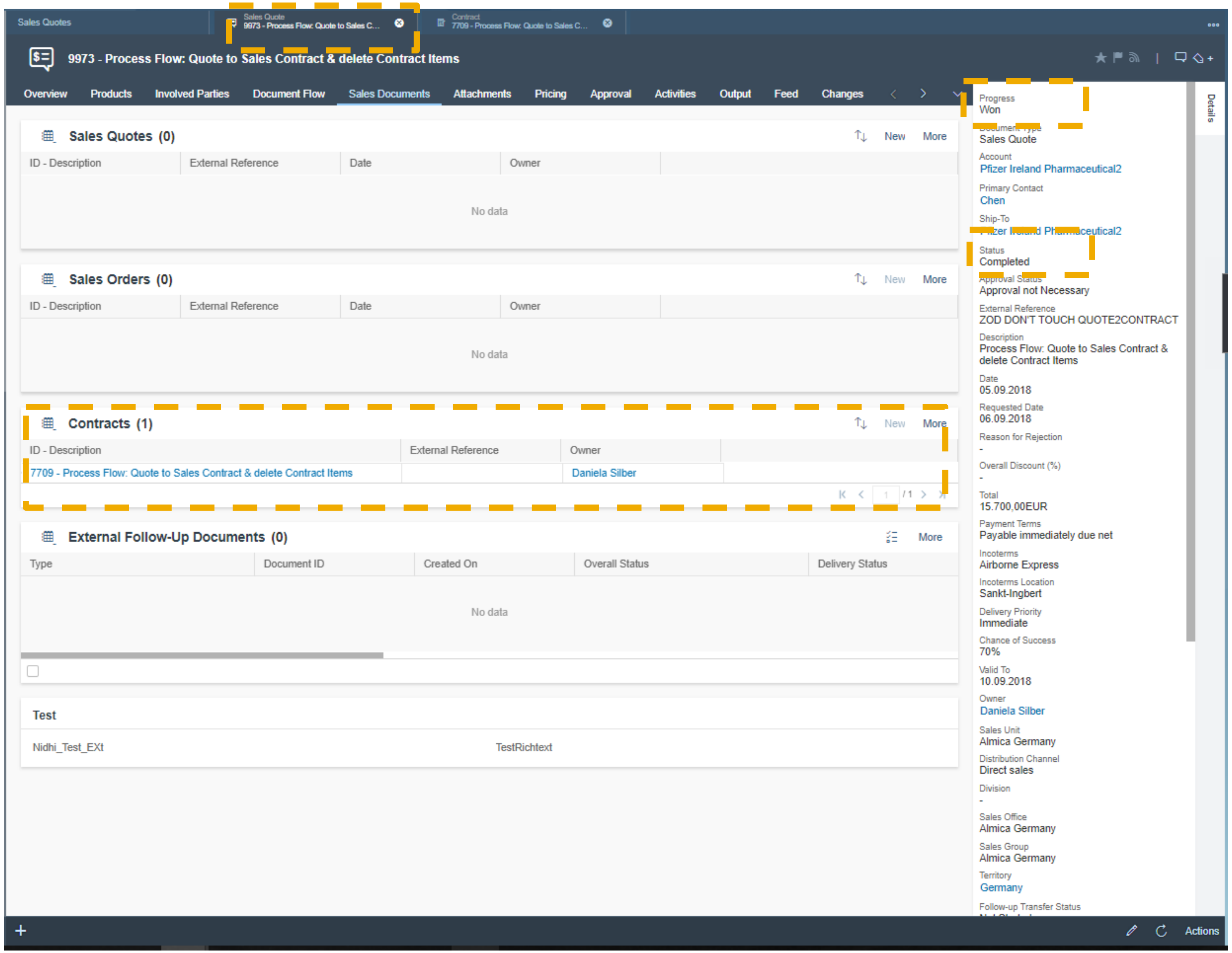
Topic Area: Sales Contract as Follow-Up to Quote # Basic Change Step 2



Set-up Details

- In the following change scenario products defaulted from the quote are deleted in the relating Sales Contract…
- Start Pointing was again the Sales Quote…

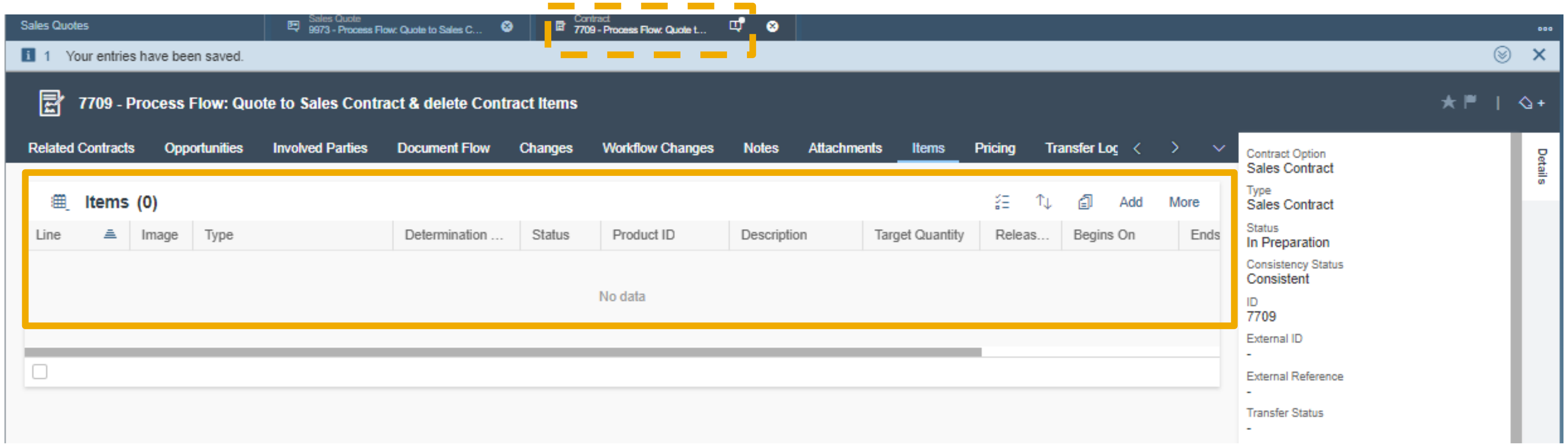
Topic Area: Sales Contract as Follow-Up to Quote # Basic Change Step 3



Set-up Details

- …then a Sales Contract was created and accordingly the Quote Progress Status was set to `won´ and Status to ´completed´

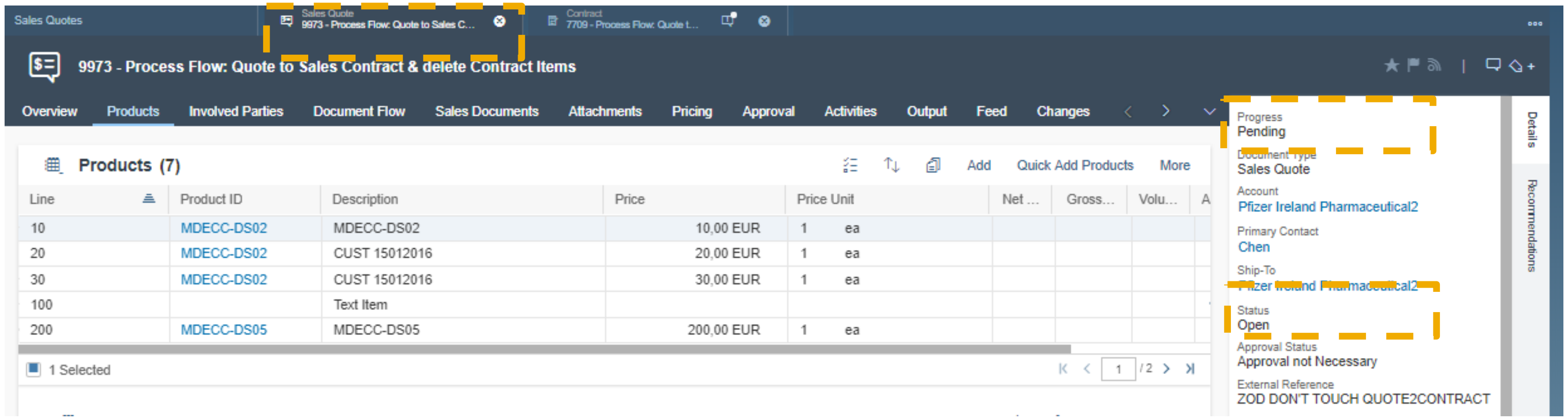
Topic Area: Sales Contract as Follow-Up to Quote # Basic Change Step 4



Set-up Details

- Deletion of all (or some) items in the Sales Contract has an impact on the associated quote
  - Status Change
  - Usability of Quote Product Items

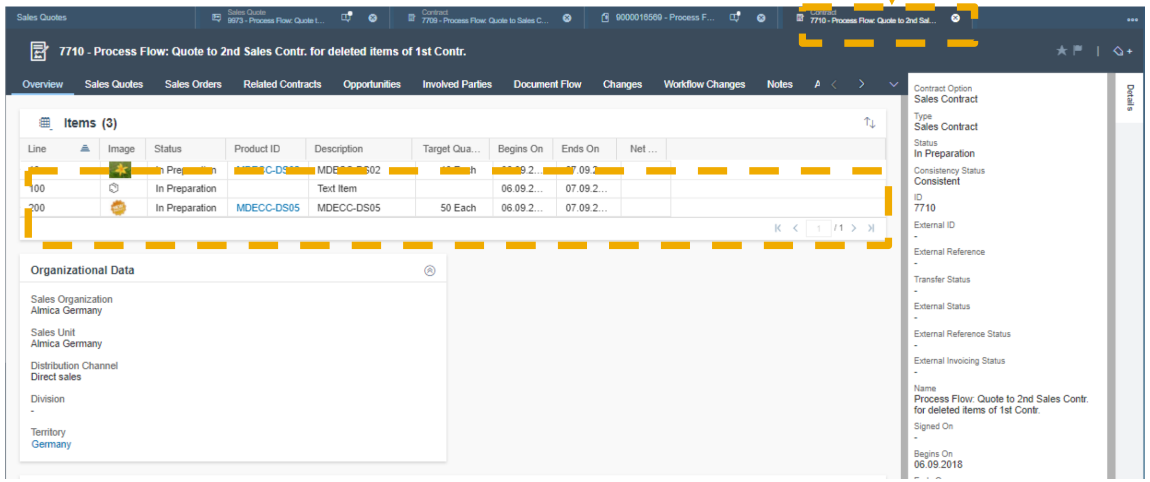
Topic Area: Sales Contract as Follow-Up to Quote # Basic Change Step 5



Set-up Details

- Progress´ & ´Status´ in the initial Quote are changed: ´
  - From ´Won´ to ´Pending
  - From ´Completed´ to ´open´ [if all items in the contracts were removed] or …
    ´in process´ [if some items in the contract were removed]

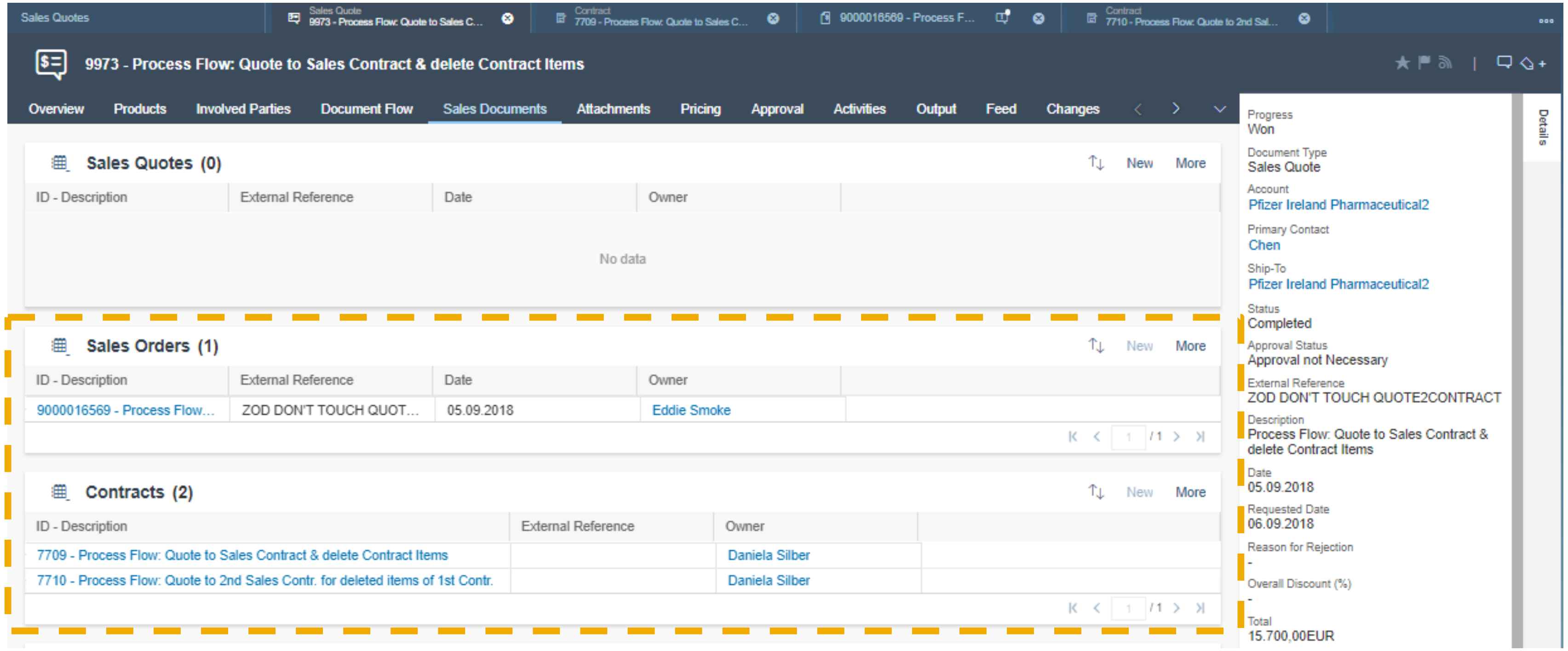
Topic Area: Sales Contract as Follow-Up to Quote # Basic Change Step 6



Set-up Details

- All Product Items in the Quote which are no more associated with items of an existing Sales Contract could be [re]-used for …
  - Sales Order Set-Up
  - Creation of a new [probably further] Sales Contract

Topic Area: Sales Contract as Follow-Up to Quote #3 Basic Change Step 7



Set-up Details

- Association of the Quote to Sales Orders and Contract is listed in Facet Sales Documents and in the relating Orders and Contracts

What’s New in Sales Quotes

What’s New in 1811 for Sales Quotes

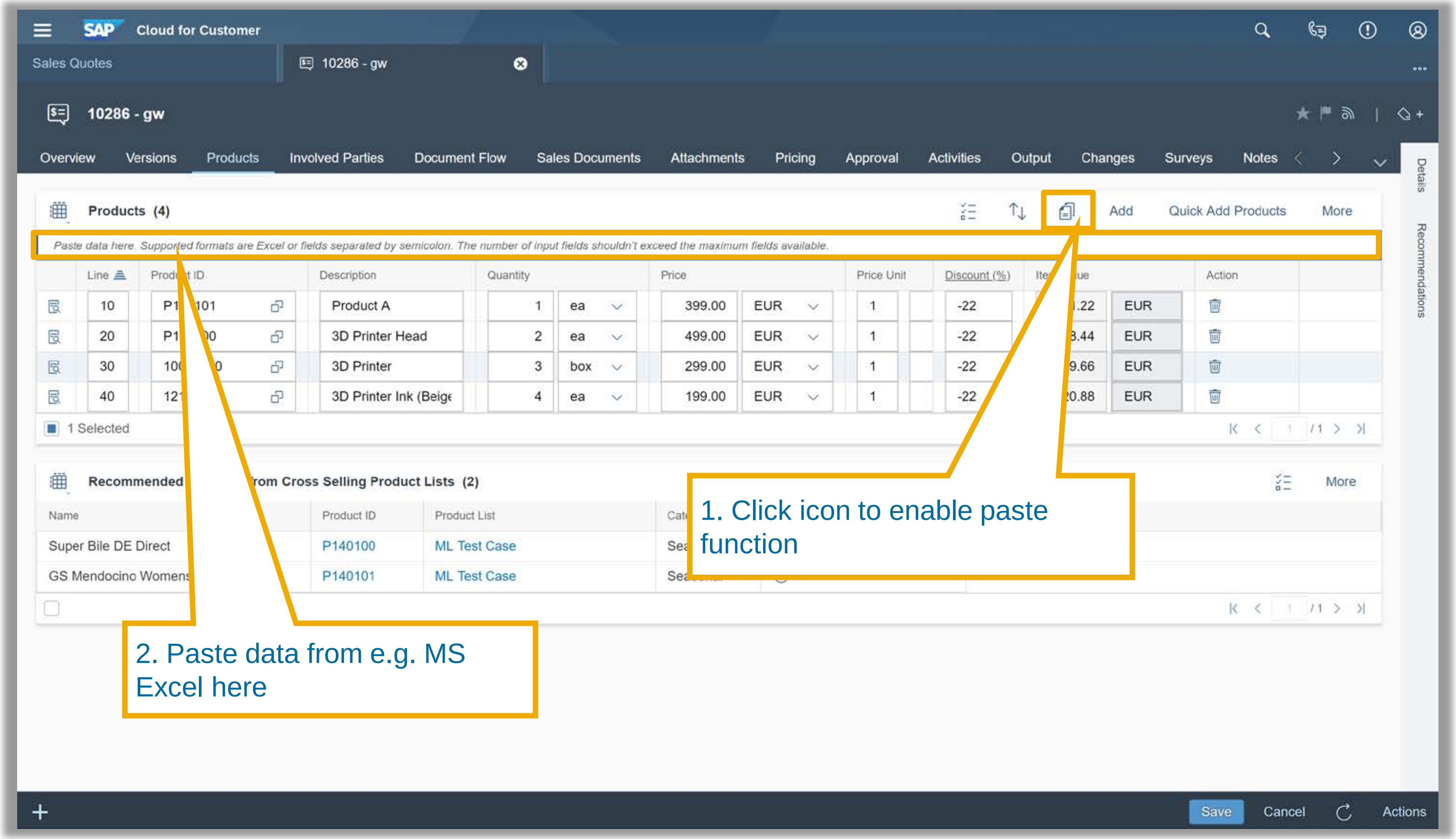
Key Innovations

- Mass Entry of Products via Copy & Paste
- Create Contract as a follow-on document from Sales Quote
- Show Item and Total Weight and Volume

Additional Enhancements

- Configurable Mandatory Check for Employee Responsible and Seller Party
- Addition of Attachments to Sales Quotes in Completed Status
- Show Sales Quote References in Registered Product/Installed base
- Enhanced Sales Quote Approval Conditions including Three External Price Elements
- Automatically Assign Tasks/Surveys from Activity Plans via Workflow
- Allow print of Sales Quote with bi-directional ERP integration
- Default Product Quantity to Zero
- Change Incoterms on Item Level
- Value Help Enhancements For Involved Parties

Sales Quote: Mass entry of Products via Copy & Paste



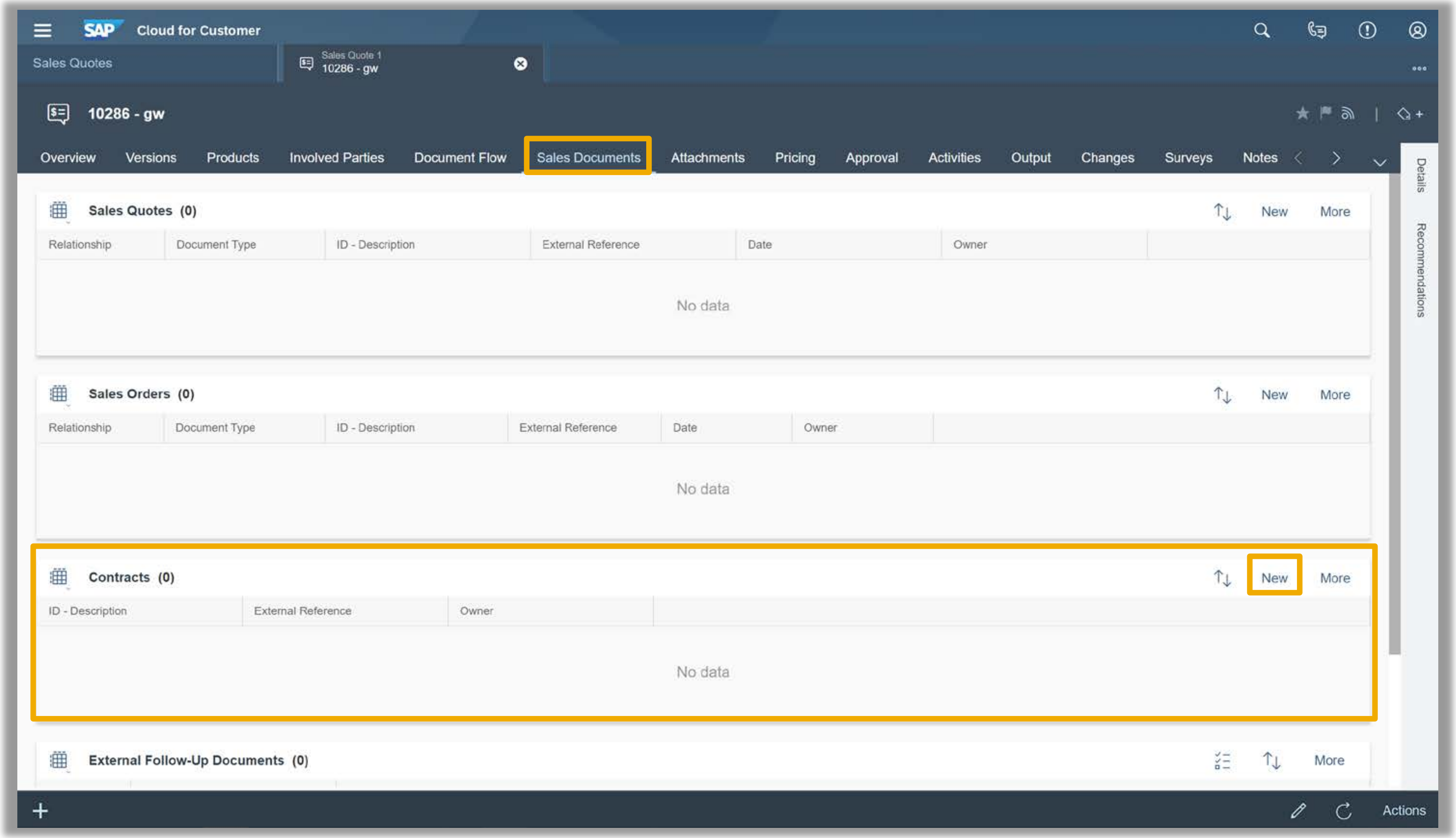
You can copy line items from MS Excel via copy & paste to the product table in order to quickly paste products to a sales quote.

Make sure that the copied data **exactly matches the order of columns** in the user interface, whereby combined fields represent two columns.

Note, that the number of input fields shouldn't exceed the maximum column fields exposed.

Referenced idea in Customer Influence: https://influence.sap.com/sap/ino/#/idea/208475

Sales Quote: Create Contract as a follow-on Document from Sales Quote

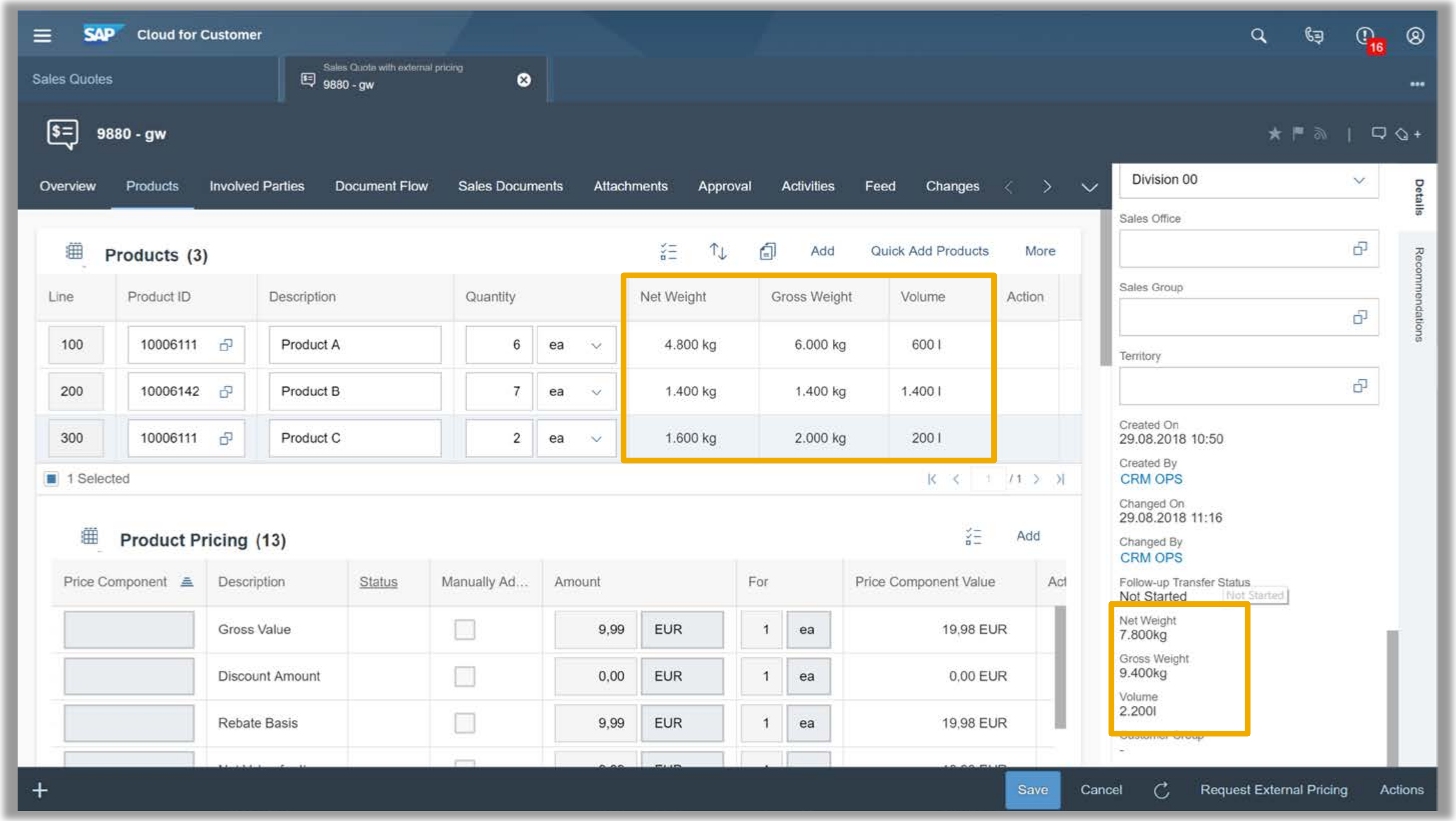


You can now create a sales contract document as a follow-on document from a sales quote.

If a follow-up contract item is created from a sales quote, the quote will convert to Won.

Add hidden section Contracts to Sales Documents facet. You can also add header quote field *Requested End Date*", that represent the contract validity together with field *Requested Date*.

Sales Quote: Show Item and Total Weight and Volume (1)

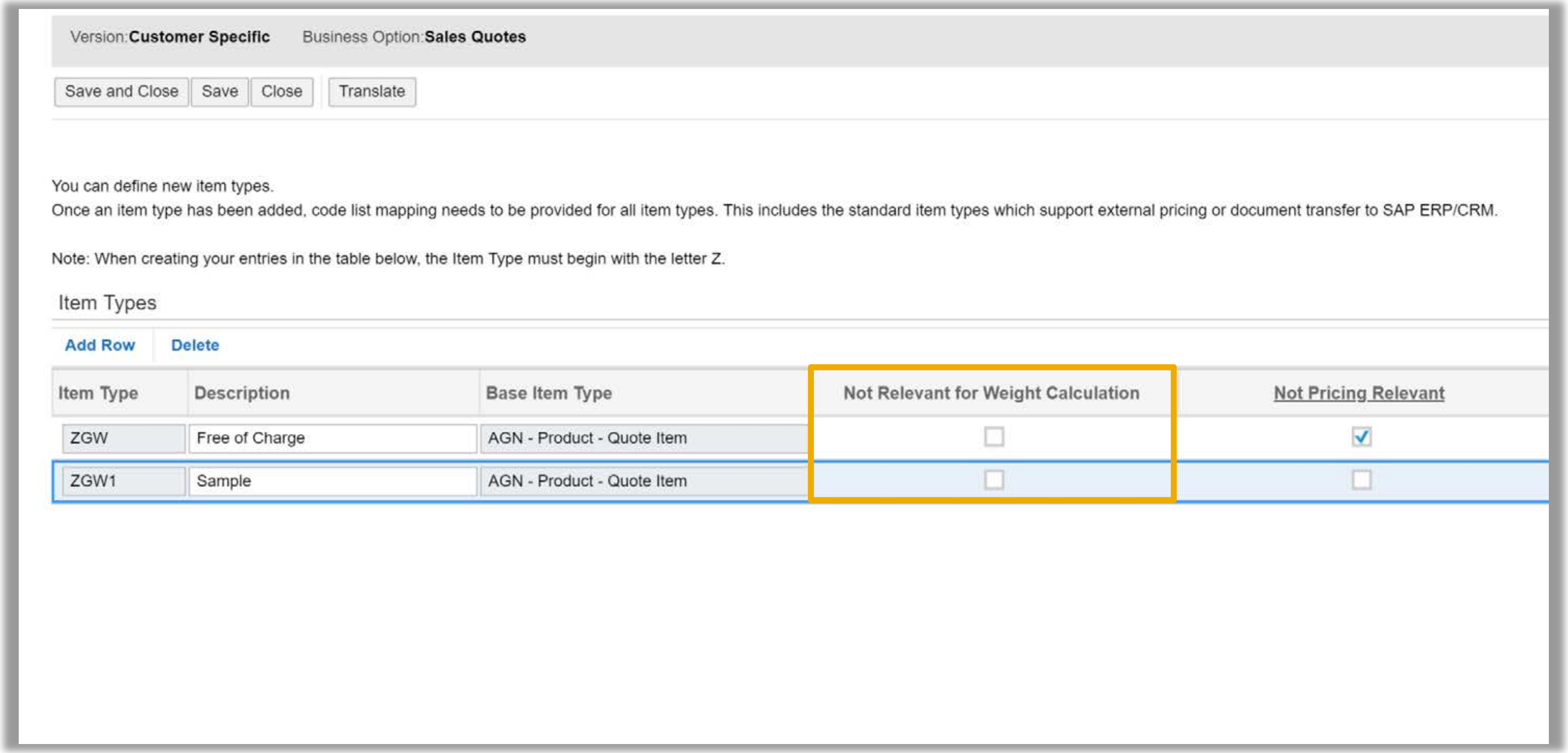


If product master contains net and gross **weight** and **volume** information, the data gets calculated in Sales Quotes.

Quotes using external pricing or bi-directional integration receive the data directly from SAP ECC.

Add hidden fields Net Weight, Gross Weight, or Volume on header and item.

Sales Quote: Show Item and Total Weight and Volume (2)



New fine-tuning activity configuration in Sales Quote -> Item Types

Column: **Not Relevant for Weight Calculation**: With this option you mark the item type as not relevant for weight (and volume) calculation. If the base item type is already not weight relevant this option is disabled. Make sure that corresponding SAP ERP customizing match.

