

C4H440

SAP Cloud for Customer Administration

COURSE OUTLINE

Course Version: 2311

Course Duration:

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Typographic Conventions

American English is the standard used in this handbook.

The following typographic conventions are also used.

| | |
|--|---|
| This information is displayed in the instructor's presentation |  |
| Demonstration |  |
| Procedure |  |
| Warning or Caution |  |
| Hint |  |
| Related or Additional Information |  |
| Facilitated Discussion |  |
| User interface control | <i>Example text</i> |
| Window title | <i>Example text</i> |

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Course Overview

TARGET AUDIENCE

This course is intended for the following audiences:

- Project Manager
- Business Process Architect
- System Administrator

Lesson 1: Articulating the Functional Capabilities of SAP Cloud for Customer

Lesson Objectives

After completing this lesson, you will be able to:

- Articulate the Functional Capabilities of SAP Customer Experience
- Describe the tenant landscapes
- Understand the upgrade process
- Locate the resources available to support SAP Customer Experience including the Business Center for Cloud Solutions, SAP Help Portal, and SAP Customer Experience on YouTube
- Participate in SAP Customer Experience Communities

Lesson 1: Preparing for the Implementation Project

Lesson Objectives

After completing this lesson, you will be able to:

- Prepare the tenant by creating a service agent and adjusting scoping
- Navigate, search, and locate items in the solution
- Report an incident to SAP Support

Lesson 2: Describing Fine Tuning

Lesson Objectives

After completing this lesson, you will be able to:

- Understand fine tuning and its role in the overall project setup
- Explain the difference between scoping and fine tuning
- Complete fine-tuning activities to support sales, service, and marketing business processes
- Confirm your customer's configuration decisions
- Conduct fine-tuning activities to meet your customer's business requirements
- Configure the sales cycle and sales phases
- Maintain territories and create realignment runs
- Define a sales process using the sales assistant
- Set up service levels and service categories

Lesson 3: Describing Q-Gates

Lesson Objectives

After completing this lesson, you will be able to:

- List the critical steps to follow to ensure a successful project kickoff

Lesson 1: Understanding the Basic Functions of Account and Contact Management

Lesson Objectives

After completing this lesson, you will be able to:

- Understand the basic functions of account and contact management
- Create different transactions from account management

Lesson 1: Understanding Products and Price List Concepts in SAP Sales Cloud

Lesson Objectives

After completing this lesson, you will be able to:

- Understand products and price list concepts in SAP Sales Cloud
- Understand competitor and registered products concepts
- Create products and price lists

Lesson 1: Explaining the Role of an Organizational Structure in the Solution

Lesson Objectives

After completing this lesson, you will be able to:

- Explain the role of an organizational structure in the solution
- Set up an organizational structure that reflects your customer's business requirements

Lesson 1: Defining Complex Territory Hierarchy Structures

Lesson Objectives

After completing this lesson, you will be able to:

- Define complex territory hierarchy structures
- Assign the same account to one or more territories
- Define territory assignment rules
- Configure territory management

Lesson 1: Maintaining Employees and Explaining What a Business User Is

Lesson Objectives

After completing this lesson, you will be able to:

- Maintain employees and explain what a business user is
- Maintain business roles and assign them to business users
- Explain and set up user access rights and restrictions

Lesson 1: Understanding Data Migration

Lesson Objectives

After completing this lesson, you will be able to:

- Guide your customer on which data should be migrated
- Complete data migration templates and files
- Migrate data into SAP Sales Cloud/SAP Service Cloud
- Update business data using mass data maintenance
- Troubleshoot data migration issues

Lesson 1: Describing Integration Scenarios with SAP CRM and SAP S/4HANA

Lesson Objectives

After completing this lesson, you will be able to:

- Describe integration scenarios with SAP CRM and SAP S/4HANA
- Describe good project management practices for integration

Lesson 2: Describing Integration with Microsoft Outlook

Lesson Objectives

After completing this lesson, you will be able to:

- Describe integration with Microsoft Outlook

Lesson 3: Describing Integration with Field Service Management

Lesson Objectives

After completing this lesson, you will be able to:

- Describe Integration with Field Service Management

Lesson 4: Describing the Benefits of Integration with Social Media

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the benefits of integration with SAP Jam
- Describe integration with social media in SAP Cloud for Social Engagement

Lesson 1: Setting Up Workflows and Approval Processes

Lesson Objectives

After completing this lesson, you will be able to:

- Set up workflows and approval processes
- Configure conditions and actions for workflows

Lesson 1: Describing How to Use Personalization and Adaptation

Lesson Objectives

After completing this lesson, you will be able to:

- Describe how to use personalization and adaptation
- Define a new field
- Define a page layout for a role
- Restrict dropdown list values
- Modify an existing output form
- Describe how to translate and adapt UI texts
- Explain custom business objects
- Perform content transfer
- Create a mashup

Lesson 1: Exploring the Standard Reports and Creating or Modifying Views for Those Reports

Lesson Objectives

After completing this lesson, you will be able to:

- Explore the standard reports and create or modify views for those reports
- Create a custom report
- Create an interactive dashboard
- Explain the major analytics features available with SAP Customer Experience
- Describe options for integration of reporting with SAP Business Warehouse

Lesson 1: Describing the Different Mobile Access Options

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the different mobile access options
- Understand the minimum device requirements for mobile
- Configure offline settings for mobile
- Download and configure mobile apps

Lesson 1: Describing the Necessary Go-Live Activities

Lesson Objectives

After completing this lesson, you will be able to:

- Describe roles and responsibilities after go-live
- Describe change projects
- Describe tenant landscape recommendations
- Describe tenant copies

Lesson 1: Preparing for Solution Walkthrough

Lesson Objectives

After completing this lesson, you will be able to:

- Prepare an SAP Sales Cloud/SAP Service Cloud environment for solution walkthrough
- List the steps for a solution walkthrough
- Conduct a solution walkthrough