



SAP Customer Experience

# SAP Sales Cloud and SAP Service Cloud (C4C) Pre-Release Briefing | **Release 2502 (February 2025)**

SAP Sales and Service Cloud  
January 27th, 2025

PUBLIC

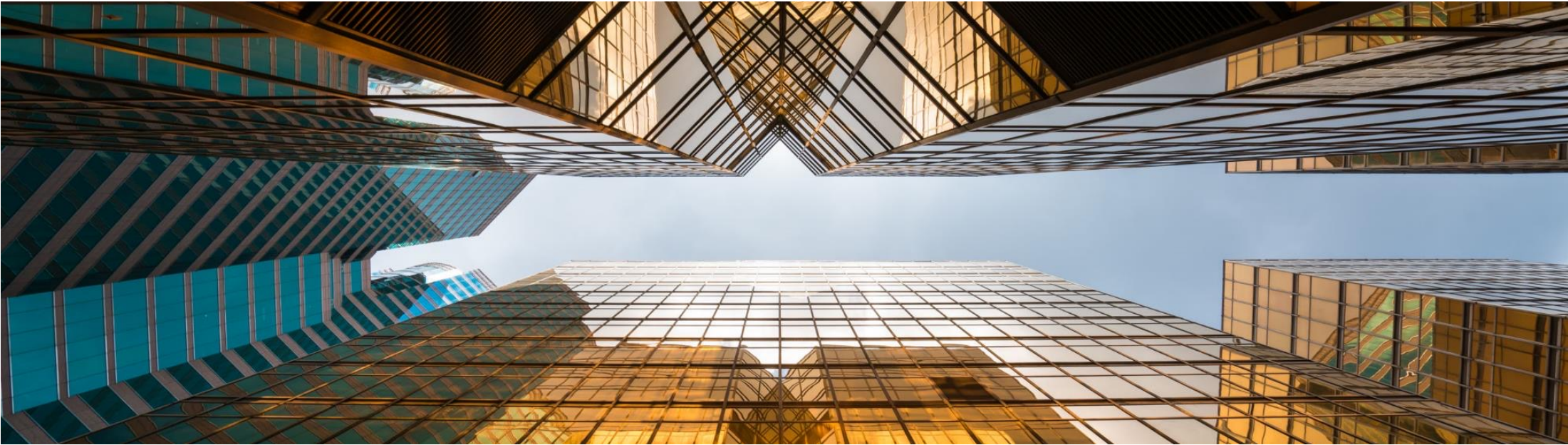
THE BEST RUN 

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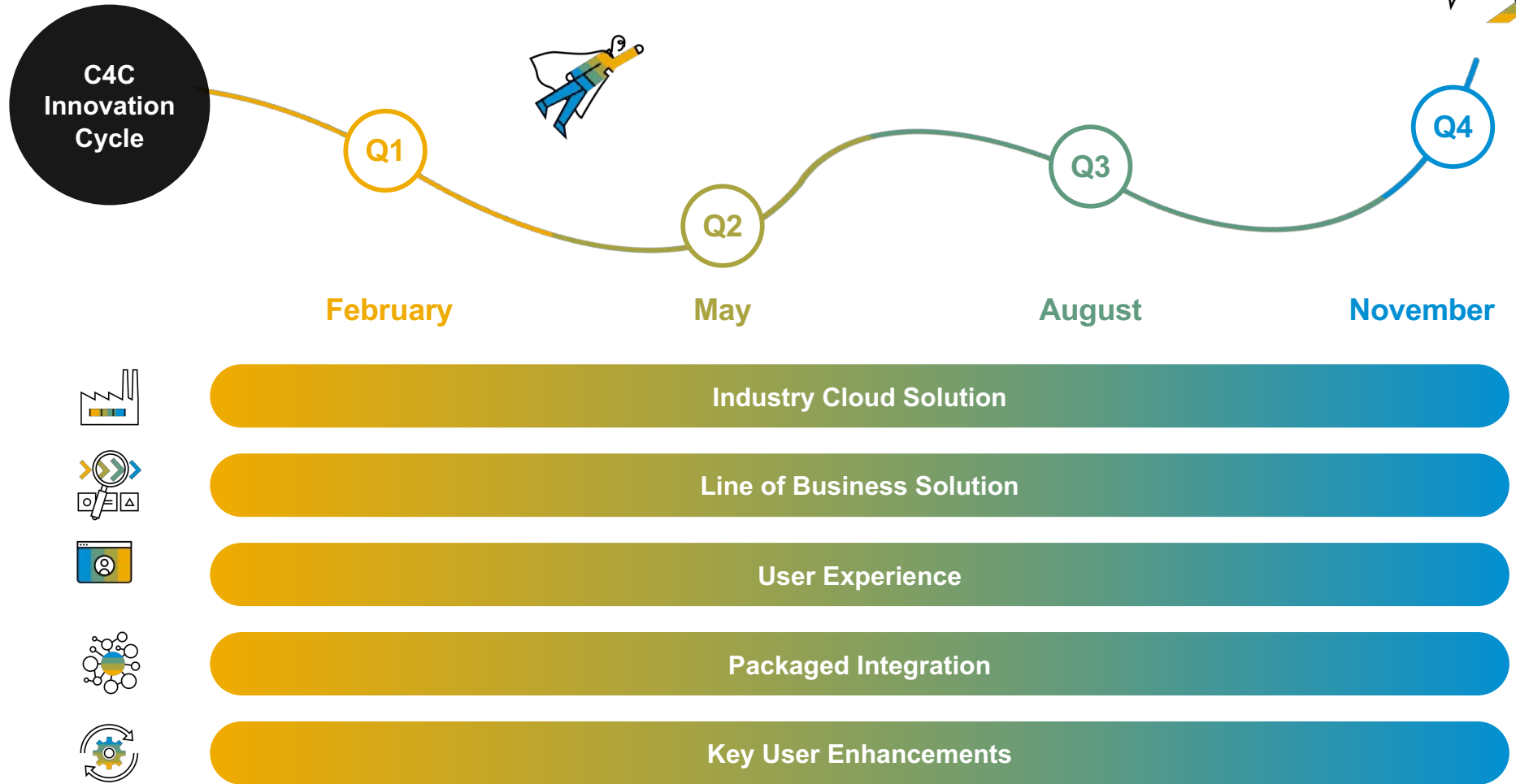
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# Release **Information**



