What's New in SAP Hybris Cloud for Customer
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1 About the What's New Document

This guide provides information about all the latest new and changed features for SAP Hybris Cloud for Customer.

**Note**
Translations for the content in this document are provided in all standard languages as agreed by SAP. However note that translations are not arranged for the graphics in this document as these are only intended to point to the location of the new features. The graphics are NOT intended to explain the enhancements in any way.

Table 1: Legend for Icons Used in this Document

<table>
<thead>
<tr>
<th>Icon</th>
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<tr>
<td><img src="image1" alt="Icon" /></td>
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<td><img src="image2" alt="Icon" /></td>
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<td>Configuration and Settings</td>
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Can’t see these changes in your system? Check the following:

**Tip**
- **Personalization**
  Many changes are delivered hidden — to use them, personalize the relevant screen.
- **Business configuration settings**
  Some changes require that elements must be added to or updated in scoping for your system. Ask your administrator to check these settings.
2 Master Data and Configuration

Some highlights of developments in this area include active and counted business users determination in the system, automatic update of user’s access rights based on employee assignment change in territory team, a beta feature for offline pricing engine, account hierarchy specific price lists, default department currency in reports, notifications for failed workflow rules, new actions in workflow screens, registered products in account merge and deletion of inactive instances of account merge. Read each section in detail for more information.

Tip
Click on the hyperlinks to find detailed information for each of the topic areas.

Accounts and Contacts [page 5]
In account merge, you can now re-parent registered products and also delete any merge instances that have not yet started. Another interesting development is the ability to determine account type and trigger dynamic navigation from the analytic reports.

Employees [page 7]
The new operating hours type will enable you to log employee work hours in different work categories. Another very useful enhancement is the new data source that allows you to add employee sales data and organization assignment along with the employee role.

Business User [page 10]
Track licenses and active system usage using counted users, user subscriptions and subscription types in your system landscape.

Attributes [page 13]
In this release you can create custom logic for attributes, maintain them in offline mode and access the new data source with expanded search parameters.

Territories [page 15]
Territories has enhancements that allow you to remove exceptions in bulk during realignment runs and to perform realignment runs using an additional parameter.

(Beta) Offline Price Calculation [page 16]
A beta feature for enhanced pricing in offline has been introduced. You will need to reach out to SAP to enable this feature in your test system and also for detailed documentation on how to configure this feature.

Product Lists [page 17]
Enhancements in product lists include exclusion of product selection and the ability to restrict the selection of products and product categories.

Currencies [page 18]
You can now set-up your solution to block the selection of currencies in transactional and master data.

Workflows [page 19]
Notable enhancements for workflows include a scheduled job run to notify administrators of workflow rules that did not run successfully and workflow rule execution status in the workflow changes screen designed to help you track your workflow rules. Other developments include new actions in the workflow rule summary screen as well as in the workflow rules table.
(Beta) Attachments [page 21]
The attachments search feature in a new work center view for - Attachments is designed with advanced search criteria that will help you search for attachments in your cloud solution. Note that this feature is currently supported only as a beta version.

Organizational Management [page 23]
In this release, there is a organizational reporting enhancement. Read on for more information.

Internal Pricing [page 24]
You can now create discount lists that are account hierarchy specific.

2.1 Accounts and Contacts

In account merge, you can now re-parent registered products and also delete any merge instances that have not yet started. Another interesting development is the ability to determine account type and trigger dynamic navigation from the analytic reports.

Read-Only Mode for Specific Attributes Earlier Displayed only in Edit Mode

Certain specific attributes for accounts, contacts, individual customers and employees, that were earlier displayed only in edit mode, can now be displayed in the read-only mode too. The Key User Tool has been enhanced to allow changing the visibility property of these select attributes.

To enable read-only mode for attributes, a key user can change the property from editable mode to Visible in Read and Edit Mode.
**i Note**
The display properties for attributes that you define using Key User Tool are displayed in the HTML5 edition but do not get reflected in the responsive UI based Extended Edition.

**Ability to Delete Account Merge Instances that are in Status - Not Started**

It is now possible to delete instances of account merge that have not yet been initiated and are in status - *Not Started*.

**Registered Products now Considered in Account Merge**

The account merge is now enhanced to consider reassignment of registered products. Therefore, in instances of account duplication, registered products of a duplicate account will now be merged to the master account.

**Dynamic Navigation from Customer Data Sources**

When you select *Account Details* in any of the reports for customer datasources in the *Analysis* work center view, the system will dynamically determine if the customer is a corporate account or an individual customer and will navigate to the corresponding customer.
Contact Person Business Address Snapshot Now Available in Offline

Contact person business address snapshot is now considered in offline mode. If a new contact is created in offline with the contact person business address data, the address snapshot is also derived in the consuming objects such as sales orders, quotes, etc.

Sales Quote in Accounts Displays Related Quotes

From the customer business object, select the Sales Quote tab. The display shows the related quotes independent of party role of the account (header or item party).

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2.2 Employees

The new operating hours type will enable you to log employee work hours in different work categories. Another very useful enhancement is the new data source that allows you to add employee sales data and organization assignment along with the employee role.

Attribute - Working Hours Type, in the Employee Working Hours Data Model

You can now configure multiple working hour types such as on-duty, overtime etc., for employees. A new attribute - Working Hours Type has been introduced for employees. The employee and user data workbench
object also has been enhanced to include the working hour type when creating working hour records during initial upload of employees.

You can configure the Operating Hours Type in the new BC configuration activity Maintain Working Hours Type. You will find this configuration under Business Configuration Activity List Demand Processing.

Data Source to Include Employee Sales Data and Organization Assignment

Now, a new data source BP_EMPLOYEE_DETAILS has been provided and this includes the sales area and sales organizational assignments along with the employee role.

Note

The employee assignment (as Employee role) to multiple sales organizational units is already possible in the solution. Examples of the employee role include roles such as manager, primary org assignment, secondary org assignment, etc.
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2.3 Business User

Track licenses and active system usage using counted users, user subscriptions and subscription types in your system landscape.

Counted and Active Business Users Determination in the System

Administrators can now determine how many business users in the system are counted and active users. A new attribute - Counted User is included in the Business User overview screen. This attribute displays the number of counted users on any given date. A counted user is a business user valid on the current date and is unlocked (the User Locked and the Password Lock flags are not set).

A scheduled job run in the system updates the counted users in the system. Note that the determination for a counted user is internal to the system and is a display-only feature.

Track Users using Subscription Type

You can also map the business users to a valid user subscription type in order to track the user subscription type that they consume.
In the Business User screen, use the new action User Subscriptions to assign a User Type and User Subscription to a business user. The user type that you choose will determine the allowed and possible user subscriptions for a business user.

Advanced Search for Business Users Enhanced

The business user advanced search has been enhanced with three new attributes namely the Counted User, User Type, and User Subscription. You can now search for a counted user who is assigned to a user type and to a specific user subscription.

Automatic Update of User’s Access Rights

Changing the employee assignment in a Territory Team, the Org. Structure, or the My Workforce relationships will automatically trigger an access rights update for the employee.

Note

A background job now runs each hour (instead of at midnight) to trigger the business user update.
Enhanced Restriction Rules for Access Context 1015

You can now grant data access based on the employee’s assignment to an account from the account team or territory team for Access Context 1015 which applies to opportunities, leads, sales quotes, and sales orders. The following restriction rules have been added:

- Restriction rule 11 for Access Context 1015 (Employee, Accounts (Account Team))
- Restriction rule 12 for Access Context 1015 (Employee, Accounts (Account and Territory Team))

Note
The account queries My Account Team’s Accounts or My Territory Team’s Accounts should not exceed 1000 (per team).

Restrict Access to Unassigned Data Records Business Option

This business option allows you to control data access only based on the criteria defined by the restriction rules of a business role. Data records without any assignment applicable for the corresponding access context will not be visible to a business user that has restricted access to a business object, once this option is selected.

Note
A change in this scoping question (check or uncheck) triggers a mass data run in the backend. Once the selection has been made, please be aware of the time delay (possible next day) for existing records.
Access to products without any sales data will still be granted independent of this scope selection.

To apply the business option, navigate to Business Configuration > Implementation Focus > Edit Project Scope > Scoping > Questions > Built-in Services and Support > System Management > User and Access Management. Ensure there is a check mark for the question Do you want in general restrict access to data records that do not contain any access restriction relevant content?

Restrict Access to Unassigned Contracts

If before the February 2017 release, a contract was not assigned to a sales organization, there is an unrestricted access for all users without access limits. This means any users without access limits can view and edit the contract details.

In the February 2017 release, it is now possible to restrict contract access without a sales data assignment using a business option. The Remove the Unassigned Authorization for Data records business option allows you to control data access based only on the criteria defined by the restriction rules of a business role.

Once this option is selected, data records without any assignment applicable for the corresponding access context will not be visible to a business user that has restricted access to a business object. Important: A change
in this scoping question (check or uncheck) triggers a mass data run in the backend. Once the selection has been made, please be aware of the time delay (possibly the next day) for existing records.

**Note**
Access to products without any sales data will still be granted independent of this scope selection

To access the business option, navigate to [Business Configuration > Implementation Projects > Questions > Built-in Services and Support > System Management > User and Access Management] ensure there is a check mark in question *Do you want in general restrict access to data records that do not contain any access restriction relevant content?*

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### 2.4 Attributes

In this release you can create custom logic for attributes, maintain them in offline mode and access the new data source with expanded search parameters.

### Enhanced Data Source for Attributes

Attributes are used to enhance master data. You can create an attribute set as a collection of additional characteristics that you may want to capture for your master data. For example, you may want to maintain profile details for your contacts.
The new data sources Business Partner with Attribute Assignment (CODBUSATTRBP) and the Attribute Assignment (CODBUSATTRGEN) can now be used to define analytic reports on attributes linked with master data such as accounts and contacts. This new data source allows you to expand your search parameters. The previous data sources (CODBUSATTRP) and (CODBUSATTRGENB) are deprecated. We recommend using the new data sources.

Attributes in Offline Mode

In offline mode, you can maintain attributes by creating, editing and deleting them in Contacts and Individual Customers.

Attributes Enabled for Customer Logic

In this release, you can create custom logic, using the Cloud Application Studio, when attributes are added to master data such as accounts or contacts. You can customize your attributes and attribute sets so that, for example, accessible attributes can be added according to a user’s region.

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2.5 Territories

Territories has enhancements that allow you to remove exceptions in bulk during realignment runs and to perform realignment runs using an additional parameter.

**Account Owner Column Now Available in Territory Realignment Rule Definition**

Now, when you make changes to territories and when you want to perform a Realignment Run, the territory rules that you create to do this have an additional parameter called Account Owner. Accordingly, when you open your territory rules, a new column called Account Owner will be listed among other optional fields you can use to define territory rule assignments.

To display this column, you need to adapt the field by selecting the Adapt Columns in Administrator Realignment Runs Maintain Territory Rules. After you've selected a territory rule to maintain from the Split Territory Rules screen, select Adapt Columns to add the field.

**Remove All Exceptions Now Available in the Territory Realignment Procedure**

When defining new realignment runs, in the Define Exceptions section, you can now select Remove All Exceptions. Previously, you needed to select each exception that you wanted to remove. This update allows you to choose to remove them all with one click.

