



# SAP



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## About the Tutorial

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In today's competitive market, it is important to meet customer requirements and align your sales, marketing and service business lines to provide higher customer satisfaction. It is also important to design a cheap, integral solution that helps an organization to achieve its objectives and meet customer needs in a flexible environment.

SAP Cloud for Customer (C4C) is a cloud solution to manage customer sales, customer service and marketing activities efficiently and is one of the key SAP solutions to manage customer relationship.

## Audience

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SAP Cloud for Customer (SAP C4C) is a software as a service (SaaS) platform for sales and service. The platform is composed of SAP Cloud for Sales and SAP Cloud for Service, which are marketed as separate entities by SAP.

## Prerequisites

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Before you start proceeding with this tutorial, we are assuming that you are already aware of the basics of Supply Chain Management and Customer Relationship Management.

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# 1. SAP C4C – Introduction

In today's competitive market, it is important to meet customer requirements and align your sales, marketing and service business lines to provide higher customer satisfaction. It is also important to design a cheap, integral solution that helps an organization to achieve its objectives and meet customer needs in a flexible environment.

SAP Cloud for customer (C4C) is a cloud solution to manage customer sales, customer service and marketing activities efficiently and is one of the key SAP solution to manage customer relationship.

SAP C4C is based on the following individual products-

- SAP Cloud for Sales
- SAP Cloud for Marketing
- SAP Cloud for Social Engagement

Following are the key objectives of SAP Cloud for Customer-

- Relationships
- Collaboration
- Insight
- Business Processes

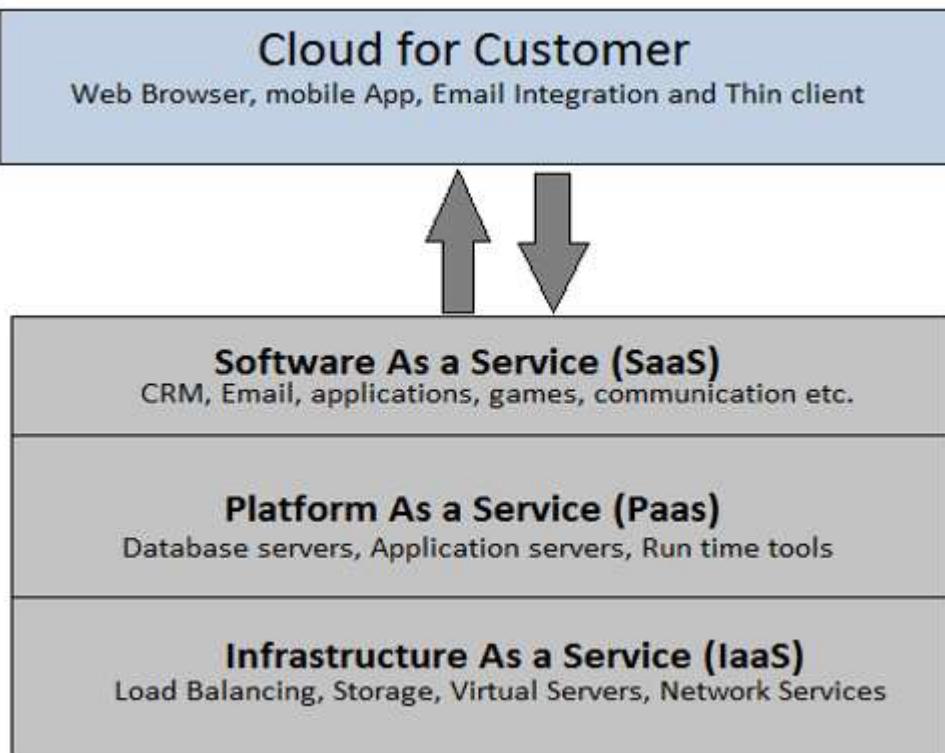


## SAP C4C Key Points

Following are some interesting facts about SAP C4C-

- SAP Cloud for Customer solution is available from June 20, 2011.
- SAP C4C is available in 19 languages as on May 2015.
- You can easily integrate C4C solution to SAP ECC, CRM and Outlook using SAP NW Process Integration or SAP HANA Cloud Integration HCI for standard scenarios.

- SAP C4C is a new product of SAP based on SaaS (software as a service), PaaS (Platform as a service) and IaaS (Infrastructure as a service).
- SAP C4C connectors are available for popular middleware like Dell Boomi for cloud integration, Informatica, MuleSoft for application integration etc.



## **Advantages of SAP C4C**

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Following are the benefits of using C4C management-

- One of the key benefits of using SAP C4C is its operation expenditure cost and operation maintenance.
- You can take licenses as per your requirement and it can be increased on demand.
- SAP C4C solution is managed by vendor and all operational costs and maintenance is the vendor's responsibility.
- SAP C4C solution allows you to manage customer needs from anywhere and with seven-layer security from cloud service providers.
- You can access all customer information regardless where they are stored or available.
- SAP C4C is based on cloud and use secure and fast communication using web, mobile and supporting mobile platforms iOS, Android and Windows devices, in both online and offline mode.

## SAP C4C vs On-Premise

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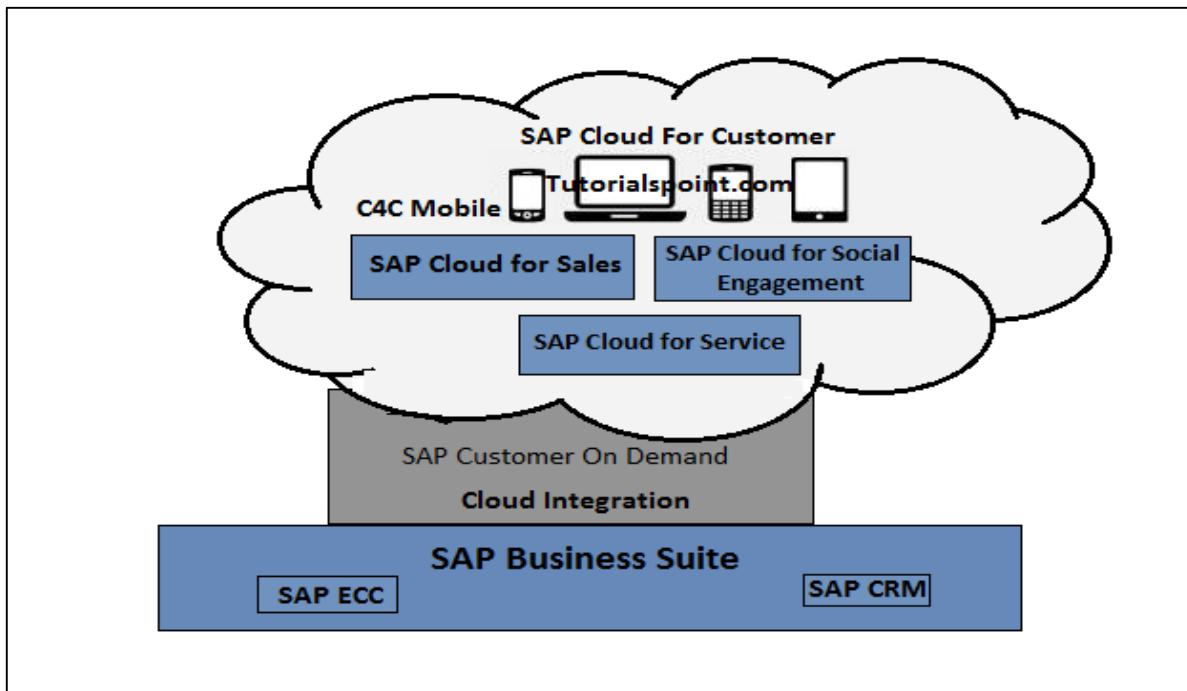
Given below are the key differences between Cloud for Customer and on-premise solution-

<b>Feature</b>	<b>Cloud for Customer</b>	<b>On Premise Company owned</b>
Solution location	On Cloud. Off the premise	On Premise
Solution Ownership	SAP/subscription	Company owned
Business Model	Operational Expenditure	Capital Expenditure
Cost	Less	High
Licenses and Users	As per demand	Peak
Solution Management	Vendor	Company
Capital Expenditure	Only operational expenditure like end-users' system and user creation	Cost of IT infrastructure is very high. Example: Servers and user licenses etc.

## 2. SAP C4C – Architecture

SAP C4C provides prepacked integration for SAP ECC, CRM and Outlook. It consists of HTML5 UI, Silverlight UI, and mobile Apps for IOS, Android platform and HANA for HANA Cloud integration HCI.

SAP C4C has multitenant architecture where solution and components are shared between multiple customers. There is an option to go for single tenant by paying additional cost. In a multiple tenant environment, all the updates and releases are built on C4C custom solutions for multiple clients.



SAP C4C solution can be easily integrated with SAP ERP and CRM on-premise solution. There are two ways of integration-

- **SAP Process Integration PI/PO:** This integration is recommended when you are already using process integration for on-premise systems.
- **SAP HANA Cloud Integration HCI:** This integration is recommended when you have to perform cloud-to-cloud integration.

The C4C integration to CRM on-premise could be on the basis of-

- Level of customization required
- Whether the functionality is required to be on the cloud/on the field
- The master data governance rules within the company
- Sales organization structure, etc.

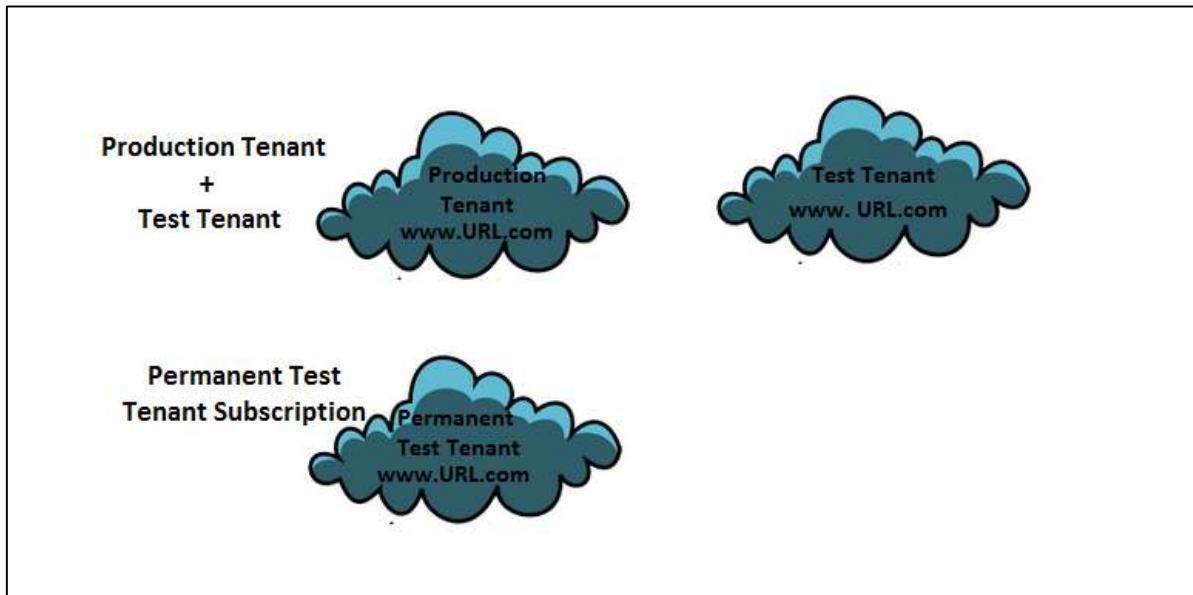
## Example

The frontline sales team will generate opportunities on the move with minimal information. The Top 5 - Customer, Product, Opportunity Phase, Value, Volume and the sales assistants in the back-office will enhance the opportunities with more data that are replicated to the on-premise solution.

The C4C integration to ERP could be on the basis of types of transactions needed to be displayed to the front end sales like orders, quotations or contracts. It is based on the role of the sales person whether they need pricing information, availability checks or even customer credit information. The principle here could be that of only deploying a "Must Have" integration with the ERP transactions.

### 3. SAP C4C – Public vs Private

When a customer goes for SAP C4C production tenant, there is a test tenant provided as free to the customer. A separate unique URL is provided for each tenant. A customer can also purchase permanent test tenant subscription.

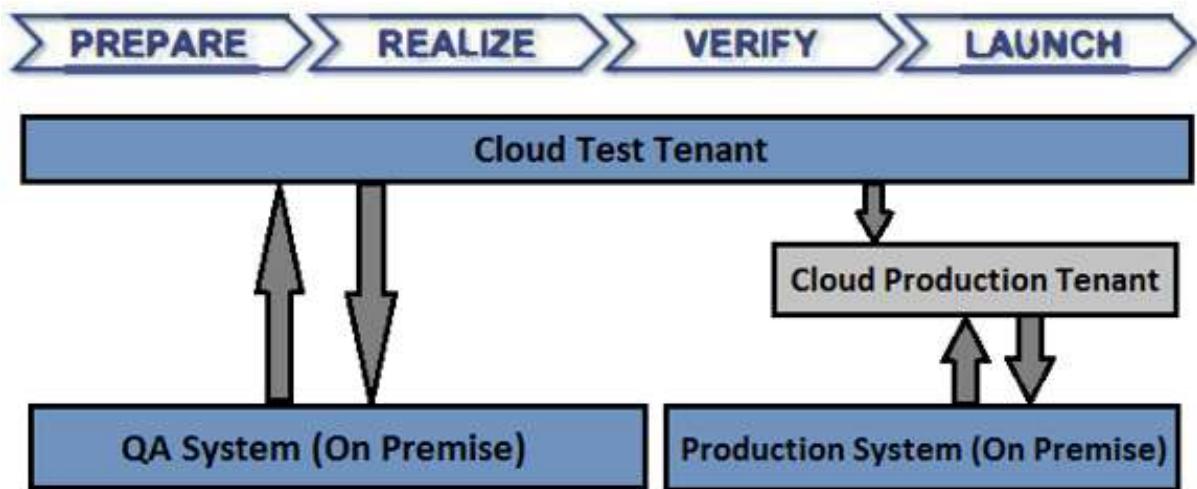


SAP C4C solution is hosted on cloud tenant that has many customers. This is called a **public tenant**.

C4C customers can also go for private purchase edition, which allows them to subscribe for a tenant with no other customer on it. SAP C4C production and test tenants are always of separate system. A customer cannot purchase a permanent test tenant for temporary basis. It is recommended only when SDK solution is in use.

SAP Cloud hosting cannot differentiate between a permanent and a temporary test tenant. It only supports up to two test tenants irrespective of which a customer can consider as temporary tenant and a permanent tenant.

Using a test and production tenant, a project can be implemented in the following way as demonstrated in the figure-



SAP C4C administrator can manage the test and production tenants using Service Control Center -> System View

The screenshot shows the SAP Service Control Center interface. At the top, there's a navigation bar with tabs like 'PRODUCTS', 'SERVICE CONTROL CE...', and others. Below the navigation bar, there's a sidebar with links such as 'OVERVIEW', 'SAP STORE ORDERS', 'USER SUBSCRIPTIONS', 'MAINTENANCE SCHEDULE', 'CALENDAR', 'LIST', 'SYSTEM AVAILABILITY', 'SYSTEMS', and 'CONTACT DETAILS'. A blue arrow points to the 'SYSTEMS' link, which is highlighted in blue. Another blue arrow points to the 'SYSTEMS' tab in the main content area, which displays a table titled 'SYSTEMS: Active Systems (2)'. The table lists two active systems: one with ID 740148452 and another with ID 740157624, both marked as 'Running'.

This screenshot shows the 'SYSTEMS: Active Systems (2)' table in the SAP Service Control Center. The table has columns for Status, System ID, System Type, and System URL. There are two entries: one for system 740148452 (Status: Running, System Type: Reference) and another for system 740157624 (Status: Running, System Type: Reference). A blue arrow points to the 'Request Creation' button in the toolbar above the table.

From the dropdown list, you can select Active systems, decommission system, or all systems and click on Go.

**SYSTEMS: Active Systems (2)**

This view gives you an overview of your productive and test systems and their current status. You can sort systems you are logged on to your productive systems.

Show	Active Systems	Go
Group By	Active Systems	Request Creation
St...	Decommissioned Systems	Request Termination
	All Systems	Copy Solution
	System Type	System URL



You can use request creation option to request a new system. Different options can be selected for requesting a new system like-

- Copy of Source System
- Initial System (Copy Solution Profile)
- Copy of Source System

## 4. SAP C4C – User Interface

In SAP C4C system we have two types of UIs. In this chapter, we will discuss in detail the UIs of SAP C4C.

### HTML 5

SAP C4C is used by end-users. This is considered as light version and provides fast and easy access to different work centers suitable for the end-users in C4C environment.

The user interface framework for SAP C4C for end-users is based on HTML 5. All business user features and functions are available in HTML 5. Most of the administrator features and functions are still only available in Silverlight.

To access HTML 5-SAP C4C user interface, open Internet Explorer and type your tenant URL-



Enter the user name and password and select the language. Click **Log on**.

You will land on HTML 5-C4C user interface.

The screenshot shows the SAP C4C Silverlight interface. At the top, there's a navigation bar with links like FEED, NEW BUSINESS (OBSOLETE), SERVICE ENTITLEMENTS, PRODUCTS (OBSOLETE), CUSTOMERS, PEOPLE, and more. Below the navigation is a sidebar with various icons for tasks like Home, Search, and Help Center. The main area is titled 'FEED' and contains a 'Post an Update' input field with a blue arrow icon. Below it is a list of updates, each with a small icon, a timestamp, and some text. To the right of the feed list is a vertical sidebar with links for TAGS, SHELF, HELP CENTER, FEED, EMPLOYEES, and MORE.

## Silverlight

This C4C-Silverlight user interface is used by Administrator. For this, you need to install Microsoft Silverlight in your local system.

**Note:** The default client is HTML5 but C4C administrators can launch the Silverlight UI from the Adaptation menu to access the configuration relevant work centers.

To open Silverlight UI mode, go to the Adapt tab at the top and select **Launch Microsoft Silverlight**.

The screenshot shows the SAP C4C Adaptation menu. At the top, there are tabs for ANALYSIS and COMPETITORS. A teal arrow points upwards from the main content area towards the 'Adapt' tab. Another teal arrow points downwards from the 'Adapt' tab towards the 'Launch in Microsoft Silverlight®' button at the bottom right of the menu. The menu itself lists several options: Company Settings, Company Branding Images, Edit Master Layout, Edit Smartphone Layout, New Page Layout, Edit Page Layout, Assign Page Layout, Delete Page Layout, Export Layout, Import Layout, Revert Changes for This Screen, and the final button.

A new window will open. This window is SAP C4C in Silverlight mode.

The screenshot shows the SAP C4C Application and Use dashboard. The top navigation bar includes links for Business Analytics, Business Configuration, Business Partners, New Business, and Help. On the left, there's a vertical toolbar with icons for search, refresh, and other functions. The main area is titled "APPLICATION AND USE..." and contains several sections:

- Quick Links:** A grid of links:
  - Incidents and Service Tasks: Incidents
    - New Incidents (52)
    - My Open Incidents (0)
    - Incidents Where Provider Needs More Information (0)
    - Incidents with Incident Proposal from Provider (5)
    - Incidents In Process (5)
    - My Issues Open Incidents (0)
    - Incidents In Process by Provider (0)
    - Incidents Pending Action by Requester (0)
  - User and Access Management: Work
    - Open Tasks (70)
  - User and Access Management: Business Users
    - Locked Business Users (0)
  - Business Data Consistency: Process Compliant
    - Open Errors with Tasks (8)
  - Business Data Consistency: Business Document Differences of last Week (0)
  - Business Data Consistency: Data Flow Verification
    - Open Results with Differences (0)
    - Open Incomplete Results (0)
  - Task Distribution: Business Task Management
    - Unassigned Items (1000)
    - Authorized Tasks with Errors (0)
  - Input and Output Management: Web Service Monitoring (94/530)

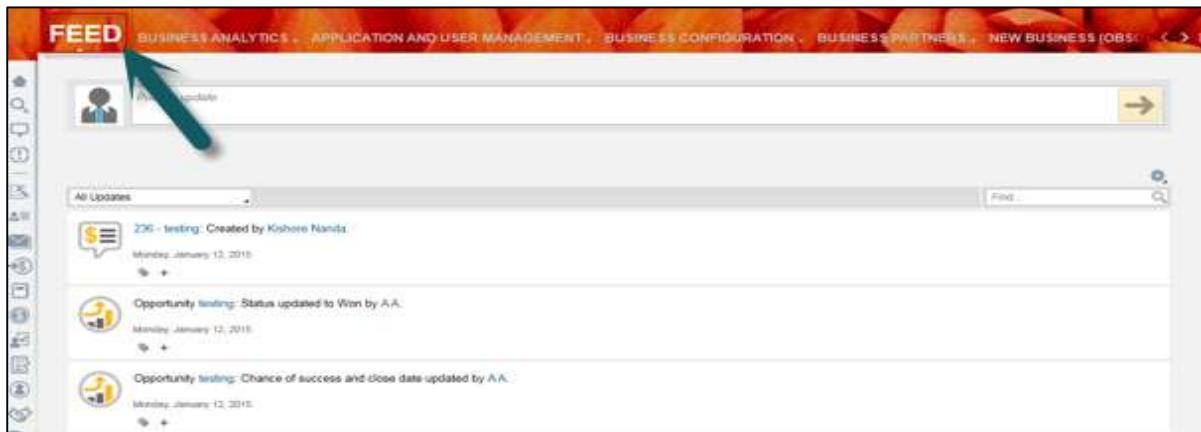
Below these sections, there are two status indicators: "Loading Data" on the left and "Loading Data" on the right. The bottom right corner of the dashboard has a small "Close" button.

# 5. SAP C4C – Work Centers

When you open SAP Cloud for Customer in Silverlight mode, you can access multiple work centers to perform various administrative and configuration tasks.

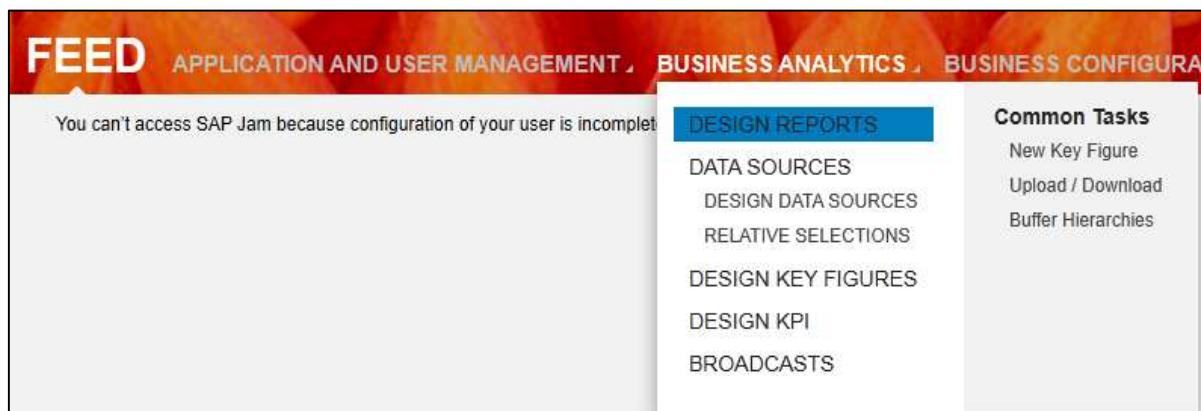
## Feed

The Feed work center shows all the updates and events like create, assign of ticket, lead, sales order etc.



## Business Analytics

The Business Analytics work center is responsible to create custom report, design new data source, design key figures, and design KPI.



## Application and User Management

The Application and User Management work center is responsible for performing tasks like creating business users, creating business roles, task distribution etc.

OVERVIEW	TASK DISTRIBUTION	BACKGROUND JOBS
INCIDENTS AND SERVICE TASKS	BUSINESS TASK MANAGEMENT	NEWS AUTHORIZING
INCIDENTS	APPROVAL PROCESSES	COMPLIANCE
SERVICE TASKS	WORKFLOW RULES	IT COMPLIANCE
USER AND ACCESS MANAGEMENT	SUBSTITUTIONS	SAP LIVE LINK
WORK	EMPLOYEE WORK DISTRIBUTION	BUSINESS FLEXIBILITY
BUSINESS USERS	INPUT AND OUTPUT MANAGEMENT	MASHUP WEB SERVICES
SUPPORT AND TECHNICAL USERS	PRINT QUEUES	MASHUP AUTHORIZING
BUSINESS ROLES	E-MAIL AND FAX QUEUES	MASTER TEMPLATE MAINTENANCE
USER REGISTRATIONS FOR OAUTH2 WE...	FILE INPUT	FORM TEMPLATE MAINTENANCE
BUSINESS DATA CONSISTENCY	FORM TEMPLATE SELECTION	MICROSOFT OFFICE® TEMPLATE MAINT...
PROCESS COMMUNICATION ERRORS	OUTPUT CHANNEL SELECTION	FLEXIBILITY CHANGE LOG
BUSINESS DOCUMENT DIFFERENCES	WEB SERVICE MESSAGE MONITORING	DOWNLOAD CENTER
DATA FLOW VERIFICATION RESULTS	COMMUNICATION SYSTEMS	REPORTS
DATA FLOW VERIFICATION RUNS	COMMUNICATION ARRANGEMENTS	LIST
	COMMUNICATION CERTIFICATES	GALLERY
	ID MAPPING FOR INTEGRATION	
	SERVICE EXPLORER	

## Business Configuration

The Business Configuration work center is responsible for Implementation Projects, Download and Upload Code list, etc.

- OVERVIEW
- IMPLEMENTATION PROJECTS
- REPORTS
- DOWNLOAD CODE LIST
- UPLOAD CODE LIST

## Business Partner

In the Business Partner work center, we can create and edit business partners like service agents etc.

SERVICE AGENTS	Common Tasks
BUSINESS PARTNERS	New Service Agent
BUSINESS PARTNER CHANGES	Maintain Cross-Account Sales Data
	Mass Change Account Data

## Service Entitlement

In Service Entitlement work center, we can create and edit Service Levels (SLA) and Service Categories.



## Organizational Management

In Organizational Management work center, we can create and edit organizational structure, job definitions, work distribution- organizational and employee work distribution.



## Customer

In the Customer work center, we can see customers like account, contacts, and individual customer, target group, sales intelligence etc.



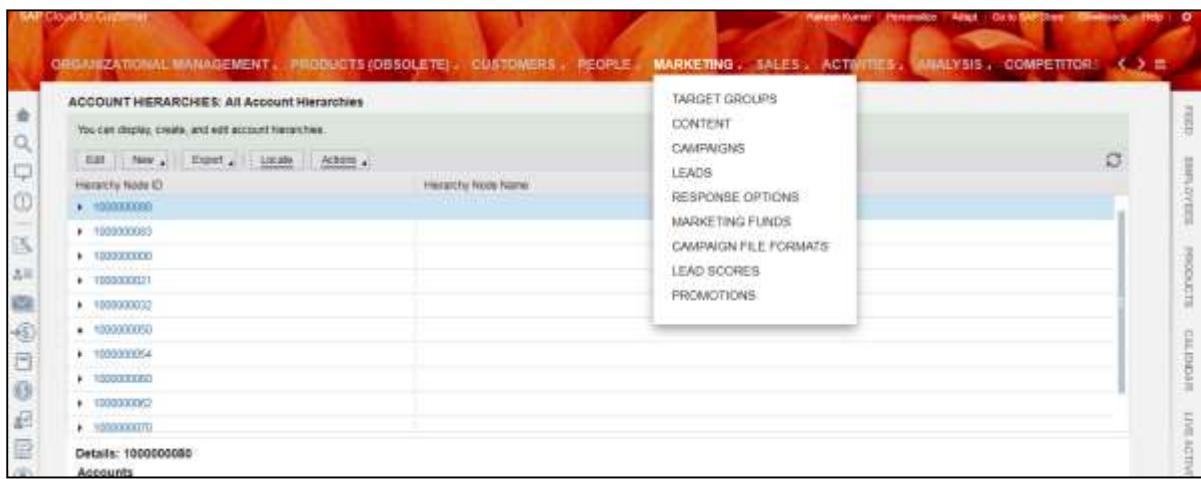
## People

In this work center, we can see employees, delegates, legacy group, group, etc.



## Marketing

In the Marketing work center, we can perform marketing activities like- create and edit target groups, content, campaigns, leads, response options, marketing funds, campaign file formats, lead scores, promotions.



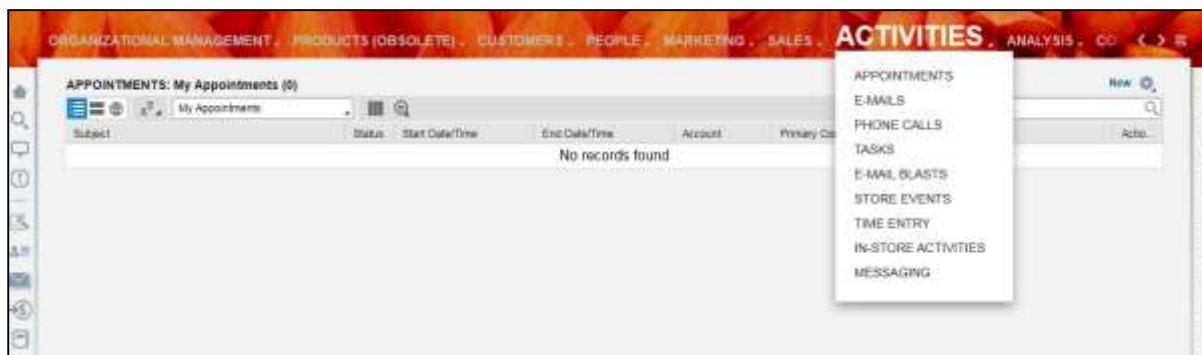
## Sales

Under the Sales work center, we can perform sales activity like- Sales lead, lead, deal registration, opportunities , sales quotes, sales orders, forecasts, forecasts administration, pipeline simulation, territories, realignment run, sales target planning.