# Enhanced & Updated on a Quarterly Schedule



# February 2025 (2502) Release | **Planned Timeline**

29th January

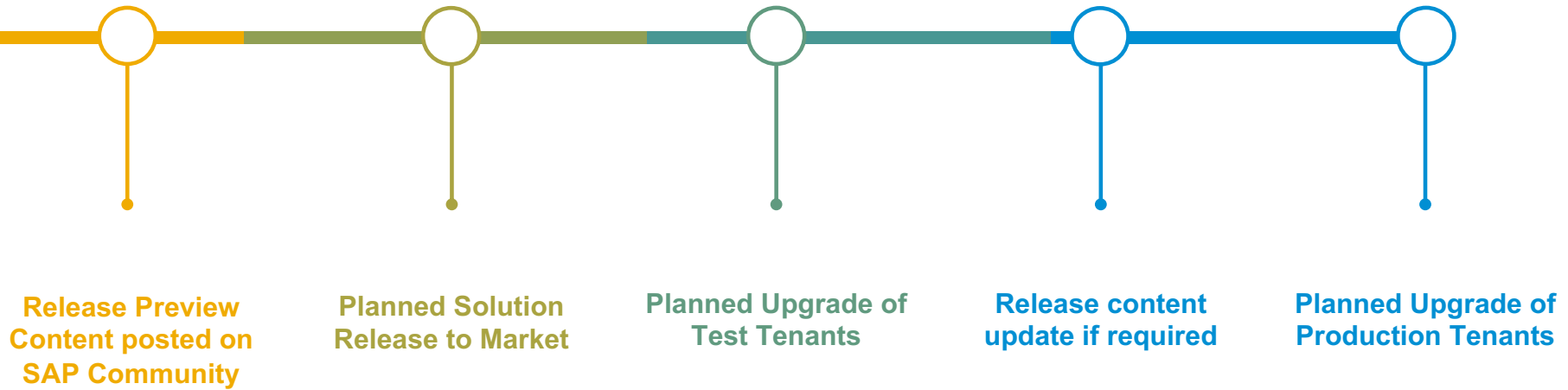
31st January

1st February

13th November

15th February

timeline



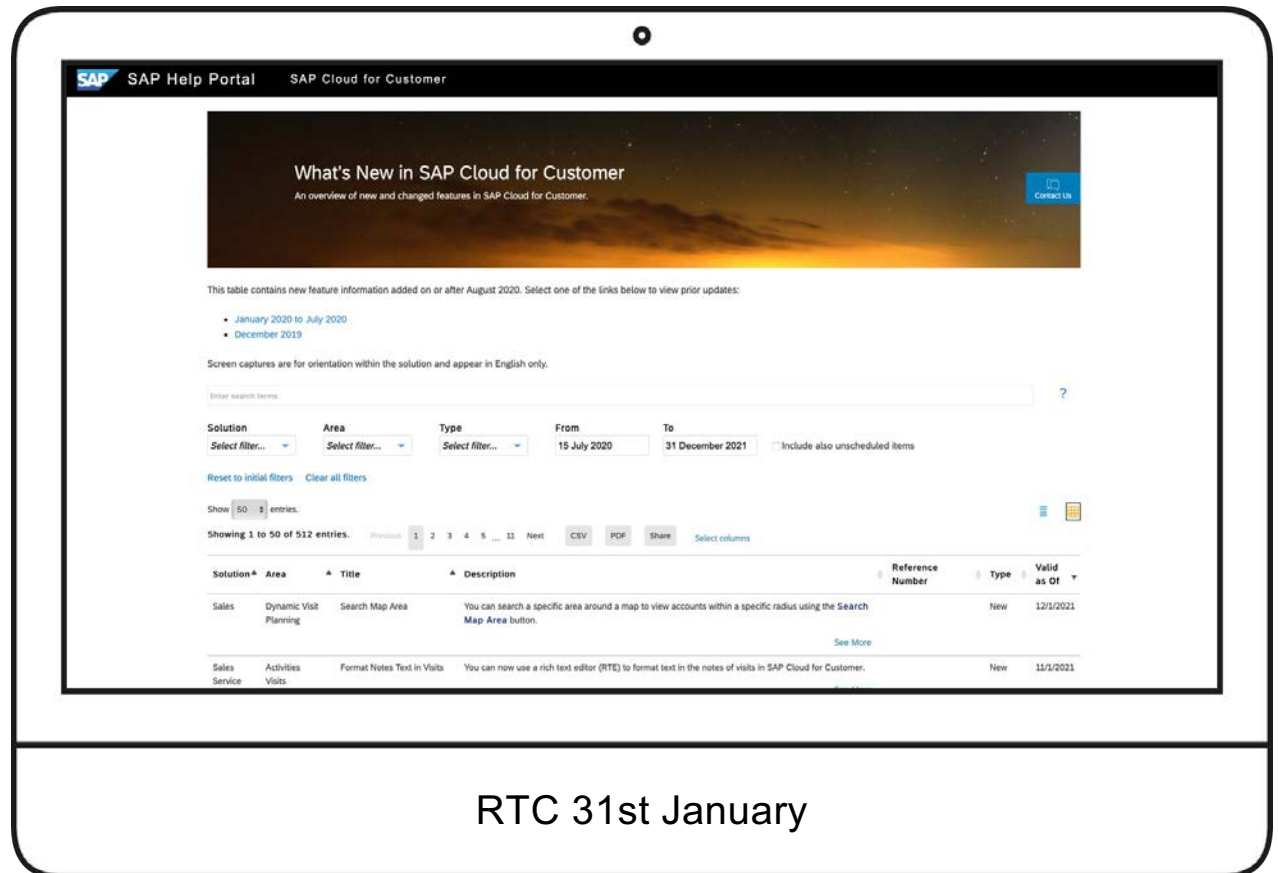


# New Release Information | 2502 Release Notes & Help Content

The Pre-Release Webcast offered for each release is designed to give you consolidated overviews on the key features for a release. These documents are not the sole source of truth about the release. Instead, the on-line help and What's New information is intended for that purpose. The on-line help documentation becomes available to customers on the RTC or Release to Customer date of each release.

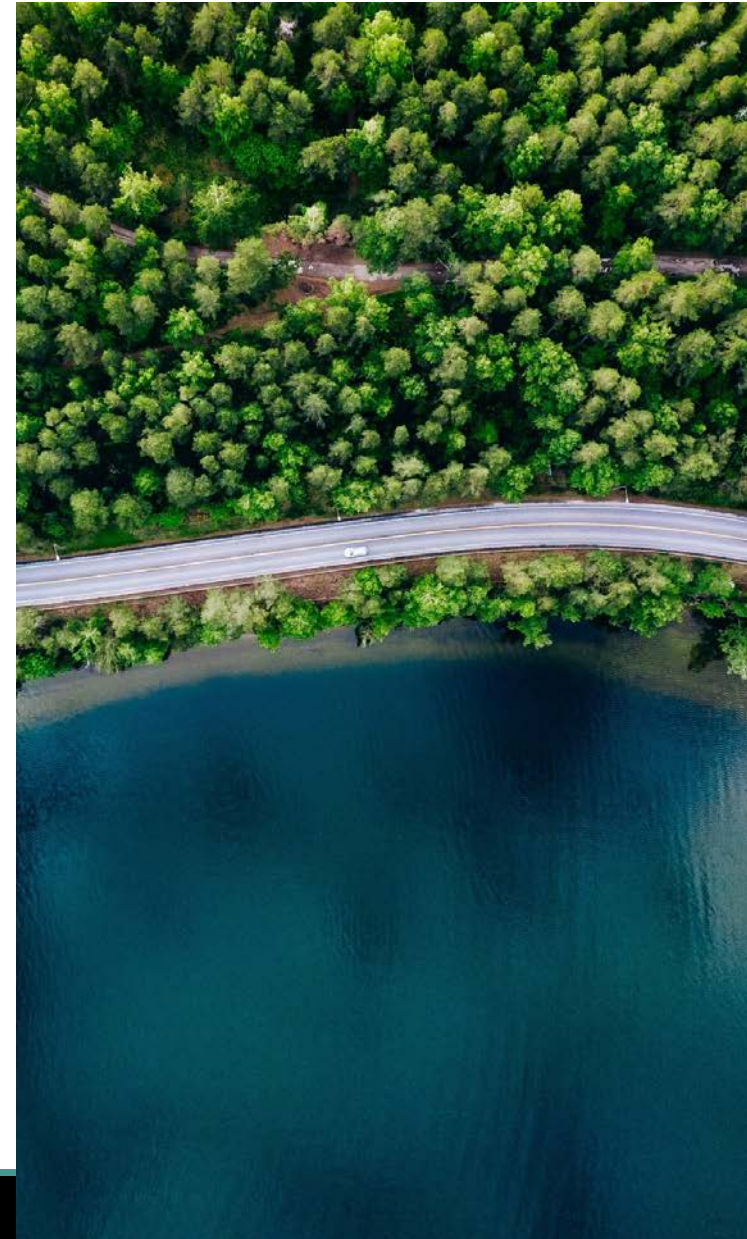
You can find the current help documentation here:

[https://help.sap.com/viewer/product/SAP\\_CLOUD\\_FOR\\_CUSTOMER/CLOUD/en-US?task=discover\\_task](https://help.sap.com/viewer/product/SAP_CLOUD_FOR_CUSTOMER/CLOUD/en-US?task=discover_task)

