

SAP Cloud for Customer Sales and Service Release Preview Service

Version 18.11 (November)

SAP Customer Experience Product Management

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CUSTOMER



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SAP Customer Experience

In the SAP C/4HANA product portfolio

SAP C/4HANA

Unified experience

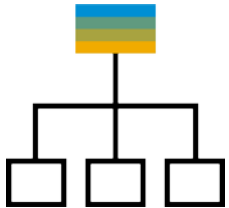
SAP Commerce Cloud

SAP Marketing Cloud

SAP Sales Cloud

SAP Service Cloud

Solutions for engagement center, self-service, customer service management, and field service



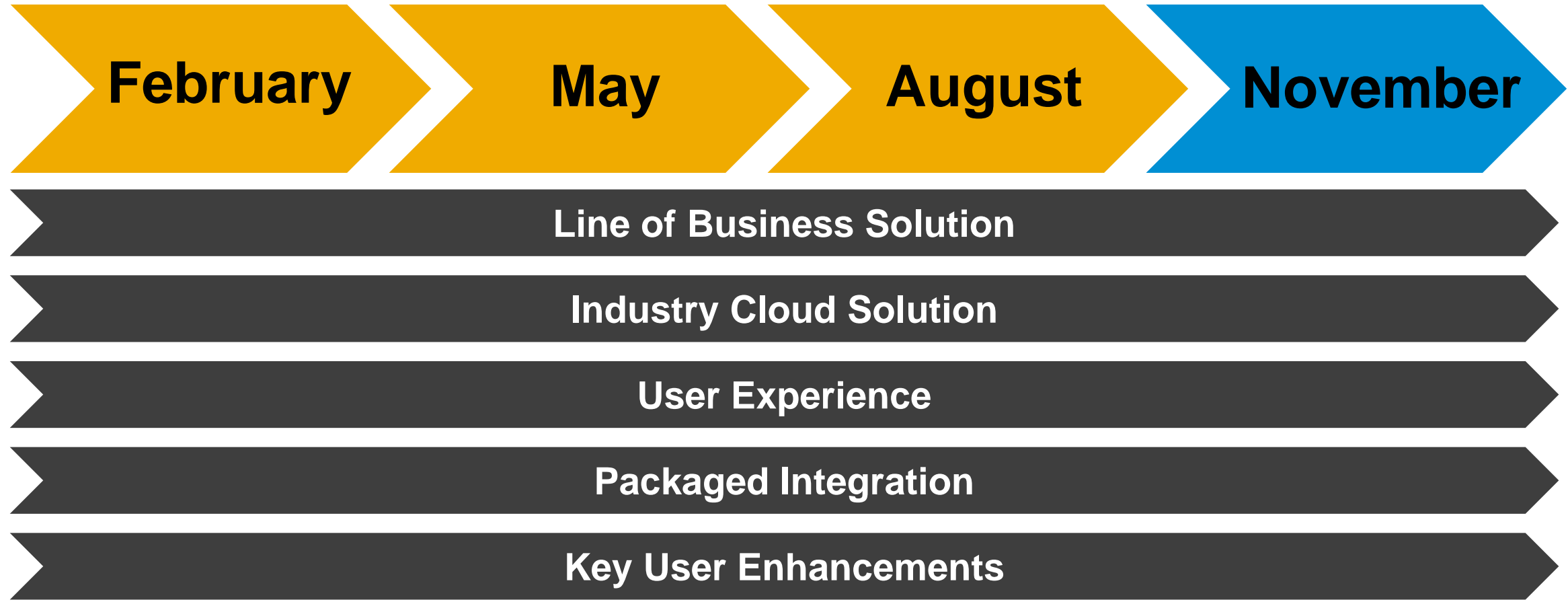
SAP Customer Data Cloud

SAP Cloud Platform

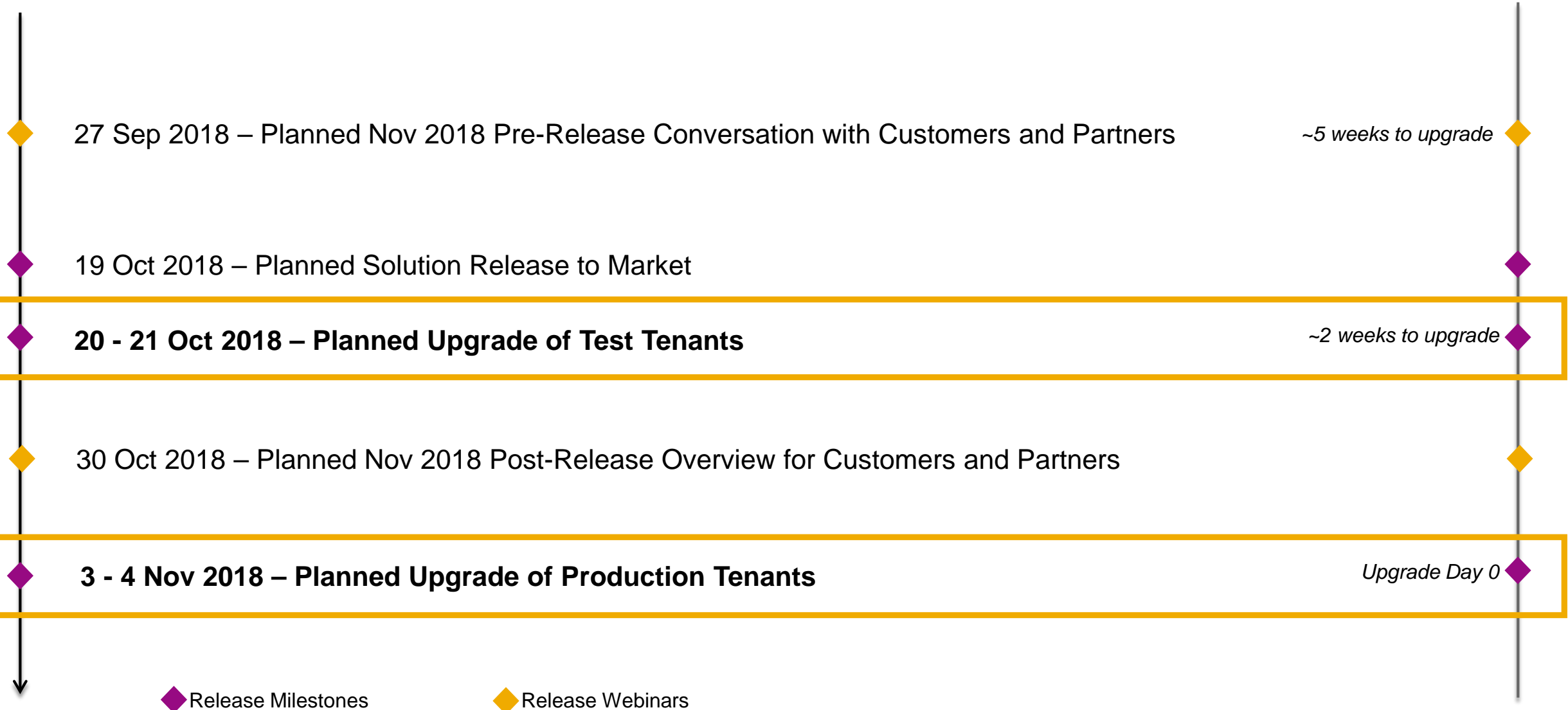
SAP S/4HANA

Enhanced and Updated on a Quarterly Schedule

SAP Cloud for Customer Innovation Cycle



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



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

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 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 (as 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 its 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) Windows 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 Windows 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

The screenshot shows the SAP Documentation interface for the **BusinessAttributeSet** entity type. The left sidebar lists various business objects, with **Attribute Set** expanded. The main content area displays the **BusinessAttributeSet** entity type details, including a diagram showing relationships with **BusinessAttributeSetAttributeAssignment** and **BusinessAttributeSetDescription**. Below the diagram, the **BusinessAttributeSetCollection** is described, and the **Entity Type Details** section is visible. A pop-up window titled **Create New BusinessAttributeSet** provides the following information:

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

Request

Sample Request (Create New BusinessAttributeSet)

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

Response

Sample Response

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

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

The screenshot displays the SAP Theme Settings interface. At the top, there is a navigation bar with a hamburger menu, the text 'Cloud for Customer', a search icon, an information icon, a phone icon, and a user profile icon for 'Eddie Smoke'. Below the navigation bar, there are two tabs: 'Home' and 'Theme Settings'. The 'Theme Settings' tab is active, showing a 'Select a theme' section. This section includes a sub-header 'The selected theme will apply across all devices for all users to best suit your brand image.' and four theme options: 'SAP Belize', 'SAP Belize Deep (published)', 'SAP Blue Crystal', and 'Custom Theme'. The 'SAP Blue Crystal' option is highlighted with a red border and has a 'Deprecated' label above it. Below the theme selection, there is a 'Device Preview - SAP Belize Deep' section showing a mobile phone, a laptop, and a tablet displaying the SAP interface with the Belize Deep theme. At the bottom right of the interface, the word 'Published' is visible.

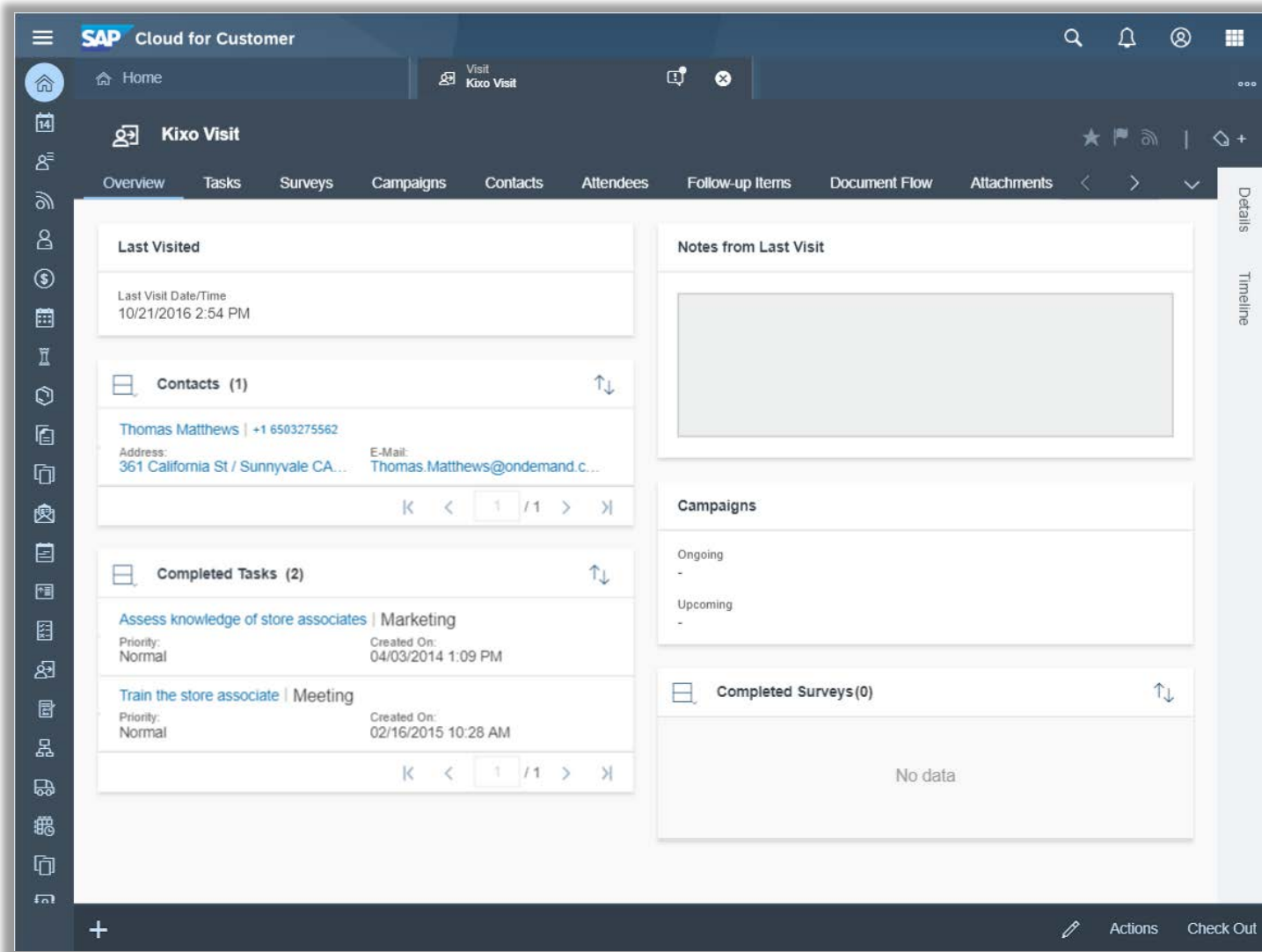
Blue Crystal Theme will soon be deprecated

- 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 subsections within the facets thereby reducing scrolling as sections flow upwards to reduce blank space

Key Business Benefits

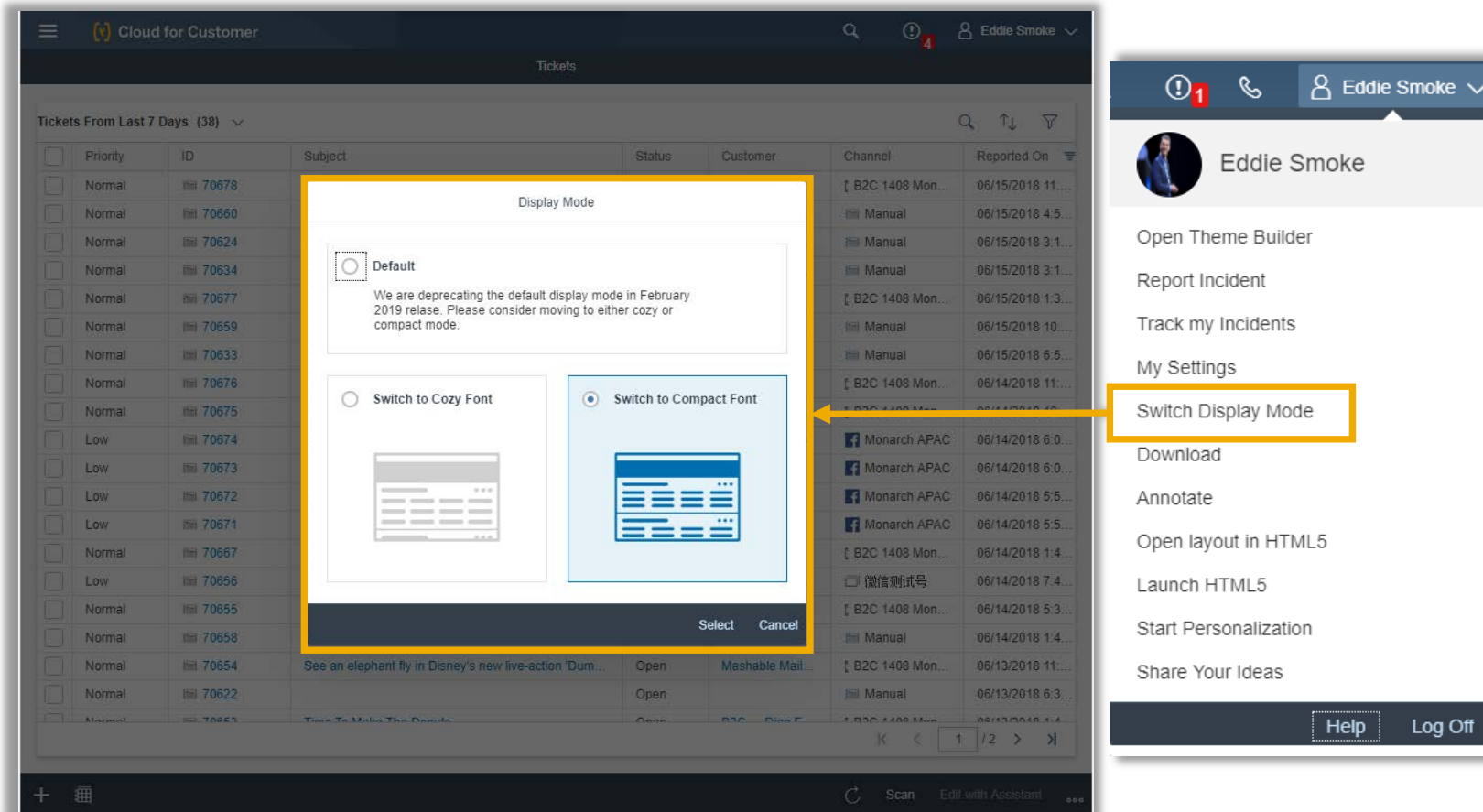
- Users can quickly scroll through the information on sections without having to do lot of vertical scrolling through the page.

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**

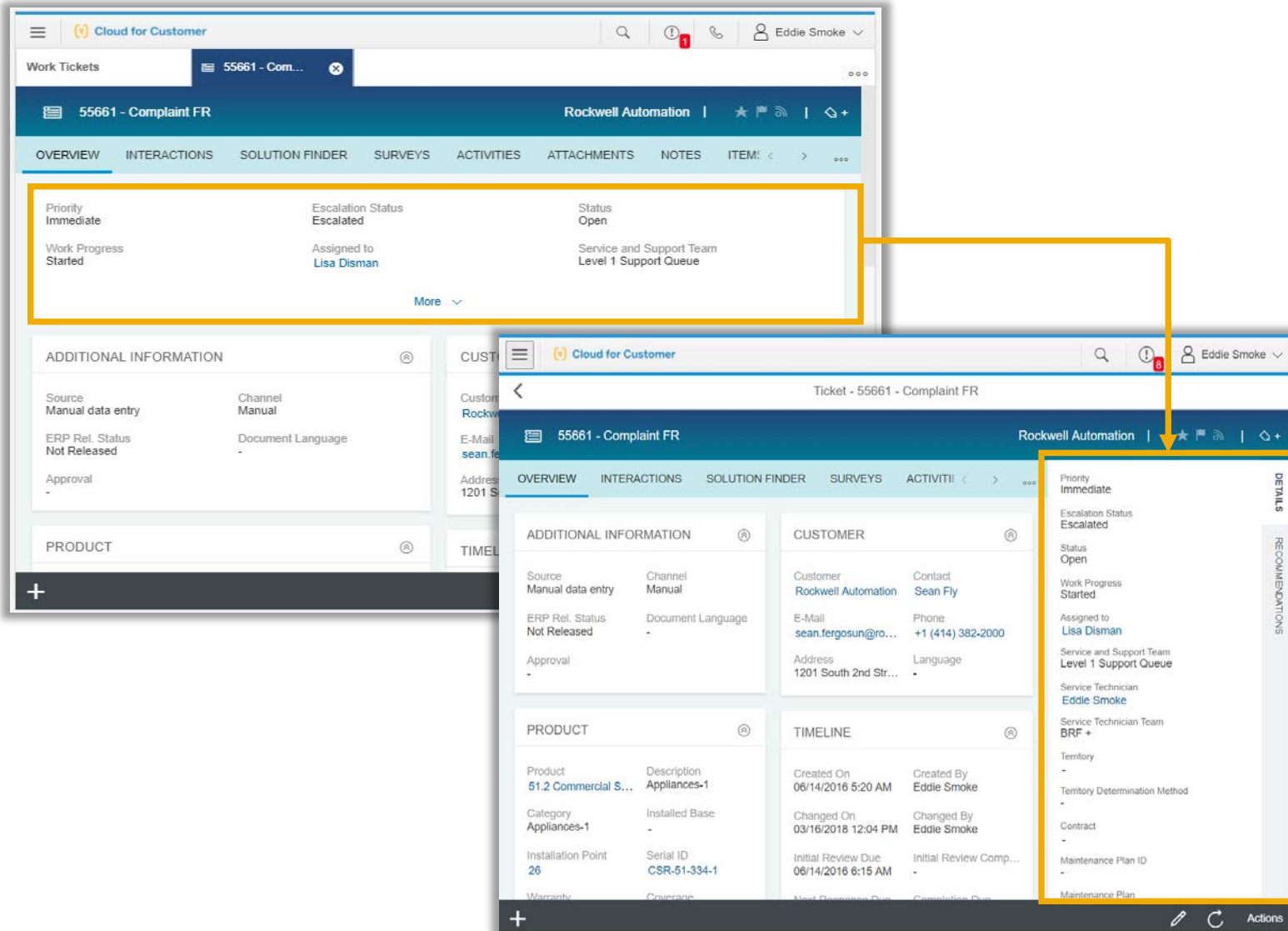
Key Business Benefits

- 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)

The image displays two screenshots of the SAP Fiori client interface. The top screenshot shows a standard list view of the 'PRODUCTS (14)' table in a Sales Order. The bottom screenshot shows the same table in a Master Detail Vertical Split layout, where the selected product (Line 10, Memory card) is expanded to show detailed information. Callout boxes highlight the 'Master List' and 'Master Detail Vertical Split layout' views, and a separate box points to the 'Master Detail Vertical Split icon' in the bottom-left corner of the table.

Master List

Master Detail Vertical Split layout

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

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

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

The screenshot displays the Fiori client interface for 'Work Tickets'. The left sidebar shows navigation options like Home, Calendar, Service, Tickets, Work Tickets (selected), Templates, Unassociated E-Mails, Territories, Live Activity Center, Ticket Hierarchy, Sales, Installed Base, Feed, and Assignments. The main content area shows a list of work tickets. The first ticket (ID 55661) has a 'Complaint' type and 'Rockwell Automation' as the customer. The second ticket (ID 35620) has a 'Service Request' type and 'Prime T' as the customer. The third ticket (ID 32013) has a 'Field Service (Z)' type and 'FutureVision' as the customer. The fourth ticket (ID 31705) has a 'Field Service (Z)' type and 'Ludovic Dumas' as the customer. Two callout boxes highlight specific links: 'Link to Main object' points to the ticket ID '55661', and 'Links to additional objects' points to the subject line 'Test Item Level invol...' of the second ticket. The interface also shows a search bar, filters, and a pagination control at the bottom.

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

Cloud for Customer

Tickets

Tickets From Last 7 Days (20)

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

Cloud for Customer

Unassociated E-Mails

All E-Mails (3588)

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

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

Home

Calendar

Service

Tickets

Work Tickets

Templates

Unassociated E-Mails

Territories

Live Activity Center

Ticket Hierarchy

Sales

Installed Base

Feed

Assignments

Checkboxes always enabled for multi-select list

No checkboxes for single select lists

Multi Selection checkboxes now enabled by default

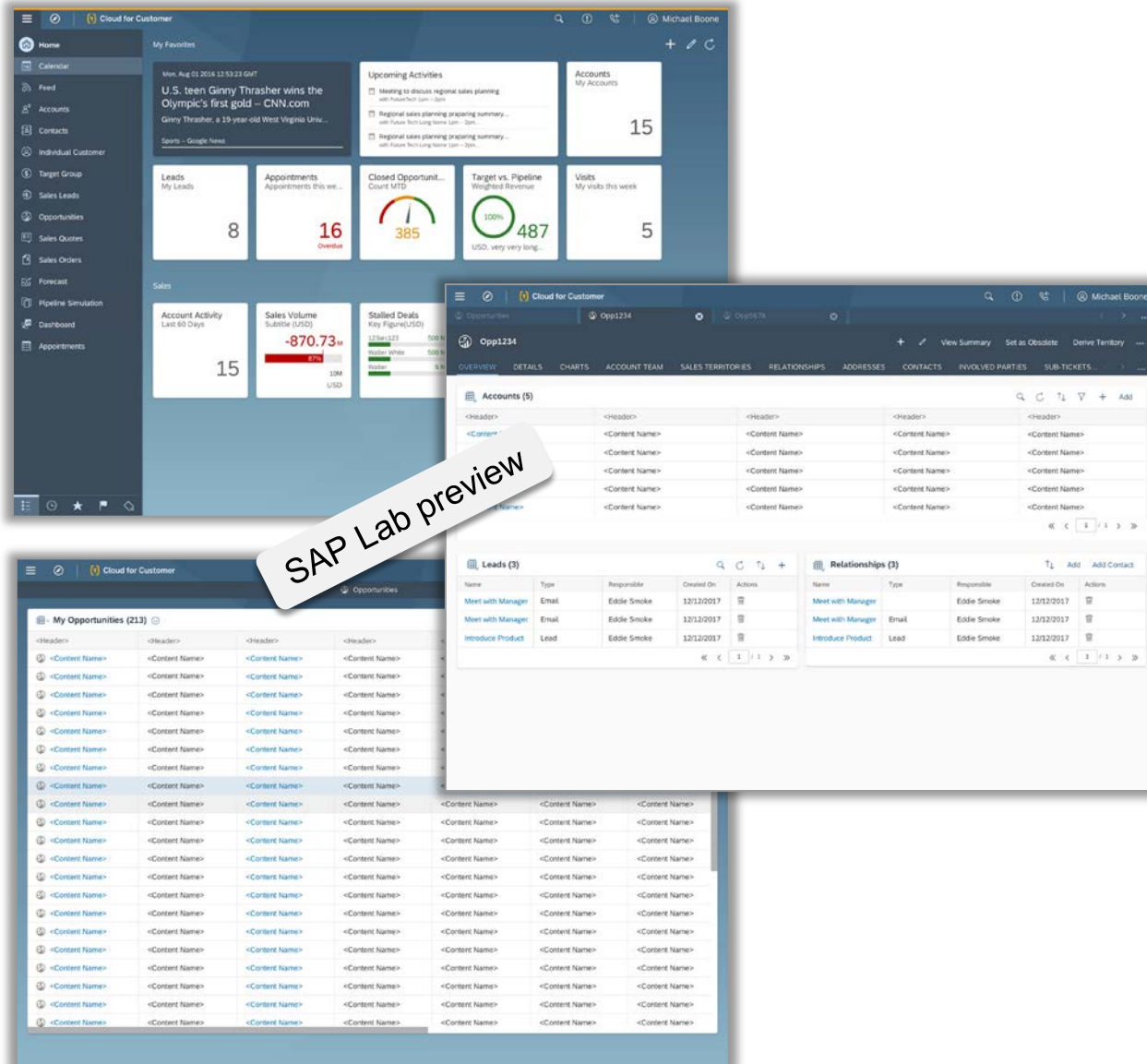
- Multi-Select checkboxes will now be visible always when the company setting is enabled.
- The selection toggle switch is then removed.
- For multi-select lists, checkboxes will be shown always. For Single select lists no checkboxes will be shown.

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.

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

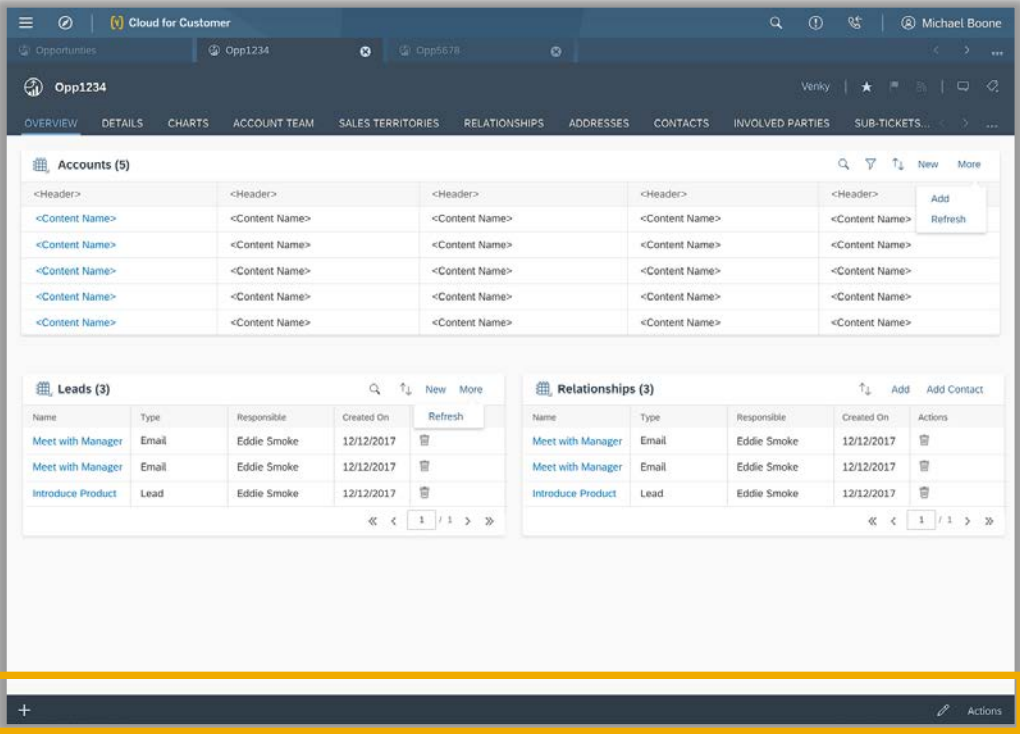
- Moving all actions to the top of page.
- Flattening out menus where needed especially for mobile devices in order to reduce number of clicks.

Key Business Benefit

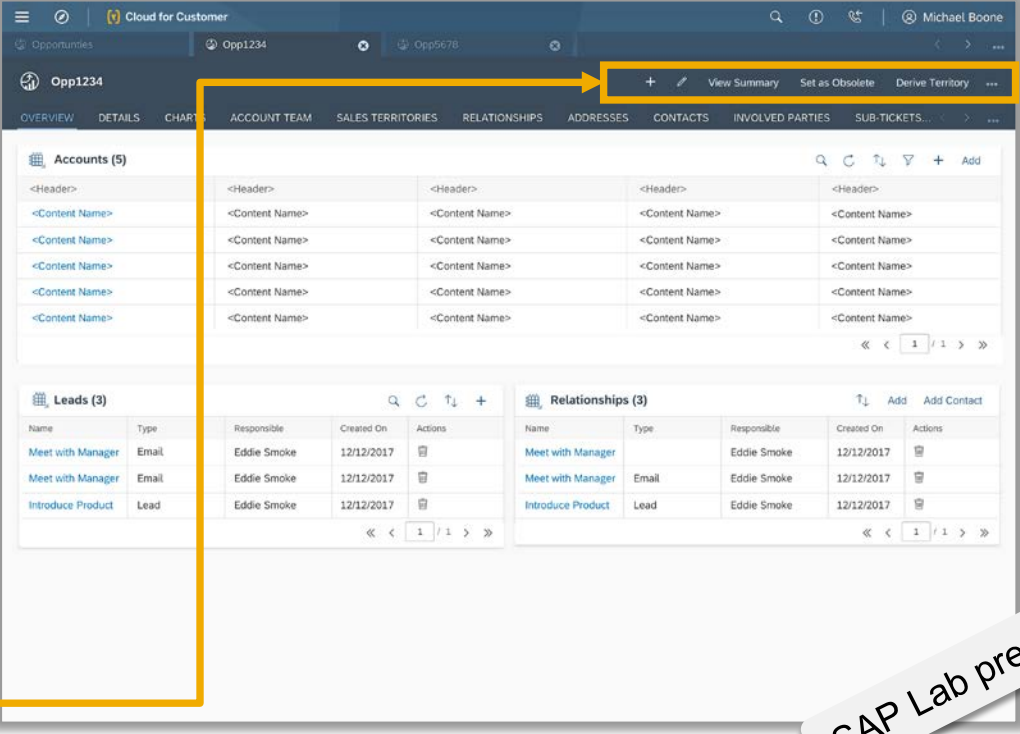
- Provide a consistent experience of how actions are placed across various application screens and across different device form factors.
- Reducing number of clicks by flattening out action menu items

Fiori Client Action Menu Enhancements – Further Details

Current



Proposed Design



Action Menu

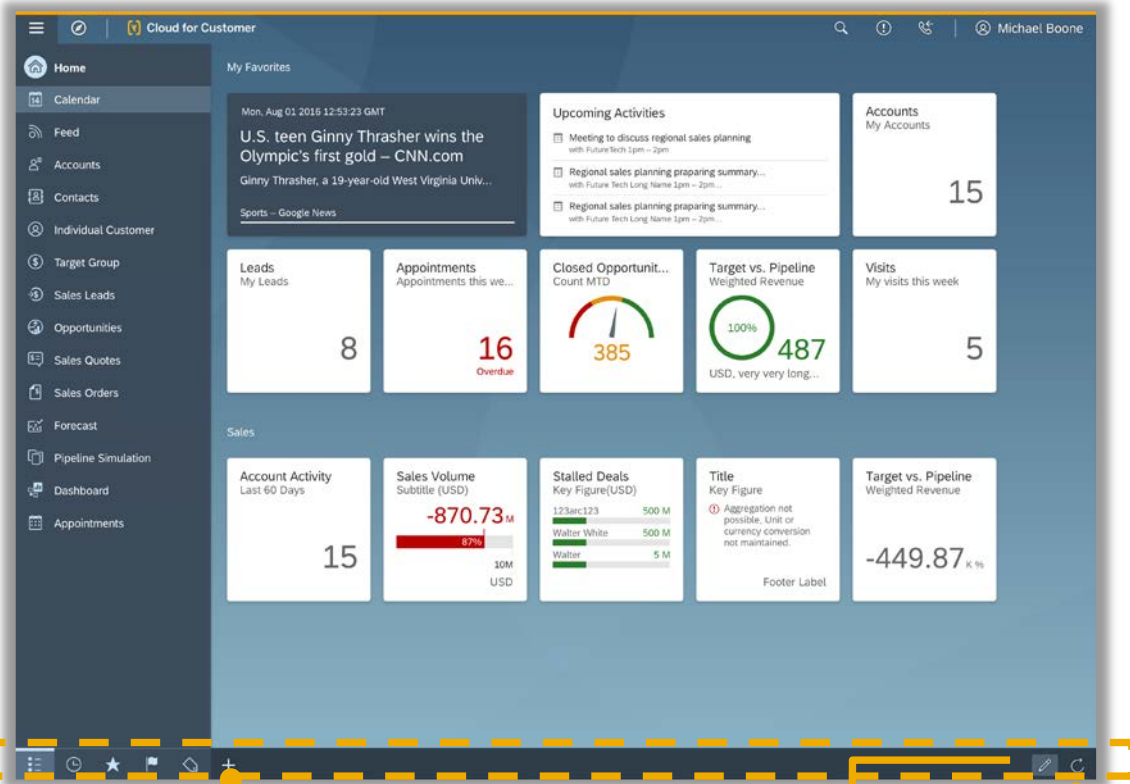
- Footer removed
- All actions moved to top right

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

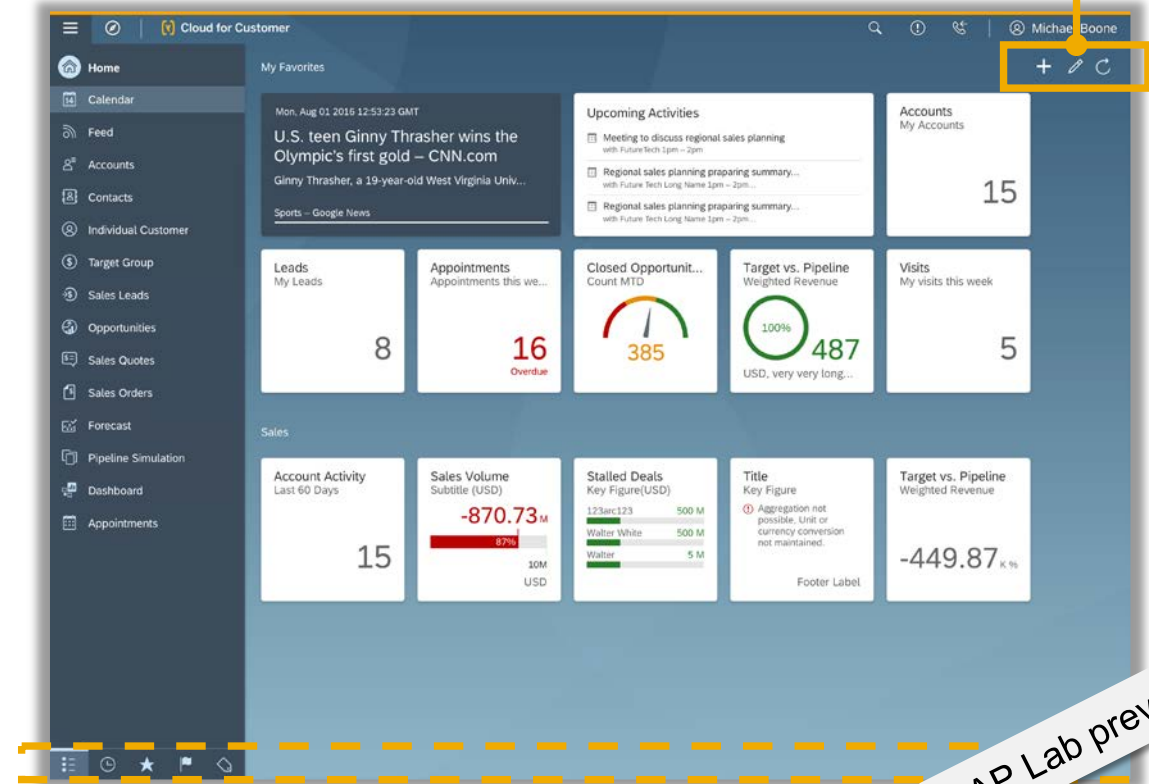


Global Create as + Button

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.