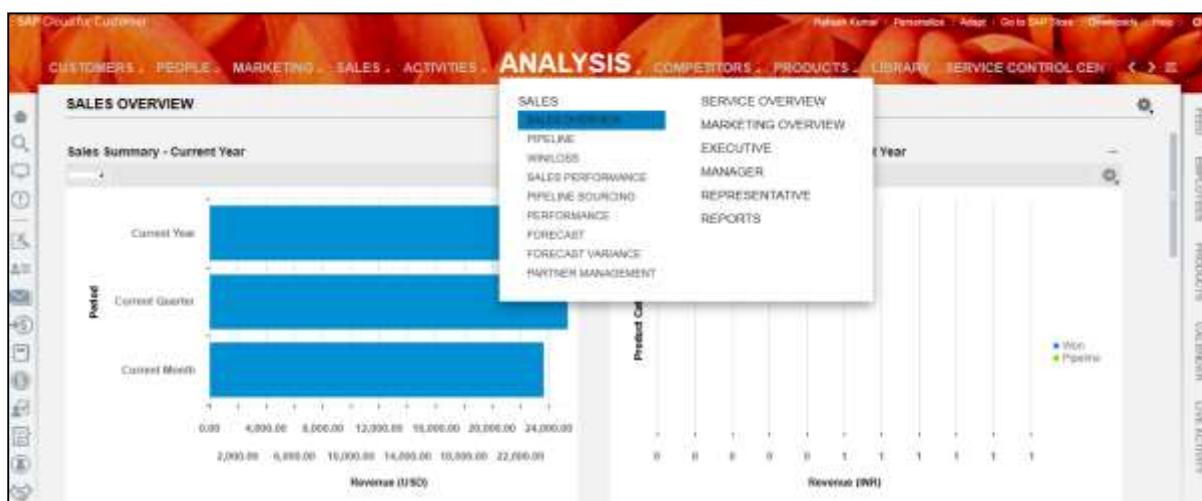
## Activities

Here we can perform activities like appointments, e-mails, phone calls, tasks, E-mail blasts, store events, time entry, in-store activities, messaging, etc.



## Analysis

Analysis is used to access all the reports.



## Competitor

Under the Competitor work center, we can maintain information regarding competitors and competitor products.

The screenshot shows the SAP Cloud for Customer interface with the 'COMPETITORS' work center selected. The main area displays a table of competitors with columns for Name, City, Web Site, Classification, and Status. A context menu is open over the first row, showing options like 'COMPETITORS' and 'COMPETITOR PRODUCTS'. The left sidebar includes links for 'COMPETITORS: All (81)', 'COMPETITOR PRODUCTS', and 'Find'. The right sidebar lists 'FREQUENTLY USED' links such as 'HOME', 'PRODUCTS', 'CALENDAR', and 'LIVE ACTIVITY'.

Name	City	Web Site	Classification	Status
IBM		www.IBM.com	Medium Threat	Active
Karen	Taipei	www.Karen.com	Low Threat	Active
Jemstar	Paris	www.Jemstar.com	Medium Threat	Active
Mysa	Melbourne	www.Mysa.com	Medium Threat	Active
Vista	Paris	www.Vista.com	Big Threat	Active
3D	Bordeaux	www.3D.com	Big Threat	Active
Munix	Mila	www.Munix.com	Low Threat	Active
Rhynx	Amarante	www.Rhynx.com	Medium Threat	Active
Linkware	Aguascalientes	www.Linkware.com	Medium Threat	Active
Fanta	Porto	www.Fanta.com	Big Threat	Active
Lala	Lisbon	www.Lala.com	Big Threat	Active
Buzzzone	Amsterdam	www.Buzzzone.com	Low Threat	Active
Levi's	Rotterdam	www.Levi's.com	Medium Threat	Active

## Products

Here we can create, edit and view products, product administration, product categories, product list, price list, discount list, registered products and warranties.

The screenshot shows the SAP Cloud for Customer interface with the 'PRODUCTS' work center selected. The main area displays a table of products with columns for Name and Category. A context menu is open over the first row, listing options like 'PRODUCTS', 'PRODUCT ADMINISTRATION', 'PRODUCT CATEGORIES', 'PRODUCT LISTS', 'PRICE LIST', 'DISCOUNT LIST', 'REGISTERED PRODUCTS', and 'WARRANTIES'. The left sidebar includes links for 'PRODUCTS' and 'Find'. The right sidebar lists 'FREQUENTLY USED' links such as 'HOME', 'PRODUCTS', 'CALENDAR', and 'LIVE ACTIVITY'.

Name	Category
	Loading Data

## Library

The Library work center is used to share any knowledge-based article that you think may be useful for other user. You can share any useful article, document for reference.

The screenshot shows the SAP C4C Library interface. At the top, there are navigation links: PEOPLE, MARKETING, SALES, ACTIVITIES, ANALYSIS, COMPETITORS, PRODUCTS, LIBRARY, SERVICE CONTROL CENTER, and [OBSOLET]. The LIBRARY tab is active. Below the header, there is a search bar with the placeholder 'All' and a magnifying glass icon. A toolbar on the left contains various icons for file operations like add, delete, and search. The main area displays a table titled 'LIBRARY: All (10)'. The columns are: Title, Version, Type, Changed On, Changed By, and Lock. The data in the table includes:

Title	Version	Type	Changed On	Changed By	Lock
1_SAP ABAP Training - Beginner Guide -		MP4	13/05/2014	Eddie Smoke	No
2_SAP Training_Beginners Guide - Learn...		RAR Archive	11/28/2014	Eddie Smoke	No
1_SAP System Overview - Beginners Gui...		MP4	11/28/2014	Eddie Smoke	No
CompetitiveAnalysis.pptx		Microsoft Office P...	09/21/2013	Eddie Smoke	No
WORD_Template_with_Sales_Notes_SA...		HTML Document	06/23/2013	Eddie Smoke	No
DHL_Special_Announcement_Handletter...		HTML Document	06/23/2013	Eddie Smoke	No
SustainabilityCampaign.html		HTML Document	06/23/2013	Eddie Smoke	No
BIOM_Convergence_V2.1.0019.zip		ZIP Archive	06/21/2013	Eddie Smoke	No
DirectEmailCampaign-UserGuide.docx		Microsoft Office W...	06/21/2013	Eddie Smoke	No
highway.png		PNG Image	06/21/2013	Eddie Smoke	No
Monarch Worldwide Support- Orange.html		HTML Document	06/21/2013	Eddie Smoke	No
Monarch Worldwide Support Email Auto...		HTML Document	06/21/2013	Eddie Smoke	No
Monarch Worldwide Support Email Survey...		HTML Document	06/21/2013	Eddie Smoke	No

## Service Control Center

Under the Service Control Center, we can see all the order that we have placed to SAP and can place new order like buying of new user licenses etc.

We can also view the maintenance schedule of the system like down-time.

The screenshot shows the SAP C4C Service Control Center interface. At the top, there are navigation links: PEOPLE, MARKETING, SALES, ACTIVITIES, ANALYSIS, COMPETITORS, PRODUCTS, LIBRARY, and SERVICE CONTROL CENTER. The SERVICE CONTROL CENTER tab is active. Below the header, there is a search bar with the placeholder 'All' and a magnifying glass icon. A toolbar on the left contains various icons for file operations like add, delete, and search. The main area displays an 'OVERVIEW' section with four main categories:

- SAP Store Orders**: Manage your SAP Store orders and view their status.
- Systems**: Get an overview of all your Active Systems.
- Contact Details**: View your contact and company details.
- User Subscriptions**: Monitor your active users and your licensed users.

Each category has a sub-menu with more options:

- SAP STORE ORDERS**: USER SUBSCRIPTIONS, MAINTENANCE SCHEDULE, CALENDAR, LIST
- SYSTEMS**: SYSTEM AVAILABILITY, SYSTEMS, CONTACT DETAILS
- CONTACT DETAILS**: ACTIVE CONTACTS
- USER SUBSCRIPTIONS**: CURRENT MONTH

## ECC Search

Under ECC Search work center, we can search sales order in back end system SAP ECC.

The screenshot shows the SAP C4C ECC Search interface. The top navigation bar includes tabs for OFFERS, STORES, TEAM CALENDAR, UTILITIES, ACTIVITY PLANNER, ADMINISTRATOR, DATA CLEANSING, PARTNERS, and SURVEYS. The 'OFFERS' tab is highlighted. Below the navigation bar is a search bar with fields for Sales Order ID, Purchase Order ID, Sold-To ID, Customer Internal ID, Sold-To Name, Order Type, Created By ID, Sales Org, Distribution Channel, and Division. A 'Find' button and a magnifying glass icon are also present. The main content area displays a table for 'Sales Order Items' with columns for Line Item, Product ERP ID, Internal ID, Description, Billed Quantity, Unit, Net Value, Currency, Tax, Overall Status, Delivery Status, Pricing Date, and Billing Date.

## Offers

The Offers work center is used to maintain offers in C4C.

The screenshot shows the SAP C4C ECC Search interface with the 'OFFERS' work center selected. The top navigation bar is identical to the previous screenshot. The left sidebar shows a list of work centers: OFFERS (selected), STORES, TEAM CALENDAR, UTILITIES, ACTIVITY PLANNER, ADMINISTRATOR, DATA CLEANSING, PARTNERS, and SURVEYS. The 'OFFERS' item has a sub-link 'Offers [0]'. The main content area displays a table for 'Offer ID' with columns for Description, Valid From, and Valid To. A 'Find' button and a magnifying glass icon are at the top of the table.

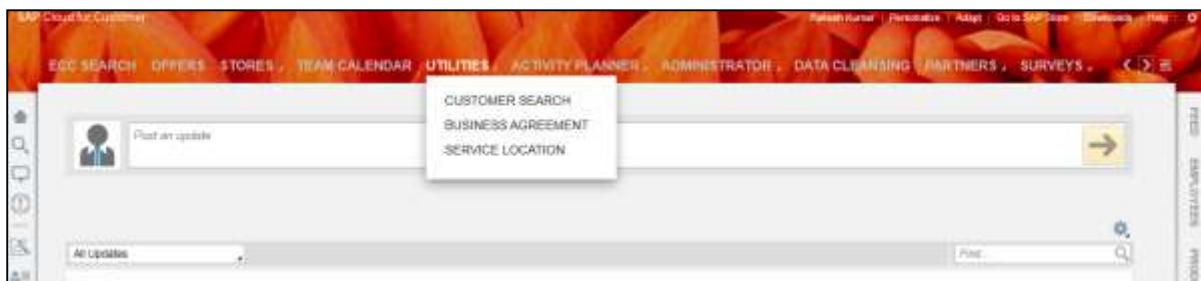
## Stores

In Stores work center, we can maintain details about stores and team calendar.

The screenshot shows the SAP C4C ECC Search interface with the 'STORES' work center selected. The top navigation bar is identical to the previous screenshots. The left sidebar shows a list of work centers: STORES (selected), TEAM CALENDAR, UTILITIES, ACTIVITY PLANNER, ADMINISTRATOR, DATA CLEANSING, PARTNERS, and SURVEYS. The 'STORES' item has a sub-link 'Avatar update'. The main content area displays a table for 'All Updates' with three entries: '236 - testing: Created by Kathrin Noritz' (Monday, January 12, 2015), 'Opportunity testing: Status updated to Won by AA' (Monday, January 12, 2015), and 'Opportunity testing: Chance of success and close date updated by AA' (Monday, January 12, 2015). A 'Find' button and a magnifying glass icon are at the top of the table.

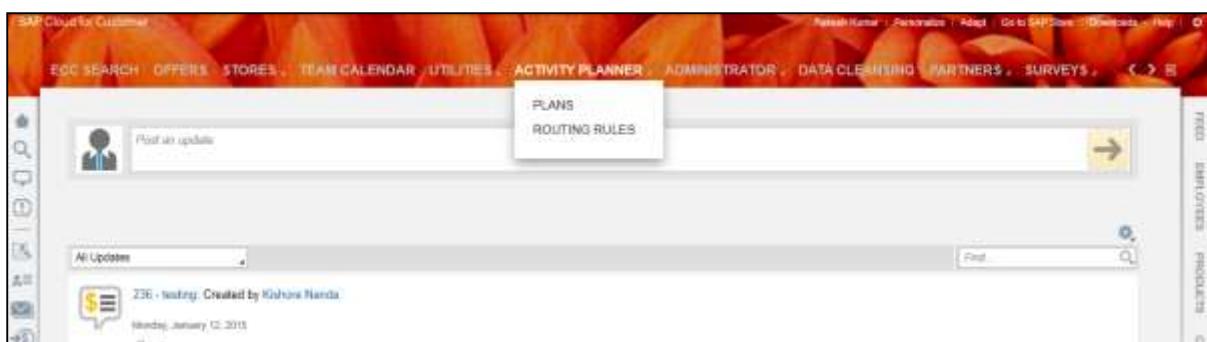
## Utilities

Under the utilities work center, we can view business agreements, service locations and customer search.



## Activity Planner

Under the Activity Planner work center, we can have plans and routing rules for C4C system.



## Administrator

This is a very important work center and is available to the admin users. Most of the customization activities in C4C is done in this work center. This work center is available in Silverlight view of C4C system.

It has many customizations like service and social , sales and marketing setting, mash up services, workflows, user management, approval process etc.



## Data Cleansing

The Data Cleansing work center is used to perform data cleaning processes.



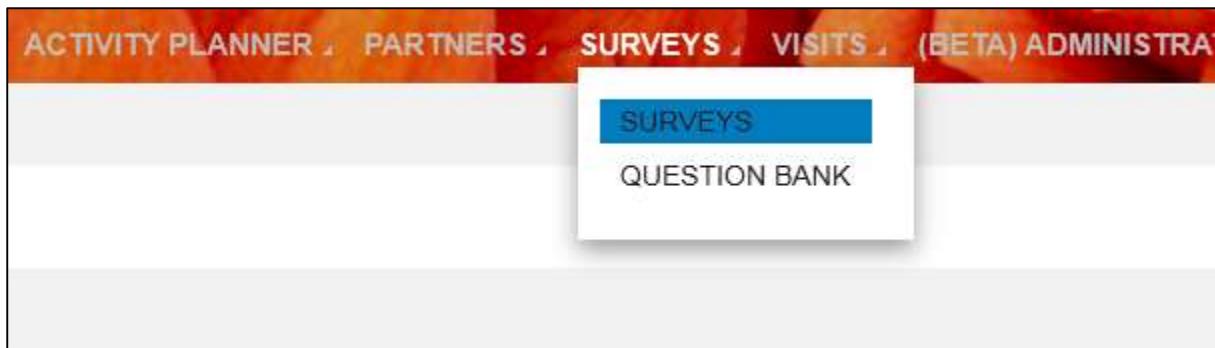
## Partners

Under Partners work center, we can view partners, partner contacts, and partner applications.



## Surveys

The Surveys work center is used to maintain surveys.



## Visits

The Visits work center is used to perform visit planner, maintain visits, routes and tours.



## Service

The Service work center is a very important tab for service agents. You can view tickets, work tickets, queues etc.

This screenshot shows the SAP Cloud for Customer Service work center. The top navigation bar includes links for DATA CLEANSING, PARTNERS, SURVEYS, VISITS, (BETA) ADMINISTRATION, and DATA WORKBENCH. The main title is SERVICE. A sub-header DEPRECATED: TICKETS CON is visible. On the left, there's a sidebar with icons for Tickets, Contracts, Employee Support, Installed Base, Resource Scheduler, and Time Recording. The main content area displays a table titled 'QUEUE: Tickets in my Territories (0)'. The table has columns for Priority, ID, Subject, Status, Customer, and Channel. A message 'No records found' is displayed. To the right of the table is a sidebar with a tree menu: QUEUE, TICKETS, WORK TICKETS, EMPLOYEE SUPPORT, SOCIAL MEDIA MESSAGES, TEMPLATES, UNASSOCIATED E-MAILS, TERRITORIES, and TICKET HIERARCHY. Below the tree menu are buttons for 'Edit', 'Call...', 'App...', and 'New'.

## Installed Base

Installed base has all the information regarding product that is installed at customer-end like manufacture, serial number, model, warranty etc.

This screenshot shows the SAP Cloud for Customer Installed Base work center. The top navigation bar includes links for DATA CLEANSING, PARTNERS, SURVEYS, VISITS, (BETA) ADMINISTRATION, and DATA WORKBENCH. The main title is INSTALLED BASE. A sub-header DEPRECATED: TICKETS CONTRACTS DEPRECATED: EMPLOYEE SUPPORT is visible. On the left, there's a sidebar with icons for Tickets, Contracts, Employee Support, Installed Base, Resource Scheduler, and Time Recording. The main content area displays a table titled 'MAINTENANCE PLANS: All Maintenance Plans (0)'. The table has columns for Name, ID, Status, Schedule Type, Schedule Conditions, and Changed On. A message 'No records found' is displayed. To the right of the table is a sidebar with a 'New' button and search/filter options.

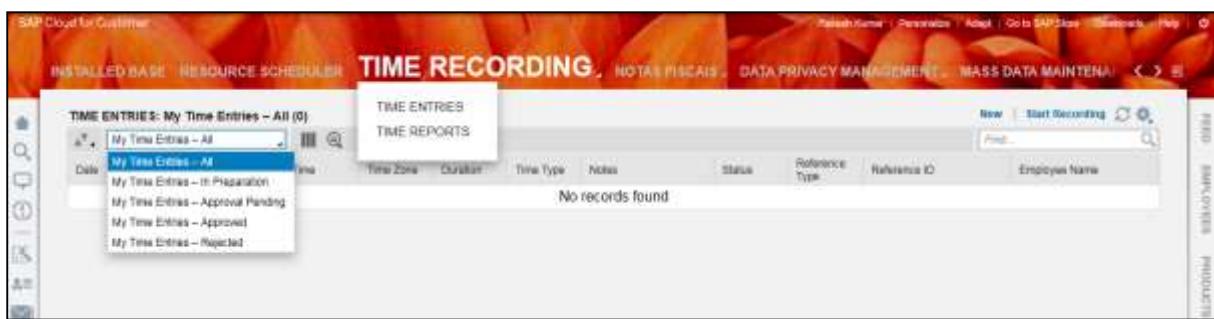
## Resource Scheduler

Resource Scheduler is used to maintain resource scheduler like roster of employee.

This screenshot shows the SAP Cloud for Customer Resource Scheduler work center. The top navigation bar includes links for DATA CLEANSING, PARTNERS, SURVEYS, VISITS, (BETA) ADMINISTRATION, and DATA WORKBENCH. The main title is RESOURCE SCHEDULER. A sub-header TIME REC is visible. On the left, there's a sidebar with icons for Tickets, Contracts, Employee Support, Installed Base, Resource Scheduler, and Time Recording. The main content area displays a table titled 'RESOURCE SCHEDULER'. The table has a single row labeled 'My Team's Demands'. A note below the table states 'Invalid custom pane definition: no assembly specified.' To the right of the table is a sidebar with a 'Save' button and other controls.

## Time Recording

In Time Recording work center, we can maintain time entries and time report. We can measure the working time of service agent on particular task.



## Partner Development

In Partner Development work center, we give authorization to the user to perform SDK (software development kit) operation.



# 6. SAP C4C – Project Implementation & Scoping

As a part of SAP C4C, there are various activities, which you need to perform under project implementation. We will discuss some of the key activities here.

## Preparation Phase

First step in implementation is preparing the system. This includes creating system administrator for implementation, scoping of C4C system, defining migration strategies for data from on-premise to cloud system, etc.

## Fine tuning

As per the scope of project, fine tuning involves performing customization in SAP ECC on-premise system to perform configuration and set up your customizing as per the project scope. It includes creating users and business roles, defining organization structure and management rules, etc.

## Data Migration and Integration

Data Migration and Integration includes performing manual data migration by using default templates cloud system. In case of integration is in scope then perform initial data load from on-premise source system to cloud system.

## Test

In the Test phase, you perform unit, regression, Data test, etc.

## Go Live

Go Live work center includes activities like user enablement. SAP C4C administrator is enabled who takes care of day-to-day operation and support activities before it goes live. Once this is done, you can set the system to Live.

## SAP C4C Scoping

---

When you start project implementation in Cloud for Customer, you need to select the scoping elements that are required for business. There are the different available Scoping Elements under different categories that you can select.

▶ Marketing	<input checked="" type="checkbox"/>
▶ Sales	<input checked="" type="checkbox"/>
▶ Service	<input checked="" type="checkbox"/>
▶ Industry Solution	<input checked="" type="checkbox"/>
▶ Business Performance Management	<input checked="" type="checkbox"/>
▶ Communication and Information Ex...	<input checked="" type="checkbox"/>
▶ Administration	<input checked="" type="checkbox"/>
▶ Compliance	<input checked="" type="checkbox"/>
▶ General Business Data	<input checked="" type="checkbox"/>
▶ Built-in Services and Support	<input checked="" type="checkbox"/>
▶ Partner Channel Management	<input checked="" type="checkbox"/>

Each of these elements allows you to select activities related to project implementation. For example, for marketing, you can define project scoping from the following activities-

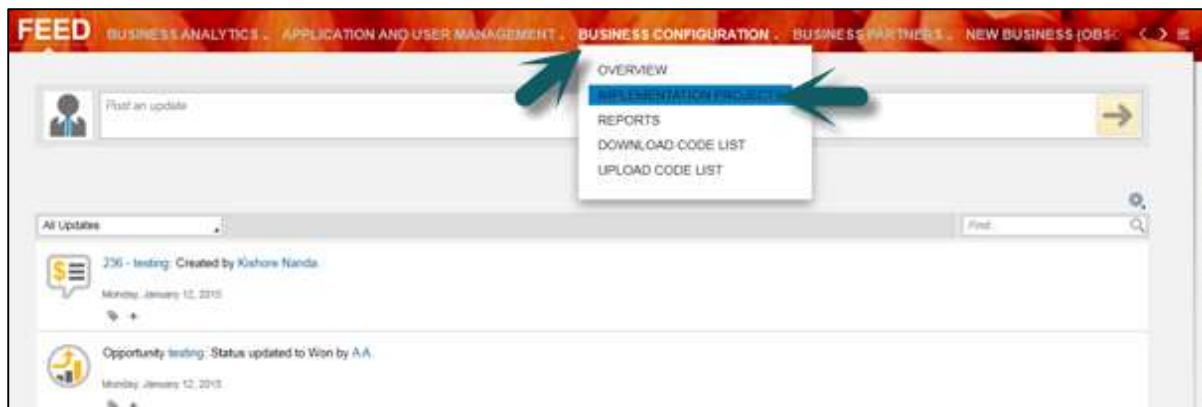
▼ Marketing	<input checked="" type="checkbox"/>
▼ Market Development	<input checked="" type="checkbox"/>
■ Market Information	<input checked="" type="checkbox"/>
■ Competitor Information	<input checked="" type="checkbox"/>
■ Communication for Marke...	<input checked="" type="checkbox"/>

Similarly, you can select scoping elements under Sales, Service, Business Performance Management, communication and information Exchange and from other elements.

## Project Implementation in SAP C4C

To implement a project in SAP C4C, follow the steps given below-

**Step 1:** Go to Business Configuration work center -> Implementation Project.



**Step 2:** Click the **New** tab to start implementing a new project. As a project already exists, click **Edit Project Scope** to see the steps in implementation.

The screenshot shows the SAP C4C interface with a banner at the top. Below the banner, a table lists 'IMPLEMENTATION PROJECTS: All Current Projects (1)'. The first project is titled 'First implementation'. The 'Edit Project Scope' button is highlighted with a red box and a teal arrow. Another teal arrow points to the 'Edit Project Scope' button in the toolbar above the table. The table has columns for Status, Title, Created By, Created On, and System Status. The details section below the table shows 'Status: Started' and 'Activities: 15 of 74 completed'.

## Implementation Steps

Once you click **Edit Project scope**, you will see the following implementation steps-

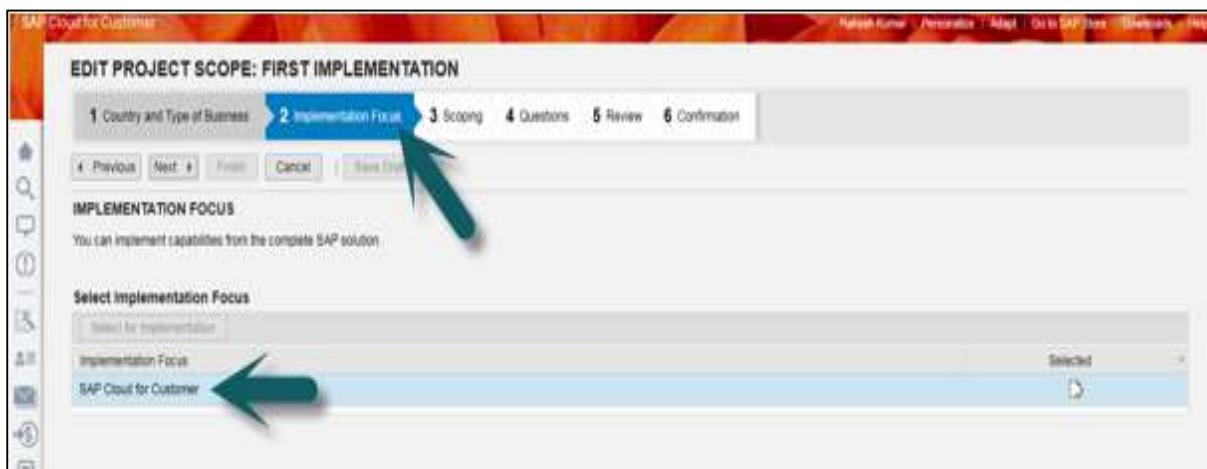
### Step 1: Country and Type of Business

Select the name of the country where you have to implement the solution. This allows you to put specific country conditions like language and financial settings. Once you select the country, click **Next**.

The screenshot shows the 'EDIT PROJECT SCOPE: FIRST IMPLEMENTATION' wizard. Step 1: Country and Type of Business is selected. A teal arrow points to the 'Next >' button. Another teal arrow points to the 'Country and Type of Business' section, which includes a note about reviewing countries and a dropdown menu showing flags and country names.

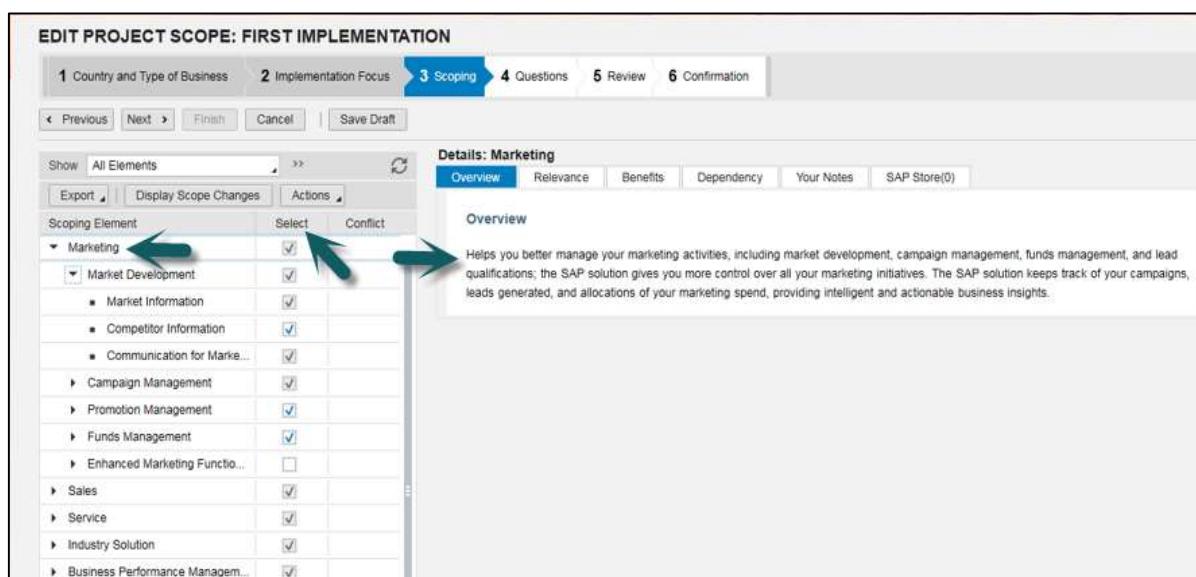
## Step 2: Implementation Focus

In this step, you need to select the solution to implement. You can select SAP Cloud for customer and click **Next**.



## Step 3: Scoping

Select scoping elements to implement in the new project. Different Scoping Elements are available under different categories in the left pane. In the right pane, you can see the details of each element under the **Overview** tab.



## Step 4: Questions

This is a step under scoping where you review questions as per your business needs. You have different elements to select and under each category, you have questioning information that you have to answer.

### Example

Under the **Marketing** element, you have an option to select questions about competitor information and competitor product.

**SAP Cloud for Customer**

**EDIT PROJECT SCOPE: FIRST IMPLEMENTATION**

1 Country and Type of Business    2 Implementation Focus    3 Scoping    **4 Questions**    5 Review    6 Confirmation

< Previous    Next >    Finish    Cancel    Save Draft

Show All Elements    Display Scope Changes    Hide Details    Actions

Scoping Element    Type

- Marketing (1)
  - Market Development
    - Market Information
    - Competitor Information
    - Communication for Market Development
  - Campaign Management
  - Promotion Management
  - Sales
  - Service
  - Industry Solution

**Questions for Competitor Information**

Business-Option	Review Status	In Scope
Group: Competitor (1) You can maintain information about your competitors.	Reviewed	<input checked="" type="checkbox"/>
Group: Competitor Products (1) Do you maintain information about your competitor products for comparison?	Reviewed	<input checked="" type="checkbox"/>

Details:    Dependency    Your Notes    SAP Store(0)    Explanation

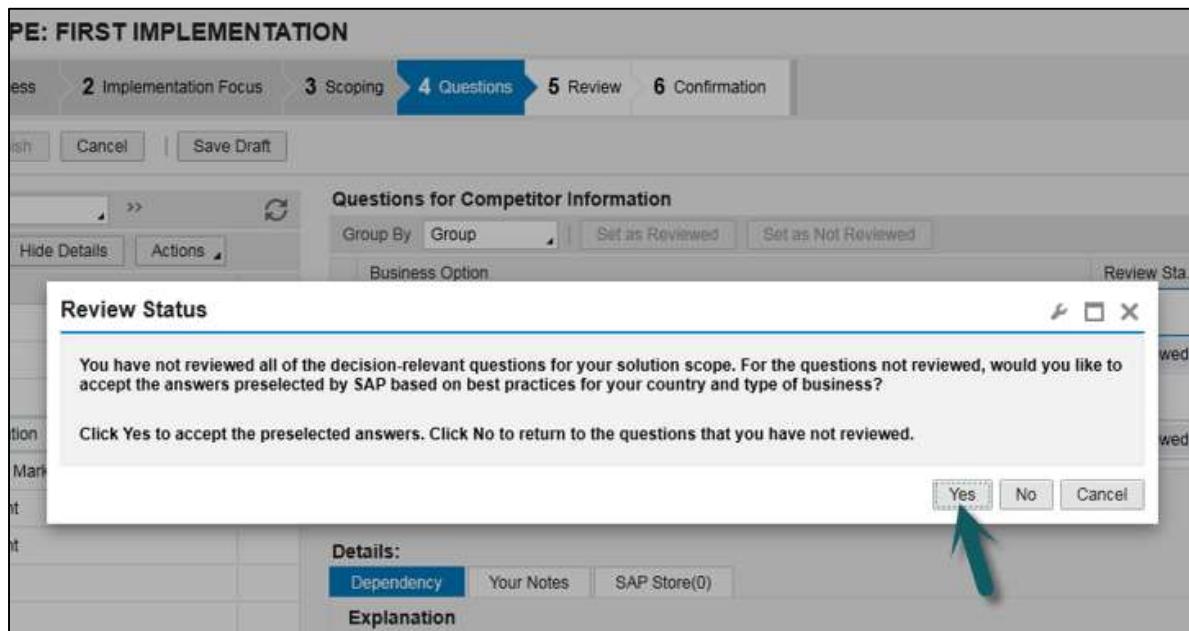
  

**Questions for Campaign Execution**

Business Option	Review Status	In Scope
Group: Campaigns (2) You can execute campaigns by exporting addressable target group members to a comma-separated values (.csv) file.	Reviewed	<input checked="" type="checkbox"/>
Do you want to execute campaigns by sending e-mails directly to target groups?	Reviewed	<input checked="" type="checkbox"/>
Group: Approval for Campaigns (1) Do you want to use a multi-step approval process for campaigns?	Reviewed	<input checked="" type="checkbox"/>

In case you do not want to review all the questions, click the Next button at the top. You will be prompted to select the answers preselected by SAP, based on the best practices for your country and type of business as shown in the following screen shot.