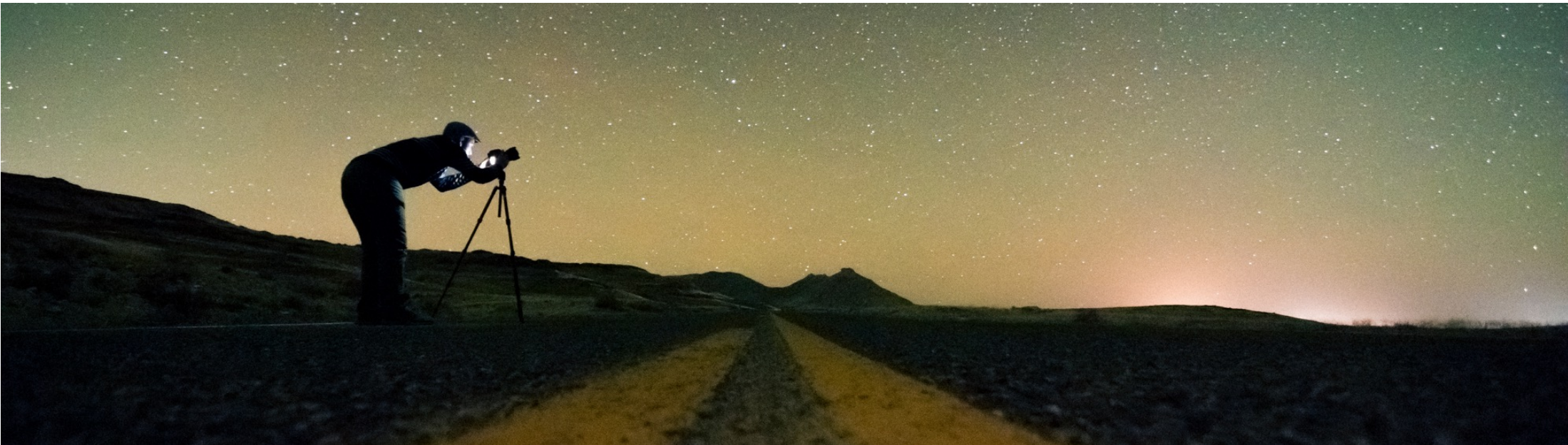


# Agenda

- 1. Introduction**
- 2. Platform & Integration**
- 3. Sales Core**
- 4. Intelligent Sales**
- 5. Dynamic Visit Planning**
- 6. Service**
- 7. Closing**



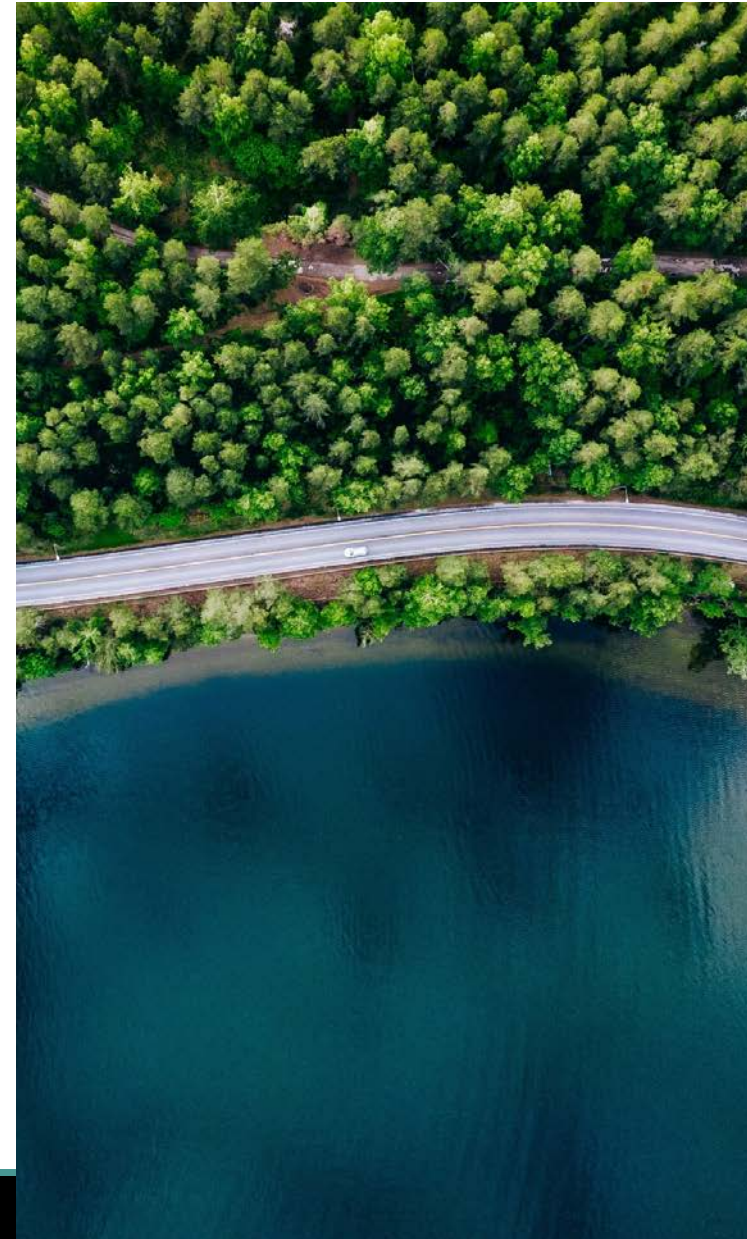
# SAP Sales and Service Core – Platform and Integration





# Agenda: Platform & Integration

1. Workflows
2. Migration V1 to V2



# Platform & Integration | Overview



## Key Innovations

### Workflows

- Use Contact's Language to determine preferred Language in workflow rule



## Enhancements & Round-offs

### V1 to V2 migration

- “Leads” in Data Transfer is supported with restrictions



## Key Innovations

### Use Contact's Language to determine preferred Language in workflow rule

For Workflow emails, email template language selection now has an option to prefer contact language over account language for a main contact recipient

Prerequisites:

- a) The Contact is associated to an account
- b) The Address Determination in Workflow should have the “Use main address of the recipient to send out e-mail and sms” as selected, under Workflow Settings.

### Key Capabilities

- Supporting the use of contact preferred language for workflow rules with email templates in multiple languages and Address Determination enabled in Workflow settings

### Business Benefits

- Possible to communicate with end customers in the language they prefer improving customer experience

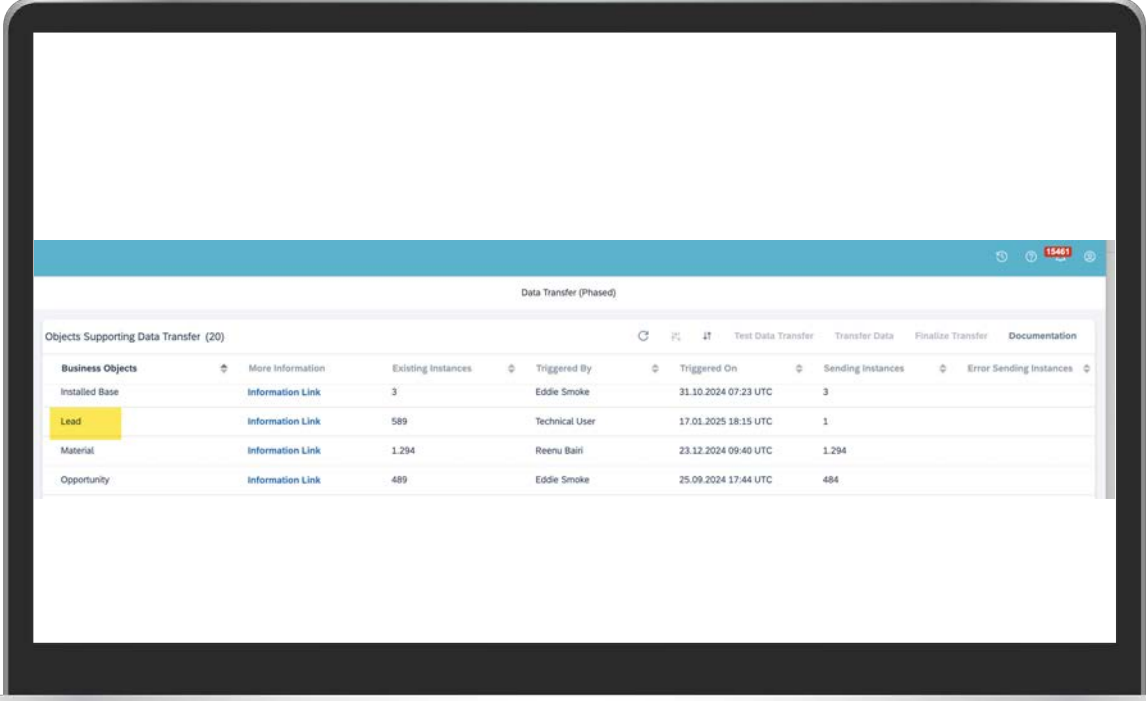
### Getting Started

- If customers prefer to use contact language over account language, a request for activation can be made via support ticket to LOD-CRM-WKF