Footer is removed

SAP Lab preview

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.

The image compares the current and proposed designs for the Fiori Client Object List (OWL). The current design shows a table with a footer containing view switchers and a toolbar with list tools. The proposed design moves the view switcher and a new overflow menu to the top right toolbar, while the footer is removed. Annotations include: 'List Tools' pointing to the current toolbar; 'View Switcher' pointing to the new top-right toolbar; 'New Overflow' pointing to the new overflow menu; 'Refresh, as a List Tool' pointing to the refresh icon in the new toolbar; 'View Switcher' pointing to the current bottom-left view switcher; 'New, as + Button' pointing to the new plus button in the bottom-left; and 'Overflow Refresh' pointing to the refresh icon in the current bottom-left overflow menu.

Current

Proposed Design

List Tools

View Switcher

Refresh, as a List Tool

New Overflow

View Switcher

New, as + Button

Overflow Refresh

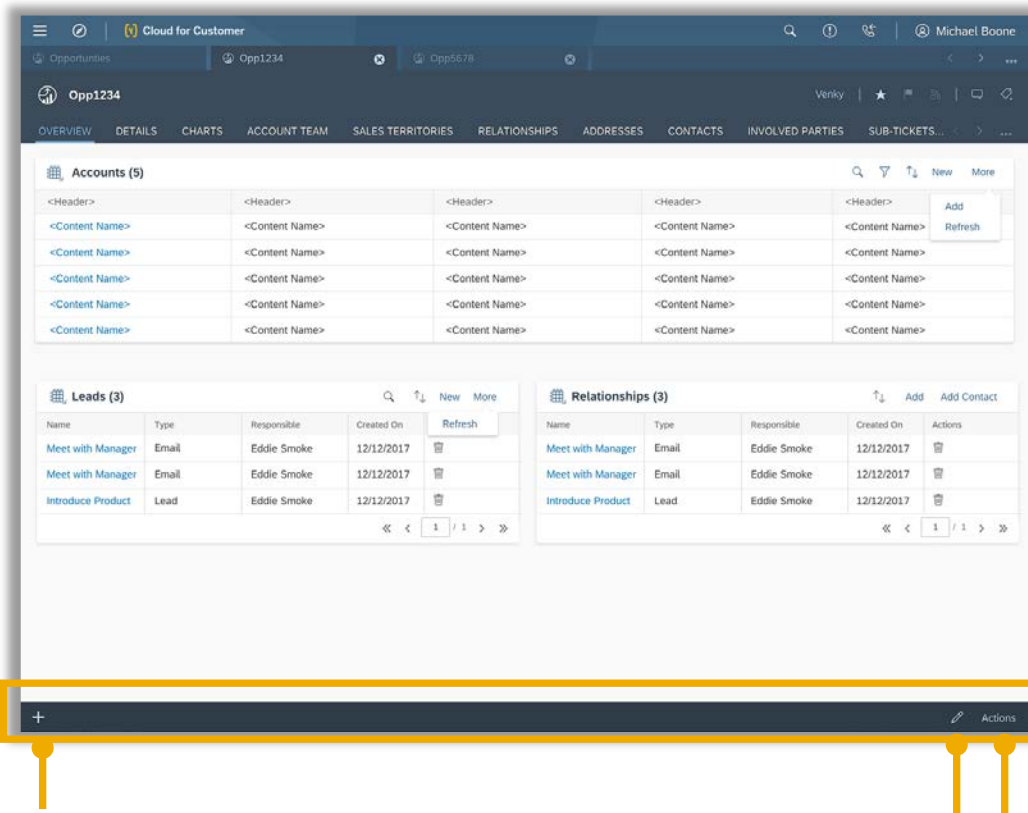
SAP Lab preview

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.

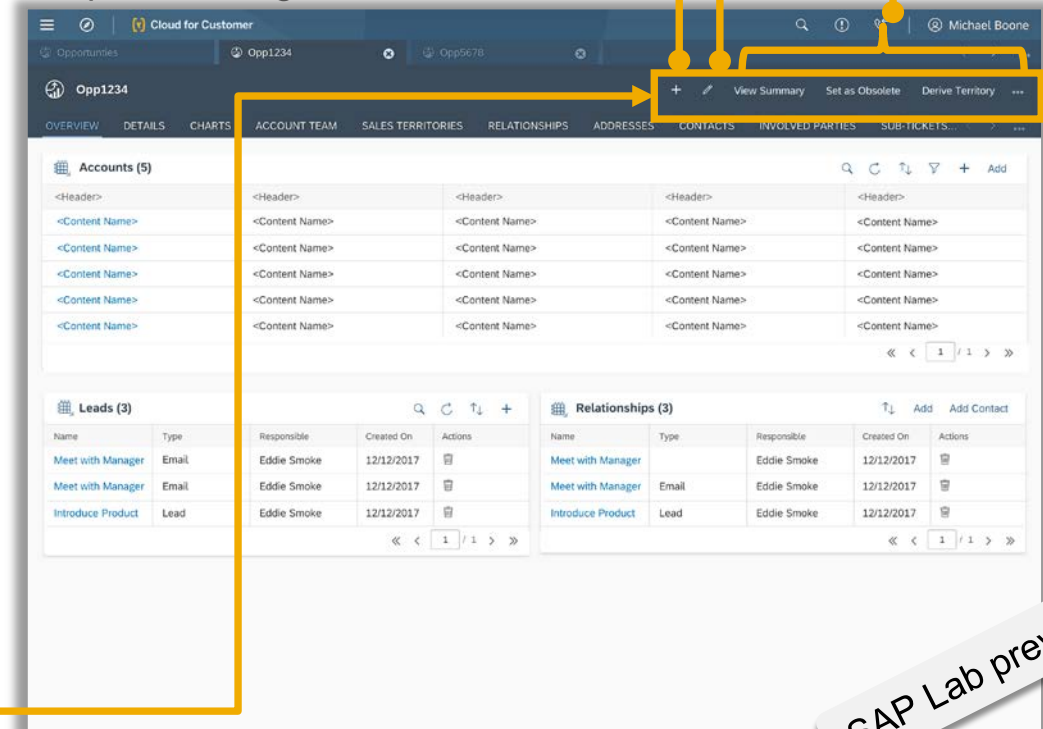
Current



Contextual Create

Edit Actions Menu

Proposed Design



Create

Edit

Other Actions

SAP Lab preview

SAP Cloud for Service

What's new in 18.11?

Service Topic Overview

- **Live Activity/CTI**
- **Communication Channels**
- **Service Management and Ticketing**
- **Machine Learning**
- **Installed Base**
- **Registered Products**
- **Installation Points**
- **Contracts**
- **Industry/Utilities**

What's New in **Live Activity/CTI**



What's New in 1811 for Live Activity/CTI

Key Innovations

Live Activity

- Chat - Feature parity
- Employee Scenario Chat availability
- Enable Contracts in Live activity

CTI

- New BP search in Search results action
- Search – Enable Category Filter
- Enable customer identification based on personal address related phone numbers
- Click to Call - Default Search results – Same as Inbound

Chat – Support Chat in Live Activity HTML5 Parity

Customer identified by email id

After ending the chat, Chat activity stored.

Business Description of Feature

- Chat feature which was available in HTML5 is now also available with Fiori Client.
- The feature set and the integration options remain the same (screen pop, caller ID)
- Chat Content can be pushed into C4C as an interaction.
- Available with CTI and Widget based approach

Key Business Benefits

- Chat functionalities also available on Fiori Client.
- Tickets can be created based on the chat content.
- Chat conversations are stored in the transcript.

Chat – Employee Support Scenario

The screenshot displays the SAP Cloud for Customer interface. On the left is a navigation menu with options like Home, Calendar, Feed, People, Activities, Analysis, Library, Activity Planner, Surveys, Data Workbench, and Service. The 'Tickets' section is highlighted. The main area shows a table of tickets from the last 30 days. A chat window is open on the right, showing a conversation with Carl Lewis (viswajith@gmail.com). The chat window includes a 'Simple Push Message' and a 'Socket Based Demo' section, followed by a 'Chat Window' section with a message from the customer and a response from the employee. The chat window also has a 'Type Here' input field and an 'End Chat' button.

Priority	Type	ID	Subject	Status	Source	Emp
Normal	HR Direct Ticket	421	dsffdsdf	Open	Manual dat...	Paul
Normal	HR Direct Ticket	414	dsffdsdf	Open	Manual dat...	Paul
Normal	HR Direct Ticket	387	Test from Portal	Open	Manual dat...	Paul
Normal	Finance Support Ticket	404	Help MRP	Open	Manual dat...	Paul
Normal	HR Direct Ticket	403	HR Help MRP	Open	Manual dat...	Paul
Normal	HR Direct Ticket	395		Open	Manual dat...	Paul
Normal	HR Direct Ticket	402	Fwd: Extend my Paternity Leave	Open	E-Mail	Paul
Normal	HR Direct Ticket	394	Creating a HR Ticket from the portal during th...	Open	Manual dat...	Paul
Normal	Procurement Support Ticket	377	Creating a procurement ticket prepping for th...	Open	Manual dat...	Paul
Normal	Finance Support Ticket	360	Creating a Finance Ticket Prep for the Demo	Open	Manual dat...	Paul
Normal	HR Direct Ticket	401	Extend my Paternity Leave	Open	E-Mail	Paul
Normal	Procurement Support Ticket	375	Procurement Ticket	Open	Manual dat...	Paul
Normal	Finance Support Ticket	358	Creating a Finance Ticket from Server - Viswa	Open	Manual dat...	Paul
Normal	HR Direct Ticket	370	Creating a HR Ticket from Server - Viswa	Open	Manual dat...	Davi
Normal	Procurement Support Ticket	356	11 PM Proc ticket 2	Open	Manual dat...	Paul
Normal	HR Direct Ticket	385	11 PM HR ticket 2	Open	Manual dat...	Mike
Normal	Finance Support Ticket	383	11 pm fin ticket	Open	Manual dat...	Shir
Normal	HR Direct Ticket	381	From server HR Ticket no 2	Open	Manual dat...	Paul
Normal	HR Direct Ticket	353	localhost HR direct 99	Open	Manual dat...	Jess
Normal	Finance Support Ticket	361	localhost fin direct	Open	Manual dat...	Paul Michael Adams
Normal	Finance Support Ticket	348	localhost proc direct	Open	Manual dat...	Paul Michael Adams
Normal	HR Direct Ticket	352	localhost HR direct	Open	Manual dat...	Nancy Nash
Normal	Procurement Support Ticket	346	Procurement - 1	Open	Manual dat...	Jessie Wilson
Normal	Finance Support Ticket	351	PROC ticket	Open	Manual dat...	Paul Michael Adams
Normal	Procurement Support Ticket	345	iphone not recieved	Open	Manual dat...	Paul Michael Adams
Normal	Finance Support Ticket	309	Test ::: Fin Ticket from ct	Open	Manual dat...	Shirley Nielson
Normal	Finance Support Ticket	308	iPhone order not received	Open	Manual dat...	Paul Michael Adams
Normal	Finance Support Ticket	344	Accruals not validated	Open	Manual dat...	Paul Michael Adams
Normal	HR Direct Ticket	299	Leave not recorded	Open	Manual dat...	Paul Price
Normal	Finance Support Ticket	306	Proc Direct	Open	Manual dat...	Paul Michael Adams

Business Description of Feature

- Chat enabled in Live Activity for Employee Support Scenarios.
- Chat happens in an external third party chat client and then can be pushed to Service Cloud for Employee Pop up and saving the Chat Transcript

Key Business Benefits

- Employee Support Customers can also use Chat Feature.
- Contextual response options.

Chat Activity

Example -

http://localhost:36729/?CID=BCM1234&Event=CHAT_ALLOCATED&Email=example@example.com&ExternalReferenceID=1234567

Attribute Name	Mandatory	Allowed Values	Description/Changes
CID	Yes (For CTI Adapter Only)	*	
Event	Yes	CHAT_ALLOCATED CHAT_CONNECTED CHAT_DISCONNECTED	
Email	Yes	valid email address	Used to identify customer if BP ID is not passed
ExternalReferenceID	Yes		Should be stored as BTID reference.
Transcript			Stored in chat activity
BP			Customer Identified.

Chat in RUI

This screenshot shows the SAP RUI interface with a call information panel on the left and a 'Multiple Possible Callers' popup on the right. The call information panel displays details for Kiran V Karadi, including contact information and activity type. The popup shows the customer's name and email address, and an agent's response.

Caller Kiran V Karadi confirmed. | Your entries have been saved.

All Categories [x] Default Search from Incoming Call Parameters

Kiran V Karadi
Changed On: 11/21/2017 03:27 PM PST Phone: - E-Mail: kiran.karadi@sap.com Address: -
ABC Classification: -

Kiran V Karadi
Changed On: 11/21/2017 03:27 PM PST Phone: - E-Mail: kiran.karadi@sap.com Address: -
ABC Classification: -

Kiran Karadi
Changed On: 09/11/2017 04:09 PM PST Phone: +1 408-398-9646 E-Mail: kiran.karadi@sap.com Address: US
ABC Classification: -

Dr. Kiran Karadi Contact
Changed On: 06/06/2018 12:22 PM PST Name: Karadi Contact, Kiran Account: SAP Portal B2B Corp Acct Function: Business Manager
Department: Service Dept Phone: +1 408-946-6669

Call Information

Chat From: kiran.karadi@sap.com
Name: Kiran V Karadi
Subject: Chat From: kiran.karadi@sap.com
Ticket ID: -
Serial Number: -
MyCustomField: -
Priority: Normal
*Activity Type: Chat
Kiran Email Act Ext Field: Hello Email
Call Recording Link Ext: http://google.com
Notes: -

Linked Ticket ID: -
Account ID: -
External ID: 10896332
Ext Field: smartphone
Created On: 09/24/2018 12:11 PM
Ext Checkbox:
Call Duration Ext: 1:00 AM

Multiple Possible Callers
kiran.karadi@sap.com
Kiran
Hello
Agent
Wait a sec pls
Type Here End Chat Close

Customer identified by email id

This screenshot shows the SAP RUI interface with a chat transcript panel on the left and a 'Multiple Possible Callers' popup on the right. The chat transcript panel displays the chat history, including the customer's message and the agent's response. The popup shows the customer's name and email address, and the chat window status.

Home Live Activity Center Customer Kiran V Karadi Ticket 6426 - Negative Sentiment Chat Activity Chat From: kiran.karadi@sap.com

Chat From: kiran.karadi@sap.com

Overview

Transcript

Kiran : Hello Agent : Wait a sec pls Kiran : Any updates on my shipping delay? Agent : Checking.. pls wait Agent : coming in 2 days

Notes

-

ID: 53
Subject: Chat From: kiran.karadi@sap.com
Created On: 09/24/2018 12:11 PM PST
Completed On: -
Status: Open
Priority: Normal

Multiple Possible Callers
kiran.karadi@sap.com
Chat Window
Customer Window
Waiting for incoming chat
Close

After ending the chat, Chat activity stored.

CTI - New BP search in Search results action

Use Case - Trigger Second Search

As an Agent, I should be able to trigger second search for a business partner in search results

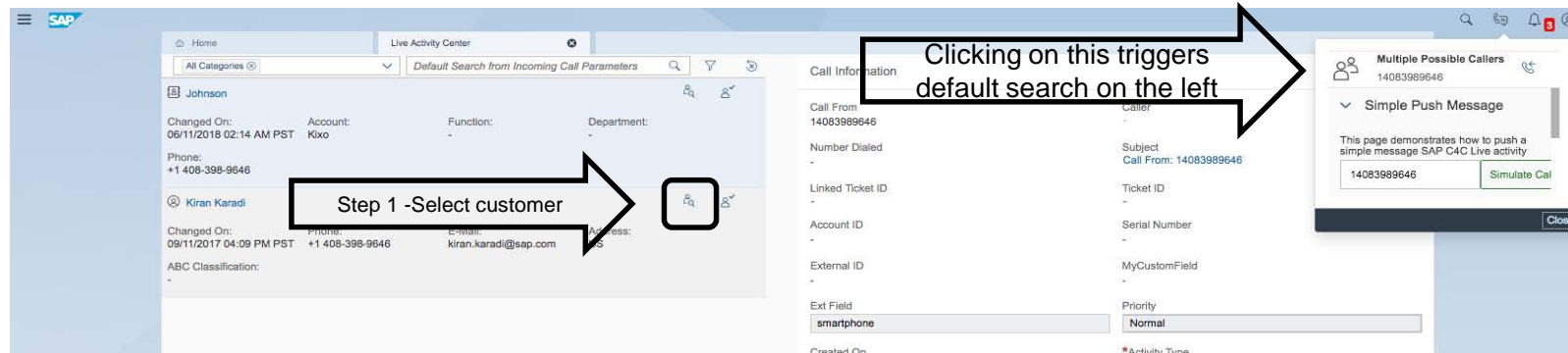
Why is this needed?

Multiple caller scenario - Need a way to do know more about the each caller.

Solution Details

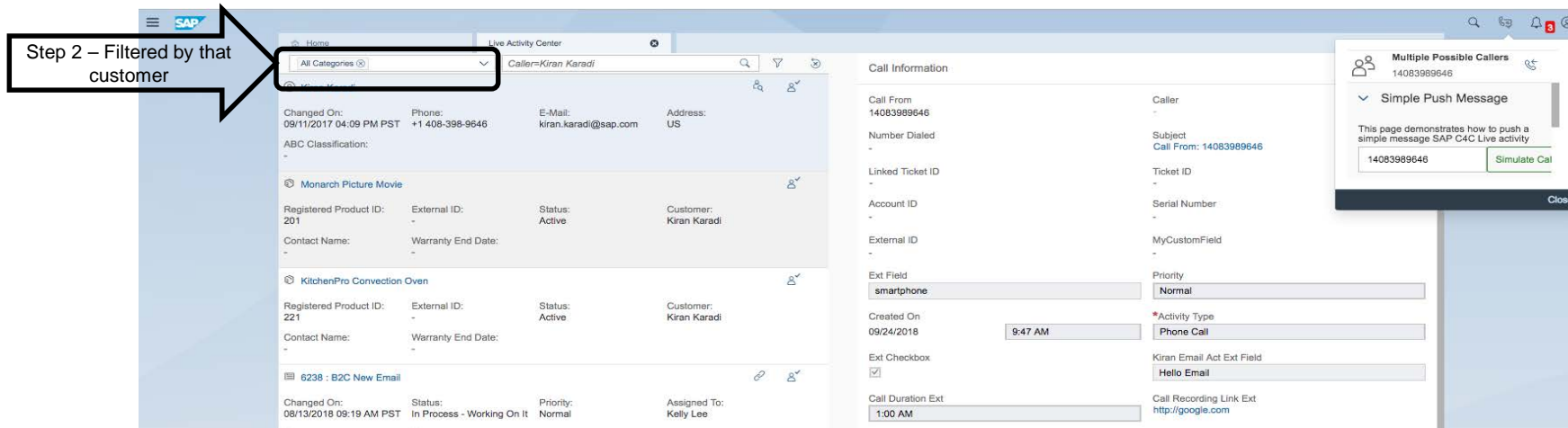
Separate icon on BP search results to trigger second search. On that action, trigger second search with “Categories = All” and Search Filter BP = “Selected BP”

CTI - New BP search in Search results action



Business Description of Feature

- Where phone number is associated with multiple contacts, trigger a secondary search on the contact
- trigger second search with “Categories = All” and Search Filter BP = “Selected BP”



Key Business Benefits

- Allows agents to quickly identify correct BP in interaction context.
- Efficient search option to link interaction to correct open ticket

CTI - Search – Default Search Refinement Enable Category Filter

Filtered by Tickets, Contracts or other supported category

Item ID	Item Description	Changed On	Status	Priority	Assigned To	Customer	Source
6594	Test Contract	08/27/2018 05:37 PM PST	Open	Immediate	-	BlueDrive	M2M via IoT
5030	System down	03/26/2018 03:40 PM PST	Open	Immediate	-	BlueDrive	M2M via IoT
5044	Solar Grid performance usse	12/12/2017 05:03 PM PST	Accepted	Immediate	Timmy Hardy	BlueDrive	M2M via IoT
6222	Issue with solar panel	09/06/2017 10:04 AM PST	Open	Normal	-	BlueDrive	M2M via IoT
6075	ASM Serial ID testing	01/05/2016 08:10 PM PST	Open	Normal	-	BlueDrive	M2M via IoT
5094	pool directions	09/16/2014 11:08 AM PST	Resource Requested	Normal	Juliane Beyer	BlueDrive	M2M via IoT

Business Description of Feature

- Allows flexibility in further refining default search results by category (tickets, contracts, etc.)
- Search results refresh and can be returned to default state
- Applies to default and manual search

Key Business Benefits

- Enables agent to fine tune search results
- Efficient identification of contextual object of interaction

CTI - Enable Contracts in Live activity

Use Case – Enable Contracts in Search

Default Search - As an Agent, I should be able to see contracts for the caller along with other information.

Manual Search – As an Agent, I should be able to search for contracts

Why is this needed?

Common to have contracts in B2B scenarios

Solution Details

Include Contracts as a new Category in Live Activity.

Limitation – Works on Account phone number only. Not on Contacts.

CTI - Enable Contracts in Live activity filter

The screenshot shows the SAP Live Activity Center interface. On the left, a navigation menu includes 'Contracts' with an arrow pointing to it labeled 'Includes Contracts'. The main area displays a list of contracts, including '8 - 5 year Contract for Solar Panel Grid' (Active), '3 - Bluedrive Systems Contract - VIP' (Obsolete), and 'C2153 - Bluedrive Systems Contract - VIP' (Obsolete). On the right, the 'Call Information' panel shows details for a call from '+1 16503275165' (Bluedrive) with a subject of 'Simple Push Message'. A 'Simulate Call' button is visible in the call information panel.

Business Description of Feature

- Include contacts as new category in Live Activity default search
- Enable filter of results by contract category
- Search results are based on phone number (not contract id)

Key Business Benefits

- Contract support/look up ease for agent interaction context
- Reduces agent navigation at point of contact.

The screenshot shows the 'Live Activity Configuration' screen. It includes sections for 'Communication Provider' (SAP Contact Center), 'Flon Client Settings', and 'Provider Control Dimensions'. An 'Add Search Object' dialog is open, showing a list of objects including 'Contracts'. An arrow points to this dialog with the text 'Setup - Add Contracts in LV Configuration'.

CTI - Customer identification based on address phone numbers

Use Case – Enable Personal phone in Customer Identification

Customer Identification -

As an System, I should be able to identify caller based on personal phone numbers.

Why is this needed?

B2B – Contacts – With multiple addresses and phone numbers. Common scenarios.

Solution Details

Include Address Phone numbers as part of Search.

CTI - Customer identification based on address phone numbers

Michael Gomez

Overview Feed **Addresses** Relationships Activities Leads Sales Leads Opportunities Sales Quotes External Follow-Up Docume... Registered < >

Business Address

61 Briercliff Road
New York NY 10011
United States

Personal Addresses (2)

Address	Phone	Fax	Mobile
US	+1 199-988-8777		
	+1 122-233-3444		

Phone number here is now supported in CTI Customer identification

Status: Active
Name: Michael Gomez
Title: -
Account: Bluedrive
Job Title: VP, Purchasing
Function: Purchasing Manager
Department: Purchasing Dept
Business Address: 61 Briercliff Road

Business Description of Feature

- Previously phone numbers on personal account addresses were not used in account identification, now they are included.
- Supports identification including all account and personal addresses with phone numbers

Michael Gomez

Changed On: 09/24/2018 11:40 AM PST
Name: Gomez, Michael
Account: Bluedrive
Function: Purchasing Manager
Department: Purchasing Dept
Phone: +1 6503275564

6594 : Test Contract

Changed On: 08/27/2018 05:37 PM PST
Status: Open
Priority: Immediate
Assigned To: -
Customer: Bluedrive
Source: M2M via IoT

Call Information

Call From: +1 122-233-3444
Caller: Bluedrive
Number Dialed: -
Subject: Call From: 1 122-233-3444
Linked Ticket ID: -
Ticket ID: -
Account ID: -
Serial Number: -
External ID: -
MyCustomField: -

Phone number from personal address

Michael Gomez
+1 122-233-3444

Simple Push Message

This page demonstrates how to push a simple message SAP C4C Live activity

+1 122-233-3444 Simulate Call

Close

Key Business Benefits

- Provides greater accuracy in account identification of incoming caller
- Provides greater flexibility for B2B service environments

CTI – Click to Call - Default Search results – Same as Inbound

Use Case -

As an Agent, when I click to call on BP OWL or TI (eg: Contacts OWL), I should be able to see search results for all categories

This should behave same as Inbound unique caller default search.

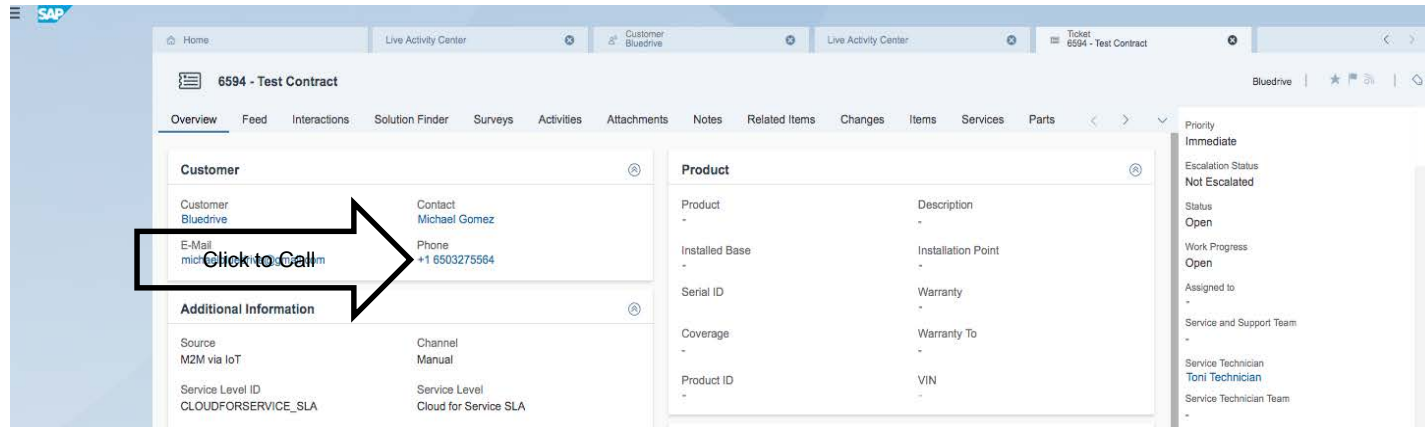
Why is this needed?