Click **Yes**.



## Step 5: Review

This step allows you to review your project before you confirm the project implementation. You can view the report based on the implemented solution and project scoping.

### Your Solution Proposal- Executive Summary

This option allows you to view the summary of your company's profile, complete description of areas, work centers and business packages selected.

You can also maintain the description of your project, planned implementation time line, etc.

**EDIT PROJECT SCOPE: FIRST IMPLEMENTATION**

1 Country and Type of Business    2 Implementation Focus    3 Scoping    4 Questions    **5 Review**    6 Confirmation

< Previous    Next >    Finish    Cancel

**REVIEW AND CONFIRM**

You have successfully completed scoping and created a comprehensive blueprint for your SAP solution.

Your SAP solution has produced the following reports based on your input and decisions. You can use the links provided to view these reports.

You must click Finish to save all of your decisions, as well as any notes or attachments you added, in your unique solution profile. These links will remain available to you after confirmation.

**SCOPING RESULTS** ←

- Your Solution Proposal - Executive Summary An executive summary containing your company profile information and complete descriptions of the business areas, work centers, and business packages you selected.
- Your Solution Proposal A comprehensive report containing your company profile information and complete descriptions of the business areas, work centers, and business packages you selected.
- Your Notes Summary A summary of all the notes you made during scoping.

**GENERAL INFORMATION**

Title: First Implementation

\*Description: Cloudway Implementation Project

**PLANNED IMPLEMENTATION TIMELINE**

\*Start Date: 10/29/2012 [ ] ←

\*End Date: 10/29/2012 [ ]

## Step 6: Confirmation

You can view your scoping results before you complete your project implementation. Just as in Review tab, you can view the scoping summary and reports under the Scoping result. Once you are done, click **Close**.

**EDIT PROJECT SCOPE: FIRST IMPLEMENTATION**

1 Country and Type of Business    2 Implementation Focus    3 Scoping    4 Questions    5 Review    **6 Confirmation**

< Previous    Next >    Close

**Confirmation**

You have successfully completed scoping. Your solution will have the capabilities you selected. The following documents contain your scoping results.

**What do you want to do next?**

**VIEW YOUR SCOPING RESULTS:**

- Your Solution Proposal - Executive Summary
- Your Solution Proposal
- Your Notes Summary

# 7. SAP C4C – Fine-tuning

Before your project goes live, you need to perform fine-tuning in your project. This phase organizes all the mandatory configuration activities that you need to complete in a logical sequence.

This allows you to tailor the solution to your specific needs before going live by checking predefined settings and entering additional settings for your selected scope. You can also add optional configuration activities.

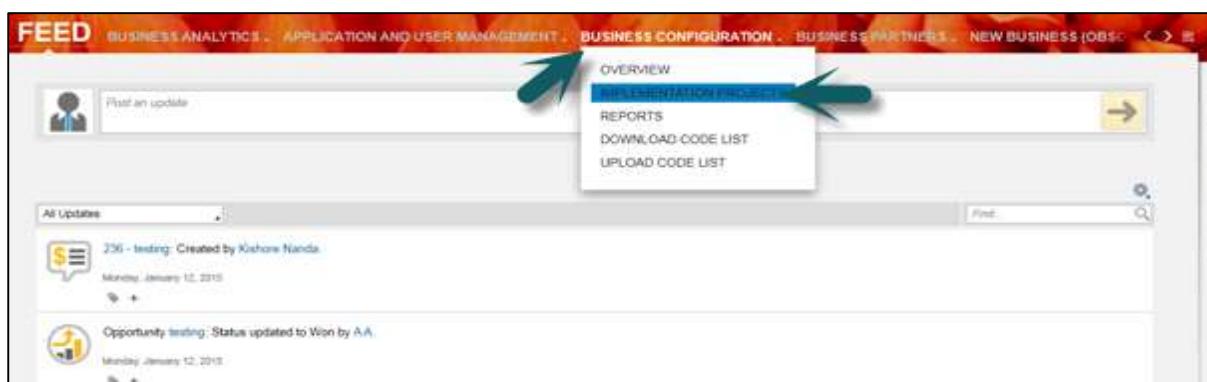
**Example:** You can maintain number range for different entities like product, customer etc. as per your business needs.

## Fine-tune and Go Live

Follow the given steps to perform fine-tuning and go live in a new implementation project.

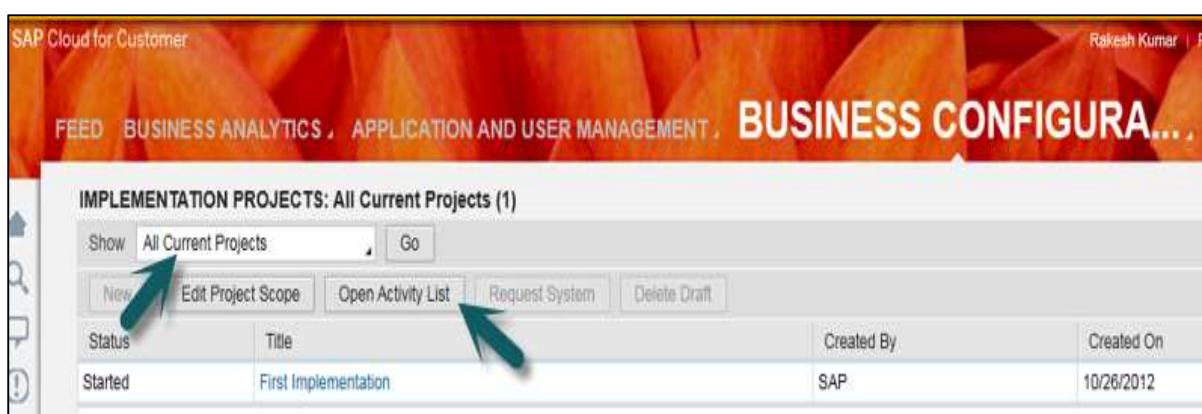
### Step 1

Go to Business configuration -> Implementation Project.



### Step 2

In the new window, select **All Current Projects** from the drop down list and click **Open Activity List**.



This allows you to view all the preliminary activities you need to carry out to get your company ready to use the solution productively. The activities in this phase are mainly related to project management and include reviewing the project plan, confirming that scoping has been completed, and knowledge is transferred to the administrators. You can also create your own activities manually and add them to the activity list.

### Step 3

Click the **Prepare** tab. Under the **Prepare** tab, you can see all the open activities of your current project.

Name	Activity Type	In Project	Owner	Prerequisites	Repetition Req.	Activity Group	Change By	Change On
Confirm Milestone Design	Project Activity	Yes		No	No	Verify Scoping	Ravi Prakash	10/29/2012 3:55 AM PST
Define Administrators for...	Project Activity	Yes		No	Yes	Define Administrator	Oliver Collins	01/20/2016 12:44 AM PST
Read Documentation for...	Project Activity	Yes		No	No	Prepare ERP Integra...	Ravi Prakash	01/18/2015 11:48 PM PST

Click **Total Activities** under the **Prepare** tab. Here, you will see the count of Open Activities, In progress Activities, and Closed Activities.

### Step 4

Click the **Fine Tune** tab. The Fine Tune phase organizes all the mandatory configuration activities that you need to complete in a logical sequence. It allows you to tailor the solution to your specific needs before going live by checking the predefined settings and entering additional settings for your selected scope. You can also add optional configuration activities.

**ACTIVITY LIST: FIRST IMPLEMENTATION**

Total Activities In Project: 34      Open Activities: 37      In Progress Activities: 0      Closed Activities: 7

St... Name	Activity T...	In Project	Owner	N...	Predecessor...	Repetition R...	Activity Group	Change By	Change On
Perform Organizational S...	Data Migrat...	Yes		No	Yes		Perform Organ...	Ravi Prakash	10/29/2012 6:14 AM PST
Business Task Manager...	Configurat...	Yes		No	No	Sales	Eddie Smoke	02/11/2016 10:57 PM PST	
Party Role Definition	Configurat...	Yes		No	No	Sales	David Lee	01/28/2016 2:28 AM PST	
Activities	Configurat...	Yes		No	No	Sales	Eddie Smoke	01/21/2016 1:12 AM PST	
Territory Hierarchy Level	Configurat...	Yes		No	No	Sales	Ravi Prakash	03/26/2013 2:43 AM PST	
Territory Management Ru...	Configurat...	Yes		No	Yes	Sales	Ravi Prakash	03/26/2013 2:43 AM PST	
Sales Lead Conversion U...	Configurat...	Yes		No	No	Sales	Ravi Prakash	01/28/2016 10:13 PM PST	
Sales Cycles and Phases	Configurat...	Yes		No	No	Sales	Oliver Coltrane	01/21/2016 1:20 AM PST	
Sales Assistant	Configurat...	Yes		No	No	Sales	Oliver Coltrane	01/21/2016 1:20 AM PST	

## Step 5

Click the **Integrate and Extend** tab. The **Integrate and Extend** phase allows you to transfer your configured solution to your company to start using it productively. You do this by integrating with third party applications that already operate in your company and move the basic, master, and transaction data from your legacy system(s) to your new solution. You also decide what form, report, and user interface extensions you require to meet your company's specific needs.

**ACTIVITY LIST: FIRST IMPLEMENTATION**

Total Activities In Project: 32      Open Activities: 25      In Progress Activities: 1      Closed Activities: 6

St... Name	Activity T...	In Project	Owner	N...	Predecessor...	Repetition R...	Activity Group	Change By	Change On
Perform Organizational S...	Data Migrat...	Yes		No	Yes		Perform Organ...	Ravi Prakash	10/29/2012 6:14 AM PST
Business Task Manager...	Configurat...	Yes		No	No	Sales	Eddie Smoke	02/11/2016 10:57 PM PST	
Party Role Definition	Configurat...	Yes		No	No	Sales	David Lee	01/28/2016 2:28 AM PST	
Activities	Configurat...	Yes		No	No	Sales	Eddie Smoke	01/21/2016 1:12 AM PST	
Territory Hierarchy Level	Configurat...	Yes		No	No	Sales	Ravi Prakash	03/26/2013 2:43 AM PST	
Territory Management Ru...	Configurat...	Yes		No	Yes	Sales	Ravi Prakash	03/26/2013 2:43 AM PST	
Sales Lead Conversion U...	Configurat...	Yes		No	No	Sales	Ravi Prakash	01/28/2016 10:13 PM PST	
Sales Cycles and Phases	Configurat...	Yes		No	No	Sales	Oliver Coltrane	01/21/2016 1:20 AM PST	
Sales Assistant	Configurat...	Yes		No	No	Sales	Oliver Coltrane	01/21/2016 1:20 AM PST	

## Step 6

Click the **Test** tab. Perform unit, regression, data test, etc. under this tab. In addition, request of Production system (copy of Test should be performed). The **Test** phase contains activities that allow you to define test scenarios and guides, verify that your core business processes are running as desired, and transfer knowledge to the end-users before your solution goes live.

The screenshot shows the SAP Cloud for Customer interface with the title "ACTIVITY LIST: FIRST IMPLEMENTATION". The "Test (3/1 Completed)" tab is selected. The main content area displays a single activity row:

St...	Name	Activity T...	In Project	Owner	Prerequisites...	Repetition Requ...	Activity Group	Change By	Change On
<input checked="" type="radio"/>	Confirm Milestone: Go-Live Readiness Acceptance	Project Activity	Yes	Ravi Prakash	Yes	No	Finalize Integration Test	Ravi Prakash	10/29/2012 3:42 AM PST

Below the activity list, a section titled "DETAILS: CONFIRM MILESTONE: GO-LIVE READINESS ACCEPTANCE" contains the message: "You must confirm that testing has been completed, indicating that you accept the readiness of your solution, before you can continue with your project."

## The Go-Live Phase

The **Go Live** phase includes the final activities that you must complete to enable your solution to be used productively in your company. Typical activities include preparing and performing cutover, setting up internal support teams, and confirming that you are ready to go live.

At the end of this phase, all mandatory and outstanding configuration issues are resolved, legacy data is migrated to the production system, knowledge transfer is complete, and the project is signed off and closed.

### Step 7

Click the **Launch/Go-Live** tab.

The screenshot shows the SAP Cloud for Customer interface with the title "ACTIVITY LIST: FIRST IMPLEMENTATION". The "Go Live (0/3 Completed)" tab is selected. The main content area displays a single activity row:

St...	Name	Activity T...	In Project	Owner	Prerequisites...	Repetition Requ...	Activity Group	Change By	Change On
<input checked="" type="radio"/>	Assign Contact to Contact	Project Activity	Yes	Ravi Prakash	No	No	Prepare Cutover	Ravi Prakash	10/29/2012 3:42 AM PST

# 8. SAP C4C – Organizational Management

Organizational Management (OM) provides the central source of organizational information in SAP C4C. It is used for creating the organizational structure and provides a graphical representation of an organization chart. In addition, it shows the different entities and aspects of the company. SAP C4C accesses OM whenever business processes require information related to the company's organization.

To set up a correct organization structure, you should follow-

- **Time Dependency:** All the information stored is time dependent, as you need to enter a valid **from and to** date.
- **Active Version vs Planning Version:** You can also select between the planning version and the active version of the organizational information.
- **Consistency Checks:** You can perform some checks, which help in maintaining OM all the time.
- **Partial Activation:** You can also activate an organizational structure in parts, while continuing to work with other parts.

## SAP C4C Organizational Structure

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An organization can be structured in different ways based on the goals and targets and it defines the modes in which an organization operates. The organizational structure set up defines the reporting lines and automatic work distribution.

Setting up an organizational structure enables automated routing of work such as leads, accounts and service requests. The organizational structure comprises of units and provides a unified, graphical representation of your company's organizational data.

Decide whether-

- You want to distribute the work based on your company's structure.
- You have created or uploaded employee and product data.
- You have gathered all the data relevant to the organizational management, such as the legal, managerial, and functional data of your enterprise.

When you set up an organizational structure, it is always recommended you follow the top down approach, i.e., start with company residence and add the business lines, sales and service team.

## Set up an Organizational structure

Following steps will help you to set up an Organization Structure-

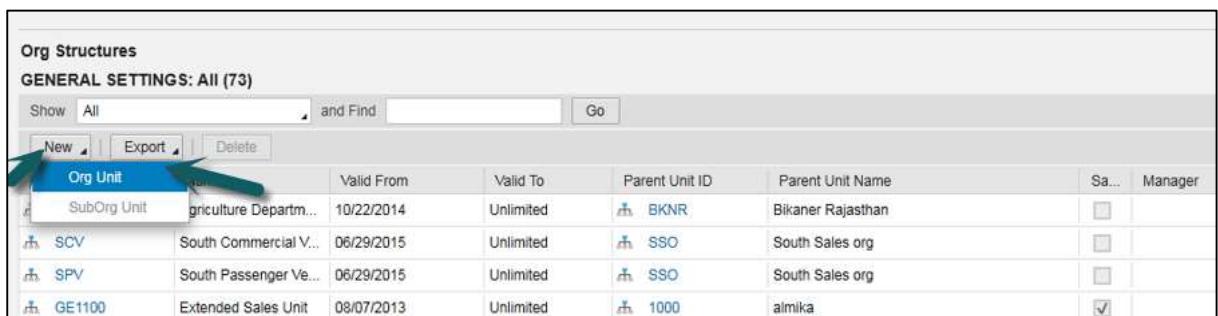
### Step 1

Go to **Administrator** and select **Org Structures**.



### Step 2

Click **Organization Unit -> New**.



### Step 3

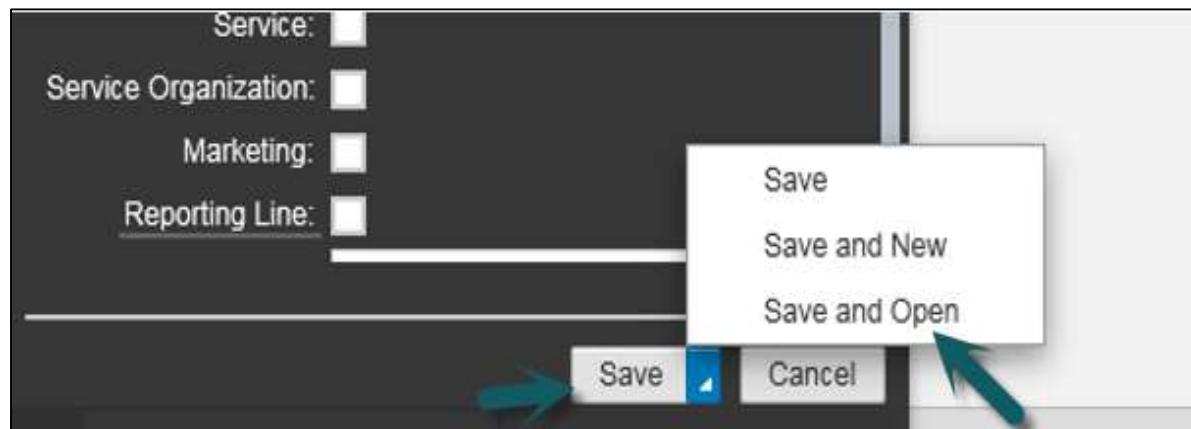
A new window opens. In this new window, enter the following details such as- Org Unit, Select ID, Valid from, Valid To, Company name and Country, etc.

**NEW ORG UNIT**

<b>*ID:</b>	Test
<b>Name:</b>	Test
<b>*Valid From:</b>	03/02/2016
<b>*Valid To:</b>	Unlimited
<b>Parent Unit:</b>	Test Ltd
<b>Company Name:</b>	Test Ltd
<b>Country:</b>	IN - India
<b>House Number:</b>	
<b>Street:</b>	
<b>City:</b>	Mumbai
<b>State:</b>	13 - Maharashtra
<b>Postal Code:</b>	
<b>Sales:</b>	
<b>Sales Organization:</b>	
<b>Service:</b>	
<b>Marketing:</b>	
<b>Reporting Line:</b>	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

#### Step 4

Click **Save** and select **Save and open** from the available options.



## Step 5

To save it as a parent unit, you have to check the option **Company** Name as shown below.

ORG UNIT		GENERAL		FUNCTIONS		EMPLOYEES	
TEST - TEST							
Valid From: 03/02/2016 Valid To: Unlimited Associated Business:		<b>PARENT UNIT</b> Valid From: _____ Valid To: _____ Parent Unit ID: _____ Parent Unit Name: _____ No records found					
<b>CURRENT DATA</b> Name: TEST Company Name: Test Ltd Department Name: Address: TEST Mumbai India Parent Unit ID: Parent Unit Name: <input checked="" type="checkbox"/> Company: <input checked="" type="checkbox"/> Sales: <input type="checkbox"/> Sales Organization: <input type="checkbox"/> Service: <input type="checkbox"/>		<b>ADDRESS</b> V. F.: D16 Valid To: Unlim. Name: TEST Company Name: Test Ltd Department N.: Address: Mumbai / IN		<b>DETAILS</b> Name: TEST Company Name: Test Ltd Department Name: Country: IN - India House Number: Street: City: Mumbai State: 13 - Maharashtra Postal Code:		<b>COMMUNICATION</b> Phone: Fax: Mobile: E-Mail: Web Site:	

An organization unit is created. Now you have to create sub units, business division, sales team, etc. To create a subunit, search the organization unit you have just created.

Org Structures							
GENERAL SETTINGS: Modified View - All (74)							
Show: Modified View - All		and Find:		0			
New	Export	Delete					
ID	Name	Valid From	Valid To	Parent Unit ID	Parent Unit Name	Sa...	Manager
BNR_AU	Agriculture Departm...	10/22/2014	Unlimited	BNR	Bikaner Rajasthan	<input type="checkbox"/>	<input type="checkbox"/>
SCV	South Commercial V...	06/29/2015	Unlimited	SSO	South Sales org	<input type="checkbox"/>	<input type="checkbox"/>
SPV	South Passenger Ve...	06/29/2015	Unlimited	SSO	South Sales org	<input type="checkbox"/>	<input type="checkbox"/>
GE1100	Extended Sales Unit	08/07/2013	Unlimited	1000	amika	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## Step 6

Select "Test" Organization unit and click **New** SubOrg unit.

Org Structures GENERAL SETTINGS: Modified View - All (4)							
	Org Unit	Name	Valid From	Valid To	Parent Unit ID	Parent Unit Name	Sa... Mana...
	SubOrg Unit	test Unit	10/22/2014	Unlimited	S3110	Level 1 Support Queue	<input type="checkbox"/>
	SU1101	TEST_SERVICE	06/29/2015	Unlimited	SU1100	Service Unit	<input type="checkbox"/>
	SU1102	TEST_QUEUE	06/29/2015	Unlimited	SU1101	TEST_SERVICE	<input type="checkbox"/>
	TEST	TEST	03/02/2016	Unlimited			<input type="checkbox"/>

## Step 7

Enter all the data for relevant fields for **SubOrg** unit as per the requirement and click the **Save and Open** button.

Org Structures GENERAL SETTINGS: Modified View - All (4)				
Show	Modified View - All	and Find	test	Go
	<b>NEW ORG UNIT</b> <div style="border: 2px solid red; padding: 10px;"> <p>ID: Test Service Unit</p> <p>Name: Test Service Unit</p> <p>Valid From: 03/02/2016</p> <p>Valid To: Unlimited</p> <p>Parent Unit: TEST</p> <p>Company Name:</p> <p>Country: IN - India</p> <p>House Number:</p> <p>Street:</p> <p>City:</p> <p>State: 13 - Maharashtra</p> <p>Postal Code:</p> <p>Sales: <input type="checkbox"/></p> <p>Sales Organization: <input type="checkbox"/></p> <p>Service: <input type="checkbox"/></p> </div>			
				<input type="button" value="Save"/> <input type="button" value="Cancel"/>

## Step 8

Go to the **Functions** tab at the top. If it is a service organization, select Service. Similarly, select sales for sales unit, marketing for marketing unit.

**ORG UNIT**  
TESTSERVICE - Test ...

**CURRENT DATA**

Name: Test Service Unit  
Company Name:  
Department Name:  
Address: Mumbai  
India  
Parent Unit ID: TEST  
Parent Unit Name: TEST  
Company:   
Sales:   
Sales Organization:   
Service:

**FUNCTIONS**

Valid From	Valid To	Co...	Sa...	Sa...	Se...	Se...	Marketing
03/02/2016	Unlimited	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Valid From: 03/02/2016  
Valid To: Unlimited  
Company:   
Sales:   
Sales Organization:   
Service:   
Service Organization:   
Marketing:   
Reporting Line:   
Currency:

## Step 9

Add employee and manager to this organization. Go to the **Employee** tab at the top and click **Add**.

**ORG UNIT**  
TESTSERVICE - Test ...

**CURRENT DATA**

Name: Test Service Unit  
Company Name:  
Department Name:  
Address: Mumbai  
India  
Parent Unit ID: TEST  
Parent Unit Name: TEST  
Company:   
Sales:   
Sales Organization:   
Service:

**FUNCTIONS**

**EMPLOYEES**

To assign an employee as a manager for the org unit, that employee must first be assigned to an org unit (this one or another). The employee master record for the manager will show the org unit to which he or she is assigned as an employee. Managers can be assigned to multiple org units.

Valid From	Valid To	Manager	Actions
No records found			

**MANAGERS**

An employee can only be assigned to one org unit at a time. Assign an employee to this org unit if they work on this org unit and report to a manager in this reporting line.

Valid From	Valid To	Employee	Job	Actions
No records found				

**EMPLOYEES**

An employee can only be assigned to one org unit at a time. Assign an employee to this org unit if they work on this org unit and report to a manager in this reporting line.

Valid From	Valid To	Employee	Job	Actions
No records found				

Add

## Step 10

When you click Add under Manager, add manager's name and validity period.

GENERAL FUNCTIONS EMPLOYEES

**MANAGERS**

To assign an employee as a manager for the org unit, that employee must first be assigned to an org unit (this one or another). The employee master record for the manager will show the org unit to which he or she is assigned as an employee. Managers can be assigned to multiple org units.

Valid From	Valid To	Manager	Actions
03/02/2016	Unlimited	Kenji Meza	

No records found

**EMPLOYEES**

An employee can only be assigned to one org unit at a time. Assign an employee to this org unit if they work on this org unit and report to a manager in this reporting line.

Valid From	Valid To	Employee	Job	Actions
No records found				

## Step 11

Similarly, add an employee in this sub unit. Select an employee type as sales agent, etc.

ORG UNIT

TESTSERVICE - Test ...

Valid From: 03/02/2016  
Valid To: Unlimited  
Associated Business...

CURRENT DATA

Name: Test Service Unit  
Company Name:  
Department Name:  
Address: Mumbai, India  
Parent Unit ID: TEST

GENERAL FUNCTIONS EMPLOYEES

**MANAGERS**

To assign an employee as a manager for the org unit, that employee must first be assigned to an org unit (this one or another). The employee master record for the manager will show the org unit to which he or she is assigned as an employee. Managers can be assigned to multiple org units.

Valid From	Valid To	Manager	Actions
03/02/2016	Unlimited	Kenji Meza	

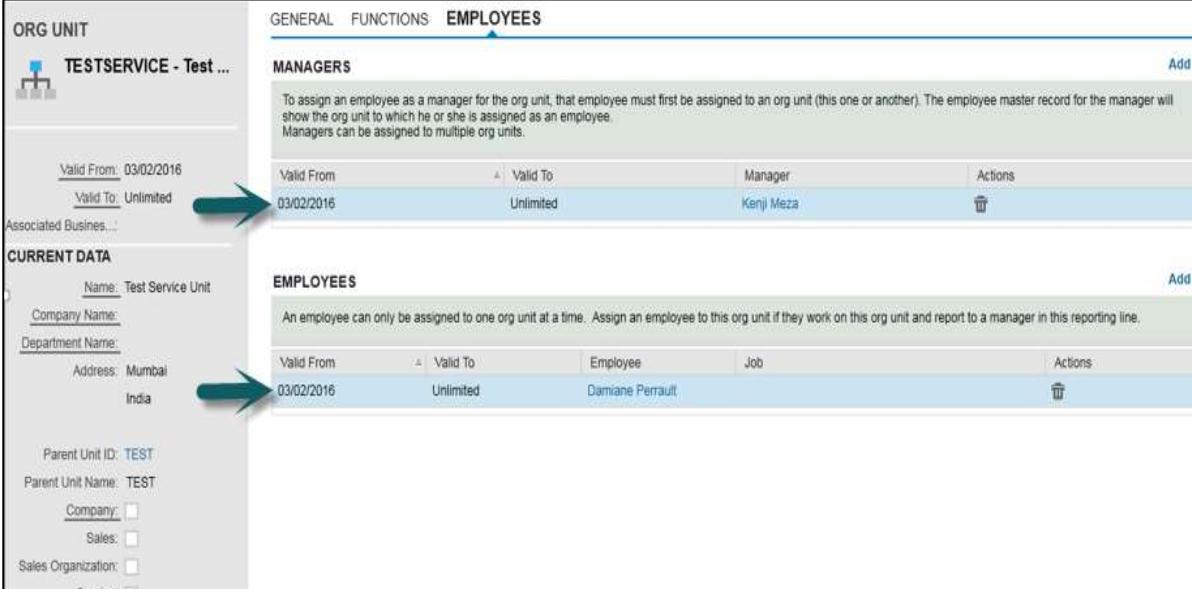
**EMPLOYEES**

An employee can only be assigned to one org unit at a time. Assign an employee to this org unit if they work on this org unit and report to a manager in this reporting line.

Valid From	Valid To	Employee	Job	Actions
No records found				

## Step 12

In addition, you can create Sales org unit, marketing org unit. All the steps are same; just choose the function as sale or marketing while creating the org structure.