Parent topic: Master Data and Configuration [page 4]
2.6  (Beta) Offline Price Calculation

A beta feature for enhanced pricing in offline has been introduced. You will need to reach out to SAP to enable this feature in your test system and also for detailed documentation on how to configure this feature.

(Beta) Offline Pricing Engine

Offline price calculation as part of this beta release is available only for sales quotes, sales orders and tickets.

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2.7 Product Lists

Enhancements in product lists include exclusion of product selection and the ability to restrict the selection of products and product categories.

Exclusion of Product Selection through the Product Lists

As an Administrator, you can now exclude products and/or product categories from a product list selection. Products from those lists will not be visible in the product list item selection in a sales transaction. The user will receive an error message stating Product <ID> not valid; it is excluded by at least one product list.

For this new function, no configuration is necessary; select Product Exclusion from the Type list.

Restriction of Product Selection through the Product Lists

As an Administrator, you can restrict the selection for products/product categories in sales transactions based on a restricted product list. Only products from those lists are allowed to be added to a sales transaction. In addition, products from those lists can only be added to a sales transaction. The user will receive an error message stating Product <ID> not valid; it is not allowed (restricted by product list) if a product is selected outside a valid restricted product list.

For this new function, no configuration is necessary; select Product Restriction from the Type list.
2.8 Currencies

You can now set-up your solution to block the selection of currencies in transactional and master data.

Block Currency Selection in Fine-Tune Activity List

As an Administrator, you will navigate to the Activity List and select the fine-tuning activity Currencies. Deselect the currencies that are not relevant for your business and save your entries.

Note

Entering a blocked currency code to a transaction or in master data is not allowed.

Default Department Currency in Reports

You can now default the currencies in reports based on the department currency of the user.

The function defaults the currency of a user’s primary Org Unit assignment as an employee. If a currency is not maintained for the department, the system checks the next highest Org Unit in the hierarchy which contains a currency.
2.9 Workflows

Notable enhancements for workflows include a scheduled job run to notify administrators of workflow rules that did not run successfully and workflow rule execution status in the workflow changes screen designed to help you track your workflow rules. Other developments include new actions in the workflow rule summary screen as well as in the workflow rules table.

Notifications for Failed Workflow Rules

Notifications for failed workflow rules will now be generated using an hourly background scheduled run. Note that the notifications are generated only if there are failed workflow rules in the scheduled run. For each of the background job, you can see how many workflow rules have failed.

You will need administrator authorization to view the failed workflow rules notifications. To view the logs, follow these steps:

1. Click on the Notifications icon on your screen.
   The list contains notifications for each of the hourly scheduled job runs to track failed workflow rules. Each notification also displays the number of workflow rules that have failed in that scheduled run.
2. Click on a notification to view the failed workflow rules.
3. Next, click on More to view details of the failed workflow rule.
4. Click on an object ID to view for which instance the workflow rule failed.
5. Next, click on an instance to navigate to the rule summary details.
Workflow Rule Execution Status in *Workflow Changes* Screen

You can now see the execution status for a workflow rule in the *Past Rules* table under *Workflow Changes*.

---

New Inline Actions in Workflow Rules

The *Workflow Rules* table now has a new column - *Actions* with inline actions for *Copy*, *Edit*, and *Delete* of workflow rules.

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New Actions in Rule Summary Screen

Click on a workflow rule under *Notifications* or in the *Workflow Changes* screen (of a business object such as visit, tickets, etc.) to display a summary of a workflow rule. New actions for *Edit*, *Copy*, *Activate*, and *Deactivate* have also been added to the *Rule Summary* screen.
### 2.10 (Beta) Attachments

The attachments search feature in a new work center view for - Attachments is designed with advanced search criteria that will help you search for attachments in your cloud solution. Note that this feature is currently supported only as a beta version.

### Attachments Search

The new Attachments work center view under the Library work center supports search for all attachments that are uploaded for various business objects. The current release supports the complete attachments search
functionality for sales orders, accounts, sales quotes, opportunities, visits, appointments, activities, and e-mail business objects.

Tip

The search result is restricted to 5000 entries.

Salient features of the attachment search functionality are:

- Search for all documents maintained for a business object
- Use advanced search to search using Object ID, Name, Uploaded By, Uploaded On, etc.
- Navigate (from the search screen) to the target business object
- Use the same access restrictions maintained for specific business object to allow or restrict access to attachments.
- Delete an attachment from a business object and this also deletes the document from the list in the Attachments work center view. Similarly you will find that any corresponding actions such as create or edit will be updated in the Attachments work center view.
- Sort the search results set in ascending or descending by standard criteria and the appropriate data appears in the search results table.

Note

Sorting is not possible for the column - **Thumbnail**.

- Use action - Download to download a single file. You can also select multiple files for download. This downloads a compressed zip file containing the selected files.
- Use action - Refresh to update the Attachments work center view with any changes that you have made to the attachments in the business objects.

Parent topic: Master Data and Configuration [page 4]
2.11 Organizational Management

In this release, there is a organizational reporting enhancement. Read on for more information.

Organizational Management Reporting Enhancements

In this release, the following organizational management reporting enhancements are available:

- An enhanced attribute selection in value help of /MOM/FUNCUNIT which improves the org. unit query.
- Data sources (MDAVs) which allows Parent Org. Unit display.
- Drill down based on company hierarchy.

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2.12 Internal Pricing

You can now create discount lists that are account hierarchy specific.

Account Hierarchy Specific Discount Lists for Internal Pricing

Creating a sales transaction with an account belonging to an account hierarchy will determine the discount list that is account hierarchy-specific for a sales transaction using internal pricing.

As an Administrator, you’ll need to set-up this functionality by navigating to Business Configuration ➔ Implementation Projects ➔ Questions ➔ General Business Data ➔ Product and Service Pricing ➔ Sales Price and Discount Lists. Ensure there is a check mark for the question Do you want to maintain discount lists for account hierarchies? Click Next and confirm your entries.

Note
Discount lists can only consider up to five (5) levels within a hierarchy.

Below find the determination logic of discount lists in sales transactions:

1. Customer Specific Discount Products
2. Account Hierarchy Specific Discount List
3. Customer Specific Discount Product Category
4. Overall Customer Discount
5. Overall Customer Group Discount

Note
If both account hierarchy product specific and customer product specific discounts are maintained then both will be considered for calculation (just like other discounts).

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3 Sales

Exclusion and restriction product lists to add products in sales orders, percentage based revenue splits for opportunities, all-day visits in routes, signature capture in surveys, aggregation of survey results, promotions copy - you will find these and many more interesting enhancements in the sales solution.

➤ Tip

Click on the hyperlinks to find detailed information for each of the topic areas.

Leads [page 27]
In this release, SAP Hybris Cloud for Customer enhanced ODATA services in Leads, enabled persistent data upon lead conversion and made additions to Contacts and Individual Customers in offline mode.

Opportunities [page 30]
New features such as the ability to do percentage-based revenue splits and new data sources for opportunity contacts and predecessor activities, are included with this release.

Sales Quotes [page 31]
A few of the significant new features and enhancements in sales quotes include extension field updates, sales quote output and channel determination, and advanced search ship-to parties.

Sales Orders [page 35]
We have a lot many new features that are intended to enhance the solution experience for sales orders. New offline price calculation, exclusion and restriction product lists to add products, offline enablement of product master extensions, and offline availability of many existing features, etc. Read on in detail for more information on the interesting features.

Forecasting [page 41]
This mobile feature allows you to maintain forecasts including, creating new forecasts as well as editing and submitting them, right from your mobile solution.

Activities [page 42]
New features in activities include the availability of Activity Lists, e-mail in offline mode and enhancements to Visits and Activities when you add contacts.

Visits [page 44]
Enhancements to visits include the ability to create follow-up tasks for visits, route search enhancements, the ability to create all day visits and more. To find out more read the section below.

Surveys [page 46]
Keeping pace with the previous releases, you will see some really significant enhancements to surveys functionality. To name a few, product images for product surveys, graphical signature capture, aggregation of survey results, ability to design flexible matrix surveys and much more.

Promotions [page 51]
Promotion copy is a valuable feature that allows you to create new promotions for an account using the same basic data and thus saves you time in building promotion data.

Marketing [page 52]
You can now migrate your campaign data using the Data Workbench tool. There are also a plenty of performance improvements and UI specific enhancements for the marketing objects.
Buying Center [page 54]
Buying center enhancements include attitude indicators, role views, and the ability to review contacts who are not connected in the buying center relationship tree.

3.1 Leads

In this release, SAP Hybris Cloud for Customer enhanced ODATA services in Leads, enabled persistent data upon lead conversion and made additions to Contacts and Individual Customers in offline mode.

Sales Area Data Persists upon Lead Conversion

When converting a lead to a brand new account or to account and contact, the sales data persists from the lead to the account.

As an administrator, you can enable persistent sales area data by navigating to Sales > Lead Management > Leads > Lead Sales Area Defaulting During Conversion and answering Yes to the following scoping question: Do you want to keep your lead’s Sales Area Data (Sales Org, Distribution Channel, Division etc ) when converting a lead to a customer?
Offline - Leads, Opportunities and Attributes Available in Contacts and Individual Customers

In Contacts and Individual Customers, you can access the Lead, Opportunity and Attributes tabs. This means, when you are in Contacts, Individual Customers, or Attributes, you can create leads, opportunities, and attributes.

Sales Lead Is Obsolete

Sales Lead is obsolete. You must now use Lead to consume and display lead data. To ensure that you don't unintentionally use the Sales Lead, a check is conducted automatically upon scoping.

Note
To avoid losing data, you must move the Sales Lead data before switching to Lead.

Lead Entity Added to C4CODATA Service

The Lead ODATA service is now directly consumable and you can use this service to create and upload leads from any external system.
**Enhancements to Lead Reporting**

In the standard report view, the reports below excluded leads when there was no assigned marketing owner. With this release, these reports will now include leads that don’t have an assigned marketing owner.

- *Lead Conversion Rate – Last 12 Months report*
- *Lead Funnel Report*
- *Sales Effectiveness Scorecard*

**Leads by Status Report**

In the standard report view, the *Leads by Status* report excluded leads where no sales owner had been assigned. This report now considers all leads when reporting the status.

**Customer Insight Reports**

In the standard report view, the customer insight reports below only included leads with the status *Qualified* and where the qualification level was *Hot*. With this release, these reports will show all leads with status *Qualified*.

- Customer Insight - Lead by Source
- Customer Insight - List of Leads

Parent topic: Sales [page 26]

**Related Information**

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- Sales Quotes [page 31]
- Sales Orders [page 35]
- Forecasting [page 41]
- Activities [page 42]
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3.2 Opportunities

New features such as the ability to do percentage-based revenue splits and new data sources for opportunity contacts and predecessor activities, are included with this release.

Create Percentage-Based Revenue Splits

You can now use percentages to define revenue splits for your opportunities. When you select Add to include a revenue partner to a products revenue schedule and have previously edited their percentage split information, the partners split amount is automatically set for the revenue partner in the revenue scheduler.

Note

Revenue Split Percentage is a hidden column, and you must personalize the column to include it in the Revenue Splits tab.

New Data Source for Opportunity Contacts

The new data source, Opportunity Contacts(CODOPPCONTB), allows you to collect all information for contacts listed in an opportunity. This data source is based on the opportunity’s contact and can be combined with Involved Party data to obtain specific details concerning your contacts. In previous releases, only the primary contact’s information was available.