Keeping it consistent for both Inbound and Outbound makes it less confusing

Solution Details

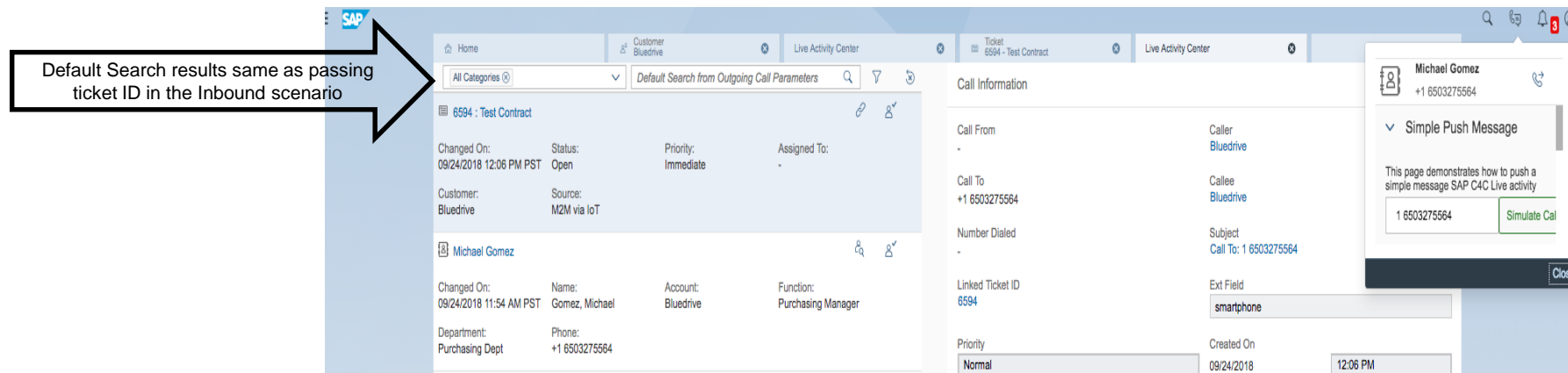
Same logic as Inbound

CTI – Click to Call - Default Search results – Same as Inbound



Business Description of Feature

- When click to call is used the live activity will invoke the same search results for the phone number use for the outbound call
- Search results enable the agent to navigate to relevant objects easily throughout the interaction as needed



Key Business Benefits

- Increase efficiency in outbound inquiry and call handling
- Consistency in inbound and outbound default search results

What's New in **Communication Channels**



What's New in 1811 for Communication Channels

Key Innovations

Social

- WeChat Integration via WeChat Mini Program

E-Mail

- Enable S/MIME Encryption for Employee Support E-mails
- Support default role for the new customers
- Unassociated E-Mail List – CC field added in search

Interactions & Response Editor

- Editor –Support Signature capability in E-mail editor
- Editor - Defaulting From Address for Employee Support
- Inline Editor – Default Font and Size
- Interactions – List View – Details section enhancement

Additional Enhancements

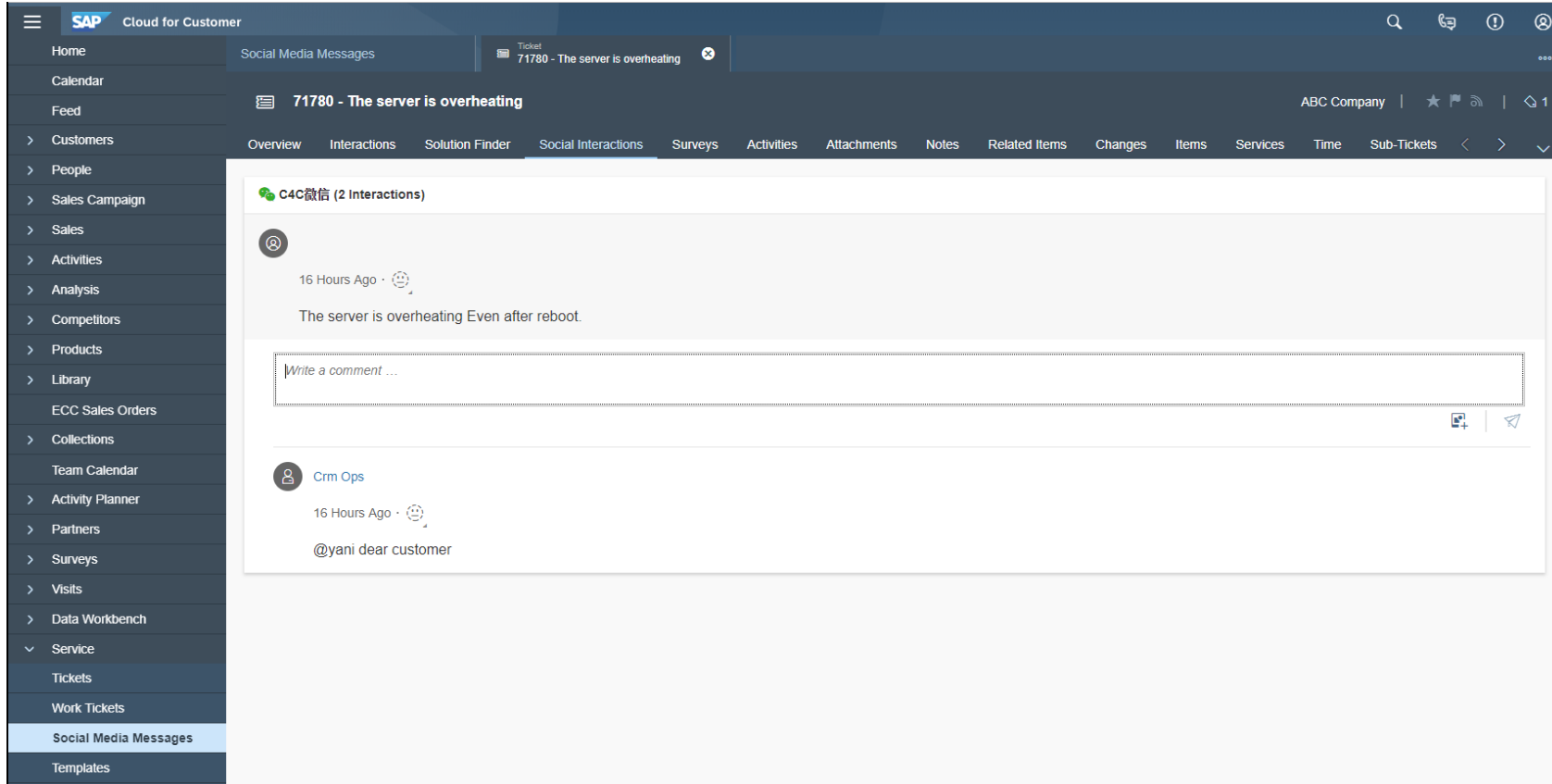
Social

- Fiori Client Uptakes
 - Custom Channel
 - Social Media Message Detail Screen
- Twitter – Direct Message Threading

Chat (See CTI/Live Activity)

- Fiori Client Uptake – Chat for Customer Service Scenario
- Support of Chat for Employee Support Scenario

Social – WeChat Integration via WeChat Mini-programs



The screenshot displays the SAP Cloud for Customer interface. The top navigation bar includes 'SAP Cloud for Customer', search, and notification icons. The left sidebar lists various modules, with 'Social Media Messages' selected. The main content area shows a message from 'C4C微信 (2 Interactions)' posted 16 hours ago with the text 'The server is overheating Even after reboot.' Below the message is a text input field for a comment and a 'Write a comment ...' placeholder. A response from 'Crm Ops' is visible below, stating '@yani dear customer'.

Business Description of Feature

- Enable WeChat integration via customer mini-programs.
- You need to have an intermediate app server to push and pull the data from C4C.
- Possibility to respond to the WeChat application from C4C

Key Business Benefits

- Connect WeChat content to C4C.
- Contextual response options.

Social – Fiori client uptake - Custom Channel and Social Message Details

The screenshot displays the SAP Fiori Social Media Messages interface. The left sidebar contains a navigation menu with options like Home, Calendar, Feed, Customers, People, Sales Campaign, Sales, Activities, Analysis, Competitors, Products, Library, ECC Sales Orders, Collections, Team Calendar, Activity Planner, Partners, Surveys, Visits, Data Workbench, Service, Tickets, Work Tickets, Social Media Messages (highlighted), Templates, and Unassociated E-Mails. The main content area shows a message from '@yani dear customer' with a 'Generic' channel. Below the message, there is a 'General Information' table and a list of interactions.

General Information			
Channel	C4C微信	Category	Response
Direction	Outbound	Created On	09/03/2018 09:44:01 PM
Link	Associated Ticket	71780	

C4C微信 (2 Interactions)

- @yani dear customer**
16 Hours Ago · 😊
The server is overheating Even after reboot.
- Crm Ops**
16 Hours Ago · 😊
@yani dear customer

Business Description of Feature

- Generic Channel is available on Fiori Client.
- Social Media Message Details is available on Fiori Client.
- Send Broadcast messages by using the Quick Create options
- YouTube and Instagram channels coming with next releases.

Key Business Benefits

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

Social – Twitter Direct Message Threading

The screenshot displays the SAP Cloud for Customer interface. On the left, the 'Social Media Channel' configuration for 'AlmikaPhone' is shown. Key details include: Channel ID: TW_ALMIKPH, Channel Type: Twitter, Language: English, Created On: 05.01.2015 18:59 UTC, Created By: Luu, Anita Admin, Active: checked, Block Responses: unchecked, Response Channel: TW_DEVOUT, Log Level: Detail, and Direct Messages: Add to Completed Ticket (selected). A dropdown menu for 'Ticket Type' is open, showing options: 'Add to Completed Ticket', 'Add to Open Ticket', and 'Do Not Process'. On the right, the 'Import Run' configuration page is visible, showing Run ID: 100215, Run Description: Run TW_ALMIKPH, Scheduled By, Recurrence Value, Recurrence Frequency, End Date, and Status: Active. Below this, there is a 'Last 5 Logs' dropdown and a table with columns: Processing Stat..., Maxi..., Execution ID, Application Log..., Created By, and Created On. The table currently displays 'No records found'.

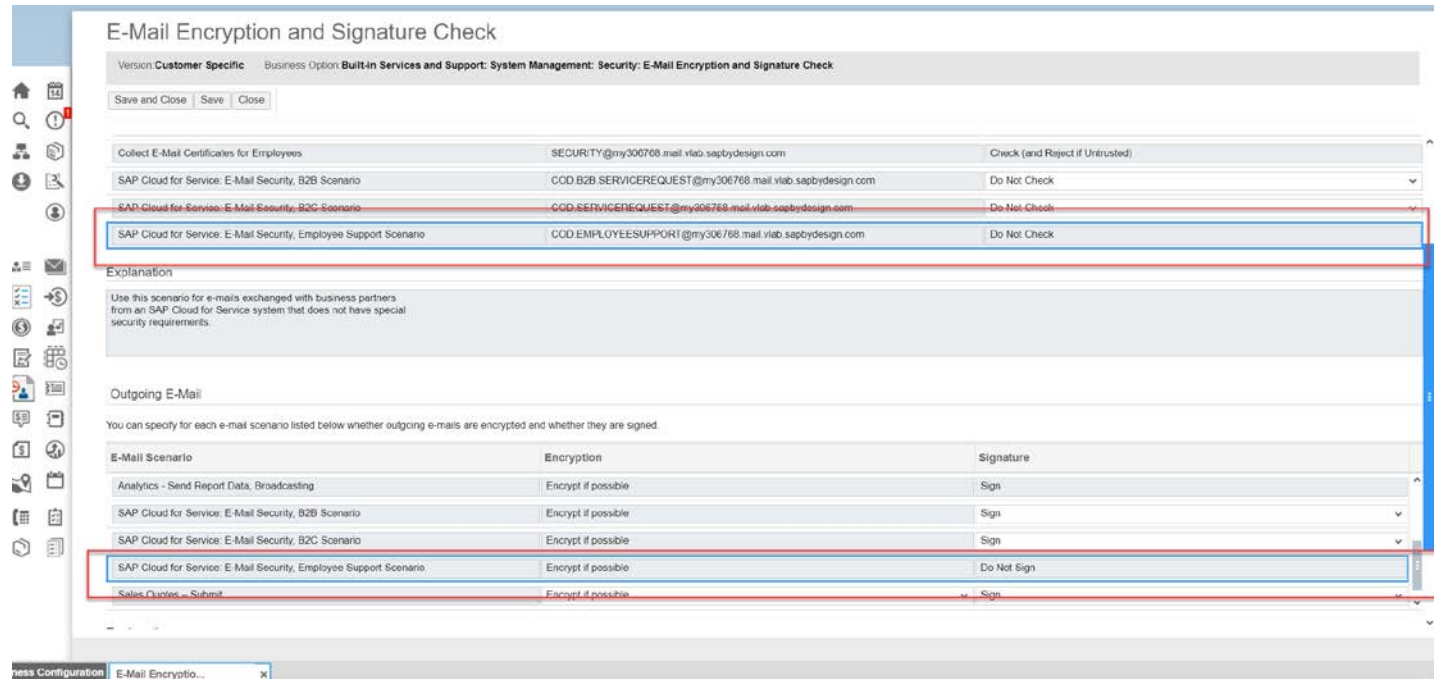
Business Description of Feature

- Options enabled to decide how the new DM Messages should be threaded to the existing ticket.
- Previously this option was available only for Facebook channels.
- Three options available:
 - Add to completed
 - Add to open
 - Do not process

Key Business Benefits

- All the conversation related to a issue can be tracked in one ticket.

E-Mail - Enable S/MIME Encryption for Employee Support E-mails

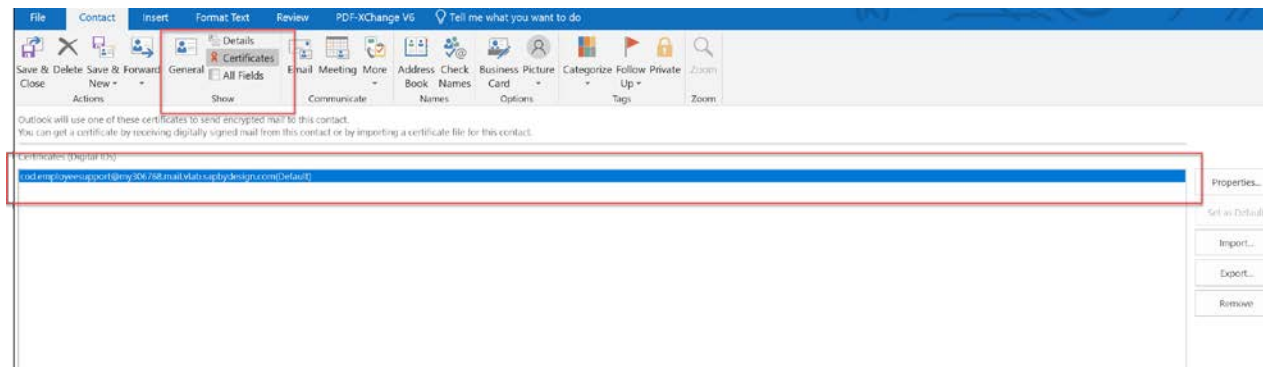


Business Description of Feature

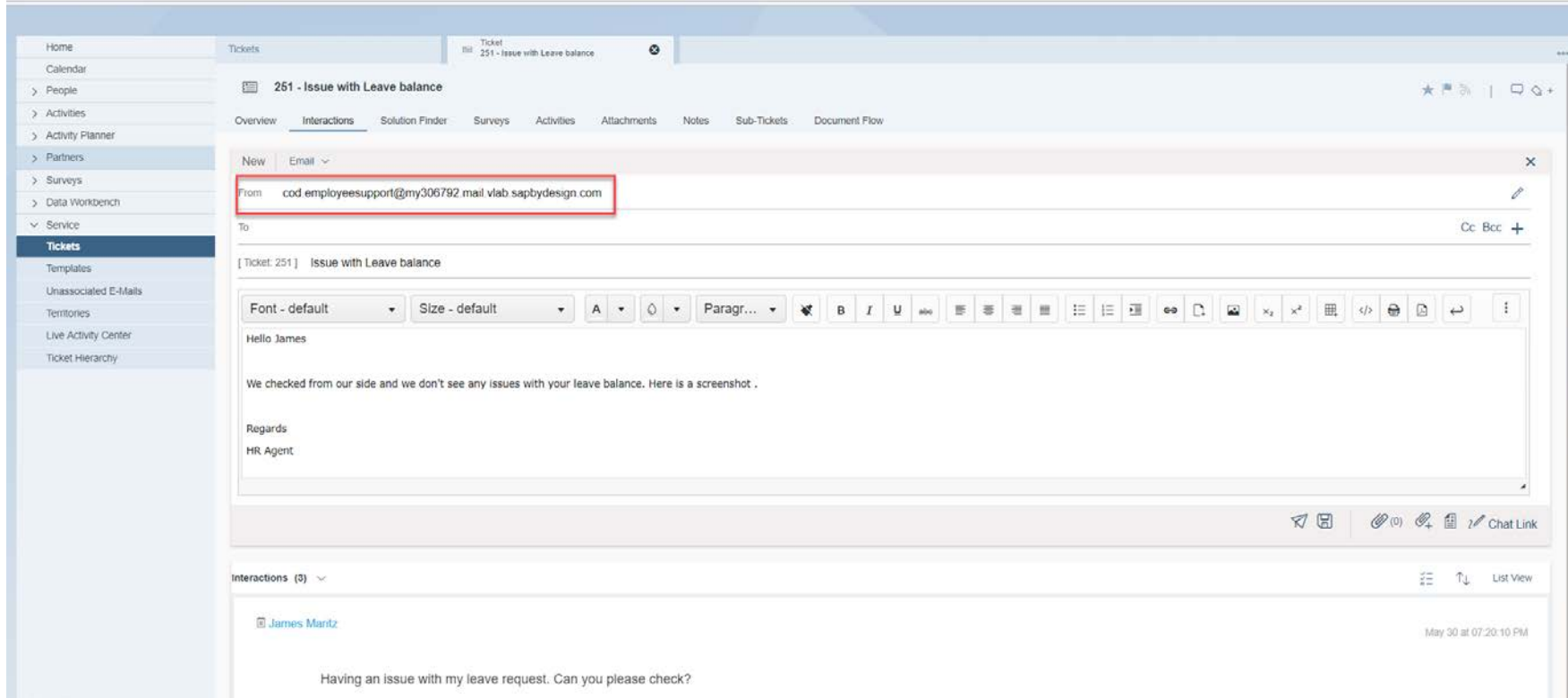
- Support Encryption of E-mails for Employee Support Scenario.
- Both inbound and outbound E-mails can be encrypted.

Key Business Benefits

- Encrypted communication between the employees and HR agents for confidential information.



E-Mail – Editor - Defaulting From Address for Employee Support



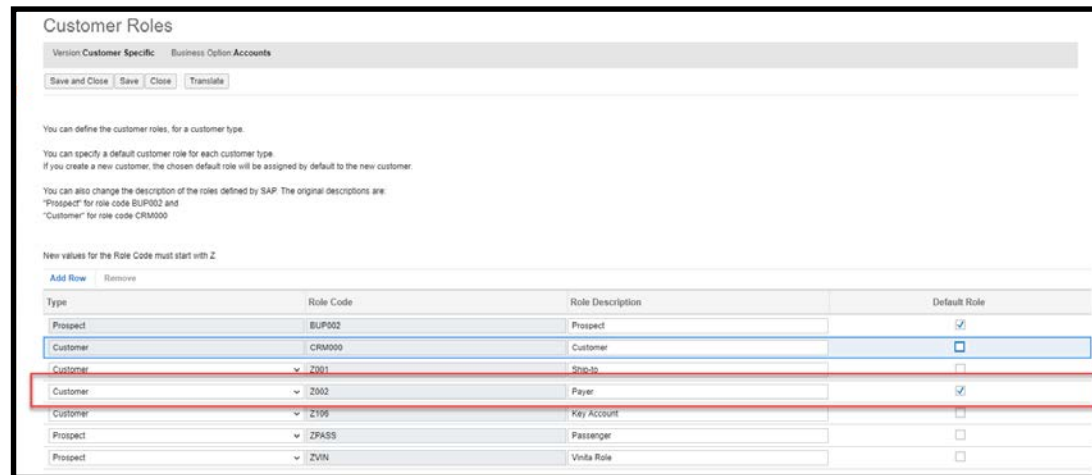
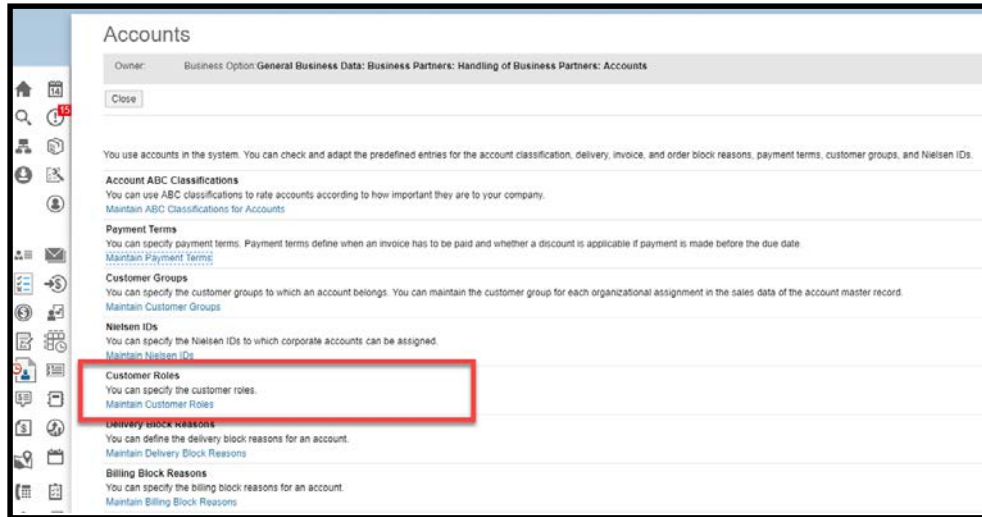
Business Description of Feature

- In the Employee Support scenario for a manual ticket if you respond back via e-mail the From address can now be defaulted. .
- The From e-mail address is based on the address that is maintained for the Organization.

Key Business Benefits

- Improves the efficiency of the agent.

E-Mail – Support default role for the Customers



Business Description of Feature

- For B2C E-mail channel, if you have maintained a default role for the customer then the default setting is respected when creating a customer via E-Mail.
- Custom Roles are defined in BC-> Accounts-> Maintain customer Roles

Key Business Benefits

- Define different e-mail channels to create different type of customers in your system.
- Can be used for capturing leads and prospects.

E-Mail - Unassociated E-Mail List – CC field

The screenshot shows the SAP Cloud for Customer interface for 'Unassociated E-Mails'. The search filters are expanded, and the 'CC' field is highlighted with a red box. Below the filters is a table of email records.

Name	From	E-Mail	Received	Reason
✉ Holy hell, the 512GB iPhone XS Max costs \$1,449 and 11 More	Mashable	mashabletopstories@mail.m...	09/13/2018 01:03:06 PM	Sender is bl...
✉ Trump's odd 9/11 fist pumping started a Photoshop battle, obvi...	Mashable	mashabletopstories@mail.m...	09/12/2018 01:06:26 PM	Sender is bl...
✉ Naughty America Wants to Use Controversial 'Deep Fake' Tec...	Mashable	mashabletopstories@mail.m...	09/11/2018 01:03:06 PM	Sender is bl...
✉ The Chargerito is a super tiny iPhone charger that you can atta...	Mashable	mashabletopstories@mail.m...	09/10/2018 01:02:23 PM	Sender is bl...
✉ 5 Great Apps to Hide Your Sexy Photos With and 11 More	Mashable	mashabletopstories@mail.m...	09/08/2018 01:01:59 PM	Sender is bl...
✉ Game on a budget with an Asus gaming laptop on sale for \$15...	Mashable	mashabletopstories@mail.m...	09/07/2018 01:03:21 PM	Sender is bl...
✉ Amazon is offering a 256GB SanDisk microSD card for the low...	Mashable	mashabletopstories@mail.m...	09/06/2018 01:03:03 PM	Sender is bl...
✉ Save over \$3,000 on one of the best 4K TVs by Sony thanks to...	Mashable	mashabletopstories@mail.m...	09/05/2018 01:03:23 PM	Sender is bl...
✉ Steve Bannon is headlining the New Yorker Festival and reade...	Mashable	mashabletopstories@mail.m...	09/04/2018 01:02:22 PM	Sender is bl...
✉ 10 Labor Day sales on great gadgets you'll use all year and 11 ...	Mashable	mashabletopstories@mail.m...	09/03/2018 01:03:14 PM	Sender is bl...
✉ Test	V Nair, Nisha	nisha.v.nair@sap.com	09/02/2018 11:16:55 PM	Initiated by ...
✉ Everyone's heading back to Hogwarts in new 'Fantastic Beasts...	Mashable	mashabletopstories@mail.m...	09/01/2018 01:02:56 PM	Sender is bl...
✉ Sending the CC, field in both To and CC	Email01 RUI	email01rui@gmail.com	08/31/2018 03:24:07 PM	No matchin...
✉ Having the B2B e-mail address in CC	Email01 RUI	email01rui@gmail.com	08/31/2018 02:49:27 PM	No matchin...
✉ Sending an e-mail to test CC in B2B use case	Email01 RUI	email01rui@gmail.com	08/31/2018 02:46:58 PM	No matchin...
✉ Bye, Fiona: Emmy Rossum announces unexpected exit from '...	Mashable	mashabletopstories@mail.m...	08/31/2018 01:04:38 PM	Sender is bl...

Business Description of Feature

- Added the CC field in Advanced search of Unassociated E-Mail list.
- If the E-Mail channel address is in the CC field, then it can be used to filter the results.

Key Business Benefits

- If you want to restrict the unassociated e-mail list based on the channel information, then by defining a query in the To and CC field you can restrict.

E-Mail – Editor - Signature

The screenshot displays the SAP Cloud for Customer interface for editing an email. The main content area shows the email body with a rich text editor toolbar. A callout bubble with the text "select Signature" points to the signature tool icon in the toolbar. The email header shows the sender as "cod.servicerequest@my306768.mail.vlab.sapbydesign.com" and the recipient as "mashabletopstories@mail.mashable.com". The subject is "Apple will be releasing 3 new iPhones this year — here's everything you need to know and 11 More". The email body contains a preview of the email content, including a "Not displaying correctly? View this newsletter online." link. The interface also shows a sidebar with navigation options and a right-hand panel with metadata.

Business Description of Feature

- New signature tool introduced in the E-mail editor.
- The signature can be defined in the template workcenter.
- Both corporate and personal signatures are supported.
- Feature to apply signature automatically will come in a future release.

Key Business Benefits

- Improve efficiency of agent response by maintaining signatures.

Interactions – List View – Details section enhancement

The screenshot displays the SAP Cloud for Customer interface for a ticket titled '69614 - Nordson Demo'. The 'Interactions' section shows a list of two interactions. The first interaction is a draft email from Claudia Wolke to Email01 RUI. The second interaction is an email from Email01 RUI to Claudia Wolke, dated 03/29/2018. The details section for the second interaction shows the email content, including a 'Hello Nordson' greeting and a body of text. A 'More' menu is open over the email content, showing options: 'View Original Content', 'Reply', 'Forward', 'Copy to Ticket', and 'Move to Existing Ticket...'.

Channel	Subject	Date / Time	Sender	Recipients
[Draft]	[Draft] Re: [Ticket: 69614] Nordson Demo	04/03/2018 3:36 PM PST_NA	Claudia Wolke	Email01 RUI
	Nordson Demo	03/29/2018 9:53 PM PST_NA	Email01 RUI	Claudia Wolke

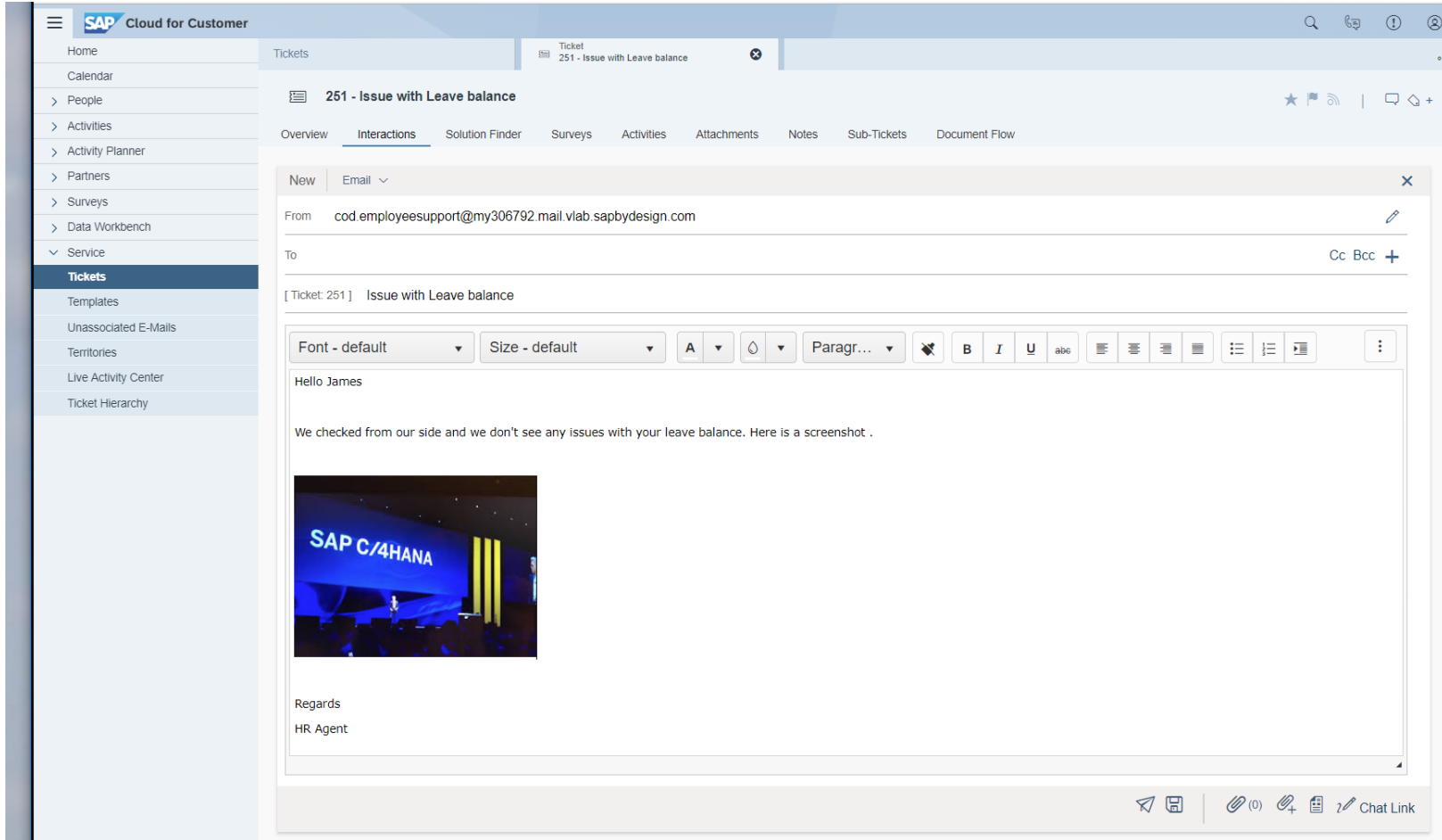
Business Description of Feature

- List view was introduced with 1808 release
- Detail section has all the actions supported.

Key Business Benefits

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

E-Mail – Inline Editor – Default Font and Size



Business Description of Feature

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

Key Business Benefits

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

What's New in **Service Management and Ticketing**



What's New in 1811 for Service Management and Ticketing

Key Innovations

- Support Multiple Categorization Catalogs
- Jam Knowledge Management group search
- Barcode scan in Ticket TI & QC
- Enable extension fields for Survey list in Ticket
- Team OVS – Enhance check for secondary relationship
- Enable managing the severity of the messages for Ticket
- Enable extension scenario from Account Sales Data to Ticket
- Enable code list restrictions for Payment & Inco. Terms
- My Queue and My Team Queue Tiles for Ticket
- ODATA maintenance of multiple Registered Products for Ticket

Additional Enhancements

- Clear “All” service categories
- Coverage & Service Level ID tracking in Ticket change log
- Add ERP Released Status field in Tickets Data Source
- Enable action “Set Irrelevant” for Workflow for Ticket
- Enable approval info on Ticket Summary PDF
- Enable Workflow rules to display custom party roles for Notifications/Activity Tasks
- Add more fields for placeholder in Workflow rules
- Add Item description based on the document language
- Add Sales Organization in advanced filter for Work Ticket list
- Enable Product External ID in Van Stock pop-up
- ODATA enhancement for accessing Formatted Text
- Enable “AuthorUUID” and “CreationIdentityUUID” in service A2X

Multiple Service Catalogs: Service Category based on Ticket Type

Service Categories: All Catalogs (3)

Edit New Delete Change Status

All Catalogs Search

Status	Catalog ID	Catalog Name	Version	Created By	Valid From	Description
Released	ID_1	Employee Support Catalog	1	David Palmer	09/20/2018 EST	Employee Support Catalog
Released	ID_2	Financial Services Catalog	1	David Palmer	09/20/2018 EST	Financial Services Catalog
Released	ID_3	Procurement Support Catalog	1	David Palmer	09/19/2018 EST	Procurement Support Catalog

Details: Employee Support Catalog

Catalog ID: ID_1
 Valid From: 09/20/2018 EST
 Valid To: 12/31/9999 EST
 Description: Employee Support Catalog

Created By: David Palmer
 Created On: 09/19/2018 1:56 AM
 Changed By: David Palmer
 Changed On: 09/19/2018 2:06 AM

Business Description of Feature

- Support different Service Catalogs for different ticket types.
- Category selection is based on the Ticket Type.
- Once the catalog is associated to a ticket type it cannot be changed.
- Not yet supported:**
 - Offline availability
 - Not enabled for Odata service

Service Category Catalog: Employee Support Catalog

Status: Released Version: 1 Valid From: 09/20/2018 Created On: 09/19/2018 Created By: David Palmer

Save Close New Change Status You Can Also

General Catalog Structure

General Administrative Data

Catalog Name: Employee Support Catalog
 Catalog ID: ID_1
 Description: Employee Support Catalog
 Valid from/to: 09/20/2018 12:00 AM EST / 12/31/9999 7:00 AM EST
 Status: Released

Created By: David Palmer
 Created On: 09/19/2018 1:56 AM
 Changed By: David Palmer
 Changed On: 09/19/2018 2:06 AM

Usage (1) Add Remove

Service Issue Category Catalog Usage	Ticket Type
BO Service Request	SRRE - HR Direct Ticket

Key Business Benefits

- Only relevant categories are shown in the selection dropdown.
- Support multiple Process flows in the same system.

Service Category – Clear All

The screenshot displays the SAP Cloud for Customer interface for a ticket titled "72029 - This Tesla key fob looks like, you guessed it, a mini Tesla Model 3 and 11 More". The interface shows various sections including Employee, Customer, and Category. The Category section is highlighted with a red box, and a yellow callout bubble points to a "Clear All" button, stating: "Clicking on the clear all clears the contents of all the fields in the Category Section." The Category section includes fields for Service Category (MA Customer Help), Incident Category (Server), Cause Category (Report), and Resolution Category (No Problem Found). The Service Location section is also visible below the Category section.

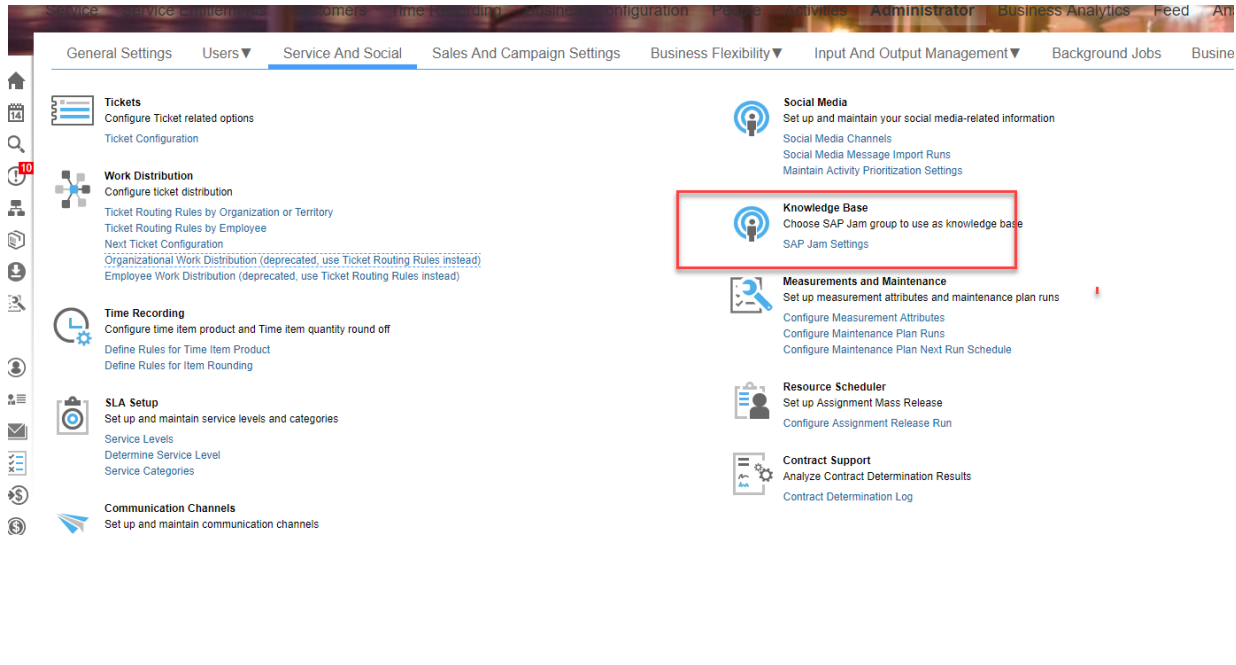
Business Description of Feature

- New button to clear all the fields of the Category.
- Button delivered as personalization hidden.