What’s New in 1811 for Sales Quotes

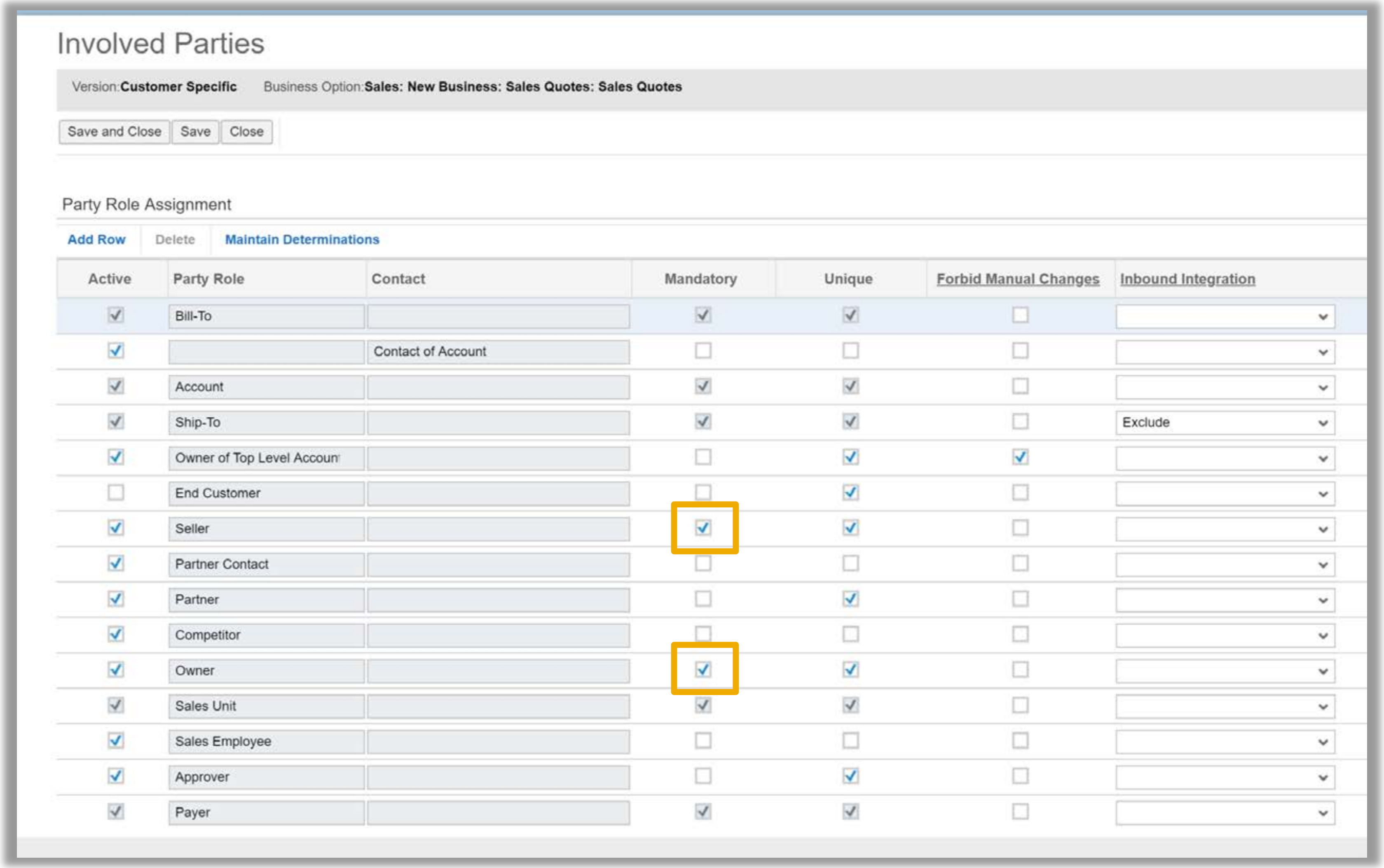
Key Innovations

- Mass Entry of Products via Copy & Paste
- Create Contract as a follow-on document from Sales Quote
- Show Item and Total Weight and Volume

Additional Enhancements

- Configurable Mandatory Check for Employee Responsible and Seller Party
- Addition of Attachments to Sales Quotes in Completed Status
- Show Sales Quote References in Registered Product/Installed base
- Enhanced Sales Quote Approval Conditions including Three External Price Elements
- Automatically Assign Tasks/Surveys from Activity Plans via Workflow
- Allow print of Sales Quote with bi-directional ERP integration
- Default Product Quantity to Zero
- Change Incoterms on Item Level
- Value Help Enhancements For Involved Parties

Sales Quote: Configurable Mandatory Check for Employee Responsible and Seller Party

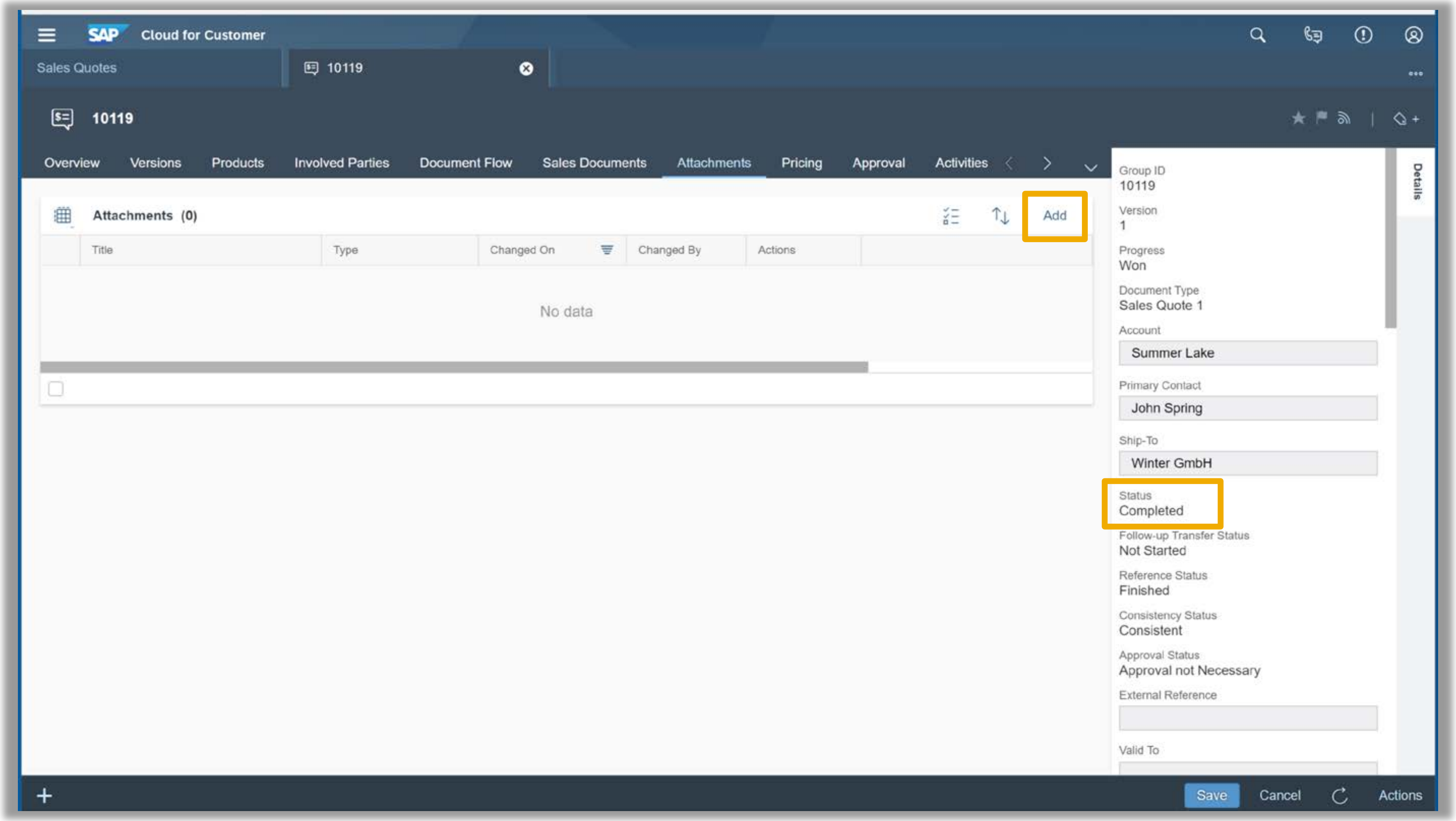


You can now disable the mandatory checks for party roles Employee Responsible (Owner) and Seller.

Fine-tuning activity configuration in Sales Quote -> Involved Parties

Referenced idea in Customer Influence: https://influence.sap.com/sap/ino/#/idea/214158

Sales Quote: Addition of Attachments to Sales Quotes in Completed Status

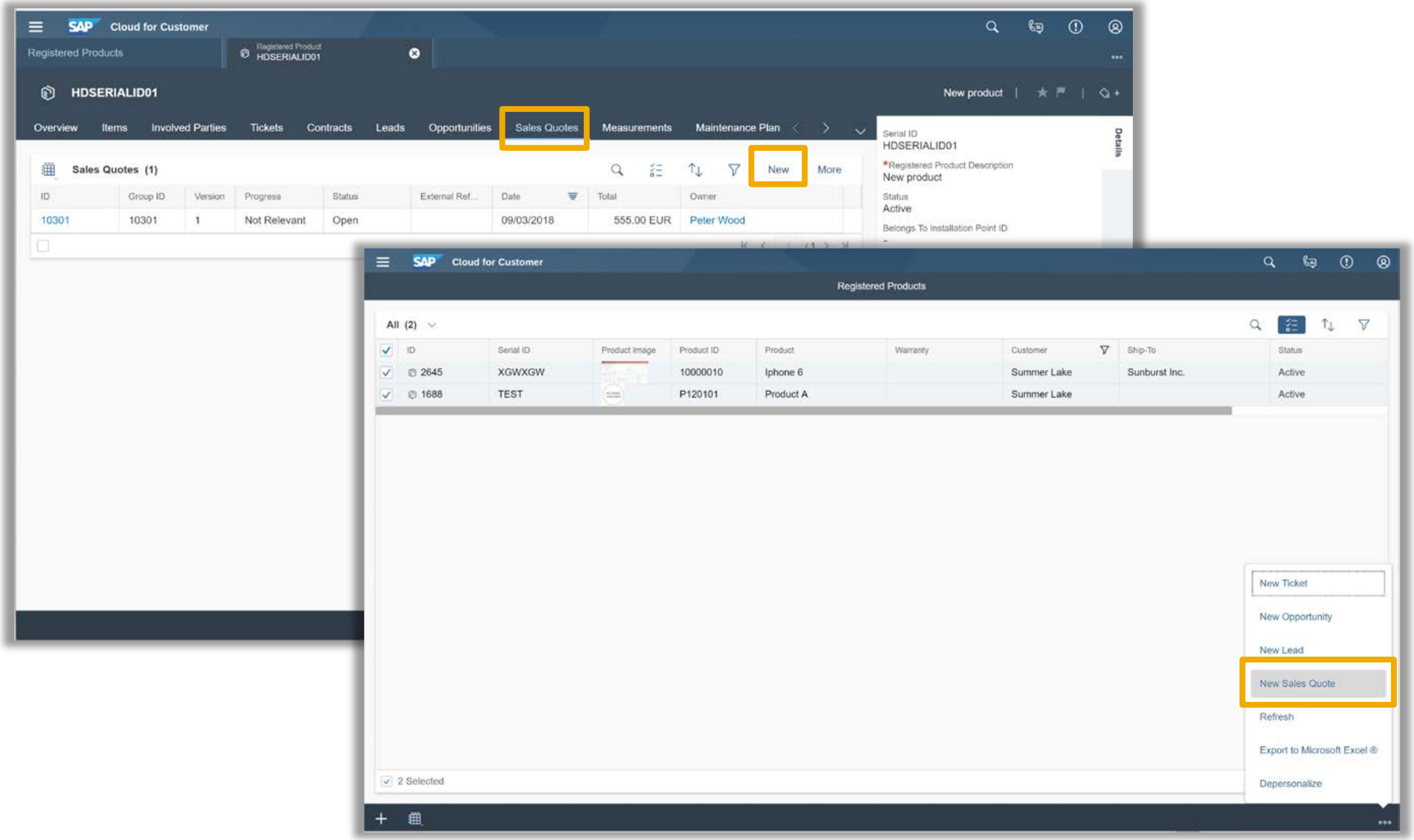


The addition of attachments to sales quotes in a completed status is now allowed (previously not permitted).

- Attachments can be added at the header and item level.

Referenced idea in Customer Influence: https://influence.sap.com/sap/ino/#/idea/132042

Sales Quote: Show Sales Quote References in Registered product

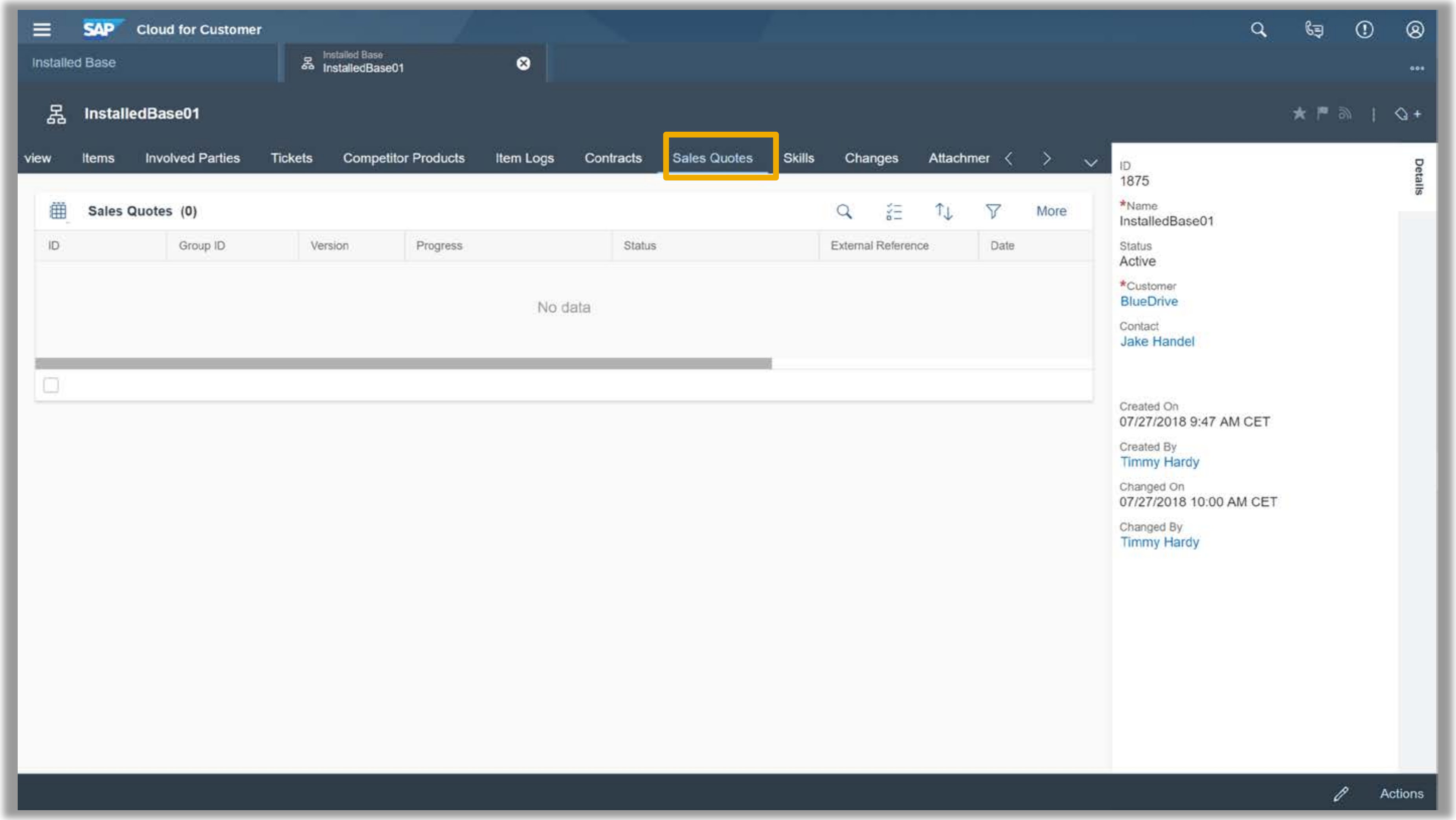


You can create or view sales quotes in the Registered Product workcenter.

You can directly create a new sales quote from the registered product worklist (multi select for same account supported).

Referenced idea in Customer Influence: https://influence.sap.com/sap/ino/#/idea/210655

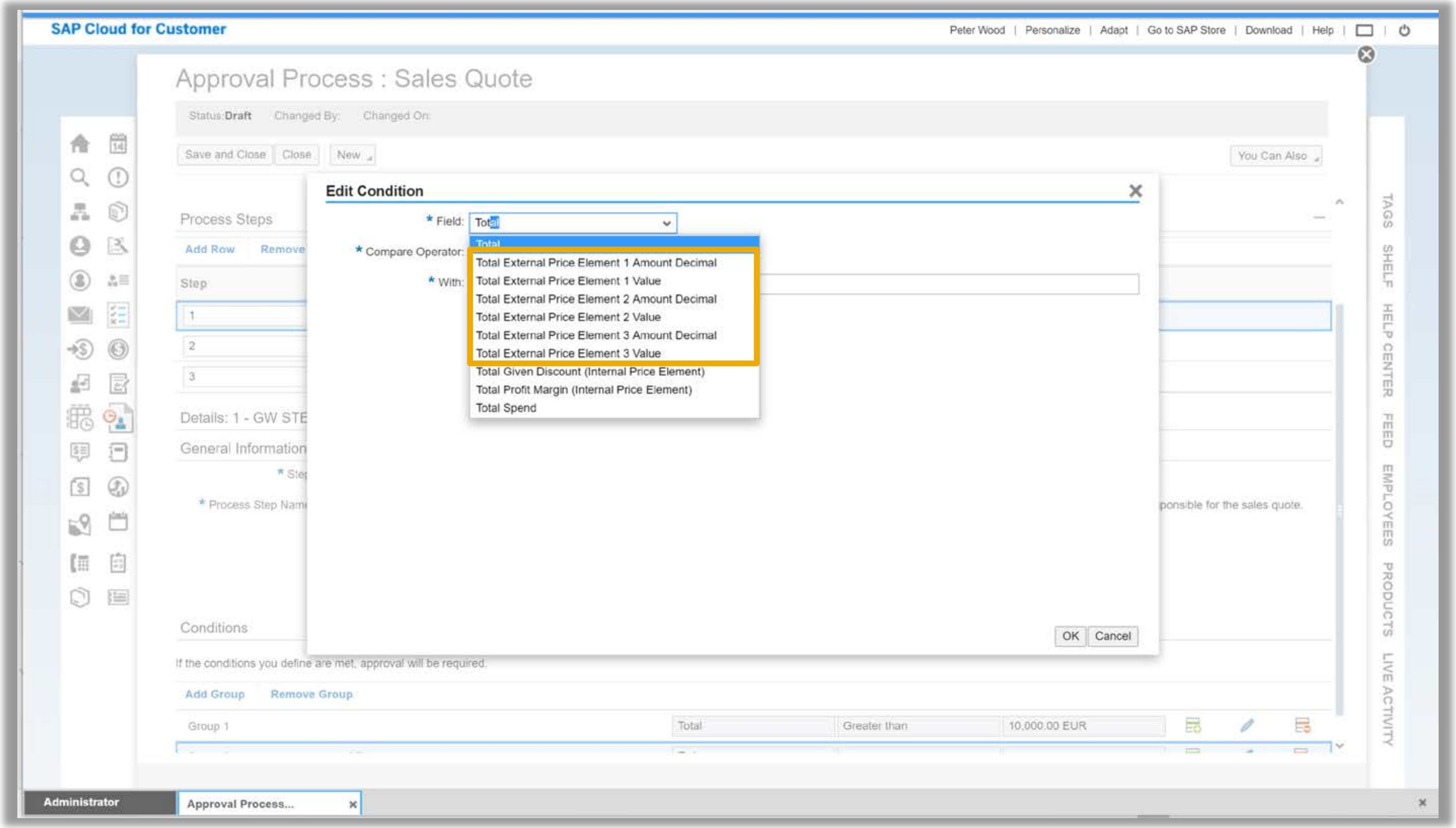
Sales Quote: Show Sales Quote References in Installed base



You can now display referenced sales quotes from the Installed Base view.

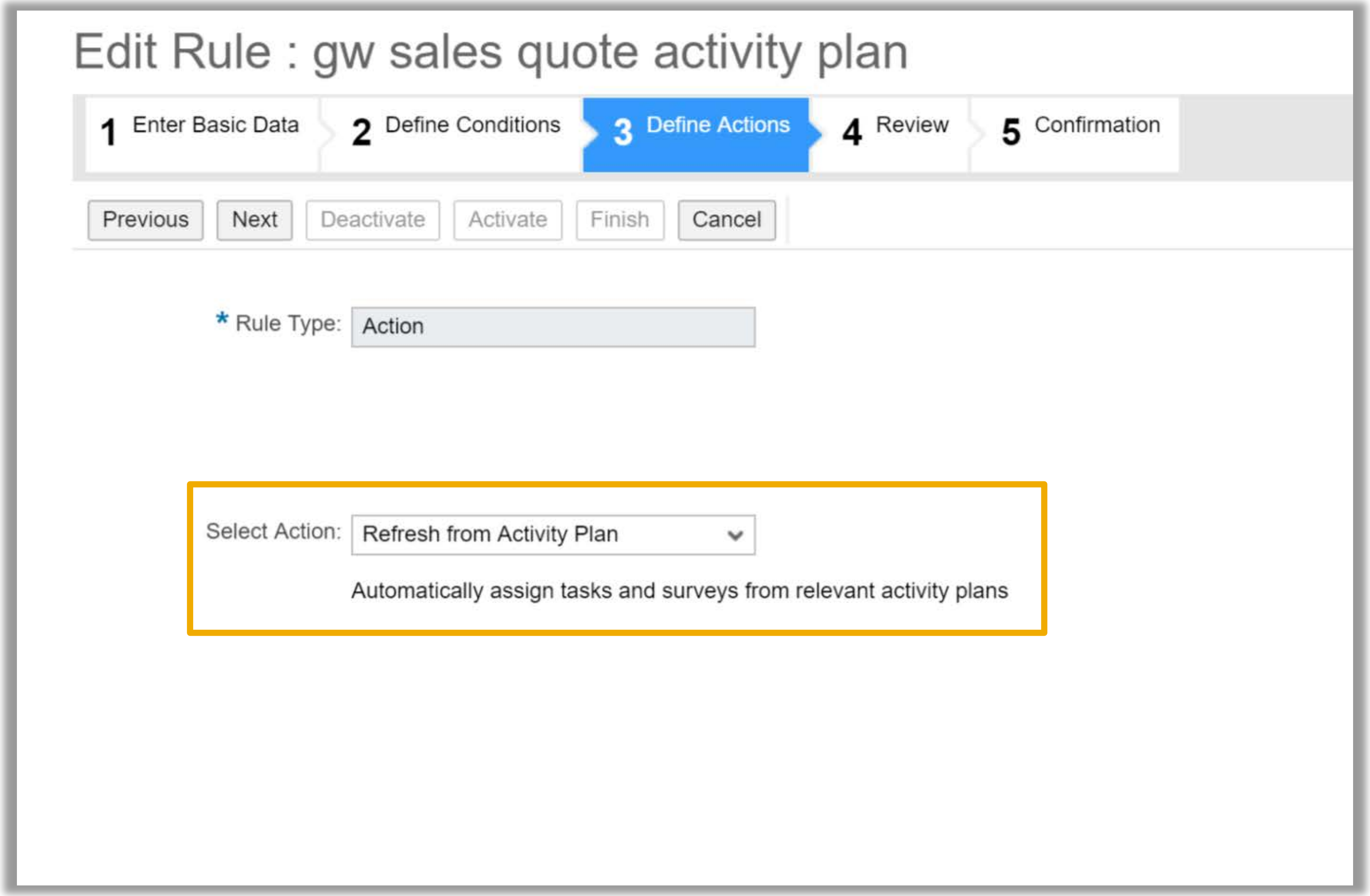
Referenced idea in Customer Influence: https://influence.sap.com/sap/ino/#/idea/210655

Sales Quote: Enhanced Sales Quote Approval Conditions including External Price Elements



You can now use any of three ‘Total External Pricing Elements’, which can be mapped to the standard UI fields, as approval conditions in the sales quote approval process.

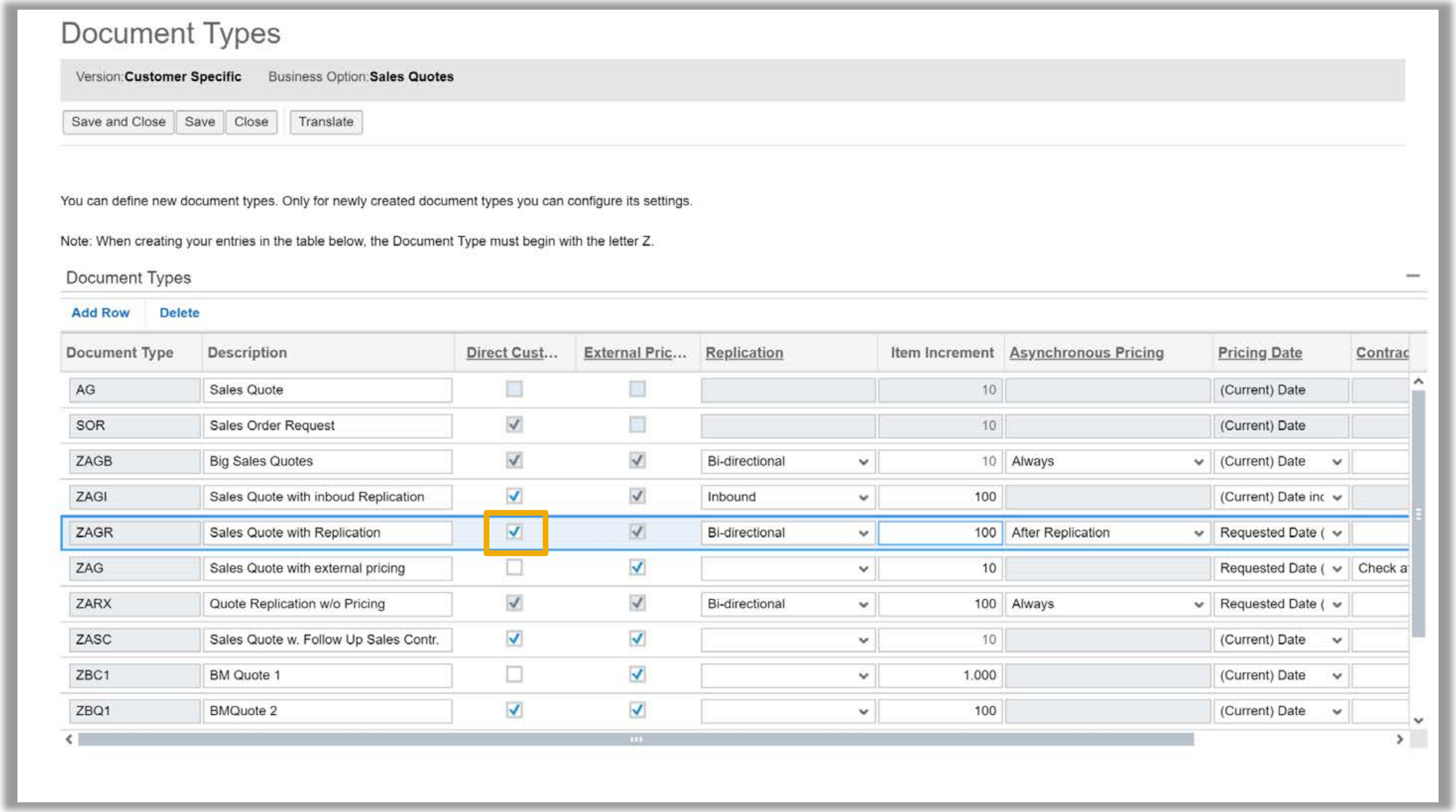
Sales Quote: Automatically Assign Tasks/Surveys From Activity Plans Via Workflow



You can now automatically assign surveys and task to a sales quote from an Activity Plan using Workflow Rules.

Referenced idea in Customer Influence: https://influence.sap.com/sap/ino/#/idea/145340

Sales Quote: Allow Print of Sales Quote with bi-directional ERP integration



Document Types

Version: **Customer Specific** Business Option: **Sales Quotes**

Save and Close | Save | Close | Translate

You can define new document types. Only for newly created document types you can configure its settings.

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

Document Types

Add Row Delete

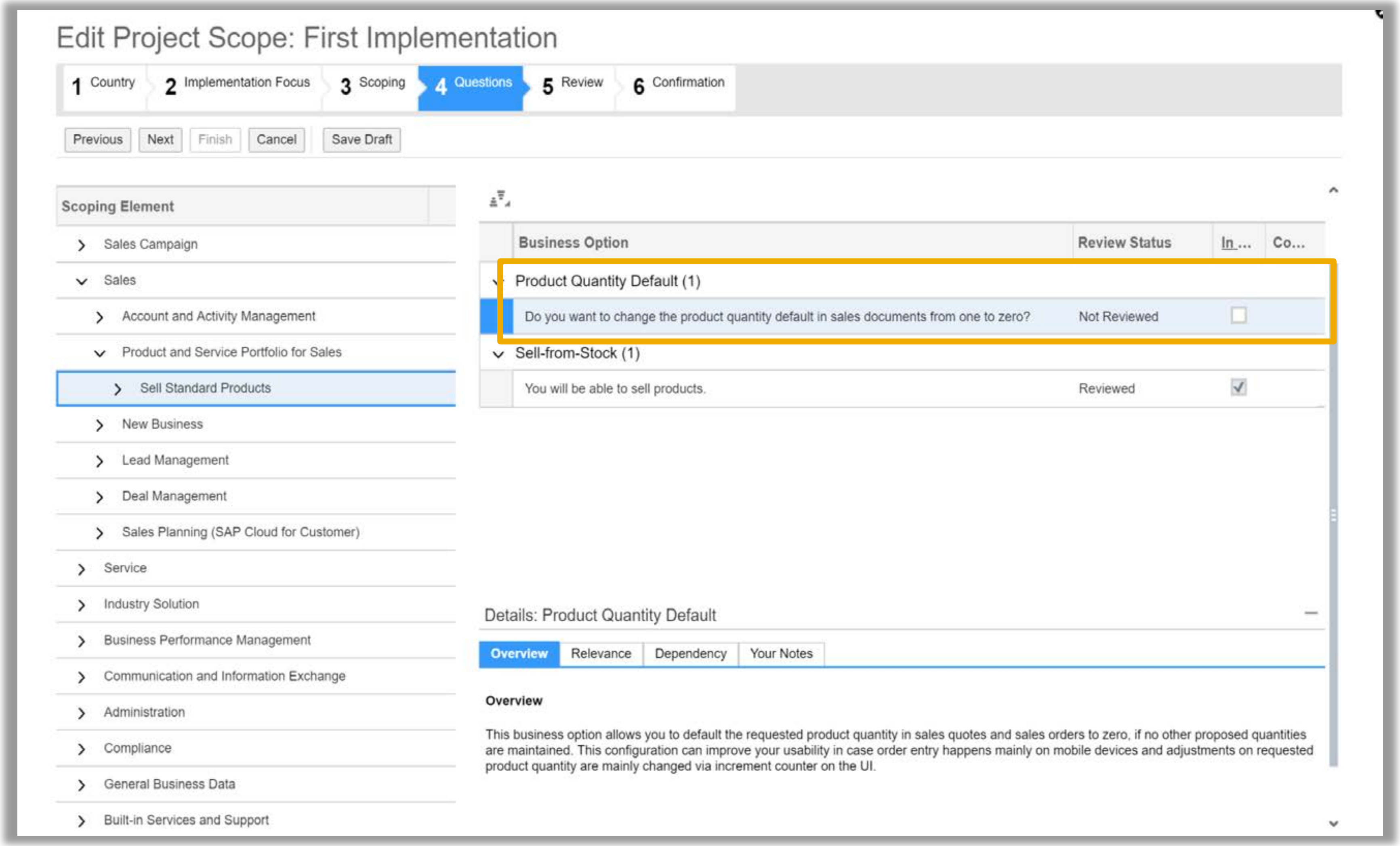
Document Type	Description	Direct Cust...	External Pric...	Replication	Item Increment	Asynchronous Pricing	Pricing Date	Contrac
AG	Sales Quote	☐	☐		10		(Current) Date	
SOR	Sales Order Request	☑	☐		10		(Current) Date	
ZAGB	Big Sales Quotes	☑	☑	Bi-directional	10	Always	(Current) Date	
ZAGI	Sales Quote with inboud Replication	☑	☑	Inbound	100		(Current) Date inc	
ZAGR	Sales Quote with Replication	☑	☑	Bi-directional	100	After Replication	Requested Date (	
ZAG	Sales Quote with external pricing	☐	☑		10		Requested Date (	Check a
ZARX	Quote Replication w/o Pricing	☑	☑	Bi-directional	100	Always	Requested Date (	
ZASC	Sales Quote w. Follow Up Sales Contr.	☑	☑		10		(Current) Date	
ZBC1	BM Quote 1	☐	☑		1.000		(Current) Date	
ZBQ1	BMQuote 2	☑	☑		100		(Current) Date	

Fine-tuning activity Sales Quotes- > Document Types

You can now enable the sales quote output submission for sales quotes with bi-directional integration.

Note, the configuration is not enabled for quotes with asynchronous pricing in general.

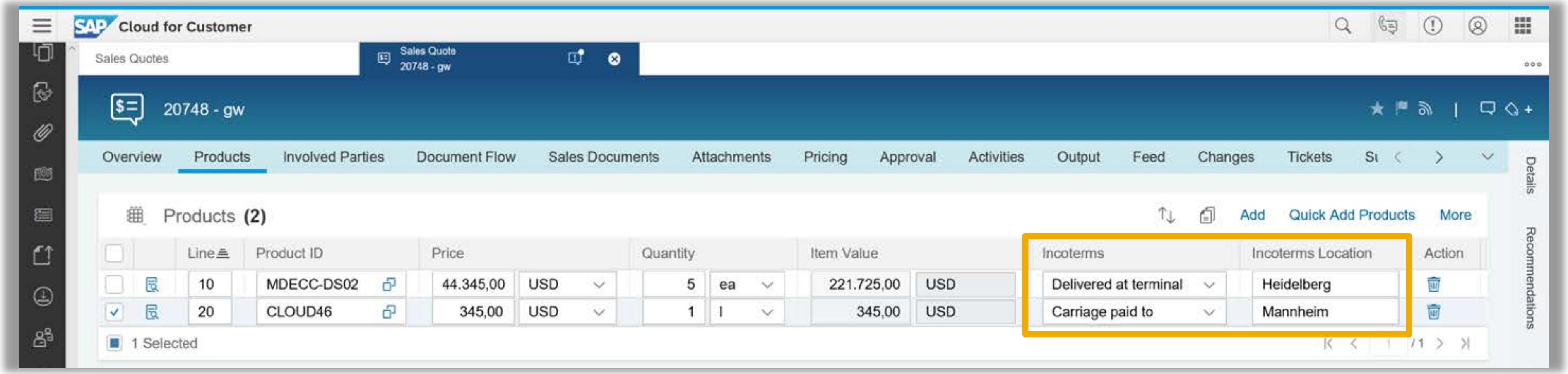
Sales Quote: Default Product Quantity to Zero



You can now configure the defaulting of the product quantity to ‘0’ instead of ‘1’.

- This business option allows you to default the requested product quantity in sales quotes and sales orders to zero, if no other proposed quantities are maintained.
- This configuration can improve your usability in case order entry happens mainly on mobile devices and adjustments on requested product quantity are mainly changed via increment counter on the UI.