To use this data source, navigate to Business Analytics > Design Data Source > Create Reports.
New Data Source for Activities with Predecessor Opportunities

All Activities with Predecessor Opportunities (CODOACTB) is the new data source for all activities with predecessor Opportunities. The existing data source All Activities with Predecessor Opportunities (Deprecated) (CODOACTU) is now deprecated and we recommend that you use the new data source (CODOACTB).

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3.3 Sales Quotes

A few of the significant new features and enhancements in sales quotes include extension field updates, sales quote output and channel determination, and advanced search ship-to parties.

Bi-directional Sales Quote Replication with SAP ERP

You can now add a status to the sales quote that represent the consistency of a sales quote.

You can now replicate sales quotes from SAP Hybris Cloud for Customer with SAP ERP. In addition, you can now edit sales quotes replicated from SAP ERP with SAP Hybris Cloud for Customer. The new statuses for SAP Hybris Cloud for Customer with SAP ERP are as follow:

- **Transfer Status** - Not Started, In Process, Finished
- **Reference Status** (For follow-up order created) - Not Started, In Process (corresponding to Partially Referenced in ERP, Finished
- **Cancellation Status** - Canceled, Not Cancelled, Partially Cancelled
As of release 1702 (February 2017), for bi-directional sales quote exchanges, a follow-up sales order needs to be triggered in SAP ERP.

**Note**

In the document flow, you will be able to view the print quote details derived from SAP ERP. You cannot generate print details directly from the sales quote.

Quotes that are transferred after approval need special attention in case of further edits and re-approval is not available.

To configure the bi-directional exchange, administrators will need to review the scoping questions by navigating to **Business Configuration > Implementation Projects > Edit Project Scope > Questions > Communication and Information Exchange > Integration with External Applications and Solutions > Integration into Sales, Service, and Marketing Processes**. Ensure there are check marks on the following where desired:

- Do you want to replicate sales quotes from an external application or solution to your cloud solution?
- Do you want to replicate sales quotes from your cloud solution to an external application or solution?

**Fine-Tune the Bi-Directional Sales Quote Exchange with SAP ERP**

To activate the replication of sales quotes per document type the following fields will be used:

- **Replication** - When this field is selected, the system will transfer sales quotes using the submit action from the your cloud solution to an SAP On-Premise system. It also allows editing of replicated sales quotes created in your on-premise system to your cloud solution.
- **Direct Customer Acceptance** - By selecting this field, sales quote output document submission will be disabled. The configuration is enabled through replication.

To use this functionality, navigate to **Business Configuration > Implementation Projects > Edit Project Scope > Open Activity List > Fine-Tune > All Activities > Sales Quotes > Document Types > Maintain Document Types**.

**Bi-Directional Sales Quote Exchange with SAP ERP Transfer Status**

If the transfer status is **Interrupted**, transfer log details (on the user’s sales quote tab) are displayed. Saving the quote should trigger a new replication.

**Tip**

Use **Adapt** or **Personalize** to ensure the **Transfer Logs** tab is visible.
Consistency Status Field Availability

You can now view a status to the sales quote that represents the consistency of a sales quote.

**Note**

A quote with status *Inconsistent* cannot be submitted to a customer.

The new field *Consistency Status* can be added by navigating to Personalize or Adapt > Advanced search > work list > Quick view > detail view.

**Note**

Incorrect pricing is represented by its own pricing status.

Sales Quote Output and Channel Determination Enhancements

You can now default Sales Quote’s form templates or output channels by sales organizations. You can do so by adapting the columns to make a new selection of attributes visible in this table. You will need to navigate out of the screen and return to it to see the changes.

To enhance the forms, navigate to Administrator > Input and Output Management > Output Channel Selection > Form Template Selection and select Show Rules for Sales Quote.

Availability of Lean Output History in Sales Quote Overview

From a sales quote, the new *Output* section of the *Overview* has been replaced. With this new functionality, once the sales quote detail view is opened, the performance increases.

Customer Extensions on Item Level

You can now cluster extension fields on product item level in a separate section below the product table using adaption.

To add the extension, navigate to Personalize or Adapt > select Products > Add Section > ensure there is a check mark (Visible) in Customer Extensions. Click Apply and exit from the Personalize or Adapt mode.
View and Edit Notes for Sales Quotes

You can now view and edit quote header notes (plain text or rich text) in the Notes tab which is available in an enlarged communication pane.

**Tip**
To display Notes from the sale quote, navigate to **Adapt > Edit Master Layout > Notes > Apply** and select End Layout Changes to exit from the Adapt mode.

Ship-to Party on Item Level Advanced Search

In this release, you can use the Advanced Search functionality search for Ship-to Party on item level.

Ability to Copy Quote When Working Offline

When using the Extended Edition of the tablet in offline mode, you can now copy a quote. From the details view of the sales quote, select **Actions > Copy**.

**Note**
Copy of extension fields are not yet supported.

Product Category Availability for Output Message Form

As an Administrator, you can now add Product Category into your sales quote output form.

Header and Item Attachments Availability for Approved Quotes

As an end-user, you can now add an attachment for approved quotes without the need for re-approval.

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3.4 Sales Orders

We have a lot many new features that are intended to enhance the solution experience for sales orders. New offline price calculation, exclusion and restriction product lists to add products, offline enablement of product master extensions, and offline availability of many existing features, etc. Read on in detail for more information on the interesting features.

Product Lists of Type Exclusion or Restriction in Selection of Products

You can now use product lists of type Restriction and Exclusion to limit or exclude products from appearing for selection. Restriction list limits the selection of products. When you use restriction lists, only those products included in the list appear for selection in sales document. On the other hand, exclusion list is a set of products that are excluded from appearing for selection.

Note

The product lists must belong to the same sales area as that of the account for which you are creating these product lists.

To use this feature, you must have already created the following product lists of type:

- Restriction and added a set of products that you want to limit the selection to.
- Exclusion and added a set of products that you want to exclude from selection.

In the sales order quick create, when you add products using product lists, you will see that the product lists (of type Proposal and Restriction) are displayed to the left of your screen and the products available for selection are shown to the right of the screen. The following conditions apply for the display of product lists and products:

- Only valid product list of type Proposal and Restriction should appear in the product lists section on the left of your screen.
• The products entries for any product list should not contain the excluded products.

i Note
The exclusion or restriction product lists are also valid in scenarios where products are manually added in a sales order. So if you add a product and that product belongs to an exclusion or restriction product list, the same validations and considerations as described above will apply.

i Note
This feature is also available in the offline version of Extended Edition.

Validations and Messages: The product restriction and exclusion lists will be considered for product determination if the following criteria are fulfilled:

• Products:
  ○ If a product is included in both restriction and exclusion list, then the exclusion list criteria will take precedence.
  ○ If you add products that are included in an exclusion list, then a validation check ensures that the product is not added to the sales document. Similarly, if a product is not part of a restriction list, then a similar validation check as above applies.
  ○ Products enrolled in the lists are active in product master.

• Validity:
  ○ The validity of proposed products is the same as that of the product list. However, if you modify the validity of a product and it is no longer within the validity of the product lists, then the product does not appear for selection.
  ○ Product lists should be valid within the date range of the sales document.

• Sales Area:
  ○ Product sales area is active.
  ○ Product list account and sales area should match with that of the sales document.

i Note
If no account is maintained, then the product list is considered valid for all sales documents.

• Excluded product categories - The behaviour of the feature for exclusion list is also valid for excluded product categories.

New Action - Estimate Price for Offline Orders

A new action - *Estimate Price* is now available in the fast order entry screen and the *Products* screen in sales orders. This action is enabled only for orders created offline and not yet synced to online.

i Note
This feature is part of the shipment for offline pricing engine and therefore the action *Estimate Price* is visible only if scoping for offline pricing is enabled. Prior to this release, offline price estimation was determined in the
system after you added products to the sales order. With the new development, you need to explicitly request for an estimated price using this action.

Offline - Limit Selection of Products Only Using Product Lists

You can now restrict the options available for adding products in offline sales orders to using only product lists. This setting enables product selection only if the products belong to a valid or active product list.

To do this, you need to select the scoping question - **Do you want to allow adding products only from product lists?**. You will find this setting under Business Configuration ➤ Edit Project Scope ➤ Scoping Questions ➤ Sales ➤ New Business ➤ Sales Orders.

Note

This feature is already available for online sales orders.

Requested Delivery Date for Order Items

Prior to this release, it was possible to maintain the requested delivery date only at the header level for sales orders. It is now possible to maintain the requested delivery date at the item level in sales orders. This feature allows you to enter different delivery times for different order items and thus prioritize item deliveries.

Initially, when you click on a product or item, the requested delivery date maintained in the sales order header is copied for the item. You can modify this date but must ensure that the date is greater than the current date.
**Note**

If you have already modified the requested delivery date for an item, then any changes that you make later to the header level requested delivery date, will not impact the individual items.

When you transfer the sales order to SAP ERP system, the requested delivery date displays as the **First Delivery Date** for the product in the ERP system. Similarly, updates in the ERP system will also be reflected in the cloud solution.

**Note**

**Requested Delivery Date** can be modified only until the product item is not delivered or is partly delivered. This date is not modifiable once the item is completely delivered. Also, this date is not displayed for text products.

---

**Optimization of Order Entry Screen**

🔍 Performance improvements have been made to the sales order entry screen on the client side in the cloud system that significantly reduce the response times.

**Search for Sales Orders using Product Category ID**

🔍 Search for sales orders is now possible using product category ID. The new field **Product Category ID** is personalized hidden and you can add the same to the sales order advanced search.

In the Extended Edition, you can also use multiple product categories to trigger a search for sales orders. Use the **More Options** icon to select multiple product categories.
Extensions made to Product Master Available for Offline Sales Orders

You can now extend the extensions that you create for Product Master to offline sales documents (sales quotes and sales orders).

You need to enable the corresponding Product Master extension scenario.
Quick Add Action to Add Products, Now Available for Offline Sales Orders

The Quick Add option for adding products is now enabled for offline sales orders. This menu action navigates you to the Fast Order Entry screen where you see an empty item proposal table and standard ordering options like Past Orders, Promotions and Product Lists to add products. Note that this feature is already available for online sales orders.

Personalize and Set Quantity Increment Across Screens

The feature to configure incremental item quantities is already available for sales documents. Now, you can also personalize the default incremental item quantities that you have configured. Further, these personalization settings will be applicable across screens where the product Quick Add and Add Product (in multiple UoMs) features are available. The settings are also retained across the different screens and applied for future sales orders.

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3.5 Forecasting

This mobile feature allows you to maintain forecasts including, creating new forecasts as well as editing and submitting them, right from your mobile solution.

Mobile forecasting Now Enabled in Fiori Client

You can now use SAP Hybris Cloud for Customer’s mobile feature to edit and submit forecasts. You can also view previous forecasting sales data, review your opportunities, and different versions of your forecasts. Additionally, this feature allows you to update your forecast’s dollar amount and submit new forecasts.

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- Activities [page 42]
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3.6 Activities

New features in activities include the availability of Activity Lists, e-mail in offline mode and enhancements to Visits and Activities when you add contacts.

Search for Contacts Related to Account in Visits and Activities

You can now use the Related to Account default set to show all contacts related to an activity’s or visit’s account, while online or in offline mode.

Offline - Determination of an Activity or Visit Owner is the Logged in User

In offline mode, the solution defaults the user who is logged in as the owner and organizer.