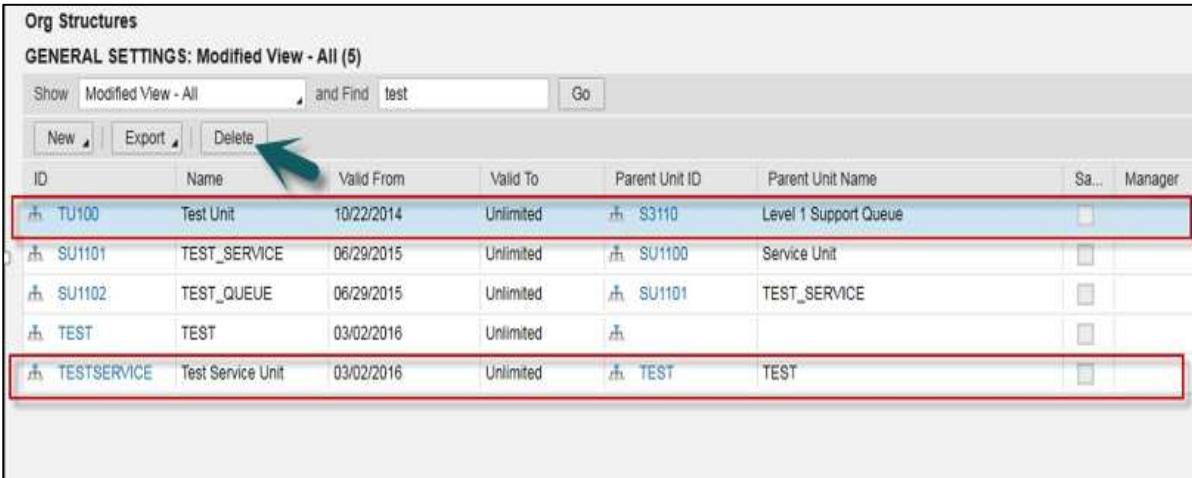
The screenshot shows the SAP C4C Org Unit creation interface. On the left, the 'ORG UNIT' section displays basic information for 'TESTSERVICE - Test ...'. It includes fields for 'Valid From' (03/02/2016), 'Valid To' (Unlimited), and 'Associated Business...'. On the right, under the 'EMPLOYEES' tab, there are two tables: 'MANAGERS' and 'EMPLOYEES'. A teal arrow points to the 'Valid From' field in the first row of the 'MANAGERS' table. Another teal arrow points to the 'Valid From' field in the first row of the 'EMPLOYEES' table.

Manager	Valid From	Valid To	Actions
Kenji Meza	03/02/2016	Unlimited	

Employee	Valid From	Valid To	Job	Actions
Damiane Perrault	03/02/2016	Unlimited		

## Step 13

To delete an organizational unit or sub unit, you can select the object from the list and click **Delete**.



The screenshot shows the SAP C4C Org Structures list view titled 'GENERAL SETTINGS: Modified View - All (5)'. It features a toolbar with 'Show', 'Modified View - All', 'and Find', 'test', 'Go', 'New', 'Export', and 'Delete' buttons. A teal arrow points to the 'Delete' button. Below the toolbar is a table with columns: ID, Name, Valid From, Valid To, Parent Unit ID, Parent Unit Name, Sales, and Manager. The table lists five organizational units: TU100 (Test Unit), SU1101 (TEST\_SERVICE), SU1102 (TEST\_QUEUE), TEST, and TESTSERVICE (Test Service Unit). The last two rows are highlighted with red boxes.

ID	Name	Valid From	Valid To	Parent Unit ID	Parent Unit Name	Sa...	Manager
TU100	Test Unit	10/22/2014	Unlimited	S3110	Level 1 Support Queue	<input type="checkbox"/>	<input type="checkbox"/>
SU1101	TEST_SERVICE	06/29/2015	Unlimited	SU1100	Service Unit	<input type="checkbox"/>	<input type="checkbox"/>
SU1102	TEST_QUEUE	06/29/2015	Unlimited	SU1101	TEST_SERVICE	<input type="checkbox"/>	<input type="checkbox"/>
TEST	TEST	03/02/2016	Unlimited	TEST	TEST	<input type="checkbox"/>	<input type="checkbox"/>
TESTSERVICE	Test Service Unit	03/02/2016	Unlimited	TEST	TEST	<input type="checkbox"/>	<input type="checkbox"/>

# 9. SAP C4C – Personalization

Personalization involves changing screen layouts, fields and output forms for a single user or group of users. SAP C4C provides several features that enable you to customize fields, screen layouts, and output forms.

## Personalization

Personalization enables individual users to modify their own view of the UI screen. Using Personalization, impacts the user making a change to the screen. This allows the users to tailor the system in a way they want to use it on a daily (or regular) basis.

In C4C, an administrator can disable this feature by going to **Adapt -> Company Setting -> Disable user Personalization features.**



### Step 1

To start personalization, click the **Personalize** tab at the top.

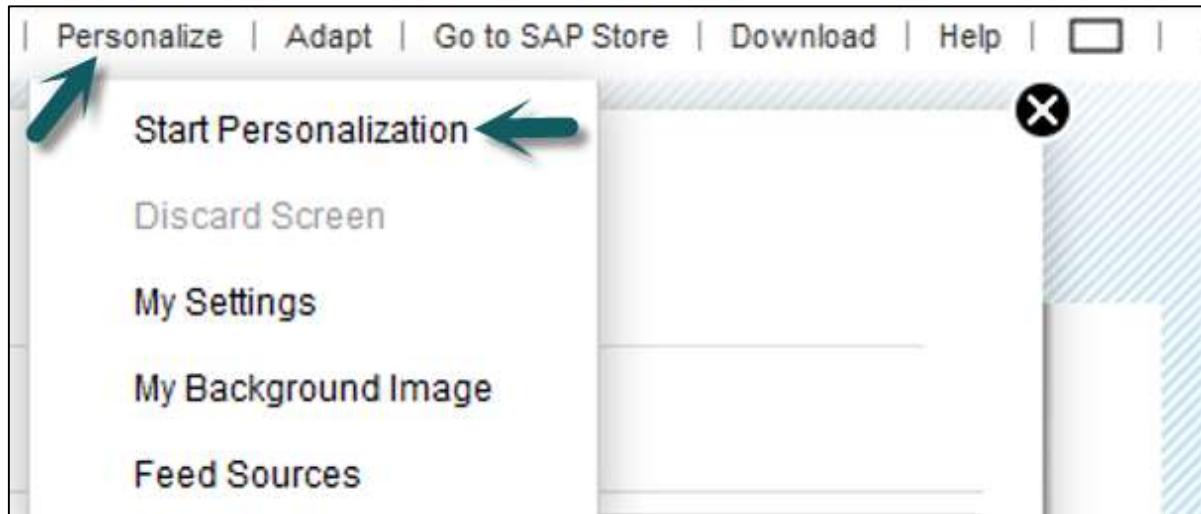


The following options are available under the Personalization tab-

- Start Personalization
- My Settings
- My Background image
- Feed Sources.

## Step 2

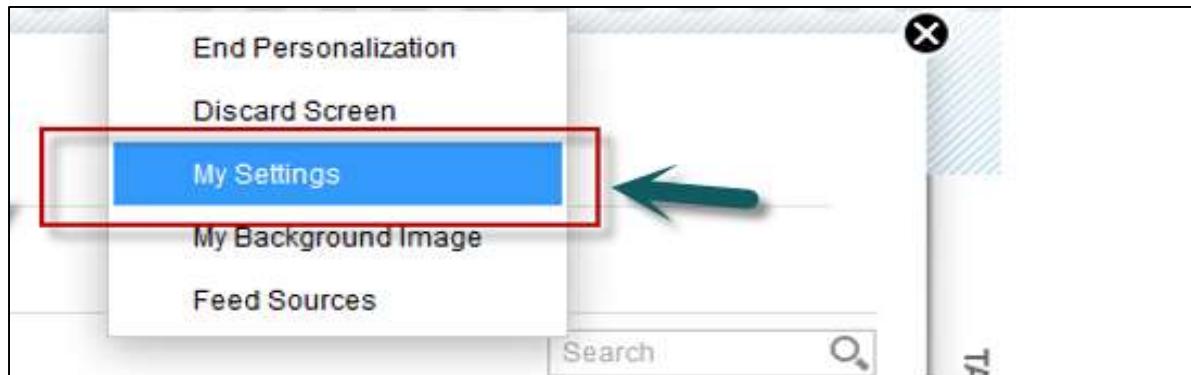
Select **Start personalization**.



You can see the personalization screen.

## Step 3

Go to **My Settings**; you can perform various personalization settings as per requirement.



## Step 4

Go to Regional Settings. You can personalize date formats, different decimal notation, different time zone, different time format, different languages as per your requirement.

My Settings

Save and Close | Save | Close | Change Password | Manage Certificates

After changing your settings, you must log off and then log on again for your changes to take effect.

Regional Settings		Onscreen Help	Accessibility
* Date Format:	MM/DD/YYYY		
* Decimal Notation:	1,234,567.89		
* Time Zone:	(UTC-08:00) Pacific Time (Los Ang		
* Time Format:	12-Hour Time		
* Language:	English		

## Step 5

Under the Onscreen Help tab, you can select Country. Country specific help will be activated and the help content can be seen in Help Center. A user can view these additional country specific help, if he has any issues.

Regional Settings | Onscreen Help | Accessibility

Display Additional Onsc...

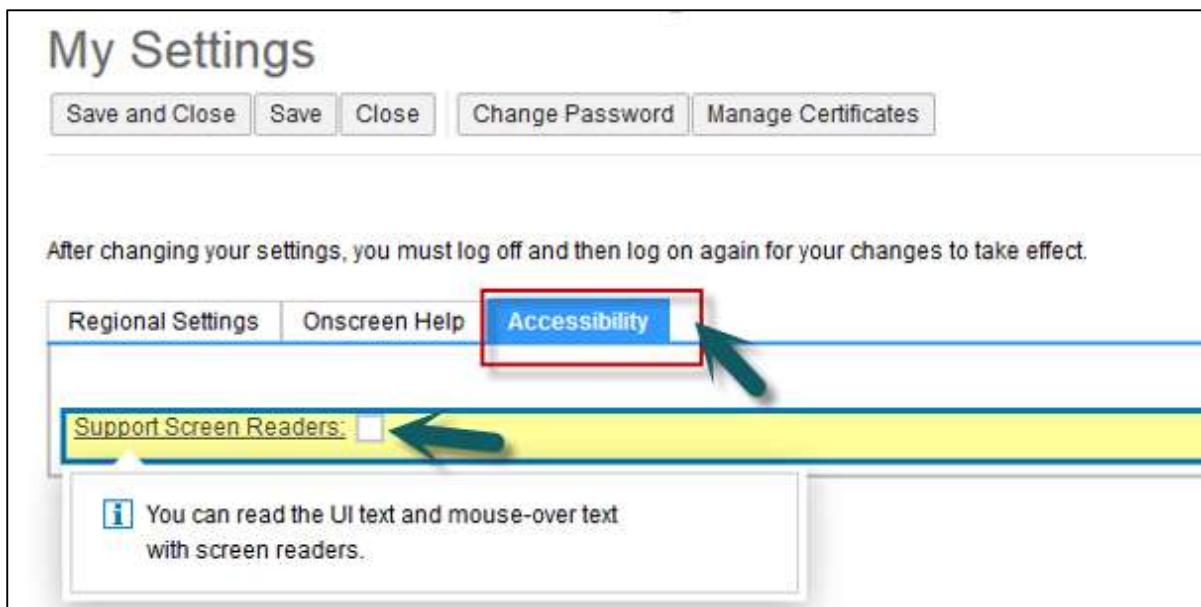
Country-Specific Help and Learning Content

To activate country-specific online help content, select a country. This help content can be viewed in the Help Center.

Country:

## Step 6

Under the Accessibility tab, check the support screen readers checkbox. It allows a user to read the User Interface (UI) text and mouse over text with screen readers.



## Step 7

You can change the password by clicking the **Change Password** command button under My Settings.



**Note:** All the personalization performed above, is usually done by the end-user on their HTML 5 screen. These personalization changes are on their screens only and do not reflect on any other user screen.

# 10. SAP C4C – Adaptation

In this chapter, we will learn Customization, done by C4C administrators in Silverlight UI screen. An administrator can restrict an end-user to personalize his/her screen and can personalize for all the users. This process is called **Adaptation**.

Adaptation refers to a set of tools, the administrators can use to add or modify fields, change master screen layouts, assign screen layouts to specific roles, restrict dropdown list values, and modify output forms. You can also migrate adaptation changes from one system to another C4C system.

The screen adaptation feature allows changes to the fields and screens that are displayed to all users in Cloud for Customer environment. This is an important feature. In case there is some critical business data that has to be captured, this feature can be used to show on the screens of all the users.

The following steps will guide you through the process of adaptation.

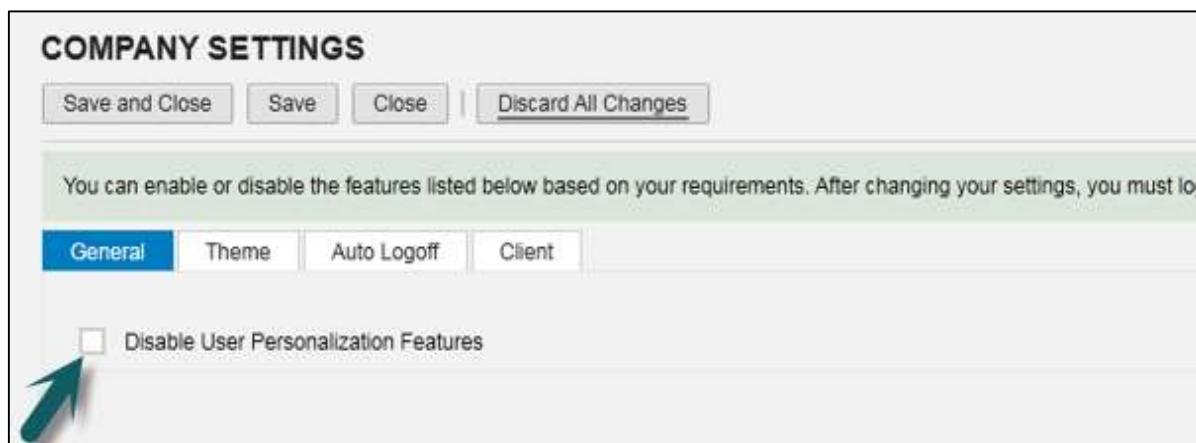
## Step 1

To perform Adaption in Silverlight UI, go to **Adapt -> Company Settings**.



## Step 2

Click the **General** tab. You can restrict individual users to personalize their screens. To restrict, select checkbox **Disable User Personalization Features**.



**COMPANY SETTINGS**

Save and Close | Save | Close | Discard All Changes

You can enable or disable the features listed below based on your requirements. After changing your settings, you must log off and then log on again for your changes to reflect.

General    Theme    Auto Logoff    Client

Disable User Personalization Features

### Step 3

Click the tab Theme. You can select the theme from drop down options and the theme that you will select will automatically reflect in all user profiles in the C4C environment.

**COMPANY SETTINGS**

Save and Close | Save | Close | Discard All Changes

You can enable or disable the features listed below based on your requirements. After changing your settings, you must log off and then log on again for your changes to reflect.

General   **Theme**   Auto Logoff   Client

You can change the appearance of the solution by selecting a different theme. All users may need to delete their browser history for the theme change to take effect.

Theme: Gold Reflection

Preview:

APPLICATION AND USE...

The screenshot shows the SAP Fiori interface with the 'Gold Reflection' theme applied, featuring a dark background and gold-colored UI elements.

### Step 4

Click Auto logoff. Under this tab, you can define the auto log off period from the drop down list when a user is inactive. For security reasons, users are automatically logged off from the system if they have been inactive in the system for a certain period of time. You can define the duration of the inactive time here.

In case you leave this option empty, by default, inactive users will be logged off the system after 1 hour.

**COMPANY SETTINGS**

Save and Close | Save | Close | Discard All Changes

You can enable or disable the features listed below based on your requirements. After changing your settings, you must log off and then log on again for your changes to reflect.

General   Theme   **Auto Logoff**   Client

For security reasons, users are automatically logged off of the system if they have been inactive in the system for a certain period of time. You can define the duration of the inactive time here. If you leave this option empty, inactive users will be logged off of the system after 1 hour.

Inactive users will be automatically logged off after:

15 minutes

30 minutes

1 hour

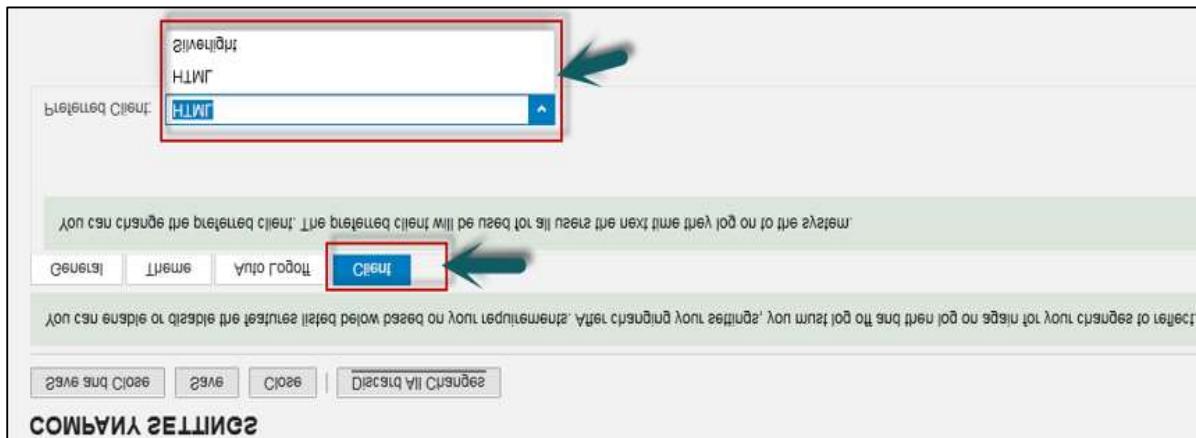
2 hours

3 hours

4 hours

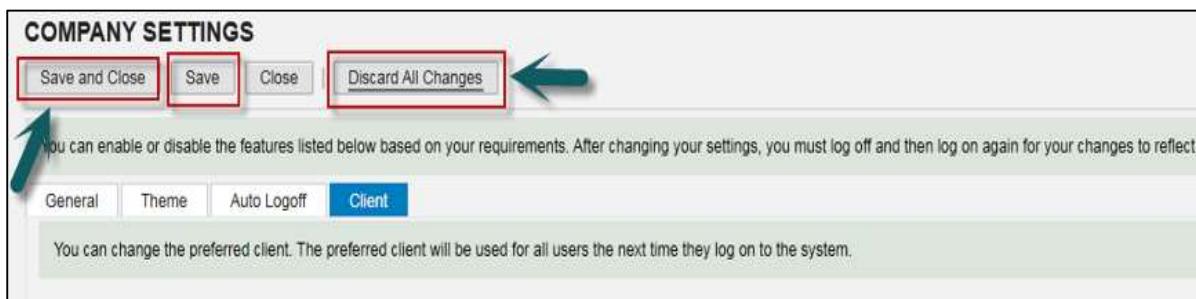
## Step 5

Click the next tab- **Client**. Select the preferred client between HTML and Silverlight. You can change the preferred client. The preferred client will be used for all users the next time they log on the system.



## Step 6

After all changes are done, select from the options- Save and Close, Save, Close, and Discard all changes as shown in the screen shot below-



## C4C Adaption – Extension Fields

Extension fields are additional fields that the administrators can add to the solution in order to meet a specific business requirement. If applicable, these features add new field to the end of the data migration worksheet.

When you first create an extension field, you navigate to a screen on which you want it to appear and add it to a section of the screen. Each screen section is based on an underlying business context. The business context typically corresponds to a part of a business document or other object. For example, the header data of sales quote. The business context is used to determine which other screens you can add the field to. In addition, it is also used to determine the form templates, analytical data sources and reports, enterprise search categories, and extension scenarios that the field can be added to.

To add a new field, first you need to navigate to the relevant screen and enter Adaptation mode via Adapt -> Edit Master Layout. The area of the screen is where the new field should be created, i.e., in the account details area.

The screenshot shows the SAP Cloud for Customer interface. On the left, there's a sidebar with various icons. The main area is titled 'CUSTOMER' and shows a profile picture of a soccer ball and the name 'Ben Marlow'. Below this is a section for 'GENERAL INFORMATION' with fields for Customer ID (1000542), Status (Active), Name (Ben Marlow), and Klout Score. The top navigation bar includes links for 'TICKETS', 'SOCIAL PROFILES', 'SOCIAL MEDIA MESSAGES', and 'OP'. A dropdown menu is open from the 'Adapt' link, with 'Edit Master Layout' highlighted in blue. The menu also contains other options like 'Edit Smartphone Layout', 'New Page Layout', etc.

ID	Description	Priority	Status	Source	Channel	Created
3508	Hi, My monarch	Low	Open	Social Media	Mon...	10/28/2013
3488	Please HELP !!!	Low	Open	Social Media	Mon...	10/25/2013
3487	Maybe, can you	Low	Open	Social Media	Mon...	10/25/2013
3470	I need to some	Low	Open	Social Media	Mon...	10/25/2013
3460	My phone is bro	Low	Open	Social Media	Mon...	10/25/2013
3458	NP: Public mes	Low	Open	Social Media	Mon...	10/25/2013
3455	your xyz product	Low	Open	Social Media	Mon...	10/25/2013

# 11. SAP C4C – Reporting

In SAP C4C, analytics data in the cloud solution is real time and there is no persistency in a separate Business Warehouse layer.

SAP C4C supports the following types of reporting.

- **Standard reports:** These are standard reports that are provided with C4C solution.
- **Custom reports:** This includes custom reports in C4C that are created as per business requirement.
- **Interactive Dashboards:** These are user-interactive dashboards that are created separately.

## SAP C4C – Standard Reports

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The reporting feature is integrated in C4C solution that allows you to support business processes and to check performance as per business KPIs. This helps you to make decisions with real time data.

### Report Analysis and Integration-

In C4C Cloud solution, you can insert data from reports into Microsoft Excel document. You can use logon to C4C environment on the ribbon and you can directly refresh the data in excel document including all subsequent activities in Cloud for customer environment.

To modify reports so that those changes apply to all users, you can make the change as an administrator by creating a new view or copy of a report via Business Analytics.

SAP C4C supports the following features in analytics-

- Microsoft Excel based analysis and formatting of reports
- Drilldown on iPad
- Mark reports as favorites
- Enable reports on smart devices

## SAP C4C – Custom Reports

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In SAP C4C, you can create custom reports based on custom fields in your solution and these custom fields can be added to data sources or reports.

You can join or combine heterogeneous data sources that are created in C4C environment or those that are delivered with the solution, as well as create custom calculated measures and comparison metrics.

## **Data Sources for Report Creation**

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The first step is in the report creation process through the Report wizard is to select a data source. In SAP C4C, various pre-defined data sources are provided with the solution. You can also create and edit your own data sources to suit your business requirements and processes and use your data sources for reporting.

To create your data sources, you can combine or join data sources to merge data into a new data source. You can also create a cloud data source by importing outside information.

## **Important Terms in Reporting**

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Following are the key terms used in reporting in SAP C4C:

### **Key Figures**

Key figures are defined as key performance indicators in the report. You can also refine the data appearing in key figures by setting up restricted or calculated key figures.

You can define a restricted key figure as key figure restricted to a specified characteristic value and is often created for comparison metrics.

In C4C reporting, a calculated key figure is defined as the key figure that contains some calculation rules or formulas. A calculated key figure can be created from existing key figures in the selected data source.

### **Characteristics**

These are assigned to restricted key figures and to add additional behavior you can define properties of the characteristics.

### **Work Centers**

You should assign the reports to work centers to make them available to users.

### **Assigning Reports to Roles**

You can also enable the assignment of reports to business roles when you implement a new project under fine tuning option. This allows you to assign reports to business roles directly and hence restricts by role which users can view the reports that are assigned in work center. To enable this: You can go to Administrator -> Analytics -> Settings

### **Report Views**

When you assign a report to the work center, you can create views, which appear in end-user report list. A view can be created by choosing key figures and characteristics for columns and rows in a table, then selecting a chart type to best represent that data.

When you create a view, you can also define conditions and exceptions for key figures that alter how your data is presented based on rules and thresholds.

# 12. SAP C4C – Creating a Custom Report

Many defaults are provided in SAP Cloud for Customer delivered solution. If these reports do not meet the requirement, you can also create custom reports by adding data fields from different sources.

## Create a Custom Report

Follow the steps given below to create a Custom Report.

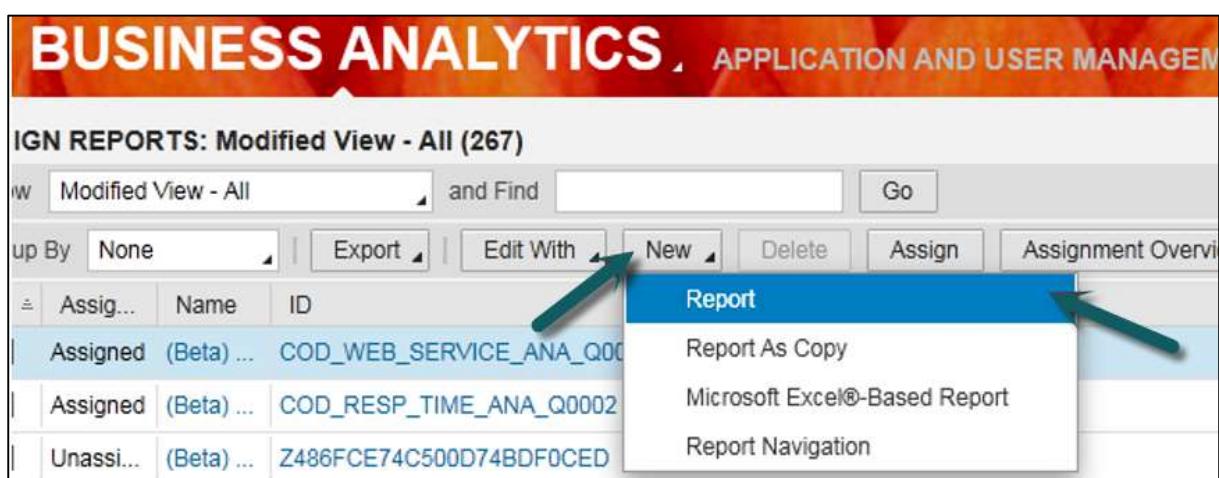
### Step 1

Go to **Business Analytics Work Center -> Design Reports**.



### Step 2

To create a new Report, Click **New** and select **Report**. There are other options like- **Report As Copy** which can be used to copy or modify an existing report.



It will open Report creation wizard. To create a report there are certain steps that has to be completed-

**NEW REPORT**

1 Define Report and Select Data Source\* 2 Select Key Figures 3 Select Characteristics 4 Characteristic Properties 5 Define Variables 6 Review 7 Confirmation\*

< Previous Next > Finish Cancel

To create a report, select a data source. In the following steps, you select and define key figures, characteristics, and variables. You can also decide if you want the report to be available for mobile devices or if you want a report without any key figures.

**REPORT**

\*Name:   
Description:

**DATA SOURCE**

\*Name:   
Description:   
Access Context:

**PROPERTIES**

Only for Master Data:

### Step 3

You have to enter the name and description of the new report.

**Example:** Let us say you want to create a report to analyze the service ticket created from different sources like Facebook, Twitter or via mail. Let us say name it as- ZTicket123.

Enter the description- Analyze the ticket creation from different sources like FB, twitter, email.

**NEW REPORT**

1 Define Report and Select Data Source\* 2 Select Key Figures 3 Select Characteristics 4 Characteristic Properties 5 Define Variables 6 Review 7 Confirmation\*

< Previous Next > Finish Cancel

To create a report, select a data source. In the following steps, you select and define key figures, characteristics, and variables. You can also decide if you want the report to be available for mobile devices or if you want a report without any key figures.

**REPORT**

\*Name: **Zticket123**  
Description: Analyze the ticket creation from differen sources like FB,twitter,email.

**DATA SOURCE**

\*Name:   
Description:   
Access Context:

**PROPERTIES**

Only for Master Data:

### Step 4

Select **Data Source**. You have to select the data source as per the requirement. Data source contains the fields that are required in report. To add data sources, you should have the knowledge of the data source you are using.

**DATA SOURCE**

\*Name:

Description:

Access Context:

**PROPERTIES**

Only for Master Data:

In this scenario, I have selected data source- **All Social Media Tickets** as it contains the fields that require in the report.

## Step 5

To select the data source, type 'ticket' and click **Go** -> All Social Media Tickets. Click **Next** at the top.

**NEW REPORT**

1 Define Report and Select Data Source > 2 Select Key Figures

To create a report, select a data source. In the following list, you can also define key figures.

**REPORT**

\*Name: ZTicket123  
Description: Analyze the ticket creation from different sources

**DATA SOURCE**

\*Name:   
Description:   
Access Context:

**PROPERTIES**

Only for Master Data:

**Select Data Source**

Find: \*ticket\* Go Advanced Show Technical ID

Data Source Name	Data Source Description	Object
All Phone calls with Predecessor Ticket	Shows all phone call activities that originate from a predecessor ticket.	<input type="checkbox"/>
All Tasks with Predecessor Ticket	Shows all activity tasks that originate directly from a predecessor ticket.	<input type="checkbox"/>
Ticket Backlog	Contains historical data on the quantities and types of tickets.	<input type="checkbox"/>
Tickets with Related Documents	Contains Tickets with related documents such as attachments or links.	<input type="checkbox"/>
All Social Media Inbound Tickets	Shows all tickets created by inbound origin via social media.	<input type="checkbox"/>
<b>All Social Media Tickets</b>	<b>Shows all tickets created by social media.</b>	<b><input checked="" type="checkbox"/></b>
Ticket History	Contains historical data on values of Tickets.	<input type="checkbox"/>
TicketHierarchy	Contains Main Ticket and its Sub-Tickets.	<input type="checkbox"/>
Ticket SMS	Contains all SMS for Tickets. It allows you to send and receive messages.	<input type="checkbox"/>
Ticket Time Points and Contact Party	Contains ticket data of main contact party.	<input type="checkbox"/>

## Step 6

Click **Select key figures**. You can use the check boxes to select the key figures as per requirement. Once you select the key figures, click **Next**.

**NEW REPORT**

1 Define Report and Select Data Source\* 2 Select Key Figures 3 Select Characteristics 4 Characteristic Properties 5 Define Variables 6 Review 7 Confirmation\*

< Previous Next > Finish Cancel

Select at least one key figure you want to show in the report. At most you can select one key figure group and multiple key figures.

Create Edit Delete Deselect All Show: Key Figures

Key Figure Group / Key Figure	Select
Initial Review Time (Secs)	<input checked="" type="checkbox"/>
Ticket Handling Time (Secs)	<input checked="" type="checkbox"/>
Counter	<input checked="" type="checkbox"/>

## Step 7

**Select Characteristics** can help you in selecting the characteristics as per the needs. These fields will be available in the report. You can select all or deselect all. Click Next.