Sales Quote: Change Incoterms on Item Level

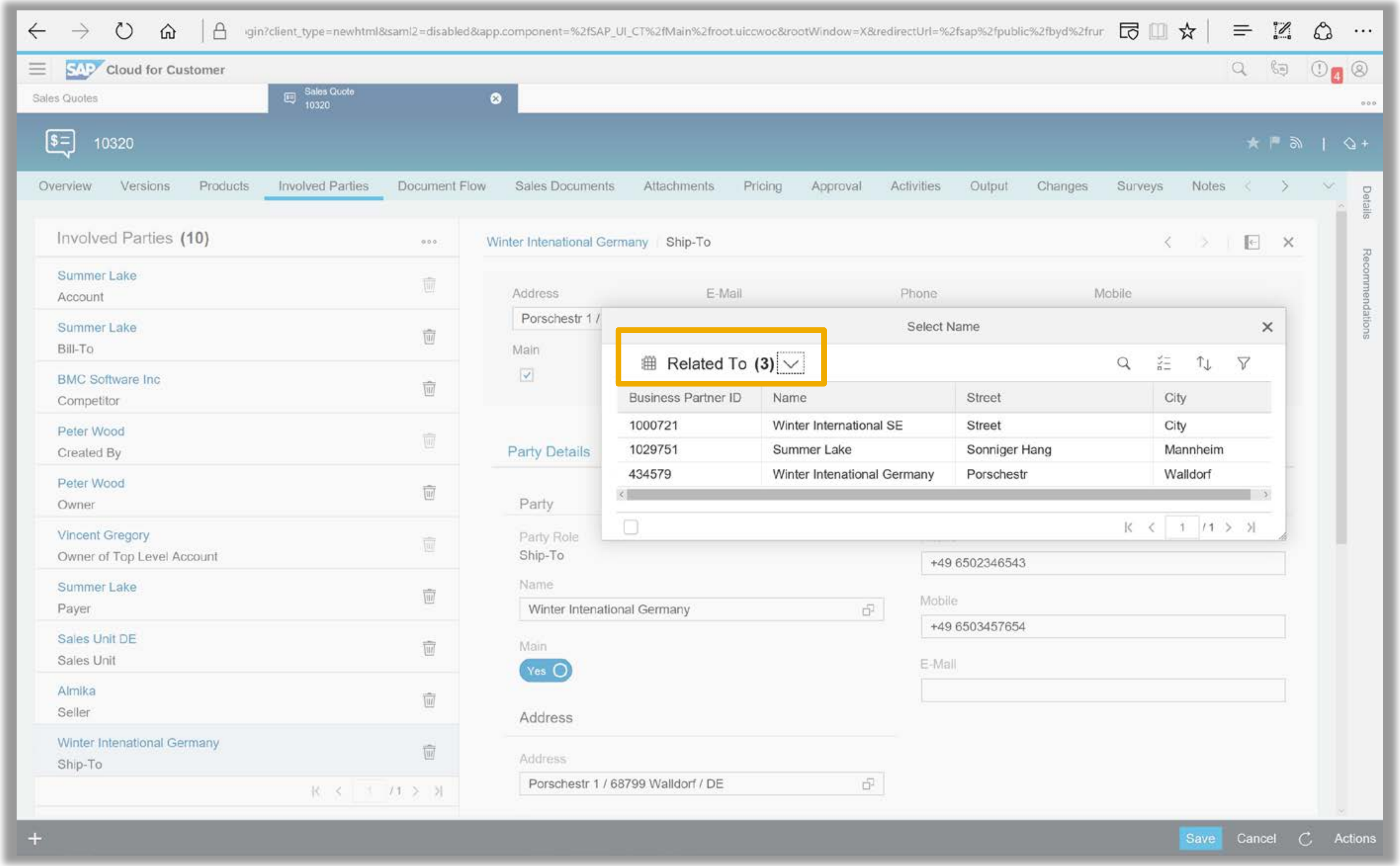


You can now assign different Incoterms on item level. In general Incoterms are copied by default from the sales quote header to the items.

Add hidden fields Incoterms and Incoterms Location via Adaptation to the Product table.

Referenced idea in Customer Influence: https://influence.sap.com/sap/ino/#/idea/208315/

Sales Quote: Value Help Enhancements for Involved Parties (1)

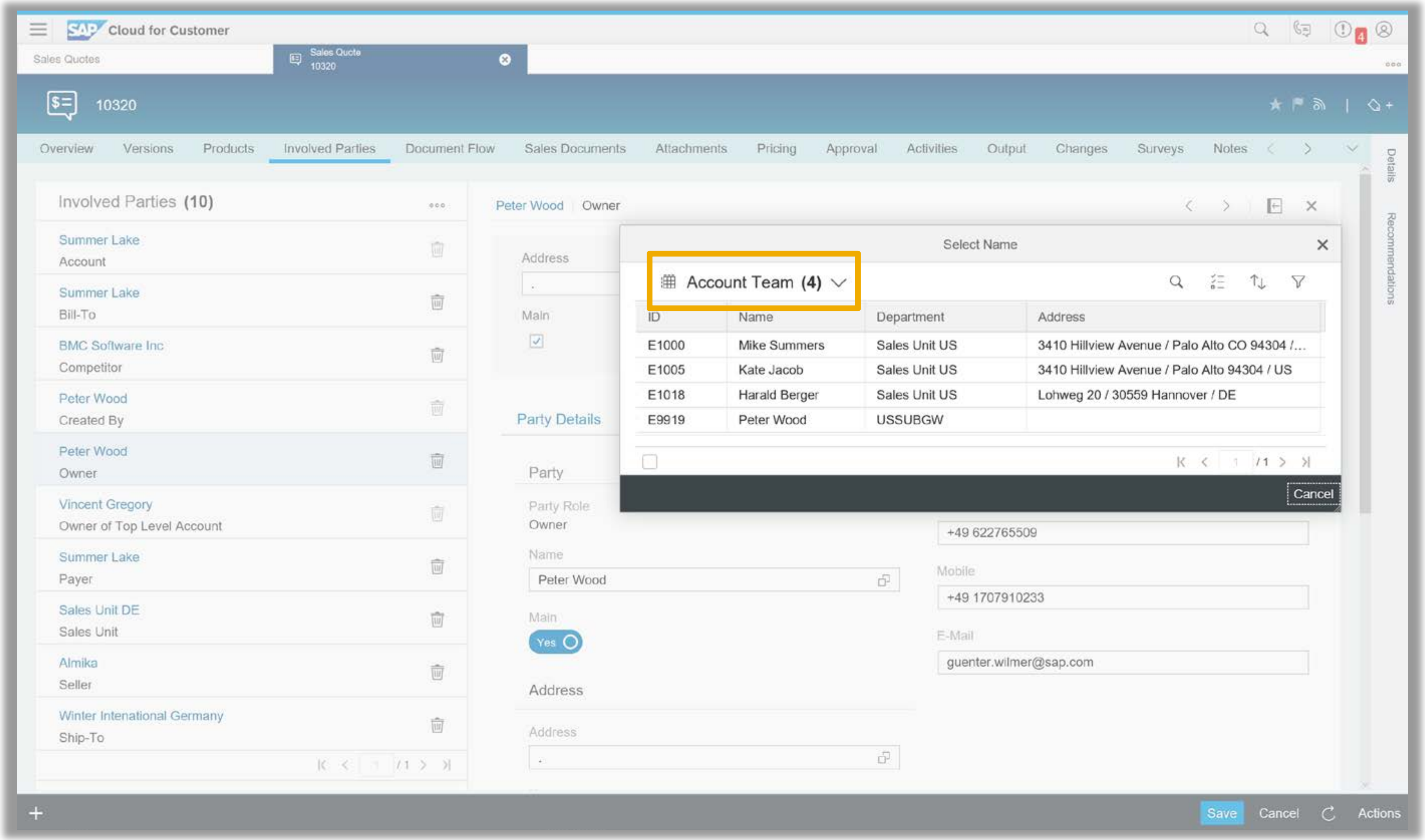


You can now query involved parties in the **generic business partners value help** the relationships of the account in the sales quote using new query **Related To**.

This is in particular helpful for Ship-To, Bill-To, or Payer selections in the involved parties tab (both header and item).

Referenced idea in Customer Influence: https://influence.sap.com/sap/ino/#/idea/143081

Sales Quote: Value Help Enhancements for Involved Parties (2)



You can now query employees in the **generic employee value help** belonging to the account team of the account in the sales quote using new query **Account Team.**

This is in particular helpful if you want to add additional employees from the account team as involved party to the sales quote.

What’s New in Sales Order

What’s New in 1811 for Sales Order

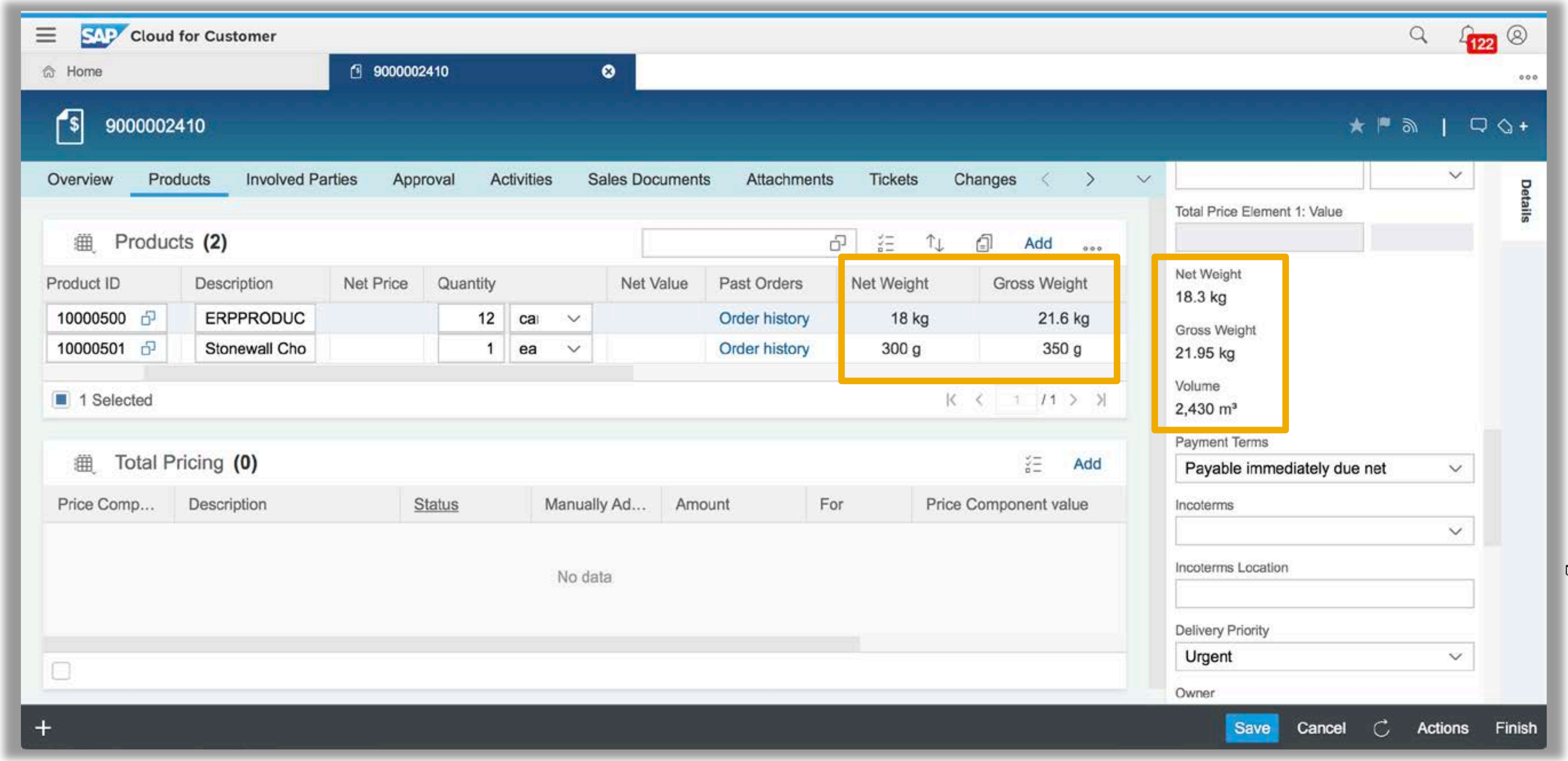
Key Innovations

- Total Order Weight Aggregation based on Item Weights - Online and Offline
- Item Insights Enhanced for Past Order History - Online and Offline
- Support for Extension Fields in Offline Price Calculation
- Mass Entry of Products via Copy & Paste from MS Excel

Additional Enhancements

- Default Product Quantity to Zero
- Search and Add Text Box
- Offline Pricing Status Adoption
- Incoterms at Item Level
- Value Help Enhancement - New “Related To” Query
- Individual Customer Support in Order Workflow
- Offline Determination of Payer and Bill-to Party
- Support of Additional Fields for Pricing (Bill-To; Payer)

Sales Order: Item Weights & Total Order Weight



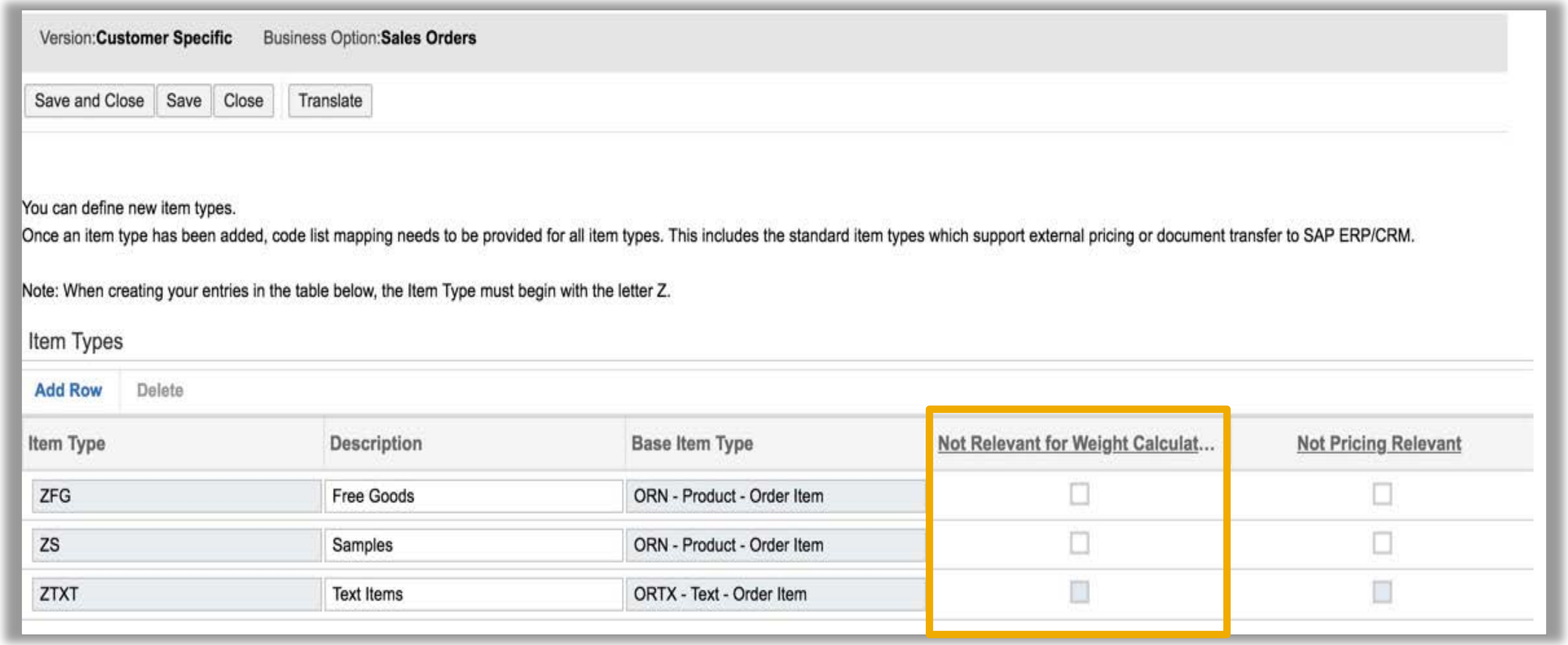
You can maintain the product Net & Gross weight in product master data**.**
This product weight information is used to calculated order **Item Weight** and **Total Order weight**.

- Weight calculation is available for both online and offline modes.
- On **simulation** the data is updated based on ERP Calculation.
- data directly from SAP ECC.

Set-up Details

- Add the hidden fields ‘Net Weight’, ‘Gross Weight’, or ‘Volume’ on header and item through adaptation.

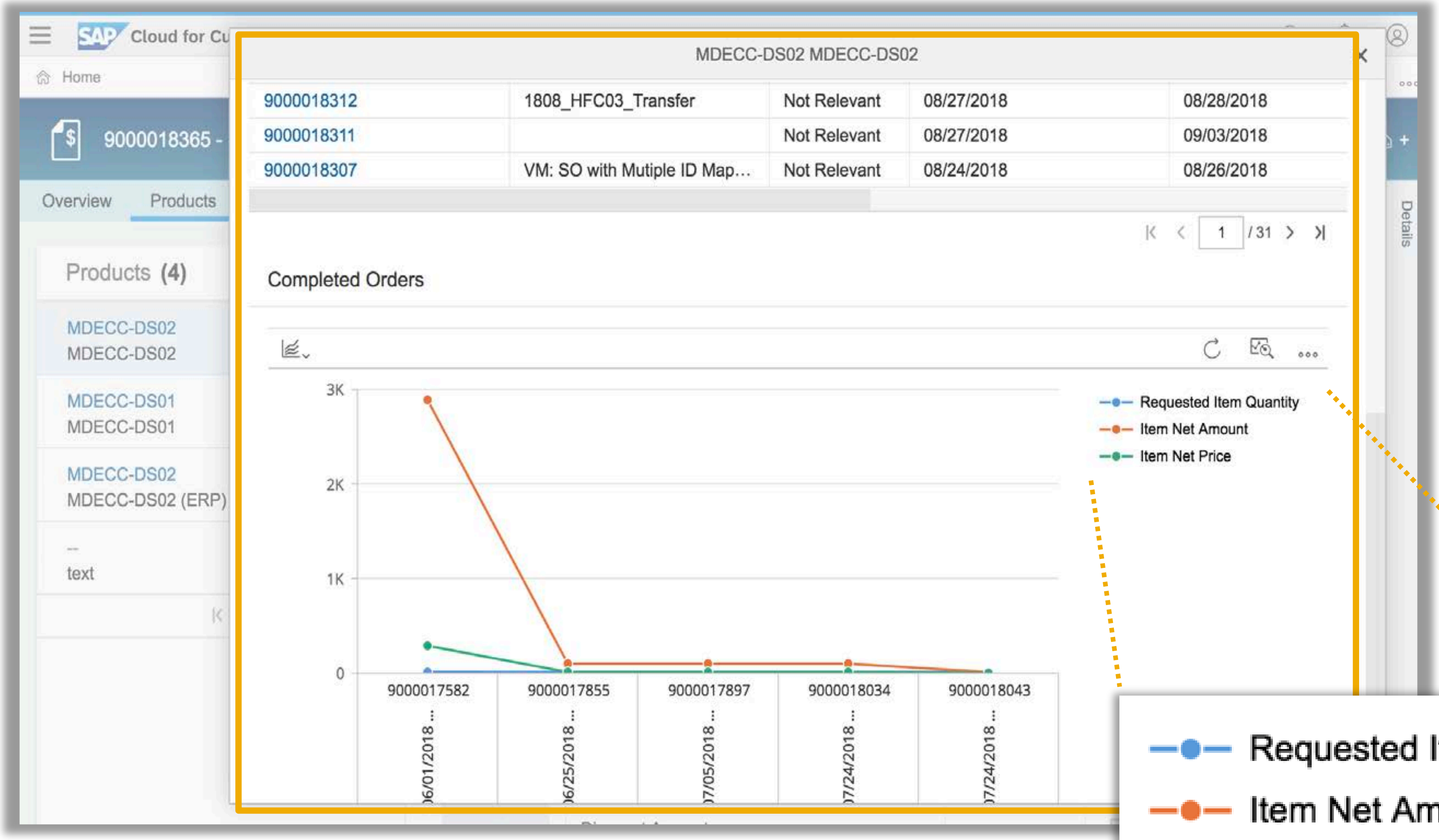
Sales Order: Items Not Relevant for Weight Calculation

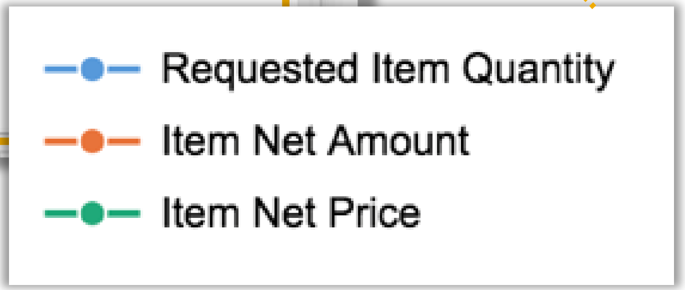


You can exclude selected Item Types from the new weight calculation capability.

- New fine-tuning activity configuration in Sales Order -> Item Types
- Use the column: **Not Relevant for Weight Calculation**: You can mark the item type as not relevant for weight (and volume) calculation. If the base item type is already not weight relevant this option is disabled. Make sure that corresponding SAP ERP customizing matches.
- This is mainly used in case you want to exclude the free goods from weight aggregation.

Sales Order: Item Insights Enhanced for Past Order History

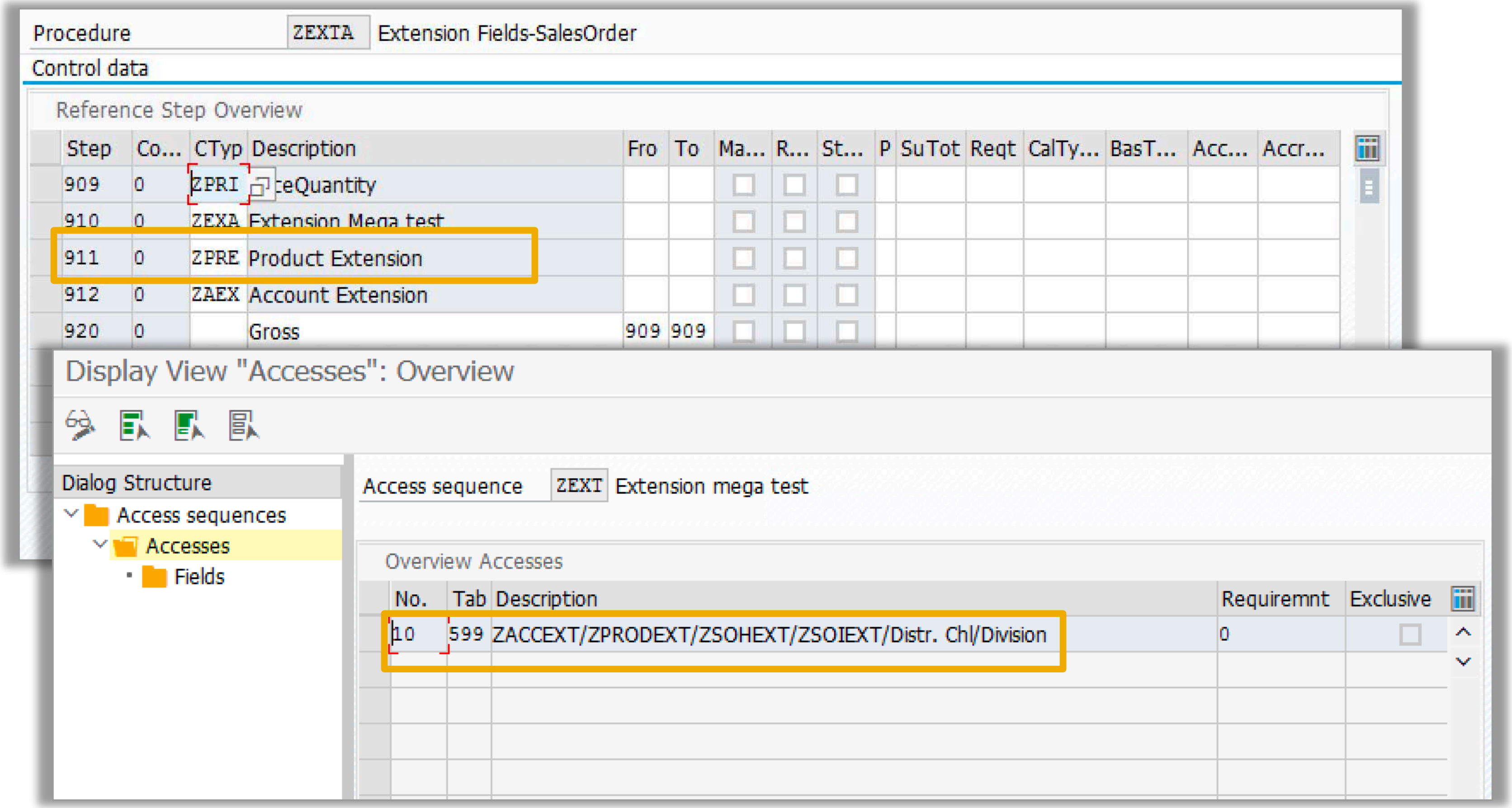




The past order column in the order item, now displays past orders in a table and chart format.

- The historical completed orders containing that product type are shown chronologically in the table and chart.
- In offline we get to see the table listing the past order where this product has been ordered.
- The Y axis is depicted generically in 1000 unit increments

Sales Order: Support of Extension or ‘Z’ fields for Flexible Offline Price Calculation



You can now use the extension fields or ‘Z’ fields in SAP ERP mapped to extension fields in C4C, to calculate prices offline mode.

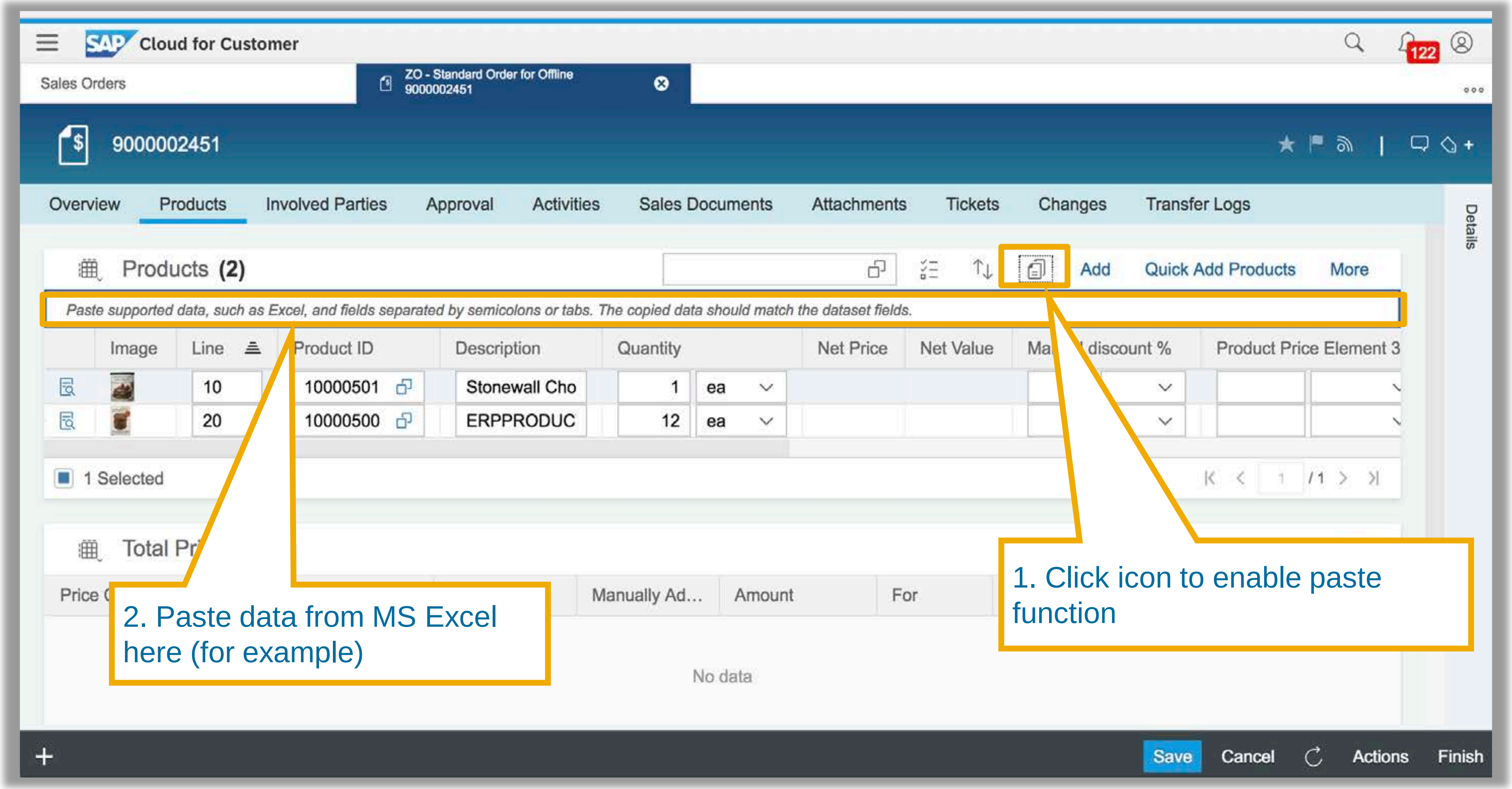
Steps:

- Map the Z-fields of ERP to the extension fields in C4C
- Upload Procedure with Z-fields
- Transfer Price master data for the required condition tables
- Define the procedure determining rules
- Sync data for offline and use

Mandatory Note:

- Do not delete the extension fields used in Offline Pricing Calculation - as this causes Database inconsistency

Sales Order: Mass entry of Products via Copy & Paste from MS Excel



Sales Order RUI (in Fiori Client) supports adding items from MS Excel via copy & paste to the product table in order to add multiple products at once.

- Ensure that the copied data **exactly matches the order of columns** in the user interface, whereby combined fields represent two columns.
- Note, that the number of input fields shouldn't exceed the maximum column fields exposed.

Referenced Customer Influence idea:
https://influence.sap.com/sap/ino/#/idea/208475

What’s New in 1811 for Sales Order

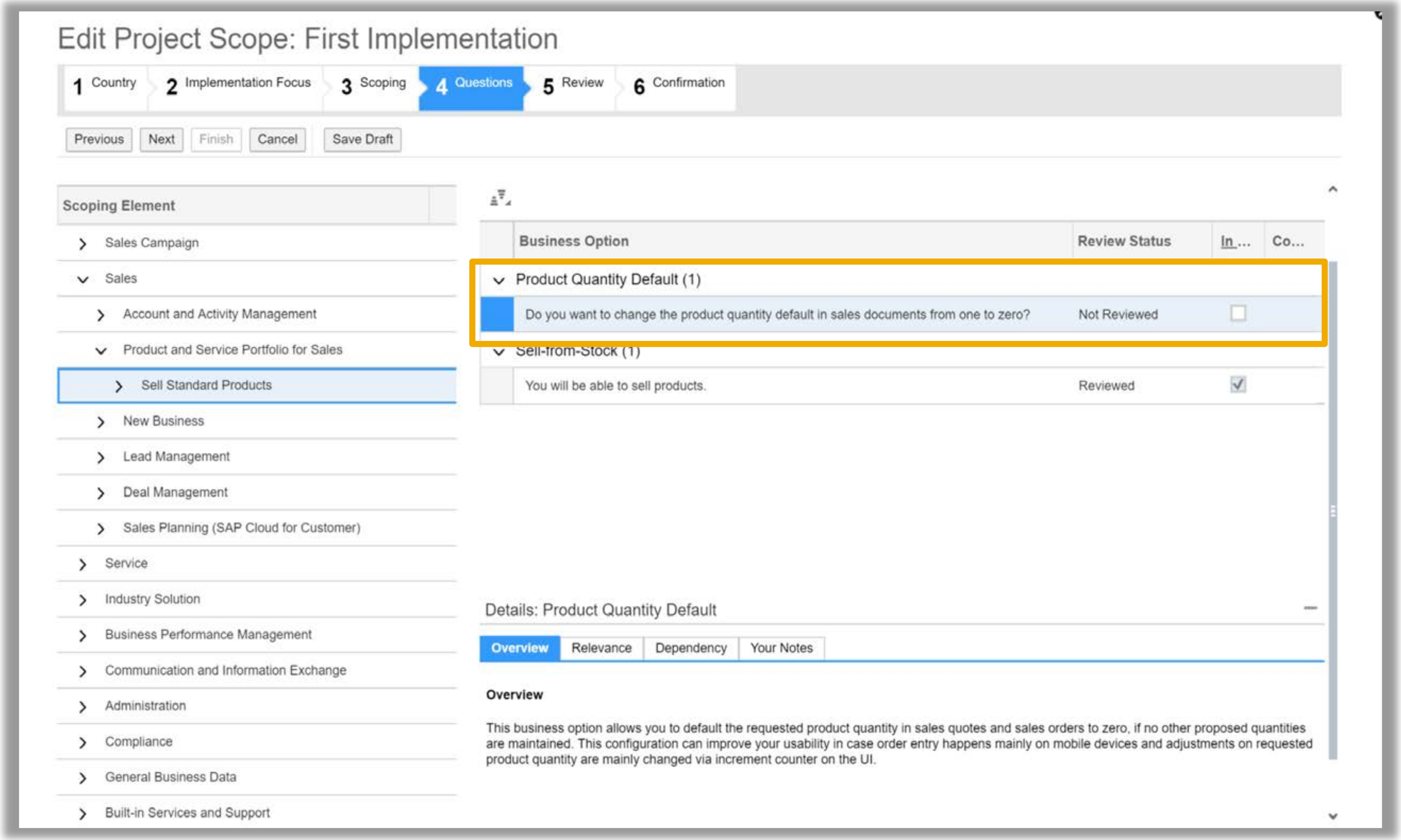
Key Innovations

- Total Order Weight Aggregation based on Item Weights - Online and Offline
- Item Insights Enhanced for Past Order History - Online and Offline
- Support for Extension Fields in Offline Price Calculation
- Mass Entry of Products via Copy & Paste from MS Excel

Additional Enhancements

- Default Product Quantity to Zero
- Search and Add Text Box
- Offline Pricing Status Adoption
- Incoterms at Item Level
- Value Help Enhancement - New “Related To” Query
- Individual Customer Support in Order Workflow
- Offline Determination of Payer and Bill-to Party
- Support of Additional Fields for Pricing (Bill-To; Payer)

Sales Order: Default product quantity to zero



You now have the option to default the product quantity to ‘0’ instead of ‘1’.