Available for activation via a support request to LOD-CRM-WKF

## V1 to V2 Transition Tools – Data Transfer Tool | “Leads” support with restrictions



The screenshot shows the SAP Data Transfer (Phased) tool interface. The table displays the following data:

Business Objects	More Information	Existing Instances	Triggered By	Triggered On	Sending Instances	Error Sending Instances
Installed Base	<a href="#">Information Link</a>	3	Eddie Smoke	31.10.2024 07:23 UTC	3	
Lead	<a href="#">Information Link</a>	589	Technical User	17.01.2025 18:15 UTC	1	
Material	<a href="#">Information Link</a>	1.294	Reenu Bairi	23.12.2024 09:40 UTC	1.294	
Opportunity	<a href="#">Information Link</a>	489	Eddie Smoke	25.09.2024 17:44 UTC	484	

 <https://help.sap.com/docs/sap-cloud-for-customer/sap-cloud-for-customer-transition-guide-2d3331cc82f043f198ef4b42104a2fe4/leads>

### Key Capabilities

- Data Transfer tool enhanced with onboarding of “Leads” transition/migration from V1 to V2 with restrictions. For details, refer to above documentation link

### Business Benefits

- Data Transfer tool supports data transfer/migration of both Business Data and related Configuration from V1 to V2 systems

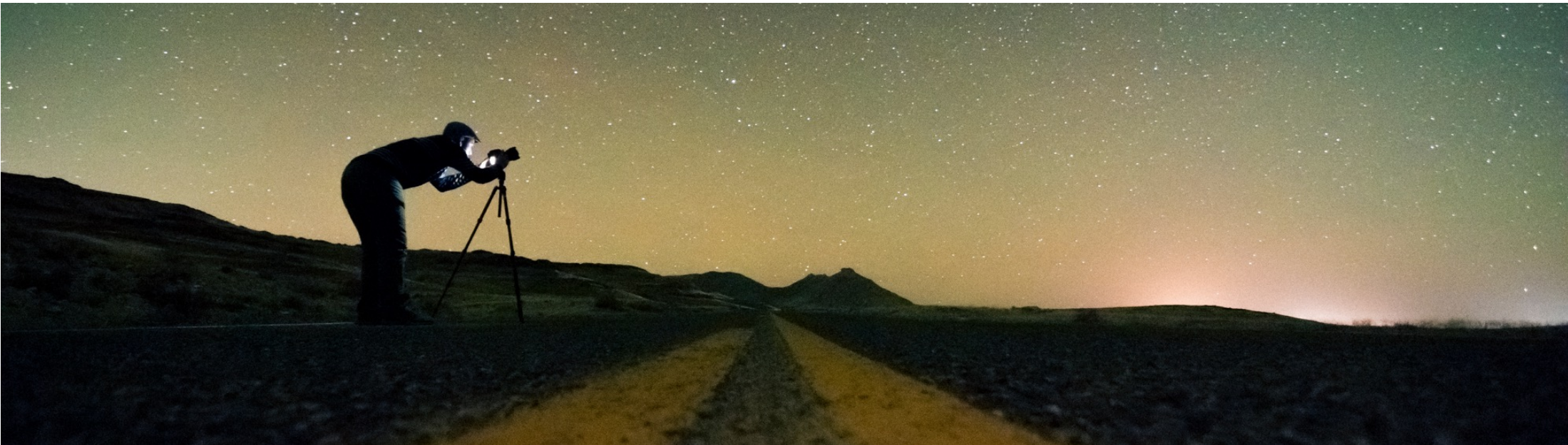
### Getting Started

- Key users can assign Transition Tools -> “Data Transfer” work center view (available under “Transition” Work Center) to an admin user



- “Data Transfer Tool” continues to be on Restricted release and access can be requested via incident on component LOD-LE-MIG-CNS with V2 tenant details.

# SAP Sales and Service Core – Sales



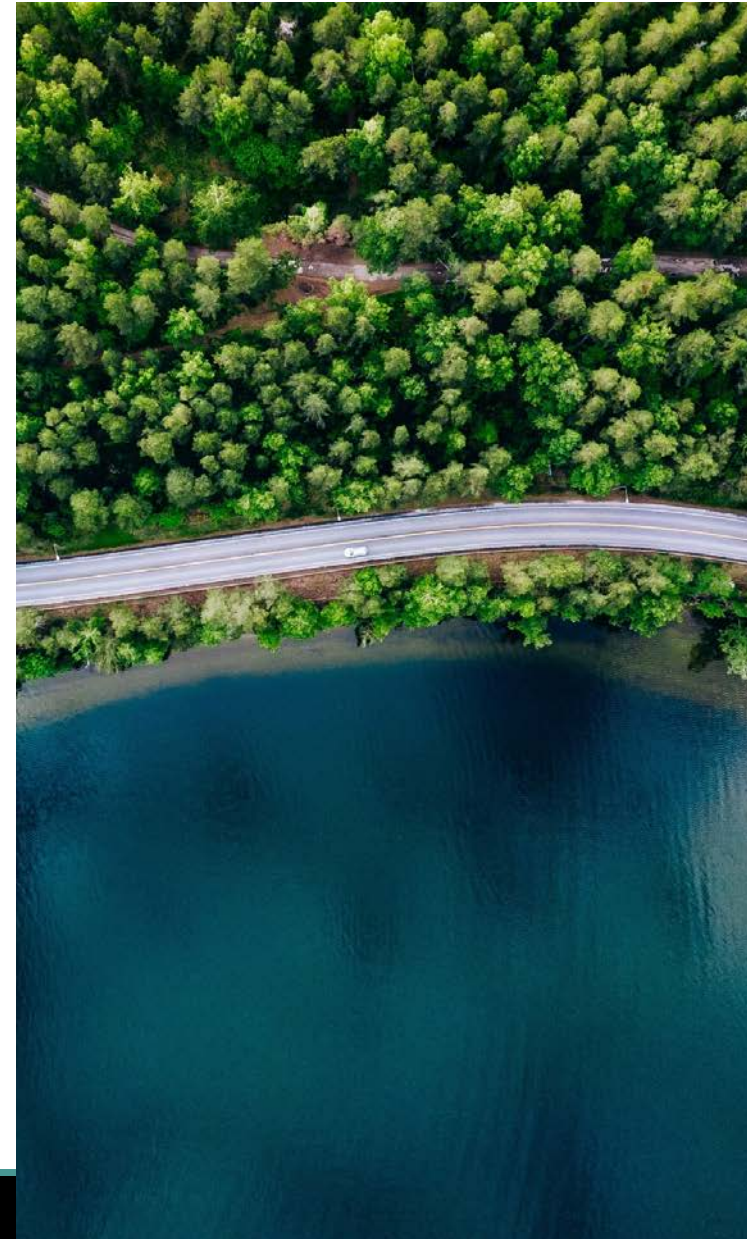
# Agenda: SAP Sales and Service Core - Sales