Note
You can change the owner of an activity or visit by assigning an owner or organizer manually.

Activity Lists Enabled in Fiori Client and Extended Edition

In SAP Hybris Cloud for Customer Extended Edition, Activity Lists are now enabled. You can use activity lists to create mass activities for one or more sales persons, at which point your sales associates can execute their given activities.
As an administrator, you can enable activity lists by appropriately answering the following scoping question: 

Do you want to record information from activity lists in your system? in Business Configuration Project Scoping Activity Management Questions.

View E-mails Offline

In offline mode, you can view your emails as a read-only feature. This functionality includes filters such as My Emails and other saved queries.

Enhanced Reporting Data for Tasks, Phone Calls and Emails

You can now use the following additional fields for task, phone calls and email reporting:

Table 2: New Reporting Data Fields

<table>
<thead>
<tr>
<th>Task Data Source</th>
<th>Phone Call Data Source</th>
<th>E-mail Data Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preceding Campaign</td>
<td>Preceding Campaign</td>
<td>Sales Territory</td>
</tr>
<tr>
<td>Preceding Campaign Response Option</td>
<td>Preceding Campaign Response Option</td>
<td>Sales Territory ID</td>
</tr>
<tr>
<td>Changed On Date/Time (Local Time Zone + UTC)</td>
<td>Sales Territory</td>
<td></td>
</tr>
<tr>
<td>Changed On Date (Local Time Zone + UTC)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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3.7 Visits

Enhancements to visits include the ability to create follow-up tasks for visits, route search enhancements, the ability to create all day visits and more. To find out more read the section below.

Create Follow-Up Tasks

In this release, you now have the ability to create follow-up tasks for your visits.
Route Search Capability Enhanced

When adding an account to a route, you can use search to find accounts that are due for visits. When you run the search, the Visit Between End Date field is blank and the system returns a list of all accounts that are due for visits.

Search by Postal Code and Campaign, in Visits

When searching for visits, you can now use the advanced search filter capability, including search by postal code and campaign.

Create All-Day Visits in Routes

When planning your routes, you can create all-day visits by selecting the All-Day Event check box.
Create Reports for *Visit Tasks and Surveys* Data Source with Account Master Data Reference

In previous releases, account master data was not available for reference when creating reports from the *Visit Tasks and Surveys* data source. Now, you can create reports that reference standard or extension fields from account master data.

To create reports go to, [Business Analytics ➤ Design Reports](#).

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3.8 Surveys

Keeping pace with the previous releases, you will see some really significant enhancements to surveys functionality. To name a few, product images for product surveys, graphical signature capture, aggregation of survey results, ability to design flexible matrix surveys and much more.

Signature Capture for Surveys

You can now capture signature in a survey on Submit of the survey. When you complete and submit a survey, a dialog box prompt is displayed to capture signature. You can use the mouse buttons to capture a graphical signature and then click on Add Signature. On signature capture, the survey status is set to Completed. The survey can no longer be modified. Generate the survey summary and then validate the signature at the end of the survey summary pdf.
You can also view the *Signed Status* for a survey. The following statuses are set by the system:

- **Signed** – Indicates that the signature has been added.
- **Not Signed** – Indicates that the signature has not been added. This status also indicates that signature is optional for the survey.
- **Blank** – Indicates that the signature is not required for the survey.

The following conditions apply for using this feature:

- Signature capture is possible only in the Extended Edition. In the HTML5 edition, you can still capture a signature but the survey status will not be set to *Completed*.
- The feature is allowed only for internal surveys (and not supported for external or satisfaction surveys).

To capture the signature, you need to add a question of type *Signature* to your survey during survey design. You can also set a signature as mandatory by selecting the *Mandatory* flag. If you define the *Signature* question as mandatory, then a validation check ensures that the survey is not completed without a signature.

Note

Currently, only one signature element or question type is allowed for a single survey.
Aggregation of Survey Results for Matrix Surveys Displayed in Survey Summary

The survey aggregated scores are now displayed in the survey summary pdf. You will find the aggregated scores at the bottom of the survey summary pdf document. Note that to generate the survey summary, you must have already completed and submitted the survey. The aggregation for product and checklist type surveys is as follows:

The aggregation is performed both for scores (assigned for questions and answers) as well as for answer options (in a question). The aggregation is calculated as follows:

- **Scores for product surveys** - Product level maximum and actual scores
- **Scores for checklist type surveys** - Question level maximum and actual scores
- **Answer options** (Relevant only for product surveys) - Actual count and the percentage value are displayed for the answer options selected for a question.

The following criteria apply for aggregation of survey results:

- Aggregation is calculated only for **Amount**, **Multiple Choice**, and **Quantity** based questions
- Aggregation rules can be displayed as: **Absolute Value** (valid for multiple choice questions) and **Percentage Average** (valid only for amount and quantity type of questions)

Note

You must have maintained scores at each question and answer option level when designing a survey.

Option to Use Previous Answers Now at Survey Question Level

You now have the flexibility to choose for each survey question, if you need to copy the previous answers (for example, from a previous visit). Previously, you could select the **Include Previous Answers** flag in the survey header and all answers from a previous visit’s survey would get copied for the current survey.

Now, an additional new flag - **Exclude Previous Answers** flag is available at the individual survey question level. Select this flag if you do not need copy previous answers for a specific question in the survey.

Note

The **Exclude Previous Answers** flag appears in survey questions only if you have selected the flag **Include Previous Answers** in the survey header.
Define Matrix Questions in Checklist Surveys

You can now define matrix questions within a checklist type of survey. This flexibility allows you to create multiple matrix and non-matrix type of questions within a checklist survey. The following possibilities are offered:

- Flexibility to define the rows and columns of a matrix question
- Answer options restricted to:
  - Radio Buttons
  - Check boxes
  - Numeric Box
  - Multiple-choice Single Select option

Thumbnail Display for Product Images

Product Images: Product images can be displayed as thumbnails in surveys. This helps survey respondents with better identification of products when completing surveys. The images are displayed when products are added to surveys.
To display product images, you need to select the scoping question - *For Survey Execution in Extended Edition, do you want to display the product image along with the ID and Description?*. You will find the scoping question under **Sales > Account and Activity Management > Activity Management > Group: Product Image in Survey**.

**Sort and Search for Products Available in Extended Edition**

In the Extended Edition, you can now sort and search for products in a product survey. Dynamic filtering also triggers a search using the characters entered in the search box.

**Dynamic Column Width Adjustment for Matrix Surveys**

The column width dynamically adjusts to the length of the question. A default setting predefines the maximum and minimum width of columns that the dynamic adjustment must adhere to.

Parent topic: **Sales [page 26]**
3.9 Promotions

Promotion copy is a valuable feature that allows you to create new promotions for an account using the same basic data and thus saves you time in building promotion data.

Copy to Create New Promotions

Actions in promotions are enhanced with a new feature - Copy. Use this action to create copies of existing promotions. There are no restrictions on the type of promotions that can be copied; All promotions that reside in your cloud solution, (including promotions created in your cloud solution or replicated from SAP CRM) and irrespective of their status, can be copied.
All basic data (except the promotion name) get copied. The account for which you create the promotion gets updated in the promotion calendars and sales orders for that account. Data that is copied includes:

- The **Account Type** and **Planning Account**
- **Involved Parties** and **Excluded Parties**
- Promotion **Products**, **Product Category** and **Product Group** along with the effective start and end dates
- **Attachments**

Note

The **Copy** feature is not available in the offline mode.

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### 3.10 Marketing

You can now migrate your campaign data using the Data Workbench tool. There are also a plenty of performance improvements and UI specific enhancements for the marketing objects.

#### Campaign Migration using Data Workbench

You can now migrate the campaign root, notes, and attachments using the Data Workbench tool. The import objects are **Campaign - campaignmigration** (root), **CampaignNotes - campaignmigration** (notes) and **Attachments - campaignmigration**. You will follow three main steps to migrate campaign data:

1. Download the business object (BO) service node by node and upload the same after entering the data.
2. Review the mapping and upload code value mapping if applicable.
3. Import attachments.

![Import Screen](image)

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3.11 Buying Center

Buying center enhancements include attitude indicators, role views, and the ability to review contacts who are not connected in the buying center relationship tree.

Contacts Without Buying Center Relationships are Listed in the Side Bar

Contacts involved with an account or opportunity that don’t connect to other contact relationships in the Buying Center’s relationship tree, now display on the side bar of the Buying Center.

Role View in Opportunity Buying Center

In an opportunity’s Buying Center, you can now use the Role Only button to display contacts by role. A contact’s role is defined in Opportunity ➔ Contact.
Attitude Indicator in Buying Center

To further identify and predict successful sales strategies, you can use the *Perception of Company* field in the *Contact* tab and the *Attitude Towards Opportunity* field in the *Opportunity* tab to maintain that contact’s impression of an opportunity or company. Based on the selections within these fields, an indicator signaling the contact’s attitude toward the opportunity or the company display in the buying center’s graphical view. The three types of indicators are as follows: Red means not favorable, orange means neutral, and green indicates a positive attitude.

Buying Center Enabled in the Data Workbench

You can now create and maintain *Buying Center* relationships for your opportunities using the *Data Workbench*.

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4 Service

You’ll find plenty of exciting enhancements for Service in this release: An improved call center user experience, support for embedded soft phone widgets in the Fiori client, new Activities tab for tickets, the ability to assign multiple demands and also be able to group them based on certain parameters, and many new API-related features.

**Tip**
Click a topic title for more details about that feature.

- **Tickets** [page 58]
  You’ll notice many enhancements to tickets including: General availability of the new e-mail response management, improved attachment handling in the Fiori client, sales area determination options, and automatic ticket category assignment.

- **Computer Telephony Integration** [page 63]
  New call center agent experience in the Fiori client, and click to call from ticket detail view in the HTML5 client.

- **Registered Products** [page 64]
  The Attributes tab for a registered product has been made available to you in the offline mode. Additionally, we’ve enhanced workflow rules based on warranty expiry, and availability of OData service for the installed base header section.

- **Installed Base** [page 65]
  This release offers you the ability to move a registered product using existing registered products.

- **Resource Scheduler** [page 66]
  For this release, we’ve provided you with the ability to group assignments, additional working hours type, assign multiple demands, and utilize temporary org assignment for scheduling. After grouping, the planner can move the group to another technician or change the starting time. The planner now has better visualization, as at a glance, the group indicates if there is work to be done by a technician at the same customer. This makes further planning efficient. You can also set up and maintain skills for your employees, registered products, and customers in the new Skills tab.

- **Maintenance Plans** [page 69]
  For time based maintenance plans, maintaining measurement attributes in Plan Definition is now optional. The new start date field in the Maintenance Items tab allows you to set a value for first time ticket generation.

- **Time Recording** [page 71]
  We’ve enabled Time Entry sorting that will sort all time recordings by date and time. It is also now possible to integrate with SAP ERP for CATS time entry in the system.

- **Service Contracts** [page 72]
  In this release, some of the significant service contract features include access restriction, extension fields, and message form enhancements.

- **Service Levels** [page 76]
  The menu path to access the service level determination rules has changed.
Analytics for Service [page 77]
New features for service analytics include a data source for multiple registered products and the option to include the service technician in the ticket history report.

4.1 Tickets

You’ll notice many enhancements to tickets including: General availability of the new e-mail response management, improved attachment handling in the Fiori client, sales area determination options, and automatic ticket category assignment.