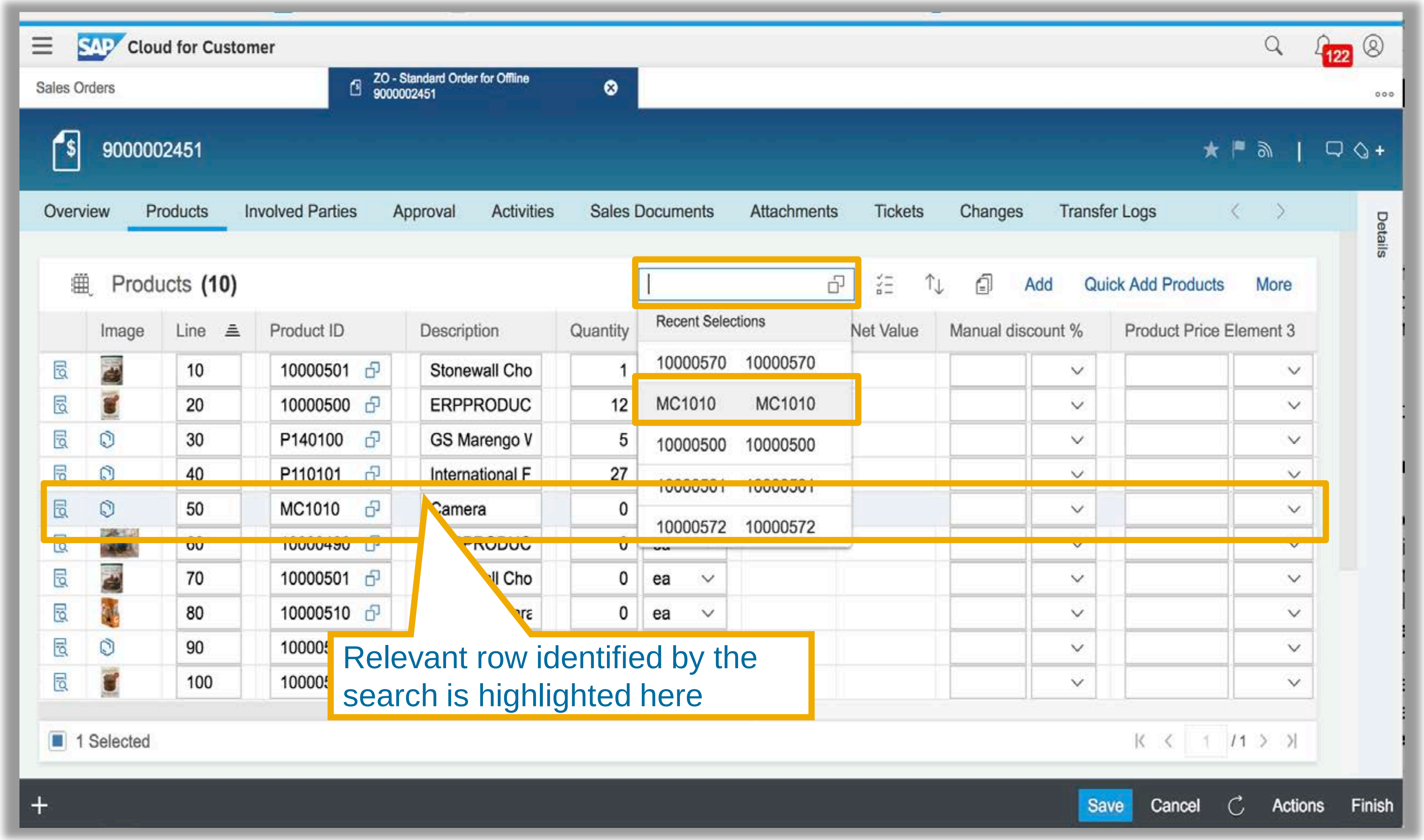
- This business option allows you to default the requested product quantity in sales quotes and sales orders to zero, if no other proposed quantities are maintained.

- This configuration can improve your usability in case order entry happens mainly on mobile devices and adjustments on requested product quantity are mainly changed via increment counter on the UI.

Set-up Details

- Use the Scoping item under ‘Set Standard Products’
- Business option name is ‘Product Quantity Default’, question: ‘Do you want to change the product quantity default in sales documents from one to zero?

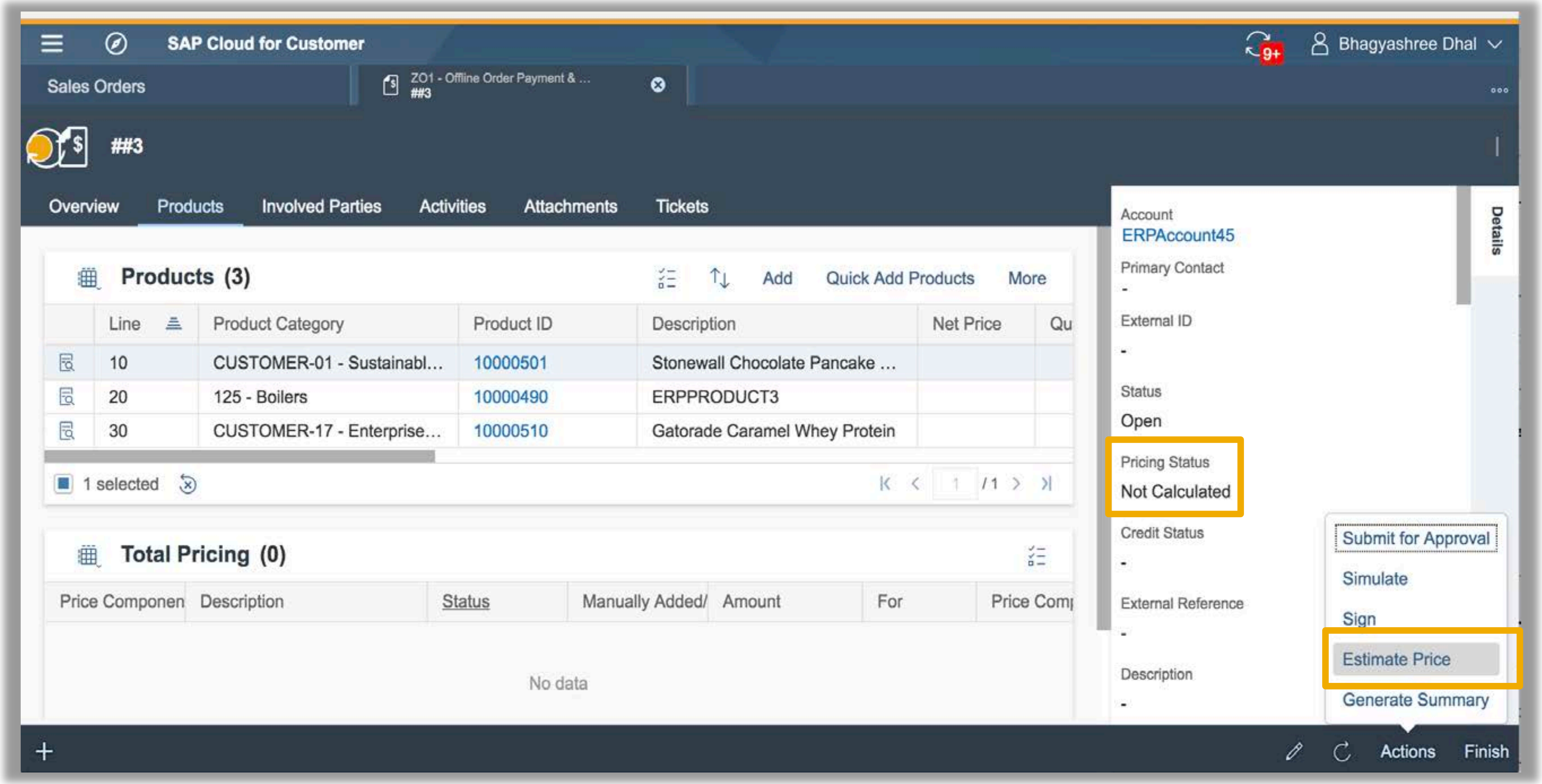
Sales Order: Search & Add Text Box



You can now use a ‘Search & Add’ text box feature that has been added to the product table in in the Sales order under the Product Facet.

- This feature enables you to search new products quickly, and add them directly to table below.
- If the searched product is present in the table below, the relevant row or field is get highlighted as shown.
- If the searched product is not present, it will be added automatically.
- In the event that the relevant products are on different pages, they will be highlighted as part of the search
- The Fast order entry text box is also enhanced with the same feature.

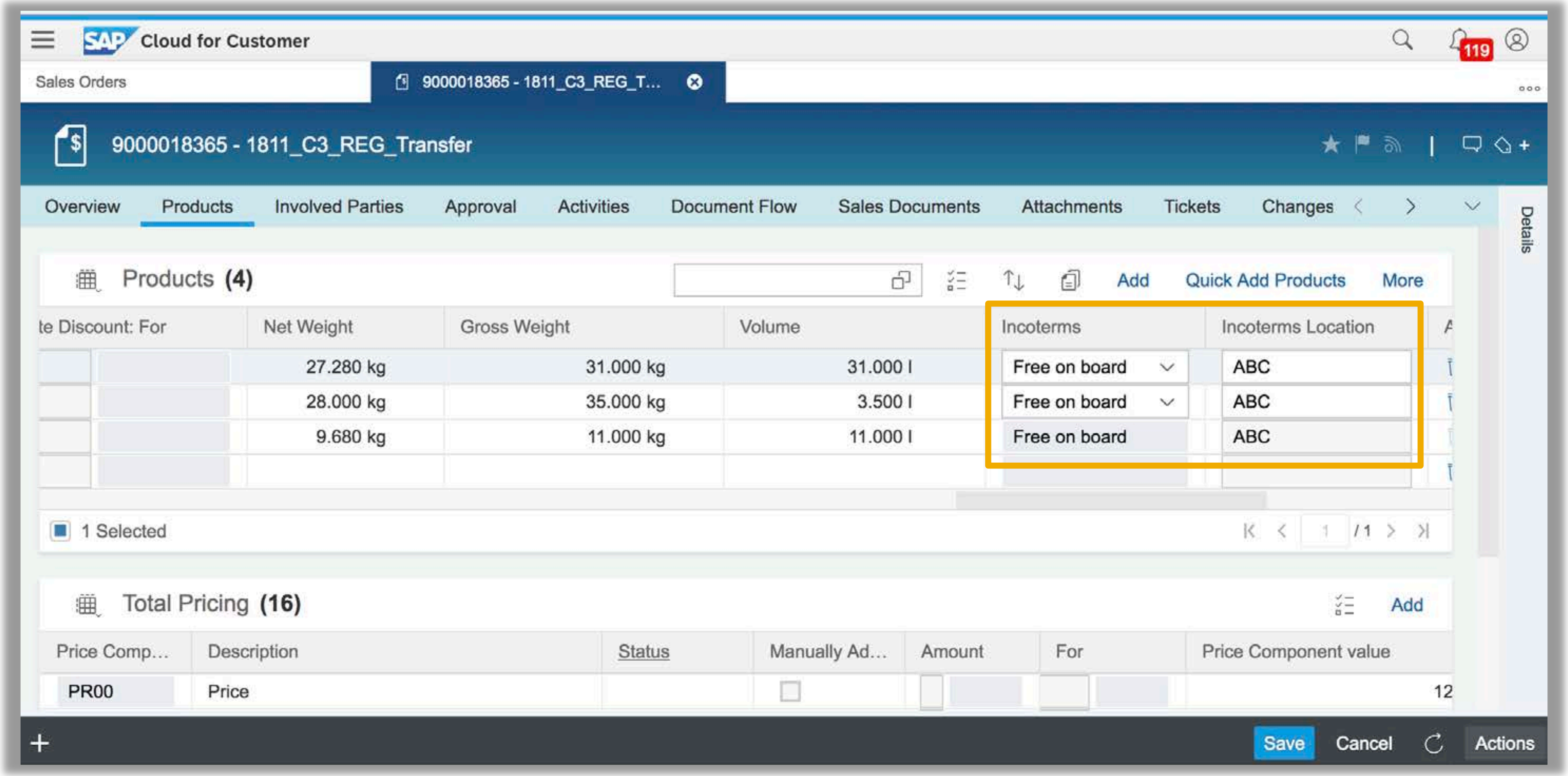
Sales Order: Pricing Status in Offline



You can now ensure that the offline price is calculated based on the latest changes of the data by a new action "Estimate Price"

- Once price is Estimated – the pricing status gets updated to **"Calculated Successfully**" and the **Estimate Price** action is then disabled
- You are able to make further changes to fields influencing Pricing, on pressing Enter, or by triggering a round trip the **pricing status** will change to **"Not Calculated"** and **Estimate Price a**ction gets **Enabled**

Sales Order: Change Incoterms on Item Level

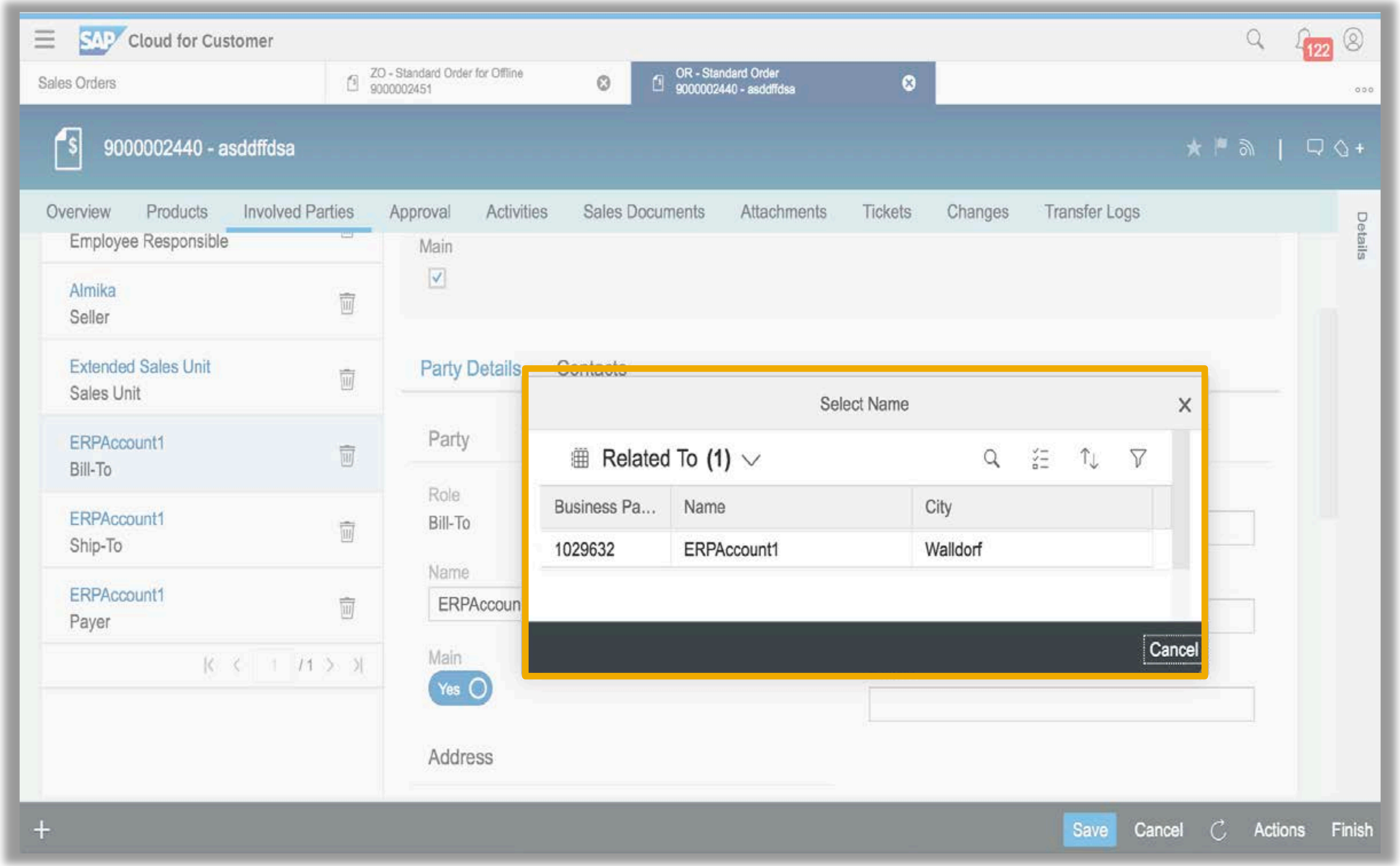


You can now assign different Incoterms on item level. Incoterms are copied from the header to the items by default.

- Add hidden fields Incoterms and Incoterms Location via Adaptation to the Product table.

Referenced Customer Influence idea: https://influence.sap.com/sap/ino/#/idea/208315/

Sales Order: Value Help Enhancement - New “Related To” Query for Easy Selection of Involved Parties and Account Team

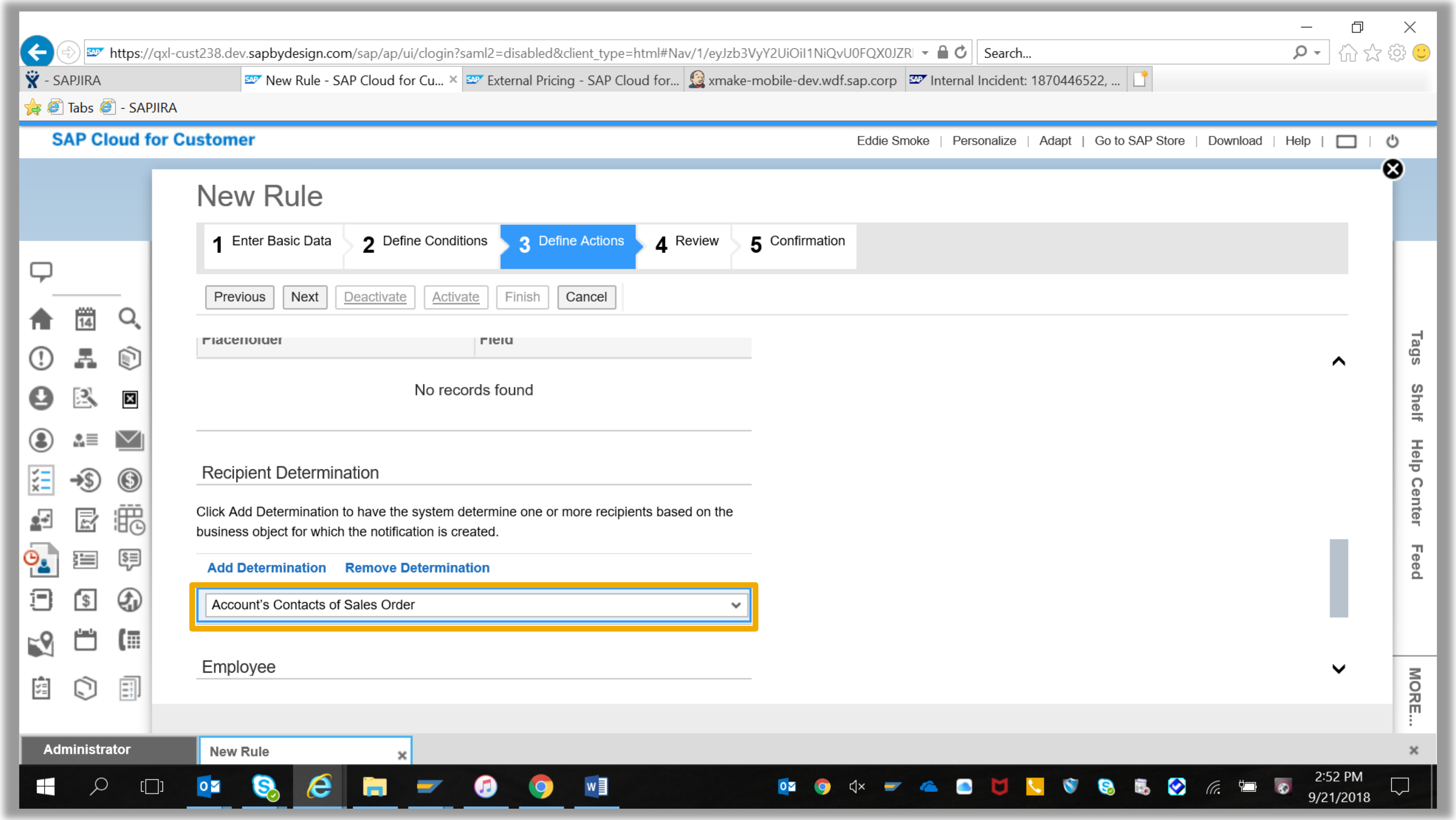


A new standard query ‘Related To’ allows you to filter business partners that are linked to a selected account or other business partner.

- This is in particular helpful for Ship-To, Bill-To, or Payer selections in the involved parties tab (both header and item).

Referenced Customer Influence idea: https://influence.sap.com/sap/ino/#/idea/143081

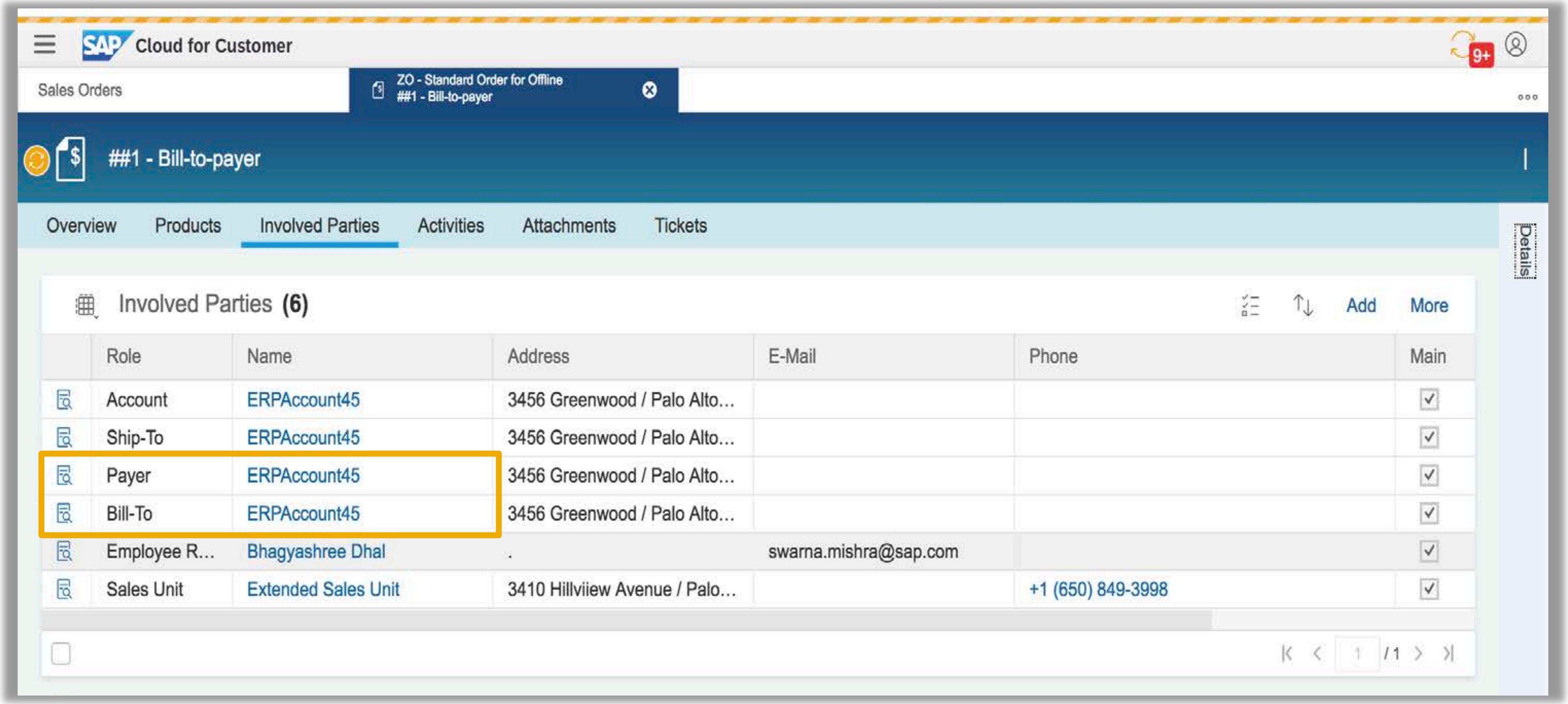
Sales Order: Individual Customer in Workflow



Individual Customer is now available as a destination for for Sales order email via workflow

- Use "Accounts Contacts Of Sales Order" under the Recipient Determination set-up

Sales Order : Offline Party Determination for Bill-To & Payer



Bill-To and Payer parties can now be determined in the Sales Order when in offline mode.

What’s New in 1811 for Flexible Offline Pricing

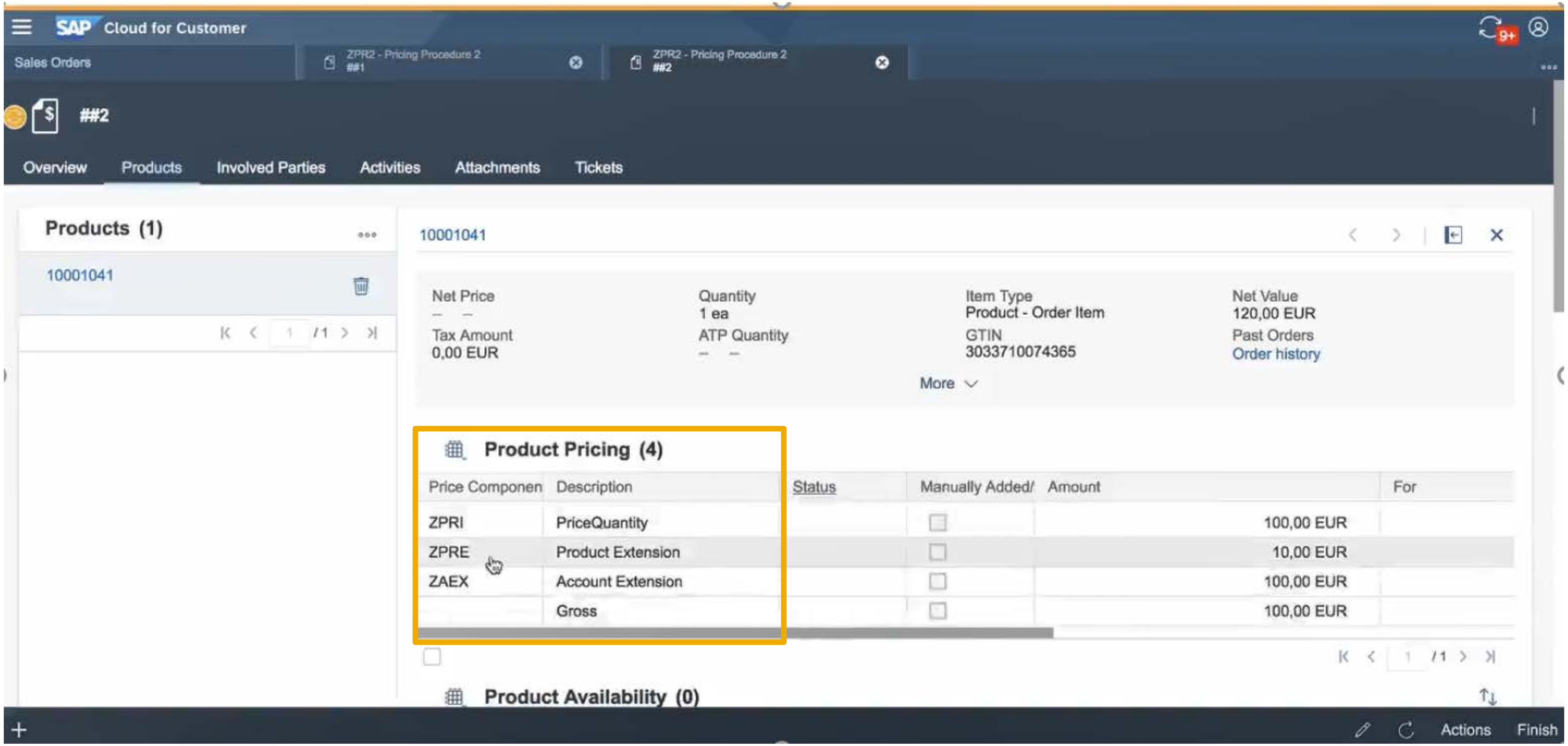
Key Innovations

- Support of Extension Fields for Offline Price Calculation

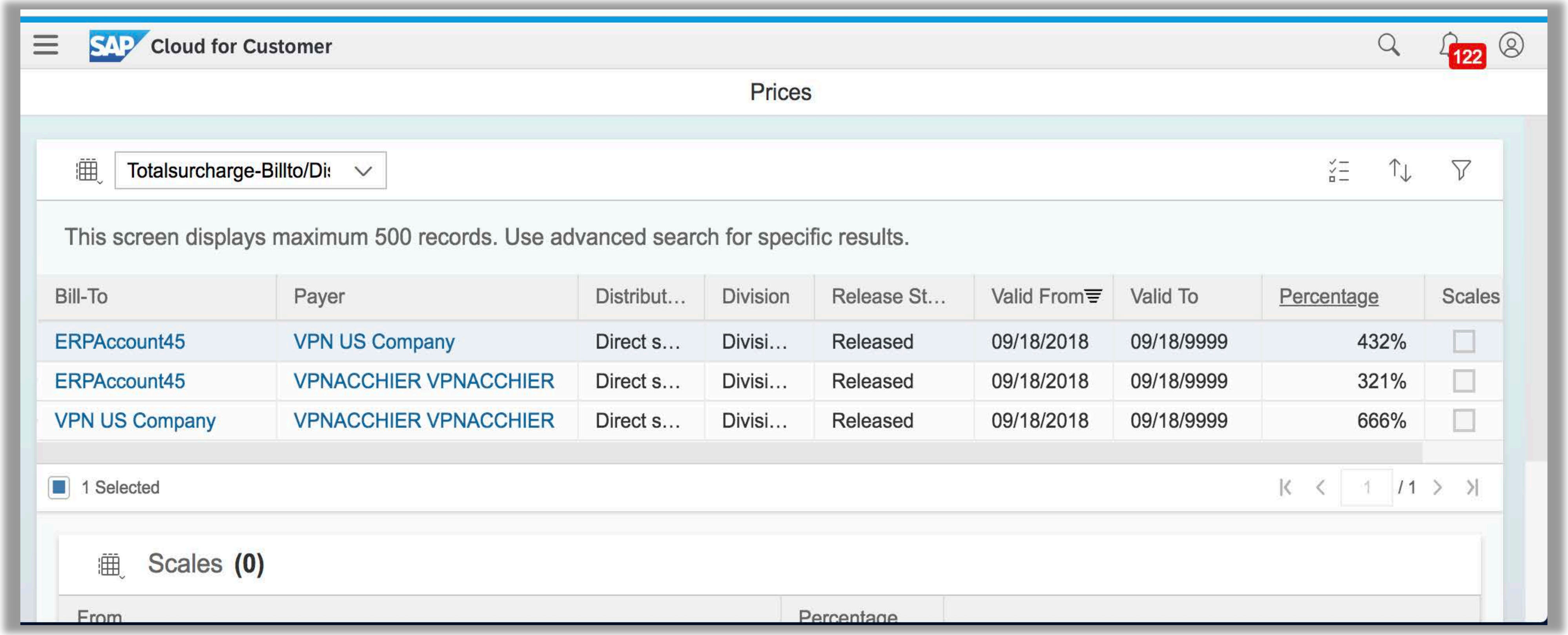
Additional Enhancements

- Support of Addition Fields Payer and Bill-to Party for Offline
- Procedure Download Tool Enhancements

Offline Pricing: Support for Extension Fields

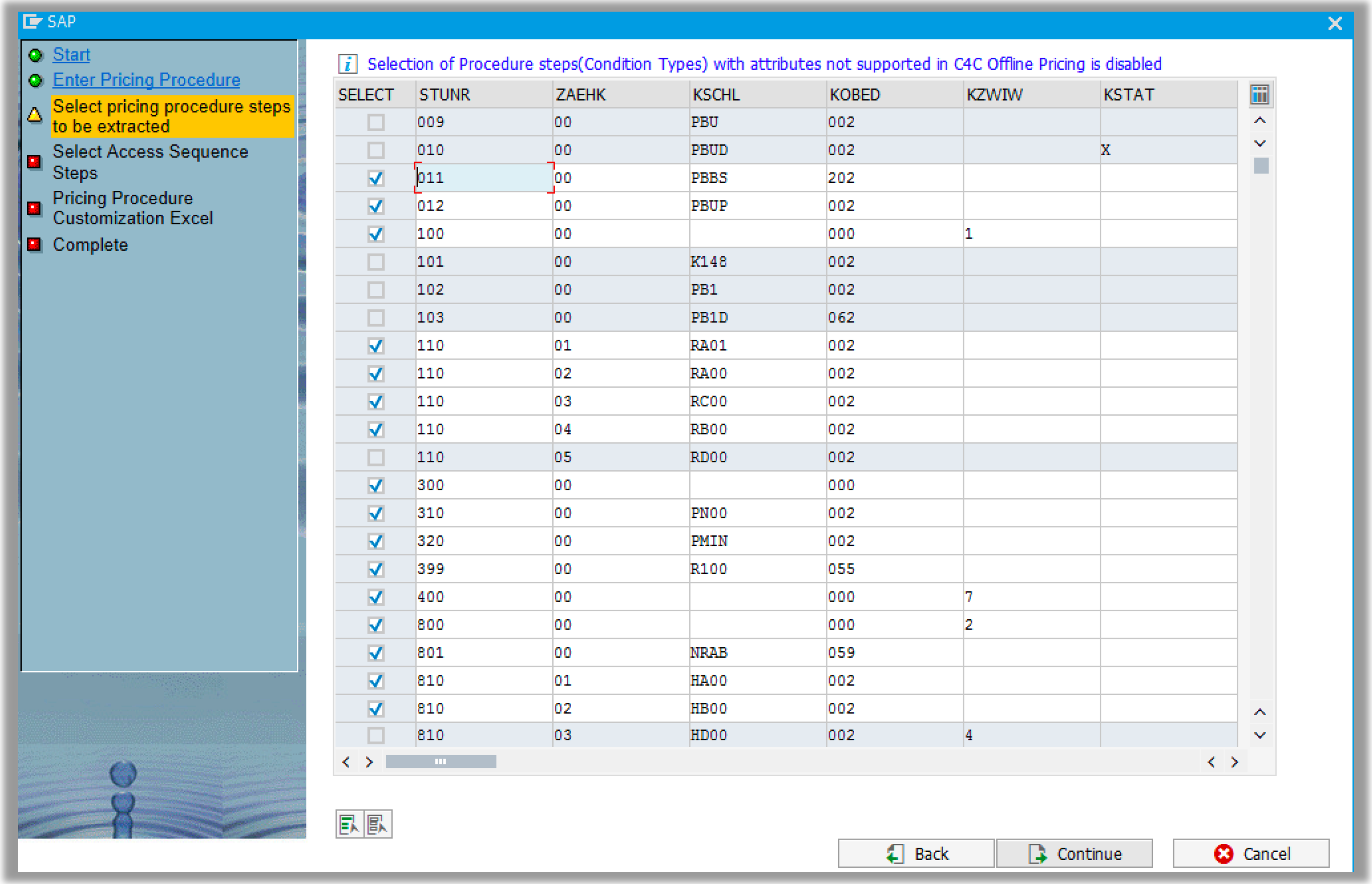


Offline Pricing: Support of Additional Fields ‘Payer’ and ‘Bill-To’ Party for Offline



Use Bill-to-party or Payer for offline price determination in your Condition Table

Offline Pricing: Procedure Download Tool Enhancements



SELECT	STUNR	ZAEHK	KSCHL	KOBED	KZWIW	KSTAT
☐	009	00	PBU	002		
☐	010	00	PBUD	002		X
☑	011	00	PBBS	202		
☑	012	00	PBUP	002		
☑	100	00		000	1	
☐	101	00	K148	002		
☐	102	00	PB1	002		
☐	103	00	PB1D	062		
☑	110	01	RA01	002		
☑	110	02	RA00	002		
☑	110	03	RC00	002		
☑	110	04	RB00	002		
☐	110	05	RD00	002		
☑	300	00		000		
☑	310	00	PN00	002		
☑	320	00	PMIN	002		
☑	399	00	R100	055		
☑	400	00		000	7	
☑	800	00		000	2	
☑	801	00	NRAB	059		
☑	810	01	HA00	002		
☑	810	02	HB00	002		
☐	810	03	HD00	002	4	

The Pricing Procedure Download Tool has been enhanced to show the supported condition types as enabled for selection.