Key Business Benefits

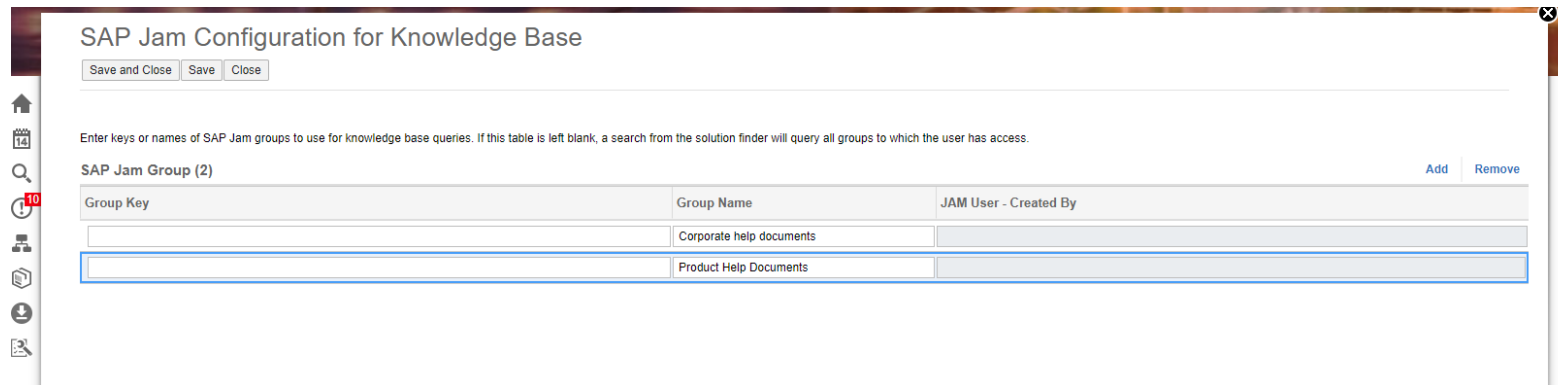
- Usability improvement of clearing all the fields of Category at one go..

KB : JAM - Support Searching within Specific Groups



Business Description of Feature

- You can now define against which the KB search should search against.
- Can restrict to only a few groups where the articles are placed and not to all the groups the agent has access to.



Key Business Benefits

- Refine the search to only the groups where the KB articles are stored.

Ticket – New barcode scan in Ticket Serial ID

The screenshot displays the SAP Cloud for Customer mobile application interface on an iPad. The top status bar shows the time as 4:47 PM and 100% battery. The app header includes the SAP logo and 'Cloud for Customer'. A navigation menu on the left lists various modules: Contacts, Leads, Question Bank, Assignments, Tool Stock, Installation Points, Individual Customers, Related Attachments, Work Tickets (highlighted), Maintenance Plans, Product Lists, Groups, and Opportunities. The main content area shows a 'Ticket' for '72016 - Problem with Pump'. Below the ticket title, there are tabs for 'Overview', 'Interactions', 'Solution Finder', 'Surveys', 'Activities', and 'Attachments'. The 'Overview' tab is active, displaying a form with several fields. The 'Serial ID' field is highlighted with a yellow box and contains a barcode scan icon. Other fields include 'Country', 'Street', 'City', 'State', 'Postal Code', 'Product', 'Description', 'Installed Base', 'Installation Point', 'Warranty', 'Warranty To', 'Coverage', 'Product ID', 'VIN', 'Premise Ext. ID', and 'PoD External ID'. A 'Work Description' section at the bottom contains a text area with the placeholder 'Please add a note'. The bottom navigation bar includes icons for home, search, star, flag, and a plus sign, along with 'Save', 'Cancel', and 'Actions' buttons.

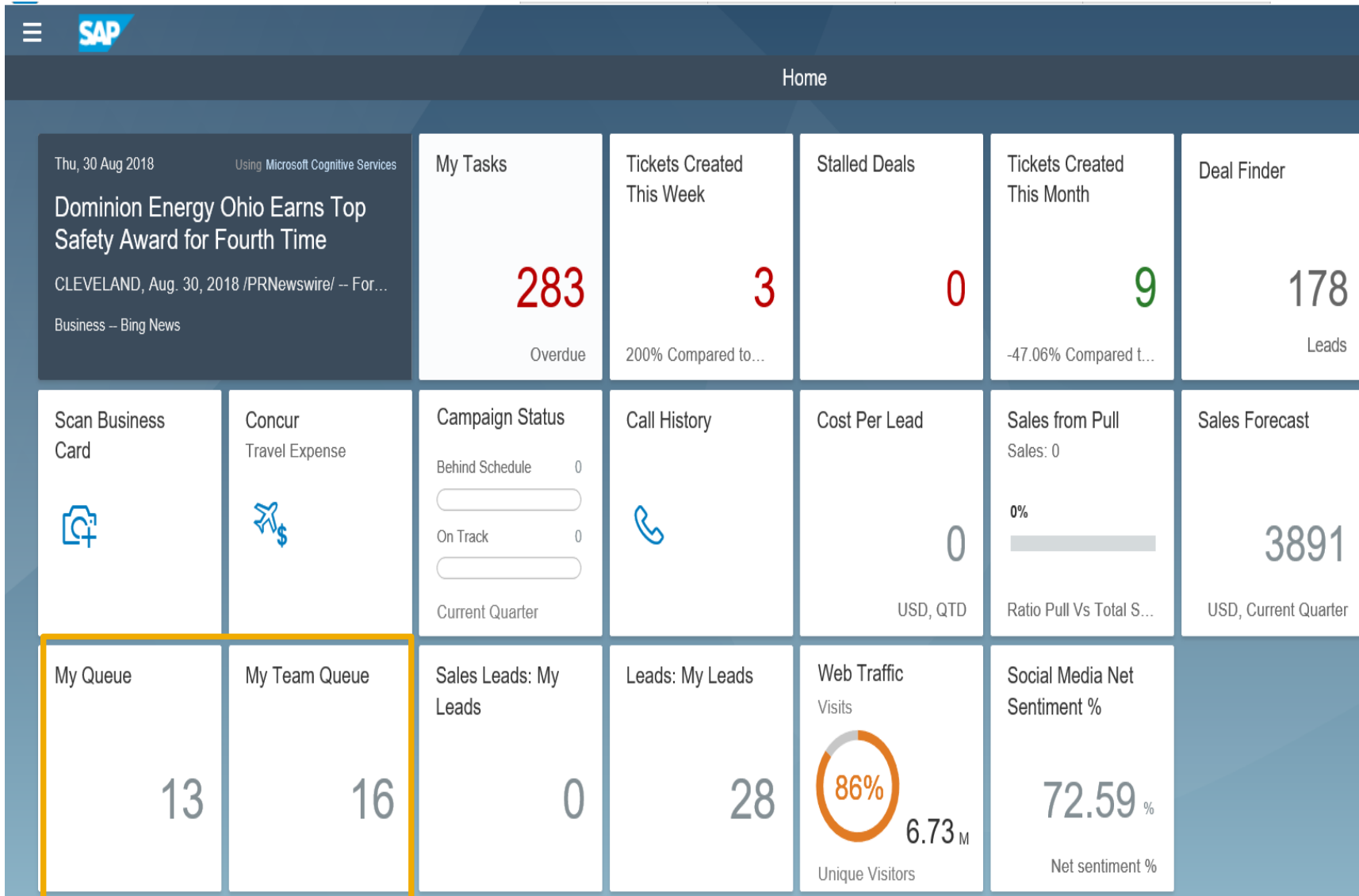
Business Description of Feature

- New Barcode scan option is added to the Serial ID field in Ticket.
- Currently this is only available in online.

Key Business Benefits

This will help technicians to scan the bar code using a scan option embedded in the Serial ID field in Ticket without having to navigate to the product object.

Ticket – My Queue & My Team Queue Tiles



Business Description of Feature

New Tiles are added for Ticket in FIORI client:

- My Queue (Pointing to “My Queue” query in Ticket list i.e. list of tickets which are non work relevant and with status “Open” or “In Process”)
- My Team Queue (Pointing to “My Team Queue” query in Ticket list)

Key Business Benefits

Users can navigate to ticket list for specific queries by clicking on these tiles on the homepage. Customers moving from HTML5 to FIORI client can use these tiles as replacement of the Queue WoC in HTML5.

Ticket - Enable extension fields for Survey list in Ticket

The screenshot displays the SAP Ticket interface for a ticket with ID 1811100379 from Silverstar Logistics. The 'Surveys' tab is active, and an 'Additional Fields' dialog is open. The dialog shows a table of extension fields with the following configuration:

Select	Label	Type	Ext. F...
<input type="checkbox"/>	Total		
<input type="checkbox"/>	Total		
<input type="checkbox"/>	Mel S		✓
<input type="checkbox"/>	indica		✓
<input type="checkbox"/>	test1		✓
<input type="checkbox"/>	testR		✓

The 'New Field' dialog is also visible, showing the configuration for a new extension field:

- * Business Context: Surveys List
- * Label: Final Check
- * Technical Name: FinalCheck
- Calculated:
- * Type: Text
- * Sub Type: Short Text (40)
- Data Protection Level: None
- Default Value:

Buttons for 'Save and Close', 'Cancel', 'Apply', and 'Cancel' are present at the bottom of the dialog.

Business Description of Feature

- Users can now add extension fields in the Survey list for Tickets.

Key Business Benefits

This will help customers to define extension fields for Survey lists in ticket to support new scenarios e.g. If a company manager wants to perform an extra final check on the surveys submitted by the vendors.

Ticket - Team OVS: Enhance check for secondary relationship

Org Unit ID	Org Unit Name	Org Unit Valid From	Org Unit Valid To
US1100	Sales Unit US	10/22/2013	Unlimited
ME2100	Social Queue- Medicines	01/01/2011	Unlimited

Business Description of Feature

- The system now allows assigning processor and service & support team combination for ticket for secondary relationship.
 - When changing a team, system checks if the current processor belongs to the new team (irrespectively if the processor is assigned as primary or secondary employee). If yes, then the processor is retained. If not, then the processor is cleared
 - When changing the processor, system checks if the new processor belongs to the current team (irrespectively if the processor is assigned as primary or secondary employee). If yes, then the current assigned team is retained. If not, then the new processor's primary team is assigned.

Key Business Benefits

Flexibility to assign the secondary team for the processor in the Ticket.

Ticket - Enable extension scenario from Account Sales Data to Ticket

The screenshot shows the SAP configuration interface for the field 'Ext_To_Ticket' under 'Account - Sales Data'. The 'Extension Scenarios' tab is active, displaying a table of available scenarios. The scenario 'Account - Sales Data to Service Request - General Information' is highlighted with a blue border and has a checkmark in the 'Field Added' column. Below the table, the 'Applied Extension Scenarios' section shows the same scenario is now applied.

Available Extension Scenarios

Extension Scenario	Field Added	Action
> Account - Sales Area Data to Pricing	<input type="checkbox"/>	<input type="button" value="+"/>
> Account - Sales Data to Activity - General Information	<input type="checkbox"/>	<input type="button" value="+"/>
> Account - Sales Data to Contract - General Information	<input type="checkbox"/>	<input type="button" value="+"/>
> Account - Sales Data to Sales Document - General Information	<input type="checkbox"/>	<input type="button" value="+"/>
> Account - Sales Data to Service Request - General Information	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
> Pricing	<input type="checkbox"/>	<input type="button" value="+"/>

Applied Extension Scenarios

Extension Scenario	Field Added	Action
> Account - Sales Data to Service Request - General Information	<input checked="" type="checkbox"/>	

Buttons: Save, Cancel, Delete

Business Description of Feature

- Extension scenario from Account Sales Data to Ticket is now added.

Key Business Benefits

Customers can take advantage of this extension scenario for their use cases.

Ticket - Enable code list restrictions for Payment Terms & IncoTerms

Code List Restrictions: All (29)

Business Object	Code To Restrict	Control
Sales Document	Item Type	Free Go
Ticket	Coverage Code	Ticket Ty
Opportunity	Sales Phase	Car Mode
Account	Academic Title	MyNewE
TestBO	CountryCode	
Opportunity	Sales Phase	
Opportunity	Forecast Category	Type
Sales Data	Distribution Channel	
Opportunity	Distribution Channel	Partner Manager
Opportunity	Sales Cycle	Document Type
Deal Registration	Status	Partner Contact
Sales Document	Document Type	Payment Terms Sales Rep Restricted
Deal Registration	Status	Partner Contact for PCM testing
Account	Custom type	Brand Interest

New Code List Restriction

Area the restriction applies to

* Business Object: Ticket

* Code to Restrict: Payment Terms

Control Field

Control Field Type: Business Fi... Extension F...

Business Field: Ticket Type

Business Role

Business Role:

Save Cancel

Business Description of Feature

- Code list restrictions for Payment Terms & Inco. Terms for Ticket are enabled.

Key Business Benefits

This will help customers to restrict Payment Terms & Inco. Terms within the ticket based on different ticket attributes. i.e. Certain ticket types might not allow for a particular Payment Term.

Ticket - Enable managing the severity of the messages for Ticket

Tickets for Customer Support

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

Close

You selected tickets during scoping. You can create and adapt the definitions for ticket types and ticket status.

Document Types
You can maintain document types.
[Maintain Document Types](#)

Ticket Status Dictionary
You can maintain entries for ticket status schemas.
[Maintain Status Dictionary Entries](#)

Ticket Status Schemas
You can maintain ticket status schemas and assign status values from ticket status dictionary.
[Maintain Status Schemas](#)

Involved Parties
You can decide which party roles you want to use. You can activate or deactivate these roles. However some party roles are set as mandatory by default and you cannot deactivate these.
[Maintain Involved Parties](#)

Number Range
You can maintain the number range.
[Maintain Number Range](#)

Item Processing Codes
You can create and maintain item processing codes.
[Maintain Item Processing Codes](#)

Item Processing Determination
You can maintain item processing determination.
[Maintain Item Processing Determination](#)

Messages
You can configure the severity of various system messages.

Business Description of Feature

- The Message Severity Configuration for Ticket is now enabled for few messages so that customer can influence the severity of the enabled messages to warning or even hide it.

Key Business Benefits

Customers would have the flexibility of choosing message severity based on their use cases for the messages which are enabled for Ticket.

Ticket - ODATA maintenance of multiple Registered Products

The screenshot displays the SAP Cloud for Customer interface for a ticket titled '1811090814 - Test Issue'. The 'Products' tab is active, showing a table with two registered products. The table is highlighted with a yellow border. Below the table, the 'General Data' section provides details for the selected product, 'AHT COMBI 75'.

Product	Product Description	Serial ID	Installation Point	Installed Base	Main Indicator	Action
AHT Combi 110e	AHT Combi 110e	1234	1329	446	<input checked="" type="checkbox"/>	
AHT COMBI 75	AHT COMBI 75	MCF-0001-V4.4-200501/124	12	441	<input type="checkbox"/>	

General Data

Product	Product Description
AHT COMBI 75	AHT COMBI 75
Installed Base	Serial ID
441	MCF-0001-V4.4-200501/124
Installation Point	Installation Point Category
12	Registered Product
Installation Point External ID	Installation Point Description
-	AMT Gas Boiler Combi 75 V4.4

Business Description of Feature

- Following fields are enabled for Ticket registered products (Service Reference Objects) for ODATA:

- InstallatonPointID
- InstallationPointUUID
- InstalledBaseID
- InstalldBaseUUID
- MainIndicator
- ProductID
- SerialID

Key Business Benefits

Users can add/update multiple Registered products in Ticket via ODATA.

Ticket - Workflow rules to display custom party roles

New Rule

1 Enter Basic Data 2 Define Conditions 3 Define Actions 4 Review 5 Confirmation

Previous Next Deactivate Activate Finish Cancel

* Rule Type: Notification

Send Notification: 0 Day(s) On Business Object

Expires After: 30 Day(s)

Cancellation of Task: Conditions Not Met

* Subject: Priority is Immediate

To include placeholders in the subject line of your notification, select the field for each relevant predefined placeholder. Use the predefined placeholder in the subject, for example: Check document &1.

Placeholder	Field
&1	Agent
&2	Priority
&3	
&4	

Recipient Determination

Click Add Determination to have the system determine one or more recipients based on the business object for which the notification is created.

Add Determination Remove Determination

- Agent Responsible for Ticket
- Approver of Ticket
- Employee In Behalf Of (Z)
- Employee of Ticket
- Employee Requestor (Z)
- Manager of Agent Responsible for Ticket
- Manager of Service Technician for Ticket
- Partner Contact of Ticket
- Pref. Service Agent (Z)
- Pref. Service Contractor (Z)

Business Description of Feature

- Workflow rules to display custom party roles under Recipient Determination for Notifications/Activity Tasks are now enabled.

Key Business Benefits

This will help customers to set custom party roles as recipients when creating Notifications/Activity tasks for ticket via workflow.

Ticket - Enable action “Set Irrelevant” for Workflow

The screenshot shows the 'New Rule' configuration window. At the top, there is a progress bar with five steps: 1 Enter Basic Data, 2 Define Conditions, 3 Define Actions (highlighted), 4 Review, and 5 Confirmation. Below the progress bar are buttons for 'Previous', 'Next', 'Deactivate', 'Activate', 'Finish', and 'Cancel'. The main area contains a dropdown for '* Rule Type' set to 'Action'. Below that is a 'Select Action:' dropdown menu which is open, showing a list of actions: De-escalate, Determine Territory, Escalate, Release for Scheduling, Release To ERP, Request External Pricing, and Set Irrelevant. The 'Set Irrelevant' option is highlighted with a yellow rectangular box.

Business Description of Feature

“Set Irrelevant” action in Ticket is added as workflow action for Ticket.

Key Business Benefits

Customers can set the Ticket as irrelevant using this workflow action.

Ticket - Add more fields for placeholder in Workflow rules

Edit Rule : Test

1 Enter Basic Data 2 Define Conditions 3 Define Actions 4 Review 5 Confirmation

Previous Next Deactivate Activate Finish Cancel

PDF Variant Country:

To include placeholders in the subject line and the template file of your notification, enter a placeholder name, for example #ID#, and select a field for each placeholder. Make sure you use the same placeholders in the subject and the template.

Add Row Remove

Placeholder	Field
#AGENTFNAME#	Agent First Name
#AGENTLNAME#	Agent Last Name
#AGENTEMAIL#	Agent E-Mail
#AGENTMOBILE#	Agent Mobile
#AGENTPHONE#	Agent Phone

Recipient Determination

Click Add Determination to have the system determine one or more recipients based on the business object for which the notification is created.

Add Determination Remove Determination

Business Description of Feature

Following fields are enabled as placeholders for Email templates in ticket workflow.

- Agent First Name
- Agent Last Name
- Agent E-Mail
- Agent Mobile
- Agent Phone
- Contact E-Mail
- Contact Mobile
- Contact Phone
- Coverage

Key Business Benefits

- This will help customers to add placeholders for the above ticket fields in the emails sent via workflow.

Ticket - Add Sales Organization in advanced filter for Work Ticket list

The screenshot displays the SAP Work Tickets advanced filter interface. The left sidebar shows the navigation menu with 'Work Tickets' selected. The main area shows the 'All Tickets (2643)' list with various filter fields. The 'Sales Organization' field is highlighted with a yellow box, showing 'US1100' as the selected value. The 'Division' field is also visible, showing 'Division 1' as the selected value. Other filter fields include ID, Subject, Customer, Priority, Requested Start, Completion Due, Service Category, Incident Category, Service Location, Service Technician, Service Technician Team, Involved Party, Escalation Status, Status, Work Progress, and Requires Work.

Business Description of Feature

- The fields “Sales Organization” & “Division” are enabled as search criteria in the advanced search filter for work ticket list.

Key Business Benefits

This will help customers to search the tickets based on these fields in the work ticket list.

Ticket – Approval Info in Ticket Summary

Ticket 107406



Page: 3/3

Approval Information

Approval Sequence Num	Approval Step Status	Changed On	Approver Name	Approver Phone
1	Approved	Sep 1, 2018 2:02:0	CRM OPS	
2	In Approval		James Guanzon	

Business Description of Feature

Following fields are enabled for Ticket online summary:

- Ticket Approval Status
- Ticket Approval Information
 - Approver Name
 - Approver Phone
 - Approval Sequence No.
 - Approval Step Status
 - Changed On

Key Business Benefits

This will help customers to add these fields in the ticket online summary.

Ticket - Enable additional fields for Ticket change history

The screenshot displays the SAP Cloud for Customer interface for a ticket titled "71882 - Cannot detect speaker system bluetooth". The "Changes" tab is selected, showing a list of changes made to the ticket. A yellow box highlights the "Attribute" dropdown menu, which is currently set to "Coverage (Item)". Below the list, a details view for the change on "09-17-2018 1:50 AM" is shown, indicating that the "Coverage (Item)" attribute was updated from "W0-No warranty/goodwill" to "W1-Warranty 100%".

Change Date/Time	Changed By	User ID
09-17-2018 1:50 AM	Eddie Smoke (K80GFLZEI...)	ADMINISTRATION01
09-17-2018 1:49 AM	Eddie Smoke (K80GFLZEI...)	ADMINISTRATION01

Attribute	Value Changed From	Value Changed To	Modification...
Coverage (Item)	W0-No warranty/goodwill	W1-Warranty 100%	Update

Business Description of Feature

- The Changes in following Ticket fields are now tracked as part of Ticket change history:
 - Coverage
 - Coverage (Item)
 - Service Level ID

Key Business Benefits

- Customers can track the changes for these fields in Ticket change history.

Ticket - Add Item description based on the document language

Edit Project Scope: First Implementation

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

Previous Next Finish Cancel Save Draft

Display Scope Changes Actions

All Elements

Scoping Element	Type
> Sales Campaign	
> Sales	
✓ Service	
> Entitlement Management	
✓ Customer Care	
> Knowledge Base	
> Service Request Management	
> Complaint Management	
> Service and Repair	
> Communication for Customer Care	
> Analysis for Customer Care	
> Employee Support	

Questions for Service Request Management

Set as Reviewed Set as Not Reviewed

Business Option	Rev
✓ Ticket completion based on worklist status (1)	
Do you want to prevent users from completing tickets when mandatory surveys and tasks remain open?	Not
✓ Ticket document language (2)	
Use Document language for ticket summary reports?	Not
Use ticket language for item description?	Not
✓ Ticket interaction sort order (1)	
Do you want to show the latest ticket interactions at the top of the list?	Rev
✓ Ticket Summary Templates (1)	
Do you want to use locally-stored templates for ticket summary reports?	Rev
✓ User Provisioning (1)	

Business Description of Feature

- When this Business Configuration option is selected then the item description is copied in the document language of the ticket when creating a new ticket item.

Key Business Benefits

This will help customers be able to add the item description in different languages (based on ticket document language).

Ticket - ODATA enhancement for accessing formatted text

The screenshot shows the SAP OData export configuration screen. On the left is a navigation menu with options like Activities, Analysis, Products, Activity Planner, Customer Merge, Partners, Surveys, Visits, Data Workbench, Monitor, Import, and Export. The main area is titled 'Export' and 'Export Data'. It includes radio buttons for 'Individual Object' (selected) and 'Complete Business Object (DO NOT USE)'. Below, there's a search bar for 'Service Request Notes | ticket' and a list of search results. At the bottom, there are radio buttons for 'Select Data' (selected) and 'All Data', and a 'Filters' section. An inset window shows a Microsoft Excel spreadsheet with columns A through K. Column K is labeled 'FormattedText' and contains XML snippets for each row of data.

ObjectID	ParentObj	ExternalKey	ServiceRequestID	Type_Code	Language	Lang	Text	FormattedText
00163E5F/00163E5F/NOTE_01	1811	C3_02	1811098502	10011	Internal Comment	en	Jira170 - oData Ticket #2 with Note added via Upsert	<FormattedText>Jira170 - oData Ticket #2 with Note added via Upsert</FormattedText>
00163E5F/00163E5F/NOTE_04	1811	C3_02	1811098502	10004	Incident Description	en	Adding NOTE_04 with Type_Code 10004 = Ticket Description	<FormattedText>Adding NOTE_04 with Type_Code 10004 = Ticket Description</FormattedText>
00163E5F/00163E5F/NOTE_02	1811	C3_02	1811098502	10011	Internal Comment	en	Update Ticket #1811098502 by Adding NOTE_02 with Type_Code 10011 via Upsert	<FormattedText>Update Ticket #1811098502 by Adding NOTE_02 with Type_Code 10011 via Upsert</FormattedText>
00163E5F/00163E5F/NOTE_03	1811	C3_02	1811098502	10007	Reply to Customer	en	Adding NOTE_03 with Type_Code 10007 via Upsert to Update Ticket #1811098502	<FormattedText>Adding NOTE_03 with Type_Code 10007 via Upsert to Update Ticket #1811098502</FormattedText>
00163E5F/00163E5F/NOTE_05	1811	C3_02	1811098502	10022	Service Response Reports	en	Adding NOTE_05 with Type_Code 10022 = Ticket Work Description	<FormattedText>Adding NOTE_05 with Type_Code 10022 = Ticket Work Description</FormattedText>
00163E5F/00163E5F/NOTE_06	1811	C3_02	1811098502	10011	Internal Comment	en	Adding NOTE_06 with Type_Code 10011 and expect to show in both Notes tab and in ONLY Interactions tab	<FormattedText>Adding NOTE_06 with Type_Code 10011 and expect to show in both Notes tab and in ONLY Interactions tab</FormattedText>
00163E5F/00163E5F/NOTE_07	1811	C3_02	1811098502	10007	Reply to Customer	en	Adding NOTE_07 with Type_Code 10007 and expect to show in ONLY Interactions tab	<FormattedText>Adding NOTE_07 with Type_Code 10007 and expect to show in ONLY Interactions tab</FormattedText>
00163E5F/00163E5F/NOTE_08	1811	C3_02	1811098502	10011	Internal Comment	en	NOTE_08 with Type_Code 10011 to show in both Notes tab and Interactions tab.	<FormattedText>NOTE_08 with Type_Code 10011 to show in both Notes tab and Interactions tab.</FormattedText>

Business Description of Feature

- Ticket Odata is now enhanced so that formatted text can also be used via oDATA for read-only access.

Key Business Benefits

This will help customers to access Ticket formatted data in the ODATA APIs for read-only access.

Ticket - Enable Product External ID in Van Stock pop-up

The screenshot shows the 'Add from Stock Location' pop-up in SAP Cloud for Customer. It features two main sections: 'Stock Location Name (0)' and 'Products (6)'. The 'Stock Location Name' section is currently empty, displaying 'No data'. The 'Products (6)' section contains a table with the following data:

Product	Description	Quantity Available	Quantity Used	External ID
BALL_BEARING	Spare Part 02 for van stock	200 ea		HD-SPAREPART-02
BUSHING	Spare Part 03 for van stock	800 ea		HD-SPAREPART-03
BALL_BEARING	Spare Part 02 for van stock	100 ea		HD-SPAREPART-02
BUSHING	Spare Part 03 for van stock	500 ea		HD-SPAREPART-03
BALL_BEARING	Spare Part 02 for van stock	15 ea		HD-SPAREPART-02
BUSHING	Spare Part 03 for van stock	20 ea		HD-SPAREPART-03

A yellow box highlights the 'External ID' column in the 'Products (6)' table. The search bar above the table shows '*HD*' and a search icon. The bottom of the pop-up has buttons for 'Add Products (0)' and 'Cancel'.

Business Description of Feature

- Product external ID is added to the van stock pop-up for search and the product list.

Key Business Benefits

Users can use product external ID in an external system integration scenario.

- **Ticket** - Enable “AuthorUUID” and “CreationIdentityUUID” in service A2X

```

    <ServiceRequestExecutionLifeCycleStatusCode>1</ServiceRequestExecutionLifeCycleStatusCode>
  </Item>
- <Item>
  <ID>70</ID>
  <Description>Item 70</Description>
  <ProductID>Z1235A1</ProductID>
  <RequestedQuantity>1.0</RequestedQuantity>
- <RequestedFulfilmentPeriod>
  <StartDateTime timeZoneCode="PST"> 20171026070000.0000000</StartDateTime>
  <EndDateTime timeZoneCode="PST"> 20171027070000.0000000</EndDateTime>
  <StartDateTime_V2 timeZoneCode="PST">2017-10-26T07:00:00Z</StartDateTime_V2>
  <EndDateTime_V2 timeZoneCode="PST">2017-10-27T07:00:00Z</EndDateTime_V2>
</RequestedFulfilmentPeriod>
- <ServicePerformerParty>
  <BusinessPartnerInternalID>8000000581</BusinessPartnerInternalID>
</ServicePerformerParty>
- <PricingTerms>
  <WarrantyGoodwillCode>G1</WarrantyGoodwillCode>
</PricingTerms>
  <UserServiceTransactionProcessingTypeCode>SRP0</UserServiceTransactionProcessingTypeCode>
  <ServiceTransactionProcessingTypeCode>0007</ServiceTransactionProcessingTypeCode>
  <InvoicingMethodCode>2</InvoicingMethodCode>
  <ExecutionReleaseStatusCode>1</ExecutionReleaseStatusCode>
  <FulfilmentProcessingStatusCode>1</FulfilmentProcessingStatusCode>
  <ServiceRequestExecutionLifeCycleStatusCode>1</ServiceRequestExecutionLifeCycleStatusCode>
</Item>
- <Text>
  <ID>00163E07C01D1EE7AE9FD6110F148755</ID>
  <TypeCode>10011</TypeCode>
  <CreationDateTime>2017-10-24T21:02:48.19303Z</CreationDateTime>
  <Content>This is a note</Content>
  <AuthorUUID>00163e07-c01d-1ed7-acd4-e45e6bc254c9</AuthorUUID>
  <CreationIdentityUUID>00163e07-c01d-1ed7-acd4-e45e6bc254c9</CreationIdentityUUID>
</Text>
</ServiceRequest>
- <ProcessingConditions>
  <ReturnedQueryHitsNumberValue>1</ReturnedQueryHitsNumberValue>
  <MoreHitsAvailableIndicator>false</MoreHitsAvailableIndicator>
  <LastReturnedObjectID>00163E07C2741EE7AE9DA62A5F9AFE78</LastReturnedObjectID>
</ProcessingConditions>
</n0:ServiceRequestByElementsResponse_sync>

```

Business Description of Feature

- The fields “AuthorUUID” and “CreationIdentityUUID” are enabled in service A2X

Key Business Benefits

Users can now use these fields in migration scenarios.

Ticket - Add ERP Released Status field in Tickets Data Source

Ticket

Create Report

You can customize the view by selecting from available chart options. Expand the left panel in order to further narrow down the criteria or select a present view or selection at top.

Selection Available Fields Rows & Columns

ERP Released Status

Disable Refresh

ERP Released Status	Status	Total	Total Gross	Total Planned Esti...	Total Actual Esti...	Onsite Arrival Dt
Not Released	Open	0.00	0.00	0.00	0.00	
	In Process - Waiting f...	0.00	0.00	0.00	0.00	
	In Process - Working...	0.00	0.00	0.00	0.00	8,269
Partially Released	Open	0.00	0.00	0.00	0.00	
	Accepted	0.00	0.00	0.00	0.00	
	On Site	0.00	0.00	0.00	0.00	
	Open	0.00	0.00	0.00	0.00	
Not assigned	Resource Requested	0.00	0.00	0.00	0.00	
	Scheduled	0.00	0.00	0.00	0.00	
	Completed	0.00	0.00	0.00	0.00	
	In Process - Accepted	0.00	0.00	0.00	0.00	
	In Process - Approved	0.00	0.00	0.00	0.00	
	In Process - Dispatched	0.00	0.00	0.00	0.00	
	In Process - Forward...	0.00	0.00	0.00	0.00	
	In Process - Need Mo...	0.00	0.00	0.00	0.00	
	In Process - Pending...	0.00	0.00	0.00	0.00	
	In Process - Pending...	0.00	0.00	0.00	0.00	
	In Process - Pending...	0.00	0.00	0.00	0.00	
	In Process - Pending...	0.00	0.00	0.00	0.00	
	In Process - Release...	0.00	0.00	0.00	0.00	
In Process - Resched...	0.00	0.00	0.00	0.00		
In Process - Scheduled	0.00	0.00	0.00	0.00		
In Process - Waiting f...	0.00	0.00	0.00	0.00		
In Process - Working...	0.00	0.00	0.00	0.00		
Open	0.00	0.00	0.00	0.00		
Resource Request - ...	0.00	0.00	0.00	0.00		

Resolution Category ID
Resolution Time Compliance Code
Resolved On Date
Resolved On Date Time
Resolved On Date Time(Local)
Resolved On Date(Local)
Room
Sales Organization
Sales Organization ID
Sales Unit
Serial ID
Service and Support Team
Service Category
Service Category Catalog
Service Category ID
Service Level
Service Location Country
Service Organization
Service Organization ID
Service Technician
Service Technician Team
Source
State
State
Status

Business Description of Feature

- The field ERP Released Status on Ticket header is enabled for the Ticket data source.