## 1. SAP Sales Core

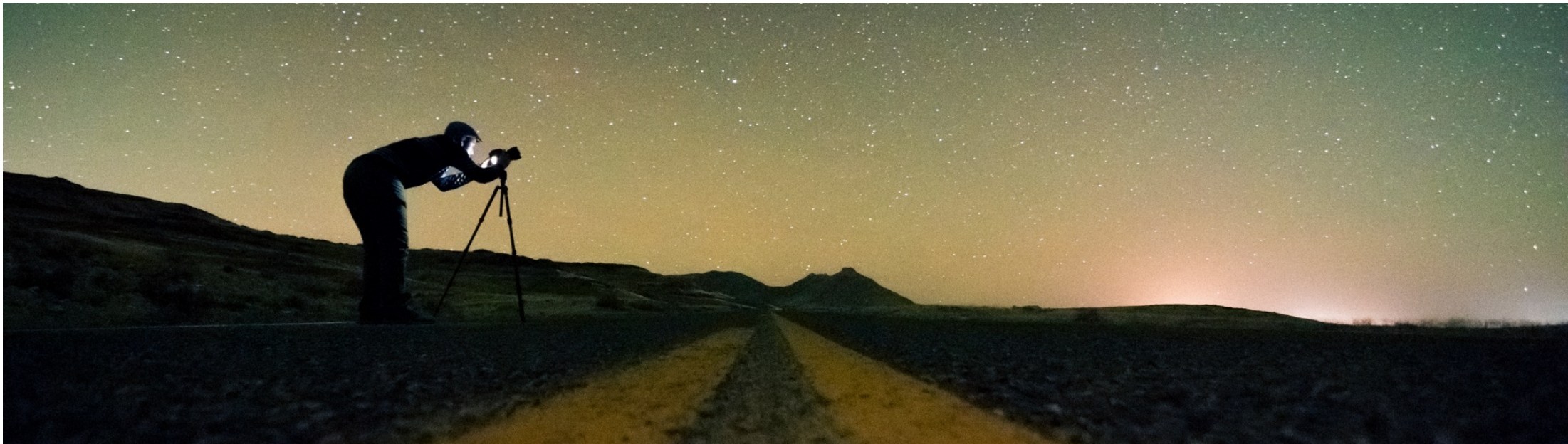
- Groupware Integration

## 2. Intelligent Sales Add-On

## 3. Dynamic Visit Planning Add-On



# What's new in Groupware Integration?



# Groupware Integration | Overview

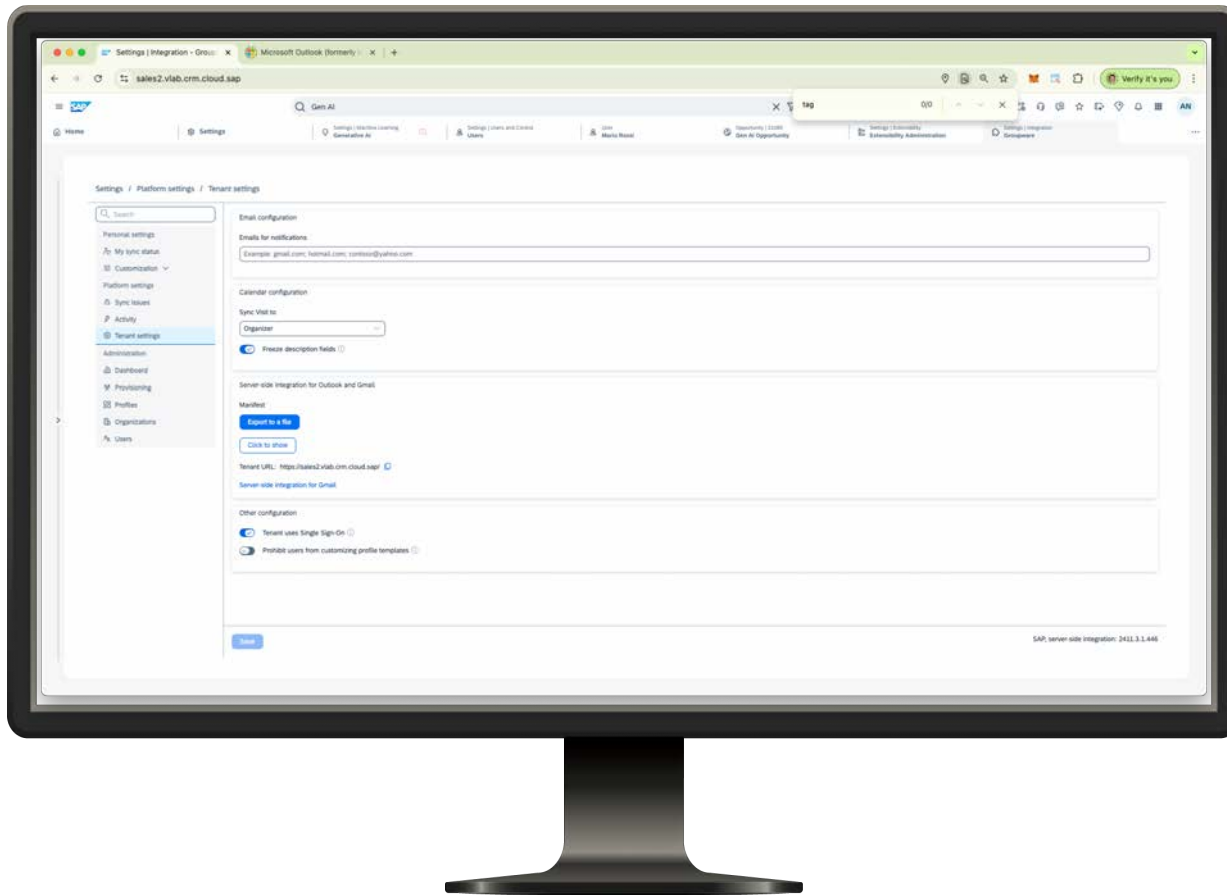


## Enhancements & Round-offs

- Show ServerSync version in Groupware Configuration
- KUT fields renaming
- Support Nested Apps for Microsoft Authentication



# Groupware Integration | Show ServerSync version in Groupware Configuration



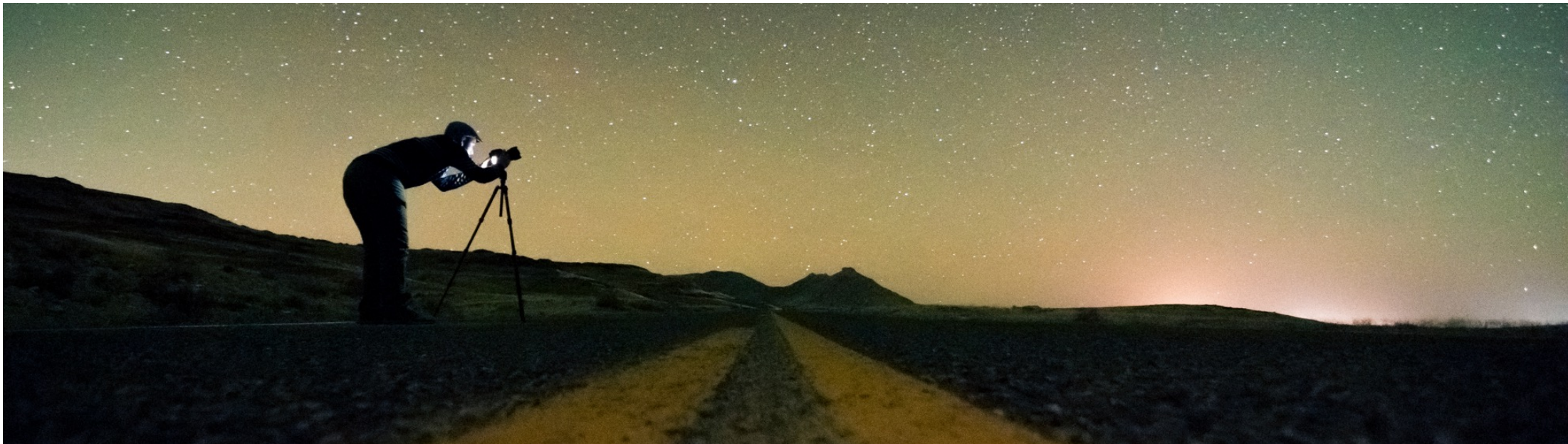
## Key Capabilities

- See the installed version of the app

## Business Benefits

- Compare the Server Side Version to the Microsoft Outlook AddIn.