- Once Condition Types have been selected, the tool allows you to select only those access sequences which have the supported fields.
- This aids the user in the upload the procedure in order to minimize errors

What's New in Activities

What’s New in 1811 for Activities

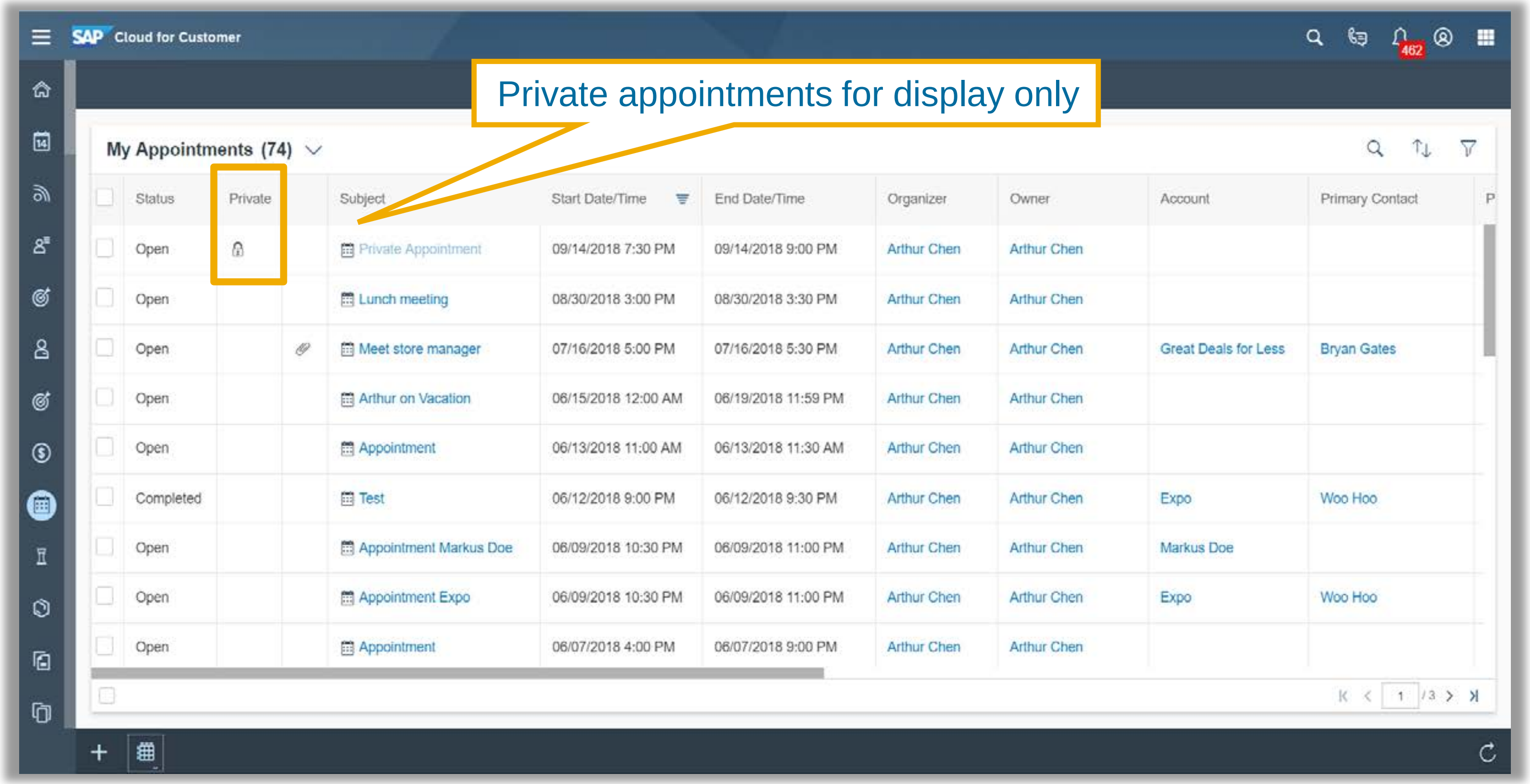
Key Innovations

- Private appointments

Additional Enhancements

- Reporting for phone call tasks/surveys
- Add related items to completed activities & visits
- Add account-specific parties to activities & visits

Activities: Private Appointments



You can now easily differentiate private appointments from regular appointments.

- Appointments designated “Private” by groupware integration display with a designated icon
- These private appointments cannot be rescheduled or opened for further details from with SAP Cloud for Customer.
- Additional groupware logic can be used to strip undesired data from displaying in system.

Key Business Benefits

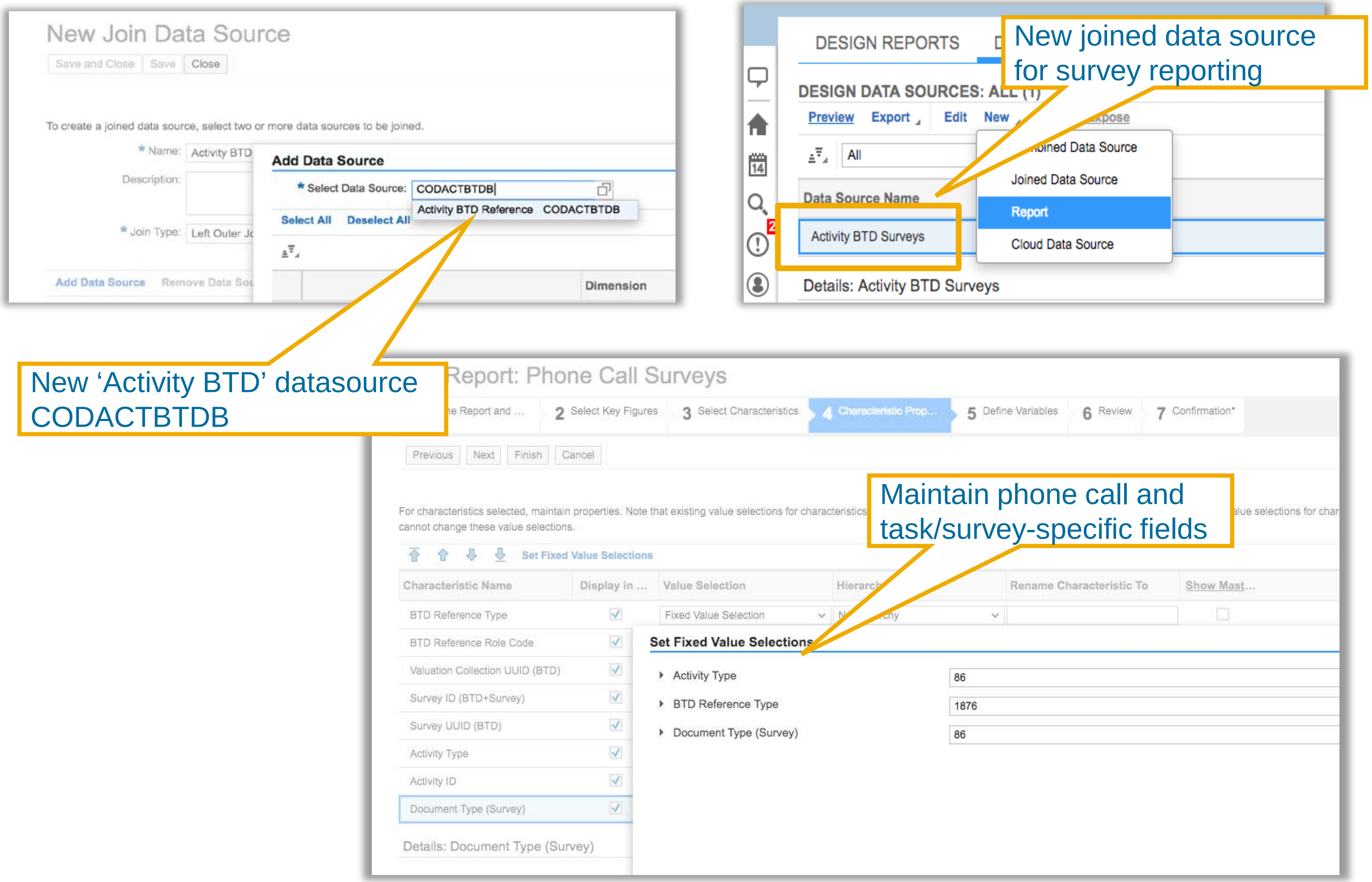
- Ensure private appointments display in your schedule without displaying undesired information.

Set-up Details

- “Private” field needs to be personalized

HTML 5 ☒ Fiori Client ☒

Activities: Reporting for Phone Call Tasks & Surveys



You can now report on task or survey data captured for phone calls.

- You can join the new data source “Activity BTD Reference” with the “Survey Answers” or “Activity Task” data sources to report on task or survey data captured at the time of call.

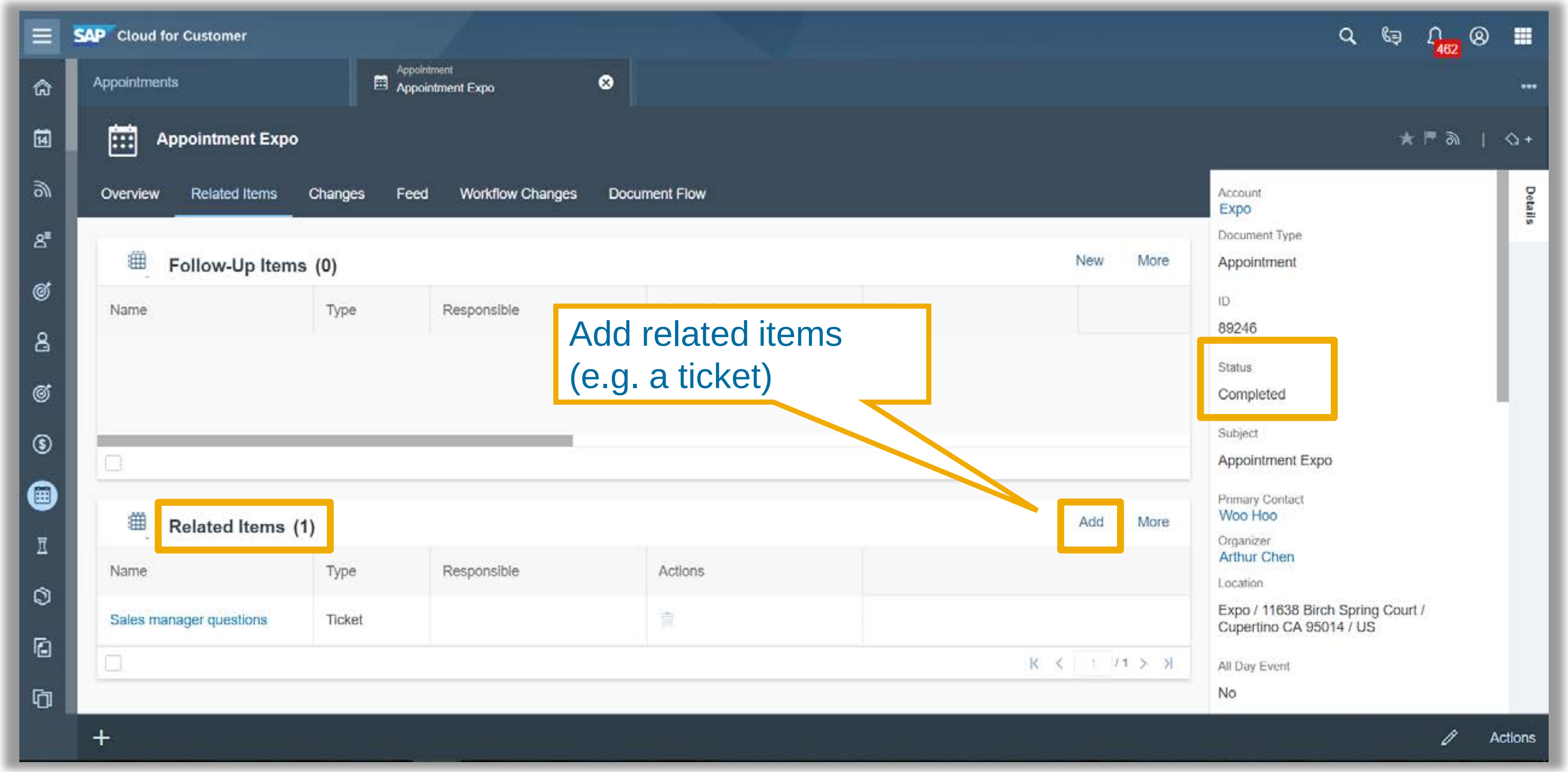
Key Business Benefits

- Gain insights and visibility into data captured during customer facing phone calls.

Set-up Details

- Phone Call data source and fields must be joined with “Activity BTD Reference” to generate reports – please consult documentation for setup details

Activities: Add Related Items to Completed Activities/Visits



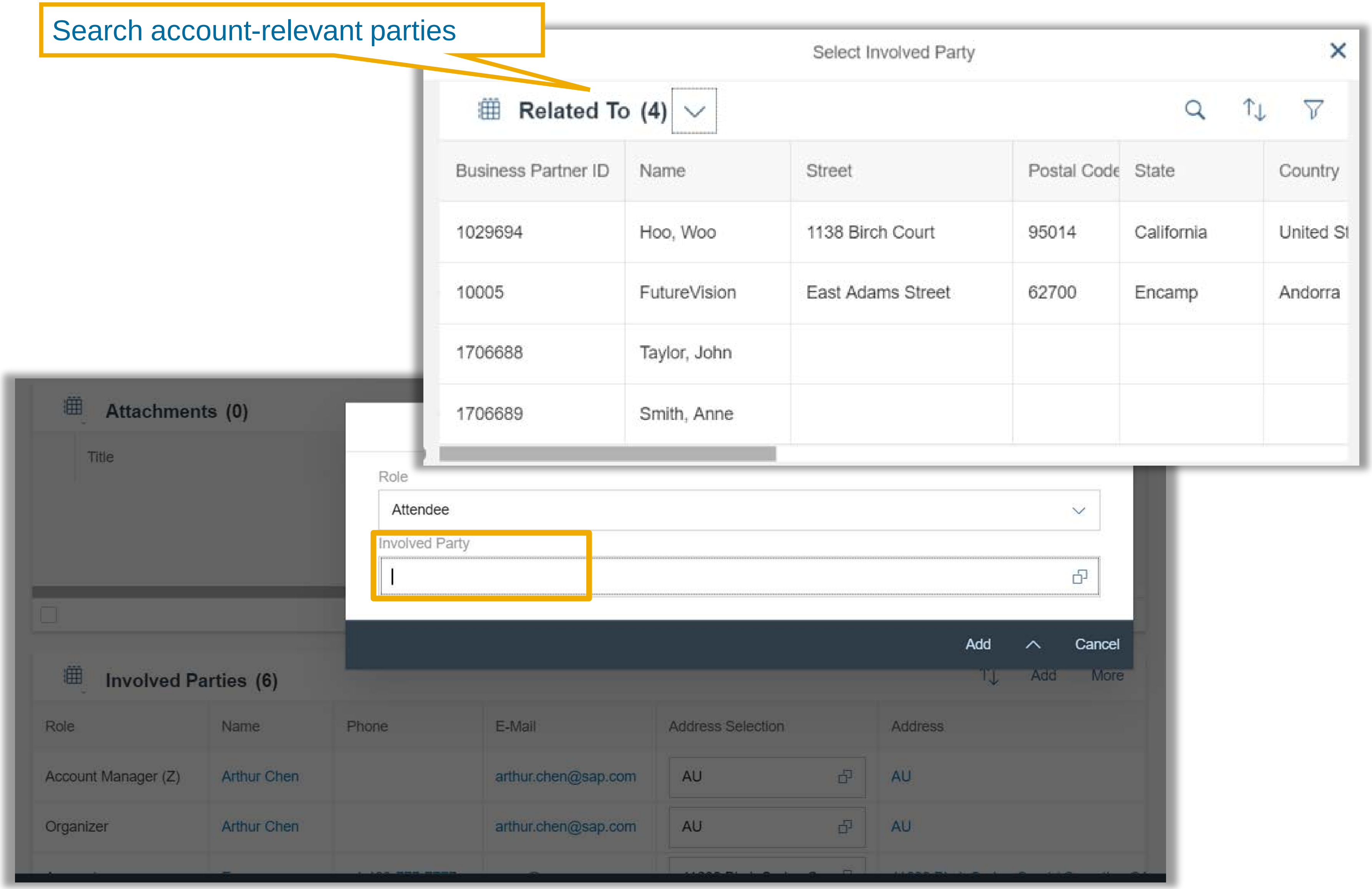
You can now add related items to completed activities and visits.

Key Business Benefits

- Maintain references to key transactions/objects even after completion of an activity.

Customer Influence Request ID
#211021

Activities: Add Account-specific Parties to Activities/Visits



You can now easily add involved parties to an activity, that are related to the activity's Account.

- Quickly add relevant appointment/visit attendees, phone call participants, or custom party roles.

Key Business Benefits

- Improved efficiency by using a filtered list of relevant parties to reduce search time.

Customer Influence Request ID #135014

What’s New in Visits

What’s New in 1811 for Visits

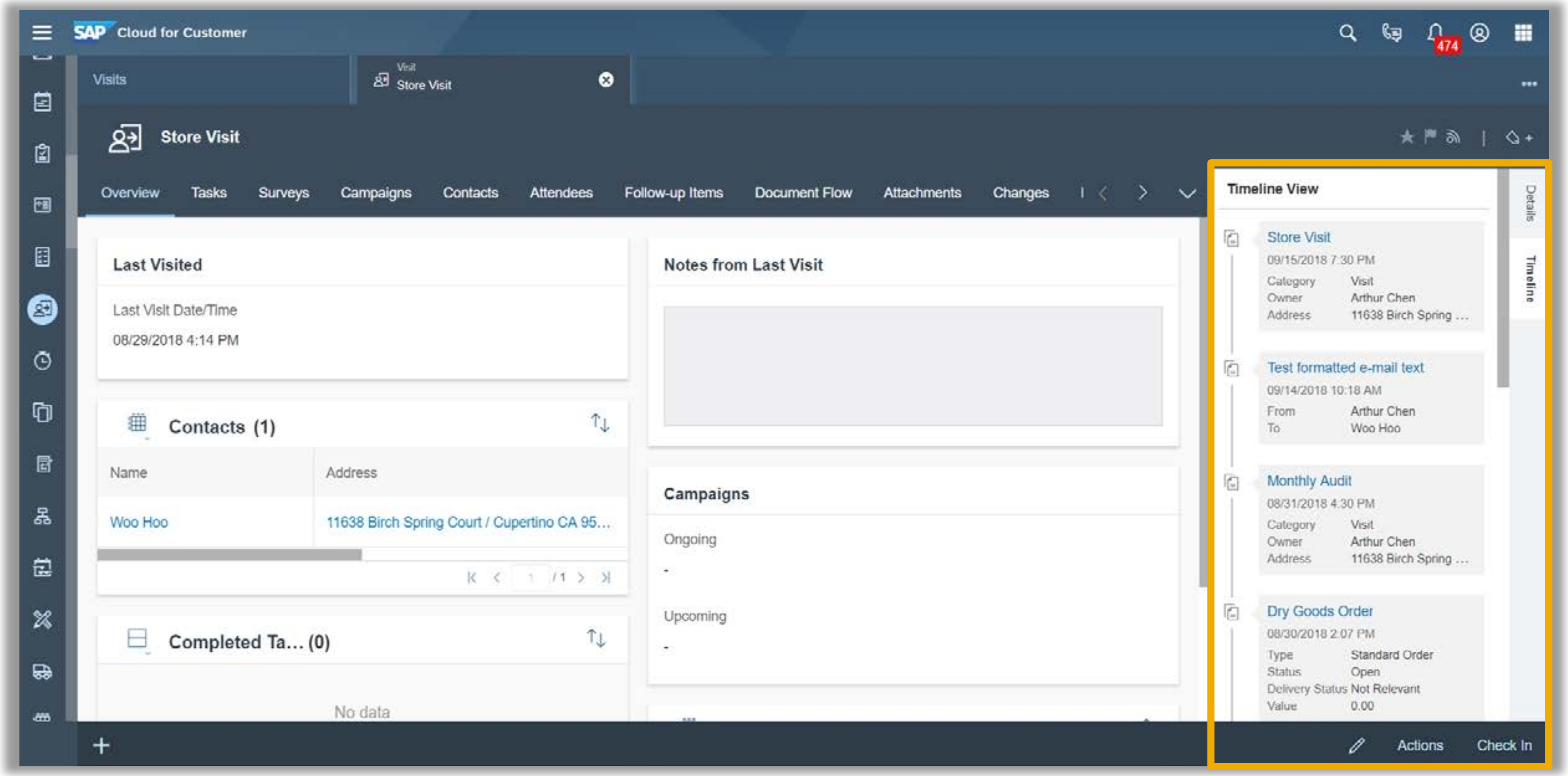
Key Innovations

- Interaction Timeline for Visits
- Geo-fencing Visit Checkout Reminder

Additional Enhancements

- Enhanced Task/Survey Reporting
- Data Source Enhancements

Visits: Interaction Timeline



You can now view account-relevant interactions in a scrollable chronological format while executing visits.

- View activities, service tickets, and sales documents, and navigate to objects as needed.

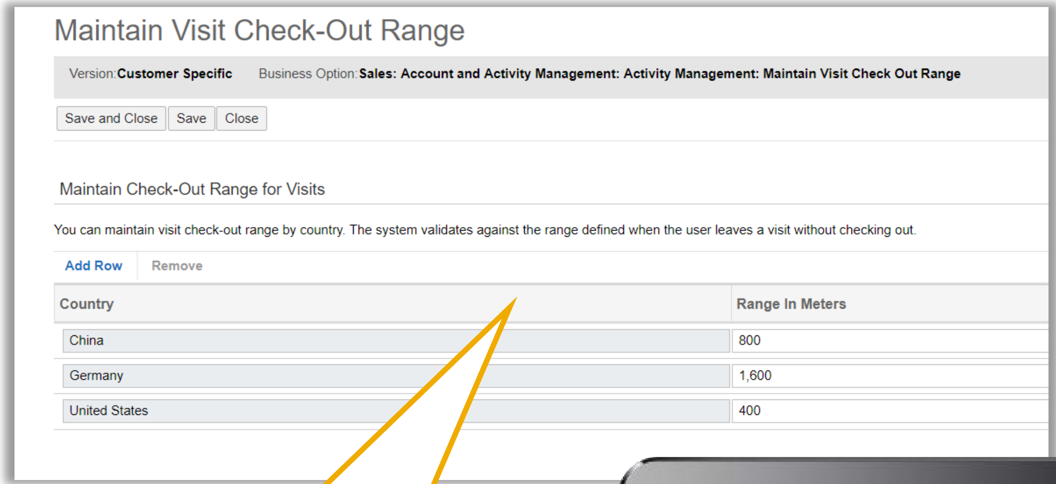
Key Business Benefits

- Improved insights for greater visibility to planned and historical visit activities.

Set-up Details

- Timeline facet must be personalized as visible, and side pane must be enabled.

Visits: Geo-fencing Visit Checkout Reminder


Maintain Visit Check-Out Range

Version: **Customer Specific** Business Option: **Sales: Account and Activity Management: Activity Management: Maintain Visit Check Out Range**

Save and Close | Save | Close

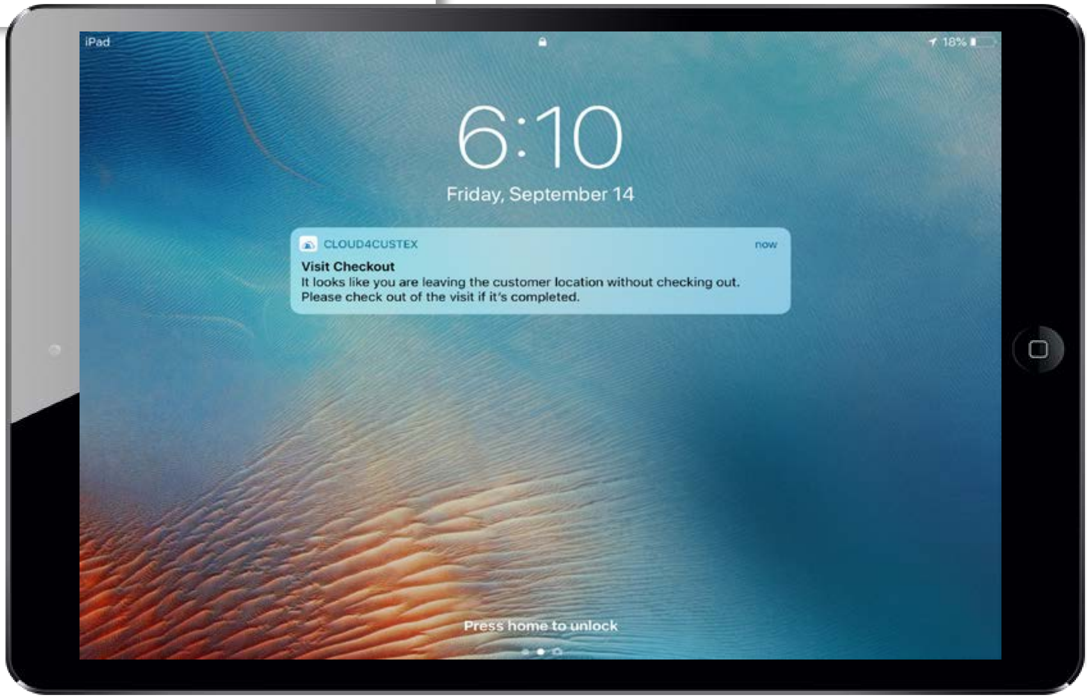
Maintain Check-Out Range for Visits

You can maintain visit check-out range by country. The system validates against the range defined when the user leaves a visit without checking out.

Add Row | Remove

Country	Range In Meters
China	800
Germany	1,600
United States	400

Maintain threshold to trigger check-out reminders



You can now be prompted to check out of a visit, if you've left the visit location without doing so.

- Configure region-specific thresholds which trigger a notification to your mobile device when you leave a visit location without checking out.

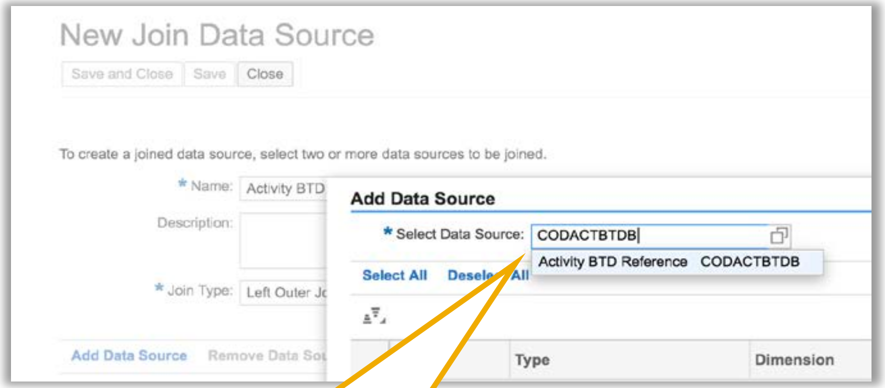
Key Business Benefits

- Reduce data inconsistencies and ensure proper tracking of visit execution times

Set-up Details

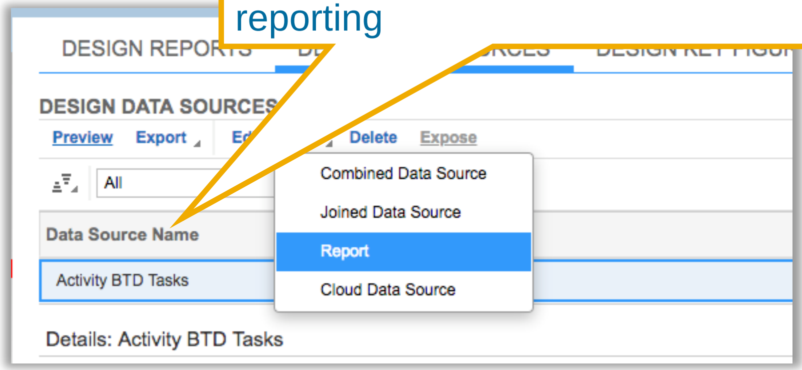
- Fine-tuning for check-out prompt distance threshold required

Visits: Enhanced Reporting for Tasks/Surveys



New ‘Activity BTD’ datasource CODACTBTDB

New joined data source for task reporting



You can now report on tasks created during visit execution.

- You can utilize the new “Activity BTD Reference” datasource with the “Activity Task” data source to report on tasks.
- Filter by visits to report upon the full list of worklist tasks created during both Visit planning, and Visit execution.