Consolidated View of Attachments

You can view all attachments in the Attachments tab: files uploaded directly to the ticket, and those sent via e-mail (attached to both inbound and outbound messages).

Ticket Description

You can edit the ticket description field with the ticket in any status. In the November, 2016 release you could only edit the ticket description when the ticket was in status: Open.
Parts Availability Check for Work Tickets

You can check if repair parts are available to promise (ATP) with an action on the ticket header. Check the ATP tab in ticket items to see the availability date, and quantity available.

Your administrator can enable the ATP check in settings. There is a new Attribute for document types - ATP Relevant. Select this checkbox for desired document types such as Service Requests and Work Tickets. Once you configure the document types, you also need to designate which item processing codes are ATP check relevant. You can find item processing codes under Business Configuration ➤ Implementation Projects ➤ Fine Tuning.

Sales Area Defaulting

When this option is selected in Business Configuration, the sales area associated with a ticket is defaulted based on the following logic:

1. Intersection of account sales data and employee sales data
   1. Compare match of sales organization and distribution channel and division
   2. Compare match of sales organization and distribution channel
   3. Compare match of sales organization
2. User's employee sales data
3. Intersection of account sales data and sales organization of employee - compare to sales organization only
4. Account sales data only
5. Sales organization of employee

Sales Area Determination Based on Serial ID

When your administrator selects this option in Business Configuration, the sales area associated with a ticket is assigned based on the serial ID of the product associated with the ticket.

Extension Scenario From Installation Point to Ticket

If your administrator adds an extension field to the installation point header, the extension field also appears in the header area of associated tickets.

Multiple Registered Products in Ticket Summary Report

The ticket summary report includes all registered products associated with a ticket.
E-Mail Response Management for Fiori Client (General Availability)

A new E-mails tab replaces the E-Mail Reply action. Enhanced e-mail response interface now available in the Fiori client for all customers. The e-mail response editor now supports HTML formatting tags, and attachments to outgoing responses.

⚠️ Restriction

E-mail response templates and inline images in e-mail responses are not available yet, but will be included in a future release.

---

E-Mail Attachment Support in Fiori Client

Attachments show below the e-mail message content with an indicator of the total number of attachments. If more than five attachments are present, you can view additional attachments in a list. You can add attachments to e-mail responses from the ticket attachment list or from local storage.
New Activities Tab in Fiori Client Includes Tasks and Phone Calls

The tab previously labeled *Tasks* is now labeled *Activities* and includes both tasks and phone calls.

High Resolution Image Attachments for Facebook Posts

Images included in posts and direct messages now open in a new window at full size. All image formats supported by Facebook are available.

**Restriction**

To view images included with direct messages, you must have access to the Facebook account that received the direct message.

Automatic Ticket Categorization with Machine Learning (Co-Innovation Customers Only)

Your system can be configured to analyze your ticket categorization patterns and automatically assign tickets to categories.

Create New Customer or Contact from Value Help in Service Ticket

You can now create a new customer (account or individual customer) or a contact directly from the create ticket screen, in case a customer or contact does not exist. This is available under actions provided on the value help pop-ups for customer and contact. Clicking on these actions launches the create for corresponding objects.
Parent topic: Service [page 57]

Related Information

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4.2 Computer Telephony Integration

New call center agent experience in the Fiori client, and click to call from ticket detail view in the HTML5 client.

Computer Telephony Integration in Fiori Client Available for All Customers

⏰ Redesigned user experience in the Fiori interface to create a seamless flow - from receiving an incoming call alert, to caller look-up and recognition, through call notes and follow-up documents - is out of beta and ready for all customers.

⚠️ Restriction
- The Live Activity Center floor plan cannot be adapted by your administrator yet
- Incoming phone calls cannot be linked to existing tickets yet

Embed Softphone Widgets in Fiori Interface

✔️ You can now work with your system integrator to embed softphone control widgets within the Fiori interface, eliminating the need for a local CTI adapter and an external telephony client. The existing telephony integration solution is still fully supported.

⚠️ Restriction
Embedding a soft phone widget in the user interface requires work by a system integrator.

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Related Information

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4.3 Registered Products

The Attributes tab for a registered product has been made available to you in the offline mode. Additionally, we’ve enhanced workflow rules based on warranty expiry, and availability of OData service for the installed base header section.

Offline Availability of Registered Products

Registered Products attributes are enabled and can be accessed in offline mode.

Workflow Enhancement

Warranty End Date and Warranty ID fields are enabled for registered products/installation points to create workflow rules based on warranty expiry.

Assign skills in Registered Product

You can assign skills for registered products in the Registered Product work center. You can also assign skills to employees, customers, and products. Refer to Skills Management in Resource Schedule [page 66] for more information.

Territory fields in Registered Product List and Advanced Search

Territory fields are now available on the registered products list in the query. User can search for registered products based on territory.
OData Service and Data Workbench Availability

OData service is now available for Installed Base header section, Measurement Logs, and Measurement Readings.

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Related Information

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4.4 Installed Base

This release offers you the ability to move a registered product using existing registered products.

The new Add Existing Registered Product feature in Installed Base displays all registered products. Choosing a registered product, which is already assigned to another installed base will move the registered product.

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Related Information

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4.5 Resource Scheduler

For this release, we’ve provided you with the ability to group assignments, additional working hours type, assign multiple demands, and utilize temporary org assignment for scheduling. After grouping, the planner can move the group to another technician or change the starting time. The planner now has better visualization, as at a glance, the group indicates if there is work to be done by a technician at the same customer. This makes further planning efficient. You can also set up and maintain skills for your employees, registered products, and customers in the new Skills tab.

Employee Work Hours Type

Besides regular working hours, you can additionally maintain On Duty and Overtime hours for an employee. Color coding these new working hour types will help you identify each type on the Gantt chart. You can drag and drop demands to these additional work hour slots as well.

1. Navigate to People > Employee > Working Hours tab.
2. Next, select Add Row and maintain working period (on duty/overtime) the valid from and to dates, time zone, and work day calendar.
3. Maintain working days and working hours in the lower section of the screen. Once maintained here, you will be able to see the updates in the Resource Scheduler Gantt chart.

Fine Tune Work Hours Type

In the Fine Tune Activity list, search for Demand Processing > Maintain Working Hours Type. Define and maintain work hours type and assign colors to each type to display in the resource scheduler Gantt chart.
Enabling Group Assignments

To use the Group Assignments feature, select the related question by navigating to: Scoping ➔ General Business Data ➔ Resource Scheduler ➔ In the Questions tab, select: Do you want to enable Grouping for C4C Resource Scheduler?

Grouping Assignments

Once grouping of demands/assignments is enabled in the system you can group multiple demands for better visualization, and also work on the group as a whole. You can group assignments for each technician that have been scheduled for the same day, and have the same customer, ticket type, and location.

When you select Group Mode, all relevant demands get clubbed together and appear as one on the Gantt chart. Clicking on Normal Mode takes you back to displaying the demands separately.

On the Gantt chart, the group displays as a static background color. On selecting a group, the list of all assignments in that group gets displayed in the details area below. After grouping, the planner can move the group to another technician or change the starting time. The planner has better visualization, as at a glance, the group indicates that there is work to be done by a technician at the same customer site. With this functionality, further planning can be made more efficient.

You can move a group based on certain conditions such as: status of assignments in the group, employee working hours etc.

Temporary Team Assignment in Gantt Chart

When an employee is assigned to a team temporarily, the employee gets displayed in the Gantt chart for that team’s planning (for the duration of the temporary assignment).
Planning Multiple Demands

You can now assign multiple demands at once.

1. Choose multiple demands in the demands list and double-click on a cell in the Gantt chart.
2. Assignments are created for the selected demands in an order.
3. If a demand does not fit within the available work hours for that day, the entire demand is returned back to the demand list.

Note

In week view, assignments are added from start time of working hours.

Skills Management

The administrator can create skills in the new Skills tab. You also have the ability to create skill groups, skill sub-groups, and skills in a hierarchy. However, you have to first enable this feature in scoping to avail this functionality.

- You may assign skills to employees, customers, registered products, and products.
- You can define skill validity for employees.
- You have the option to identify a skill as mandatory for customer/registered product/product.

Enable Skills Management

Navigate to scoping  General Business Data  Skills Management and select to enable the feature in the system.

Other Enhancements

These are some of the enhancements for Resource Scheduler:

- Edit Assignment Action
  Assignment Start Date/Time can be edited using Edit Assignment action.

- Additional Fields in Demand List and Demand Search
  Fields such as Ticket Type, Ticket Priority, City, Requested Start/End Date, and Item Status are added in the demand list table and advanced search.
• Additional Fields in Demand and Assignment Details Area
  Fields such as Ticket Description, Ticket - Item ID, Item Status, Location, Assignments Created, and Preferred Technician have been added in the Demand details section. Some of these fields are also added to Assignment details section.

• Assignment Buffering
  Unsaved assignments are not lost when moving to different views in the Gantt chart.

• Additional Fields in Demand List and DemandAssignments Tab Available on Ticket Details Screen in Offline Mode
  The Assignments tab is enabled from the Ticket details screen.

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4.6 Maintenance Plans

For time based maintenance plans, maintaining measurement attributes in Plan Definition is now optional. The new start date field in the Maintenance Items tab allows you to set a value for first time ticket generation.

Time Based Maintenance Plan Enhancements

The following are few enhancements we’ve made for time based maintenance plans:

• Measurement Attribute is Optional
  It is not mandatory to maintain a measurement attribute in the Plan Definition tab. You have the option to use the measurement log maintained in registered product. However, if selected, then it’ll work as before. For time based plan the logic to determine the first service ticket generation has been enhanced. The new Start Date field can be set for a Maintained Object which is considered for first time ticket generation. If no
start date is maintained here, the existing logic will be used (Valid From/Reference Date of Registered Product is considered).

- **Start Date field for Maintained Objects**
  For time based plan the logic to determine the first service ticket generation has been enhanced. The new Start Date field can be set for a Maintained Object which is considered for first time ticket generation. If no start date is maintained here, the existing logic will be used (Valid From/Reference Date of Registered Product is considered). Existing plans are not impacted. So the tickets would be generated based on the parameters defined in plan definition for that maintenance plan.

If you choose to Trigger Manual Run, then the Start Date field gets disabled, as the manual run action overwrites the start date value. Start date can be edited until the first ticket has been created for it.

- **Note**
  Existing plans are not impacted.

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4.7 Time Recording

We’ve enabled Time Entry sorting that will sort all time recordings by date and time. It is also now possible to integrate with SAP ERP for CATS time entry in the system.

Time Entries Sorting

Sorting is now enabled on Time Recording tab. All time reports are now sorted by Start Date. All time entries are first sorted by date and then start time in Time Recording work center.

Integration with SAP ERP CATS

You can release approved time entries to CATS in SAP ERP. For this integration, you need to maintain mapping between time types of the time entries in our system and Activity and Type in SAP ERP.

Note

Time entries, with reference to tickets, can be released only if the corresponding ticket has already been released to SAP ERP.

Offline Enhancements for Time Entries

These are some offline enhancements for Time Entries:
When you create time entry, you can see these fields by default: Time Zone, Date, Status, and Employee.

Duration is calculated when start and end times are added for time entries.

Parent topic: Service [page 57]

Related Information

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4.8 Service Contracts

In this release, some of the significant service contract features include access restriction, extension fields, and message form enhancements.