# What's new in **Intelligent Sales add-on?**



# Intelligent Sales Add-On | Overview



*The following capabilities are available with: SAP Sales and Service Core, intelligent sales add-on*

## Key Innovations

### Intelligent Sales Execution

- Target Plans - Create & Publish Target Plans, Evenly Allocate Plan Value, Plan Value Validation, Revise Target Plans, Sales Unit Sync, Target Plan Lifecycle
- Forecast Tracker - View Targets from Target Plans

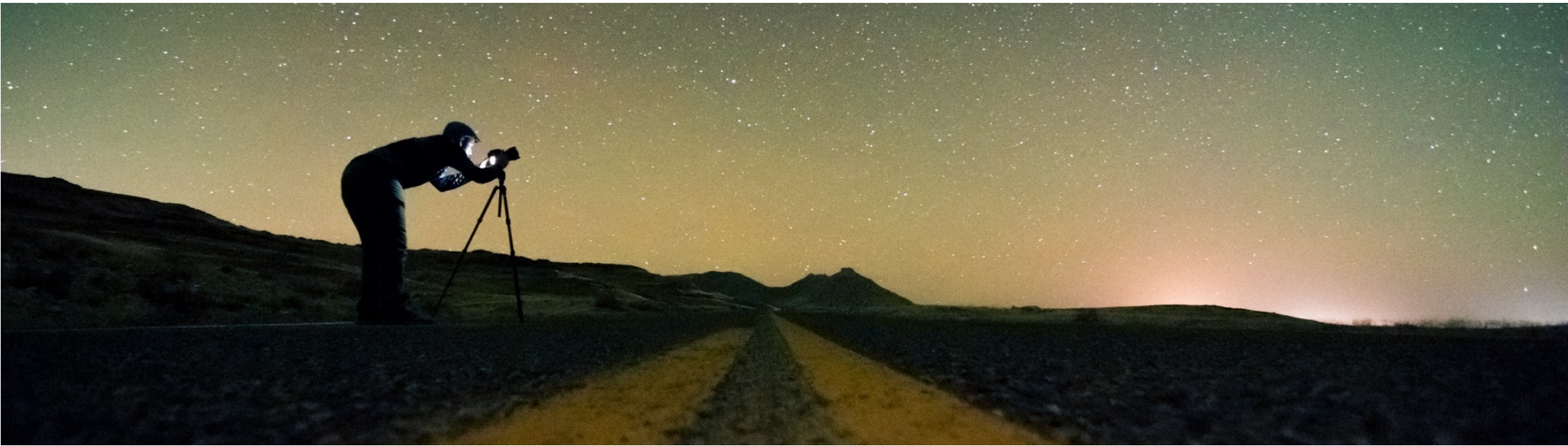
### Relationship Intelligence

- Relationship Intelligence Logs



*SAP Sales and Service Core, intelligent sales add-on is only available in the following Data Centers: Germany, Australia and USA  
SAP Sales and Service Core, intelligent sales add-on cannot be deployed within a Private edition system  
SAP Sales and Service Core, intelligent sales add-on does not support the EUDP access restriction*

# What's new in ISE?





## Key Innovations

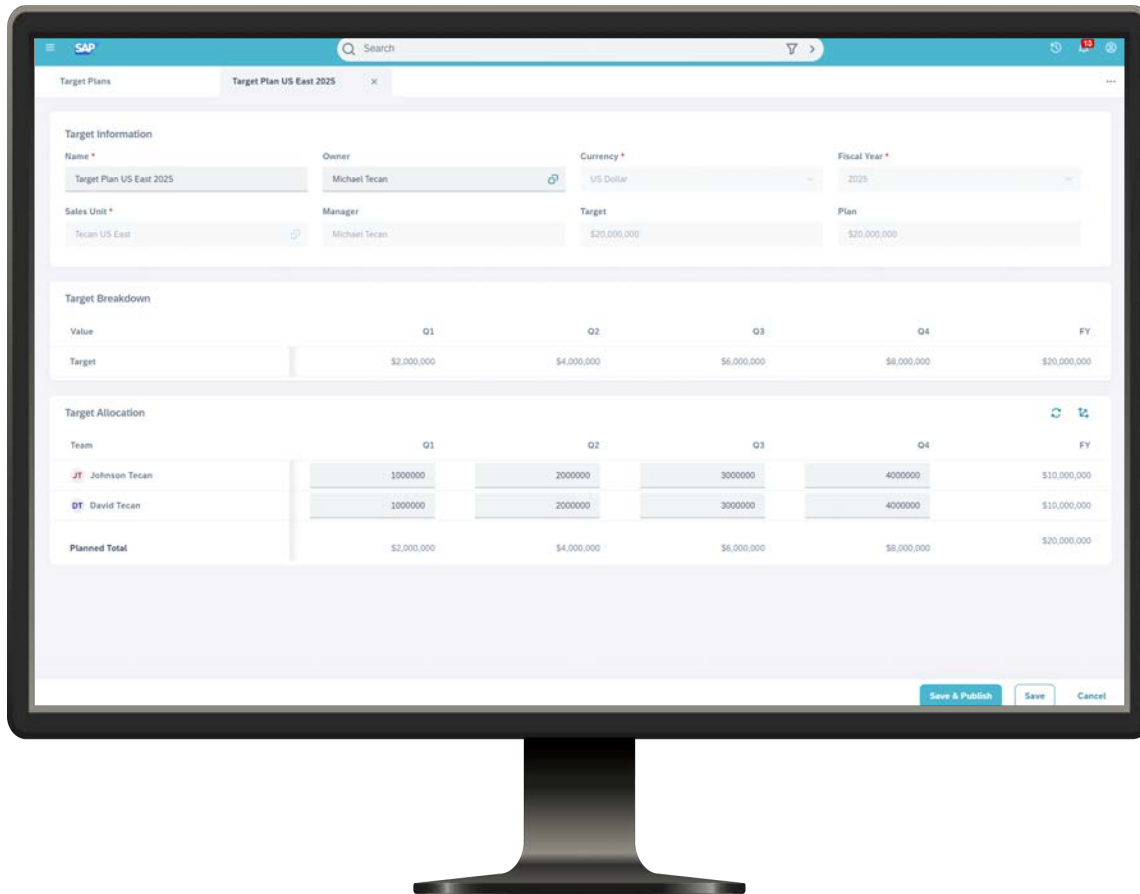
### Target Plans

- Create & Publish Target Plans
- Evenly Allocate Plan Value
- Plan Value Validation
- Revise Target Plans
- Sales Unit Sync
- Target Plan Lifecycle

### Forecast Tracker

- View Targets from Target Plans

# Target Plans | Create & Publish Target Plans



## Key Capabilities

- Sales managers can create a target plan for the responsible sales unit per fiscal year, in a desired currency.
- Target breakdown shows targets for the sales unit per period, which are assigned by the higher level manager.
- Using the targets as a reference, sales managers can allocate plan values to the next immediate level in the hierarchy beneath them.
- Plan totals can exceed the assigned targets to create a buffer, ensuring the team has a better chance of meeting the overall target.
- On publishing the target plan, plan values become targets and get assigned to subordinates.