**NEW REPORT**

1 Define Report and Select Data Source\* 2 Select Key Figures 3 Select Characteristics 4 Characteristic Properties 5 Define Variables 6 Review

< Previous Next > Finish Cancel

Select characteristics to be used in the report, in the selection area, or for restricting data.

Group By Dimension Deselect All

Selected	Characteristic Name	Dimension
<input checked="" type="checkbox"/>	Customer	Account
<input checked="" type="checkbox"/>	Created On	Created / Changed Information
<input checked="" type="checkbox"/>	Created By	Created / Changed Information
<input checked="" type="checkbox"/>	Changed On	Created / Changed Information
<input checked="" type="checkbox"/>	Changed By	Created / Changed Information
<input checked="" type="checkbox"/>	Creation Year and Week	Date and Time
<input checked="" type="checkbox"/>	Creation Year and Quarter	Date and Time
<input checked="" type="checkbox"/>	Creation Year and Month	Date and Time
<input checked="" type="checkbox"/>	Creation Year	Date and Time
<input checked="" type="checkbox"/>	Creation Weekday	Date and Time

## Step 8

The next step is to maintain the **Characteristic Properties**. Click Characteristic Properties. Characteristic Properties includes properties that you want to display in your report.

You can see four tabs for each property- **General, Display, Value Selection and Hierarchy**.

**NEW REPORT**

1 Define Report and Select Data Source\* 2 Select Key Figures 3 Select Characteristics 4 Characteristic Properties 5 Define Variables 6 Review 7 Confirmation\*

< Previous Next > Finish Cancel

For characteristics selected, maintain properties. Note that existing value selections for characteristics cannot be changed. By clicking Set Fixed Value Selections, you can set fixed value selections for characteristics available in the report. Note that the business user cannot change these value selections.

 Set Fixed Value Selections

Characteristic Name	Display in Report	Value Selection	Hierarchy	Rename Characteristic To:	Show Master Data Value
Social Media Message Creation Date	<input checked="" type="checkbox"/>	No Value Selection	No Hierarchy	<input type="checkbox"/>	<input type="checkbox"/>
Message Relevancy	<input checked="" type="checkbox"/>	No Value Selection	No Hierarchy	<input type="checkbox"/>	<input type="checkbox"/>
Social Media Message	<input checked="" type="checkbox"/>	No Value Selection	No Hierarchy	<input type="checkbox"/>	<input type="checkbox"/>
UUID	<input checked="" type="checkbox"/>	No Value Selection	No Hierarchy	<input type="checkbox"/>	<input type="checkbox"/>
Priority	<input checked="" type="checkbox"/>	No Value Selection	No Hierarchy	<input type="checkbox"/>	<input type="checkbox"/>
Status	<input checked="" type="checkbox"/>	No Value Selection	No Hierarchy	<input type="checkbox"/>	<input type="checkbox"/>
Service Category	<input checked="" type="checkbox"/>	No Value Selection	No Hierarchy	<input type="checkbox"/>	<input type="checkbox"/>
Description	<input checked="" type="checkbox"/>	No Value Selection	No Hierarchy	<input type="checkbox"/>	<input type="checkbox"/>

Details: Social Media Message Creation Date

General Display Value Selection **Hierarchy** 

Fixed Value Selection  No Value Selection  Using Variable

Once you select the property, click **Next**.

## Step 9

Click **Define Variables**. Enter the variable values. If you select variable value selection for any of the property, you need to define variable in this step. Click **Next**.

**NEW REPORT**

1 Define Report and Select Data Source\* 2 Select Key Figures 3 Select Characteristics 4 Characteristic Properties 5 Define Variables 6 Review 7 Confirmation\*

< Previous Next > Finish Cancel

For the variables available, maintain properties. You can change the sequence in which variables appear in the selection area, hide, or rename them. You can also change the variable properties and default value selections. Note that the business user can change these value selections unless you hide the variable.

 Maintain Default Values

Variable Name	Hide	Rename Variable To	Mandatory	Selection Type	Default Value
No records found					

## Step 10

Under **Review** tab, you can review all the fields that are defined for report creation. You can see a summary of key figures, characteristics and properties and any variable values that have been selected in previous steps.

You can also view Data source details- like data source name and description.

Select Key Figures group. Once you review all the fields, click **Finish**.

**NEW REPORT**

1 Define Report and Select Data Source\* 2 Select Key Figures 3 Select Characteristics 4 Characteristic Properties 5 Define Variables 6 Review 7 Confirmation\*

< Previous Next > Finish Cancel

**1 - Report and Data Source Details**

**REPORT**

Name: ZTicket123  
Description: Analyze the ticket creation from different sources like FB, twitter, email.

**DATA SOURCE**

Name: SEODSRQTIMEB02 All Social Media Tickets  
Access Context:

**PROPERTIES**

Only for Master Data: No

[Back to Step 1](#)

**2 - Key Figure Group**

**KEY FIGURE GROUP**

Key Figure Group Type: Key Figure Group  
Key Figure Group:

**Key Figures**

- Key Figure Group / Key Figure
- Initial Review Time (Secs)
- Ticket Handling Time (Secs)
- Counter

## Step 11

Under the Confirmation tab, you will get the confirmation that the report is created. Click **Close**. You also get different options to create a new report, assign view to this report, etc.

**ZTICKET123**

1 Define Report and Select Data Source\* 2 Select Key Figures 3 Select Characteristics 4 Characteristic Properties 5 Define Variables 6 Review 7 Confirmation\*

< Previous Next > Finish Close

**WHAT DO YOU WANT TO DO NEXT?**

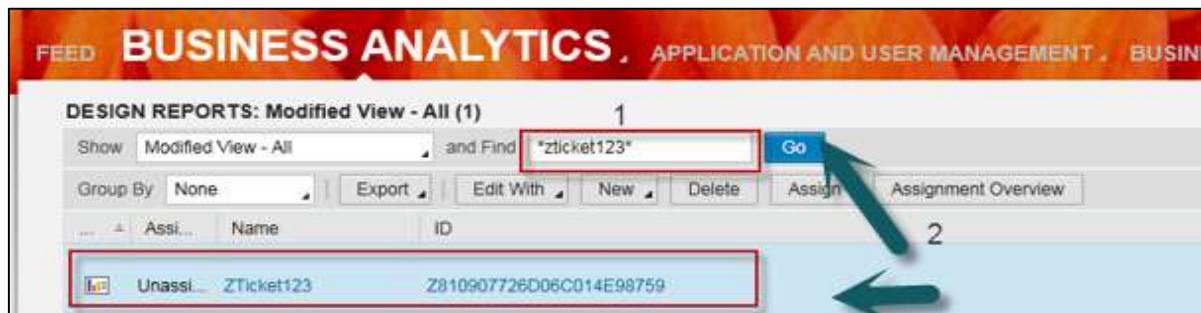
- Create View for this Report in a Web Browser
- Create Another Report
- Assign Report
- Edit this Report with Report Wizard

## View Created Report

To search for a report, follow the steps given below.

### Step 1

Go to **Business Analytics -> Enter the Report Name -> Go.**



### Step 2

Select the report that you have created. On the left side, you can see the following fields-

- Columns:** It shows the Key figures that you have selected.
- Rows:** It shows the fields that we have required.

The screenshot shows the SAP Business Analytics report editor for "ZTICKET123". On the left, there's a sidebar titled "Columns and Rows" with sections for "Columns" (highlighted with a red box) and "Rows" (highlighted with a red box). A green arrow points from the "Rows" section towards the main content area. The main area is titled "Selection" and contains a table with three columns: "Initial Review Time (Secs)", "Ticket Handling Time (Secs)", and "Counter". The table shows the values: 377,072,559.00, 377,082,045.00, and 25,227 respectively. At the bottom of the sidebar, there's a section titled "Not Currently Shown" which lists various fields like "Agent Name", "Category Code", etc., each with a small arrow icon indicating they can be moved.

### Step 3

Select **Not Currently Shown**. It shows all the fields that you have selected under characteristics at the time of report creation and you can select fields, which you require in the report. Drag those fields to the rows. To move any field you can drag or click the arrow at the corner of each field and select **Move to Rows**.

Service Category	Initial Review Time (Secs)	Ticket Handling Time (Secs)	Counter
Service Level ID	377,072,559.00	377,082,045.00	25,227
Social Media C...			
Social Media C...			
Social Media M...			
Social Media M...			
Status			
Ticket			
Ticket First Re...			
<b>Ticket ID</b>			
UUID	<b>Move to Columns</b>		
Unit	<b>Move to Rows</b>		

## Step 4

Once you add all the characteristics under rows, you can view the report.

Ticket ID	Initial Review Time (Secs)	Ticket Handling Time (Secs)	Counter
BENEFITS OF CLOUD COMPUTING: -- Achieve economies of scale	3764	1.00	1
____ Stock fuel levels ~ Check and replenish your propane o	19156	0.00	1
_____ fuel that is used today is a chemical form of solar	22674	0.00	1
_____ Amazon US: http://amzn.to/1b	9691	0.00	1
_____ Amazon US: http://amzn.to/1b	10087	0.00	1
_____ Amazon US: http://amzn.to/1b	10213	0.00	1
_____ Amazon US: http://amzn.to/1b	10603	0.00	1
_____ Amazon US: http://amzn.to/1b	17567	0.00	1
_____ Amazon US: http://amzn.to/1b	17987	0.00	1
_primarily_for_SUVs_and_trucksTube_has_innovative_stepped_de	9356	0.00	1
-- Trades Stocks Traded Volume % 121 13,345 Last Trade Type	31516	0.00	1
-3 Yrs Ito Registration - 1 Yr Comprehensive Insurance with	9916	0.00	1

## Step 5

To assign a report to the work center, select the report and click **Assign**.

DESIGN REPORTS: Modified View - All (1)

Show Modified View - All and Find \*zticket123\* Go

Group By None Export Edit With New Delete Assign Assignment Overview

... Assi... Name ID

Unassi... ZTicket123 Z810907726D06C014E98759

# 13. SAP C4C – Data Sources

When standard data sources are not able to fulfill your reporting requirements, you can create custom data sources in C4C cloud environment.

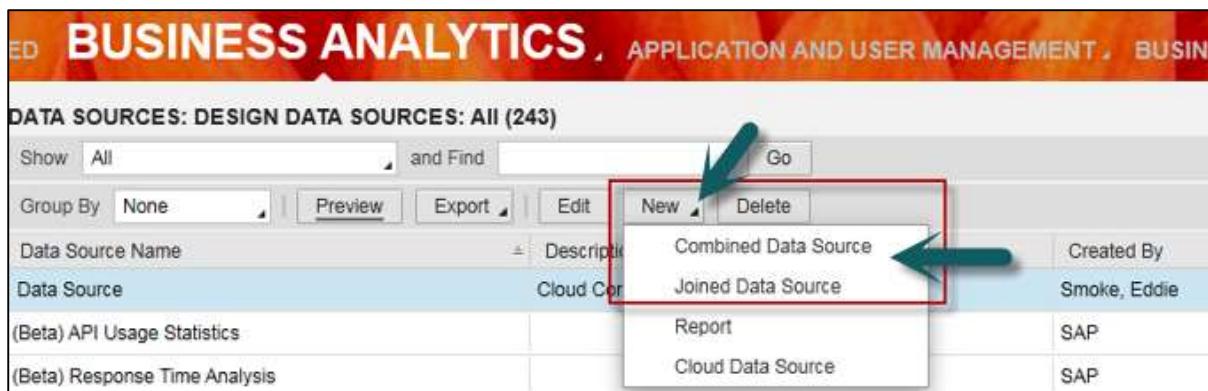
There are two methods to create custom data source-

- Combined Data source.
- Joined Data Source.

Go to **Business Analytics -> Data sources -> Design Data Sources**



When you click **New**, you can select the type of data source you want to create.



**Note:** Combined Data Sources only merge data from different data sources and it does not check without checking for any matches between the Data Sources.

Joined Data Sources allows you to merge the data between two or more data sources and merging results the matching of data.

# 14. SAP C4C – Service Level

In SAP Cloud for Customer, service level defines the time when a ticket for a customer must be responded and completed. Service levels help the organizations define performance objectives for handling customer messages. Using these, you can measure the performance and the quality of your customer service.

Service levels also help to define new rules as per the ticket category and description whenever a new customer message comes in the C4C system. Using service levels, a system can determine the service level based on those rules, and then based on that service level, the initial response and completion due time points are calculated.

## Create a Service Level

---

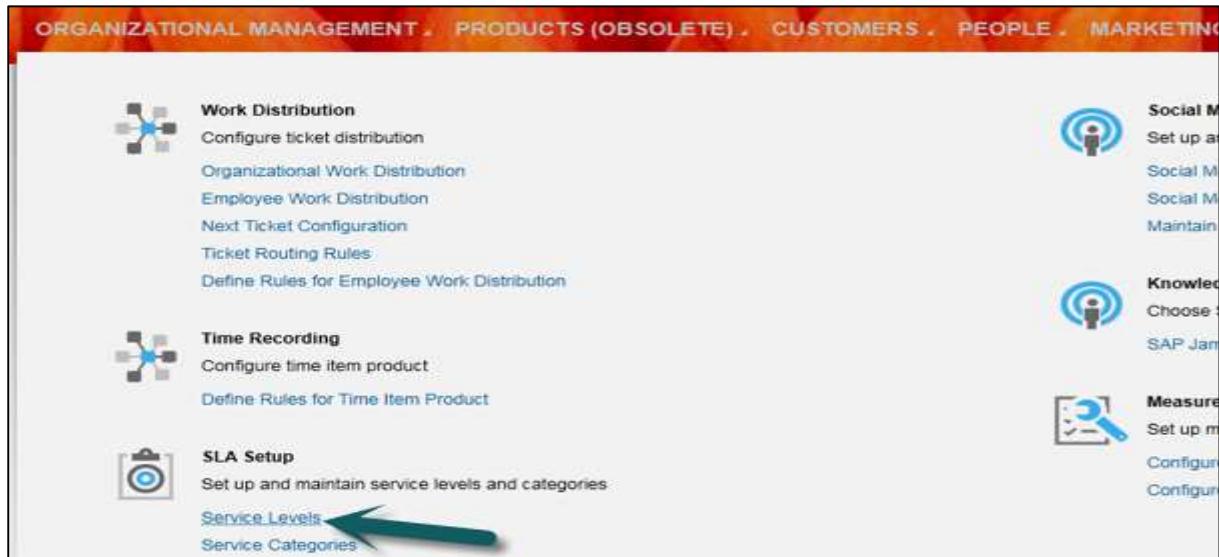
### Step 1

To define Service Levels, go to **Administrator -> Service and Social**.



## Step 2

Click **Service Level** in the next window that opens.



## Step 3

Click **New** and select **Service Level**.

Service Levels			
Show	Active Service Levels	and Find	Go
Edit	New	Export	Delete
Status	Service Level	Service Level ID	Service Level Name
Active	T22		SLA for tickets
Active	1144		wishfull

A new window will open.

## Step 4

Click the **General** tab. Enter the Service level Name, Service Level ID and Description.

To create a new service level, you must provide a Service Level Name, and a Service Level ID. You can also provide an optional service level Description.

**NEW SERVICE LEVEL**

Save | Close

**GENERAL** REACTION TIMES OPERATING HOURS CHANGES

To create a new service level, you must provide a Service Level Name, and a Service Level ID. You can also provide an optional service level Description.

*Service Level Name:	Test11	*Service Level ID:	Test11
Status:	In Preparation	Changed By:	
Created By:		Changed On:	
Created On:			
Description:	Test Service Level		

## Step 5

Navigate to the next tab **REACTION TIMES**. In this section, you define the time when service agent responds to the ticket.

This time depends on SLAs (Service Level Agreement) signed with the customer and also with ticket priority and type of customer.

**Example:** High priority ticket will have low response time or high-end customers have low response time. It means, ticket related to these customers will respond fast as compared to other ticket.

To create a milestone, click **Add Row** and choose the type of milestone. Select **Alert When Overdue** if you want the system to send an automatic alert to the responsible person when the **target milestone-time** point is exceeded.

Click **Add Row**. Select the milestone as per business requirement and click **Alert When Overdue**.

When you select this option, the system will send an alert to the service agent. Select the required milestones.

**NEW SERVICE LEVEL**

Save | Close

**GENERAL** **REACTION TIMES** OPERATING HOURS CHANGES

Milestones

To create a milestone, click Add Row and choose the type of milestone. Select Alert When Overdue if you want the system to send an automatic alert to the responsible person when the target milestone time point is exceeded.

Add Row	Remove		Recurring	Alert When Overdue
* Milestone			<input type="checkbox"/>	<input checked="" type="checkbox"/>
Due Date for Initial Review			<input type="checkbox"/>	<input checked="" type="checkbox"/>
Due Date for Response			<input type="checkbox"/>	<input checked="" type="checkbox"/>
Due Date for Resolution			<input type="checkbox"/>	<input checked="" type="checkbox"/>
Due Date for Completion			<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Details for Milestone**

To assign a service to the selected milestone (in the Milestones table), click Add Row then choose the Type of Service, the Priority, and enter the timer (Net Labor Time) duration. Add a row for all available priorities for each type of service selected.

Type of Service	Priority	Net Labor Time
Ticket - Response	Normal	3 Minute(s)
Ticket - Response	Urgent	2 Minute(s)

To enter the reaction time for all milestones, go to **Details for milestone -> Add Row**. Repeat this process for all the above milestones. Select the milestones one by one and then enter the reaction time for these milestones.

To assign a service to the selected milestone (in the Milestones table) click **Add Row**. Choose the Type of Service, the Priority, and enter the timer (Net Labor Time) duration. Add a row for all the available priorities for each type of service selected.

Type of Service	Priority	Net Labor Time
Ticket - Initial Review	Immediate	10 Minute(s)
Ticket - Initial Review	Normal	5 Minute(s)

## Step 6

Navigate to **Operating Hours** tab. Operation hour is the working hour of the service agent, i.e., from what time to what time an agent is available.

Select the working day calendar. Enter the days of week of working of a service agent. Click **Add Row** and then select the checkboxes for the required days of week. Enter the time ranges.

Click Add Row and enter the start time and the end time of the working hours of the service agent.

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

9:00 AM	6:00 PM
---------	---------

## Step 7

Navigate to the **Changes** tab. You can see all the changes that you made in the SLA over the time. Select different available criteria and click **Go**.

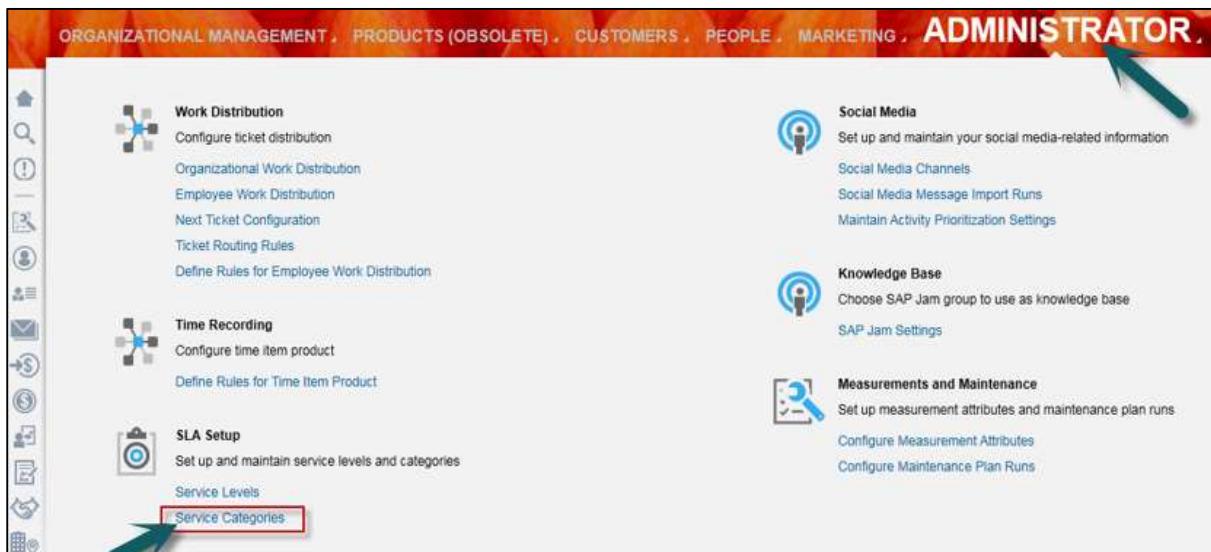
To display or refresh the change history, specify the required filter criteria and click **Go**.

The screenshot shows the 'NEW SERVICE LEVEL' interface. At the top, there are 'Save' and 'Close' buttons. Below them is a navigation bar with tabs: GENERAL, REACTION TIMES, OPERATING HOURS, and CHANGES. The CHANGES tab is currently selected. A message below the tabs reads: 'To display or refresh the change history, specify the required filter criteria and click Go.' Underneath this message, there are three dropdown menus labeled 'Changes Made From', 'Changes Made To', and 'Attribute'. The 'Attribute' dropdown is highlighted with a red box. To the right of these dropdowns is a 'Changed By User:' input field with a small icon next to it. Below the dropdowns are 'Go' and 'Reset' buttons. At the bottom of the screen, there are three columns: 'Change Date/Time', 'Changed By', and 'User ID'. The message 'No records found' is displayed in the center of the bottom section.

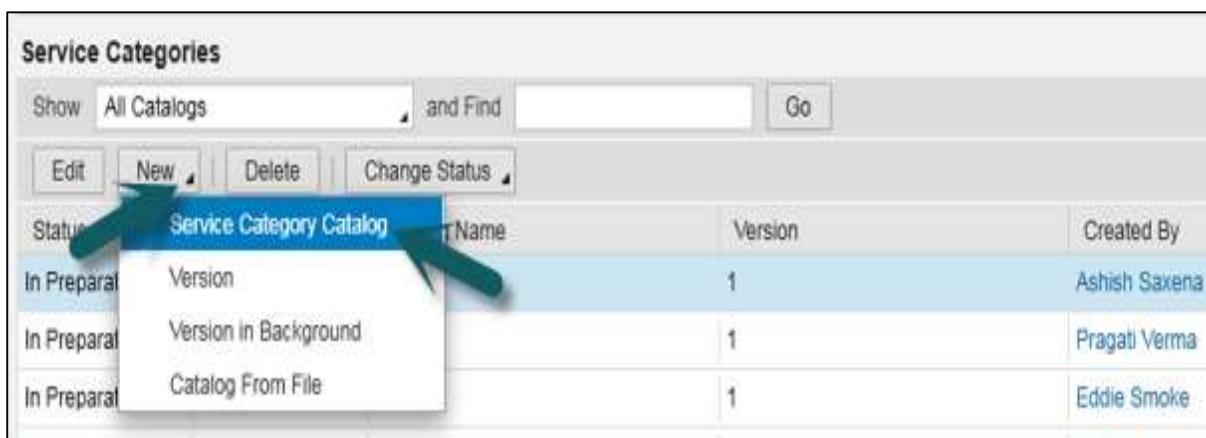
# 15. SAP C4C – Service Category

Service categories allows you to create and organize service categories and incident categories within service category catalogs. These categories are used throughout the system to capture consistent information, to allow reporting and benchmarking, and determining service level assignments.

To maintain Service Category, go to **Administrator -> Service and Social -> Service Categories**



A new window opens. Go to New and select **Service Category Catalog**.



# 16. SAP C4C – User Management

In SAP C4C, user management deals with maintaining the employee records in a system and creation of users and business roles. As per the business roles, you can assign different access rights and data restrictions to the users.

## Create an Employee

To create an employee in the C4C system, follow the steps given below.

### Step 1

Open Silverlight UI, Go to **Administrator** -> click **Employees**.



A new window opens.

### Step 2

To create a new employee, click **New -> Employee**.



### Step 3

Enter all the fields in **Employee** like name, gender, preferred language, validity, Organizational data, Address etc.

**NEW EMPLOYEE**

Save and Close | Save | Close

**Employee Image**

**EMPLOYEE**

Employee ID:	Mr.
Title:	Sam
Academic Title:	Mathew
* First Name:	English
* Last Name:	Male
Language:	Unlimited
Additional Name Fields	
Gender:	Male
*Valid To:	
Gram Panchayat:	
Panchayat At:	

**ORGANIZATIONAL DATA**

Department:	TEST_SALES - TEST_SALES
Job:	SALESMANAGER - Sales Manager
Manager:	

**USER DETAILS**

User: No  
User Locked: No

**Sales Data**

Add Row | Remove | Sales Organization

**IN-HOUSE ADDRESS**

*Country:	IN - India
House Number:	a
Street:	1st
City:	Delhi
State:	30 - Delhi
* Postal Code:	110001
Additional Fields	
Building:	
Floor:	

**IN-HOUSE COMMUNICATION**

Phone:	
Mobile:	
E-Mail:	
Fax:	
In-House Mail:	

## Step 4

Click **Save**.

**NEW EMPLOYEE**

Save and Close | **Save** | Close

**ORGANIZATIONAL DATA**

Department:	TEST_SALES - TEST_SALES
Job:	SALESMANAGER - Sales Manager
Manager:	

**Sales Data**

Add Row | Remove | Sales Organization

Company Name:

# 17. SAP C4C – Business Roles

You can create business roles and assign them to work centers to perform their job functions. To help standardize system access, business roles can be created. This enables you to predefine access rights in the form of a template, so that you can assign them to multiple business users, who perform similar business tasks.

## Create Business Roles

Follow the steps to create business roles.

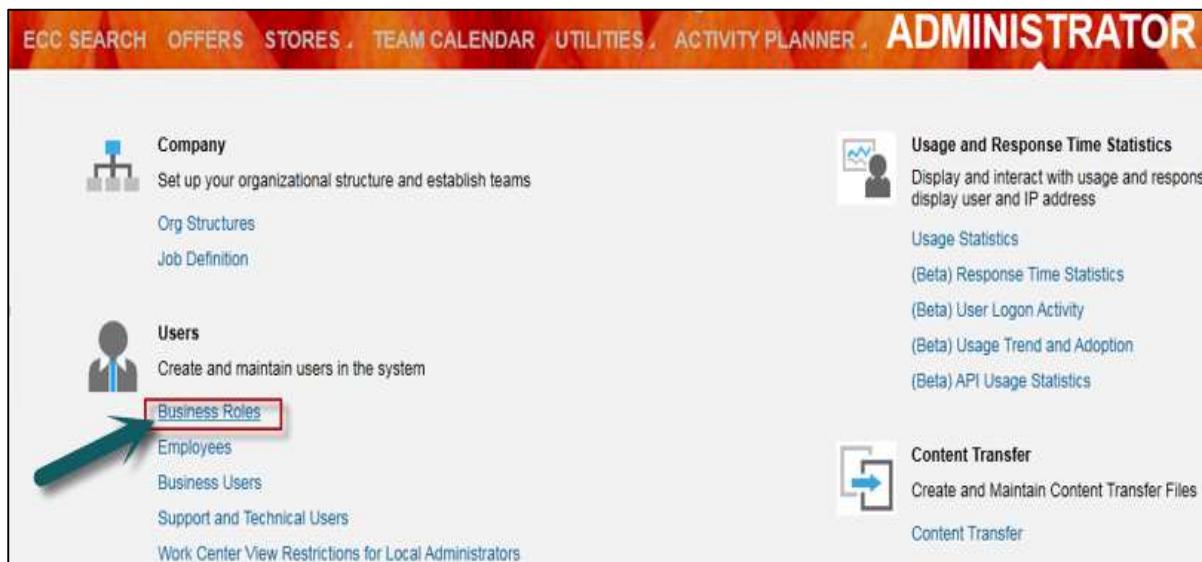
### Step 1

To create Business roles in C4C system, go to **Administration -> General Settings**.



### Step 2

Click **Business Roles**.



### Step 3

Click **New**. Select **Business Roles**.

Status	Business Role Name
Active	Crm Ops
Active	Marketing Manager
Active	Partner Contact
Active	Partner Manager

### Step 4

Enter all the required fields like Business Role ID, Business Role Name, and Description etc.

<b>GENERAL</b>	<b>WORK CENTER AND VIEW ASSIGNMENTS</b>	<b>ACCESS RESTRICTIONS</b>	<b>UI SWITCHES</b>
*Business Role ID: TEST Business Role Name: Test Buisiness Role Description: Test Buisiness Role			
Scope: Select Scope Manually: <input type="checkbox"/>			
<b>Users Responsible</b> Add Row   Remove User ID   Employee ID			

### Step 5

Click **Work center and View assignments**, select work centers as per the requirement.

Assign the required work centers and work center views to the business role. When you have finished the assignment, check whether the access rights are consistent and ensure that there are no conflicts of assignments with segregation of duties.

**BUSINESS ROLE: TEST - TEST BUISNESS ROLE**

Status: In Preparation    Obsolete: No

Save | Close | Copy | Assigned Users | Actions

**GENERAL WORK CENTER AND VIEW ASSIGNMENTS ACCESS RESTRICTIONS UI SWITCHES FIELDS & ACTIONS ASSIGNED BUSINESS USERS CHANGES**

Assign the required work centers and work center views to the business role. When you have finished the assignment, check whether the access rights are consistent and ensure that there are no conflicts of assignments with segregation of duties.

**Available Work Centers and Views**

Expand All | Collapse All | Find

Work Center/View ID	Work Center/View Name	Assigned	Segrega...
ADMINWCF	(Beta) Administration	<input type="checkbox"/>	
PRODUCT_WC_AFS	(OBSOLETE)AFS Product List	<input type="checkbox"/>	
COD_ACTIVITIES	Activities	<input type="checkbox"/>	
ACTIVITYWORKLIST	Activity Planner	<input type="checkbox"/>	
SEODADMINWCF	Administrator	<input type="checkbox"/>	
COD_ANALYSIS	Analysis	<input type="checkbox"/>	
ITS_APPLICATIONUSERMANAGEMENT	Application and User Management	<input type="checkbox"/>	
Y3V5K273Y001BONUSPLAN_WCF.WCF	Bonusplan	<input type="checkbox"/>	
ANA_BUSINESSANALYTICS	Business Analytics	<input type="checkbox"/>	
BC_BUSINESSCONFIGURATION	Business Configuration	<input type="checkbox"/>	
BUSINESSPARTNERS_WCF	Business Partners	<input type="checkbox"/>	

**Available Work Centers and Views**

Expand All | Collapse All | Find

Work Center/View ID	Work Center/View Name	Assigned	Segrega...
ADMINWCF	(Beta) Administration	<input checked="" type="checkbox"/>	
PRODUCT_WC_AFS	(OBSOLETE)AFS Product List	<input type="checkbox"/>	
COD_ACTIVITIES	Activities	<input type="checkbox"/>	
ACTIVITYWORKLIST	Activity Planner	<input type="checkbox"/>	
SEODADMINWCF	Administrator	<input type="checkbox"/>	
COD_ANALYSIS	Analysis	<input type="checkbox"/>	
ITS_APPLICATIONUSERMANAGEMENT	Application and User Management	<input type="checkbox"/>	
Y3V5K273Y001BONUSPLAN_WCF.WCF	Bonusplan	<input checked="" type="checkbox"/>	
ANA_BUSINESSANALYTICS	Business Analytics	<input checked="" type="checkbox"/>	
BC_BUSINESSCONFIGURATION	Business Configuration	<input type="checkbox"/>	
BUSINESSPARTNERS_WCF	Business Partners	<input type="checkbox"/>	

## Step 6

Navigate to access restrictions, enter values for read access and write access. You can restrict the read and write access for a work center view. By defining the read and write access, you also define the access rights for all work items that are assigned to the access context of the work center view.