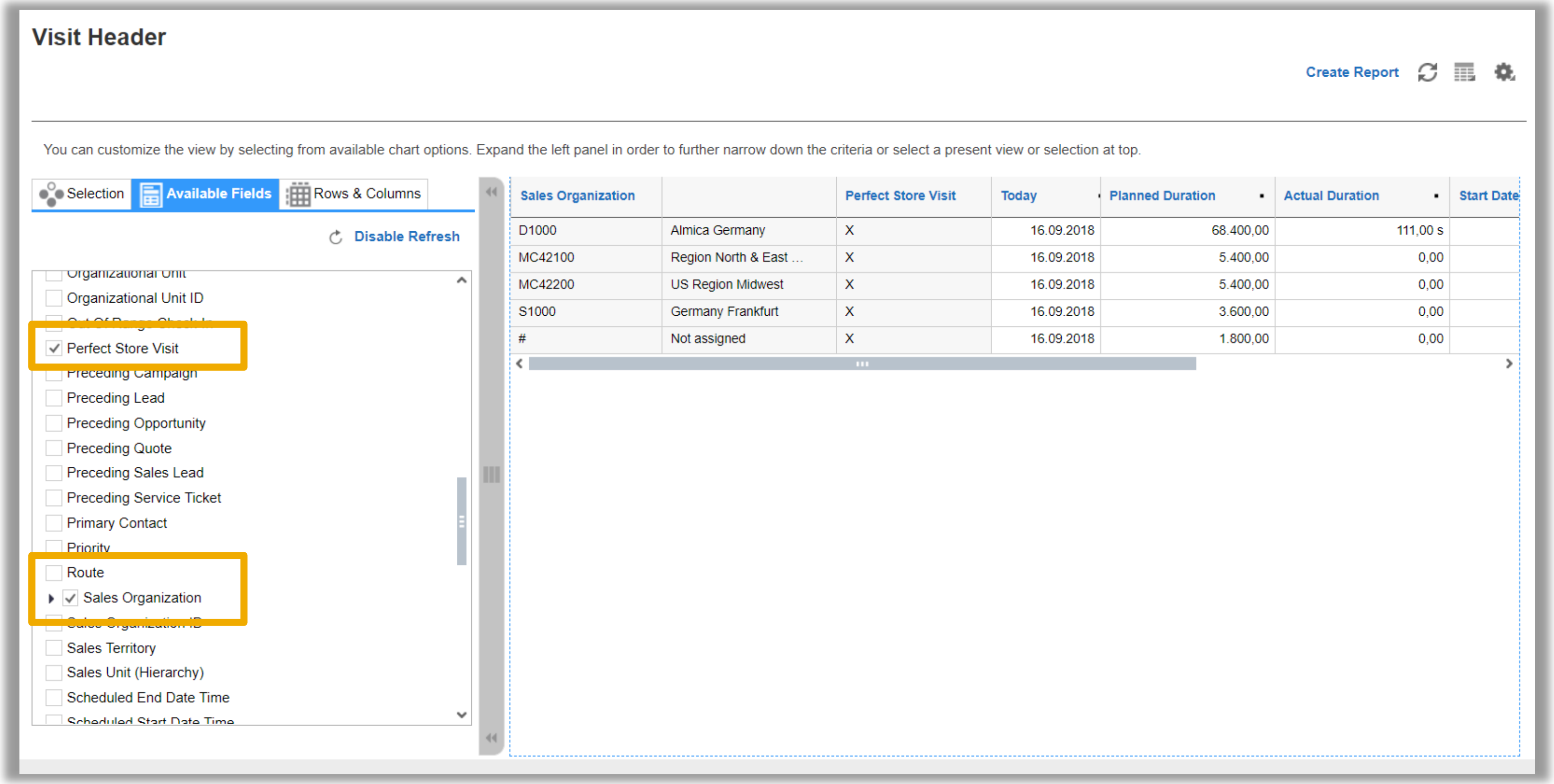
Key Business Benefits

- Report on all worklist tasks.

Set-up Details

- Data source administration required for report usage.

Visits: Datasource Enhancements – for Perfect Store



You can now filter visit reports by sales organization and create reports specifically for Perfect Store visits.

Key Business Benefits

- Improved usability by using a filtered list of relevant parties to reduce search time.

What’s New in Calendar

What's New in 1811 for Calendar

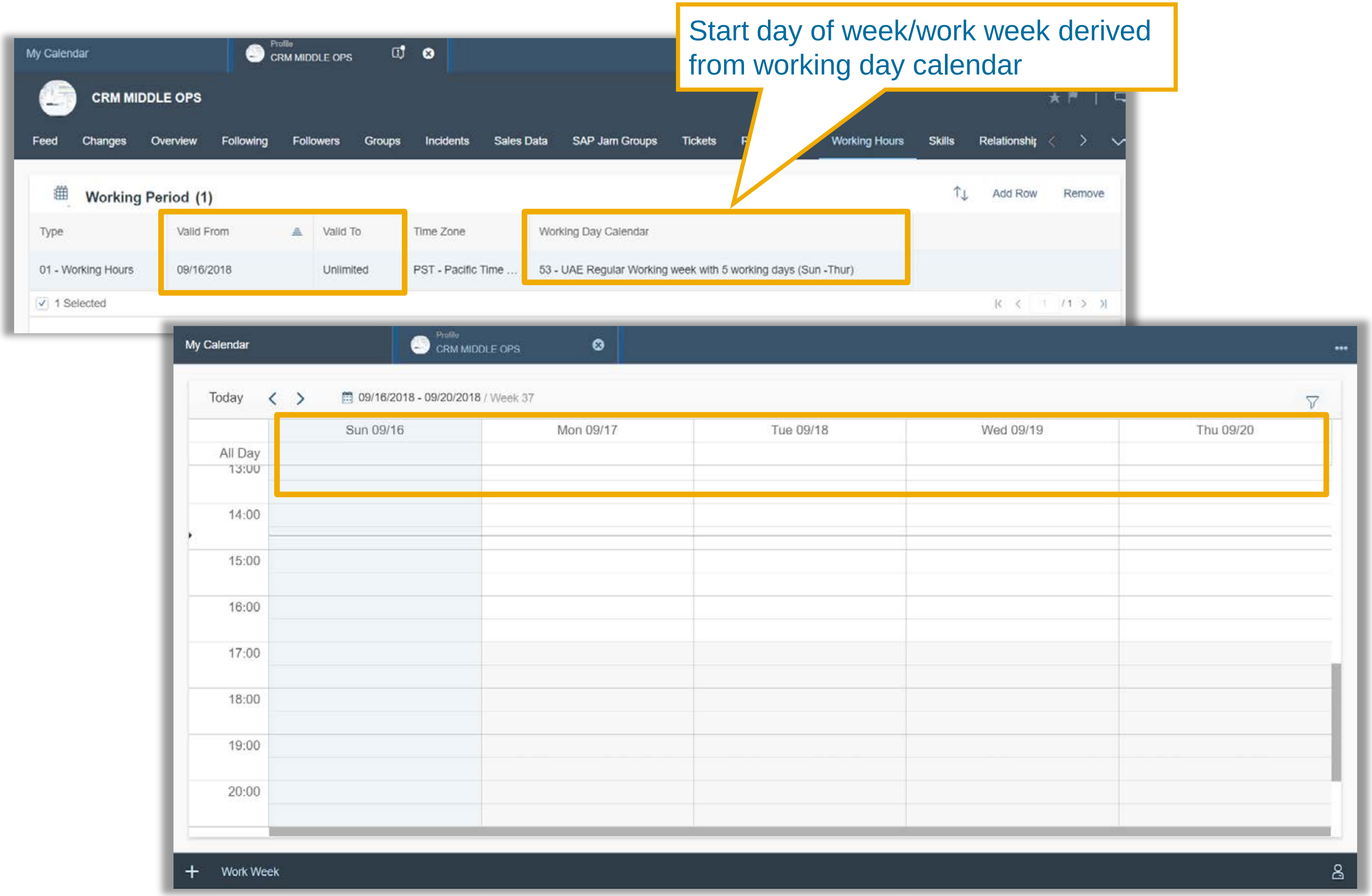
Key Innovations

- Locale-based Calendar Visualization

Additional Enhancements

- Personalization of Calendar Filters
- Day Map View Enhancements

Calendar: Locale-based Calendar Visualization



You can now see the calendar work week and start day of the week by the selected time zone region.

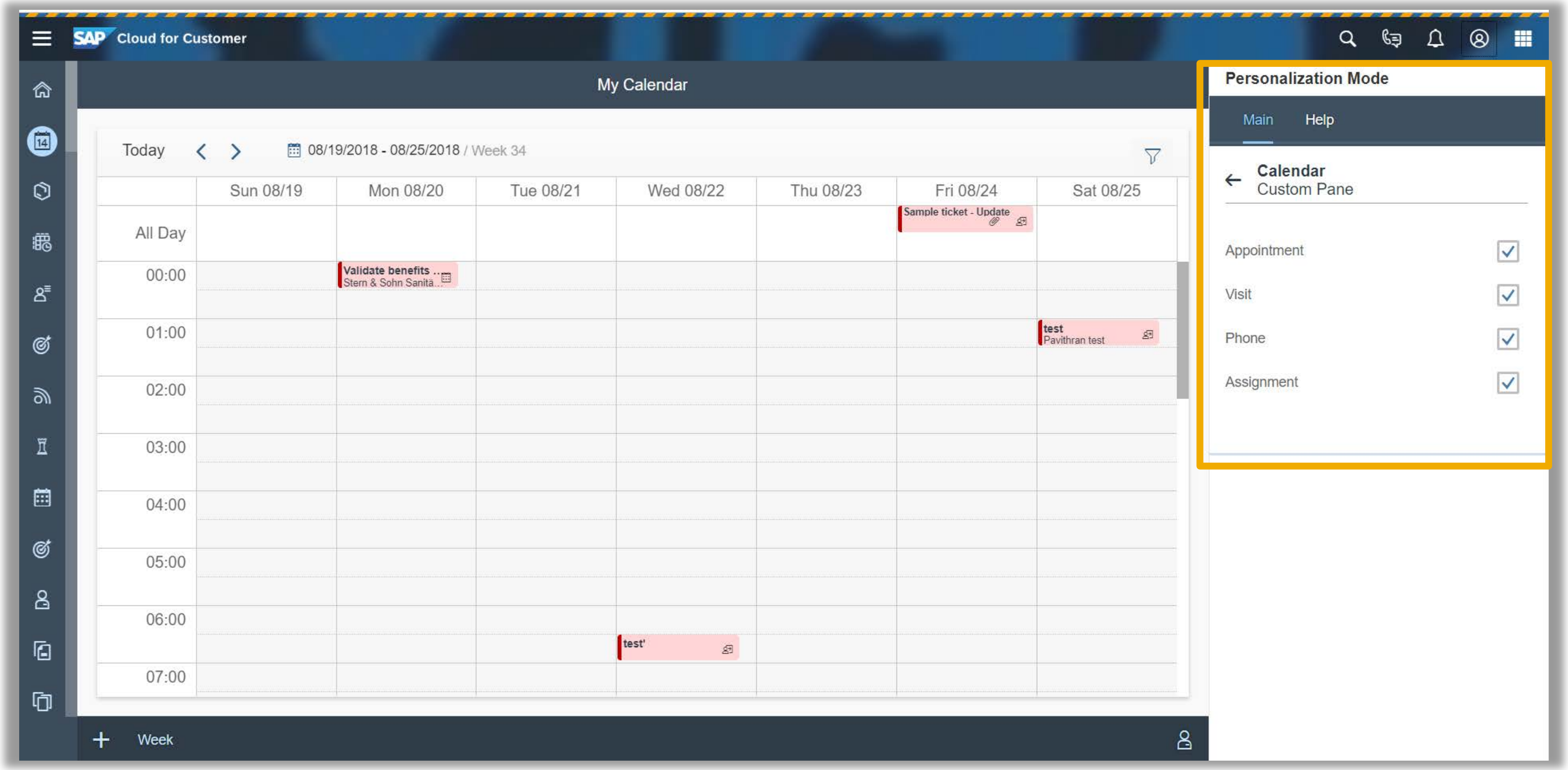
- Maintain working day calendar for employee and validity period
- Calendar work week reflects working days
- Date picker and week view reflect appropriate start day of week

Key Business Benefits

- Enhanced calendar usability for each region of your business.

Customer Influence ID #140700

Calendar: Personalization of Calendar Filters



You can now filter activity types from your calendar.

- You can personalize which activities are relevant for your calendar display (e.g. only Appointments/Visits).
- These can be checked and unchecked as desired (as shown in the screen shot)

Key Business Benefits

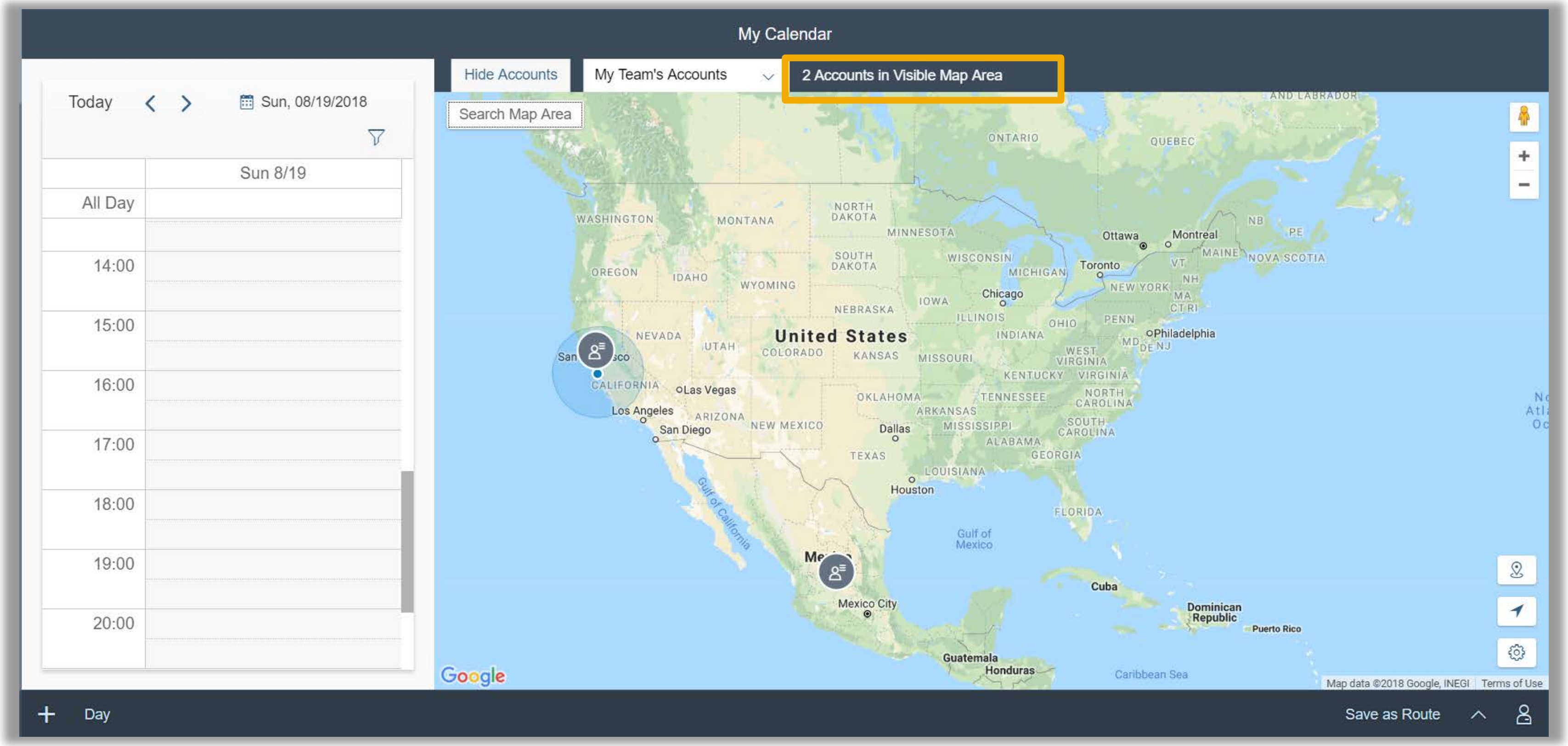
- Enhanced calendar usability and faster work processes

Set-up Details

- Calendar personalization required to specify which activities to display.

Customer Influence ID #208454

Calendar: Day Map View Enhancements



You now have a convenient indicator that shows the number of accounts that are displayed within the selected map area.

Key Business Benefits

- Overall usability enhancement when planning ad-hoc visits.

What's New in Survey

What’s New in 1811 for Survey

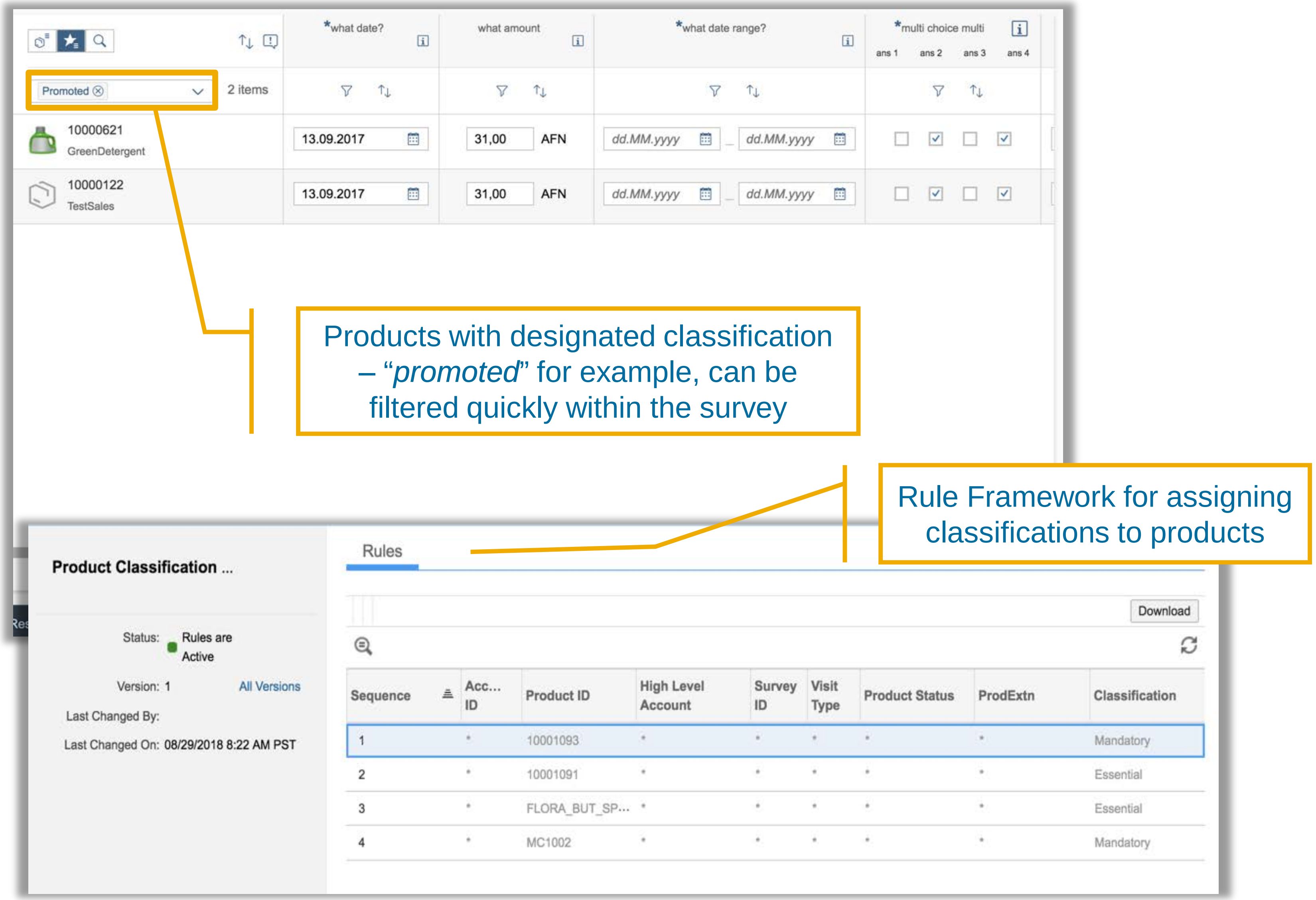
Key Innovations

- Product Classification in Surveys
- Updating Marketing Attributes using Surveys
- Addition of Registered Products when Executing a Survey

Additional Enhancements

- Configurable Text box Size for Text Type Question
- Usability Enhancement for Matrix Questions
- Mobile Library Adoption for External Surveys
- Option to Disable “Add Products” User Action During Survey Execution
- Support for Copy of Previous Answers and Previous Products in Opportunities
- OData Services for Surveys

Surveys: Product Classification in Product Surveys



Products in a survey can now be flexibly classified to simplify survey execution.

- The classification of products is based on a flexible rule framework.
- Products can also be classified as mandatory based on the rules framework

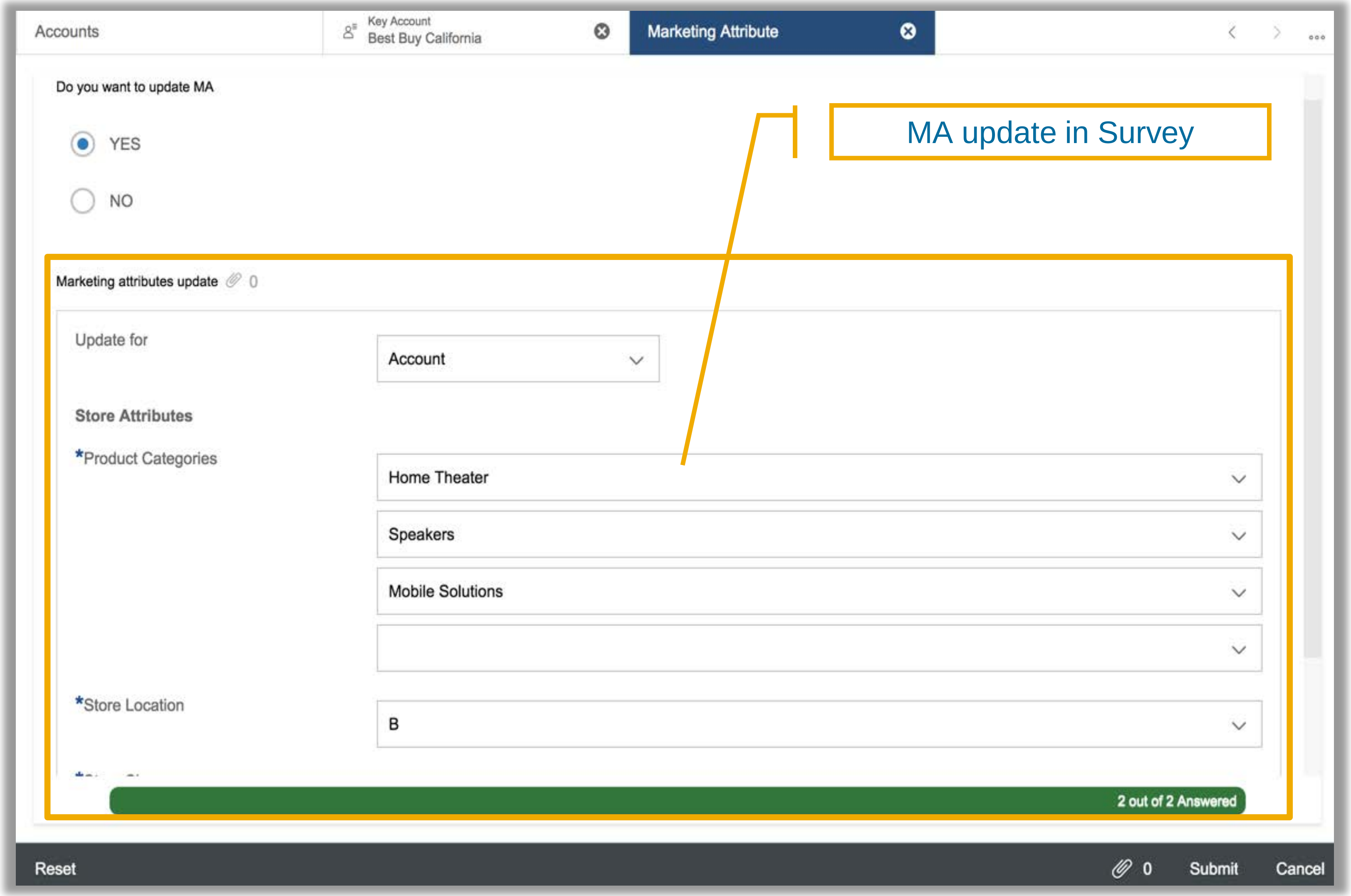
Key Business Benefits

- Enables you to quickly identify all of the surveyed products of a certain classification allow for more efficient prioritization and completion.
- Can be used to ensure that the mandatory products are answered before the completion of the survey

Set-up Details

- The classifications are maintained in the fine tuning activity
- The rule framework is maintained based on the parameters available – Administrator -> Sales and Campaign Settings-> Define rules for Survey Product classification

Surveys: Updating Marketing Attributes using Surveys



The marketing attributes for Accounts and Contacts can now be updated using a survey.

Key Business Benefits

- Provides the flexibility to the user to directly update a marketing attribute from the survey.
- Multiple attributes can be updated in one survey question.

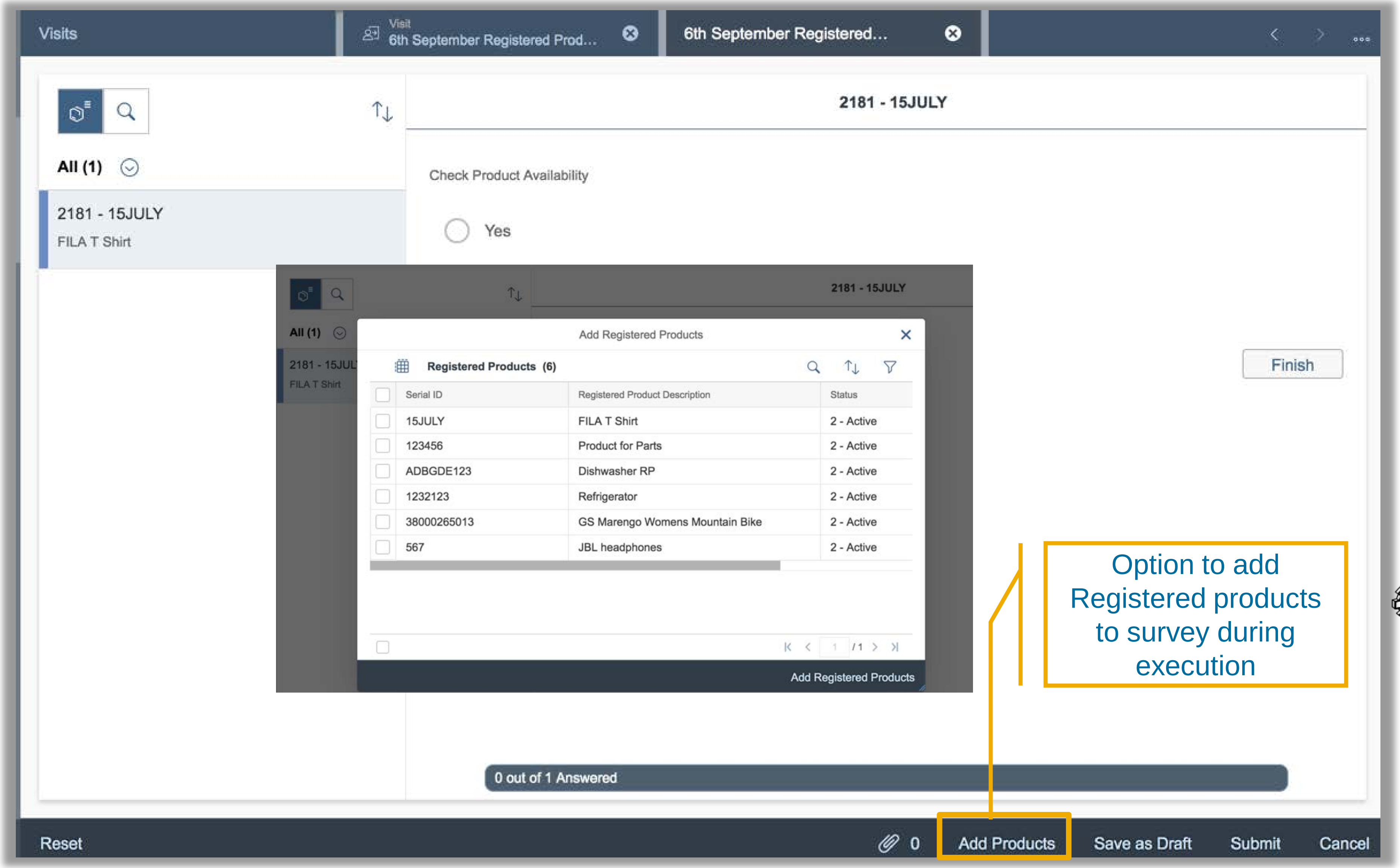
Set-up Details

- Add a question of type ‘Attribute’
- Select the attribute set and attribute to be added in the survey

Notes:

- Only the default contact marketing attributes can be updated
- Only one question of type attributes can be included in a survey
- Only updates are possible. Create scenarios are not supported

Surveys: Addition of Registered Products when Executing a Survey



You can now add Registered Products to a survey during survey execution

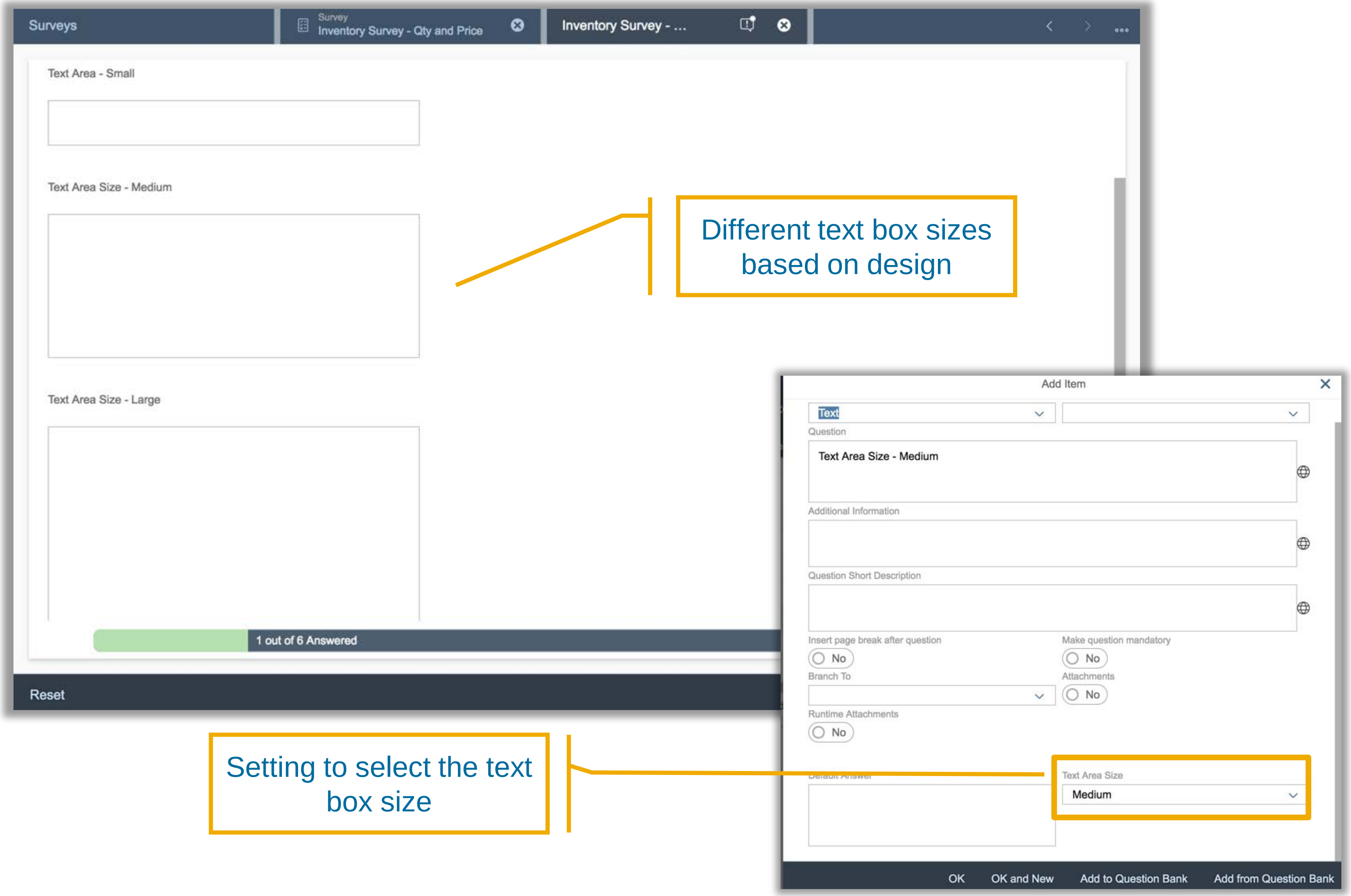
Key Business Benefits

- Additional registered products can be added to the survey on an ad-hoc basis during execution
- Removes the hard dependency requiring all registered products to be added during survey design

Set-up Details

- Enabled by default

Surveys: Configurable Text box Size for Text Type Question



For ‘Text’ question types in a survey, you can now specify the size of the text box during survey design.