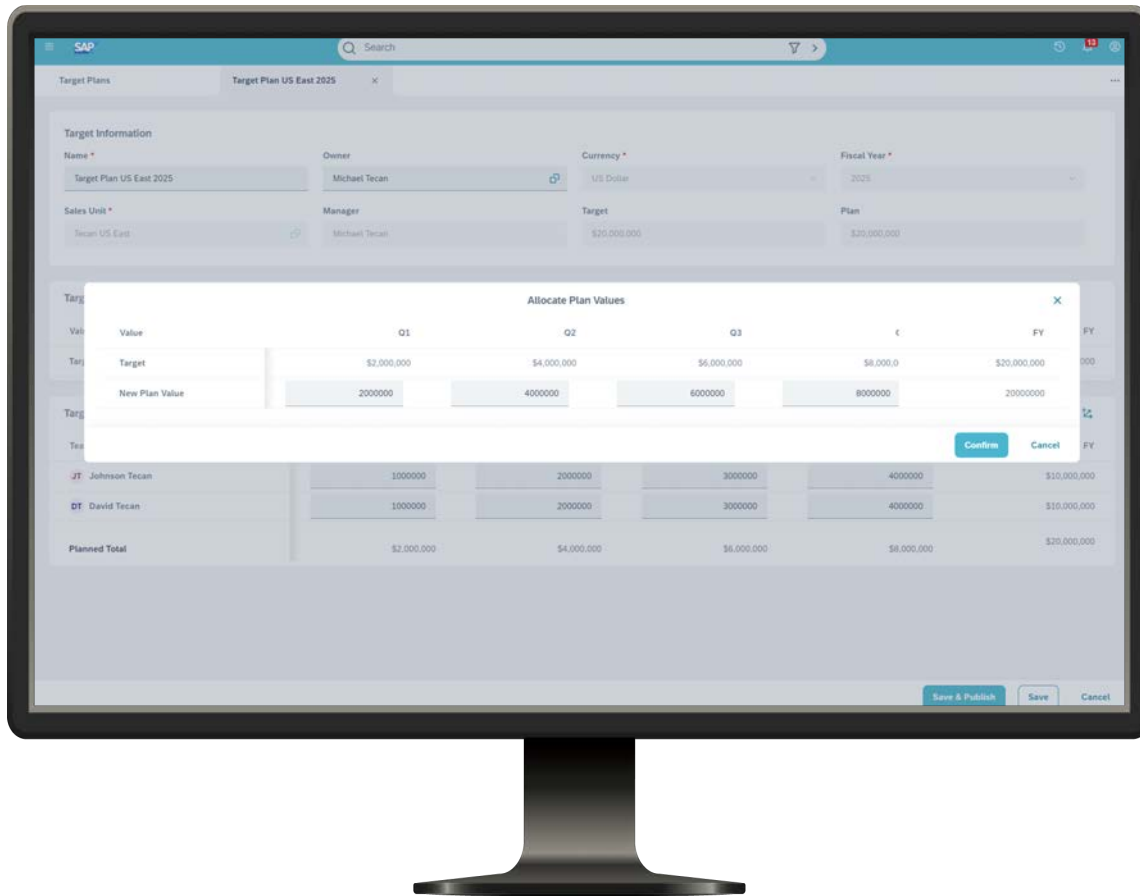
## Business Benefits

- Motivate sales teams to strive toward clearly defined goals with measurable outcomes, fostering accountability

## Getting Started

- Admin must enable Target Plans work center view for desired business roles.

# Target Plans | Evenly Allocate Plan Values



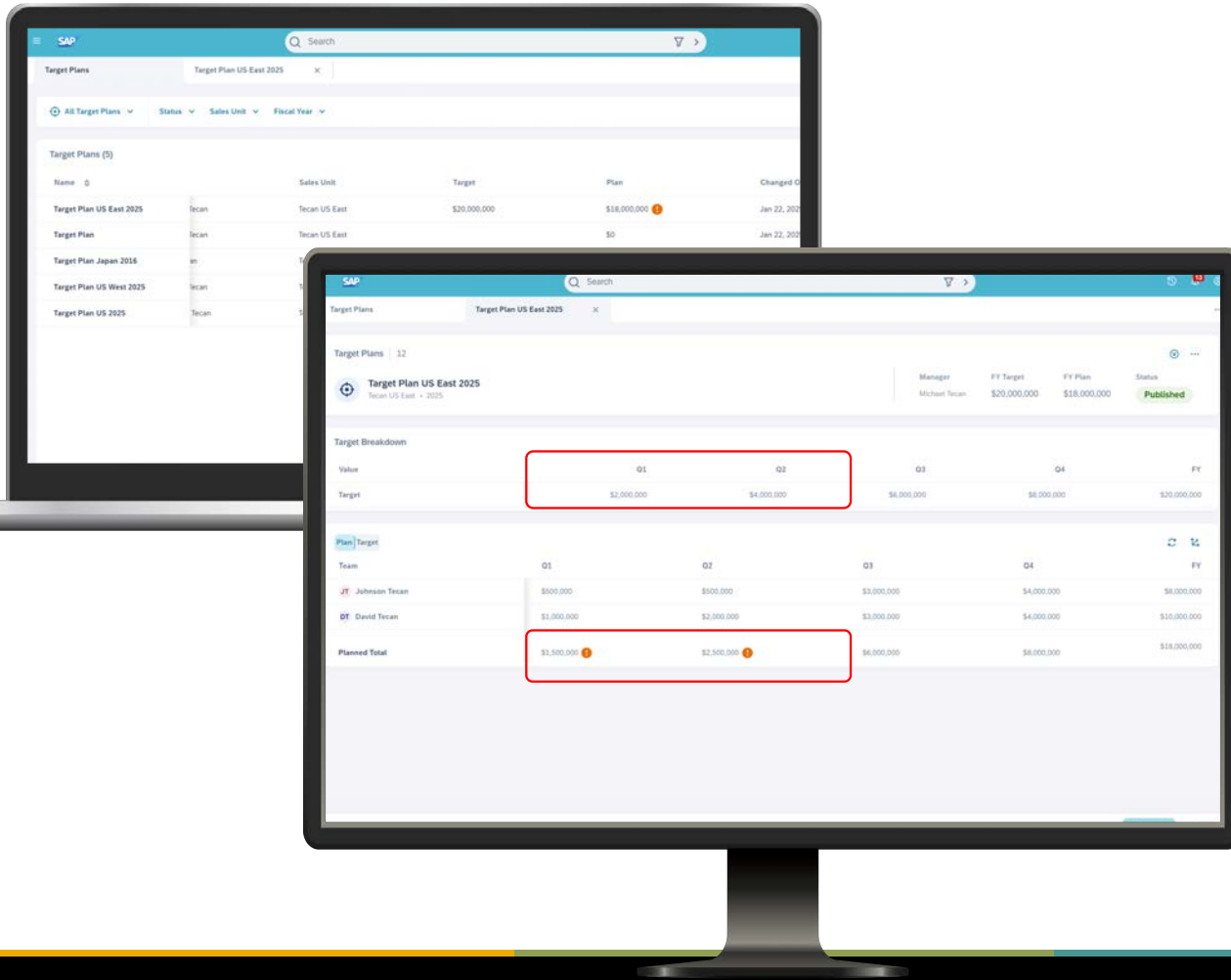
## Key Capabilities

- Sales managers can quickly allocate plan values among the team by directly entering total plan amount. The system automatically divides totals equally among subordinates listed in the allocation section.
- Provide a starting point for further adjustments if needed

## Business Benefits

- Simplify allocation process
- Save time and reduce errors in manual calculations and inputs