Key Business Benefits

Users can include this field in the reports for ticket created in the Business Analytics.

What's New in Machine Learning



What's New in 1811 for Machine Learning in Service

Key Innovations

- Similar Tickets (GA)
- View Prediction details inline on Ticket Category field
- Auto-Data extraction using API's
- Auto-onboarding for ML Service customers

What's New in Installed Base, Registered Product and Installation Point



What's New in 1811 for Installed Base and Registered Products

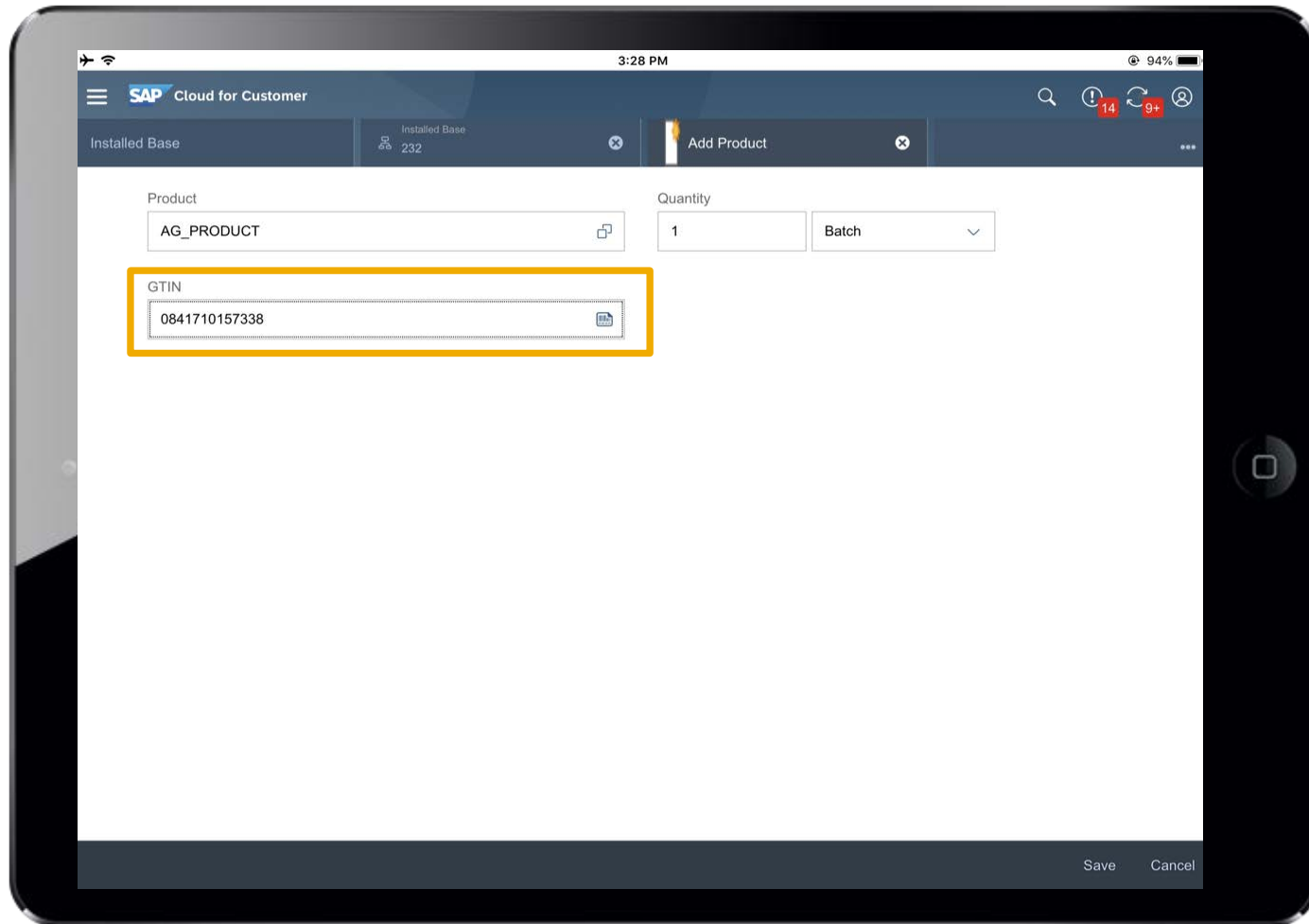
Key Innovations

- Add products to an installed base using barcode scan
- Party and Address determination for functional locations
- Business Partner merge – merge of installed base

Additional Enhancements

- Description in registered product create
- Product external ID in installed base items tab
- Sales quote tab in installed base and registered products

Installed base items - Add products using barcode/QR code scan



Users can add a product as an item in the installed base by scanning the Product barcode.

- New field “GTIN” is available on Add Product screen
- User can tap the scan icon to scan
- Product is automatically identified based on the scanned GTIN value
- Feature is available on tablets and smartphones
- Feature is available both in online and offline mode

Installed base items - Add products using barcode scan

Points to Note:

- If a single product is associated with the scanned GTIN, Product is automatically identified and corresponding UoM is filled.
- If multiple products are associated with the scanned GTIN, a popup opens and the user needs to select the Product-UoM combination.
- If user does not select anything from the popup, then one entry from the popup gets automatically selected.
- Default quantity is always 1.
- User can change the UoM from the dropdown (only in online mode)
- If the user manually changes the product after it was identified via scanning, the new product and its UoM is filled (UoM will become blank in offline mode), however the GTIN field is not cleared.

Functional Locations - Party determination

The top screenshot shows the SAP Cloud for Customer interface for an Installation Point (ID 3592). The 'Involved Parties(2)' table is displayed with the following data:

Role	Name	E-Mail
Customer	Space Balls ff	
Ship-To	testacc	

The 'Location' details are as follows:

- Country: US - United States
- State: -
- Building/Floor/Room: -
- House Number: 123
- Street: ABC Boulevard
- City: -
- Postal Code: -

The 'Details' panel on the right shows:

- ID: 3592
- Name: FL AG4
- Category: Functional Location
- Status: In Preparation
- External ID: -
- Belongs to Installation Point ID: -
- Customer: Space Balls ff
- Contact: Bobby Brownie
- Address: 123 ABC Boulevard, Address Line 2 24891, United States

The bottom screenshot shows the 'Space Balls ff' customer profile. The 'Relationships (1)' table is displayed with the following data:

Relationship Type	Business Partner	Sales Organization	Distribution ...	Division	Address	Action
Has Ship-To Party	testacc				123 ABC Boulevard / 24891 / US	

Party determination, that is available for registered products, is now enabled for functional location as well

For example: Ship-to party and Bill-to party are determined from the Customer (if maintained) when a functional location is created for that customer.

Functional Location - Address Determination

The screenshot displays the SAP Cloud for Customer interface for a Functional Location (ID 3592). The main view is divided into several sections:

- Involvement Parties (2):** A table with columns for Role, Name, and E-Mail. The Customer is 'Space Balls ff' and the Ship-To is 'testacc'.
- Sales and Distribution:** Fields for Sales Organization, Distribution Channel, Division, Sales Office, and Sales Group, all currently empty.
- Notes:** A section for adding notes, currently empty.
- User Status:** A section for user status, currently empty.
- Location:** A section (highlighted with a yellow box) containing address-related fields: Country (US - United States), State, Building/Floor/Room, House Number (123), Street (ABC Boulevard), City, and Postal Code (24891).
- Warranty:** Fields for Warranty and Duration, both currently empty.
- Details:** A right-hand panel showing metadata: ID (3592), Name (FL AG4), Category (Functional Location), Status (In Preparation), External ID, and Belongs to Installation Point ID. It also lists the Customer (Space Balls ff), Contact (Bobby Brownie), and Address (123 ABC Boulevard, Address Line 2 24891, United States). Valid From is 12.09.2018, Valid To is Unlimited, Created On is 12.09.2018 14:57 INDIA, and Created By is Timmy Hardy.
- Actions:** A bar at the bottom right with an 'Update Location From' button (highlighted with a yellow box).

Address determination that is already available for registered products, is now enabled for functional location as well with the same scoping question and logic.

- Location is determined from the customer address by default. It is also possible to default the location from the ship-to-party address instead based on scoping.



Registered Product and Installed Base -> Group: Additional options -> Registered Product uses customer address as the default location. Do you want to use the ship-to-party address instead?

- Location update also follows the same rules.

Customer Merge – Installed Base merge

Customer merge – installed base are now supported for merge during customer merge

The image displays three overlapping screenshots of the SAP CRM 'Installed Base' tab, illustrating the state of installed bases for different customer roles during a merge process.

Top Screenshot (AG Master): Shows the 'Installed Base' tab for a Customer role (AG Master). The table contains one entry:

Name	ID	Status	Location	Created On	Created By	Changed On	Changed By
AG iBase MM	51	In Preparation	IN	09/09/2018 11:3..	Eddie Wright	09/09/2018 11:3..	Eddie Wright

Middle Screenshot (AG Slave): Shows the 'Installed Base' tab for a Prospect role (AG Slave). The table contains two entries:

Name	ID	Status	Location	Created On	Created By	Changed On	Changed By
AG iBase MS1	52	In Preparation	IN	09/09/2018 11:3..	Eddie Wright	09/09/2018 11:3..	Eddie Wright
AG iBase MS2	53	Obsolete	IN	09/09/2018 11:3..	Eddie Wright	09/09/2018 11:3..	Eddie Wright

Bottom Screenshot (AG Master after merge): Shows the 'Installed Base' tab for a Customer role (AG Master) after the merge. The table contains three entries, combining the data from the previous two screenshots:

Name	ID	Status	Location	Created On	Created By	Changed On	Changed By
AG iBase MM	51	In Preparation	IN	09/09/2018 11:3..	Eddie Wright	09/09/2018 11:3..	Eddie Wright
AG iBase MS1	52	In Preparation	IN	09/09/2018 11:3..	Eddie Wright	09/09/2018 11:3..	Eddie Wright
AG iBase MS2	53	Obsolete	IN	09/09/2018 11:3..	Eddie Wright	09/09/2018 11:3..	Eddie Wright

Customer – Installed Base tab after merge of customer

New Registered Product – Description

The screenshot displays the 'New Registered Product' form in SAP. The form is divided into two main sections: '*Customer' and '*Product'. The '*Customer' section includes fields for 'Customer' (Blue drive), 'Registered Product Description' (3D Printer), 'Reference Date' (09/17/2018), and 'Service Technician'. The '*Product' section includes fields for 'Product' (3D Printer), 'Serial ID', 'Warranty', and 'Copy From Location' (Main Address). The 'Registered Product Description' field is highlighted with a yellow border. At the bottom right, there are 'Save' and 'Cancel' buttons.

Registered Product Description can be provided when creating a new Registered Product .

By default it is taken from the product description and can be changed by the user.

Other enhancements

- Product external ID is available in the installed base items list. The field is hidden by default and can be enabled by the administrator.
- Registered Products and Installed Base can be added to Sales Quotes. List of quotes can be seen on the Sales Quote tab on Registered Product and Installed Base screens. New quote can also be created from there.

What's New in **Contract**



What's New in 1811 for Contracts

Key Innovations

- Sales Contract as Follow-Up to Quote (see Sales Release Preview)
- 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

Sales Quote: Create follow-up contract from Sales Quote

The screenshot shows the SAP Cloud for Customer interface for a sales quote (10286 - gw). The 'Sales Documents' facet is selected and highlighted with a red box. Below it, there are three sections: 'Sales Quotes (0)', 'Sales Orders (0)', and 'Contracts (0)'. The 'Contracts (0)' section is highlighted with a red box, and the 'New' button is also highlighted. The 'External Follow-Up Documents (0)' section is visible at the bottom.

Relationship	Document Type	ID - Description	External Reference	Date	Owner
No data					

Relationship	Document Type	ID - Description	External Reference	Date	Owner
No data					

ID - Description	External Reference	Owner
No data		

ID - Description	External Reference	Owner
No data		

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*.

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	<input type="checkbox"/>	<input type="checkbox"/>		10		(Current) Date	
SOR	Sales Order Request	<input checked="" type="checkbox"/>	<input type="checkbox"/>		10		(Current) Date	
ZAGB	Big Sales Quotes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bi-directional	10	Always	(Current) Date	
ZASC	Sales Quote w. Follow Up Sales Contr.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		10		(Current) Date	
ZBC1	BM Quote 1	<input type="checkbox"/>	<input checked="" type="checkbox"/>		1.000		(Current) Date	
ZBQ1	BMQuote 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		100		(Current) Date	
ZUH	ZUH	<input type="checkbox"/>	<input checked="" type="checkbox"/>		10		(Current) Date	
Z_RQ	ZCH Repair Quote	<input type="checkbox"/>	<input checked="" type="checkbox"/>		10		(Current) Date	
ZAGI	Sales Quote with inbound Replication	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Inbound	100		(Current) Date included in Copy	
ZRFQ	Hybris - RFQ	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		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!

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

Product ID	Description	Quantity	Actions
MDECC-DS02	MDECC-DS02	10 ea	[trash]
MDECC-DS02	CUST 15012016	20 ea	[trash]
MDECC-DS02	CUST 15012016	30 ea	[trash]
	Text Item		[trash]
MDECC-DS05	MDECC-DS05	50 ea	[trash]



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

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

The screenshot displays the SAP CRM interface for a sales quote. The main area shows four tables: Sales Quotes (0), Sales Orders (0), Contracts (0), and External Follow-Up Documents (0). The 'Test' section at the bottom contains a document with ID 'Nidhi_Test_EXT' and description 'TestRichtext'. On the right, a 'Details' sidebar provides information about the quote, including account details, status, and financials. A context menu is open over the 'Submit' button, which is highlighted with a red box. The menu options include 'Create External Follow-up Document', 'Set as Won', 'Set as Lost', 'Set as Pending', 'Copy', 'Preview', 'Edit Output Settings', and 'Withdraw from Approval'.

ID - Description	External Reference	Date	Owner
No data			

ID - Description	External Reference	Date	Owner
No data			

ID - Description	External Reference	Owner
No data		

Type	Document ID	Created On	Overall Status	Delivery Status
No data				

Test
Nidhi_Test_EXT
TestRichtext

Details sidebar information:

- Progress: Not Relevant
- Document Type: Sales Quote
- Account: Pfizer Ireland Pharmaceutical2
- Primary Contact: Chen
- Ship-To: Pfizer Ireland Pharmaceutical2
- Status: Open
- Approval Status: Not Started
- External Reference: ZOD DONT TOUCH QUOTE2CONTRACT
- Description: Process Flow Quote to Sales Contract
- Date: 05.09.2018
- Requested Date: 06.09.2018
- Reason for Rejection: -
- Overall Discount (%): -
- Total: 15.700,00EUR
- Payment Terms: Payable immediately due net
- Incoterms: Airborne Express
- Incoterms Location: Sankt-Ingbert
- Delivery Priority: Immediate
- Chance of Success: 70%
- Valid To: 10.09.2018
- Owner: Daniela Silber
- Sales Unit: Almica Germany
- Distribution Channel: Direct sales
- Division: -
- Sales Office: Almica Germany
- Sales Group: Almica Germany
- Territory: Germany
- Follow-up Transfer Status: Not Started

Context menu options:

- Submit
- Create External Follow-up Document
- Set as Won
- Set as Lost
- Set as Pending
- Copy
- Preview
- Edit Output Settings
- Withdraw from Approval



Set-up Details

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

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

The screenshot displays the SAP Sales Documents interface for document 9965. It features three tables: Sales Quotes (0), Sales Orders (0), and Contracts (0). The 'New' button in the Contracts table is highlighted with a red box. A details pane on the right shows the following information:

- Progress: Pending
- Document Type: Sales Quote
- Account: Pfizer Ireland Pharmaceutical2
- Primary Contact: Chen
- Ship-To: Pfizer Ireland Pharmaceutical2
- Status: Open
- Approval Status: Approval not Necessary
- External Reference: ZOD DON'T TOUCH QUOTE2CONTRACT
- Description: Process Flow Quote to Sales Contract
- Date: 05.09.2018
- Requested Date: 06.09.2018
- Reason for Rejection: -
- Overall Discount (%): -
- Total: 15.700,00EUR
- Payment Terms: Payable immediately due net
- Inco terms: -



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

The screenshot shows the 'New Contract' form in SAP. The form is divided into two columns. The left column contains fields for 'Type' (Sales Contract), 'Status' (In Preparation), 'External Reference', 'Signed On' (dd.MM.yyyy), 'Ends On' (07.09.2018), 'Contact' (Chen), 'Administrator' (Eddie Smoke), 'Sales Organization' (Almica Germany), 'Distribution Channel' (Direct sales), and 'Territory' (Germany). The right column contains fields for 'Contract Template', 'ID' (7706), 'Name' (Process Flow Quote to Sales Contract), 'Begins On' (06.09.2018), 'Customer' (Pfizer Ireland Pharmaceutical2), 'Ship-To' (Pfizer Ireland Pharmaceutical2), 'Owner' (Daniela Silber), 'Sales Unit' (Almica Germany), 'Division', and 'Time Zone' (UTC+00:00) Burkina Faso, Bouvet Islands, Cote d'Ivoire, West Sal. A red dashed box highlights the 'Save and Open' button at the bottom right of the form.



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

The screenshot displays the SAP S/4HANA interface for a Sales Contract (ID: 7706). The main area is divided into several sections:

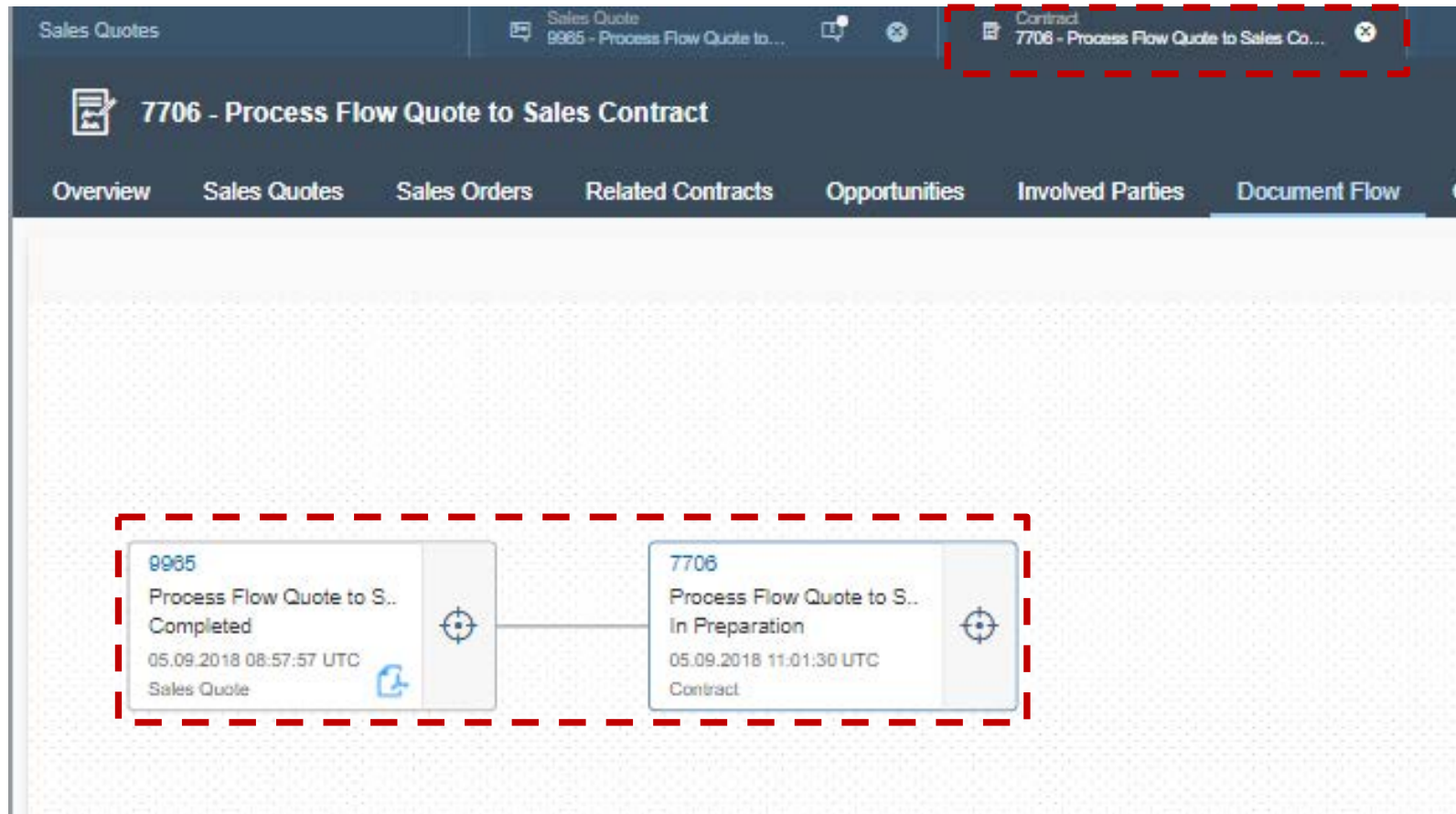
- Items (7):** A table listing contract items with columns for Line, Image, Status, Product ID, Description, and Target Quantity. The items are: Line 10 (MDECC-DS02, 10 units), Line 20 (MDECC-DS02, 20 units), Line 30 (MDECC-DS02, 30 units), Line 100 (Text Item), Line 200 (MDECC-DS05, 50 units), and Line 210 (MDECC-DS02, 40 units).
- Organizational Data:** Shows Sales Organization (Almca Germany), Sales Unit (Almca Germany), Distribution Channel (Direct sales), Division (-), and Territory (Germany).
- Related Contracts (0):** A table showing no related contracts.
- Attachments (2):** A table listing attachments: 'LINK SAP HOMEPAGE' and 'LOCAL FILE SDD_Quote2C...'. The 'LOCAL FILE SDD_Quote2C...' attachment is selected.
- Pricing Data:** Shows Currency.
- Details Pane (Right):** Provides contract metadata including Name (Process Flow Quote to Sales Contract), Status (In Preparation), ID (7706), Customer (Pfizer Ireland Pharmaceutical2), and Administrator (Eddie Smoke).



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

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

The screenshot shows the SAP interface for a Sales Contract (7706 - Process Flow Quote to Sales Co...). The top navigation bar includes tabs for Overview, Sales Quotes, Sales Orders, Related Contracts, Opportunities, Involved Parties, Document Flow, Changes, Workflow Changes, and Notes. The main content area is divided into two facets:

Sales Quotes (0)
 Displayed is a list of sales quotes that are referenced to this contract on item level in order to derive contract specific pricing in the sales quote.
 No data

Sales Quotes (selling contract) (1)
 Displayed is a list of sales quotes that show (based on the relationship) if this contract was created as follow-up transaction from a sales quote, or if the sales quote was created as follow-up transaction from this contract (using the New action).

Relationship	Document T...	ID	Description	External ID	Owner	Date	Req
Predecessor	Sales Quote	9965	Process Flow Quote to Sales Contract		Daniela Silber	05.09.2018	06.



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

The screenshot displays the SAP CRM interface for a Sales Quote. The main navigation bar includes tabs for Overview, Products, Involved Parties, Document Flow, Sales Documents, Attachments, Pricing, Approval, Activities, Output, Feed, and Changes. The 'Sales Documents' tab is active, showing three sections: Sales Quotes (0), Sales Orders (0), and Contracts (1). The 'Contracts (1)' section is highlighted with a red dashed box and contains one entry: ID 7706, Description 'Process Flow Quote to Sales Contract', and Owner Daniela Silber. A right-hand sidebar shows 'Set-up Details' for the selected contract, including Account (Pfizer Ireland Pharmaceutical2), Primary Contact (Chen), Ship-To (Pfizer Ireland Pharmaceutical2), Status (Completed), Approval Status (Approval not Necessary), External Reference (ZOD DONT TOUCH QUOTE2CONTRACT), Description (Process Flow Quote to Sales Contract), Date (05.09.2018), Requested Date (06.09.2018), Reason for Rejection (-), Overall Discount (%), Total (15.700,00EUR), and Payment Terms (Zusatz: immardistalv.dna.net).



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

The screenshot displays the SAP S/4HANA Document Flow interface. At the top, there are tabs for 'Sales Quotes' and 'Contract'. The main area shows a document flow diagram with two nodes: a Sales Quote (ID 9965) and a Contract (ID 7706). The Sales Quote node is labeled 'Completed' and has a timestamp of '05.09.2018 08:57:57 UTC'. The Contract node is labeled 'In Preparation' and has a timestamp of '05.09.2018 11:01:30 UTC'. A red dashed box highlights the entire document flow diagram. On the right side, a details panel is open, showing the following information:

- Progress: Won
- Document Type: Sales Quote
- Account: Pfizer Ireland Pharmaceutical2
- Primary Contact: Chen
- Ship-To: Pfizer Ireland Pharmaceutical2
- Status: Completed
- Approval Status: Approval not Necessary
- External Reference: ZOD DON'T TOUCH QUOTE2CONTRACT
- Description: Process Flow Quote to Sales Contract
- Date: 05.09.2018
- Requested Date: 06.09.2018
- Reason for Rejection: -
- Overall Discount (%):



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

The screenshot shows the 'New Quote' configuration screen in SAP. The 'Description' field is highlighted with a red box and contains the text 'Process Flow: Quote to Sales Contract & delete Contract Items'. Below the form is a table of products with columns for Product ID, Description, Quantity, and Actions.

Product ID	Description	Quantity	Actions
MDECC-DS02	MDECC-DS02	10 ea	▼ 🗑️
MDECC-DS02	CUST 15012016	20 ea	▼ 🗑️
MDECC-DS02	CUST 15012016	30 ea	▼ 🗑️
	Text Item		▼ 🗑️
MDECC-DS05	MDECC-DS05	50 ea	▼ 🗑️



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

Products (7)

Line	Product ID	Description	Price	Price Unit	Net Weight
210	MDECC-DS03	MDECC-DS03	210,00 EUR	1 ea	
220	ZVAPRDEX01	Product DE_CN_01	220,00 EUR	1 ea	

Item Involved Parties (7)

Party Role	Name	Address	E-Mail	Phone	Main	Acti
Bill-To	Pfizer Ireland Pharmaceutical2	89 TT / Galway 12345 / IE			<input checked="" type="checkbox"/>	
Account	Pfizer Ireland Pharmaceutical2	89 TT / Galway 12345 / IE			<input checked="" type="checkbox"/>	
Ship-To	Pfizer Ireland Pharmaceutical2	10 Shipto / Customer 10101...			<input checked="" type="checkbox"/>	
Seller	Almica Incorporation	Dietmar Hopp Allee 30 / 691...	contact@almica.com	+49 6227762019	<input checked="" type="checkbox"/>	
Employee R...	Daniela Silber	Viktoriastraße 191 / 30451 H...	DESalesman@onDemand.c...	+49 (511) 9369-007	<input checked="" type="checkbox"/>	

Attachments (1)

Title	Type	Changed On	Changed By	Actions
WEB LINK ITEM 10	Standard Attachment	05.09.2018 13:49	Eddie Smoke	

Details

- Progress Won
- Document Type Sales Quote
- Account Pfizer Ireland Pharmaceutical2
- Primary Contact Chen
- Ship-To Pfizer Ireland Pharmaceutical2
- Status Completed
- Approval Status Approval not Necessary
- External Reference ZOD DONT TOUCH QUOTE2CONTRACT
- Description Process Flow: Quote to Sales Contract & delete Contract Items
- Date 05.09.2018
- Requested Date 06.09.2018
- Reason for Rejection -
- Overall Discount (%) -
- Total 15.700,00EUR
- Payment Terms Payable immediately due net
- Incoterms Airborne Express
- Incoterms Location Sankt-Ingbert
- Delivery Priority Immediate
- Chance of Success 70%
- Valid To 10.09.2018
- Owner Daniela Silber
- Sales Unit Almica Germany
- Distribution Channel Direct sales
- Division -
- Sales Office Almica Germany
- Sales Group Almica Germany
- Territory Germany
- Follow-up Transfer Status



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

The screenshot displays the SAP CRM interface for a Sales Quote process. The main area shows four tables: Sales Quotes (0), Sales Orders (0), Contracts (1), and External Follow-Up Documents (0). The 'Contracts (1)' table is highlighted with a red dashed box and contains one record with ID 7709, description 'Process Flow: Quote to Sales Contract & delete Contract Items', and owner Daniela Silber. The 'Details' sidebar on the right is also highlighted with a red dashed box and shows the following information:

- Progress Won
- Document Type Sales Quote
- Account Pfizer Ireland Pharmaceutical2
- Primary Contact Chen
- Ship-To Pfizer Ireland Pharmaceutical2
- Status Completed
- Approval Status Approval not Necessary
- External Reference ZOD DONT TOUCH QUOTE2CONTRACT
- Description Process Flow: Quote to Sales Contract & delete Contract Items
- Date 05.09.2018
- Requested Date 06.09.2018
- Reason for Rejection -
- Overall Discount (%) -
- Total 15.700,00EUR
- Payment Terms Payable immediately due net
- Incoterms Airborne Express
- Incoterms Location Sankt-Ingbert
- Delivery Priority Immediate
- Chance of Success 70%
- Valid To 10.09.2018
- Owner Daniela Silber
- Sales Unit Almica Germany
- Distribution Channel Direct sales
- Division -
- Sales Office Almica Germany
- Sales Group Almica Germany
- Territory Germany
- Follow-up Transfer Status -



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

Sales Quotes

Contract 7709 - Process Flow: Quote L...

1 Your entries have been saved.

7709 - Process Flow: Quote to Sales Contract & delete Contract Items

Related Contracts Opportunities Involved Parties Document Flow Changes Workflow Changes Notes Attachments **Items** Pricing Transfer Log

Items (0)

Line	Image	Type	Determination ...	Status	Product ID	Description	Target Quantity	Releas...	Begins On	Ends
No data										

Contract Option Sales Contract
Type Sales Contract
Status In Preparation
Consistency Status Consistent
ID 7709
External ID -
External Reference -
Transfer Status -



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

The screenshot displays the SAP Sales Contract interface. The main area shows a table with 7 products. The details sidebar on the right is expanded to show 'Set-up Details'.

Line	Product ID	Description	Price	Price Unit	Net ...	Gross...	Volu...	A
10	MDECC-DS02	MDECC-DS02	10,00 EUR	1 ea				
20	MDECC-DS02	CUST 15012016	20,00 EUR	1 ea				
30	MDECC-DS02	CUST 15012016	30,00 EUR	1 ea				
100		Text Item						
200	MDECC-DS05	MDECC-DS05	200,00 EUR	1 ea				

Details sidebar (Set-up Details):

- Progress: Pending
- Document type: Sales Quote
- Account: Pfizer Ireland Pharmaceutical2
- Primary Contact: Chen
- Ship-To: Pfizer Ireland Pharmaceutical2
- Status: Open
- Approval Status: Approval not Necessary
- External Reference: ZOD DONT TOUCH QUOTE2CONTRACT



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

The screenshot displays the SAP S/4HANA interface for a Sales Contract. At the top, the breadcrumb navigation shows 'Sales Quotes' and 'Contract 7709 - Process Flow: Quote to Sales C...'. The main header is '9973 - Process Flow: Quote to Sales Contract & delete Contract Items'. Below this are tabs for Overview, Products, Involved Parties, Document Flow, Sales Documents, Attachments, Pricing, Approval, Activities, Output, Feed, and Changes.

Three data tables are visible:

- Sales Quotes (0):** A table with columns ID - Description, External Reference, Date, and Owner. It shows 'No data'.
- Sales Orders (0):** A table with columns ID - Description, External Reference, Date, and Owner. It shows 'No data'.
- Contracts (1):** A table with columns ID - Description, External Reference, and Owner. A red dashed box highlights the 'New' button in the top right corner.

An inset window shows a detailed view of a contract: '7710 - Process Flow: Quote to 2nd Sales Contr. for deleted items of 1st Contr.'. This window has tabs for Overview, Sales Quotes, Sales Orders, Related Contracts, Opportunities, Involved Parties, Document Flow, Changes, Workflow Changes, and Notes. It features:

- Items (3):** A table with columns Line, Image, Status, Product ID, Description, Target Qua..., Begins On, Ends On, and Net... Two items are listed: Line 100 (MDP-C-DS) and Line 200 (MDECC-DS05).
- Organizational Data:** A section showing Sales Organization (Almrica Germany), Sales Unit (Almrica Germany), Distribution Channel (Direct sales), Division, and Territory (Germany).
- Contract Details:** A sidebar on the right showing Contract Option (Sales Contract), Type (Sales Contract), Status (In Preparation), Consistency Status (Consistent), ID (7710), External ID, External Reference, Transfer Status, External Status, External Reference Status, External Invoicing Status, Name (Process Flow: Quote to 2nd Sales Contr. for deleted items of 1st Contr.), Signed On, and Begins On (06.09.2018).



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

9973 - Process Flow: Quote to Sales Contract & delete Contract Items

Sales Quotes (0)

ID - Description	External Reference	Date	Owner
No data			

Sales Orders (1)

ID - Description	External Reference	Date	Owner
9000016569 - Process Flow...	ZOD DON'T TOUCH QUOT...	05.09.2018	Eddie Smoke

Contracts (2)

ID - Description	External Reference	Owner
7709 - Process Flow: Quote to Sales Contract & delete Contract Items		Daniela Silber
7710 - Process Flow: Quote to 2nd Sales Contr. for deleted items of 1st Contr.		Daniela Silber

Details

- Progress: Won
- Document Type: Sales Quote
- Account: Pfizer Ireland Pharmaceutical2
- Primary Contact: Chen
- Ship-To: Pfizer Ireland Pharmaceutical2
- Status: Completed
- Approval Status: Approval not Necessary
- External Reference: ZOD DON'T TOUCH QUOTE2CONTRACT
- Description: Process Flow: Quote to Sales Contract & delete Contract Items
- Date: 05.09.2018
- Requested Date: 06.09.2018
- Reason for Rejection: -
- Overall Discount (%): -
- Total: 15.700,00EUR



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 1811 for Contracts

Subject to Change

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

Incoterms Header and Item

The screenshot displays the SAP S/4HANA interface for a contract. The top section shows contract details for '7674 - YT20180831-ECC-1'. The 'Incoterms' field is highlighted with a red box and contains the value 'Free on board'. The 'Incoterms Location' field is also highlighted with a red box and contains the value 'Bangalore'.