Work Center View	Work Center ID	Work Center Name	Access Context	Read Access	Write Access	
ADMGENWCF	IT Setup	ADMINWCF	(Beta) Administration	2008 - Org. Unit	Restricted	Restricted
ADMOPSWCV	Operations	ADMINWCF	(Beta) Administration	2008 - Org. Unit	Unrestricted	Unrestricted
ADMALMKTW...	Sales and Mark...	ADMINWCF	(Beta) Administration	NONE	Unrestricted	Unrestricted
ADMSECWCV	Security	ADMINWCF	(Beta) Administration	2008 - Org. Unit	Unrestricted	Unrestricted
SEODSOCIAL...	Service and Social	ADMINWCF	(Beta) Administration	NONE	Unrestricted	Unrestricted
Y3V5K273Y_1...	Bonusplan View	Y3V5K273Y001BONUSPLAN_WCF.WCF	Bonusplan	NONE	Unrestricted	Unrestricted
ANA_KUA_BS	Broadcasts	ANA_BUSINESSANALYTICS	Business Analytics	NONE	Unrestricted	Unrestricted
ANA_DESIGN_...	Design Data So...	ANA_BUSINESSANALYTICS	Business Analytics	NONE	Unrestricted	Unrestricted
ANA_KUA_KF...	Design Key Figu...	ANA_BUSINESSANALYTICS	Business Analytics	NONE	Unrestricted	Unrestricted
ANA_KUA_KPI ...	Design KPI	ANA_BUSINESSANALYTICS	Business Analytics	NONE	Unrestricted	Unrestricted

## Step 7

Navigate to **UI Switches**. UI switches are defined by custom development and can be used to make fields, buttons, or sections of user interfaces hidden, read-only, or mandatory. You can assign any UI switches that have been developed to the business role here. Using UI switches enables you to assign a particular version of a UI to the business role, and in turn, to the users to whom the business role is assigned.

* Identifier	Name

## Step 8

Navigate to **Fields & Actions**. If you want to make certain fields read only or hidden for a user, you can make these settings here and then assign a business role to the user. In the same way, you can also disable certain actions for a user.

Status: In Preparation Obsolete: No

Save Close Copy Assigned Users Actions

GENERAL WORK CENTER AND VIEW ASSIGNMENTS ACCESS RESTRICTIONS UI SWITCHES FIELDS & ACTIONS ASSIGNED BUSINESS

If you want to make certain fields read only or hidden for a user, you can make these settings here and then assign the business role to the user. In the same way, you can also disable o

**Business Field Restrictions**

Add Row Remove

Name	Business Context	UI Text	Access Rest

**Extension Field Restrictions**

Add Row Remove

Name	Business Context	Access Restriction

## Step 9

Click **Action** and select **Activate**. Click **Save**.

**BUSINESS ROLE:** -

Status: In Preparation Obsolete: No

Save Close Copy Assigned Users Actions

GENERAL WORK CENTER AND VIEW ASSIGNMENTS

To display or refresh the change history, specify the require

Changes Made From:

UI SWITCHES FIELDS & ACTION

Changed By User:

- Activate
- Set to Obsolete
- Undo Obsolete
- Check Access Rights Consistency

After creating the template, you can directly assign it to the user or copy the access rights directly from an already existing user. The specified Work Center and views will be automatically populated.

This is a time-saving and an easy way to cope with a large number of users.

# 18. SAP C4C – Work Distribution

In SAP C4C, work distribution is used to route the tickets to particular teams or agent queues. By default, all incoming customer service tickets are visible to all business users with the corresponding access rights.

**Organizational Work Distribution** and **Employee Work Distribution** enable you to manage the distribution of customer tickets within your service organization. You create rules that allow the system to evaluate the tickets and distribute them to the responsible team or the responsible processing agent.

You can manage the distribution of work within your organization by creating work distribution rules that allow the system to evaluate work items and to determine the organization unit responsible for these work items. Depending on the work category, the system directs the work items to the determined organization unit, or provides the organization unit as a proposal in the relevant business document.

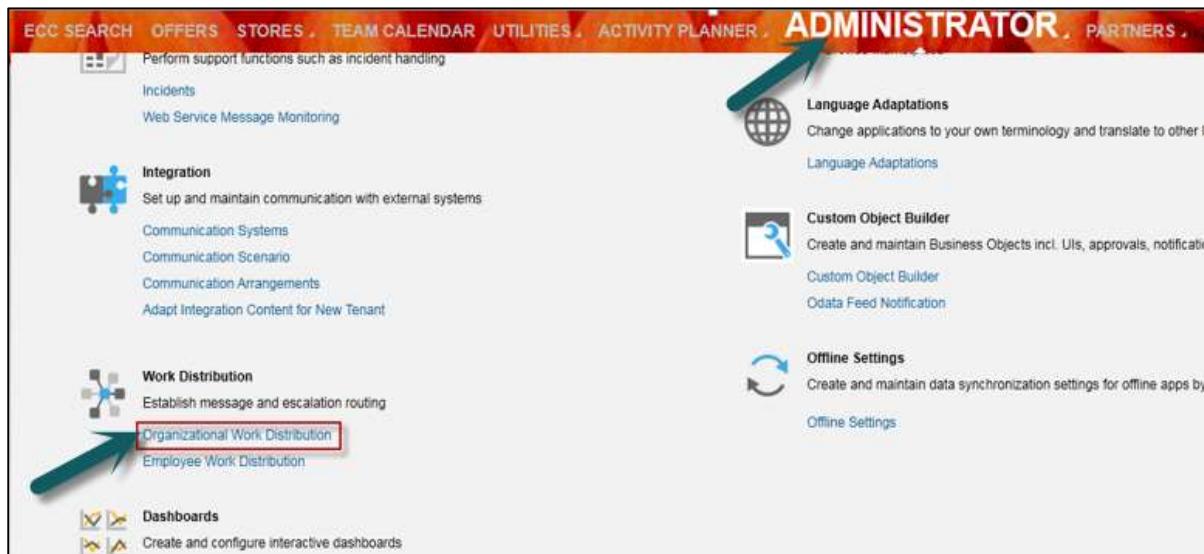
For each work category listed below, you can create one or more rules. If you do not create any rules for a given work category, all corresponding work items are subject to the global work assignment. You can find additional details about each work category in the related document in the Help Center.

## Create Work Distribution

Following are the steps to perform work distribution.

### Step 1

To perform work distribution, go to Administration -> Organization Work Distribution



## Step 2

Navigate to Service and support team for service requests - Social Media. You can do organizational work distribution for service and support team for service request ticket from social media channel.

You can also perform Organizational work distribution for sales unit for sales transaction and leads for marketing unit.

**Overview of Organizational Work Distribution**

Effective Date:  Show Future Work Distribution: Yes Go

You can manage the distribution of work within your organization by creating work distribution rules that allow the system to evaluate work items and to work category, the system directs the work items to the determined org unit, or provides the org unit as a proposal in the relevant business document. If not create any rules for a given work category, all corresponding work items are subject to the global work assignment. You can find additional details at [Work Distribution Rules](#).

Group By	Business Area	Edit	Show Excluded Org Units	Actions						
	Work Category			Work Dis						
<ul style="list-style-type: none"> <li>▲ Business Area: Sales and Marketing (2)           <table border="1"> <tr> <td>Sales Unit for Sales</td> <td>Global Work Assignment</td> </tr> <tr> <td>Marketing Unit for Leads</td> <td>Global Work Assignment</td> </tr> </table> </li> <li>▲ Business Area: Service and Support (1)           <table border="1"> <tr> <td>Service and Support Team for Service Requests - Social Media</td> <td>Defined Work Assignment</td> </tr> </table> </li> </ul>					Sales Unit for Sales	Global Work Assignment	Marketing Unit for Leads	Global Work Assignment	Service and Support Team for Service Requests - Social Media	Defined Work Assignment
Sales Unit for Sales	Global Work Assignment									
Marketing Unit for Leads	Global Work Assignment									
Service and Support Team for Service Requests - Social Media	Defined Work Assignment									
Details:										

The table shows the work distribution for the selected work category. The work is assigned to each organization unit based on a prioritized list of rules. The priority allows the system to evaluate the rules from 1 to N to determine a first match whenever a work item needs to be assigned to an organization unit. This first match is only returned. The system does not evaluate beyond the first match.

Business Area: Service and Support (1)						
Service and Support Team for Service Requests - Social Media				Defined Work Assignment		
Details: Service and Support Team for Service Requests - Social Media						
<b>Work Distribution Rules</b>						
The table shows the work distribution for the selected work category. The work is assigned to each org unit based on a prioritized list of rules. The priority allows the system to evaluate the rules from 1 to N to determine a first match whenever a work item needs to be assigned to an org unit. This first match is only returned. The system does not evaluate beyond the first match.						
Priority / Rules	Parameter	Details	Org Unit Responsible	Valid From	Valid To	Last Changed By
1 B2B_Level_1_Support	Customer Category	All	S3110 - Level 1 Support Queue	11/22/2012	06/25/2013	Eddie Smoke
	Country	All				
	Product Category	All				
	Service Category	All				
	Service Priority Code	All				
	Escalation Status	All				
	Channel Type	All				
	Channel	All				
2 B2B_Escalations	Customer Category	All	S3120 - Bikaner Division	06/26/2013	10/14/2014	Ashish Saxena
	Country	All				

### Step 3

Navigate to **Edit** option.

You can manage the distribution of work within your organization by creating work distribution rules that allow the system to evaluate work items and to determine the org unit responsible for these work items. Depending on the work category, the system directs the work items to the determined org unit, or provides the org unit as a proposal in the relevant business document. For each work category listed below, you can create one or more rules. If you do not create any rules for a given work category, all corresponding work items are subject to the global work assignment. You can find additional details about each work category in the related document in the Help Center.

Group By	Business Are	Action Buttons	Work Category	Work Distribution Status																
		<b>Edit</b> (highlighted)	<b>Business Area: Sales and Marketing (2)</b>																	
			Sales Unit for Sales	Global Work Assignment																
			Marketing Unit for Leads	Global Work Assignment																
			<b>Business Area: Service and Support (1)</b>																	
			Service and Support Team for Service Requests - Social Media	Defined Work Assignment																
<b>Details: Service and Support Team for Service Requests - Social Media</b>																				
<b>Work Distribution Rules</b>																				
The table shows the work distribution for the selected work category. The work is assigned to each org unit based on a prioritized list of rules. The priority allows the system to evaluate the rules from 1 to N to determine a first match whenever a work item needs to be assigned to an org unit. This first match is only returned. The system does not evaluate beyond the first match.																				
<table border="1"> <thead> <tr> <th>Priority / Rules</th> <th>Parameter</th> <th>Details</th> <th>Org Unit Responsible</th> <th>Valid From</th> <th>Valid To</th> <th>Last Changed By</th> </tr> </thead> <tbody> <tr> <td>1 RDA   Level 1 Support</td> <td>Customer Category</td> <td>All</td> <td>S1110 - Level 1 Support Queue</td> <td>11/22/2012</td> <td>08/25/2013</td> <td>Prinie Smits</td> </tr> </tbody> </table>							Priority / Rules	Parameter	Details	Org Unit Responsible	Valid From	Valid To	Last Changed By	1 RDA   Level 1 Support	Customer Category	All	S1110 - Level 1 Support Queue	11/22/2012	08/25/2013	Prinie Smits
Priority / Rules	Parameter	Details	Org Unit Responsible	Valid From	Valid To	Last Changed By														
1 RDA   Level 1 Support	Customer Category	All	S1110 - Level 1 Support Queue	11/22/2012	08/25/2013	Prinie Smits														

### Step 4

You can edit the rules associated with the selected work category. Each rule displays its name and the organizational unit that is responsible for the work contained in the work category. You can display all changes made to the rules in the Changes view.

If you change a rule that begins before the effective date, this rule will be delimited from the day before the effective date. A new rule will be created by the system with the same values and changes already entered by you. This new rule is then applicable from the effective date.

**EDIT ORGANIZATIONAL WORK DISTRIBUTION RULES**

Work Category: Service and Support Team for Service Requests - Social Media Org Function: Customer Service

Save and Close | Save | Close | Check

You can edit the rules associated with the selected work category. Each rule displays its name and the organizational unit that is responsible for the work contained in the work category. You can display all changes made to the rules in the Changes view.

**Work Distribution Rules**

If you change a rule that begins before the effective date, this rule will be delimited from the day before the effective date. A new rule will be created by the system with the same values and changes already entered by you. This new rule is then applicable from the effective date.

Effective Date: 03/22/2016 Show Future Work Distribution: Yes Go

Pri...	Name	* Org Unit Responsible	Rule Valid From	Rule Valid To
1	Service_Request	S3120 - Bikaner Division	02/29/2016	Unlimited
2	New_Test	BKNR_RD1 - Revenue Department	02/09/2016	Unlimited
3	B2B_Sustainable Product	SP2100 - Social Queue- Sustainable Products	10/27/2015	Unlimited
4	B2B_Sustainable_Products	S3114 - Product Queue- Green Tech	10/27/2015	Unlimited
5	B2B_Mobile	S3111 - Product Queue- Mobile	10/27/2015	Unlimited

**RULE DETAILS: SERVICE\_REQUEST**

Created By: Pragati Verma Last Changed By: Pragati Verma  
Created On: 02/29/2016 3:06 AM PST Last Changed On: 02/29/2016 3:06 AM PST

## Step 5

You can create a new rule here. Click **Add Rule**.

You have options-

- Add Rule:** To create new rule,
- Insert Rule:** To insert the existing rule.
- Delete Rule:** To delete the existing rule.
- Copy Rule:** To copy an existing rule.

**EDIT ORGANIZATIONAL WORK DISTRIBUTION RULES**

Work Category: Service and Support Team for Service Requests - Social Media Org Function: Customer Service

Save and Close | Save | Close | Check

You can edit the rules associated with the selected work category. Each rule displays its name and the organizational unit that is responsible for the work contained in the work category. You can display all changes made to the rules in the Changes view.

**Work Distribution Rules**

If you change a rule that begins before the effective date, this rule will be delimited from the day before the effective date. A new rule will be created by the system with the same values and changes already entered by you. This new rule is then applicable from the effective date.

Effective Date: 03/22/2016 Show Future Work Distribution: Yes Go

Pri...	Name	* Org Unit Responsible	Rule Valid From	Rule Valid To
1	Service_Request	S3120 - Bikaner Division	02/29/2016	Unlimited
2	New_Test	BKNR_RD1 - Revenue Department	02/09/2016	Unlimited
3	B2B_Sustainable Product	SP2100 - Social Queue- Sustainable Products	10/27/2015	Unlimited
4	B2B_Sustainable_Products	S3114 - Product Queue- Green Tech	10/27/2015	Unlimited
5	B2B_Mobile	S3111 - Product Queue- Mobile	10/27/2015	Unlimited

**RULE DETAILS: SERVICE\_REQUEST**

Created By: Pragati Verma Last Changed By: Pragati Verma  
Created On: 02/29/2016 3:06 AM PST Last Changed On: 02/29/2016 3:06 AM PST

## Step 6

Enter the name of the Rule. Example- **Test-Now**.

**EDIT ORGANIZATIONAL WORK DISTRIBUTION RULES**

Work Category: Service and Support Team for Service Requests - Social Media | Org Function: Customer Service

Pri...	Name	* Org Unit Responsible	Rule Valid From	Rule Valid To
10	Email channel	S3110 - Level 1 Support Queue	12/08/2015	Unlimited
11	Channel is 12345, Channel Type is Social Media	EN2100 - Social Queue- Entertainment	02/09/2016	Unlimited
12	Escalation Status is Escalated	S3110 - Level 1 Support Queue	02/29/2016	Unlimited
13	Test-Now		03/22/2016	Unlimited

**RULE DETAILS: ALL**

Created By: Rakesh Kumar | Last Changed By: Rakesh Kumar  
Created On: 03/22/2016 3:26 AM PST | Last Changed On: 03/22/2016 3:26 AM PST

Customer Category | Country | Product Category | Service Category | Account | Service Priority Code | Escalation Status | Channel Type | Channel

You can specify a particular item by moving it from the Available Items column to the Selected Items column.

Available Items	Selected Items
A-Account	All
B-Account	

## Step 7

Select the desired Organization unit.

**SELECT: Org Unit Responsible**

Find: Go Advanced

ID	Name
RE2100	Social Queue- Retail
S3115	(Virtual) Email Queue
S3116	(Virtual) VIP Queue
A01	Partner - Avnet - PCM
S3130	Field Squad - Boston
BKNR_AD1	Agriculture Department
BKNR_CMO1	Chief Minister Office
BKNR_RD1	Revenue Department
BKNR_PD1	Police Department
NCV	North Commercial Vehical Service Unit
NPV	North Passenger Vehical Sales Unit
A01WIPRO	wipro ltd
SALES	SALES dept.

**EDIT ORGANIZATIONAL WORK DISTRIBUTION RULES**

Work Category: Service and Support Team for Service Requests - Social Media | Org Function: Customer Service

* Org Unit Responsible	Rule Valid From	Rule Valid To
S3110 - Level 1 Support Queue	12/08/2015	Unlimited
EN2100 - Social Queue- Entertainment	02/09/2016	Unlimited
S3110 - Level 1 Support Queue	02/29/2016	Unlimited
	03/22/2016	Unlimited

Last Changed By: Rakesh Kumar | Last Changed On: 03/22/2016 3:28 AM PST

Service Priority Code | Escalation Status | Channel Type | Channel

Description: All

## Step 8

The next step is to enter the condition. You can have multiple options for entering the conditions to make a **Rule**. Like customer category, Country, Product category, service category, account, service priority code, escalation status, Channel type, Channel.

You can select channel type and select Social media channel. That means all the tickets from Social media will directly go to the Sales Department organization unit.

**EDIT ORGANIZATIONAL WORK DISTRIBUTION RULES**

Work Category: Service and Support Team for Service Requests - Social Media | Org Function: Customer Service

**Save and Close** | **Save** | **Close** | **Check**

10	Email channel	S3110 - Level 1 Support Queue	12/08/2015	Unlimited	
11	Channel is 12345; Channel Type is Social Media	EN2100 - Social Queue- Entertainment	02/09/2016	Unlimited	
12	Escalation Status is Escalated	S3110 - Level 1 Support Queue	02/29/2016	Unlimited	
13	Test-Now	SALES - SALES dept.	03/22/2016	Unlimited	

**RULE DETAILS: TEST-NOW**

Created By: Rakesh Kumar | Last Changed By: Rakesh Kumar  
Created On: 03/22/2016 3:26 AM PST | Last Changed On: 03/22/2016 3:33 AM PST

**Customer Category** | **Country** | **Product Category** | **Service Category** | **Account** | **Service Priority Code** | **Escalation Status** | **Channel Type** | **Channel**

You can specify a particular item by moving it from the Available Items column to the Selected Items column.

**Available Items**

- 1 Manual data entry
- 2 Messaging
- 3 Social Media
- 4 Telephony
- 5 Not Specified

**Selected Items**

- 1
- 2 All

1. Channel Type button highlighted with a red box.  
2. Social Media item highlighted with a red box.  
3. Move button between Available and Selected items.

## **Step 9**

Click the **Check** button. It will check for any inconsistency. Click **Save**.

**EDIT ORGANIZATIONAL WORK DISTRIBUTION RULES**

Work Category: Service and Support Team for Service Requests - Social Media    Org Function: Customer Service

**Buttons:** Save and Close | Save | Close | Check (highlighted with a red arrow)

11	Channel is 12345; Channel Type is Social Media	EN2100 - Social Queue- Entertainment	02/09/2016	Unlimited	
12	Escalation Status is Escalated	S3110 - Level 1 Support Queue	02/28/2016	Unlimited	
13	Test-Now	SALES - SALES dept.	03/22/2016	Unlimited	
14	All		03/22/2016	Unlimited	

**RULE DETAILS: ALL**

Created By: Rakesh Kumar    Last Changed By: Rakesh Kumar  
 Created On: 03/22/2016 3:48 AM PST    Last Changed On: 03/22/2016 3:48 AM PST

**Filter Buttons:** Customer Category, Country, Product Category, Service Category, Account, Service Priority Code, Escalation Status, Channel Type, Channel

You can specify a particular item by moving it from the Available Items column to the Selected Items column.

Available Items	Selected Items
Internet	All
Manual data entry	
Messaging	
Social Media	

# 19. SAP C4C – Social

You can use SAP C4C for Social Engagement to deliver a great customer experience by listening to and engaging with your customer using social media.

You can also coordinate within your team and across the organization to resolve issues that are opened by customer efficiently and effectively.

You can perform the following configuration activities related to SAP C4C for Social Engagement-

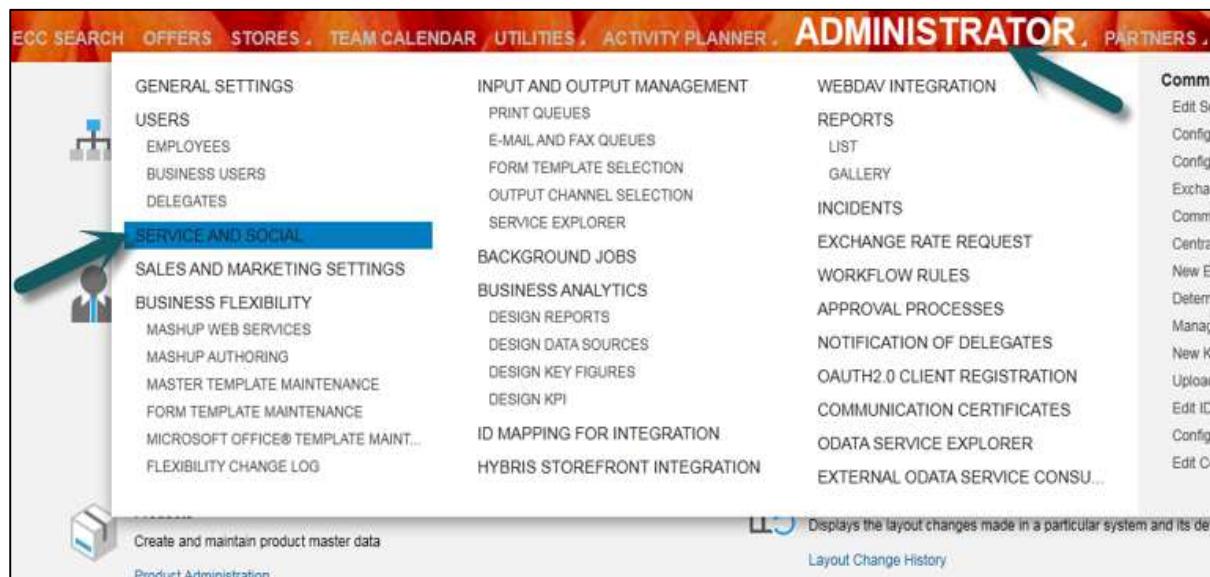
- Setting up channels.
- Setting up import runs.

## Setting up Channels

Following are the steps to set up a channel-

### Step 1

Go to **Administration -> Service and Social.**



## Step 2

Navigate to **Social Media -> Social Media Channels.**



## Step 3

To create a new social media channel, click **New**.

This screenshot shows a list of existing social media channels. The table has columns for 'Channel ID', 'Channel', 'Channel Type', 'Language', 'Created On', and 'Changed On'. There are four rows listed, each with a checkmark in the first column. A large teal arrow points to the 'New' button in the top right corner of the list view.

SERVICE AND SOCIAL: All Social Media Channels (72)						
Ar...	Bl...	Channel ID	Channel	Channel Type	Language	Created On
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	SI_123456	Spice India	SAP Social Media An...		01/28/2015 11:13 PM
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	SI_1234567	Spice India	SAP Social Media An...		01/29/2015 12:36 AM
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	AKS_123	Lava Streams	SAP Social Media An...		04/17/2015 3:33 AM
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ticket-123	Ticket Mashup	901		04/23/2015 12:14 AM

You have multiple options to integrate the channel with Facebook, Instagram, Twitter, You Tube and SAP social media analytics.

This screenshot shows the 'SOCIAL MEDIA CHANNEL SETUP' configuration screen. It includes sections for '1. SELECT CHANNEL TYPE', '2. ADVANCED SETTINGS', '3. CONNECT WITH CHANNEL', and '4. SET UP CHANNELS'. A red box highlights a dropdown menu under '2. ADVANCED SETTINGS' containing options: Facebook, Instagram, SAP Social Media Analytics, Twitter, and YouTube. A teal arrow points to this dropdown menu.

## Step 4

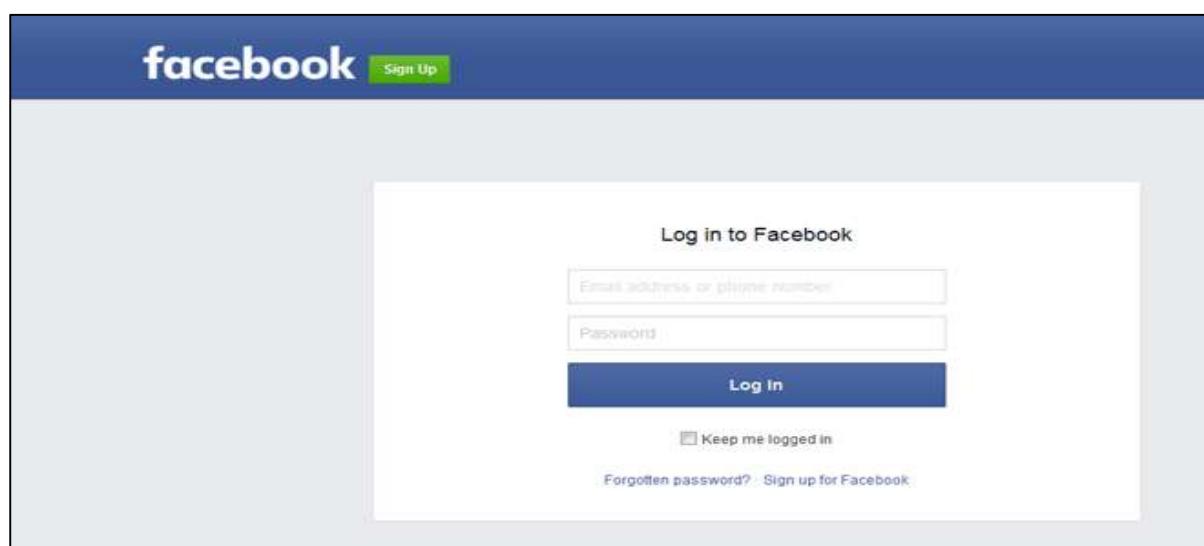
You have two options to connect with Facebook-

- **Option 1:** If you know the App ID and APP Secret of Facebook page, you can maintain it manually.
- **Option 2:** Click **Connect with Channel**. It will directly redirect you to the Facebook page; you need to enter your face book login credentials.

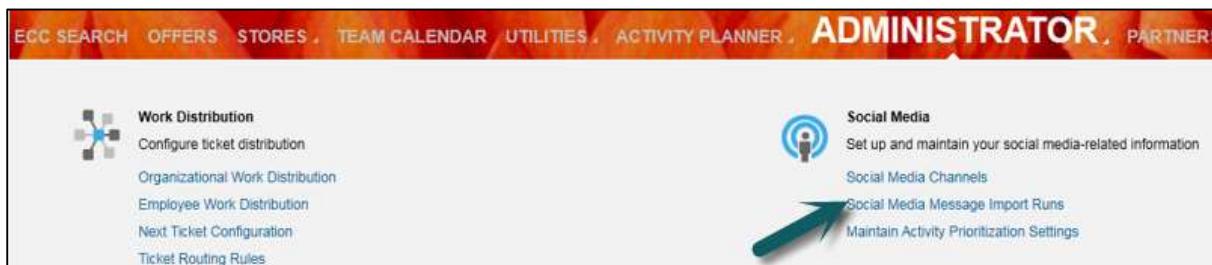
The screenshot shows the SAP C4C configuration interface. At the top, there's a section titled "2. ADVANCED SETTINGS" which contains fields for "App ID", "App Secret", "Run Initial Import From" (with a date picker), "Log Level", and "Direct Messages". Below this is another section titled "3. CONNECT WITH CHANNEL" containing a button labeled "Connect with Channel". A red box highlights the "Connect with Channel" button, and a red arrow points upwards from it towards the "Advanced Settings" section. To the right of the "Connect with Channel" button, the word "OR" is written, indicating an alternative to the manual input method above.

## Step 5

Enter your Facebook credentials.