Key Business Benefits

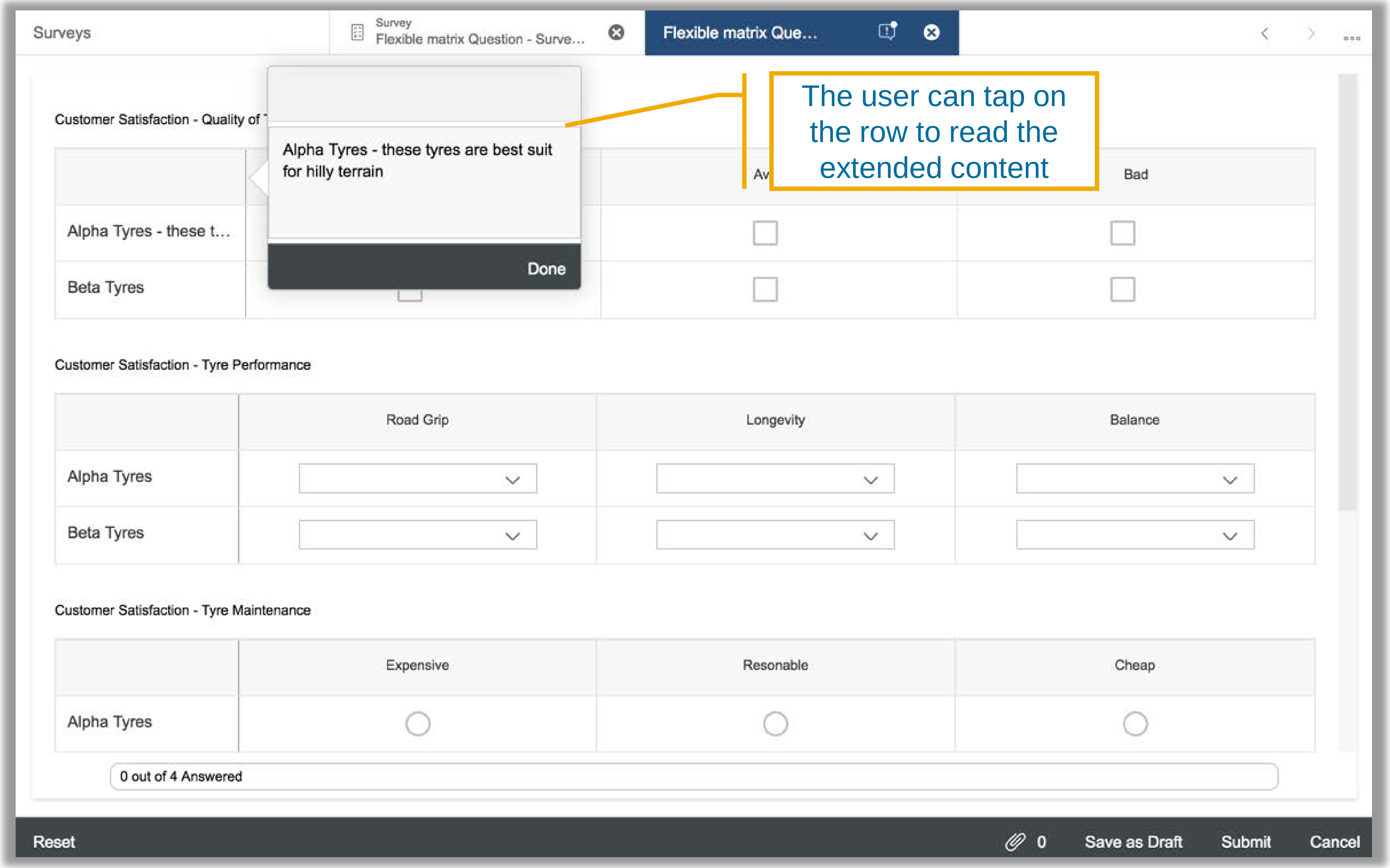
- Improves the usability of the text type question and also optimizes the space allotted to a text type question/answer

Set-up Details

Design time survey

- The user can select either small, medium or large size text box
- The default size is set to medium

Surveys: Usability Enhancement for Matrix Questions



You can now tap on a cell to see extended content, when the content of the cell is truncated for display purposes.

Key Business Benefits

- Improved usability of the matrix question types.

Set-up Details

- Enable by default

Surveys: Mobile Library Adoption for External Surveys

Screen shot not yet available

With Mobile library adoption, the rendering of external surveys on mobile devices has been optimized for compliance with responsive UI technology.

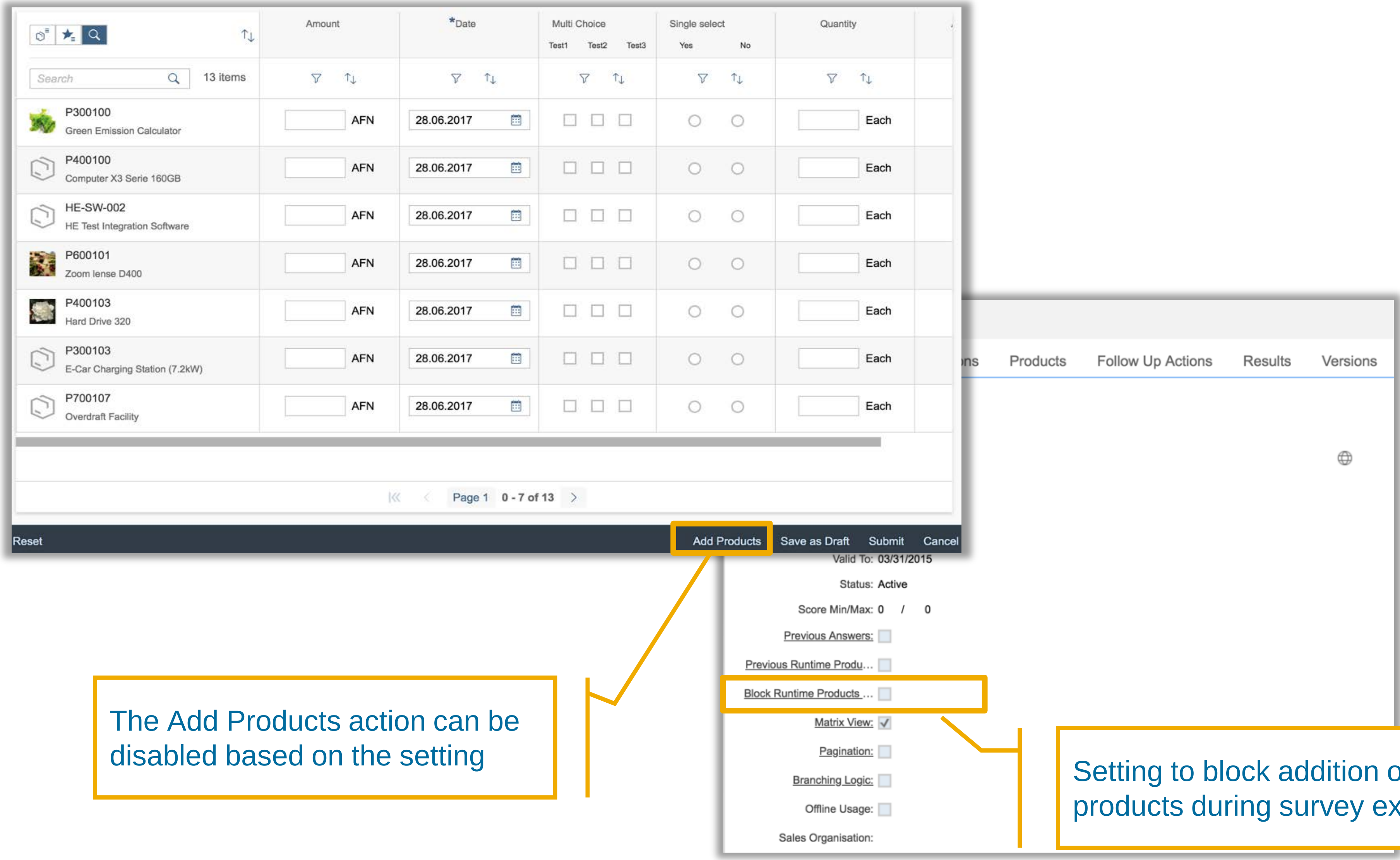
Key Business Benefits

- This Usability enhancement improves the user experience of external surveys

Set-up Details

- Available by default

Surveys: Option to Disable “Add Products” Action During Survey Execution



The Add Products action can be disabled based on the setting

Setting to block addition of products during survey execution

The option to ‘Add Products’ during survey execution, can now be switched off as part of survey design

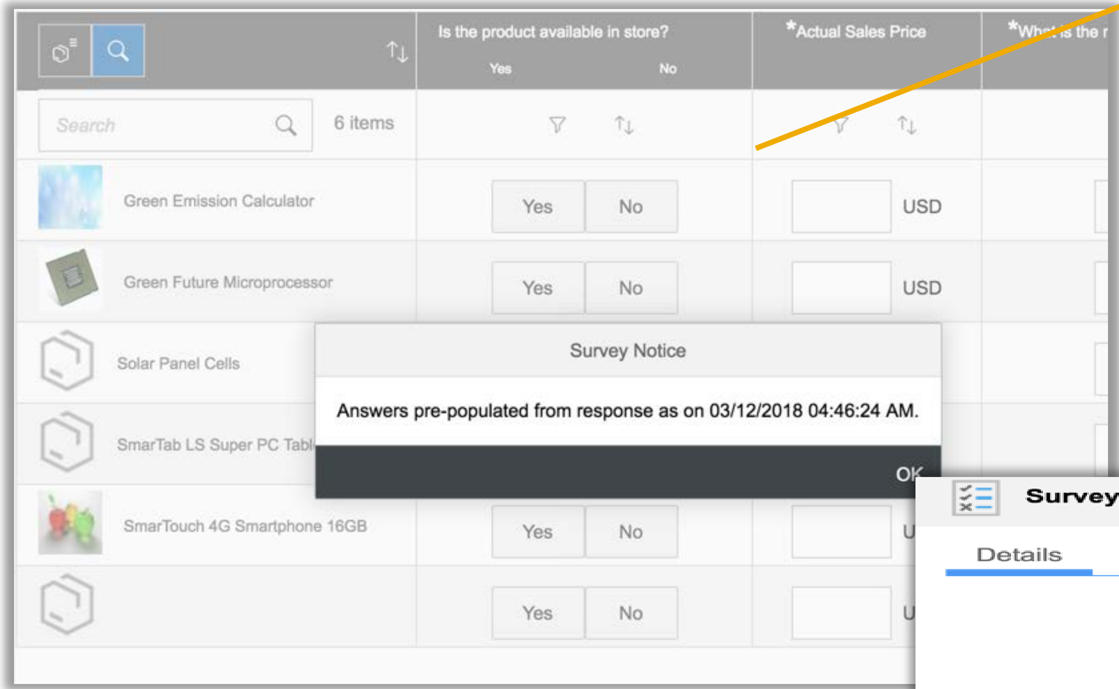
Key Business Benefits

- Enhanced control for use cases where the addition of products during survey execution is not desired.

Set-up Details

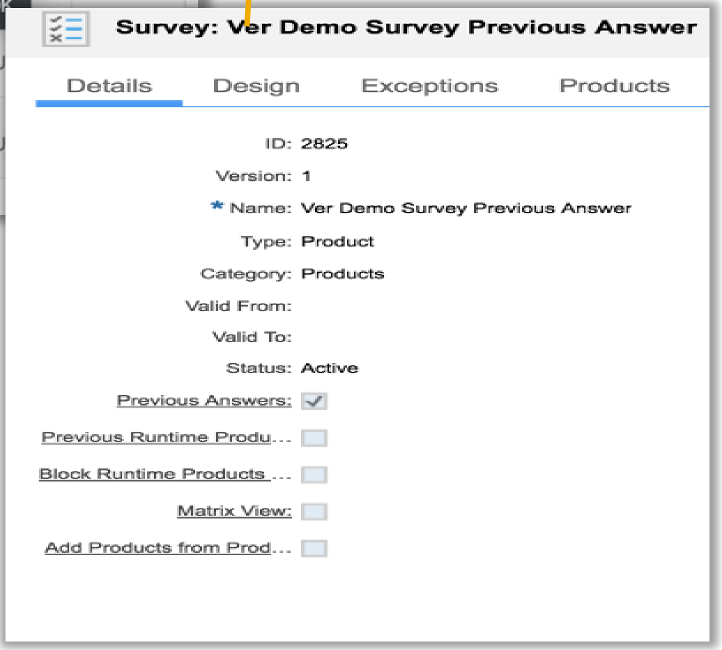
- Select the block runtime products addition option while designing the survey

Surveys: Support for Copy of Previous Answers and Previous Products in Opportunities



Survey in opportunity with the functionality

Setting to enable the functionality



When designing surveys for use in opportunities, survey creators can now specify to copy either previous answers or previous products from the last survey executed.

Key Business

- Streamlines the survey completion process for improved efficiency.
- The copy process is executed automatically during survey execution.

Set-up Details

- The previous answers and previous runtime products flags should be enabled while designing the survey

Surveys: OData Services for Surveys

OData services are available for both design time and runtime time of surveys.

Key Business Benefits

- The OData services can help in mass migration of survey design time from one system to another.
- The services can be used to update/ modify and responses within a survey from an external system

What’s New in Perfect Store

What's New in 1811 for Perfect Store Execution (GA) (Online ONLY)

Score and Benchmark your In-Store Strategies

The Perfect Store solution is a methodology that makes the most of retail execution information and takes a highly disciplined approach to achieving maximum sales.

To deliver 'perfect' in-store execution every time, and achieve the best results at each Point of Engagement (POE), we need to ensure that each POE meets specific, customer defined KPIs to achieve the 'Perfect Store Score'. Each KPI will drive retail execution excellence. This solution is built on the existing building blocks of C4C Retail Execution. It offers:

- **A Holistic Assessment :** of in-store strategy at every point of engagement with the consumer.
- **Guided execution :** with interactive store map displaying activities and audits by location in store
- **Conversion :** of qualitative information into quantitative KPIs to enable benchmarking and follow-up actions

Administration

- Definition of Engagement Map (Store Layout) with Optional Visual Representation
  - Assignment of Store Layout to Account / Account Hierarchy / Target Group
- Definition of Points of Engagement
  - @ Points of Engagement
    - Association of Registered Products
    - Association of Surveys, Tasks and/or Questions
- Define KPIs (Simple & Advanced), Set aggregation rules, scales & thresholds for Scoring & KPIs
- Assignment of perfect store assessment to Visit

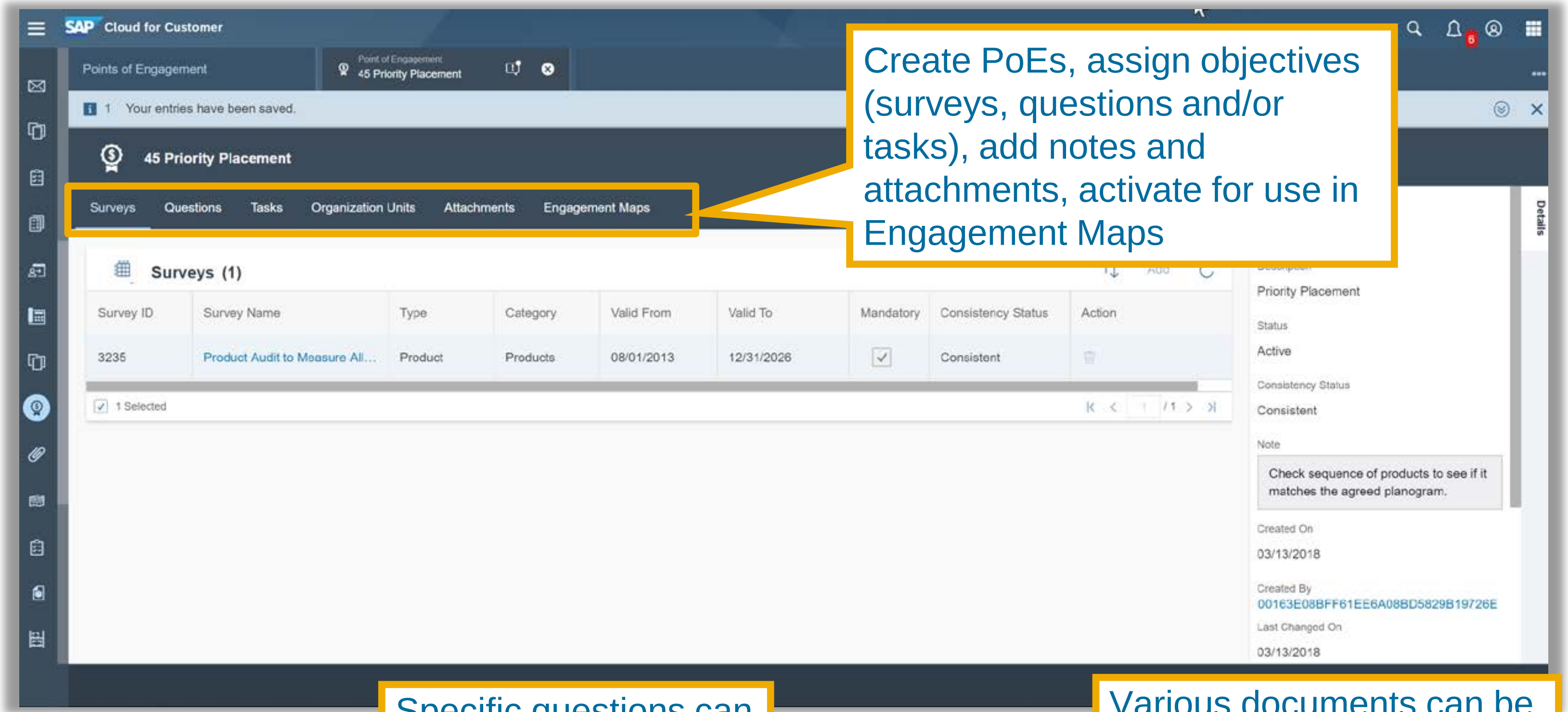
Execution

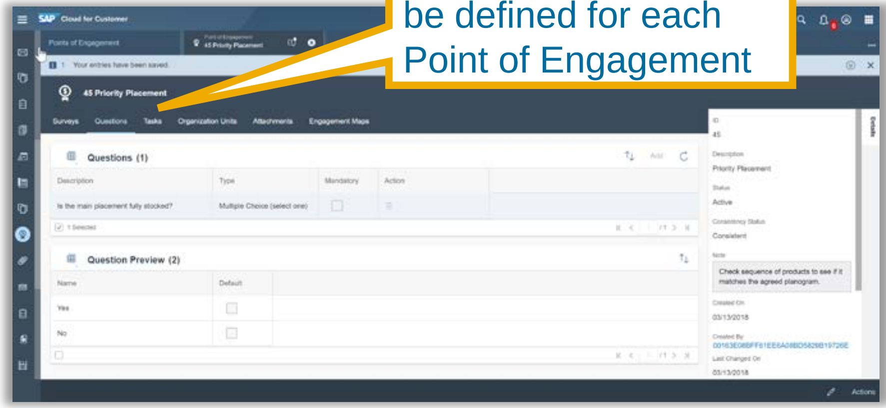
Optimized user experience for Perfect Store Execution

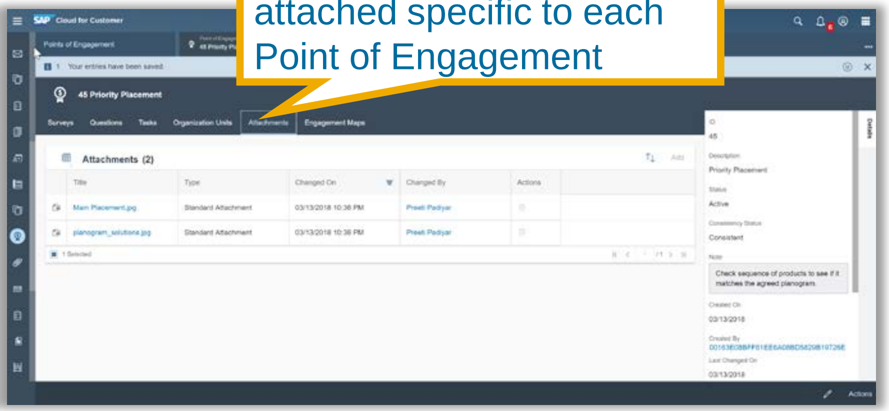
- Use visual engagement maps for a guided execution of objectives at each Point of Engagement.
- On execution of objectives, use the option to score specific set KPIs or alternately the holistic store performance.
- Visual cues to indicate if KPIs have met the set thresholds for success.

What’s New in
Perfect Store Administration

Topic Area: Points of Engagement







Displays, Holiday Placements, assets, etc in the store can be defined as 'Points of Engagement'

- Define Points of Engagement (PoE), associate registered products and add activities like surveys, questions AND/OR tasks to be executed at that point.
- PoEs can be re-used across store layouts or created unique to one layout.
- Depending on the scoring methodology used (survey based store scoring), weightages can be given to the activities and/or to the PoEs for score aggregations.

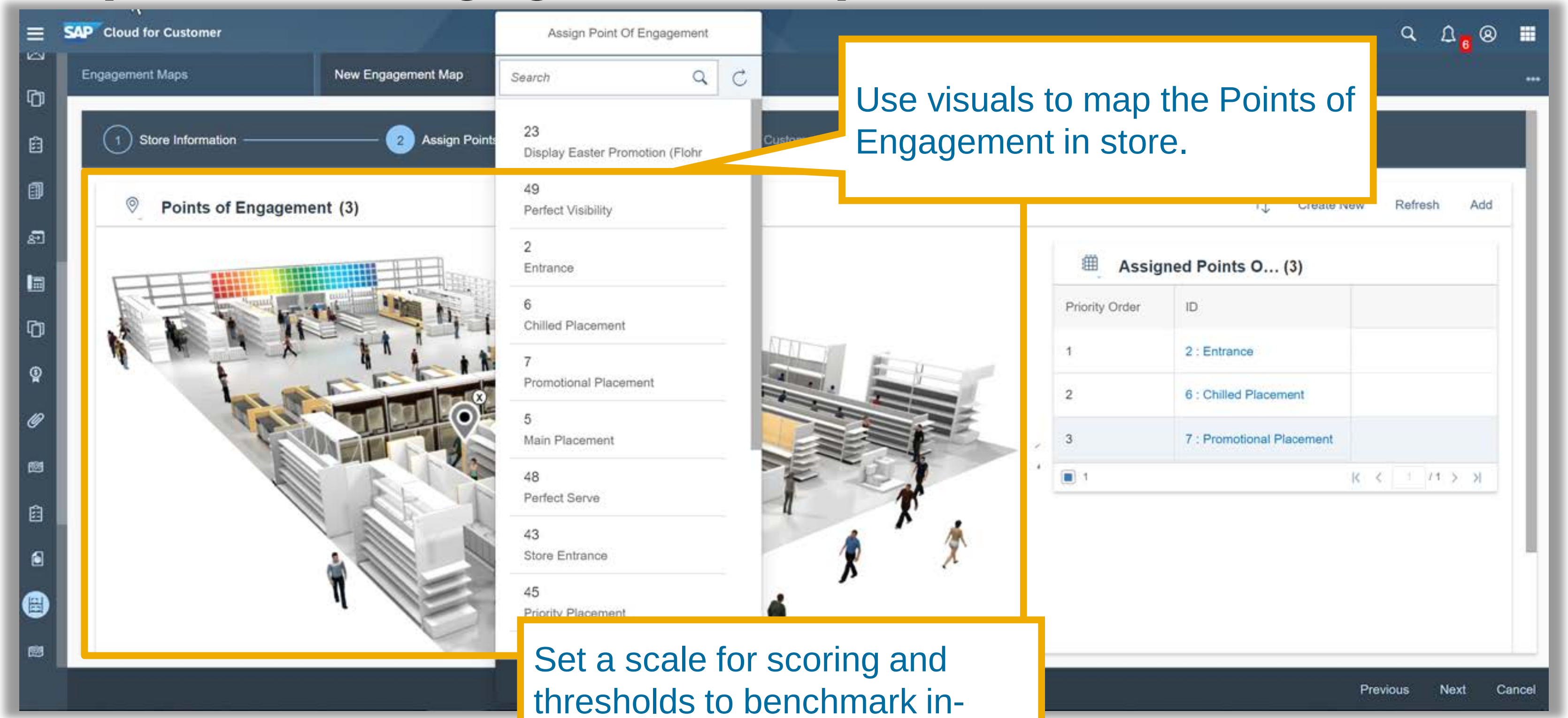
Key Business Benefits

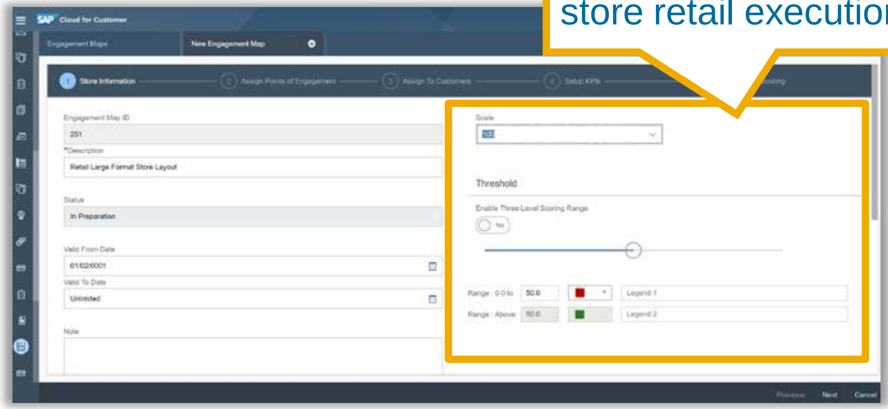
- Allows for targeted objective assignment and score assessments within stores

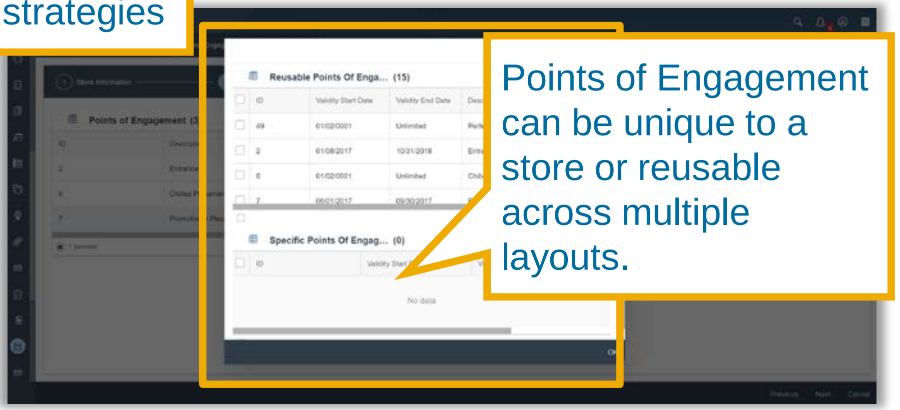
Set-up Details

- Currently an active PoE when used in a store layout / Engagement Map cannot be edited

Topic Area: Engagement Maps







Define store layouts or Engagement Maps(EM) and map the Points of Engagement (PoE) or displays/ promotional placements/assets in store

- Store layouts can be defined with multiple PoEs and assigned to a customer set
- Depending on the scoring methodology used (survey based store scoring), weightages can be given to PoEs for score aggregations.
- Thresholds set for an EM are valid for the benchmarking of overall store scores and scale set normalizes all store and KPI calculations (Options of 1,10 and 100)

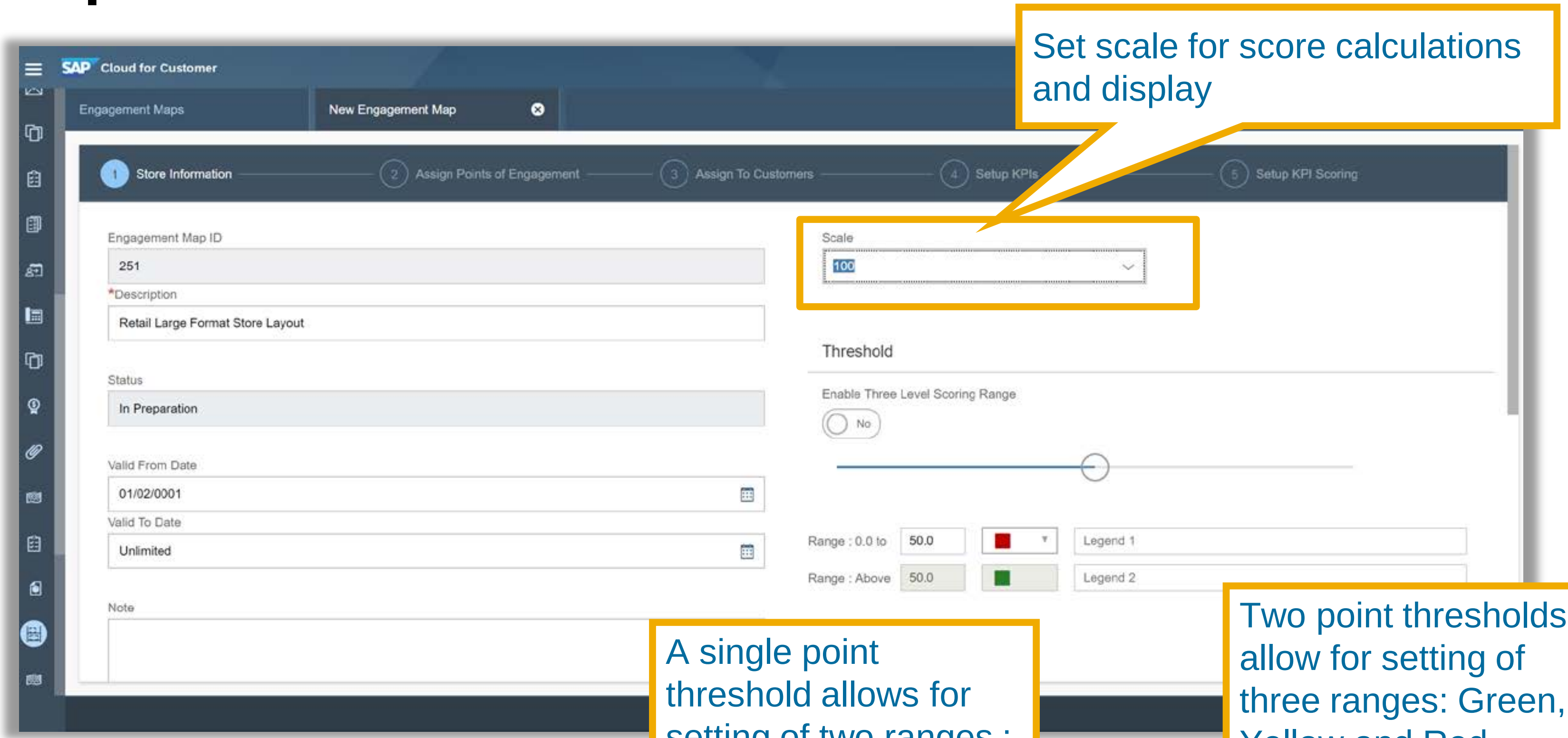
Key Business Benefits

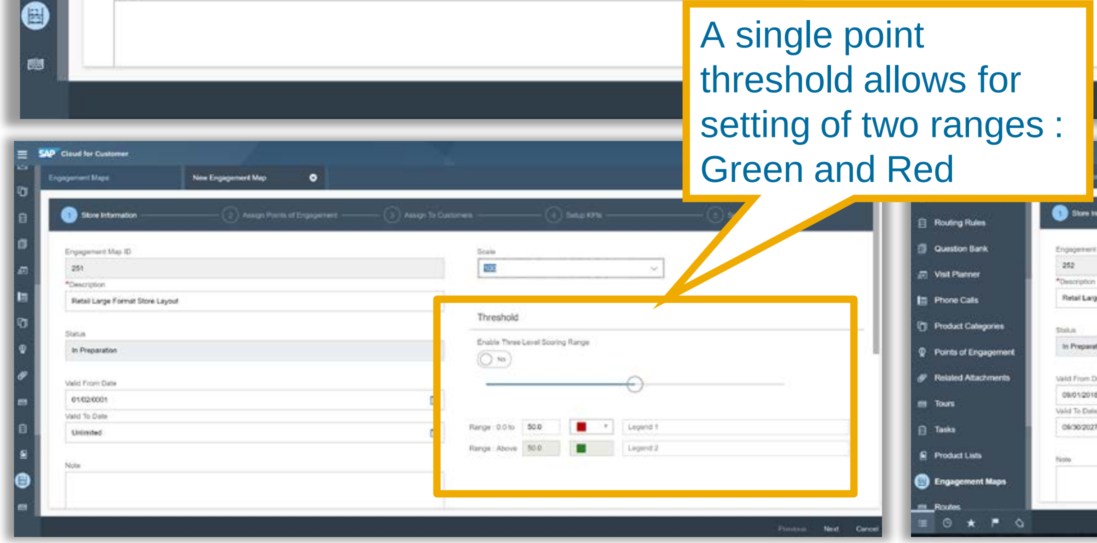
- Allows for definition of the store layouts and scoring methodology of overall store and KPI/metric measurements

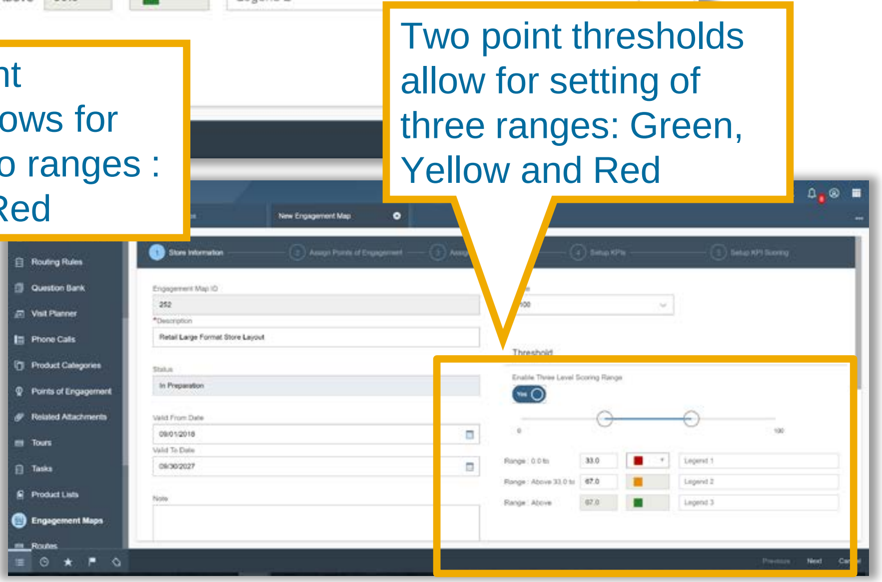
Set-up Details

- Currently an active EM when used in visit execution cannot be edited

Topic Area: Scale and Thresholds







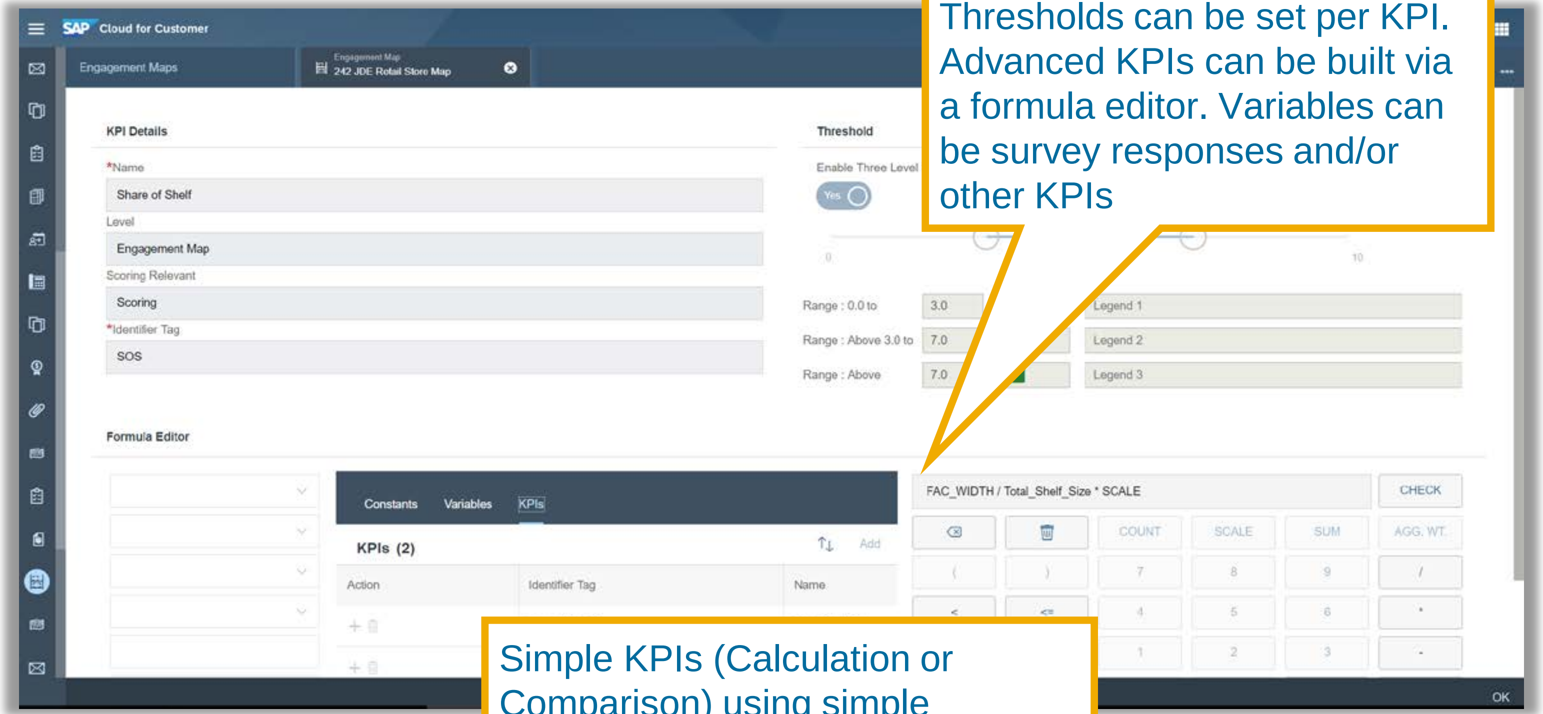
Setting of a scale and thresholds are part of definition of the scoring methodology

- Scale can be set for a store layout. Options are 1,10 OR 100. The scale allows for normalization of overall store score and KPI calculations. It also provides uniformity and intuitive score display.
- Thresholds can be set at a single or two points.
  - A single point threshold allows for two ranges in scores (GREEN and RED)
  - Two point thresholds allow for three ranges in scores (GREEN, YELLOW and RED)

Key Business Benefits

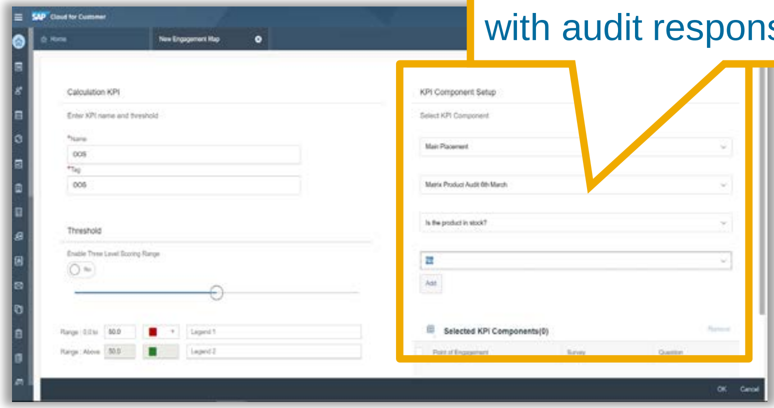
- Thresholds allow for the quantitative benchmarking of the qualitative store assessments (via store audits).