The bottom section shows the 'Items (2)' table with the following data:

Line	Parent Line	Image	Type	Product ID	Determination Relevance
10			Quantity - Sales Contract Item	MDECC-DS02	Limited to Item
20			Quantity - Sales Contract Item	MDECC-DS01	Limited to Item

Below the table, the 'General Data' tab is selected, showing the following details:

- Description: MDECC-DS02 (ERP)
- Status: In Preparation
- Incoterms: Free on board (highlighted with a red box)
- Incoterms Location: Bangalore (highlighted with a red box)

Business Description

- the Incoterms rules are intended primarily to clearly communicate the tasks, costs, and risks associated with the global or international transportation and delivery of goods. Incoterms inform sales contracts defining respective obligations, costs, and risks involved in the delivery of goods from the seller to the buyer, but they do not themselves conclude a contract, determine the price payable, currency or credit terms, govern contract law or define where title to goods transfers.

Topic Area: Incoterms # as Table Columns [Header]

SAP Cloud for Customer

Contracts

Contracts Expiring Soon (17) ▾

	ID and Name	External ID	Status	Begins On	Transfer Status	Customer	Incoterms	Incoterms Location
<input type="checkbox"/>	7667 - SAMPL...	40002998	Active	21.08.2...	Finished	Pfizer Ireland Pharmaceut...	Free on board	Bangalore
<input type="checkbox"/>	7674 - YT2018...		In Prepa...	31.08.2...		Pfizer Ireland Pharmaceut...	Free on board	Bangalore
<input type="checkbox"/>	7659 - YT2018...		Active	31.08.2...		Pfizer Ireland Pharmaceut...	Free on board	Bangalore
<input type="checkbox"/>	7661 - YT2018...	40003048	Active	31.08.2...	Finished	Pfizer Ireland Pharmaceut...	Free on board	Bangalore
<input type="checkbox"/>	7656 - YT		Active	31.08.2...		Pfizer Ireland Pharmaceut...		
<input type="checkbox"/>	7522 - test ral...		In Prepa...	16.08.2...		Pfizer Ireland Pharmaceut...	Free on board	Bangalore
<input type="checkbox"/>	7501 - SB bou...	40003030	Active	16.08.2...	Finished	Pfizer Ireland Pharmaceut...	Free on board	Bangalore
<input type="checkbox"/>	6779	40002857	Active	05.04.2...	Finished	Orange Inc.		
<input type="checkbox"/>	6511 - AN QX...		In Prepa...	15.02.2...		Orange Inc.		
<input type="checkbox"/>	6502 - AN QX...	40002731	Active	15.02.2...	Finished	Orange Inc.		
<input type="checkbox"/>	6477	40002723	Active	15.02.2...	Finished	Orange Inc.		
<input type="checkbox"/>	6440 - ZCH-C...		In Prepa...	01.03.2...		Pfizer Ireland Pharmaceut...		
<input type="checkbox"/>	5893 - Contrac...	40002323	In Prepa...	27.09.2...	Finished	PricingAccount1		
<input type="checkbox"/>	5878 - Contrac...	40002309	In Prepa...	19.09.2...	Finished	PricingAccount1		
<input type="checkbox"/>	5872 - Contrac...	40002301	In Prepa...	15.09.2...	Finished	PricingAccount1		

Topic Area: Incoterms # in Advanced Search

Contracts Contract 7674 - YT20180831-ECC-1

Contracts Expiring Soon (17) ▾

General Data

ID	<input type="text"/>	+>	Name	<input type="text"/>	+>
Incoterms	<input type="text" value="Incoterms"/> ▾	+>	Incoterms Location	<input type="text"/>	+>
External Reference	<input type="text"/>	+>	Signed On	Filter by Date ▾	+>
				<i>dd.MM.yyyy</i>	

Topic Area: Incoterms # in Quick Create

Contracts | New Contract

Type Service Contract	Contract Template
Status In Preparation	ID 7775
External Reference	Name
Signed On dd.MM.yyyy	Begins On dd.MM.yyyy
Ends On dd.MM.yyyy	Service Level
Customer	Contact
Ship-To	Incoterms
Incoterms Location	Administrator

- Airborne Express
- Cost and freight
- Cost, insurance and freight
- Carriage and insurance paid to
- Carriage paid to
- Delivered at frontier
- Delivered at place
- Delivered at terminal
- Delivered duty paid
- Delivered duty unpaid
- Delivered ex quay (duty paid)
- Delivered ex ship
- DHL Worldwide Express
- Emery Worldwide

Topic Area: Incoterms # in Changes

Contracts

Contract
7674 - YT20180831-ECC-1

7674 - YT20180831-ECC-1

Overview Sales Quotes Sales Orders Related Contracts Opportunities Involved Parties Document Flow **Changes**

To display or refresh the change history, specify the required filter criteria and click Go.

Changes Made From
dd.MM.yyyy

Changes Made To
dd.MM.yyyy

Attribute

- Incoterms
- Incoterms (Item)
- Incoterms Location
- Incoterms Location (Item)

Changed By User

What's New in 1811 for Contracts

Subject to Change

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

Contract: Form Template Selection

The screenshot displays the SAP Cloud for Customer interface for contract management. It features three main components:

- Form Template Selection (Top):** A table with columns for Sequence, Document Type, Account, Contract Option, and Form Template.

Sequence	Document Type	Account	Contract Option	Form Template
1	*	Timbuktu Heating_TI-HQ	*	Z Contract Summary
2	Support&Repair [Service] Contract	*	Service Contract	Contract Summary (Demo)
3			*	Contract Summary
- New Contract (Left):** A form for creating a new contract.
 - Type: Support&Repair [Service] Contract
 - Contract Template: [Empty]
 - Status: In Preparation
 - ID: 7586
 - External Reference: [Empty]
 - Name: Demo for Form Template Selection
 - Signed On: 17.08.2018
 - Begins On: 17.08.2018
 - Ends On: 18.08.2018
 - Service Level: [Empty]
 - Customer: Luxury Heating & Cooling Co
 - Contact: Michael Evans
 - Administrator: Alexandra Mark
 - Owner: John Kim
 - Territory: Massachusetts
 - Time Zone: (UTC+01:00) Central European Tim
- Contract Preview (Right):** A preview of the 'Z Contract Summary (Demo)' form.
 - Title: Contract Demo 1360
 - Page: 1/3
 - Customer: Norman Miller O'Sullivan Ltd, 31 Pottery Rd, Dublin 99999989, CO CLARE, IRELAND.
 - Your Reference: EXT REF 123
 - Contact: Norman Miller, +1 205-013-345
 - Phone: +1 205-013-345
 - Fax: +353 (1) 01-343 347
 - E-Mail: test.abc@delf.com
 - Name: Contract Standard Gold
 - Service Level: Superior Service Level US (EST)
 - Status: Active
 - Signed On: Sep 18, 2015
 - Begins On: Oct 1, 2015
 - Ends On: Sep 30, 2020
 - Created On: Sep 11, 2015
 - Changed On: Sep 17, 2015
 - Time Zone: CET
 - Net Value: 1,275.0 EUR
 - Total: 1,479.0 EUR
 - Overall Net Value: 2,550.0 EUR
 - Pricing Date: Sep 11, 2015
 - Sales Unit: Almica Germany
 - Sales Organization: Almica Germany
 - Division: Division 01
 - Distribution Channel: Direct sales

Business Description

- Rules based Form template association to contracts using Parameters of a contract such as Account or Contract type

Key Business Benefits

- Flexible usage of different Forms for Contract, e.g. for Sales/ Service Contracts and/or related to a Customer

Topic Area: Form Template Selection # Set-Up 1

2
1

GEMENT CUSTOMERS PEOPLE SALES ANALYSIS PRODUCTS DATA CLEANSING DATA WORKBENCH ODATA **ADMINISTRATOR** < > ...

GENERAL SETTINGS USERS SERVICE AND SOCIAL SALES AND CAMPAIGN SETTINGS **BUSINESS FLEXIBILITY** INPUT AND OUTPUT MAN/ < > ...

FORM TEMPLATE MAINTENANCE: ACTIVE FORMS (3)
 Export Open Copy Upload Download Publish Delete Versions Actions

You can edit the content and layout of language-specific and country-specific form templates online. You can also download a form template, edit it offline, and upload the edited template. You can create new form templates by using the copy or upload functions. You can also revert to older versions of the form template, and activate upgrades provided by SAP or partners. Additionally, you can upload e-mail templates for certain active form templates by using the create e-mail template function.

Active Forms

Template Group: Contract Created By:
 Country: Language: Status:
 Form Master Template: Template Type:

Go Reset Save Query Organize Queries

Status	Form Template	Country	Language	Description	Form Template Group	E-mail Template
Contract Summary (2)						
	Contract Summary		Danish	Contract Summary	Contract	No
	Contract Summary		English	Contract Summary	Contract	No
Z Contract Summary (1)						
	Z Contract Summary		English	Z Contract Summary	Contract	No

Details: Contract Summary -

General Information Country: Language: English Template Type: Print Form Description: Contract Summary Status: Published Form Master Template: In Use	Administrative Data Created By: Alexandra Mark Created On: 27.03.2017 14:29 Changed By: Alexandra Mark Changed On: 27.03.2017 14:29
--	--

Topic Area: Form Template Selection # Set-Up 2

The screenshot illustrates the process of creating a new form template by copying an existing one. It is divided into two main parts: the source system and the target dialog.

Source System (Left):

- Navigation: GENERAL SETTINGS, USERS, SERVICE AND SO.
- Section: FORM TEMPLATE MAINTENANCE: ACTIVE FORMS (3).
- Actions: Export, Open, Copy (circled 4), Upload, Download, Publish, Delete.
- Context: Active Forms.
- Filters: Template Group: Contract, Country: [dropdown], Language: [dropdown], Status: [dropdown].
- Buttons: Go, Reset, Save Query, Organize Queries.
- Table:

Status	Form Template	Country
Contract Summary (2)		
	Contract Summary	
	Contract Summary	
Z Contract Summary (1)		
	Z Contract Summary	

Target Dialog (Right):

- Title: New Template Copied from Z Contract Summary -
- Text: You can create a new form template. Enter a new template name and description.
- Fields: * Template Name: Z Contract Summary (Demo), Template Description: Z Contract Summary (Demo).
- Dropdowns: Country: [dropdown], * Language: E.
- Form Master Template: In Use.
- Buttons: OK, Cancel.

A yellow arrow points from the 'Copy' button in the source system to the dialog box.

Topic Area: Form Template Selection # Set-Up 3

GENERAL SETTINGS USERS ▼ SERVICE AND SOCIAL SALES AND CAMPAIGN SETTINGS **BUSINESS FLEXIBILITY ▼** |

FORM TEMPLATE MAINTENANCE: ACTIVE FORMS (4)

Export Open **Copy** Upload Download Publish Delete Versions Actions

You can edit the content and layout of language-specific and country-specific form templates online. You can also download a form template, edit it offline, and upload the edited template. You can create and upload functions. You can also revert to older versions of the form template, and activate upgrades provided by SAP or partners. Additionally, you can upload e-mail templates for certain active form template functions.

Active Forms

Template Group: Created By:

Country: Changed By:

Language: Form Master Template:

Status: Template Type:

Go Reset Save Query Organize Queries

Status	Form Template	Country	Language	Description	Form Template
▼ Contract Summary (2)					
	Contract Summary		Danish	Contract Summary	Contract
	Contract Summary		English	Contract Summary	Contract
▼ Z Contract Summary (1)					
	Z Contract Summary		English	Z Contract Summary	Contract
▼ Z Contract Summary (Demo) (1)					
	Z Contract Summary (Demo)		English	Z Contract Summary (Demo)	Contract

Details: Z Contract Summary (Demo) -

General Information	Administrative Data
Country:	Created By: Alexandra Mark
Language: English	Created On: 17.08.2018 10:24
Template Type: Print Form	Changed By: Alexandra Mark
Description: Z Contract Summary (Demo)	Changed On: 17.08.2018 10:24
Status: Not Published	
Form Master Template: In Use	

Topic Area: Form Template Selection # Set-Up 4

GENERAL SETTINGS USERS ▼ SERVICE AND SOCIAL SALES AND CAMPAIGN S

FORM TEMPLATE MAINTENANCE: ACTIVE FORMS (4)

Export Open Copy Upload **Download** Publish **6** Delete Versions Actions

You can edit the content and layout of language-
upload functions. You can also revert to older ve
function.

Download the selected form template, schema
and sample data for offline editing.

Active Forms

Template Group: Contract

Country:

Language:

Status:

Go Reset Save Query Organize Queries

Status	Form Template	Country	Language
Contract Summary (2)			
	Contract Summary		Danish
	Contract Summary		English
Z Contract Summary (1)			
	Z Contract Summary		English
Z Contract Summary (Demo) (1)			
	Z Contract Summary (Demo)		English

Topic Area: Form Template Selection # Set-Up 5

SETTINGS USERS SERVICE AND SOCIAL SALES AND CAMPAIGN SETTINGS BUSINESS FLEXIBILITY

FORM TEMPLATE MAINTENANCE: ACTIVE FORMS

Export Open Copy Upload **Download** Publish Delete Versions Actions

You can edit the content and layout of a form template online. You can also download a form template, edit it offline, and upload the edited template to replace an existing variant. You can also upload e-mail templates for contract variants. You can also upload e-mail templates for contract variants.

As New Variant **To Replace Existing Variant**

Active Forms

Template Group: C36 Created By: Country: Language: Status: Form Master Template: Template Type:

Go Reset Save Query Organize Queries

Status	Form Template	Country	Language	Description
Contract Summary (2)				
	Contract Summary		Danish	Contract Summary
	Contract Summary		English	Contract Summary
Z Contract Summary (1)				
	Z Contract Summary		English	Contract Summary
Z Contract Summary (Demo) (1)				
	Z Contract Summary (Demo)		English	Z Contract Summary (Demo)

Details: Z Contract Summary (Demo) -

General Information	Administrative Data
Country: Language: English	Created By: Alexandra Mark
Template Type: Print Form	Created On: 17.08.2018 10:24
Description: Z Contract Summary (Demo)	Changed By: Alexandra Mark
Status: Not Published	Changed On: 17.08.2018 10:24
Form Master Template: In Use	



Set-up Details

- Download ZIP File
- Edit XDP file with local ADOBE LifeCycle Designer
- Upload changed XDP file
- Publish

Name	Date modified	Type	Size
ContractSummary_ContractSummary_E...	20.07.2018 17:11	XML File	20 KB
ContractSummary_EN - Demo.xdp	17.08.2018 10:36	XDP File	744 KB
ContractSummary_EN.xdp	20.07.2018 17:23	XDP File	744 KB

Open Cancel

9

Replace Existing Variant of Z Contract Summary (De... X

You can upload a form template that you have edited offline in XDP format to replace the selected country and/or language specific variant.

* File: ContractSummary_EN Browse

Template Group: Contract
 Template Name: Z Contract Summary (Demo)
 Description: Z Contract Summary (Demo)
 Country: Language: English

OK Cancel

Topic Area: Form Template Selection # Set-Up 6

SETTINGS USERS ▼ SERVICE AND SOCIAL SALES AND CAM

FORM TEMPLATE MAINTENANCE: ACTIVE FORMS (4)

Export Open Copy Upload Download Publish Delete Versions Active

You can edit the country-specific and country-specific form templates online. You can also upload new form templates, create new form templates, and activate upgrades pro function.

Easy Form Editor
Adobe Reader

11

Active Forms

Template Group: C36

Country: [Dropdown]

Language: [Dropdown]

Status: [Dropdown]

Go Reset Save Query Organize Queries

Status	Form Template	Country
▼ Contract Summary (2)		
	Contract Summary	
	Contract Summary	
▼ Z Contract Summary (1)		
	Z Contract Summary	
▼ Z Contract Summary (Demo) (1)		
	Z Contract Summary (Demo)	

Details: Z Contract Summary (Demo) -

General Information

Country:

Language: English

Template Type: Print Form

Description: Z Contract Summary (Demo)

Status: Published

Form Master Template: In Use



Z Contract Summary (Demo)

Country: Language: English Form Master Template: In Use Status: Published

Close

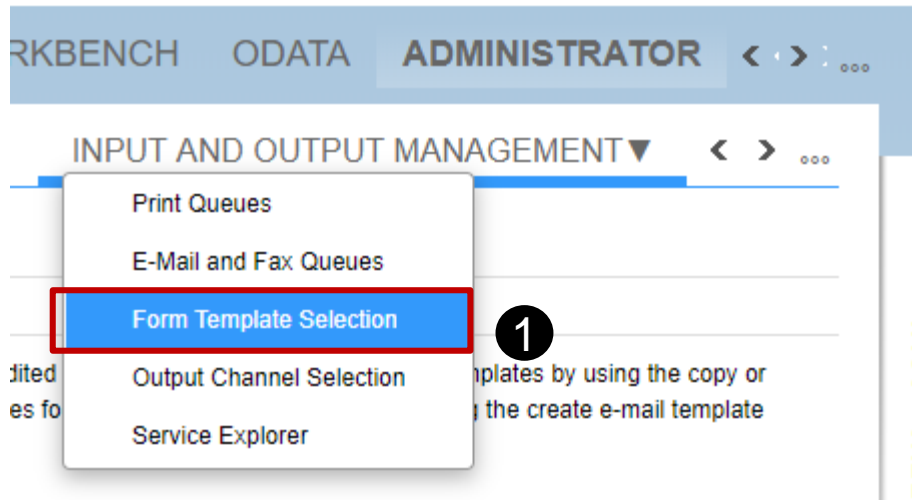
Open file in a separate browser window

Contract Demo 1360

place holder Page: 1/3

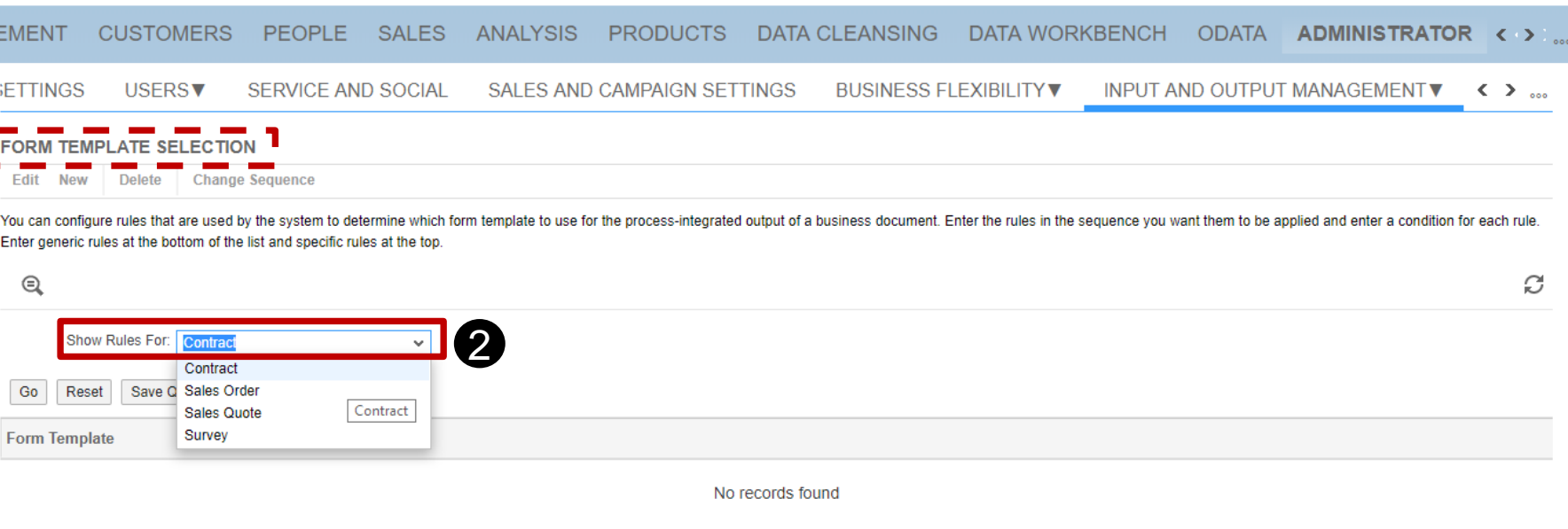
Norman Miller O'Sullivan Ltd 1 Pottery Rd Dublin 99999989 CO CLARE IRELAND	Your Reference: EXT REF 123 Contact: Norman Miller Phone: +1 205-012-345 Fax: +353 (1) 01-343 347 E-Mail: test.abc@defg.com
Name: Contract Standard Gold Service Level: Superior Service Level US (EST) Status: Active	Signed On: Sep 18, 2015 Begins On: Oct 1, 2015 Ends On: Sep 30, 2020 Created On: Sep 11, 2015 Changed On: Sep 17, 2015 Time Zone: CET
Net Value: 1,275.0 EUR Total: 1,479.0 EUR Overall Net Value: 2,550.0 EUR Pricing Date: Sep 11, 2015	Sales Unit: Almica Germany Sales Organization: Almica Germany Division: Division 01 Distribution Channel: Direct sales

Topic Area: Form Template Selection # Configuration 1



Set-up Details

- Open Work Center Input and Output Management
- Select Form Template Selection
- Select Rules for Contract



Topic Area: Form Template Selection # Configuration 2

Form Template Selection

Status: ● Rules are Active

Version: 1 [All Versions](#)

Last Changed By: Alexandra Mark

Last Changed On: 05.07.2018 13:42 CET

Rules 3

[Add Row](#)
[Insert Row](#)
[Remove](#)
[Copy](#)
[Paste](#)
[Swap](#)
[Adapt Columns](#)

[Upload](#)
[Download](#)

Sequence	Document Type	Account	Contract Option	Form Template
1	*	Timbuktu Heating_TI-HQ	*	Z Contract Summary
2	Support&Repair [Service] Contract (...	*	Service Contract	Z Contract Summary (Demo)
3	*	*	*	Contract Summary

Decision Table Configuration ✕

Configure the decision table by rearranging its columns.

Available Columns (16) Column: [Search](#)

- Column
- AO_EXT_Test1
- AccountMV
- Category
- E-Mail DateTime
- E-Mail Survey
- EXT_REL2
- Incoterms Version ▶
- Sales Organization ◀
- Sales Unit

Current Columns (Max.20) (4) ↑ ↓

- Column
- Document Type
- Account
- Contract Option
- Form Template



Set-up Details

- The following parameters can be configured [via 'Adapt Columns'] for Contract Forms determination
 - Sales Organization
 - Sales Unit
 - Document Type
 - Account
 - Contract Option
 - Form Template

Topic Area: Form Template Selection # Configuration 3

Form Template Selection

Status: Rules are Inactive

Version: 2 All Versions

Last Changed By: Alexandra Mark

Last Changed On: 25.07.2018 15:25 CET

RULES

Add Row Insert Row Remove Copy Paste Swap Adapt Columns Upload Download

Sequence	Document Type	Account	Contract Option	Form Template
1	*	Timbuktu Heating_TI-HQ	*	Z Contract Summary
2	*	*	*	Contract Summary
3	*	*	*	*

Form Template

Enter Value: [C3601 Contract Summary]

- C3601 Contract Summary
- ZBXL7 Z Contract Summary (Demo)
- ZDIIIU Z Contract Summary

OK Cancel Clear

Save Close Actions

TADS SHELF HELP CENTER FEED EMPLOYEES PRODUCTS

Topic Area: Form Template Selection # Configuration 4

The screenshot displays the 'Form Template Selection' configuration interface. On the left, there is a sidebar with status information: 'Status: Rules are inactive', 'Version: 2', and 'Last Changed On: 25.07.2018 15:25 CET'. The main area is titled 'RULES' and contains a table with columns: Sequence, Document Type, Account, Contract Option, and Form Template. A red dashed arrow points from a circled '5' in the 'Document Type' column of the first row to a 'Document Type' dialog box. The dialog box has a 'Select Operator' dropdown set to 'Equal' and an 'Enter Value' dropdown with a list of document types. The list includes: SLCO - Sales Contract, SRCO - Service Contract, ZBMZ - zbm hmi5 testings, ZCH1 - ZCH V Contract - Test, ZIRQ - Z Sales Contract - Inbound Only, ZIRS - Z Service Contract - Inbound Only, ZLA0 - ZLA0-ZODSL Always Sync Pricing, ZLA1 - ZLA1-ZODSL Skip AfterRepl Sync Pricing, ZLA2 - ZLA2-ZODSL Skip Always Sync Pricing, and ZLA3 - ZLA3-ZODSL Not ext System Relevant. The dialog box also has 'OK', 'Cancel', and 'Clear' buttons.

Sequence	Document Type	Account	Contract Option	Form Template
1		Timbaktu Heating_TI-HQ	-	Z Contract Summary
2		-	-	Contract Summary
3		-	-	Z Contract Summary (Demo)

Document Type Selection Dialog:

- Select Operator: Equal
- Enter Value: [Dropdown]
- SLCO - Sales Contract
- SRCO - Service Contract
- ZBMZ - zbm hmi5 testings
- ZCH1 - ZCH V Contract - Test
- ZIRQ - Z Sales Contract - Inbound Only
- ZIRS - Z Service Contract - Inbound Only
- ZLA0 - ZLA0-ZODSL Always Sync Pricing
- ZLA1 - ZLA1-ZODSL Skip AfterRepl Sync Pricing
- ZLA2 - ZLA2-ZODSL Skip Always Sync Pricing
- ZLA3 - ZLA3-ZODSL Not ext System Relevant

Topic Area: Form Template Selection # Configuration 5

The screenshot displays the 'Form Template Selection' configuration window. On the left, a sidebar shows the status 'Rules are Inactive', version '2', and user 'Alexandra Mark'. The main area is titled 'RULES' and contains a table with the following data:

Sequence	Document Type	Account	Contract Option	Form Template
1	*	Timbuktu Heating_TI-HQ	*	Z Contract Summary
2	*	*	*	Contract Summary
3	Support&Repair [Service] Contra...	*	*	Z Contract Summary (Demo)

A red dashed arrow points from the 'Contract Option' column of the third row to a dialog box titled 'Contract Option'. The dialog box has a 'Select Operator' dropdown set to 'Equal' and an 'Enter Value' dropdown menu. The dropdown menu is open, showing the following options:

- 508 Service Contract
- 539 Sales Contract
- 508 -- Service Contract

The dialog box also includes 'OK', 'Cancel', and 'Clear' buttons at the bottom.

Topic Area: Form Template Selection # Configuration 7

The screenshot shows the 'Form Template Selection' configuration page. On the left, there is a sidebar with status information: 'Status: Rules are Inactive', 'Version: 2', and 'Last Changed On: 17.08.2018 13:36 CET'. The main area is titled 'RULES' and contains a table with columns: Sequence, Document Type, Account, Contract Option, and Form Template. The table has three rows. Row 3 is selected. A red dashed box highlights the 'Swap' button in the toolbar above the table. A red circle with the number '7' is placed above the 'Swap' button. A red dashed arrow points from the 'Swap' button to a 'Swap rules' dialog box. The dialog box has a title bar 'Swap rules' and a close button. It contains two input fields: 'From Sequence No.: 3' and 'To Sequence No.: 2'. There are 'OK' and 'Cancel' buttons at the bottom of the dialog.

Sequence	Document Type	Account	Contract Option	Form Template
1	*	Timbuktu Heating_TI-HQ	*	Z Contract Summary
2	*	*	*	Contract Summary
3	Support&Repair [Service] Contra...	*	Service Contract	Z Contract Summary (Demo)




Set-up Details

- Via 'Swap' the Sequence of Rule consideration can be determined

Topic Area: Form Template Selection # Configuration 8

Form Template Selection

Status:  Rules are Inactive

Version: 2 [All Versions](#)

Last Changed By: Alexandra Mark
Last Changed On: 17.08.2018 13:36 CET

RULES

[Add Row](#) [Insert Row](#) [Remove](#) [Copy](#) [Paste](#) [Swap](#) [Adapt Columns](#) [Upload](#) [Download](#)

[Refresh](#)

Sequence	Document Type	Account	Contract Option	Form Template
1	*	Timbuktu Heating_TI-HQ	*	Z Contract Summary
2	Support&Repair [Service] Cont...	*	Service Contract	Z Contract Summary (Demo)
3	*	*	*	Contract Summary

[Click to Select](#)

8

[Save](#) [Close](#) [Activate Rules](#)



Set-up Details

- Finally the Rules Setting has to be activated

What's New in 1811 for Contracts

Subject to Change

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

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- 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

Contract: Extension Flow -Sales Arrangement to Contract

The screenshot displays the SAP S/4HANA interface for a contract extension flow. The main header shows the contract ID '7726 - Extension Flow: Sales Data 2 Contract'. Below this, there are several tabs: Overview, Covered Objects, Tickets, Related Contracts, Opportunities, Maintenance Plan, Involved Parties, and Document Flow. The 'Overview' tab is active, showing three main sections: 'Items (0)', 'Covered Objects (0)', and 'Related Contracts (0)'. Each section contains a table with columns for various attributes, but all are currently empty, displaying 'No data' or 'All objects covered'. On the right side, there is a 'Consistency Status' panel with various fields. Two fields are highlighted with red boxes: 'Customer' with the value 'Hardware Franke KG' and 'Incoterms Version' with the value 'German HGB'.

Line	Image	Status	Product ID	Description	Quantity	Target Quantity
No data						

Image	Product Category ID	Product Category	Product ID	Product	Serial ID	Registered Product Description
All objects covered						

ID	Name	Ends On	Status
No data			

Consistency Status

- Consistency Status: Consistent
- ID: 7726
- External Invoicing Status: -
- Name: Extension Flow: Sales Data 2 Contract
- Customer: **Hardware Franke KG**
- Contact: Daniela Junkers
- Ship-To: Hardware Franke KG
- Administrator: Volker Kampen
- Owner: Bob Menson
- Time Zone: (UTC+00:00) Greenwich Mean Time with daylight saving time (UK)
- Reason for Rejection: -
- Is Template: No
- Payment Terms: -
- Incoterms: -
- Incoterms Location: -
- Determination Relevance of Covered Objects: Consider Header Covered Objects
- Incoterms Version: **German HGB**

Business Description

- Via Extension Flow it is possible to associate automatically the content of a Customer Extension Field [e.g. 'Incoterms Version'] established in the table 'Sales Data' of a Customer [e.g. Hardware Franke AG] to the extension field section 'Overview' of his Contract
- Prerequisite is that Extension Fields in Customer and Contracts are related via Rule

Contract: Extension Flow -Sales Arrangement to Contract- #2

Customer: Hardware Franke KG

Status: Active
unit-test-label: Hardware Franke KG
Prospect:
*Role: Customer
Address: Eichholz 238
20459 Hamburg
Germany
Phone: +49 40 525-2316
Fax: +49 40 525-2320
Parent Account:
Web Site:
Main Contact: Daniela Junkers
Owner:

Sales Data (2)

Sales Organization	Distribution Channel	Division	Sales Office	Incoterms
DE Region Nord - Ost	Direct sales		German HGB	
Region North & East Coa...	Direct sales		German HGB	

Details

Customer Group:
Incoterms Version: German HGB
Incoterms:
Incoterms Location:
Sales Support Block:
Price List:

Payment Terms:
Order Block:
Delivery Block:
Billing Block:
Price Group:
Dilip: Ext scenario 2:

Field Definition Dialog:

- Read only
- Visible
- Sort: Ascending Code
- Display: Value Only
- Field Definition

Contract: 7588 - AO Incoterms Contract

Type: Service Contract
Consistency Status: Consistent

Items

Line	Im...	Status	Product ID	Description	Quantity	Ta...	B...
No records found							

Related Contracts

ID	Name	Ends On	Status
No records found			

Organizational Data

Sales Organization: Region North & East Coast US

Field Definition Dialog:

- Mandatory
- Read only
- Visible
- Sort: Ascending Code
- Display: Value Only
- Field Definition

1: Edit Master Layout

2: Incoterms Version: German HGB

3: Field Definition



Set-up Details

- Create Extension Fields in table 'Sales Data' of a Customer and 'Overview' of his Contract
- Prerequisite is that Extension Fields in Customer and Contracts are related via Rule

Contract: Extension Flow -Sales Arrangement to Contract- #3

Edit Field
IncotermsVersion
Account - Sales Data

Type: List
Default Value: German HGB
Data Protection Level: None
Created By: ORBATI
Created On: 24.08.2018 11:51:28
Last Changed By: ORBATI
Last Changed On: 24.08.2018 12:00:26

Extension Scenario	Field Added
> Account - Sales Area Data to Pricing	<input type="checkbox"/>
> Account - Sales Data to Activity - General Information	<input type="checkbox"/>
> Account - Sales Data to Contract - General Information	<input checked="" type="checkbox"/>
> Account - Sales Data to Sales Document - General Information	<input checked="" type="checkbox"/>
> Account - Sales Data to Service Request - General Information	<input checked="" type="checkbox"/>

Applied Extension Scenarios

Extension Scenario	Field Added
> Account - Sales Data to Contract - General Information	<input checked="" type="checkbox"/>
> Sales Data - Sales Data to Contract - General Information	<input checked="" type="checkbox"/>
> Account - Sales Data to Sales Document - General Information	<input checked="" type="checkbox"/>
> Account - Sales Data to Service Request - General Information	<input checked="" type="checkbox"/>

4



Set-up Details

- Prerequisite is to apply the extension fields [e.g. Incoterms Version] via Rule 'Account – Sales Data to Contract – General Information' for Customer and Contract...