Multi-Select/Deselect Availability in Contract Covered Objects

When working with covered objects in a contract, you can now select or deselect all covered objects using the multi-select function.
Customer Extensions on Item Level

You can now cluster extension fields on product item level in a separate section below the product table using adaption.

Assignment of Service Technicians to an Account Team

The query *All Contracts* displays the contracts for which the logged-in user has access to either because they were:

- assigned as involved party to the contract account and/or
- were directly assigned as involved party to a contract.

Contract Extension Field Visibility

New *Extension Scenarios* are available in screen adaptation that are also available on the ticket header as well as the ticket item.

You can add the extension scenarios from the ticket header or ticket item by navigating to *Adapt* > *Edit Master Layout* > *Extension Field* > *Change Properties* > *Field Definition* > *Extension Scenarios*.

Additional Contract Header/Item Pricing fields in Form Message Types

This release has new fields which allow you to enhance message type forms including:

- Enhance Message Type (Forms) by Pricing (Item)
- Enhance Message Type (Forms) by Pricing (Header)

- **Note**

  Only the pricing data which has been flagged as relevant for printing in SAP ERP condition type will be available.
Additional Involved Party Data on Header Level

On the header level of contract forms, you can add now *Contracting Unit* and *Sales Employee* as party or any custom defined Z party using *Other Party*. 
Access Restriction Rules Update for Contracts

With an update in restriction rules for contracts, an administrator can grant or restrict authorization access using restriction rule **06 for Access Context 2020 (Employee, Accounts (Account Team))**. This allows for example, a technician access to contract details.

If this restriction rule was set, the technician has as member of related account team (as of the February 2017 release), access to all the contracts of this account. This means it is not necessary for the service technician to be listed as an involved party in each contract.

**Note**

The maximum number of accounts one has access to with the restriction rule is limited to 500 accounts.

**Parent topic:** Service [page 57]
4.9 Service Levels

The menu path to access the service level determination rules has changed.

Access the service level determination rules table from Administrator ➤ Service and Social ➤ SLA Setup ➤ Determine Service Level.

Note

The Determine Service Level link formerly appeared in the Common Tasks section of the Administrator menu.

Parent topic: Service [page 57]
4.10 Analytics for Service

New features for service analytics include a data source for multiple registered products and the option to include the service technician in the ticket history report.

Data Source for Multiple Registered Products

A data source is available for multiple registered products associated with a ticket.

Service Technician Enabled for Ticket History Reporting

You can now include the service technician information in ticket history reports.

Parent topic: Service [page 57]

Related Information

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5 User Interface

The User Interface is now easier to use with lesser clicks, better visuals, and multiple browser options. Read on below for all the new features and enhancements.

Tip
Click on the hyperlinks to find detailed information for each of the topic areas.

General UI Enhancements [page 78]
These features are common to all users that are using Desktop, the extended edition, or HTML5. There are a few new tasks that your administrator can perform. Read on for more details.

Fiori Client Enhancements [page 81]
Read on for new and enhanced features that include one click access to various CEC Hybris apps, direct link to idea place, opening address links in map apps, enhancements in rich text field, and in recent history and other changes that make working with the solution intuitive.

HTML5 Enhancements [page 86]
There are a few updates that are relevant for the HTML5 client only. You can access three new work centers, and you have enhancements to existing workcenters. Read on for more information.

5.1 General UI Enhancements

These features are common to all users that are using Desktop, the extended edition, or HTML5. There are a few new tasks that your administrator can perform. Read on for more details.

Additional Language Support

The user interface is available in two new languages: Romanian and Croatian.

Model Validations

As an administrator, you can define validations to generate custom messages. These can be of Error, Warning, and Information message types. You must define the rule conditions based on the available fields in the UI model.

To define the validation follow the steps below:
1. Hover over a field and select the validation icon. The system opens the Validations window.
2. Click New to open the Validation Editor screen.
3. In the Overview tab, enter a validation name, description, and type of error.
4. In the Editor tab, enter a rule name, and a condition based on available fields and functions.
5. In the Messages tab, enter the custom message.
6. Click Apply.

The rule is then applied on the Master Layout and it works in both online and offline mode.

**Hide Queries in Object List Using Page Layouts**

As an administrator you can create separate query lists for page layouts in object lists (OWL) by hiding certain queries. This gives you the flexibility to maintain different query sets for different roles. However, you cannot define different default query in different page layout. Note that the default query set in master layout cannot be hidden.

**Rule List**

A new option called Rule List is added in the Administration work center under Adaptation Changes. This lists the property rules and validation rules in the tenant.

**Object and Field Specific List for Administration Changes**

To help administrators further track the changes they have made, a new Change Log is now available in the field/individual control and object level. They can then delete any unwanted changes if necessary. The list contains the details of changes such as, user, type of adaptation change, time stamp, and so on.
Sorting on Text Field

⚠️ For all extension fields of type **text** or **note**, you can no longer perform sorting. For all standard field, if the data type of field is **text** or **note** with **unlimited characters**, only then you cannot perform sorting.

However, the filter option is still available for both.

Code List Restrictions for Multivalued List

⚠️ You can now maintain Code List Restrictions for Multivalued List.

This works in both online and offline mode.

Company Settings Enhancements

- 📝 A new tab called **Signature** is available now. This allows you to save the URLs of your preferred CEC Hybris products. When you open your extended edition UI, you will have a shortcut to the saved URLs.

- 📝 A new option is available that allows you to disable the annotation feature in Fiori client.

Add PSM fields for OVS and Quick Create(BETA)

⚠️ As an administrator, you can add Public Solution Model (PSM) enabled fields to the user interface using the **Other Fields** tab. This is a beta feature for this release, and is only supported on floor plans like Quick Create and
Object Value Select. Currently fields within an object that have 1:1 relation with the parent object can only be added. The list of datatypes supported are string, lists, boolean, date/date-time, integer/numeric.

**Parent topic:** User Interface [page 78]

**Related Information**

Fiori Client Enhancements [page 81]
HTML5 Enhancements [page 86]

### 5.2 Fiori Client Enhancements

Read on for new and enhanced features that include one click access to various CEC Hybris apps, direct link to idea place, opening address links in map apps, enhancements in rich text field, and in recent history and other changes that make working with the solution intuitive.

**One-Click Access to Various CEC Hybris Apps**

You can launch and navigate to different SAP Hybris applications in a new browser from within the solution by clicking on the signature menu. This menu is launched by clicking on the icon in the top left corner. Up to 5 SAP Hybris applications can currently be configured.
As an administrator, to enable Signature you need to go to Adapt > Company Settings > Signature tab and add the SAP Hybris application urls you want to use or need to go to.

Address Link Navigation to Maps

Click-to-navigate has been enabled for address fields. So, clicking on the address fields launches the native map application on tablets and smart phones. On the browser, the address is shown using Google maps on a separate browser window.

⚠️ Restriction
Currently, not all address links are enabled for this feature.
A link to SAP Hybris Cloud for Customer Idea Place page has been added under the user menu. By clicking on this link, you can share your ideas on ways to enhance the product functionality. This link launches in a separate window and is supported on desktop and tablets, and in online mode only.
System Remembers the Last Performed Save Action on Create

The system remembers the choice of save action selected by you when you create an object on a specific device. For example, in the account creation screen, the default selection is Save. Now, if you select the save option as Save and Open during account creation, then the next time the you create an account (on the same device) you will see Save and Open as the default selection.
Rich Text Field Enhancements

Rich Text fields have been enhanced to hide the rich text controls during display mode. These controls are shown only during the field edit mode. For desktop browsers, editing such fields can be done in the field box. For the Extended edition App on tablets and smart phones, editing is done on a full screen pop-up.

Parent topic: User Interface [page 78]

Related Information

General UI Enhancements [page 78]
5.3 HTML5 Enhancements

There are a few updates that are relevant for the HTML5 client only. You can access three new work centers, and you have enhancements to existing workcenters. Read on for more information.

New Workcenters

You can access the following workcenters in HTML5 now:

- Business Configuration
- Administrator
- Data Privacy Management

Note

In the Administrator workcenter the following subviews are not yet available. You can access them only from the Silverlight UI.

Table 3:

<table>
<thead>
<tr>
<th>Work Center View</th>
<th>Work Center Sub View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Input and Output Management</td>
<td>Form template selection (FDT)</td>
</tr>
<tr>
<td>Input and Output Management</td>
<td>Output channel selection (FDT)</td>
</tr>
<tr>
<td>Business Flexibility</td>
<td>Form template Maintenance</td>
</tr>
<tr>
<td>Business Flexibility</td>
<td>Mashup Authoring</td>
</tr>
<tr>
<td>Business Flexibility</td>
<td>Mashup Web services</td>
</tr>
</tbody>
</table>

Recent History Feature Enhancement

Under Recent History now the following additional business objects are supported - Visits, Installed Base, and Contracts.

Parent topic: User Interface [page 78]
Related Information

General UI Enhancements [page 78]
Fiori Client Enhancements [page 81]
6 Extended Edition Apps and Offline

Extended Edition is now richer with plenty of functional enhancements that includes native calendar integration, address link navigation to maps and enhancements to annotation, offline pdf generation, and smartphones. Read on for the interesting updates.

Address Link Navigation to Maps

When you click an address link it launches the native map application of the device. Then, you can navigate to the address in the map and get relevant direction information. This is supported in iOS, Android and Windows.

⚠️ Restriction

Currently, not all address links are enabled for this feature.
Native Calendar Integration (iOS)

SAP Hybris Cloud for Customer, extended edition can be integrated with the iOS calendar. So, you can see all the native calendar events in the application calendar, along with application events. This provides total visibility into all your events and prepares you well. You can differentiate the native calendar events with the device icon visible under the events. You can only view the native calendar events and not open them in the solution.

You can enable this feature under Settings by turning on the toggle switch for Calendar Integration under Advanced setting.

Note
The very first time when you open the calendar after enabling this new feature, you will get a pop-up asking you to allow the app to access the iOS calendar.
Managed App Configuration [iOS]

When using external Mobile Device Management (MDM) tools, you have the option to set certain configuration keys and values in the MDM provider’s management console through which they will be pushed to the app.

Prerequisite: The MDM solution supports Managed Configuration [link to Apple developer library]

Different configuration logon profile setup options are:

- Preset a default system URL if this URL is provided by the MDM tool and the field value is not empty.
- Preset the user name if the field is provided by the MDM tool and field value is not empty.
- Preset the remember password option if the field is set to YES by the MDM tool.

You have to navigate to the new logon profile screen manually. When the screen opens, the default values are applied. Default values will not be applied for consecutive openings of the new logon profile screen. Currently the ManagedAppConfig.plist has the following example entries:

<table>
<thead>
<tr>
<th>Key</th>
<th>Type</th>
<th>Value as place holder</th>
</tr>
</thead>
<tbody>
<tr>
<td>systemurl</td>
<td>String</td>
<td><a href="http://my000000.crm.ondemand.com">http://my000000.crm.ondemand.com</a></td>
</tr>
<tr>
<td>username</td>
<td>String</td>
<td>mobilityUserAlias</td>
</tr>
<tr>
<td>rememberpassword</td>
<td>Boolean</td>
<td>YES</td>
</tr>
</tbody>
</table>

Enhanced Web Content Experience (iOS)

Links to the web content in the app can leverage the improved iOS capabilities. For example, if you are already logged into a website in safari, and you tap on the same website link in the app, then the safari window comes up and you are logged in automatically. Or, if you are not logged in, then you will need to log in.
Unlock Objects After Login

If you are editing an object and the application quits unexpectedly, then the object gets locked by your user name on the server. Then, when the next time you log into the application, the object is unlocked automatically.