In a similar way, you can create import runs under **Social Media -> Social Media Message Import runs.**



# 20. SAP C4C – Data Migration and Workflow

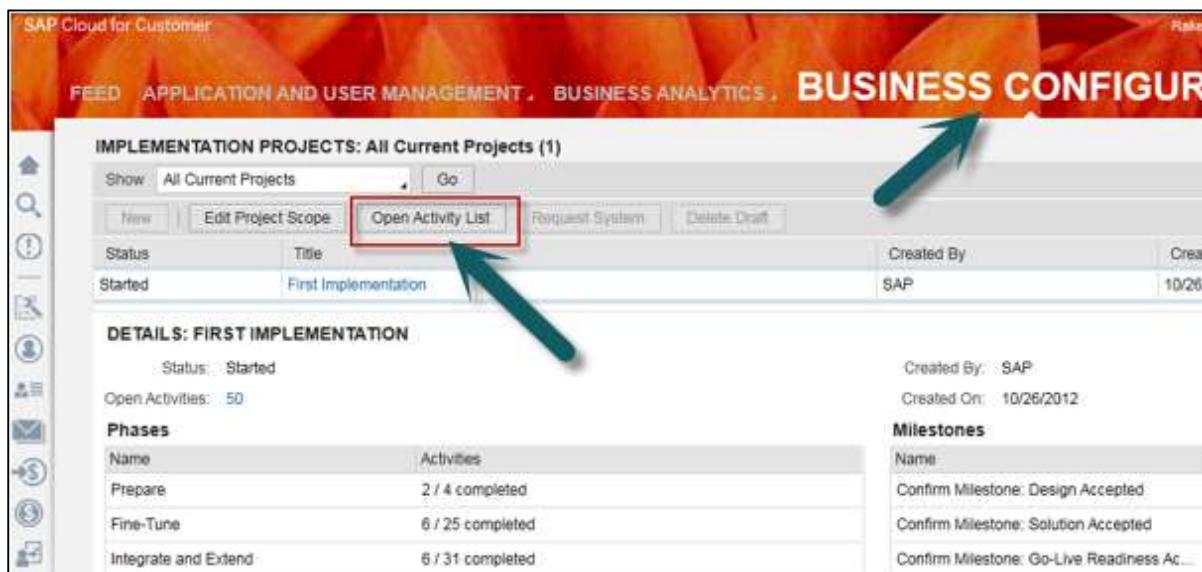
In SAP Cloud for Customer C4C, data migration feature enable you to transfer your legacy data using predefined templates. You can transfer your important data from one system to other.

## Data Migration

Follow the steps given below-

### Step 1

Navigate to **Business Configuration -> Open Activity List.**



## Step 2

Under the Fine tune tab, enter \*data\* in the find field. Click **Go**.

**ACTIVITY LIST: FIRST IMPLEMENTATION**

Total Activities in Project: 25      Open Activities: 19      In Progress Activities: 0

Show Modified View - Activities in Proj... and Find **\*data\*** Go

Group By None Open Change Status Add to Project Remove from Project Actions

St...	Name	Activity T...	In Project	Owner	Proj...	Pre...	Rep...	Acti...
(1)	Perform Data Extraction	Project Act...	Yes		No	No	Perfor...	
(2)	Perform Organizational Structure Setup	Data Migr...	Yes		No	Yes	Perfor...	

**DETAILS: PERFORM DATA EXTRACTION**

You must complete your data cleansing activities, perform data extraction, and fill the migration templates. You can collaborate with your service adviser on all tasks.

You have the following two options under Fine Tune-

- Perform data extraction.
- Download Migration template.

You can select download migration template. Migration templates are used to collect and prepare your legacy data for migration to your SAP cloud solution. There is a unique migration template for each migration activity.

To download single template, click "Download". To download several templates, select the templates and click "Download to ZIP File". Afterwards, carefully read the filling instructions in the migration template.

**ACTIVITY LIST: FIRST IMPLEMENTATION**

**Close**

All Prepare (2/4 Completed) **Fine-Tune (6/25 Completed)** Integrate and Extend (6/31 Completed) Test (0/1 Completed) Go Live (0/3 Completed)

The Fine-Tune phase organizes all mandatory configuration activities that you need to complete in a logical sequence. It allows you to tailor the solution to your specific needs before going live by checking predefined settings and entering additional settings for your selected scope. You can also add optional configuration activities to the activity list.

Total Activities in Project: 25 Open Activities: 19 In Progress Activities: 0 Closed Activities: 6

Show Modified View - Activities in Proj... and Find "data" Go

Group By None Open Change Status Add to Project Remove from Project Actions

St.	Name	Activity T...	In Project	Owner	Pre...	Rep...	Act...	Ch...	Change On
⊕	Perform Data Extraction	Project Act...	Yes		No	No	Perfor...	Oliver...	10/29/2012 3:42 AM PST
✓	Perform Organizational Structure Setup	Data Migr...	Yes		No	Yes	Perfor...	Oliver...	10/29/2012 6:14 AM PST

## Work Flow

In SAP C4C, you can define and activate rules for updating the fields and set up notification automatically. When a condition is met, the field update automatically change the value of fields.

You can set the notifications to the users to inform that an item has been changed and a task has been completed successfully. If you set up email notifications, they can also be sent to customers.

**Example:** When a ticket status has been changed, you can configure a notification to user.

When you define workflow rules, you specify basic data for each rule, the conditions under which the rule is invoked, and a field is updated, or a notification is sent, and in the case of a notification, the list of recipients.

You can define workflow rules for automatic field updates for the following items-

- Accounts
- Contacts
- Opportunities
- Tickets

**Example:** Creating a rule for sending the notification to the agent responsible. The ticket is created with priority **urgent** in the system.

## Creating Workflow Rules

Let us see how to create a rule for sending the notification to the agent responsible when a ticket is created with urgent priority in the system-

### Step 1

Navigate to **Administration -> Workflow Rules.**



### Step 2

To create a new rule, Click **New**.

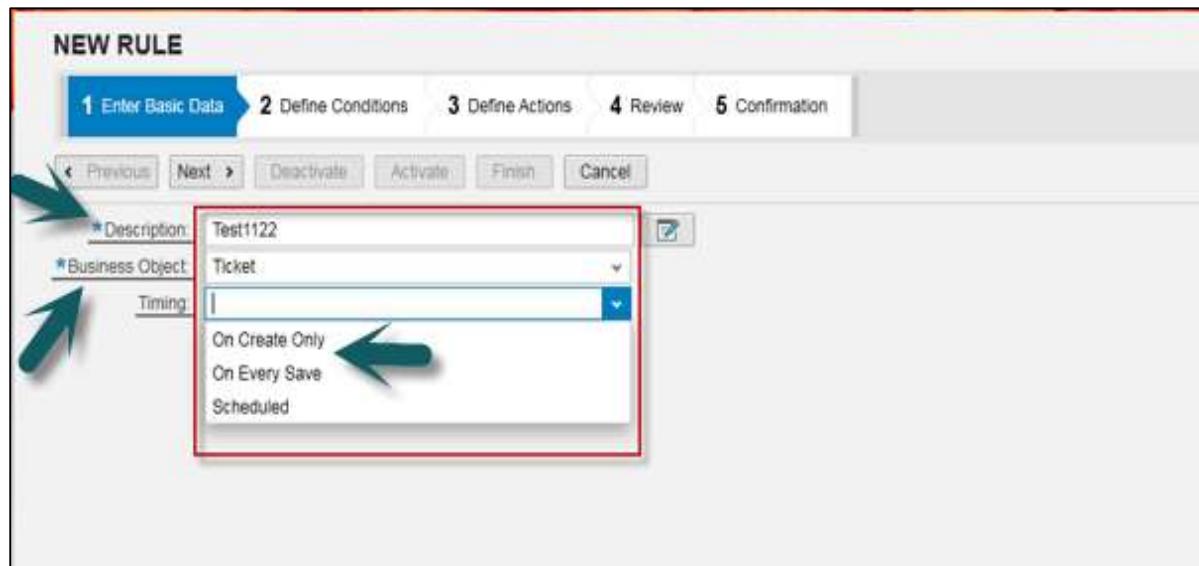
WORKFLOW RULES: Active (19)					
<a href="#">Edit</a> <a href="#" style="background-color: #0070C0; color: white; border: 1px solid #0070C0;">New</a> <a href="#">Copy</a> <a href="#">Delete</a>					
<input type="checkbox"/> <a href="#">Active</a>		<input type="checkbox"/> <a href="#">Find</a>		<input type="checkbox"/> <a href="#">Copy</a>	
Description	Business Object	Type	Status	Created By	Created On
Test for Blank	Opportunity	E-Mail	Active	ADMINISTRATION01	03/01/2016
alert on initial review due	Ticket	E-Mail	Active	ASHISH	07/19/2015
External - Ticket Completed	Ticket	E-Mail	Active	ADMINISTRATION01	06/22/2013

### Step 3

In the new window, enter the following details-

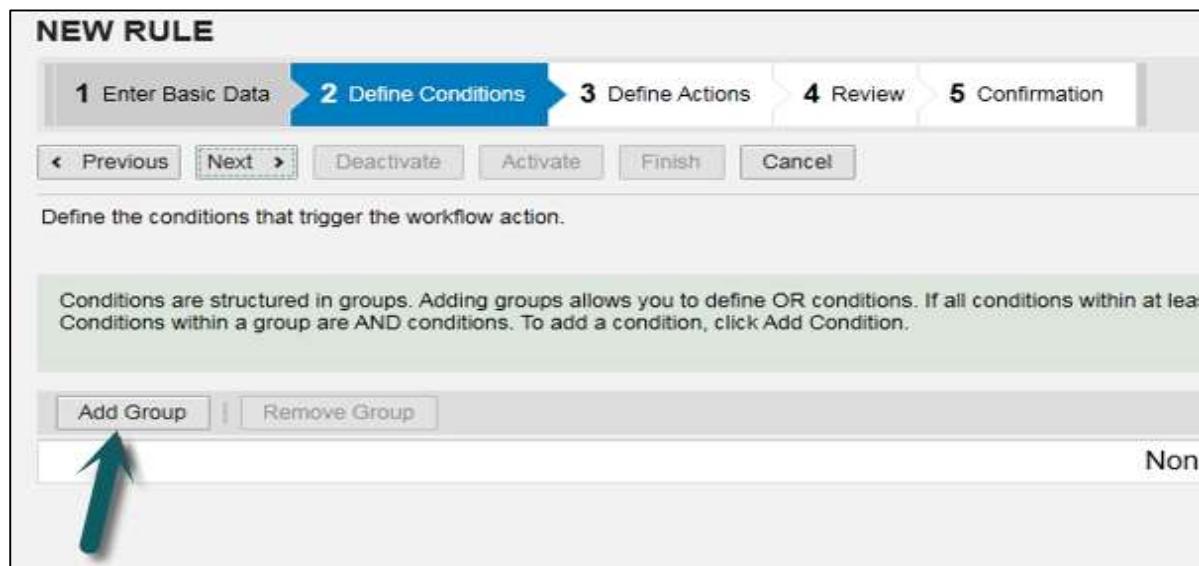
- Enter Basis data:** In this field, you maintain the basic data, maintain description, business object and timing.
- Business Object:** Select the business object, which is required for your objective. You can select Business object is Ticket, because you are creating a workflow rule for ticket.

- **Timing:** Timing means when the workflow rule should execute. You can select from the following three options-
  - **On Create only:** If you select this option, at the time of ticket creation, workflow will work.
  - **On Every Save:** This means when you save the ticket, workflow will work.
  - **Scheduled:** This option allows you to schedule the time and at the scheduled time, workflow will work. Click **Next**.



## Step 4

Click **Add Group**.

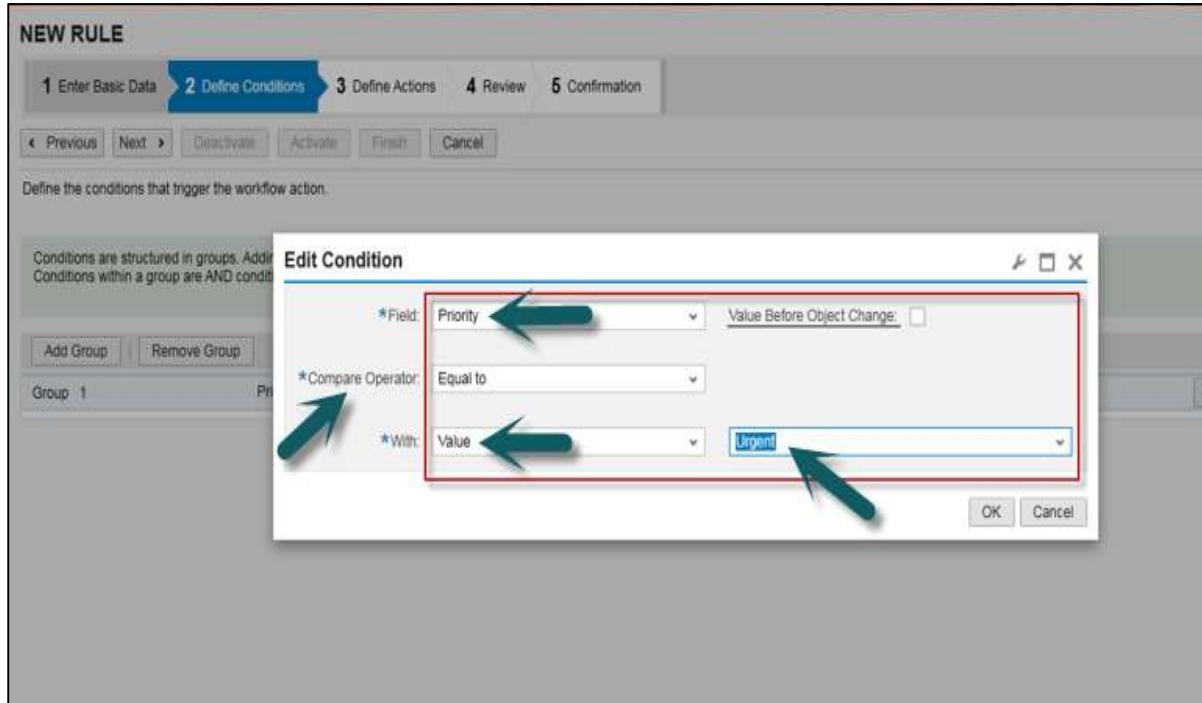


## Step 5

Conditions are structured in groups. Adding groups allows you to define OR conditions. This means when all the conditions within at least one group are met, the overall condition is fulfilled.

Conditions within a group are AND conditions. To add a condition, click **Add Condition**. Maintain all field as per your need. You will set the condition on priority as urgent.

Once you define the condition, click **Next**.



## Step 6

In the next window, enter the action. You have multiple option of actions. You can select from the following actions-

- E-Mail
- Field Update
- Messaging
- Notification



## Step 7

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

Click **Add Determination** and Select **Agent Responsible for ticket** from the drop down list.

**NEW RULE**

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

< Previous    Next >    Deactivate    Activate    Finish    Cancel

\*Rule Type: Notification

Send Notification: 0 Day(s) On Business Obj

Expires After: 30 Day(s)

Cancellation of Task: Conditions Not Met

\*Subject: Urgent Ticket Created

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

Plac... Field

< Previous    Next >    Deactivate    Activate    Finish    Cancel

Plac...	Field
&1	
&2	
&3	
&4	

**Recipient Determination**

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

Add Determination    Remove Determination

Agent Responsible for Ticket

## Step 8

Review the rule and click the **Activate** button as shown below-

**NEW RULE**

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

< Previous   Next >   Deactivate   **Activate**   Finish   Cancel

**BASIC DATA**

Description: test1122	Conditions are structured in groups. Adding groups allows you to define OR conditions. If all conditions within at least one group are met, the overall condition is fulfilled.		
Business Object: Ticket	Conditions within a group are AND conditions. To add a condition, click Add Condition.		
Rule Type: Notification			
Notification Subject: Urgent Ticket Created			
Status: Inactive	Group: 1	Priority	Equal to
	Send Notification: 0 Day(s) On Business Object Change	Urgent	
	Expires After: 30 Day(s)		
	Cancellation of Task: Conditions Not Met		
<b>Employee</b>	<b>Recipient Determination</b>		
None	Agent Responsible for Ticket		

## 21. SAP C4C – Pricing

Pricing in C4C depends on price master data, which is derived from Price master list. Price master data is maintained in Products work center.

SAP C4C for sales contains a list of predefined list of elements and you can activate them under the scoping phase of project implementation.

To view Price List, go to **Product work center -> Price List**.

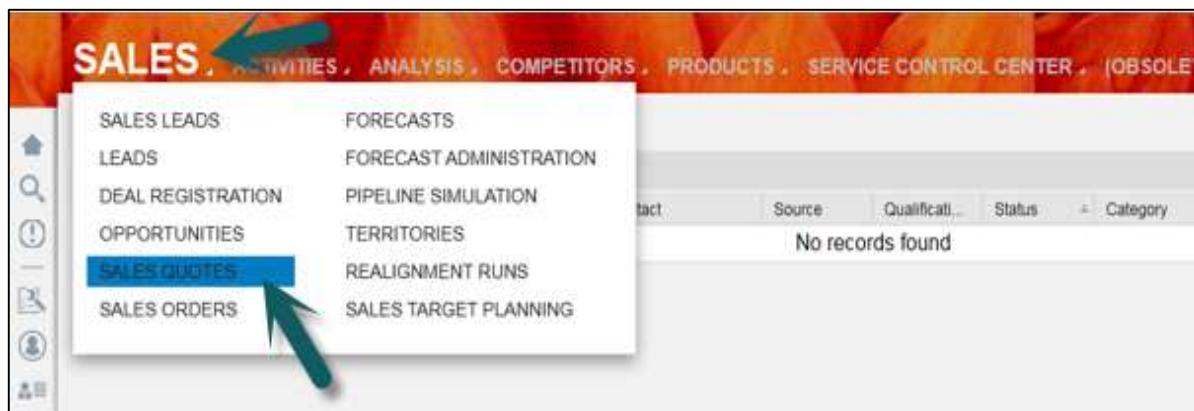


You can create, maintain and mass update price master data such as price lists and discount lists.

## 22. SAP C4C – Sales Cycle

In SAP C4C, a sales cycle consists of all key activities under the Sales process such as-

- Sales Order
- Sales Quotes
- Sales Lead

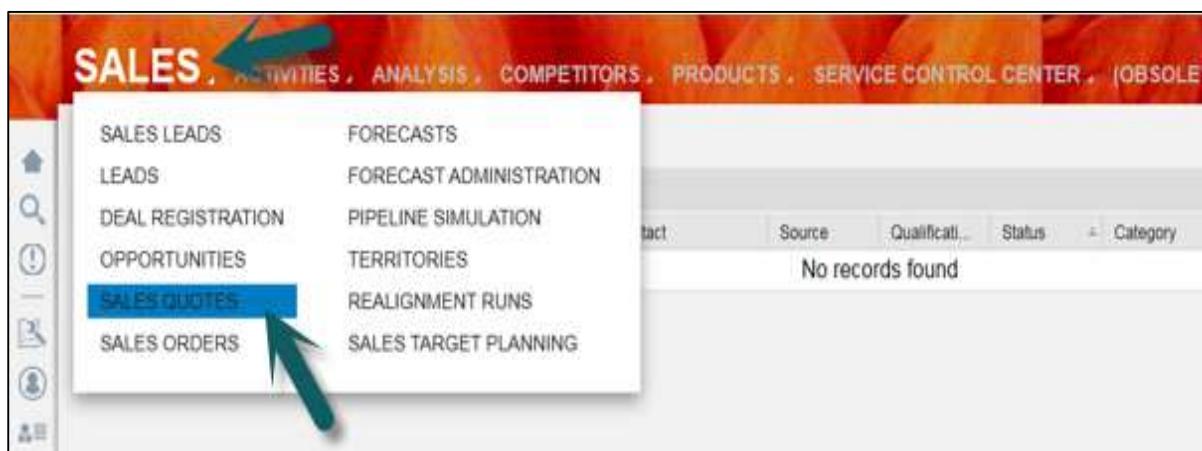


### Sales Quotes

Sales quotes is used to offer products to the customers as per specific terms and fixed conditions. A sales quote binds the seller to sell products for a specific period of time and price. Sales agents are responsible for the creation of sales quote in a company.

#### Step 1

Navigate to **Sales work center -> Sales Quotes**.



## Step 2

Click **New** to enter account/customer data for creating sales quotes. Once you enter all the details, click **Save**.

The screenshot shows the SAP C4C Sales Quotes interface. On the left, there is a list titled "SALES QUOTES: My Open Quotes (0)" with columns for ID, Progress, Status, External Reference, Account, and Date. A message "No records found" is displayed. On the right, a modal window titled "NEW QUOTE" is open. It contains fields for Account (Roodoo), Primary Contact (Anushka Verma), External Reference, Description, Date (05/05/2016), Payment Terms, Delivery Priority (Normal), Valid To (05/08/2016), Owner (Rakesh Kumar), Sales Unit, Territory (Delhi), and External Note. Two validation errors are shown at the bottom: "Please enter a party with role Seller" and "Please enter a party with role Sales Unit". At the bottom right of the modal are "Save" and "Cancel" buttons.

## Step 3

In the next window, under the **Products** tab, click **Add**. You can add the product that you are selling to the customer in this tab.

The screenshot shows the SAP C4C Sales Quote interface. On the left, there is a sidebar with "SALES QUOTE" and a dollar sign icon. In the center, there are tabs: OVERVIEW, PRODUCTS (which is highlighted with a blue arrow), INVOLVED PARTIES, SALES DOCUMENTS, ATTACHMENTS, APPROVAL, ACTIVITIES, OUTPUT, and FEED. The PRODUCTS tab is active, showing a table with columns: Line, Product, Descri..., Price, Price Unit, Quantity, Discou..., Item Value, Action, and Color. A message "No records found" is displayed. At the top right of the products table, there is an "Add" button with a gear icon, which has a green arrow pointing to it.

## Step 4

Go to **Involved Parties** tab, you can add all the parties involved to execute the transactions such as- bill to party, ship to party, sold to party etc.

The screenshot shows the SAP C4C Sales Quote interface. On the left, there's a sidebar with various status indicators and links. The main area has tabs: OVERVIEW, PRODUCTS, INVOLVED PARTIES (which is selected and highlighted in blue), SALES DOCUMENTS, ATTACHMENTS, APPROVAL, ACTIVITIES, and OUTPUT. Below the tabs is a table titled 'INVOLVED PARTIES' with columns for Role, Name, Address, E-Mail, Phone, and Action. An 'Add' button with a gear icon is located in the top right corner of this table. The table contains five rows of data, each representing a different party type (Account, Owner, Bill-To, Ship-To, Payer) with the same details: Roodoo as the name, 500 Bangla Sa... as the address, salesinfo@Roodoo.c... as the e-mail, +91 2266556901 as the phone, and checkmarks in the action column.

## Step 5

Go to **Sales Document**. You can get the details of all the sales documents (sales quotes, sales order etc.) that are related to this sales quote. If your sales quote is created with reference to some other sales document, you can see the details in this tab.

This screenshot shows the SAP C4C Sales Quote interface again, but this time the 'SALES DOCUMENTS' tab is selected. The main area is divided into sections: 'SALES QUOTES', 'SALES ORDERS', and 'EXTERNAL FOLLOW-UP DOCUMENTS'. Each section has a table with columns like ID, External Reference, Date, and Owner. All three sections show a message: 'No records found'.

## Step 6

Go to the **Attachment** tab, you can attach any other external documents. Go to the **Approval** tab, you can see the approval process like approval required from senior to process this sales quote, etc.

You can also see the status here pending, approved, rejected etc.

**SALES QUOTE**

451

Delivery Priority: Normal  
Progress: Not Relevant  
Account: Roodoo  
External Reference:  
Ticket:  
Primary Contact: Anushka Ve...  
Status: Open  
Reason for Rejection:  
Approval Status: Not Started  
Valid To: 05/08/2016

OVERVIEW PRODUCTS INVOLVED PARTIES SALES DOCUMENTS ATTACHMENTS APPROVAL ACTIVITIES OUTPUT

**Approval Process**

Group By Step

St...	Status	Approver	Changed On	Phone
No records found				

**APPROVAL NOTE**

## Step 7

Navigate to the **Activities** tab. Create activities related to the sales representative like create an appointment through phone calls, e-mails etc.

**SALES QUOTE**

451

Delivery Priority: Normal  
Progress: Not Relevant  
Account: Roodoo  
External Reference:  
Ticket:  
Primary Contact: Anushka Ve...  
Status: Open  
Reason for Rejection:  
Approval Status: Not Started  
Valid To: 05/08/2016  
Description:

OVERVIEW PRODUCTS INVOLVED PARTIES SALES DOCUMENTS ATTACHMENTS APPROVAL ACTIVITIES OUTPUT FEED

**APPOINTMENTS**

Subject	Status	Start Date/Time	Owner	Primary Contact	Phone
No records found					

**TASKS**

Subject	Status	Start Date/Time	Owner	Primary Contact	Phone
No records found					

**PHONE CALLS**

Subject	Status	Start Date/Time	Owner	Primary Contact	Phone
No records found					

## Step 8

Under the **Changes** tab, click **Go**. You can see all the changes made in this sales quote by all the user on different times on this sales quotes. You can get to know what all changes that has made to this sales quote.

The screenshot shows the SAP C4C Sales Quote interface. At the top, there are tabs: PRODUCTS, INVOLVED PARTIES, SALES DOCUMENTS, ATTACHMENTS, APPROVAL, ACTIVITIES, OUTPUT, FEED, and CHANGES. The CHANGES tab is highlighted with a red box and a green arrow pointing to it. Below the tabs, there is a search bar with fields for 'Changes Made From' and 'Changes Made To', and a dropdown for 'Attribute'. Below the search bar are 'Go' and 'Reset' buttons, with a green arrow pointing to the 'Go' button. The main content area displays a table of change history entries. One entry is highlighted with a red box and a green arrow pointing to it. The table has columns for 'Change Date/Time', 'Changed By', and 'User ID'. The first row shows: Change Date/Time - 05/05/2016 7:19 PM, Changed By - Rakesh Kumar (KSSEBU6LUOW), User ID - A. Below this table, a section titled 'Details: 05/05/2016 7:19 PM' shows a grid of attribute changes. The grid has columns for 'Attribute', 'Value Changed From', 'Value Changed To', and 'Modification T...'. The data includes: Item 10 - Product Description (Jackets), Item 10 - Line (10), Item 10 - Item Type (AGN-Product - Quote Item), Item 10 - Product ID (APP-201), and Item 10 - UoM (EA-Each). A green arrow points to the 'Create' link under the 'Modification T...' column.

## Sales Order

Sales order is defined as a document that is sent to the customer for delivery of goods and services. Sales order is generated when a customer accepts a sales quote.

A sales order is an internal document of a company. To create Sales order follow the steps given below-

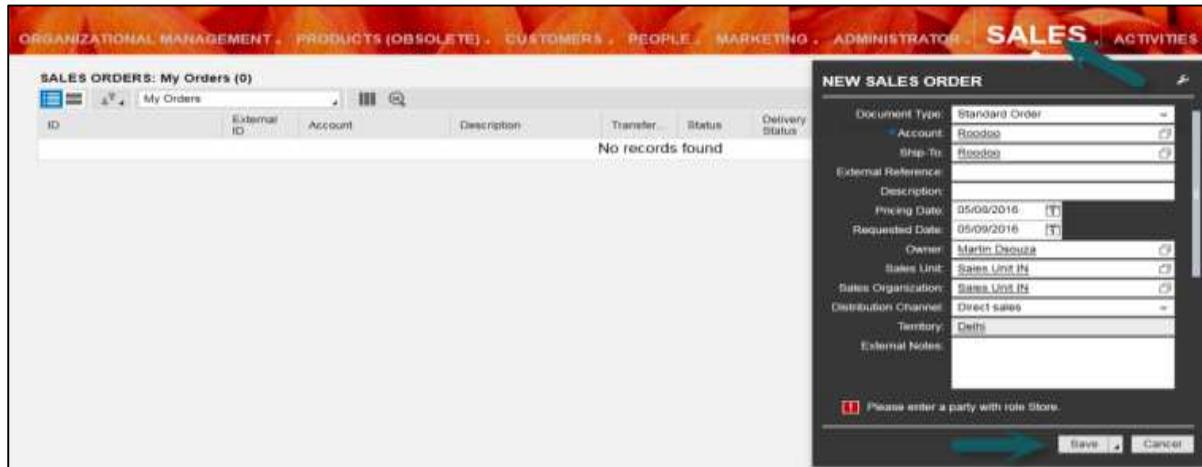
### Step 1

Go to **Sales Work Center -> Sales Order**.

The screenshot shows the SAP C4C Sales Work Center interface. At the top, there is a navigation bar with links: ORGANIZATIONAL MANAGEMENT, PRODUCTS (OBSOLETE), CUSTOMERS, PEOPLE, MARKETING, ADMINISTRATOR, and SALES. The SALES link is highlighted with a red box and a green arrow pointing to it. Below the navigation bar, there is a sidebar with various links: SALES LEADS, FORECASTS, LEADS, FORECAST ADMINISTRATION, DEAL REGISTRATION, PIPELINE SIMULATION, OPPORTUNITIES, TERRITORIES, SALES QUOTES, REALIGNMENT RUNS, SALES ORDERS, and SALES TARGET PLANNING. The SALES ORDERS link is highlighted with a red box and a green arrow pointing to it. The main content area shows a table titled 'SALES QUOTES: My Open Quotes (1)'. The table has columns: ID, Progress, Status, External Reference, Account, and Date. There is one row with ID 451, Progress Not Relevant, Status Open, Account Roodoo, and Date 05/05/2016.

## Step 2

To open a new sales order, go to **New**. In the new window, you need to enter all the details and click **Save**.



## Step 3

In the new window, enter the details such as- Products, Involved Parties, Approval Activities, Attachments and Changes.

## 23. SAP C4C – Retail

SAP C4C Retail allows retail stores to provide their customer with personalized shopping experience by suggesting recommended products and easy check out options. Using SAP C4C Retail, a retail store employee can import all user details, offers and in-store products from C4C system and use it to emphasize great store experience.

A SAP C4C Retail store agent can perform the following functions-

- **Customer View:** An agent can check and view the past order details of a customer and hence provide personalized service by recommending a few products.
- **Customer Check-In:** The customer checks in to the store for shopping.
- **Customer Look up:** Retail agent can look up for the details of any customer who walks in to the store, his loyalty status, contact details, etc.
- **Product Recommendation:** Sales agent can recommend products to the customer as per his or her wish list.
- **Product Look up:** Retail agent can look up the products for customers and provide details like prices, offers and location of products in store.
- **Availability Check:** C4C Retail agent can perform the availability check for specific products in their stores as well as other store locations.

SAP C4C Retail targets two business roles in managing customer relationship management-

- Store Associate
- Store Manager

You can look up the customer details to get a better understanding of customer preferences to serve them better.

### Step 1

Navigate to **Customers Work Center -> Individual Customers.**



## Step 2

You have an option of searching for the customer by name, loyalty ID, phone number, e-mail address, or postal address.

Name	Phone	Mobile Phone	E-Mail	Social Med...	Addi	Stz	Chi	Ext	I	Best Own	Email	Last Ac
John Smith			robert79duc...@google...									

## Step 3

Once you find the customer, click the name in the customer list.