Edit Field
IncotermsVersion
Contract - General Information

Type: List
Default Value: German HGB
Data Protection Level: None
Created By: ORBATI
Created On: 27.08.2018 09:41:45
Last Changed By: JINGERSOLL_HAASC1
Last Changed On: 03.09.2018 16:45:19

Extension Scenario	Field Added	Additional Information	Action
> Account - General Information to Contract - General Information	<input checked="" type="checkbox"/>	Scenario is deactivated	
> Business Partner - General Information to Contract - General Information	<input type="checkbox"/>		
> Account - Sales Data to Contract - General Information	<input checked="" type="checkbox"/>		
> Contract - General Information to Ticket - General Information	<input type="checkbox"/>		<input type="button" value="Add"/>
> Contract - General Information to Ticket - General Information	<input type="checkbox"/>		
> Sales Document - General Information to Contract - General Information	<input type="checkbox"/>		<input type="button" value="Add"/>
> Sales Quote - General Information to Contract - General Information	<input type="checkbox"/>		

Applied Extension Scenarios

Extension Scenario	Field Added	Additional Information	Action
> Account - General Information to Contract - General Information	<input checked="" type="checkbox"/>	Scenario is deactivated	<input type="button" value="Reactivate"/>
> Account - Sales Data to Contract - General Information	<input checked="" type="checkbox"/>		<input type="button" value="Deactivate"/>
> Account - Sales Data to Sales Document - General Information	<input checked="" type="checkbox"/>		<input type="button" value="Deactivate"/>
> Account - Sales Data to Service Request - General Information	<input checked="" type="checkbox"/>		<input type="button" value="Deactivate"/>

What's New in 1811 for Contracts

Subject to Change

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

Contract: Extension Flow - Product to Contract Item

The screenshot shows the SAP Product Overview for 'Laser Printer'. The 'AO Wowfactor' field is highlighted with a red box and contains the value 'Wow'. A 'Field Definition' dialog box is open over this field, with 'Field Definition' selected and highlighted in red. The dialog box contains the following options:

- Mandatory Rule
- Read only Rule
- Visible Rule
- Field Definition**

Buttons for 'Apply' and 'Cancel' are also visible in the dialog box.

Business Description

- Via Extension Flow it is possible to associate automatically the content of a Customer Extension Field [e.g. AO Wowfactor] established in the 'Overview' of Product to the extension field of section 'Items' in Contract[s]



Set-up Details

- Create Extension Fields in Overview of Products and 'Items' in Contract
- Prerequisite is that Extension Fields in Customer and Contracts are related via Rule

The screenshot shows the 'Edit Field' dialog for 'AOWowfactor' (Material - General Information). The 'Extension Scenarios' tab is active, showing a list of available extension scenarios. The 'Product - General Information to Contract - Item' scenario is selected and highlighted with a red box. The 'Field Added' column for this scenario is checked.

Extension Scenario	Field Added
Product - General Information to Contract - Item	<input checked="" type="checkbox"/>
Material - General Information to Contract - Item	<input checked="" type="checkbox"/>
Product - General Information to Lead - Item	<input type="checkbox"/>
Product - General Information to Opportunity - Item	<input type="checkbox"/>
Product - General Information to Pricing	<input type="checkbox"/>
Product - General Information to Product List - Product	<input type="checkbox"/>
Product - General Information to Sales Document - Item	<input type="checkbox"/>

What's New in 1811 for Contracts

Subject to Change

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 (...)
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 - Enable My Account Team in Business Partner value help

Contract: Copy/Paste from Excel [Items, Covered Objects, Entitled/ Excluded Services & Parts]

7778 - Paste/ Copy: Items, Multiple Covered Objects, Entitled Services

Overview Covered Objects Tickets Related Contracts Opportunities Maintenance Plan Involved Parties Document Flow Changes Workflow Changes Notes Attachments

Covered Objects (0)

Paste supported data, such as Excel, and fields separated by semicolons or tabs. The copied data should match the dataset fields.

Image	Product Category ID	Product Category	Product ID	Product	Serial ID	Registered Product Description	Installation Point ID	Installation Point Description
	50-10	WP Microwave	MCF-0001	AHT Combi 75	UEZ007-123	AHT COMBI 75 ue1	2908	
		1 Test 1708	MAT 10799	MAT_DESCP 10799				

Excel_Copy_Paste_Contracts.xlsx - Excel

File Home Insert Page Layout Formulas Data Review View PDF-XChange V6 Tell me what you want to do

Clipboard Font Alignment Number Styles Cells Editing

Copy/Paste Covered Objects

Business Description of Feature Here

- It is possible via Copy and Paste to upload MS Excel data to Covered Objects table
- 1:1 Column Structure needs to be considered

Key Business Benefits

- Acceleration of Contract set-up

Topic Area: Copy/Paste from Excel [Items, Covered Objects, Entitled/ Excluded Services & Parts]

The screenshot shows the SAP 'Covered Objects' interface. At the top, there is a navigation bar with tabs: Overview, Covered Objects (selected), Tickets, Related Contracts, Opportunities, Maintenance Plan, and Involved. Below the navigation bar, the title 'Covered Objects (0)' is displayed in a red dashed box. A text input field contains the placeholder text 'Paste supported data, such as Excel, ...'. Below this is a table with columns: Image, Product C, Product ID, Product, and Se. A context menu is open over the 'Paste' option, which is highlighted with a red rectangle. The menu items are: Undo (Ctrl+Z), Redo (Ctrl+Shift+Z), Cut (Ctrl+X), Copy (Ctrl+C), Paste (Ctrl+V), Paste as plain text (Ctrl+Shift+V), Select all (Ctrl+A), Spellcheck, Writing Direction, and Inspect (Ctrl+Shift+I).

Image	Product C	Product ID	Product	Se

Topic Area: Copy/Paste from Excel [Items, Covered Objects, Entitled/ Excluded Services & Parts]

Contracts

Contract 7778 - Paste/ Copy: Items, M...

1 Account PACH31137 of Serial ID UEZ007-123 does not fit to Contract Account MC6049.

7778 - Paste/ Copy: Items, Multiple Covered Objects, Entitled Services

Overview Covered Objects Tickets Related Contracts Opportunities Maintenance Plan Involved Parties Document Flow Changes Workflow Changes Notes Attachments

Covered Objects (2)

	Image	Product Category ID	Product Category	Product ID	Product	Serial ID	Registered Product De	Installation Point ID	Installation Point Des
<input type="checkbox"/>		50-10	WP Microwave	MCF-0001	AHT COMBI 75	UEZ007	AHT COMBI 75 ue1	2908	AHT COMBI 75 ue1
<input checked="" type="checkbox"/>		1	Test_1708	MAT_10799	MAT_DESCP_10799				

1 Selected

Contract: Copy/Paste from Excel [Items, Covered Objects, Entitled/ Excluded Services & Parts]

Items (0)

Paste supported data, such as Excel, and fields separated by semicolons or tabs. The copied data should match the dataset fields.

Line	Parent Line	Image	Type	Product ID	Quantity	Coverage
No data						

Excel_Copy_Paste_Contracts.xlsx - Excel

	A	B	C	D	E	F	G	H	I
4	Copy/Paste Items								
5		10			Standard item	10000477	2	Each	
6		20			Standard item	ZSW_T1	1	Each	

Business Description

- It is possible via Copy and Paste to upload MS Excel data to Contract Items table
- 1:1 Column Structure needs to be considered

Key Business Benefits

- Acceleration of Contract set-up

Topic Area: Copy/Paste from Excel [Items, Covered Objects, Entitled/ Excluded Services & Parts]

The screenshot shows the SAP 'Covered Objects' table. The table header includes columns for 'Image', 'Product C...', 'Product ID', 'Product', and 'Se'. The table body is currently empty, with a message 'All objects co...' visible. A context menu is open over the table, listing standard editing actions: Undo (Ctrl+Z), Redo (Ctrl+Shift+Z), Cut (Ctrl+X), Copy (Ctrl+C), Paste (Ctrl+V), Paste as plain text (Ctrl+Shift+V), Select all (Ctrl+A), Spellcheck, Writing Direction, and Inspect (Ctrl+Shift+I). The 'Paste' option is highlighted with a red rectangular border.

Image	Product C...	Product ID	Product	Se
All objects co...				

- Undo (Ctrl+Z)
- Redo (Ctrl+Shift+Z)
- Cut (Ctrl+X)
- Copy (Ctrl+C)
- Paste (Ctrl+V)**
- Paste as plain text (Ctrl+Shift+V)
- Select all (Ctrl+A)
- Spellcheck
- Writing Direction
- Inspect (Ctrl+Shift+I)

Topic Area: Copy/Paste from Excel [Items, Covered Objects, Entitled/ Excluded Services & Parts]

Contracts

Contract
7778 - Paste/ Copy: Items, M...

1 Account PACH31137 of Serial ID UEZ007-123 does not fit to Contract Account MC6049.

7778 - Paste/ Copy: Items, Multiple Covered Objects, Entitled Services

Overview Covered Objects Tickets Related Contracts Opportunities Maintenance Plan Involved Parties Document Flow Changes Workflow Changes Notes Attachments

Covered Objects (2)

Image	Product Category ID	Product Category	Product ID	Product	Serial ID	Registered Product De	Installation Point ID	Installation Point Desc
<input type="checkbox"/>	50-10	WP Microwave	MCF-0001	AHT COMBI 75	UEZ007	AHT COMBI 75 ue1	2908	AHT COMBI 75 ue1
<input checked="" type="checkbox"/>	1	Test_1708	MAT_10799	MAT_DESCP_10799				

1 Selected

Contract: Copy/Paste from Excel [Items, Covered Objects, Entitled/ Excluded Services & Parts]

The screenshot shows the SAP Contract Management interface. The top navigation bar includes 'Contracts', 'Contract 7778 - Paste/ Copy: Items, Multiple Co...', and a list of tabs: 'Related Contracts', 'Opportunities', 'Maintenance Plan', 'Involved Parties', 'Document Flow', 'Changes', 'Workflow Changes', 'Notes', 'Attachments', 'Items', 'Pricing', 'Transfer Logs', and 'Release'. The 'Items' tab is active, showing a table with columns: Line, Parent Line, Image, Type, Product ID, Quantity, and Coverage. Row 10 is selected. A red dashed box highlights the 'Items' table. A red solid box highlights the 'Entitled Services and Parts' table, which has columns: Image, Product Category, Product ID, Description, and Action. A red arrow points from the 'Entitled Services and Parts' table to the 'Excel_Copy_Paste_Contracts.xlsx' file in the background. The Excel file is open in a window, showing a table with columns A, B, C, D, and E. Row 7 is highlighted in yellow, and rows 8, 9, and 10 are highlighted in green. A red dashed box highlights the data in the Excel file. A red solid box highlights the 'Entitled Services and Parts' table. A red arrow points from the 'Entitled Services and Parts' table to the 'Excel_Copy_Paste_Contracts.xlsx' file.

Line	Parent Line	Image	Type	Product ID	Quantity	Coverage
10			Standard item	10000477	2	E
20			Standard item	ZSW_T1	1	E

Image	Product Category	Product ID	Description	Action

A	B	C	D	E
Copy/Paste Entitled Services & Parts				
	Boiler MCF-0003 - Parts	MCC-0018	Water Filter	
	Boiler MCF-0003 - Parts	MCC-0019	Function Cabinet	
	Commercial Heating Services	MCD-0472	Remote Consulting - Boiler Repair	

Business Description

- It is possible via Copy and Paste to upload MS Excel data to Entitled/ Excludes Services and/ or Parts Services and Parts
- 1:1 Column Structure needs to be considered

Key Business Benefits

- Acceleration of Contract set-up

Topic Area: Copy/Paste from Excel [Items, Covered Objects, Entitled/ Excluded Services & Parts]

The screenshot displays the SAP S/4HANA user interface. At the top, there is a breadcrumb trail: 'Contracts' > 'Contract 7778 - Paste/ Copy: Items, Multiple Co...'. Below this, a navigation bar contains 'Related Contracts', 'Opportunities', 'Maintenance Plan', 'Involved Parties', and 'Documents'. The main content area is titled 'Items (2)' and contains a table with columns 'Line', 'Parent Line', and 'Image'. The table has two rows: line 10 (checked) and line 20. Below the table, a status bar indicates '1 Selected'. The 'Entitled Services and Parts' tab is active, showing a table with columns 'Image' and 'Product Category'. A context menu is open over the 'Image' column of the 'Entitled Services and Parts' table, with the 'Paste' option highlighted in red. The context menu includes options: Undo (Ctrl+Z), Redo (Ctrl+Shift+Z), Cut (Ctrl+X), Copy (Ctrl+C), Paste (Ctrl+V), Paste as plain text (Ctrl+Shift+V), Select all (Ctrl+A), Spellcheck, Writing Direction, and Inspect (Ctrl+Shift+I).

Line	Parent Line	Image
<input checked="" type="checkbox"/>	10	
<input type="checkbox"/>	20	

Image	Product Category

Topic Area: Copy/Paste from Excel [Items, Covered Objects, Entitled/ Excluded Services & Parts]

7778 - Paste/ Copy: Items, Multiple Covered Objects, Entitled Services

Related Contracts Opportunities Maintenance Plan Involved Parties Document Flow Changes Workflow Changes Notes Attachments **Items** Pricing Transfer Logs Release < > ▾

Items (2)

Line	Parent Line	Image	Type	Product ID	Quantity	Coverage
<input checked="" type="checkbox"/> 10			Standard item	10000477	2 E	
<input type="checkbox"/> 20			Standard item	ZSW_T1	1 E	

1 Selected

General Data **Entitled Services and Parts** Excluded Services and Parts Pricing Usage Restriction Billing Plan Covered Objects

Entitled Services and Parts (3)

Image	Product Category	Product ID	Description	Action
	Boiler MCF-0003 - Parts	MCC-0018	Water Filter	🗑️
	Boiler MCF-0003 - Parts	MCC-0019	Function Cabinet	🗑️
	Commercial Heating Serv	MCD-0472	Remote Consulting - Boiler ...	🗑️

What's New in 1811 for Contracts

Subject to Change

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

Topic Area: Introduce Sales Office/ Sales Group – Quick Create

Contracts | Contract 7709 - Process Flow: Quote to Sales C... | **New Contract** | X

Type	Service Contract	Contract Template	
Status	In Preparation	ID	7807
External Reference		Name	
Signed On	dd.MM.yyyy	Begins On	dd.MM.yyyy
Ends On	dd.MM.yyyy	Service Level	
Customer		Contact	
Sales Unit		Sales Group	
Sales Office		Sales Organization	
Division		Distribution Channel	
Territory		Ship-To	

Business Description

- It is now possible to assign Sales Office and Sales Group to Contracts and design dependencies to the other Organization Units

Topic Area: Introduce Sales Office/ Sales Group - Overview

The screenshot displays the SAP Cloud for Customer interface. The top navigation bar includes 'Contracts', 'Sales Quotes', 'Sales Orders', 'Related Contracts', 'Opportunities', and 'Involved Parties'. The 'Overview' tab is selected and highlighted with a red box. The main content area shows 'Organizational Data' for a contract, with the following details:

- Sales Organization: Almica Germany
- Sales Unit: Almica Germany
- Distribution Channel: Direct sales
- Division: -
- Sales Office: Almica Germany (highlighted with a red box)
- Sales Group: Almica Germany (highlighted with a red box)
- Territory: Germany

The left sidebar contains navigation options: Home, Calendar, Feed, Accounts, Employees, Appointments, Products, Partners, Contracts (highlighted), Installed Base, Contacts, E-Mails, Product Administration, and Registered Products.

Topic Area: Introduce Sales Office/ Sales Group – Advanced Search

Contracts

Contract 7709 - Process Flow: Quote to Sales C...

All Contracts (5396) 🔍 ↕ 🔽

General Data 🔽

Covered Objects 🔽

Items 🔽

Entitled Services and Parts 🔽

Organizational Data 🔽

Sales Unit 🔽 ↔ Sales Organization 🔽 ↔ Distribution Channel 🔽 ↔ Division 🔽 ↔

Territory 🔽 ↔ Sales Office 🔽 ↔ Sales Group 🔽 ↔

External System 🔽

Restore Save Query Organize Queries

<input type="checkbox"/>	ID and Name	External ID	Status	Signed On	Begins On	Ends On	Service Level
<input type="checkbox"/>	7805 - Test Alexandra		In Preparation				
<input type="checkbox"/>	7706 - Process Flow Quote to Sales Contract		In Preparation		06.09.2018	07.09.2018	

Topic Area: Introduce Sales Office/ Sales Group - Reporting

Copy of Uwe's 1811 Test - Report opened by Administrator in Business Analytics work center.

View: Initial (modified)

Selection: Initial

You can customize the view by selecting from available chart options. Expand the left panel in order to further narrow down the criteria or select a present view or selection at top.

The screenshot shows the SAP Business Analytics report configuration interface. The main window displays a report titled "Copy of Uwe's 1811 Test" with a view of "Initial (modified)" and a selection of "Initial". The interface includes a top navigation bar with "Selection", "Available Fields", "Rows & Columns", and "Filters". Below this, there are options for "Report Default" and "View Default", and an "Add Fields" button. The "Add Fields" dialog box is open, showing a table of characteristics and key figures. The "Sales Group" and "Sales Office" rows are highlighted with a red box, and their "Display In Report" and "Display In Selection" checkboxes are checked. A mouse cursor is pointing at the "Display In Selection" checkbox for "Sales Office".

Characteristic	Display In Report	Display In Selection	Display as Hierarchy
> ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
> Include Account Hierarchy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
> Include Authorized Parties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
> Is Template	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
> Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
> Owner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
> Pricing Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
> Pricing On	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
> Pricing Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
> Reason for Rejection	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
> Sales Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
> Sales Office	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
> Sales Organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
> Sales Territory ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
> Sales Unit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

What's New in 1811 for Contracts

Subject to Change

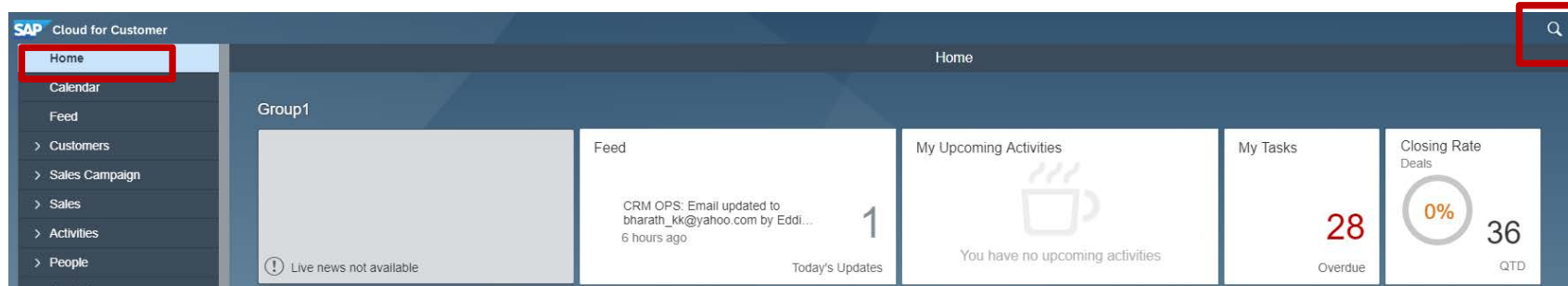
Key Innovations

- 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

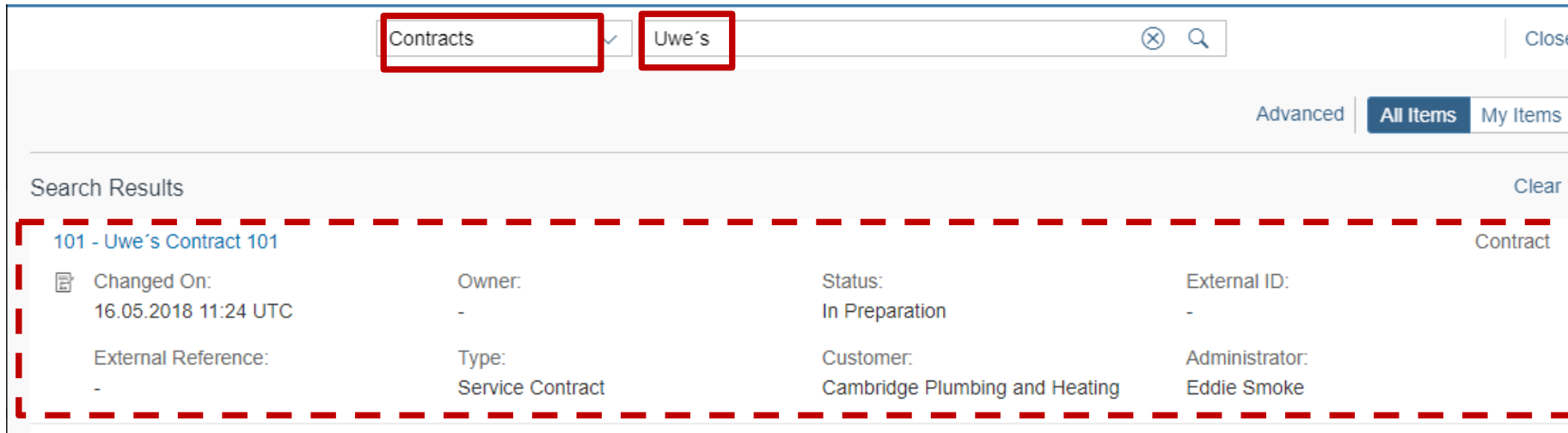
- Introduce Sales Office/ Sales Group
- **Consider Contracts in Enterprise Search**
- Data Source Enhancements (Billing Plan Parameter, Owner)
- Performance Improvements “Entitled Services & Parts”
- Editability of Covered Object and “Entitled Services & Parts”
- Allow change of Type as Mass Correction 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

Topic Area: Consider Contracts in Enterprise Search [Simple Search]



Business Description

- It's possible to search for contracts via Enterprise Search by simple and advanced search



Topic Area: Consider Contracts in Enterprise Search [Advanced Search]

Contracts Close

Simple **All Items** My Items

Changed On:

Owner:

Description:

ID:

Status:

External ID:

External Reference:

Type:

Customer:

Administrator:

Customer ID:

AO EXT_Test1:

Search Results Clear

7756 - AO CTR to ticket 2	Contract		
Changed On: 14.09.2018 13:31 UTC	Owner: John Kim	Status: Active	External ID: -
External Reference: -	Type: Service Contract	Customer: Luxury Heating & Cooling Co	Administrator: Attila Orban
7753 - AO CTR to Ticket 1	Contract		
Changed On: 11.09.2018 09:17 UTC	Owner: John Kim	Status: Active	External ID: -
External Reference: -	Type: Service Contract	Customer: Luxury Heating & Cooling Co	Administrator: Attila Orban
7488	Contract		
Changed On: 03.08.2018 10:51 UTC	Owner: John Kim	Status: Active	External ID: -
External Reference: -	Type: Service Contract	Customer: Luxury Heating & Cooling Co	Administrator: CRM OPS
7487	Contract		
Changed On: 03.08.2018 10:38 UTC	Owner: John Kim	Status: Active	External ID: -
External Reference:	Type:	Customer:	Administrator:

What's New in 1811 for Contracts

Subject to Change

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

Topic Area: Data Source Enhancements (Billing Plan Parameter, Owner)

Billing Plan Report - Report opened by Administrator in Business Analytics work center.

View : Initial (modified)

Selection : Initial

You can customize the view by selecting from available chart options. Expand the left panel in order to further narrow down the criteria or select a present view or selection at top.

Selection Available Fields Rows & Columns Filters

Report Default

Row Fields Disable Refresh

- Account
- Currency for Billing Plan Value
- Billing Plan Start Date
- Billing Plan End Date
- Billing Plan Horizon
- Billing Interval

Account	C...	Billing Plan Start ...	Billing Pla...	Billing Plan Horizon	Billing Int...	Net Value	Overall Net ...	Total	
Superquinn	1001...	Euro	30.04.2018	27.04.2020	Not assigned	Monthly	1.605,00 ...	38.520,00 EUR	1.605,00 EUR
			12.04.2028	Not assigned	Monthly	3.069,00 ...	368.280,00 EUR	3.069,00 EUR	
			17.04.2028	Not assigned	Monthly	3.069,00 ...	368.280,00 EUR	3.069,00 EUR	
			18.04.2028	Horizon 1 Year	Monthly	4.059,00 ...	52.767,00 EUR	4.059,00 EUR	
				Not assigned	Monthly	18.315,00...	2.197.800,00 E...	18.315,00 EUR	
			30.05.2018	30.03.2028	Not assigned	Monthly	3.168,00 ...	14.454,00 EUR	3.168,00 EUR
			27.06.2018	22.06.2028	Horizon 1 Year	Monthly	19.602,00...	254.826,00 EUR	19.602,00 EUR
			30.06.2018	08.06.2028	Not assigned	Monthly	22.374,00...	2.684.880,00 E...	22.374,00 EUR
				21.06.2028	Not assigned	Monthly	15.246,00...	423.027,00 EUR	15.246,00 EUR
				28.06.2028	Not assigned	Monthly	7.326,00 ...	18.909,00 EUR	7.326,00 EUR
				29.06.2028	Today's date + 1 year	Monthly	8.118,00 ...	44.946,00 EUR	8.118,00 EUR
					Not assigned	Monthly	14.256,00...	86.724,00 EUR	14.256,00 EUR
				30.06.2028	Today's date + 1 year	Monthly	6.138,00 ...	54.846,00 EUR	6.138,00 EUR
			31.07.2018	16.07.2028	Not assigned	Monthly	2.178,00 ...	13.959,00 EUR	2.178,00 EUR

Business Description

- All Billing Plan Plan related Parameters from Contract form part of Contracts Reporting on Header and Item Level
- Same applies for Incoterms and Incoterm Location on Header and Item Level
- Owner, Sales Group and Sales Office are considered for Reporting on Contract Header Data

Key Business Benefits

- See Example for Billing Plan Report on Contract Header Level with Net Value, Overall Net Value [~Billing Plan Value] and Total und analyze Contract Contribution of selected customers

Topic Area: Data Source Enhancements (Billing Plan Parameter, Owner)



Set-up Details

- Go to Business Analytics Design Data Sources
- See Characteristics on Contract Header MDAV

Customers Feed Business Configuration **Business Analytics** Service Entitlements People Sales Campaign Sales Activities Analysis Competitor

Design Reports **Design Data Sources** Design Key Figures Design KPI Broadcasts

Design Data Sources: All (303)

[Preview](#) [Export](#) [Edit](#) [New](#) [Delete](#) [Expose](#) [Build OData Queries](#) [View Logs](#)

All

Data Source Name	Description	Created By	Change...	...	Docum...
Campaign Details	Campaign Details	MAHAPATRASH	24.09.2014	<input type="checkbox"/>	<input type="button" value="Search"/>
Campaign Inbound Outbound		BRANDLK	29.07.2014	<input type="checkbox"/>	<input type="button" value="Search"/>
Campaign Response Count	Indicates the number of reponses to th...	SAP	24.04.2013	<input type="checkbox"/>	<input type="button" value="Search"/>
Campaign Response Details	This report lists all the response option...	ABBI	17.03.2016	<input type="checkbox"/>	<input type="button" value="Search"/>
Code List Mapping	Code List Mapping	YANG	19.10.2017	<input type="checkbox"/>	<input type="button" value="Search"/>
Company Master Data	Provides company master data, includi...	SAP	21.10.2016	<input type="checkbox"/>	<input type="button" value="Search"/>
Contact Master Data	Provides contact master data, includin...	SAP	01.12.2016	<input type="checkbox"/>	<input type="button" value="Search"/>
Contact Master Data (deprecated)	Provides contact master data, includin...	SAP	11.05.2016	<input type="checkbox"/>	<input type="button" value="Search"/>
Contact Merge Master Link		KAHL M	03.08.2018	<input type="checkbox"/>	<input type="button" value="Search"/>
Contract	Contains all contracts. It allows you to ...	ENDERLE	18.07.2018	<input type="checkbox"/>	<input type="button" value="Search"/>

Details: Contract

General Extension Fields Referenced Data Sources

Changed By: ENDERLE

Created By: ENDERLE

Solution:

Changed On: 18.07.2018 08:30

Created On: 23.10.2015 08:49

Access Context: 2020 Employee, Account, Sales Data

Topic Area: Data Source Enhancements (Billing Plan Parameter, Owner)

Data Source: Contract

Object Information

Data Source Name	Contract
Data Source ID	CRM_CONTRACT_HB
Description	Contains all contracts. It allows you to analyze the contracts, their usage, and all relevant informations.
Type	Basic Data Source
Origin	SAP
Obsolete	no
Integration Information	Integration Information

Access Control

Access Context Name	Access Context ID
Employee, Account, Sales Data	2020

Overview of Fields

Characteristics

Characteristic Name	Characteristic ID	Characteristic Type	Data Type	Origin - Business Object	Origin - Node	Origin - Element	Global Data Type
Advance Billing	INV_SCHED_INV_IN_ADVANCE_IND	Indicator	CHAR(1)	Contract	Root	InvoiceScheduleInvoicingInAdvanceIndicator	Indicator
Billing Interval	INV_SCHED_NEXTI_DATE_CALC_CODE	Code	CHAR(2)	Contract	Root	InvoiceScheduleNextInvoiceDateCalculationFunctionCode	ContractInvoiceDateCalculationFunctionCode [Download Codelist]
Billing Plan End Date	INV_SCHED_END_DATE	Date	DATS(8)	Contract	Root	InvoiceScheduleEndDate	Date
Billing Plan Horizon	INV_SCHED_HORIZ_DATE_CALC_CODE	Code	CHAR(2)	Contract	Root	InvoiceScheduleHorizonDateCalculationFunctionCode	ContractHorizonDateCalculationFunctionCode [Download Codelist]
Billing Plan Start Date	INV_SCHED_START_DATE	Date	DATS(8)	Contract	Root	InvoiceScheduleStartDate	Date
Currency for Billing Plan Value	INVOICE_SCHED_NET_AMOUNT_CUR	Code	CHAR(3)	Contract	TotalValues	InvoiceScheduleNetAmount/currencyCode	CurrencyCode [Download Codelist]



Set-up Details

- Characteristics on Contract Header MDAV
- Billing

Topic Area: Data Source Enhancements (Billing Plan Parameter, Owner)

Data Source: Contract

Object Information

Data Source Name	Contract
Data Source ID	CRM_CONTRACT_HB
Description	Contains all contracts. It allows you to analyze the contracts, their usage, and all relevant informations.
Type	Basic Data Source
Origin	SAP
Obsolete	no
Integration Information	Integration Information

Access Control

Access Context Name	Access Context ID
Employee, Account, Sales Data	2020

Overview of Fields

Characteristics

Characteristic Name	Characteristic ID	Characteristic Type	Data Type	Origin - Business Object	Origin - Node	Origin - Element	Global Data Type
Sales Group	SALES_GROUP_UUID	Identifier	RAW(16)	Contract	SalesAndServiceBusinessArea	SalesGroupUUID/content	UUID
Sales Office	SALES_OFFICE_UUID	Identifier	RAW(16)	Contract	SalesAndServiceBusinessArea	SalesOfficeUUID/content	UUID
Owner	EMPLOYEE_RESPONSIBLE_UUID	Identifier	RAW(16)	Contract	Party	PartyUUID/content	UUID
Incoterms	INCO_CLASSIF_CODE	Code	CHAR(3)	Contract	DeliveryTerms	IncotermsClassificationCode	IncotermsClassificationCode [Download Codelist]
Incoterms Location	INCO_LOC_NAME	Name	CHAR(28)	Contract	DeliveryTerms	Incoterms/TransferLocationName	IncotermsTransferLocationName



Set-up Details

- See Characteristics on Contract Header MDAV
- Sales Group, Sales Office, Owner, Incoterms and Incoterms Location

What's New in 1811 for Contracts

Subject to Change

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

Topic Area: Editability of Covered Object and Entitled Services & Parts

The screenshot displays the SAP S/4HANA Contracts interface for contract MC6171Q9A - EI Diablo Heating. The 'Entitled Services and Parts' tab is highlighted with a red dashed box. Below it, a table lists 6 entitled services and parts. A red solid box highlights the 'Product ID' column in this table. A 'Products' dialog box is open, showing a list of products with 'MCC-0022' selected. The dialog box also shows a search bar and a 'Cancel' button.

Line	Type	Determination Rel	Status	Product ID	Description	Coverage	Quantity	Release Control	Target Qty
10	MC-Text-Item	None	In Prep...		Break Fix Box				
20	MC-Entitlements-Item	Limited to	In Prep...	MCE-008	4-Years-Platinur	75% by C	1	Each	
30	MC-Ent-Products-Iter	Limited to	In Prep...	MCC-001S	Function Cabine	100% by I			10

Image	Product Category	Product ID	Description
	Commercial Heating Se		
	Commercial Heating Spare	MCC-0022	Small Parts Hot W
	Commercial Heating Spare	MCC-0025	Burner Small Part
	Commercial Heating Spare	MCC-0027	S27 Battery
	Commercial Heating Service	MCD-0471	Remote Diagnosti

ID	Name
MCC-0020	Regulation Valve
MCC-0022	Small Parts Hot Water Cylir
MCC-0022	Burner Small Parts
MCC-0027	S27 Battery

Business Description of Feature Here

- It's possible to edit and search within the table of Entitled Services and Parts

Key Business Benefits

- Accelerated Set-up and Maintenance of Contracts

Topic Area: Editability of Covered Object and Excluded Services & Parts

The screenshot displays the SAP interface for managing excluded services and parts. The 'Excluded Services and Parts' tab is highlighted with a red dashed box. Below it, the 'Excluded Services and Parts (1)' section shows a table with columns for Image, Product Category, and Product ID. The 'Product ID' field is highlighted with a red box and contains the value 'Boiler Rust Removal'. A 'Products' dialog box is open, showing a list of products with columns for ID and Name. The list includes:

ID	Name
MCD-0476	On-site Consulting - Boiler installs
MCD-0492	On-Site Maintenance - Gas Boilers
MCD-0499	Vent Pressure
MCD-0500	Boiler Rust Removal
MCD-0500	

The 'Products' dialog box also shows a search bar, a filter icon, and a 'Cancel' button.

