

# C4H470

## SAP Sales Cloud Version 2

### **COURSE OUTLINE**

Course Version: 2505

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:

- Business User
- Application Consultant
- Super / Key / Power User
- System Administrator



## **Lesson 1: Getting an overview about SAP Sales Cloud Version 2**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Identify key capabilities of SAP Sales Cloud Version 2

## **Lesson 2: Navigating Essentials in SAP Sales Cloud Version 2**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Accessing and navigating within SAP Sales Cloud Version 2.



## Lesson 1: Understanding the Daily Tasks of Sales Representatives

### Lesson Objectives

After completing this lesson, you will be able to:

- Identifying daily tasks for business users with leads, Use of playbooks and leverage lead scoring.

## Lesson 2: Mastering Playbooks: Introduction, Setup, and Guided Selling in Opportunities

### Lesson Objectives

After completing this lesson, you will be able to:

- Introducing, Setting Up Playbooks and Use Guided Selling in Opportunities.

## Lesson 3: Managing Sales Quotes

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain the Advantages of Utilizing Sales Quotations.

## Lesson 4: Utilizing Sales Orders

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain the usage Sales Order.

## Lesson 5: Navigating Task Management and Digital Selling Workspace

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain the benefits of the Digital Selling Workspace and how to manage tasks with Task Manager. Describe the advantages of using My Call Lists, due Leads, Opportunities, and Tasks in the Digital Selling Workspace.

## **Lesson 6: Understanding Visit Management**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Explain the benefits of Visit Management.

## Lesson 1: Understanding the Daily Tasks of Sales Managers

### Lesson Objectives

After completing this lesson, you will be able to:

- Identify key the daily tasks of a Sales Manager

## Lesson 2: Optimizing Playbooks: Guidance for Sales Representatives and KPI Evaluation

### Lesson Objectives

After completing this lesson, you will be able to:

- Utilize Playbooks from the Sales Manager Perspective.

## Lesson 3: Streamlining Pipeline and Process Flow with Trends Analytics

### Lesson Objectives

After completing this lesson, you will be able to:

- Optimize pipeline management and process flow by effectively using trends analytics to identify patterns and improve efficiency.



## Lesson 1: Core Responsibilities and Tools for Administrators

### Lesson Objectives

After completing this lesson, you will be able to:

- Understand the key responsibilities of an administrator, including console navigation, basic configuration management, personalized settings, daily tasks, account and contact management, and product management best practices.

## Lesson 2: Advanced Configurations and Automation

### Lesson Objectives

After completing this lesson, you will be able to:

- Master advanced administrative tasks by understanding best practices for data migration, implementing and personalizing system customizations, exploring extensibility options, and effectively using validation and determination rules, as well as generating automated workflows.



## Lesson 1: Lead Management Configuration

### Lesson Objectives

After completing this lesson, you will be able to:

- Gain proficiency in managing leads by understanding the Leads Settings view, configuring lead statuses, sources, qualifications, party schema, and routing to employees.

## Lesson 2: Opportunity Management Configuration

### Lesson Objectives

After completing this lesson, you will be able to:

- Master the configuration of opportunity management by understanding the Opportunities Settings view, setting up general and document settings, managing sources and party schemas, configuring sales cycles, categories, and reasons, and handling forecast categories, contact roles, and statuses.

## Lesson 3: Configuring Pipeline and Sales Forecasting

### Lesson Objectives

After completing this lesson, you will be able to:

- Gain the skills to configure and manage pipeline processes and sales forecasting models, ensuring accurate tracking and optimization of sales opportunities and outcomes.

## Lesson 4: Quote Management Configuration

### Lesson Objectives

After completing this lesson, you will be able to:

- Develop the skills to effectively manage quote settings by understanding the Quotes Settings view, configuring document and item types, defining reasons for progress, and customizing the party schema for quotes.

## Lesson 5: Configuring Pricing Strategies

### Lesson Objectives

After completing this lesson, you will be able to:

- Develop the ability to configure and manage effective pricing strategies, including setting up price lists, discounts, and managing price updates to optimize sales outcomes.

## **Lesson 6: Sales Order Configuration**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Gain expertise in managing and configuring sales orders by understanding the overview of sales order management and integrating sales orders through effective configuration of settings and workflows.

## **Lesson 7: Visits Configuration**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Gain expertise in managing and configuring Visits.

## **Lesson 8: Configuring Call Lists and Outreach Planning**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Acquire the skills to configure and manage call lists and outreach planning, enabling efficient organization, prioritization, and scheduling of sales activities to enhance engagement and productivity.

## **Lesson 9: Configuring Sales Activities**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Develop the ability to configure and manage sales activities, including task setup, scheduling, and tracking, to streamline sales processes and enhance overall productivity.

## Lesson 1: MS Teams Integration: Enhancing Collaboration

### Lesson Objectives

After completing this lesson, you will be able to:

- Learn how to integrate MS Teams to enhance collaboration by streamlining communication and improving teamwork within your organization.

## Lesson 2: Streamlining Communication Channels

### Lesson Objectives

After completing this lesson, you will be able to:

- Learn strategies to streamline communication channels to improve efficiency, reduce redundancy, and enhance overall organizational communication.

## Lesson 3: Understanding Relationship Intelligence

### Lesson Objectives

After completing this lesson, you will be able to:

- Gain a comprehensive understanding of relationship intelligence to improve interpersonal interactions, enhance collaboration, and build stronger professional connections.



## **Lesson 1: Leveraging Machine Learning for Intelligent Sales and Lead Scoring**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Develop the skills to leverage machine learning techniques for enhancing sales strategies and optimizing lead scoring, enabling more accurate predictions and improved decision-making in sales processes.

## **Lesson 2: Configuring Gen AI and CX AI Toolkit**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Understand the usage and configuration of generative AI in various Sales processes.



## Lesson 1: Working with the Mobile App

### Lesson Objectives

After completing this lesson, you will be able to:

- Understand how to use the SAP Sales Cloud Version 2 mobile application to access customer insights and sales transactions, enabling informed decision-making on the go.

## Lesson 2: Setting Up Mobile App Features

### Lesson Objectives

After completing this lesson, you will be able to:

- Develop the ability to configure and customize mobile app features, including user preferences and interface settings, to enhance functionality and improve user experience.

## Lesson 3: Managing Mobile App Integrations and Security

### Lesson Objectives

After completing this lesson, you will be able to:

- Gain the skills to manage mobile app integrations and security settings effectively, ensuring seamless connectivity with other systems and robust protection of data and user access.