If retail is scoped, you can view retail-specific work centers such as overview, preferences, shopping lists, shopping history, and offers.

ID	Description	Priority	Status	Source	Channel	Created On	Assigned To	Product ID
3486	Hi, no exchange	Low	Open	Social Media	Mona...	10/25/2013...		
3447	I'm having prob	Low	Open	Social Media	Mona...	10/25/2013...		
3208	I'm interested in	Low	Open	Social Media	Mona...	06/26/2013...		
3206	Hi, I'm intereste	Low	Open	Social Media	Mona...	06/26/2013...		
3203	I would truly enj	Low	Open	Social Media	Mona...	06/26/2013...		P900100
3111	Hi, can you pleas	Low	Open	Social Media	Mona...	06/26/2013...		

## Step 4

You can move on to the Preferences tab to display consumer maintained preferences. Based on the preferences, you can also suggest products guide them to where the products are located in the store.

## Shopping List

In SAP C4C Retail, a Shopping List tab shows all the shared shopping lists a customer has maintained in his account. You can define a shopping list as shared list or wish list that a consumer maintains and shares with other members of the household.

A customer can also invite other members of household to edit the shared list by giving access to shopping list. Every time a household member enters items into the shared list, after updating the list, the added items display in the list.

C4C Retail agent can access a customer's shopping list that allows agents to provide personalized and exceptional customer service.



The screenshot shows a user interface for SAP C4C Retail. On the left, there is a sidebar with a 'CUSTOMER' section containing a small profile picture of a person. To the right of the sidebar is a navigation bar with tabs: 'CAMPAIGNS', 'MARKETING INTERACTIONS', 'MARKETING PERMISSIONS', and 'SHOPPING LISTS'. The 'SHOPPING LISTS' tab is highlighted with a blue border. Below the navigation bar, there is a section titled 'WISH LISTS' with a sub-section 'SHARED WISH LISTS'. A green arrow points upwards from the text 'Every time a household member enters items into the shared list...' towards the 'SHOPPING LISTS' tab. At the bottom of the screen, there is a horizontal table header with columns: 'ID', 'Description', 'Status', 'Creation date', and 'Action'. There is also a 'Search' input field and a 'Actions' button.

ID	Description	Status	Creation date	Action
----	-------------	--------	---------------	--------

## 24. SAP C4C – Integration with CRM and ERP

Many companies have an on-premise solution that contains master data, customer and product information, and pricing data. Details from SAP ECC system is required when opportunities are won and sales order is generated.

Following are the key reasons why an integration is required with SAP ERP and CRM system-

- To provide an organization level solution for all sales, marketing and service activities including all subsidiaries, sales offices.
- Many companies prefer a SAP Cloud solution for customer user experience that helps sales representatives to provide outstanding customer experience and SAP CRM as back-end system to support key activities.
- An organization wants to extend existing CRM platform to new users.
- SAP CRM system is up and running smoothly but the company wants to switch over to cloud solution for managing new deployments and releases.
- To replace existing cloud SFA solution with SAP Cloud for Customer.

SAP provides standard integration scenarios for integration with SAP ERP and SAP CRM. Integration with ERP and CRM is very common.

### **Integration with ERP**

---

Two common integration scenarios that are prepackaged with cloud solution are-

- SAP NetWeaver Process Integrator.
- SAP HANA Cloud Integration HCI.

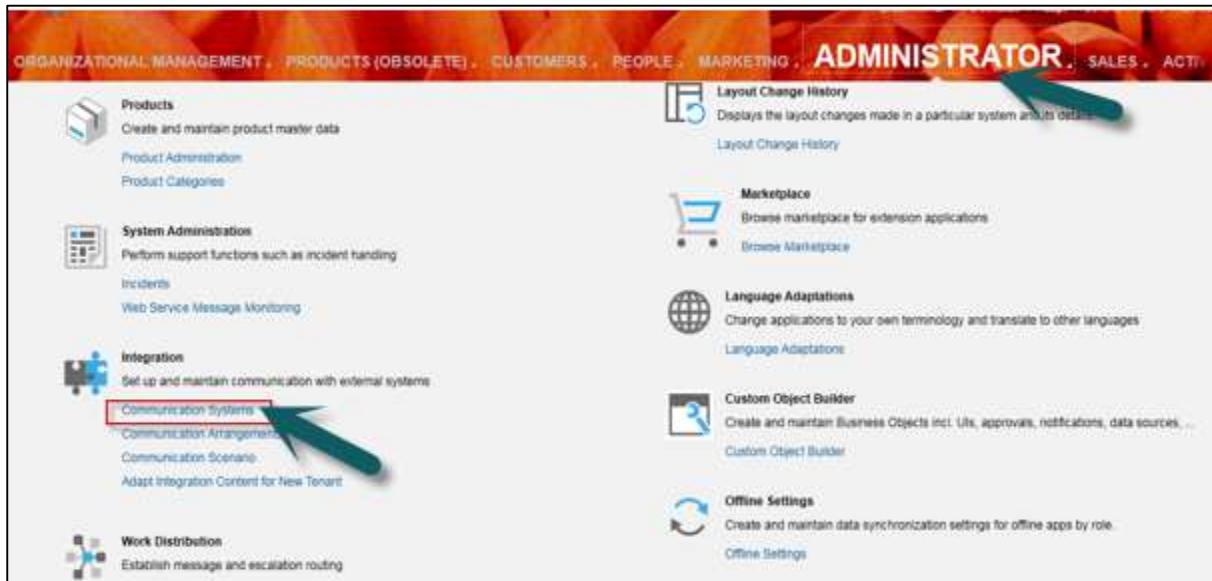
SAP HANA Cloud Integration is SAP's cloud middleware that can be used for integration. It is a cloud option for customers who do not currently have an integration middleware. The integration middleware enables the customization of the integration as well as design of new integration scenarios.

## Create Communication System in C4C

Following are the steps to create communication system in SAP C4C.

### Step 1

Navigate to **Administration work center -> Communication system -> New.**



A new window- **New Communication System** opens.

### Step 2

Enter ID, system access type and system Instance ID. Enter other fields as per the requirement.

Select SAP Business Suit if you are creating communication system for integrating SAP on premise system (SAP ECC or SAP CRM) with SAP C4C.

Enter Business System Id, IDOC logical Systems Id, SAP Client, Preferred application protocol. These are on premise data. Therefore, we need to get this information from on premise system to enter here.

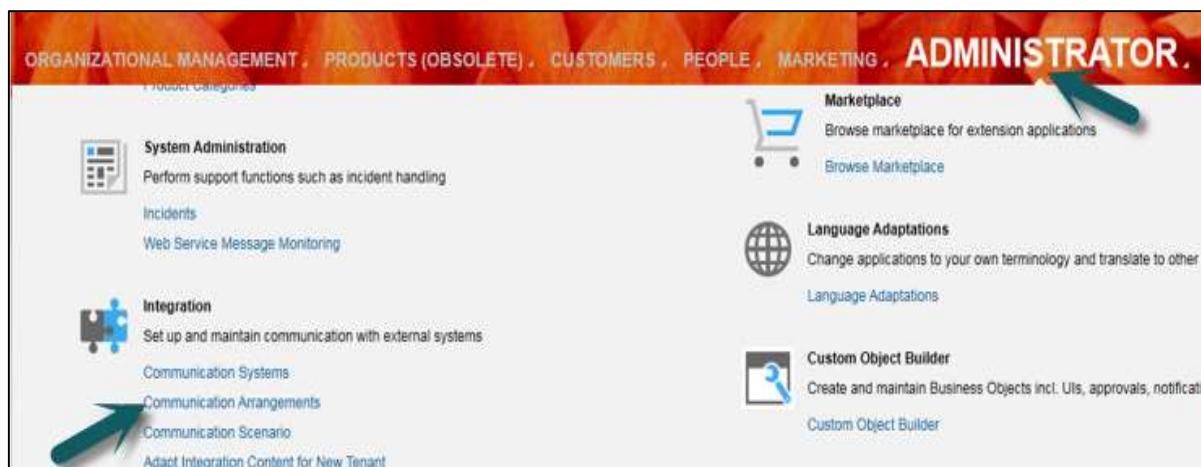
Click **Save**.

**NEW COMMUNICATION SYSTEM**

Save and Close	Save	Close	Actions										
<b>BASIC INFORMATION</b>													
<input type="text" value="Test1234"/> *ID: <input checked="" type="checkbox"/> SAP Business Suite: <input type="text" value="Host Name"/> <input type="text" value="System Access Type: Internet"/>													
<b>INTERNAL COMMENT</b>													
<b>TECHNICAL CONTACT</b> First Name: Last Name: Email: Phone: Fax:													
<b>System Instances</b> Add Row Remove <table border="1"> <thead> <tr> <th>System Instance ID</th> <th>Business System ID</th> <th>IDoc Logical System ID</th> <th>SAP Client</th> <th>Preferred Application Protocol</th> </tr> </thead> <tbody> <tr> <td>TEST1234</td> <td>0009</td> <td>00003</td> <td>301</td> <td>4 - IDOC</td> </tr> </tbody> </table>				System Instance ID	Business System ID	IDoc Logical System ID	SAP Client	Preferred Application Protocol	TEST1234	0009	00003	301	4 - IDOC
System Instance ID	Business System ID	IDoc Logical System ID	SAP Client	Preferred Application Protocol									
TEST1234	0009	00003	301	4 - IDOC									

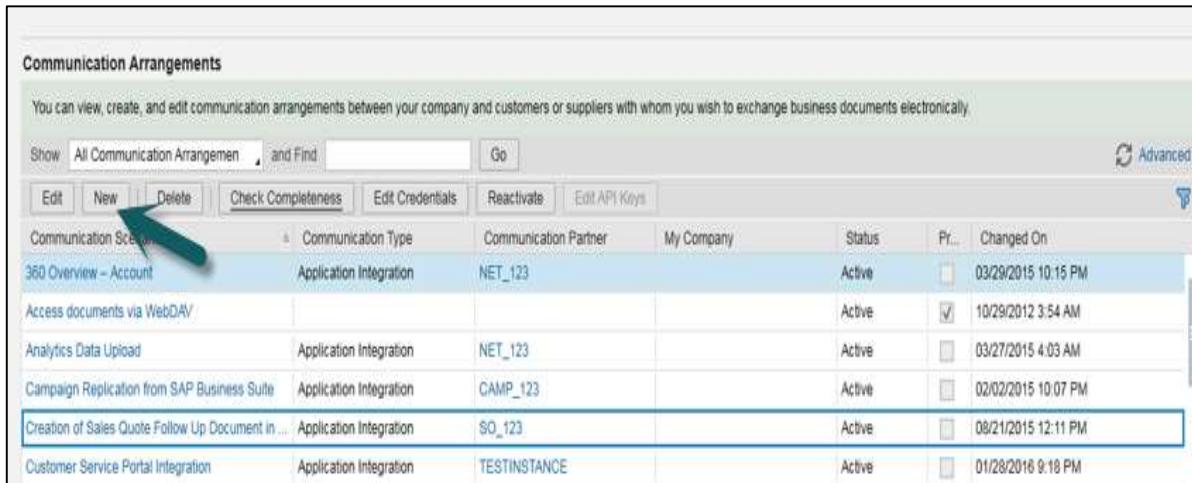
### Step 3

The next step is to enter the details in **Communication Arrangements**.



## Step 4

Click **New**.



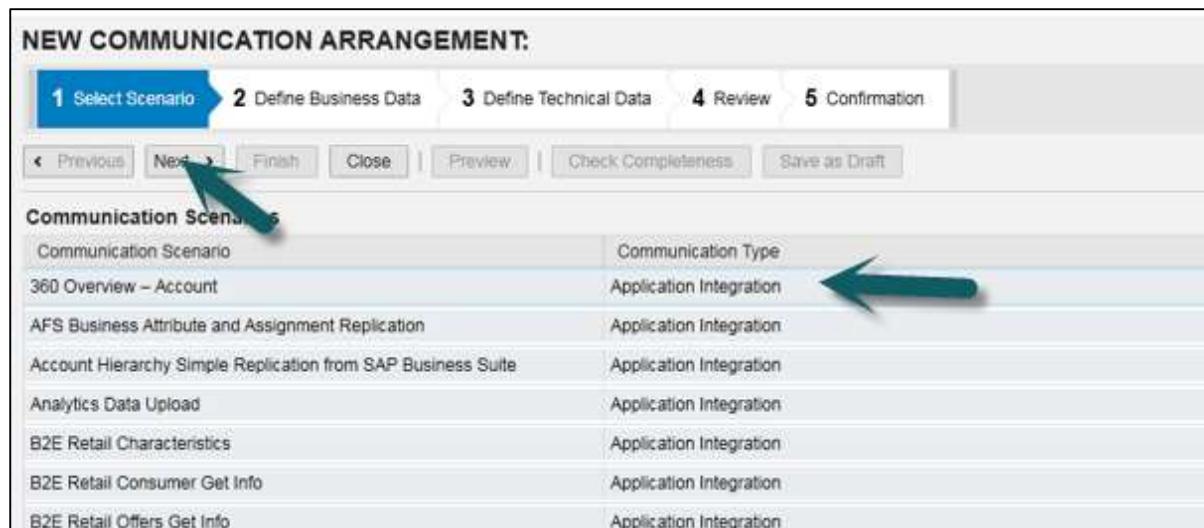
Communication Arrangements						
You can view, create, and edit communication arrangements between your company and customers or suppliers with whom you wish to exchange business documents electronically.						
Show		All Communication Arrangements	and Find	Go	Advanced	
Edit	New	Delete	Check Completeness	Edit Credentials	Reactivate	Edit API Keys
Communication Scenario	Communication Type	Communication Partner	My Company	Status	Pr...	Changed On
360 Overview – Account	Application Integration	NET_123		Active	<input type="checkbox"/>	03/29/2015 10:15 PM
Access documents via WebDAV				Active	<input checked="" type="checkbox"/>	10/29/2012 3:54 AM
Analytics Data Upload	Application Integration	NET_123		Active	<input type="checkbox"/>	03/27/2015 4:03 AM
Campaign Replication from SAP Business Suite	Application Integration	CAMP_123		Active	<input type="checkbox"/>	02/02/2015 10:07 PM
Creation of Sales Quote Follow Up Document in ...	Application Integration	SO_123		Active	<input type="checkbox"/>	08/21/2015 12:11 PM
Customer Service Portal Integration	Application Integration	TESTINSTANCE		Active	<input type="checkbox"/>	01/28/2016 9:18 PM

## Step 5

A new window “New Communication Arrangement” will open. You need to select the communication scenario from the list as per the requirement. You have to select an account, as you want to replicate accounts from on premise system to SAP C4C system.

Under the **Select Scenarios** tab, select the communications scenario for which you want to create a communication arrangement and click **Next**.

Based on the communication scenario you selected, the system presets the fields in the next steps with default values. You can change the values, if necessary.



NEW COMMUNICATION ARRANGEMENT:																	
1 Select Scenario	2 Define Business Data																
3 Define Technical Data	4 Review																
5 Confirmation																	
<input type="button" value="Previous"/> <input type="button" value="Next &gt;"/> <input type="button" value="Finish"/> <input type="button" value="Close"/> <input type="button" value="Preview"/> <input type="button" value="Check Completeness"/> <input type="button" value="Save as Draft"/>																	
<b>Communication Scenario</b> <table border="1"> <tr> <td>Communication Scenario</td> <td>Communication Type</td> </tr> <tr> <td>360 Overview – Account</td> <td>Application Integration</td> </tr> <tr> <td>AFS Business Attribute and Assignment Replication</td> <td>Application Integration</td> </tr> <tr> <td>Account Hierarchy Simple Replication from SAP Business Suite</td> <td>Application Integration</td> </tr> <tr> <td>Analytics Data Upload</td> <td>Application Integration</td> </tr> <tr> <td>B2E Retail Characteristics</td> <td>Application Integration</td> </tr> <tr> <td>B2E Retail Consumer Get Info</td> <td>Application Integration</td> </tr> <tr> <td>B2E Retail Offers Get Info</td> <td>Application Integration</td> </tr> </table>		Communication Scenario	Communication Type	360 Overview – Account	Application Integration	AFS Business Attribute and Assignment Replication	Application Integration	Account Hierarchy Simple Replication from SAP Business Suite	Application Integration	Analytics Data Upload	Application Integration	B2E Retail Characteristics	Application Integration	B2E Retail Consumer Get Info	Application Integration	B2E Retail Offers Get Info	Application Integration
Communication Scenario	Communication Type																
360 Overview – Account	Application Integration																
AFS Business Attribute and Assignment Replication	Application Integration																
Account Hierarchy Simple Replication from SAP Business Suite	Application Integration																
Analytics Data Upload	Application Integration																
B2E Retail Characteristics	Application Integration																
B2E Retail Consumer Get Info	Application Integration																
B2E Retail Offers Get Info	Application Integration																

## Step 6

Under **Define Business Data**, select system instance id. Click Value selection.

If you have selected a B2B scenario, enter the ID of the business partner and select the associated Identification type.

Select the communication system that we have created from the list and click **Next**.

System Instance ID	Communication System ID	IDoc Logical System ID
Q5ECLNT400	Q5ECLNT400	Q5ECLNT400
ORDER_123	ORDER_123	
TEST123	TEST123	TEST123
ADIDAS	ADIDAS	
TESTINSTANCE	NEXMOTEST	

## Step 7

In the Define Technical Data step, define the technical settings for inbound and outbound communication. Enter the application method and **Authentication Method** -> **Next**.

Inbound Communication Enabled:	<input checked="" type="checkbox"/>
*Application Protocol:	Web Service
*Authentication Method:	SSL Client Certificate
*User ID:	_TEST123

## Step 8

In the **Review** step, review the data you entered in the previous steps.

To ensure that all data is correct, click **Check Completeness**.

To create and activate your communication arrangement in the system, click **Finish**. You can also save an inactive version of the communication arrangement by **clicking Save as Draft**.

**NEW COMMUNICATION ARRANGEMENT: 360 OVERVIEW – ACCOUNT**

1 Select Scenario   2 Define Business Data   3 Define Technical Data   **4 Review**   5 Confirmation

< Previous   Next >   Finish   Close   Preview   Check Completeness   Save as Draft

**COMMUNICATION SYSTEM**

- System Instance ID: TEST123
- Communication System ID: TEST123
- My System: DM1RQ5O

**CONTACT DATA**

- Contact Name:
- Phone:
- E-Mail:

**Inbound Communication**

Service	Service URL
Manage Revenue Data	<a href="https://my307076.crm.onedemand.com/sap/bc/srt/scs/sap/manageexternalcustomer/piview">https://my307076.crm.onedemand.com/sap/bc/srt/scs/sap/manageexternalcustomer/piview</a>
Query Revenue Data	<a href="https://my307076.crm.onedemand.com/sap/bc/srt/scs/sap/queryexternalcustomer/piviewin">https://my307076.crm.onedemand.com/sap/bc/srt/scs/sap/queryexternalcustomer/piviewin</a>
Manage Recent Order Data	<a href="https://my307076.crm.onedemand.com/sap/bc/srt/scs/sap/manageexternalaggregatedcustom">https://my307076.crm.onedemand.com/sap/bc/srt/scs/sap/manageexternalaggregatedcustom</a>
Query Recent Order Data	<a href="https://my307076.crm.onedemand.com/sap/bc/srt/scs/sap/queryexternalaggregatedcustome">https://my307076.crm.onedemand.com/sap/bc/srt/scs/sap/queryexternalaggregatedcustome</a>

You can also create new communication scenario by going to **Administrator work center -> Communication scenario**.

## 25. SAP C4C – Integration with Outlook

In SAP C4C, you can also integrate your cloud solution with your email using Add In for Microsoft Outlook to support sales, service and marketing scenarios.

To ensure integration between C4C and Outlook, you need to ensure scoping is selected at the time of project implementation.

All users who wants to use SAP C4C with Outlook, they should install **Add-in** on their computers. **Add in** can be downloaded from the solution and steps should be followed in the set up wizard to complete the installation.

The screenshot shows the SAP C4C interface. At the top, there is a navigation bar with links: Personalisieren, Anpassen, Zu SAP Store wechseln, Downloads, and a user icon. Below the navigation bar, there is a horizontal menu with tabs: KONTAKT, AKTIVITÄTEN, LEADS, OPPORTUNITYS, NOTIZEN, FEED, and ADRESSEN. The ADRESSEN tab is currently selected. Under the tabs, there is a table with columns: Telefon, Hauptadresse, Warenempfänger, Rechnungsemp..., and Aktion. The table contains one row of data: 336 München / ... and +49 8941615240. There is a 'Hinzufügen' button with a gear icon above the table. A green arrow points from the bottom right towards the 'Downloads' link in the top right corner of the interface.

The screenshot shows the SAP C4C Downloads page. It displays four download options:

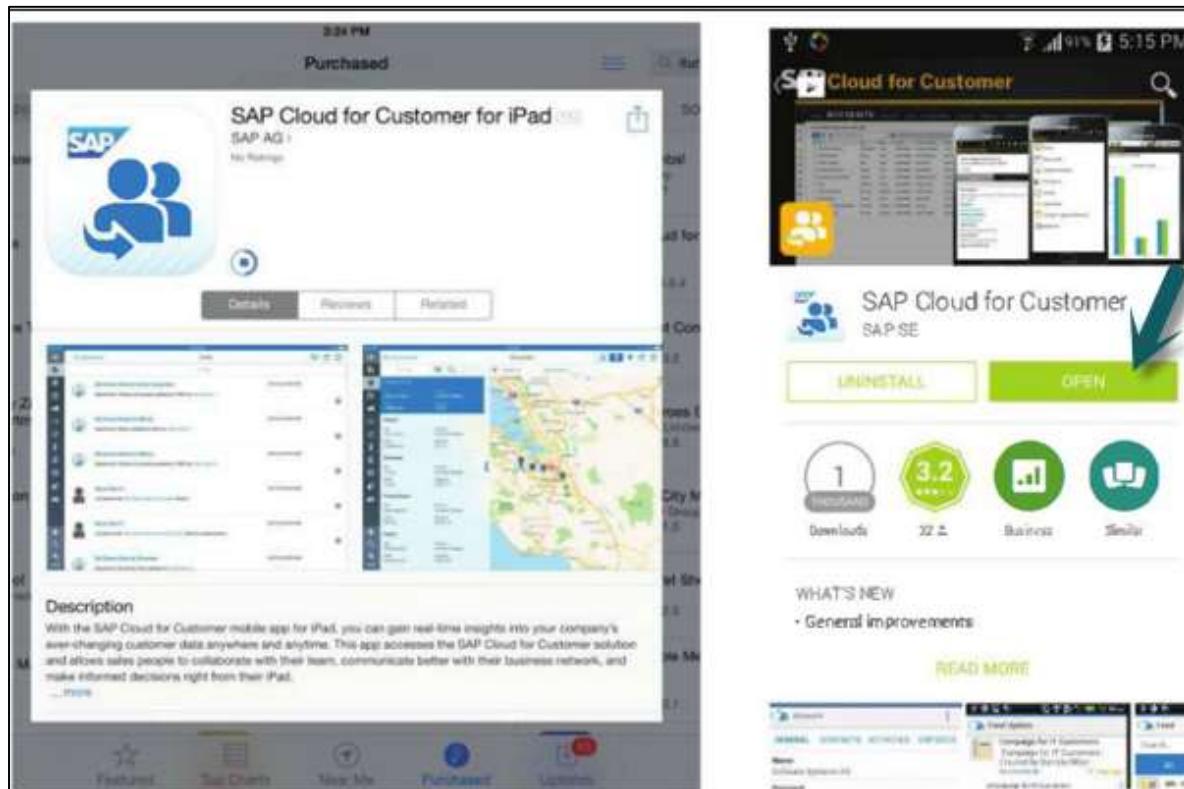
- Add-In for Microsoft Outlook®**: 7 MB, DOWNLOAD button (highlighted with a green arrow).
- Add-In for Microsoft Excel®**: 10.8 MB
- SAP Cloud for Customer for iPad**: 13 MB
- SAP Cloud for Customer for Android**: 1.6 MB

Each item has a small icon and a brief description. The 'DOWNLOAD' button for the Microsoft Outlook add-in is specifically highlighted with a green arrow.

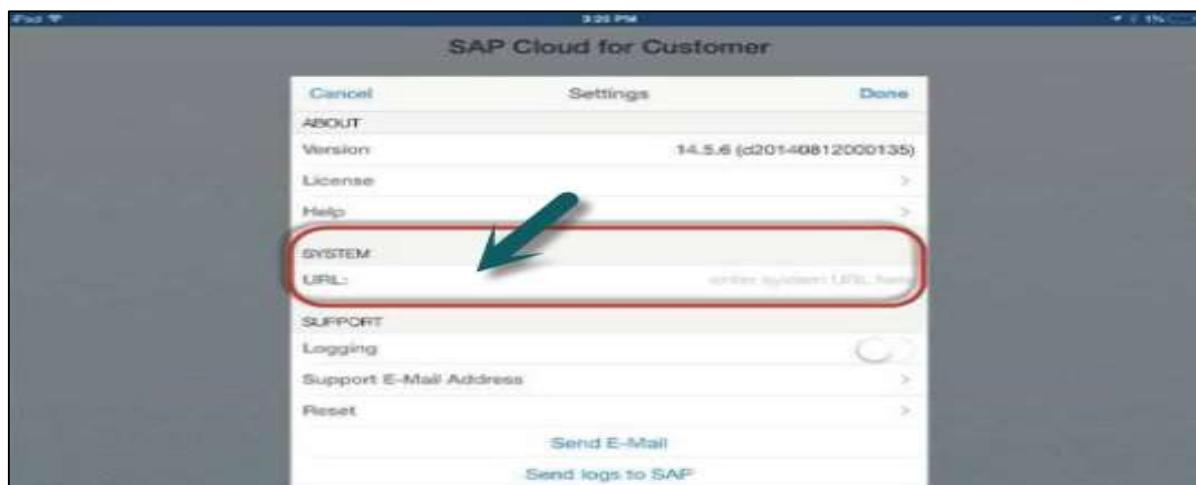
## 26. SAP C4C – Mobile

You can access SAP Cloud for Customer using native apps available for mobile devices. There are different native apps for C4C cloud platforms. Apart from the native app, you can also access cloud solution on HTML browser using client.

SAP C4C native app can be downloaded from the play store.

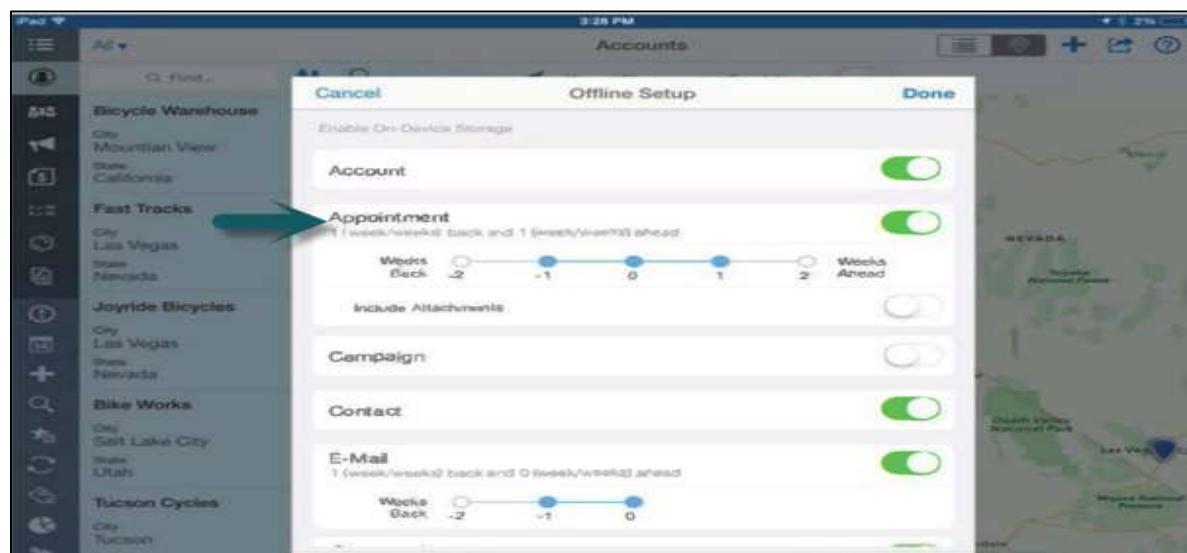


To set up the connection, you have to enter system URL under settings. Enter user name and password.





You can access different components- Appointment, Campaign, contact, email, etc.



## 27. SAP C4C – Mashups

In SAP C4C, you can integrate data from applications and online web services using mashups. There are various preconfigured mashups in the system that can be used for data integration.

- URL Mashups
- HTML Mashups
- Data Mashups
- Custom Mashups

To create a mashup in C4C system, navigate to **Administration -> Business flexibility -> Mashup authoring.**



Click **New**, and select type of Mashup.

**BUSINESS FLEXIBILITY: MASHUP AUTHORIZING**

Show:	All Mashups	and Find	Go	Edit	New	Delete	Deactiv
Status	API Keys	Mashup ID	Mashup Name	URL Mashup	Category		
Active	<input type="radio"/>	CM00017	Nespresso - hybris Customer profile - Checkout Pre...	Data Mashup	Integration		
Active	<input type="radio"/>	CM00018	Nespresso - hybris Order Capsules	HTML Mashup	Integration		
Active	<input type="radio"/>	CM00030	abc	Business & Finance			
Active	<input type="radio"/>	CM00002	BW Report Days Sales Outstanding (DSO)	Business & Finance			
Active	<input type="radio"/>	CM00014	CEI Account View	Business & Finance			
Active	<input type="radio"/>	BYD_COD/AVENT...	Company Information from Avention	Business & Finance			
Active	<input type="radio"/>	SM00076	Credit Card Registration (wirecard.com)	Business & Finance			
Active	<input type="radio"/>	CM00015	Customer 360 Dashboard	Business & Finance			
Active	<input type="radio"/>	CM00049	Flipkart	Business & Finance			
Active	<input type="radio"/>	CM00050	FLIPKART1	Business & Finance			

Show: **URL Mashups**

Name	Category	Visible
SAP (sap.com)		<input type="checkbox"/>
SAP Community (sap.com)		<input type="checkbox"/>
 Business & Finance	Business & Finance	<input checked="" type="checkbox"/>

Enter the name of Mashup at the bottom, and active is selected. You need to enter the specific URL for tracking. Once you are done, click **Save**.