Business Description of Feature Here

- It's possible to edit and search within the table of Excluded Services and Parts

Key Business Benefits

- Accelerated Set-up and Maintenance of Contracts

Topic Area: Editability of Covered Object and Entitled Services & Parts

The screenshot displays the SAP S/4HANA interface for a contract titled 'MC29_SIPR - Registered Product at Long Island Heating - Silver'. The 'Covered Objects' table is visible, with one object selected. The 'Product ID' field in the table is highlighted with a red box. A 'Products' pop-up window is open, showing a list of products with columns for ID and Name. The 'Products' window also has a red box around it. The 'Covered Objects' table has a red dashed box around the 'Image' column header.

Image	Product Category ID	Product Category	Product ID
	50-10	WP Microwave	MCF-0003

ID	Name
MCF-0001	AHT COMBI 75
MCF-0003	AHT Combi 190
MCF-0036-IV-01	AHT Radiator

Business Description of Feature Here

- It's possible to edit and search within the table of Covered Objects

Key Business Benefits

- Accelerated Set-up and Maintenance of Contracts

What's New in 1811 for Contracts

Subject to Change

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

What's New in 1811 for Contracts

Subject to Change

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

Topic Area: Further Code List Restrictions

The screenshot shows the SAP Administrator interface. The top navigation bar includes 'Data Workbench', 'OData', 'Administrator', 'Service', 'Contracts', 'Installed Base', 'Resource Scheduler', and 'Time Recording'. Below this, a secondary navigation bar contains 'General Settings', 'Users', 'Service And Social', 'Sales And Campaign Settings', 'Business Flexibility', and 'Input And Output Manage'. The 'Business Flexibility' menu is highlighted with a red box. The main content area is divided into two columns. The left column lists categories: 'Integration' (Communication Systems, Arrangements, Scenarios, etc.), 'Work Distribution' (Organizational, Employee), 'Dashboards' (Interactive), 'Code List Restrictions' (highlighted with a red box), and 'Usage and Response Time Statistics'. The right column lists sub-categories: 'Intermediate Staging Area for Data Replication' (Employee Master Data, Organizational Structure, Business Role), 'Mobile Settings' (Mobile Settings, Manage Refresh Tokens), 'Data Management' (Deleted Data), 'Real-Time Communication' (Settings, End User Agreement), and 'Data Archiving' (Store Data, Archiving Rule, Search Archived Data).

Business Description of Feature Here

- Via Code List Restriction it is possible to restrict/filter values being offered in Contract fields



Set-up Details

- Go to: Business Flexibility -> Code List Restrictions

Topic Area: Further Code List Restrictions

SAP Cloud for Customer

Volker Kampen | Personalize | Adapt | Go to SAP Store | Download | Help

Code List Restrictions: All (36)

Business Object	Code To Restrict	Control Field
Ticket	Priority	
Account	ABC Classification	Contact Permission
Opportunity	Document Type	

New Code List Restriction

Area the restriction applies to

* Business Object: Contract

* Code to Restrict: Incoterms Version

Control Field

Control Field Type: Business Field Extension Field

Business Field: [Empty]

Business Role: [Empty]

Save Cancel

Business Field

Name	Business Context	UI Text
CONTRACT_LC_STATUS_CODE	Contract	Status
CONTRACT_APPROVAL_STATUS_CODE	Contract	Approval Status
CONTRACT_MAIN_BPVT	Contract	Contract Option
CONTRACT_PROCESSING_TYPE	Contract	Type
CONTRACT_DIVISION_CODE	Contract	Division
CONTRACT_DISTRIBUTIO_CHANNEL_C	Contract	Distribution Channel
CONTRACT_REPLICATI_STATUS_CODE	Contract	Transfer Status
CONTRACT_INCOTERMS	Contract	Incoterms
CONTRACT_PAYMENT_TERMS	Contract	Payment Terms

Cancel



Set-up Details

- Value Enhancement Of 'Code to Restrict Values' in Standard
- Enhancement of 'Business Field' in Standard

Code to Restrict NEW:

Division
 Distribution Channel
 Payment Terms
 Incoterms
 Currency
 Item Type
 Party Role
 Coverage
 Reason for Rejection
 Type

Business Field for Restriction NEW:

Transfer Status
 Division
 Distribution Channel
 Incoterms
 Payment Terms

What's New in 1811 for Contracts

Subject to Change

Key Innovations

- Sales Contract as Follow-Up to Quote
- Incoterms
- Form Template Selection
- Extension Flow:
 - Sales Arrangement to Contract
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 - 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

Topic Area: Enhance Live Activity by Contracts

The screenshot displays the SAP S/4HANA RUI interface for a contract. The top navigation bar includes tabs for Overview, Covered Objects, Tickets, Related Contracts, Opportunities, Maintenance Plan, Involved Parties, Document Flow, Changes, Notes, and Attachments. The 'Involved Parties' tab is active, showing a table of 7 parties. A red dashed box highlights the '7235 - 1808-2 Contract' title. Another red dashed box highlights the 'Involved Parties' tab. A third red dashed box highlights a phone number '+49 68949811808' in the table. A fourth red dashed box highlights a phone number '+49 68949811808' in a pop-up card for 'Space Balls'. The pop-up card also shows a 'Close' button. The background details panel shows contract information such as Type (Service Contract), Consistency Status (Consistent), ID (7235), and Name (1808-2 Contract).

Name	Address	Address	E-Mail	Mobile	Phone
Space Balls	US	US			+49 68949811808
Lord Offline	US	US	bernhard.may@sap.com		
Space Balls	US	US			+49 68949811808
Lord Helmchen	US	US			+49 68949811808
Lord Helmchen	US	US			+49 68949811808
Space Balls	US	US			+49 68949811808
Sublimation Inc	GB	GB			

Business Description

- In RUI you can start [Phone Call] Live Activities within a Contract

Topic Area: Enhance Live Activity by Contracts [Search]

The screenshot displays the SAP Live Activity Center interface. At the top, there are tabs for 'Contracts', 'Contract 7235 - 1808-2 Contract', and 'Live Activity Center'. Below the tabs, a message states 'Your entries have been saved.' A search bar is visible with the text 'Default Search from Outgoing Call Parameters'. A dropdown menu is open, showing a list of categories: 'All Categories', 'Accounts', 'Contracts', 'Individuals', 'Registered Products', and 'Tickets'. The 'Contracts' option is selected and highlighted. The main area shows call information for a 'Ready' status call. The 'Call Information' panel on the right includes fields for 'Call From', 'Call To', 'Number Dialed', and 'Linked Ticket ID'. A 'Notes' section is also present, with a red box highlighting the text 'This Note should appear as phone call acti'. A circled number '1' is placed above the notes section.

Category	Status	External ID	City	State
Contracts	Ready	-	-	-
Copper Tubes	Active	-	-	-

Business Description

- In the Live Activity it is possible to search for contracts
- Moreover Notes can be entered in the upcoming Call Information screen which will be stored within Phone Call [Facet 'Activities'] of the current contract

Topic Area: Enhance Live Activity by Contracts [Notes]

Contracts | Contract 7235 - 1808-2 Contract | Live Activity Center

7235 - 1808-2 Contract

Finance Plan | Involved Parties | Document Flow | Changes | Notes | Attachments | Approval | Items | Pricing | Transfer Logs | Release History | Activities

All Appointments (0)

Subject	Status	Start Date/Time	End Date/Time	Account	Primary Contact
No data					

All Tasks (1)

Subject	Due Date/Time	Date Completed	Account
dasdsadsdf	16.08.2018 07:30		

All Phone Calls (1)

Subject	Owner	Account	Primary Contact
Call To: 49 68949811808	Lord Helmchen	Space Balls	Bobby Brown
Call To: 49 68949811808	Lord Helmchen	Space Balls	Bobby Brown
Call To: 49 68949811808	Lord Helmchen	Space Balls	Bobby Brown
Call To: 49 68949811808	Eddie Smoke	Space Balls	Bobby Brown
Call To: 49 68949811808	Eddie Smoke	Space Balls	Bobby Brown

E-Mails (0)

Subject	Category	Priority	Account	Primary Contact
---------	----------	----------	---------	-----------------

Phone Call Details: Call To: 49 68949811808

Status: Open

Start Date/Time: 19.09.2018 14:24

Account: Space Balls

Primary Contact: Bobby Brown

Phone: **2**

Notes: This Note should appear as phone call activity in the current contract 7235 - **Call To: 49 68949811808** Contract!

What's New in 1811 for Contracts

Subject to Change

Key Innovations

- Sales Contract as Follow-Up to Quote
- Incoterms
- Form Template Selection
- Extension Flow:
 - Sales Arrangement to Contract
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 - 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

Topic Area: Cross Topic/ Adoption - Business Partner Merge Process Enhancement

The screenshot illustrates the SAP Customer Merge process. A 'New Customer Merge' dialog box is open, showing the name 'VK-Coffee Inc.' and options for 'Individual Customer', 'Account', and 'Contact'. A red box highlights the 'New' button (1) and the 'First Customer' selection area (2). Below the dialog, an 'Accounts' list shows three entries for 'VK-Coffee Inc.', 'VK-Koffee Inc.', and 'VK-Coffee Incorporated', with the first two highlighted in red and labeled as 'Duplicates' (3). A background table shows a list of merge records with columns for status, date, time, and user.

Merge ID	Name	Surviving Record
1	GerdTUITest	
2	GerdTUITest	
11	RH - Hilfreich	Hilfreich
12	TK_01	T K Survivor
13	TK_02	T K Survivor
14	TK_03	T K Survivor

Account ID	Account Name
1058223	lastNameTest vkmnk
1072467	VK-Coffee Inc.
1072468	VK-Koffee Inc.
1072469	VK-Coffee Incorporated

Merge Completed - Realignmen...	05.07.2018 10:28	TKONSTANDIN	05.07.2018 10:34	TKON!
Completed	05.07.2018 10:35	TKONSTANDIN	05.07.2018 10:39	TKON!
Merge Completed - Realignmen...	05.07.2018 12:09	TKONSTANDIN	05.07.2018 12:14	TKON!
Merge Completed - Realignmen...	05.07.2018 12:22	TKONSTANDIN	05.07.2018 12:29	TKON!
Merge Completed - Realignmen...	05.07.2018 13:55	TKONSTANDIN	05.07.2018 14:06	TKON!
Merge Completed - Realignmen...	02.08.2018 12:17	RISCHAR	02.08.2018 12:22	RISCH
Completed	03.08.2018 16:13	UHEROLD	03.08.2018 16:25	UHER!
Completed	03.08.2018 16:24	MEISWINKEL_1	03.08.2018 16:31	MEISV
Completed	07.08.2018 12:48	UHEROLD	07.08.2018 12:56	UHER!
Completed	13.08.2018 19:55	DAVE	13.08.2018 20:02	DAVE

Business Description

- Merge different master data of multiple Business Partner in case of duplicates to one
- Merge also Business Partner in the already existing transactions, where the duplicates were used.
- Includes also ECC Master Data update

Key Business Benefits

- Easy way to fix issues [in case of duplicate in the Business Partner Master data [e.g. multiple contracts due to typo in Account name]

Topic Area: Cross Topic/ Adoption - Business Partner Merge Process Enhancement



Set-up Details

- Nominate *one* Business Partner [no Prospect!] as 'Master'
- Define the properties of the other duplicate Business Partners that should be used by the 'Master'
- Initiate Merge

Customer Merge

48

ID: 48

Name: VK-Coffee Inc. Merge

Surviving record:

Status: Not Started

Created On: 07.09.2018 14:13 GMTUK

Created By: KAMPENV

Changed On: 07.09.2018 14:13 GMTUK

Changed By: KAMPENV

Attribute Selection Overview Transactions Result Log

Reset

Element	Business Partner 1	Business Partner 2	Business Partner 3
Master	<input checked="" type="checkbox"/> 1072467 - Customer 4	<input type="checkbox"/> 1072468 - Prospect	<input type="checkbox"/> 1072469 - Customer
Sales Territory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Name	<input checked="" type="checkbox"/> VK-Coffee Inc.	<input type="checkbox"/> VK-Koffee Inc.	<input type="checkbox"/> VK-Coffee Incorporated
Address	<input checked="" type="checkbox"/> VK-Coffee Inc. / Heidelberg / DE	<input type="checkbox"/> VK-Koffee Inc. / Heidelberg / DE	<input type="checkbox"/> VK-Coffee Incorporated / Heidelberg / DE
Language	<input type="checkbox"/> English	<input type="checkbox"/> English	<input checked="" type="checkbox"/> German 5

6

Save Initiate Merge

Topic Area: Cross Topic/ Adoption - Business Partner Merge Process Enhancement

Contracts

Contract 7724 - VK-Coffee Incorporated Contract

7724 - VK-Coffee Incorporated Contract

Price Plan Involved Parties Document Flow **Changes** Workflow Changes Notes Attachments Items Pricing Transfer Logs Ri < > v

Changes Made From dd.MM.yyyy

Changes Made To dd.MM.yyyy

Attribute

Go Reset

Changed By User

(2)

Change Date/Time	Changed By	User ID
07.09.2018 14:22	Volker Kampen (JYU9R2PS...	KAMPENV
07.09.2018 13:36	Volker Kampen (JYU9R2PS...	KAMPENV

1 Selected

Details: 07.09.2018 14:22 (3)

Attribute	Value Changed From	Value Changed To	Modification...
Party Address - Name	VK-Coffee Incorporated	VK-Coffee Inc.	Update
Party Address - City	Highdelberg	Heidelberg	Update
Party ID	1072469	1072467	Update



Set-up Details

- Business Partner merge is documented in Changes

Topic Area: Cross Topic/ Adoption - Business Partner Merge Process Enhancement

SAP Cloud for Customer interface showing the 'Relationships' tab for 'VK-Coffee Incorporated'. The table displays one relationship where the account is replaced by 'VK-Coffee Inc.' with the address 'Heidelberg / DE'. The table is highlighted with a red dashed border.

Relationship Type	Business Partner	Sales Organization	Distribution ...	Division	Address
Is Replaced By	VK-Coffee Inc.				Heidelberg / DE



Set-up Details

- Business Partner merge is documented in Facet 'Relationships' of the replaced [Duplicate] Accounts

What's New in 1811 for Contracts

Subject to Change

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**

Topic Area: Enable My Account Team in Business Partner value help

Name	Party Role	Phone
Dr. Uwe Enderle	Contract Administrator	
Herbert Jones	Sales Employee	

Business Description

- Its possible to 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 contract.

Name	Last Name	Middle Name	Job
Herbert Jones	Jones		
Dr. Uwe Enderle	Enderle		Service

What's New in **Utilities**



What's New in 1811 for Utilities

Key Innovations

- Advanced Metering Infrastructure (Phase 2)
 - AMI Views/Functionalities in the Move Processes
 - Ping AMI Meter
- Alerts Framework (Phase 1)
 - Support Viewing of the Alerts on the Side
- Collections (Phase 1)
 - View Dunning Information
 - View Credit Rating Score
 - View Security Deposit Total
- Payment Method (Phase 1)
- One Time Payment

Additional Enhancements

- Alternate View for Object Hierarchy
- Enhance Security Deposit for the Move In Process
- Enhance Contract Account Search
- Contract Account and Premise Information Live Activity

Utilities: Advance Infrastructure Metering (AMI) in Move Processes *Phase 2*

Meter ID	Installati...	Device Category Descript...	AMI Meter	AMI Status	Remote Connect	Remote Disconn...	Remote Meter Read...	Manual Meter R...	On-Deman...	Request Oper...	Receive Text
12	16716	AMI device category	Yes	Active	✓	✓	✓		✓	✓	✓
600000000000120039	17233	Single-rate meter NON AMI	No	Inactive							

Meter Information in the move processes

- Available in the move in, move out, and transfer processes
- Ability to view meter information like device category, register group, AMI status and capabilities

Key Business Benefits

- Ability for the agents to view meter information for AMI and non-AMI meters right in the move processes
- If it is an AMI meter, then the AMI related capabilities will be appear dynamically

Utilities: Advance Infrastructure Metering (AMI) - Ping Smart Meter *Phase 2*

Ping AMI Meter

- In the Premise Object > Connection Details, the user now can ping the meter
- The ping response will provide the last ping's date and time as well as the voltage



The screenshot shows the SAP interface for a premise object. The top navigation bar includes "Overview", "Connection Details", "Tickets", "Service Notifications", "Service Orders", "Sales POD", and "Utilities Exceptions". The "Connection Details" tab is active. Below the navigation bar is the "Object Hierarchy (2)" section, which contains a table with columns "Name", "ID", and "Description". The table has three rows: "Installation / Point Of Delivery" (ID: 16716), "Device" (ID: 12), and "Installation / Point Of Delivery" (ID: 17233). The "Device" row is highlighted with a red border. To the right of the table, there is a "Ping" button, also highlighted with a red box. Other buttons include "Expand All", "Collapse All", and "Refresh". At the bottom left, there is a "1 Selected" indicator.

Name	ID	Description
Installation / Point Of Delivery	16716	Electricity / Rate category E1 - Electricity rate category 1
Device	12	AMI device category - Active
Installation / Point Of Delivery	17233	Electricity / Rate category STAMM_STR1 - Tariff

Key Business Benefits

- Ability to receive the status AMI meter from the call center with the voltage information for analysis

Utilities: Alerts Framework *Phase 1*

Alerts Framework

- The side panel is available for the alerts framework in the customer, premise, and contract account objects
- The framework provides a container to display logic specified by the Utility Company
- Configuration to set up the profile for the objects

Key Business Benefits

- Ability to see the alerts through out all the tabs of the object
- Flexibility with the container concept for the project to define what to display
- Ease of setting up configuration to determine while profile to use for the objects

The screenshot displays the SAP Cloud for Customer interface for a customer named Charles Maxwell. The main content area shows financial data like 'Customer Must Pay Amount' (4,036.45 EUR) and 'Customer Total Balance' (5,218.12 EUR). A 'Recent Interactions' table lists manual inquiries. A side panel on the right, titled 'Alerts(4)', shows a configuration for a 'Cash Only' alert, including a description and a 'Due date is overdue' message. A red box highlights this side panel and an arrow points from it to a table in the bottom section of the interface.

Change View "C4C Utilities Alerts Rule Maintenance": Overview

C4C Launch Object	C4C Launch Object Description	BRFplus Application Name
CONTRACT_ACCOUNT	Contract Account TI	ZCOD_ALERTS_FRAMEWORK
CUSTOMER	Customer/Account TI	ZCOD_ALERTS_FRAMEWORK
PREMISE	Premise TI	ZCOD_ALERTS_FRAMEWORK

Utilities: Collections *Phase 1*

The screenshot shows the SAP Cloud for Customer interface for a customer named Mark English. The page is titled 'Utilities Collections' and displays the following information:

- Customer Summary:**
 - Customer Total Balance: 375.11 EUR
 - Customer Must Pay Amount: 175.11 EUR
 - Credit Worthiness: 9
 - Security Deposit: 400.00 EUR
- Filter Contract Account:**
 - Contract Account ID: 1515409
 - Name: Mark
 - Total Balance: 168.11 EUR
 - Must Pay Amount: 175.11 EUR
- Dunning History (2):**

Contract Acc...	Date Of Issue	Balance	Print Date	Collection S...	Collection Ste...	Dunning Procedure	Dunning Level...	Dunning Text	Next Dunning Date	Dunning Charge	Payment Target	Stat
1515409	09/04/2018	168.11 EUR				Dunning Procedure...	03	Block Active				●
1515409	08/01/2018	168.11 EUR	09/18/2018			Dunning Procedure...	02	Hard Letter		7		□

Collections *Phase 1*

- New tab for the Customer object to display collections related information
- Customer header information includes the total balance, customer must pay amount, credit worthiness, and security deposit
- Defaults to the latest/highest number of contract account for the customer with the ability to select a different contract account as desired
- Table on the bottom display dunning history

Key Business Benefits

- Ability to view information related to Collections which will help the call center agent analyze customer's dunning activity as well as view creditworthiness and total security deposited amount

Utilities: Payment Method *Phase 1*

The screenshot displays the SAP Cloud for Customer interface. The main view shows a 'Bank Data' table with 2 records. The table columns are: Bank ID, Bank Name, Bank Key, Bank Account (Last four digits), Country, Account Holder, Valid From, Valid To, Change Reason, and SV. The first record is for Citi Bank with Bank ID 0001 and Bank Key 123123123. The second record is for Citi Bank New York with Bank ID 0002 and Bank Key 134329042. An 'Edit Bank Details' dialog box is open, showing a form for editing bank information. The dialog includes a message: 'For security reasons, the old bank account number and IBAN cannot be displayed.' The form fields are: Reason for Change (dropdown), Country (US - United States), Bank Key (123123123), New Bank Account Number, Bank Name (Citi Bank), Account Holder, SWIFT Code, and New IBAN. The dialog has 'Save' and 'Cancel' buttons at the bottom.

Bank ID	Bank Name	Bank Key	Bank Account (Last four digits)	Country	Account Holder	Valid From	Valid To	Change Reason	SV
0001	Citi Bank	123123123	4567	United Sta...		06.07.20...	Unlimited		
0002	Citi Bank New York	134329042	1113	United Sta...		06.07.20...	Unlimited		

Payment Method *Phase 1*

- New tab for the Customer Object to manage bank information
- Ability to view and update bank information
- Ability to capture reason for change

Key Business Benefits

- Simple view to manage bank information
- For security reasons, only the last 4 digits are displayed. The account numbers will not be displayed in the edit, but the user can update with a new number if desired

Utilities: One Time Payment

The screenshot displays the SAP Utilities 'One Time Payment' interface. The background shows a customer search for 'Charles Maxwell' with a 'Filter Contract Account' table. A red box highlights the 'One Time Payment' button. The modal window contains the following fields:

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

Bank Information	
Bank Details	Citi Bank New York/US/1113
Country	US - United States
Bank Name	Bank of America
Bank Account	123456789
IBAN	

Payment Information	
Pay Amount	1,000.00 EUR
Payment Date	24.09.2018

One Time Payment

- Default the same contract account selected in Utilities Financials with the ability to select a different one for the customer
- Ability to take a one time payment with existing or new bank information
- New bank information will be saved automatically
- User to select the open payable amount or another preferred amount
- Payment date can be changed to a future date, but cannot be backdated

Key Business Benefits

- Simple single screen to capture new bank information and take new payments
- Bank information to populate automatically if the data is already available in the contract account
- While on the screen, the user is prompted the open payable amount
- Validation is provided to ensure that the user cannot backdate the payment date

Utilities: Security Deposit Enhancement in Move In Process

The screenshot shows the 'Move In' process in SAP Cloud for Customer. The breadcrumb trail is: Customer & Premise (1) -> Services (2) -> Contract Account and Billing (3) -> Review (4). The current step is 'Contract Account and Billing'.

Customer ID: 86735
 External Premise ID: 39983
 Address: 100 Maxwell Street / Palo Alto 94034 / US

Contract Account External ID: 1097750

Contract Information (1)

Division	Installation	Joint Invoicing	Deposit Reason	Amount	Waiver Reason
Electricity	15563	Contract can be invoiced jointly with other contracts	Payment history	100.00 EUR - Euro	

Total Deposit Amount: 100.00 EUR

Contract Information in Move In

- New option of using contract information table now available in the move in process
- Simple scoping question to turn on the new contract information table
- Project will decide to use the previous billing information or the new contraction information table which contains the same topics of Joint Invoicing and Security Deposit. The main difference between the two options is billing information is at the Contract Account level while the Contract Information is at the Contracts level

Key Business Benefits

- Projects have more options to manage joint invoicing and security deposits (at the contract level)
- Solution will calculate a total amount to be collected at submit of the move in which is helpful if there are multiple amounts to be collected

Questions for Utilities Call Center and Service

Set as Reviewed Set as Not Reviewed

Business Option	Review Status	In Scope
Utilities Security Deposit (1)		
Do you want to enable Security Deposit at contract level?	Reviewed	<input checked="" type="checkbox"/>

Utilities: Alternate View for Object Hierarchy in Utilities 360

User can choose to use the Hierarchical View or List View

Default is the hierarchical view every time the customer object is opened. However, the solution will respect the user's last view selection when going between tabs until the customer object has been closed

Flattened Table View of Records

- No limit on the number of records
- Confirm/unconfirm button will confirm/unconfirm both the contract account and premise on the same line item

One click on the line item will display all the details for the objects in the line selection

Key Business Benefits

- Flexibility to alternate between the views with no limit on the number of records for the list view
- Single confirm for both objects
- Single click to display all object details

The screenshot displays the Utilities 360 interface. At the top, the user's name 'Rachel Green' is visible. Below the navigation bar, there are tabs for 'Hierarchy' and 'Recent History'. A 'Confirmed Objects' section is partially visible. A 'List View (4)' button is highlighted with a red box. Below this, a table of records is shown with columns: Contract Account ID, Contract Account Description, Premise ID, Premise Description, Contract ID, Contract Description, Installation ID, and Installation Description. Three records are visible, all with 'My account' as the description. A red box highlights the first record. Below the table, a detailed view of the selected record is shown, divided into three sections: Contract Account Details, Premise Details, and Contract Details. The Contract Account Details section includes fields for Collective Contract Account, # of Contract Accounts for Collect..., Alternative Payer, Payment Terms, and Zpayment Terms. The Premise Details section includes Premise Type, Connection Object (11591), and Owner. The Contract Details section includes Account Determination ID (Residential Customers), Alternate Portion, Joint Invoicing, and Manual Outsort. The Installation Details section includes Blocking Reason, Industry, MRU, Status, and BIGY_MI (Installation Fully Operational). At the bottom, there is a 'Meter Readings (0)' button.

Utilities: Contract Account Search Enhancement

Contract Accounts ✕

All (1)
🔍 📄 ⬆️ 🏠

Contract Account External ID

Collective Account External ID

Reference No.

Contract Account Category

Contract Account Name

Legacy Account

Max. No. Of Hits

Restore
Go
Save Query
Organize Queries

Contract Account ID	Contract Account Ex...	Contract Account Name	Collective Contract
3001	1097750	My account	

☐
K < 1 / 1 > X
Cancel

Questions for Utilities Call Center and Service

Set as Reviewed Set as Not Reviewed

Business Option	Review Status	In Scope
<div style="margin-left: 5px;"> ▼ Utilities Enhancements (1) </div>		
Do you want to enable basic and advanced search for the Contract Account value help?	Reviewed	<input checked="" type="checkbox"/>

Configure Setting

- Turn on the advance search capability in the scoping question for Utilities

Contract Account Advance Search Enhancements

- Ability to search for a contract account by an attribute/value
- Ability to save the query search setting

Utilities: Contract Account and Premise Information in Live Activity

The screenshot displays the SAP Live Activity Center interface for a customer named Charles Maxwell. The left pane shows a list of activities, and the right pane shows call information. A red box highlights two tables: 'Contract Account (1)' and 'Premise (1)'.

Contract Account (1)

Contract Account External ID	Contract Account Name	Legacy Acco...	Reference Number
1097750	My account		

Premise (1)

Premise ...	PremiseType	Owner	House Number	Street	City
39983	Single Family...		100	Maxwell Street	Palo Alto

Contract Account and Premise Tables in Live Activity

- New tables to show the contract account and premise information
- Upon line selection of the customer, contract account and premise information will display
- Configuration in Live Activity to turn on the feature

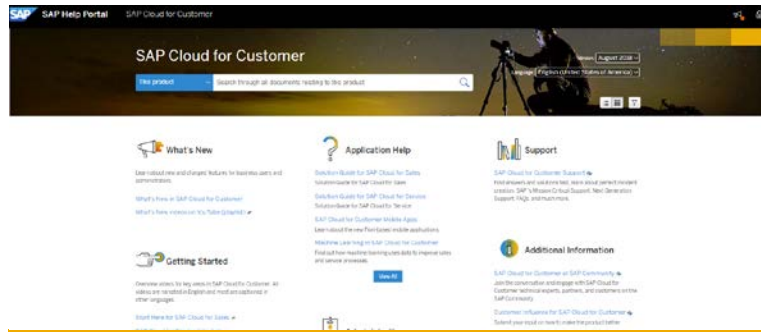
Key Business Benefits

- View of the object information right in live activity
- Hyperlinks available for a quick launch of the objects

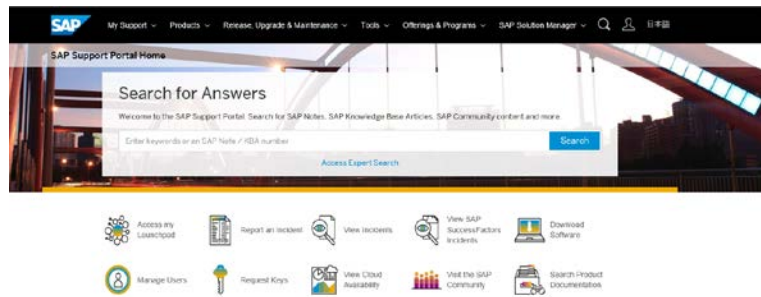
Resources



Resources, Contact, Training and Engagement



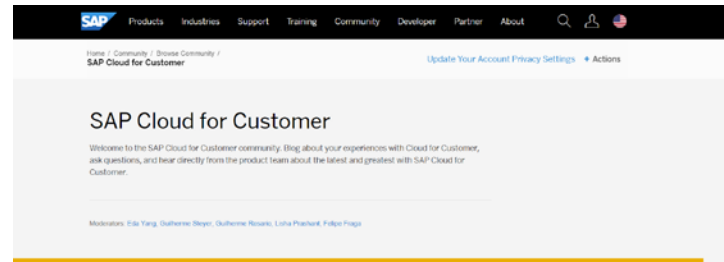
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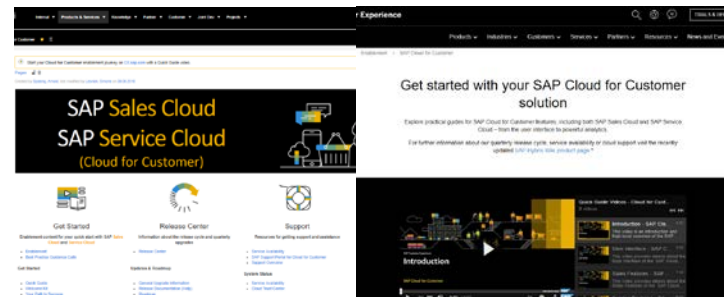


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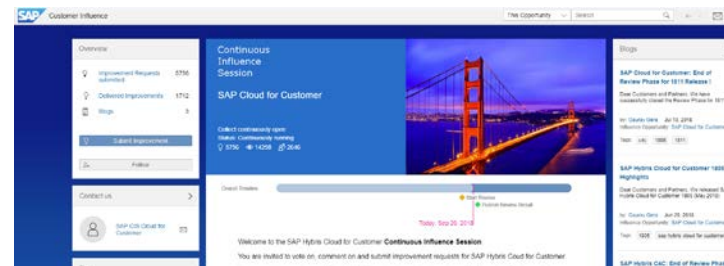


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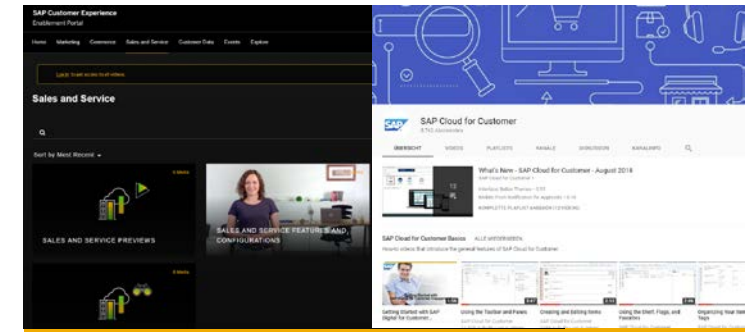
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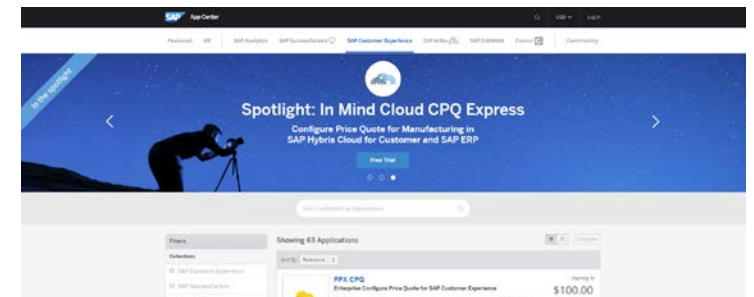
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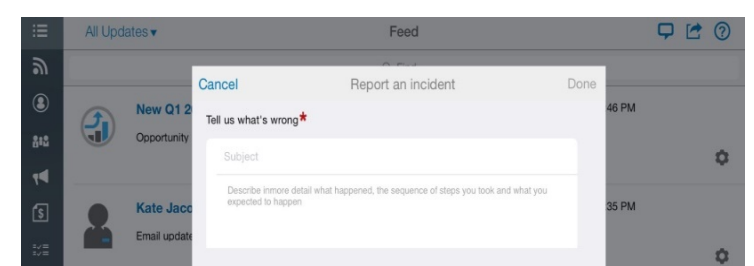
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