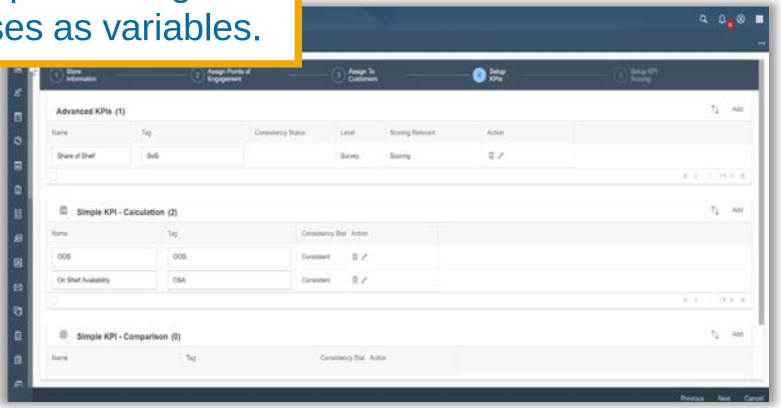
Topic Area: KPIs or Store Metrics



Thresholds can be set per KPI. Advanced KPIs can be built via a formula editor. Variables can be survey responses and/or other KPIs

Simple KPIs (Calculation or Comparison) using simple summation or comparison logic with audit responses as variables.





Build Simple KPIs using simple summation or comparison logic to build your metric. An example would be measuring ‘On Shelf Availability’, where a simple count of ‘specific’ responses to an audit is measured OR ‘Pricing Compliance’ where a simple count of audit responses as compared to a ‘desired’ value is measured. Shelf Price ‘X” should = Target Price ‘Y’.

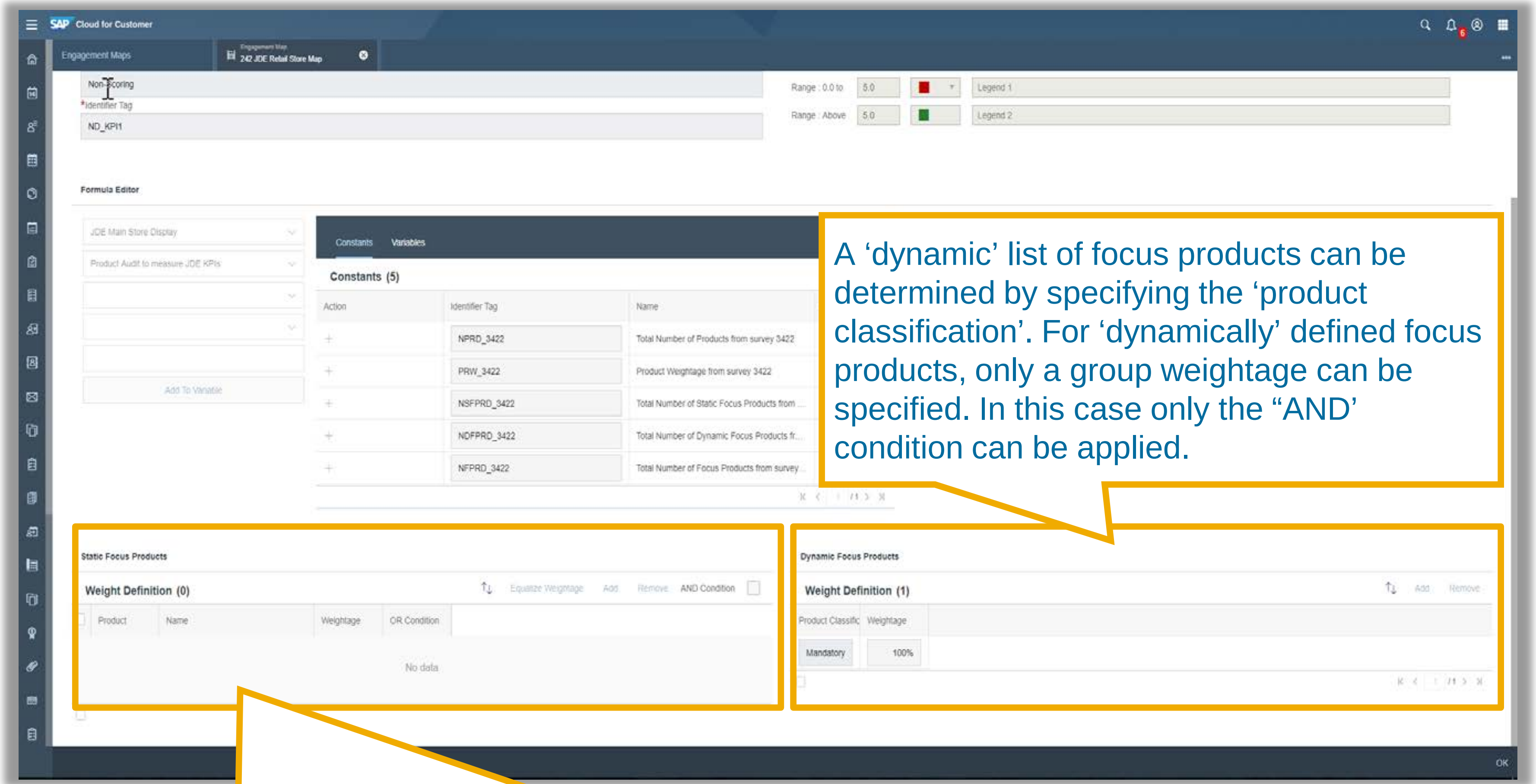
Flexible Formula Editor to Build Complex KPIs offers many operators and variables across audits to build flexible formulae to calculate complex metrics.

- Compounded KPIs further flexibility to the complex definition is provided by allowing you to build store KPIs using other KPIs in the formula. Example: OOS across store can be measured using average of (OOS1 measured for ‘mandatory’ products at PoE1 and OOS2 measured for ‘essential’ products at PoE2).

Key Business Benefits

- Retail execution strategies in store can be measured holistically through the measurement of specific metrics like OOS, OSA, Share of Shelf, etc.

Topic Area: Weighed focus products in KPI calculations



A ‘dynamic’ list of focus products can be determined by specifying the ‘product classification’. For ‘dynamically’ defined focus products, only a group weightage can be specified. In this case only the “AND” condition can be applied.

A ‘static’ list of ‘focus products’ can be defined for advance KPI calculations. Weightages can be assigned individually, and conditions for their consideration in the KPI calculations can also be defined. Conditions could be ‘AND’ which means all ‘focus products’ defined should be KPI compliant for the metric to be calculated. The ‘OR’ condition, allows for ANY One of the focus products to be KPI compliant for the metric to be calculated.

Distinct weightages can be given to individual/ a group of products while formulating a metric/ KPI.

- For example: when during the calculation of a KPI, the ‘hero’ product/s shall account for 70% of the weightage of the metric while other products in the audit accounts for the remaining 30% of the calculation of the metric

Key Business Benefits

- Definition of focus products and their weightage based metric calculations allow customers the flexibility to customize metric definitions to their business processes.

Topic Area: Survey based Store Scoring

Screen shot not yet available

You can use Survey based store scoring as an input into an aggregated store score.

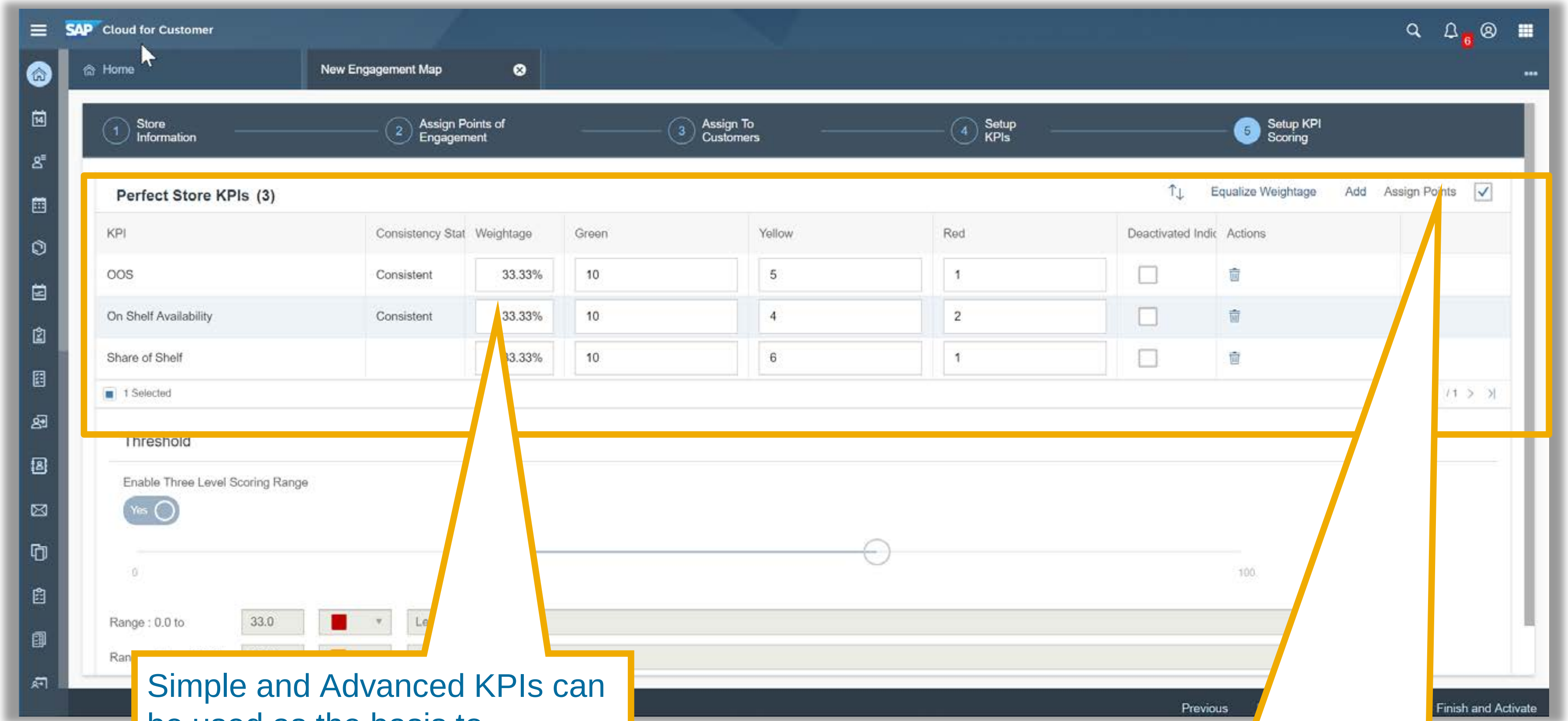
Key Business Benefits

- Store scoring methodology using **survey and PoE** weightages and scoring as the basis for store score aggregations.

Set-up Details

- Explicit BC configuration option to ‘enable survey based score scoring’

Topic Area: KPI based Store Scoring



Simple and Advanced KPIs can be used as the basis to measure store performance. Weightages can be assigned to build the required store score aggregations.

In addition to weightages, points can be assigned to a KPI threshold range. For example, 10 points if KPI 'OOS' falls in the 'green' range and 0 points if the same KPI falls in the 'red' range during visit execution. These points aggregate to the 'store' score.

The use of KPIs to measure Store Performance

- KPI based store scoring allows you to use the metrics you measure as the basis for the 'store score' Weightages and/or points can be assigned to the KPIs for score aggregations.

Key Business Benefits

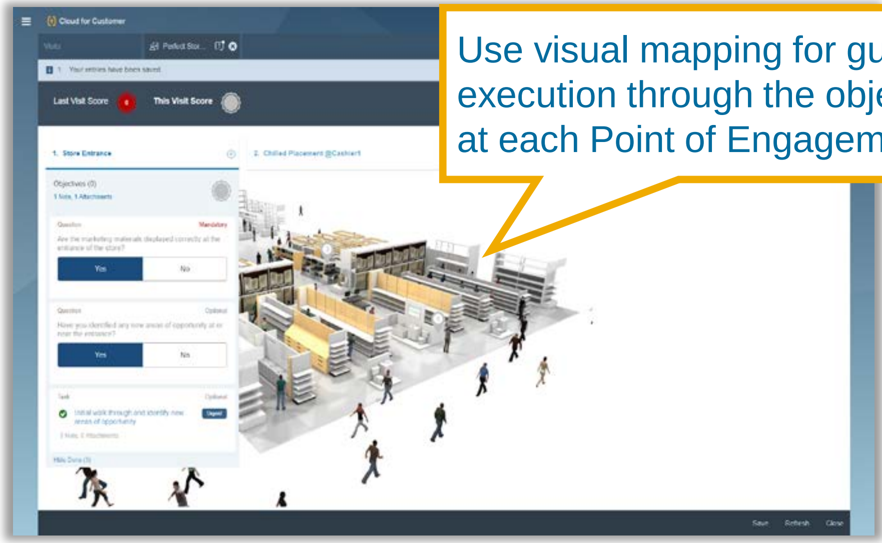
- Measuring specific store metrics and using that to measure store performance is a holistic store scoring methodology.

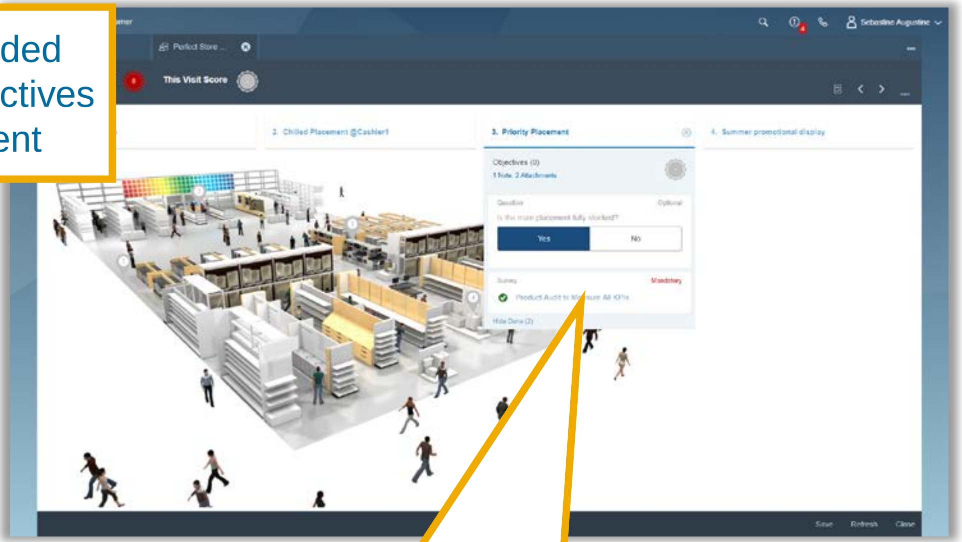
Set-up Details

- The KPI based store scoring methodology is provided as the default option. No added configuration necessary.

What’s New in
Perfect Store Execution

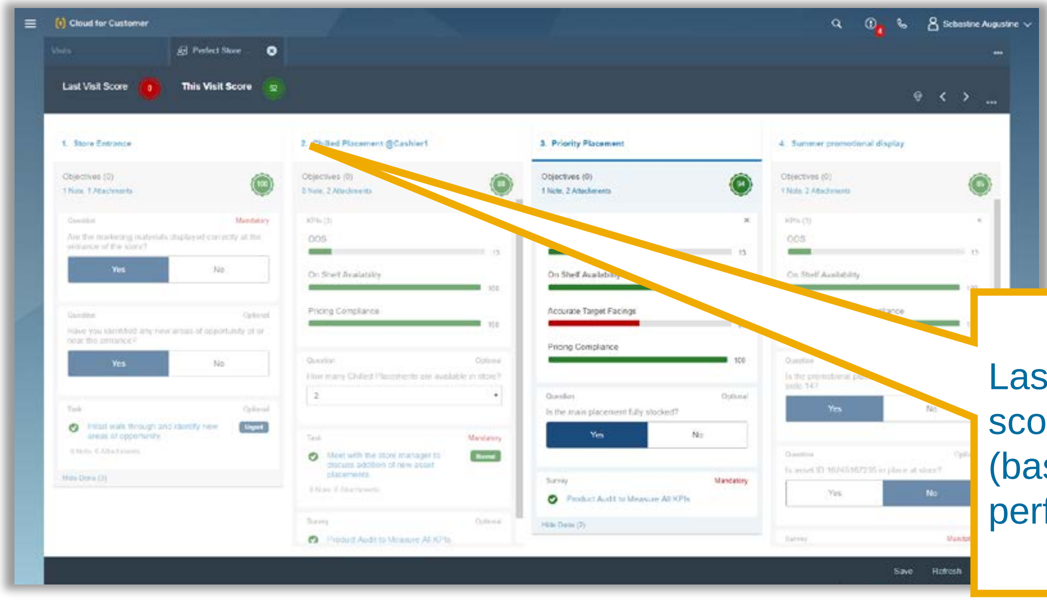
Topic Area: Perfect Store Visit execution





Use visual mapping for guided execution through the objectives at each Point of Engagement

Objectives can be surveys, questions and/or tasks. Swipe each card to ‘complete’ the objective



Last visit score, current store performance, PoE scores and KPI scores are all visually intuitive (based on thresholds set) to indicate performance levels.

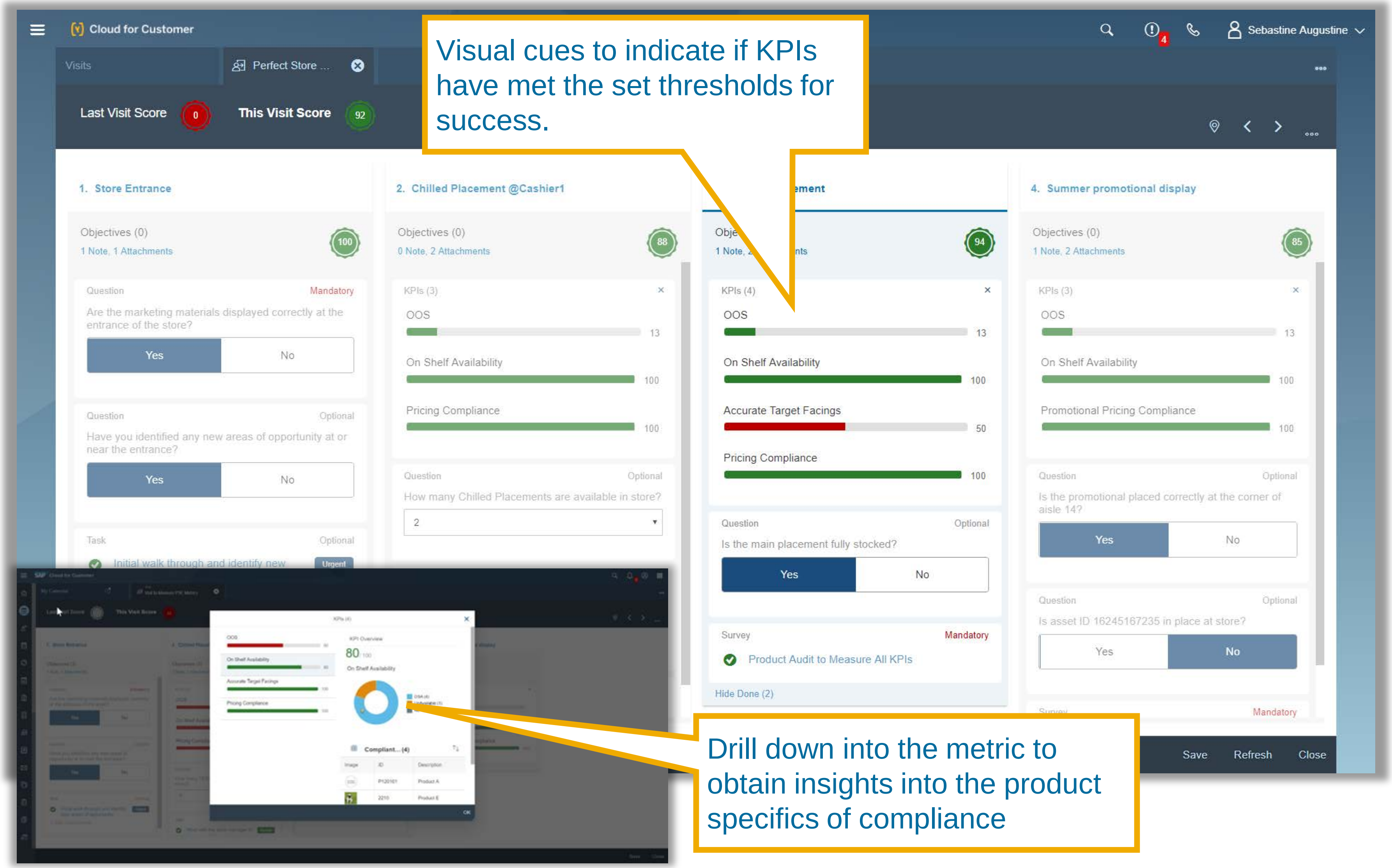
Optimized user experience for Perfect Store Execution

- Use visual engagement maps for guided execution.
- Execute on objectives at each Point of Engagement.
- On execution of objectives, use the option to score specific set KPIs or alternately the holistic store performance.

Key Business Benefits

- Qualitative assessments are converted into quantitative benchmarks with real-time insights of store performance for the in-store rep.

Topic Area: In-Store Metrics and Insights



KPIs or metrics can be measured in-store in real-time

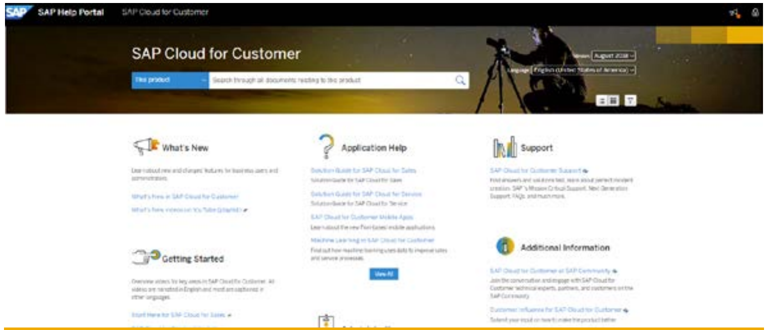
- In-store reps are provided with real-time insights into the various metrics defined at the back office
- Visual cues (KPI colors) indicate their adherence to set thresholds
- Further insights of specific products' compliance can be obtained on drill down. These insights make it possible for the sales rep to make the accurate corrective actions. Example: if On Shelf Availability is in the red, the drill down provides him with the list of non-compliant products which he can then effectively and efficiently stock the shelves with.

Key Business Benefits

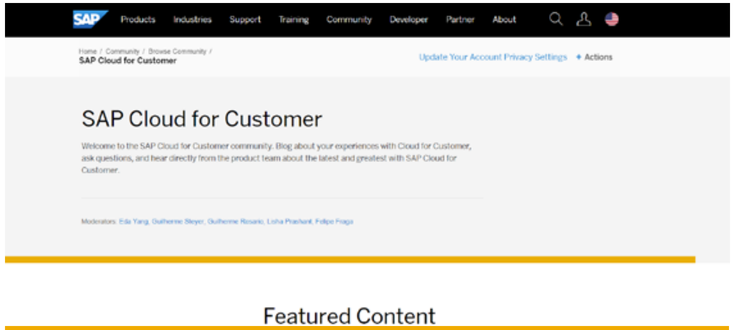
- Qualitative assessments are converted into quantitative benchmarks with real-time insights of store performance for the in-store rep.

Resources

Resources, Contact, Training and Engagement



[SAP Help Portal]



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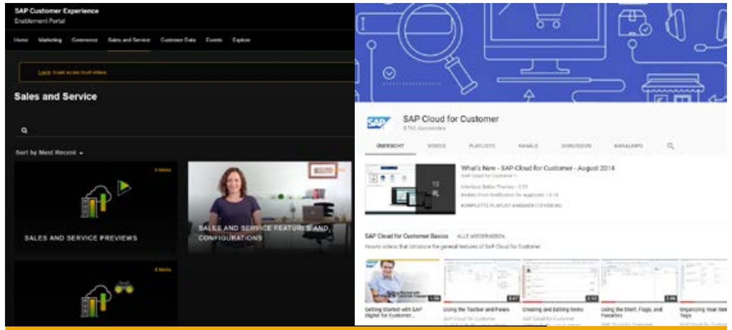
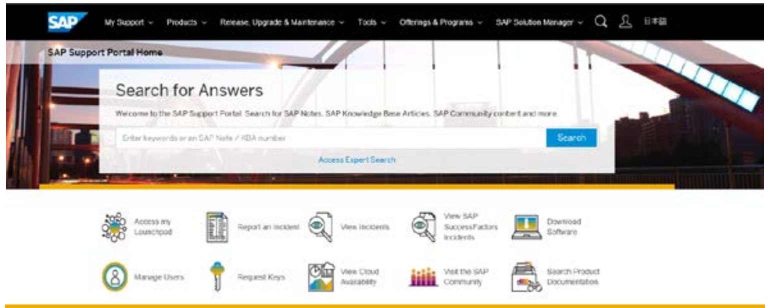


[Enable.cx] / [YouTube]



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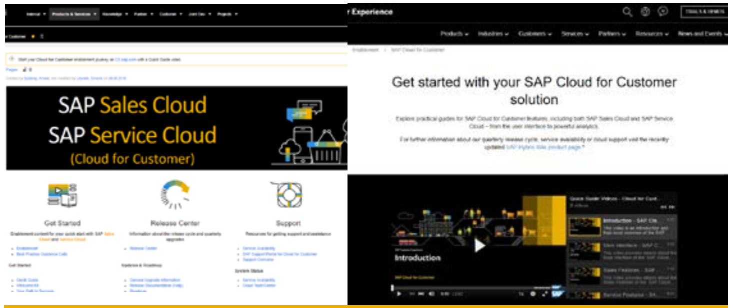
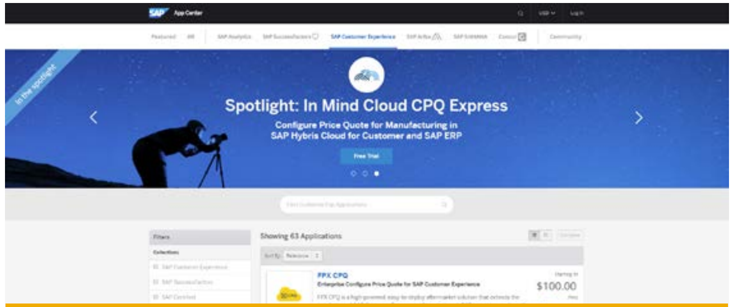


[SAP CX Wiki] / [cx.sap.com]



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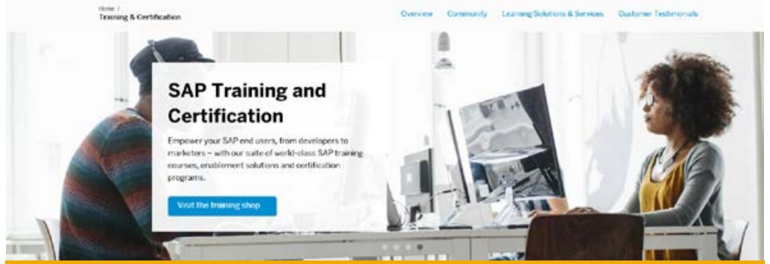
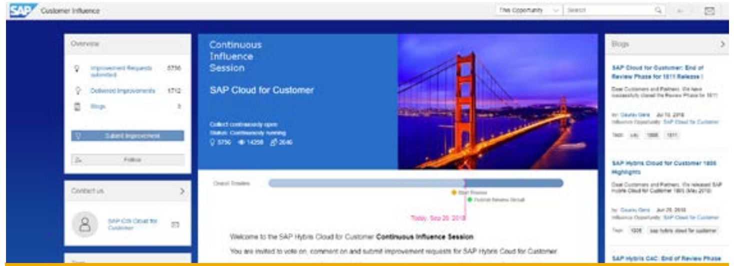


[SAP Training and Certification]



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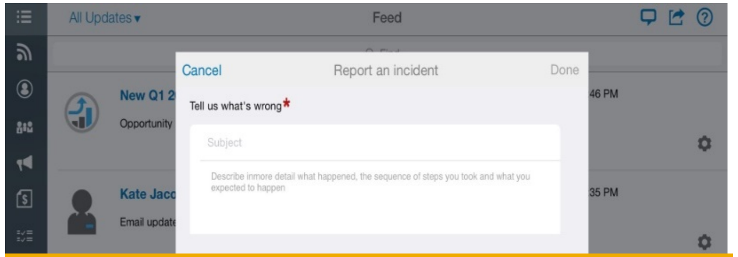

[Incident Management]
(Embedded in Your Tenant)

SAP Customer Experience

Thank you.

Contact information:

F name L name
Title
Address
Phone number

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