Enhancements in Annotations

The following enhancements have been made in annotations this release:

- When you use the drawing tools to annotate, you have the option to delete any drawing tool you don’t need. This is supported in all the devices (iOS, Android and Windows).

Note

Annotation on Windows is supported only for Windows 10 Tablet and Windows Phone and not on Windows 8.1 and IE.
In online mode, Save as Image action for annotations is supported on all browsers (Chrome, IE and Safari).

Option to Disable Annotations

By default, all business users can use the annotation feature. However, if you don’t want to use annotations, you have the option to get it disabled by your administrator.

As an administrator, to disable annotations, you need to go to Adapt Company Settings and then select the check box Disable Annotation in Fiori Client. Then, choose Save and Close to see the change.

Option to Get the Offline Data Cleared After Set Time Period

The administrator can set a duration under settings for you to delete offline data after a defined time period. You will need to log in online and synchronize data at least once to avoid losing the data. If you forget to synchronize, you will be prompted about data deletion with a message, when you launch the app.

Mandatory Online Login Required After a Set Time Period to Work in Offline Mode

You are required to login online at least once before you can login to the app in offline mode. This time period is set by the administrator. You are reminded by a pop-up message to login online before you can continue to work in offline mode and the app switches to the online login page.

Sync Based on Personalized Queries

User personalized queries can be used for sync. The Offline Sync Setup now shows separate tabs for queries configured by the administrator (Default Queries) and personalized queries created by you (My Saved Queries). You can choose to sync with any combination of these queries. Query selections are remembered in subsequent sync runs. However, deselecting a query for sync will delete the data related to that query in the next sync.
Extended Edition Apps Restriction

⚠️ Restriction

For a better performance experience, number of open tabs is restricted to 6 in the extended edition apps and an information message is shown when this limit is reached. However, you can still open additional objects after closing some of the open tabs, so that the tab count does not exceed 6.
Sync Favorites

 Administrators can define queries that will narrow down the objects marked as favorites by the users. This feature is available for selected objects only. Individual Favorite queries can be added for each object/role under Administrator Offline Settings.
Enhanced User Experience for Sync

The Sync History has been enhanced to show information about the Last Sync Log. In addition,

- Detailed information about the sync is also displayed in the Last Sync Log (time taken, info/warning/error message details).
- In case of upload errors, you can navigate directly from this screen to the Upload Sync Log screen to view the last upload details.
Visual Indicator Available for Changes and Errors

Visual indicators have been introduced in offline mode for detail and list views:

- Objects that are edited/created offline and have not yet been synchronized show a yellow indicator.
- Objects that have been synchronized and have upload errors show a red indicator. Additionally, you can check the Upload Sync Log under Offline Settings to view the errors and resolve them.
Enhancements in Attachment Handling

You can now mark attachments for download while you are in offline mode.

- If you have internet connectivity, the attachment will be downloaded immediately.
- If you do not have internet connectivity, the attachment will be marked for download and will be available in offline mode the next time you synchronize.
Windows 10 Mobile Support (Online Only)

The extended edition app is available for Windows 10 smartphone and is supported in online mode only. The Window’s device supported is Microsoft Lumira 950XL.
7 Analytics

You will find a comprehensive list of general and Fiori Client enhancements for Analytics. Find a brief description of these features in this document.

👉 Tip
Click on the hyperlinks to find detailed information for each of the topic areas.

General Enhancements [page 99]
In this release, there are several new and enhanced features for Analytics. Read on for more information.

Fiori Client Enhancements [page 101]
Read on for new and enhanced features available in the Fiori Client that enrich our Analytics functionality. These include dashboard interaction, filters in report list, data visualization in chart and table mode and so on.

7.1 General Enhancements

In this release, there are several new and enhanced features for Analytics. Read on for more information.

New Relative Select Option

🔍 A new relative select option called Next 180 Days is available in the system. When you choose this option, the system calculates the next 180 days from the date of execution.

Download as PDF and XLSX

🔍 You can download a report in PDF or Microsoft Excel® in XLSX (.xlsx) format.

ℹ Note
- Due to browser limitations, download to PDF is only available in Chrome browser.
- Download to PDF is only available for charts. You cannot download a tabular report in the PDF format.
Deletion Support in SAP NetWeaver BW Integration with ODP

A new data source called Deleted Data (ODP Integration) is available which contains all the deleted records that is needed for cleanup of obsolete data in the SAP NetWeaver BW data sources. Available for use in ODP Integration only. Note that the data sources of type Join, Virtual, and Cloud are not supported either directly or as an underlying member.

Override Selections in Analytical ODATA Service

You can now pass OData selections that override the respective existing values in the initial selection of the report. The remaining selections, if any, would still apply.

Parent topic: Analytics [page 99]

Related Information

Fiori Client Enhancements [page 101]
Fiori Client Enhancements [page 101]
7.2 Fiori Client Enhancements

Read on for new and enhanced features available in the Fiori Client that enrich our Analytics functionality. These include dashboard interaction, filters in report list, data visualization in chart and table mode and so on.

Flags and Favourites as Filters

You can filter your reports using Flags and Favourites. For example, if you filter a report list by Flagged Items, the system displays a list of all the reports that you flagged earlier.

Dashboard Interaction

Dashboard interaction is now available in Fiori Client. You can pass multiple filters using ctrl+click. You can view and clear filters by clicking on the filter icon.

Display Values in Tiles and KPI Overview

The following enhancements are made in the KPI Overview:

- An error message is displayed when multiple currencies or units are used and aggregation is not possible
- Scaling is now obsolete. The following standard formatting rule is used:
- Values are displayed as complete numbers as long as they are less than or equal to 9999
- All the values are rounded up to two decimal places
- Values above 10000 are displayed along with unit symbols, such as, K, M, B and so on

**KPI Overview in Smartphones**

KPI Overview is enhanced in smartphones. You can now scroll to collapse the ribbon and view the report details.
Toolbar Options

There are a few new toolbar options that will make your experience better:

- **Chart Options**: All the actions related to charts are grouped together and is visible on the left side of the toolbar separator. The buttons are highlighted when the action is enabled.

- **Show Values in Chart**: A new button is available that allows you to show values in Chart.

- **Chart and Table Display Mode**: You can visualize data as both chart and table in the same view. Under the More Actions icon, a new option is available that allows you to switch between a single view and a dual chart and table view.

- **Show Chart and Table Settings**: A new action button is available that enables you to show or hide the chart and table settings pane. The system displays the chart settings, or the table settings, or both, depending on the visualization context.

**Chart Settings**

The following chart settings are available that helps you to manage your chart visualization:

- Display Legend
- Display Chart Values
- Show My Axis Description
- Show Results and Overall Results If Displayed in Table
- Show Hierarchies If Displayed in Table
Table Settings

The following table settings are available that helps you to manage your table visualization:

- Freeze Characteristics in Rows
- Table Design
- Grid Lines
- Show Result Row As
- Show Result Column As
- Display Repeated Texts
- Arrange as Hierarchy
- Limit Data
Launch Reports in Fiori Client

A new option called Web Browser - Extended Edition UI is available in the Business Analytics workcenter under Design Reports Edit With that allows you to launch reports in Fiori Client.

Your administrator can use this feature to save views in the extended edition visualizations.

Parent topic: Analytics [page 99]

Related Information

General Enhancements [page 99]
General Enhancements [page 99]
8 Add-Ins

Tip
Click on the hyperlinks to find detailed information for each of the topic areas.

SAP Hybris Cloud for Customer Add-In for Microsoft Outlook [page 106]
There are a few improvements in this release that should save you some time when you are working right from your inbox.

SAP Hybris Cloud for Customer, server-side integration for Microsoft Outlook [page 110]
With SAP Hybris Cloud for Customer, server-side integration for Microsoft Outlook, you can engage with more customers and close deals faster.

8.1 SAP Hybris Cloud for Customer Add-In for Microsoft Outlook

There are a few improvements in this release that should save you some time when you are working right from your inbox.

Associate E-Mails with Activities or Sales Orders

In your Microsoft Outlook inbox, you can drag-and-drop e-mails onto activities or sales orders, which associates the e-mail with the activity or sales order in SAP Hybris Cloud for Customer.
Sales Order Information

When you receive an e-mail in your inbox, if there is a sales order associated with the account that the system matches to that e-mail, the information for that sales order appears in the side panel.

Filter by Individual Customers or Accounts

In Microsoft Outlook, when you add an e-mail with reference to an account, you can filter the search results by type (account or individual customer). Your filter settings persist until you change them.
Prevent Synchronization of E-Mail Marked as Private or Confidential

Your administrator can set up your system to exclude e-mail marked as either private or e-mail marked as confidential from being synchronized to SAP Hybris Cloud for Customer.

To make the setting, log on as an administrator and go to Administrator > General Settings > Groupware Add-In Settings > Microsoft Outlook > General Settings > Sync Settings and choose whether you want to exclude confidential e-mail, private e-mail, or both from synchronization.

Prevent Synchronization of Notes and Attachments for Visits and Appointments

Your administrator can set up your system to prevent notes and attachments from being synchronized to and from SAP Hybris Cloud for Customer for appointments and visits.

Note

These settings always affect both appointments and visits. For example, it is not possible to prevent synchronization for appointments and not for visits.

To make the setting, log on as an administrator and in the user role, add the appropriate business action restriction:

- To prevent synchronization of attachments for appointments and visits (GW_APPT_ATTACH_UPLOAD_DOWNLOAD)
- To prevent synchronization of notes for appointments and visits (GW_APPT_NOTES_UPLOAD_DOWNLOAD)
Microsoft Outlook 2007 Is No Longer Supported

As of February 2017, Microsoft Outlook 2007 is no longer supported. We recommend upgrading your Microsoft Outlook to one of the supported versions. You can find a list of supported versions in the system and software requirements.

Remote Installation of Add-In with MSI File

In addition to each end user being able to install the add-in manually, administrators can use an MSI file to install the add-in on multiple clients remotely. As an administrator, you can download the MSI file from the SAP Software Download Center at https://support.sap.com/software/installations.html.

Parent topic: Add-Ins [page 106]

Related Information

SAP Hybris Cloud for Customer, server-side integration for Microsoft Outlook [page 110]
8.2 SAP Hybris Cloud for Customer, server-side integration for Microsoft Outlook

With SAP Hybris Cloud for Customer, server-side integration for Microsoft Outlook, you can engage with more customers and close deals faster.

**Note**

SAP Hybris Cloud for Customer, server-side integration for Microsoft Outlook is available with SAP Hybris Sales Cloud, enterprise edition.

The current version supports Microsoft Office 365 and Microsoft Exchange 2013+.

The SAP Hybris Cloud for Customer, server-side integration for Microsoft Outlook synchronizes your information at server level, so installation at client level is not necessary. Like the existing client-side solution, the server-side integration powers your inbox with contextual insights from SAP Hybris Cloud for Customer and adds intelligent features that make your life easier. These features allow you to do the following:

- Be productive in any e-mail client including mobile and tablet. You can synchronize the following information from your SAP solution:
  - Contacts, accounts, and individual customers
  - Tasks
  - Appointments and visits
  - E-mails
- Work with SAP Hybris Cloud for Customer without leaving your inbox by doing the following:
  - Creating items in your SAP solution from your inbox.
  - Viewing data from your SAP solution in the context of an e-mail, appointment, or visit.
  - Searching for items in your SAP solution.

**Parent topic:** Add-Ins [page 106]

**Related Information**

SAP Hybris Cloud for Customer Add-In for Microsoft Outlook [page 106]
9 Industries

User experience enhancements in Utilities Contact Center are a delight to work with. You must read more on the (Beta) guided processes for most utilities functions, the (Beta) configurable object hierarchy and the other enhancements to understand these developments in detail. A notification regarding some of the de-scoped industry solutions is also documented in this section.

**Note**

Effective 1702, the scoping options are hidden for the following industry solutions in SAP Hybris Cloud for Customer – High Tech, Higher Education, Apparel and Footwear Solution and Retail. These solutions will not be offered to new customers. This development does not impact the ongoing support for existing customers.

**Tip**

Click on the hyperlinks to find detailed information for each of the topic areas.

Utilities Contact Center [page 111]

The Utilities Contact Center is now completely available in the responsive-UI based Extended Edition of SAP Hybris Cloud for Customer. Apart from this, there are many functional enhancements and some critical guided processes that are currently delivered as Beta features. Have a look at the amazing developments for the Utilities industry solution offering.

Banking Wealth Management Settings [page 115]

For wealth management in banking we’ve provided you with the option of adding new values for liabilities, client level, source, and identification types using the fine tuning activity in business configuration.

9.1 Utilities Contact Center

The Utilities Contact Center is now completely available in the responsive-UI based Extended Edition of SAP Hybris Cloud for Customer. Apart from this, there are many functional enhancements and some critical guided processes that are currently delivered as Beta features. Have a look at the amazing developments for the Utilities industry solution offering.

Default collapse view of the map in premise overview

The map view in the Overview screen for Premise is by default displayed in Collapse Map mode. Click on Expand Map to display the map view.
Point of Delivery for Service Ticket

In the Tickets screen under the Premise work center view, you can now use filter to select tickets related to premise or point of delivery.
Additionally, when creating a ticket, you can now select a point of delivery related to a premise. To do this, you can use the search help for the **POD External ID**.

**Note**

You will find two POD IDs when creating a new ticket from a premise. The premise that is displayed by default reflects an existing implementation where the search help for point of delivery or POD External ID is restricted to the Cloud for Customer system. A new implementation for the POD External ID is available in this release wherein an online search is performed in the ERP system to fetch values for POD External ID.

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### Enable Identification of Customer by Legacy Account

You can now migrate the legacy account number along with the other customer details. The legacy account number will also be displayed for the customer along with the new identification in the SAP Hybris Cloud for Customer system.

### Cancel move out to update the customer mailing address

A new action - **Cancel** now allows you to cancel the customer mailing address for a move-out. Therefore, after you have completed the move-out and refreshed the screen, you will no longer see the customer mailing address.
Move-In Date and Meter Reading Date in Sync

When you create a new move-in or transfer, you will now notice that the move-in (or move-out as applicable) date and the meter reading date are the same. If you change the move-in date, this correspondingly updates the meter reading date with the new date. However, when you estimate a meter reading (in move-in, move-out or transfer), you can change the meter reading date to a different date.

Extended Edition Support

The SAP Hybris Cloud for Customer for Utilities Contact Center for the extended edition is now enabled for all devices supported by SAP.

(Beta) - Configurable Object Hierarchy

In your SAP ERP-ISU system, you can now create a configurable hierarchy that you can use to display the utilities object structure in your cloud solution. Note that you can only have one active configurable object hierarchy.

(Beta) - Guided Processes

(Beta) Guided processes are now available for the following scenarios:

- Guided move-in
- Create business partner during guided move-in
- Create contract account during guided move-in
- Guided move-out
- Guided transfer
- Guided transfer process from premise TI
- Extensibility for guided process to be able to hide or unhide steps
- Dynamic Layout

Parent topic: Industries [page 111]

Related Information

Banking Wealth Management Settings [page 115]
9.2 Banking Wealth Management Settings

For wealth management in banking we’ve provided you with the option of adding new values for liabilities, client level, source, and identification types using the fine tuning activity in business configuration.

Fine Tune Wealth Management General Settings

Navigate to Business Configuration ➔ Open Activity List ➔ Fine Tune and select Banking Wealth Management General Settings. Maintain and edit data for each of the fine tuning activities:

- **Banking Liabilities Types**
  Create new and edit existing liability types (current and non-current) which the individual is responsible for.

- **Banking Client Level Type**
  Classify customers based on various levels (such as Gold, Silver, etc.) based on qualifying criteria, which may entitle them to additional benefits.

- **Banking KYC Source Type**
  Capture information on how a customer became a client. You can create new source types, or maintain description for the existing ones.

- **Banking KYC Identification Type**
  Capture and maintain different customer identifications.

**Note**

All new values must begin with ‘Z’. You have the ability to edit the description for all existing values.

Option to Add New Values for Various Wealth Management Types

You have the option of selecting the new values you’ve added via fine tuning from the following fields:

- **Liability Types**
  Navigate to Individual Customer ➔ Portfolio ➔ Net Liabilities ➔ Add Row ➔ In the Add Liabilities dialog box you now have the option of adding the new liability type.
● Client Level Types
Navigate to **Individual Customer** ➤ **Profile**, and then add the new Client Level type from the drop down list.

● Source Types
Navigate to **Individual Customer** ➤ **KYC**, and then add the new Source type from the drop down list.

● Identification Types
Navigate to **Individual Customer** ➤ **KYC**, and then add the new Identification Proof type from the drop down list.
Parent topic: Industries [page 111]

Related Information

Utilities Contact Center [page 111]
10 Integration

A high-level overview of all enhancements to the integration and infrastructure topic.

Tip
Click on the hyperlinks to find detailed information for each of the topic areas.

Integration with SAP ERP [page 118]
Integration with SAP S/4HANA [page 119]
Integration with SAP CRM [page 119]
Other Integration [page 120]

10.1 Integration with SAP ERP

Summary of integration related enhancements for SAP ERP:

- An ATP (Available to Promise) check in SAP ERP is now available for SAP Hybris Cloud for Customer Work Tickets
- SAP Hybris Cloud for Customer Time Reports are now replicated in SAP ERP CATS time sheet
- Item-level notes in Quotes and in Sales Orders are now replicated bi-directionally between SAP Hybris Cloud for Customer and SAP ERP
- Integration of Quotes are now bi-directional between SAP Hybris Cloud for Customer and SAP ERP
- Service Ticket integration to SAP ERP now transfers parent item IDs and parent ticket ID

Parent topic: Integration [page 118]

Related Information

Integration with SAP S/4HANA [page 119]
Integration with SAP CRM [page 119]
Other Integration [page 120]
Sales Quotes [page 31]
## 10.2 Integration with SAP S/4HANA

Summary of enhancements for SAP Hybris Cloud for Customer integration with SAP S/4HANA (version of S/4HANA shipped with S/4HANA Enterprise FPS 1 in October 2016):

- Replication from SAP S/4HANA Customer Hierarchy to SAP Hybris Cloud for Customer Account Hierarchy.
- Replication from SAP S/4HANA Pricing to SAP Hybris Cloud for Customer Offline Pricing
- Bidirectional replication between SAP S/4HANA and SAP Hybris Cloud for Customer Sales Order
- Attachment replication
  - Enhancements to attachment replication:
    - Replicated between SAP S/4HANA Quote/Sales Order and SAP Hybris Cloud for Customer Opportunity/Sales Quote/Sales Order.
    - Replication from SAP S/4HANA Material to SAP Hybris Cloud for Customer Product.
    - Replication from SAP Hybris Cloud for Customer Work Ticket to SAP S/4HANA Billing Request.

**Parent topic:** [Integration](page 118)

### Related Information

[Integration with SAP ERP](page 118)
[Integration with SAP CRM](page 119)
[Other Integration](page 120)

## 10.3 Integration with SAP CRM

Summary of SAP CRM integration related enhancements:

- External Pricing (net value) is now available for Opportunity in SAP Hybris Cloud for Customer from SAP CRM.
- Employees in SAP Hybris Cloud for Customer can now be assigned multiple organizations

**Parent topic:** [Integration](page 118)
10.4 Other Integration

Summary of enhancements for server based Groupware integration, Data Workbench and OData Services:

**Data Workbench Enhancements**

- New workcenter view *Templates* for key users to help map templates and template maintenance
- Import data in Initial Load mode to avoid Business Object validations
- Standard CSV delimiters are now supported for data import
- Task deletion is now available in *Monitor* view
- Template CSV, Field Definition and Code List Values files can now be downloaded in one ZIP file.

**Enhanced Service Categories OData APIs**

OData APIs for service categories allow you to query for catalog hierarchy information and use the entire catalog hierarchy on the client side.

*Note*

Use the field `d:ParentCategoryUUID` to query the object ID (GUID) of the immediate parent in the hierarchy.

Parent topic: Integration [page 118]

Related Information

Integration with SAP ERP [page 118]
Integration with SAP S/4HANA [page 119]
Integration with SAP CRM [page 119]
11 Starter Edition

SAP Digital CRM has been enhanced to include visits under Recent History in the HTML5 user interface.

Recent History Enhanced in HTML5 User Interface

In the HTML5 client, under Recent History you now have the option to see the recent history for visits. It displays your most recently browsed visits.
12  System and Software Requirements

Admin related work centers are now available in the HTML5 edition. These include the Administration, Business Configuration and Data Privacy work centers. In addition, you can now use the extended edition app using Windows 10. Read the detailed information on these enhancements.

Admin Specific Workcenters Available in HTML5 Edition

The workcenters Administration, Business Configuration and Data Privacy Management are now available in the HTML5 edition for SAP Hybris Cloud for Customer. Application users who have access rights to these workcenters can now access the same in the HTML5 edition.

Note

In the Administration work center, the configuration options listed here are not yet available in the HTML5 edition. You can continue to use the same using Silverlight interface.

- Mash-up Authoring
- Easy Form Editor
- Adobe LiveCycle Designer
- Output Channel Selection
- Form Template Selection
- Determine Service Level

Extended Edition Available for Windows 10

The extended edition app is now available for Windows 10, mobile edition on the Microsoft Lumia 950 XL. Please refer to the system and software requirements document for full details on compatibility.
13 SAP Hybris Cloud for Customer - Access and Support

References to software downloads and support access.

Where to Get SAP Hybris Cloud for Customer solution

In the SAP Support portal Software Downloads page (https://support.sap.com/software.html), choose Installations and Upgrades if you want to download a product that you currently do not have (but have a valid contract for), or if you wish to download a new version of the product. You will require the Download Software authorization, which you can request via your company’s SAP System Administrator.

Updates or Hotfixes

In the SAP Hybris wiki page for Cloud for Customer Release Center, choose What’s New in Hotfix Collection for documentation on fixes for specific features of the latest version of the solution.

Support

Get access to Knowledge Base articles using the SAP Communities portal SAP Hybris Cloud for Customer Communities.

Documentation

For detailed documentation for the complete SAP Hybris Cloud for Customer solution portfolio, refer to the SAP Help portal.

Your Feedback

Send us your impressions and queries on our documentation @ Idea Place for SAP Hybris Cloud for Customer.
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