# Target Plans | Plan Value Validation



## Key Capabilities

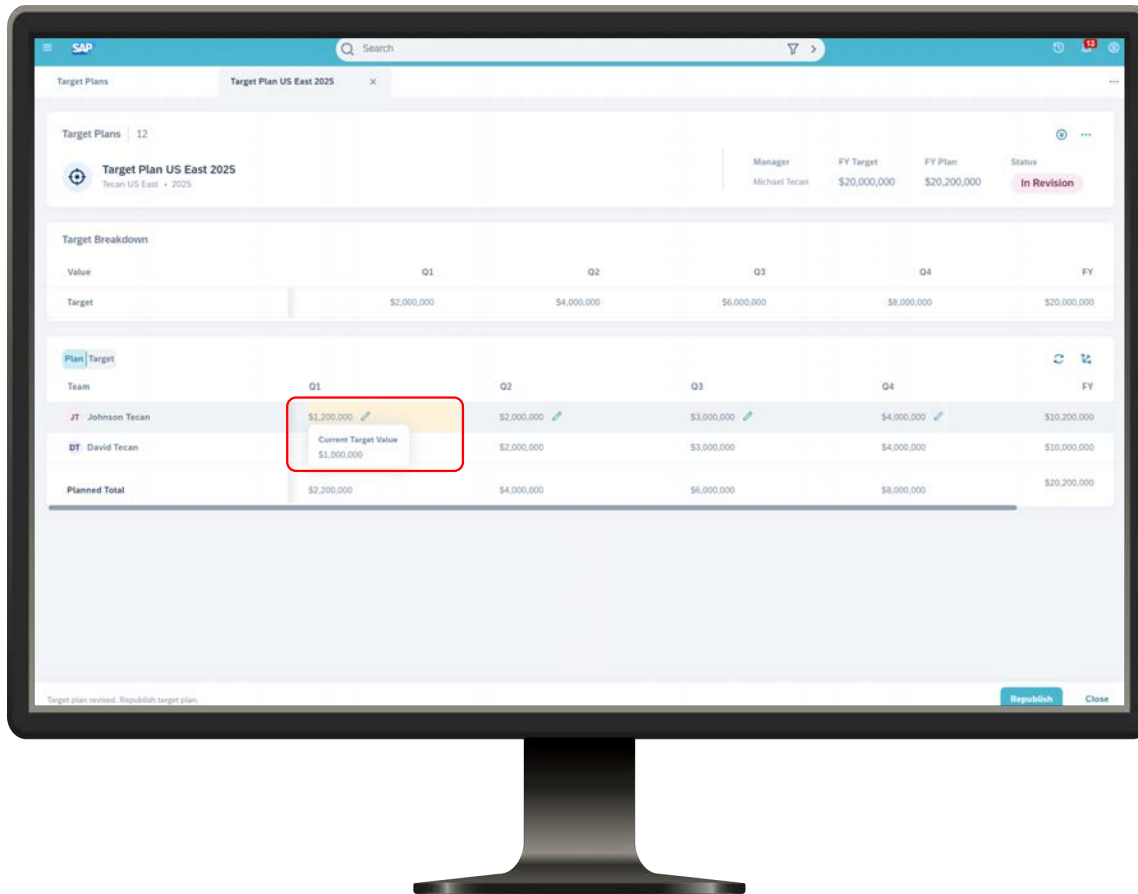
- An alert is displayed when the planned total for the team is lower than the given target.

## Business Benefits

- Prevent under-allocation or unintentional omissions during target planning processes



# Target Plans | Revise Target Plans



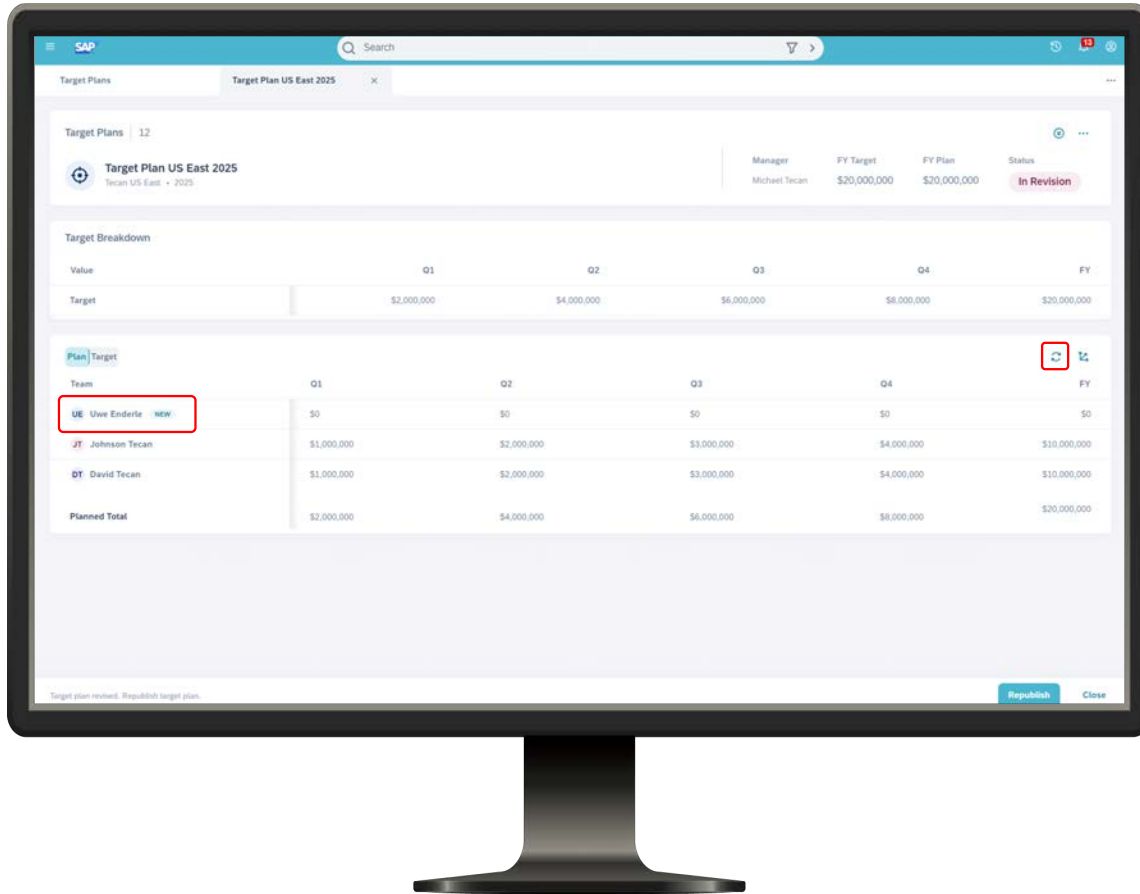
## Key Capabilities

- In a published target plan, users can modify plan values under the plan view, without affecting existing targets.
- The target plan automatically changes to 'In Revision' upon an edit.
- When a plan value gets modified, the field becomes highlighted, hover over which users can see and compare against the current target.
- Once changes are finalized, a republish is required to assign updated targets to individuals or teams in the sales unit.

## Business Benefits

- Allow for iterative adjustments to a target plan in response to market conditions, actuals, forecasts, etc.
- Easily spot where and how revisions are made in a target plan

# Target Plans | Sales Unit Sync



## Key Capabilities

- In case of team composition changes, sales managers can use 'Sales Unit Sync' action to get the latest team setup in org structure and adjust the target plan accordingly.

## Business Benefits

- Allow for quick adjustments to accommodate new hires, turnover, etc.
- Ensure targets are planned realistically based on the updated capacity, without overloading or under-allocating individual reps

# Target Plans | Target Plan Lifecycle

The screenshot shows the SAP Target Plans interface. A table lists five target plans with columns for Name, ID, Status, Owner, Fiscal Year, Manager, and Action. The Status column is highlighted with a red box, showing values: DRAFT, OBSOLETE, PUBLISHED, IN PREPARATION, and PUBLISHED.

Name	ID	Status	Owner	Fiscal Year	Manager	Action
Target Plan	2	DRAFT	Michael Tecan	2023	MT Michael Tecan	
Target Plan Japan 2016	6	OBSOLETE	Gregory Tecan	2016	KT Kate Tecan	
Target Plan US East 2025	12	PUBLISHED	Michael Tecan	2025	MT Michael Tecan	
Target Plan US West 2025	11	IN PREPARATION	Colleen Tecan	2025	CT Colleen Tecan	
Target Plan US 2025	7	PUBLISHED	Gregory Tecan	2025	GT Gregory Tecan	

## Key Capabilities

Target plans have following statuses:

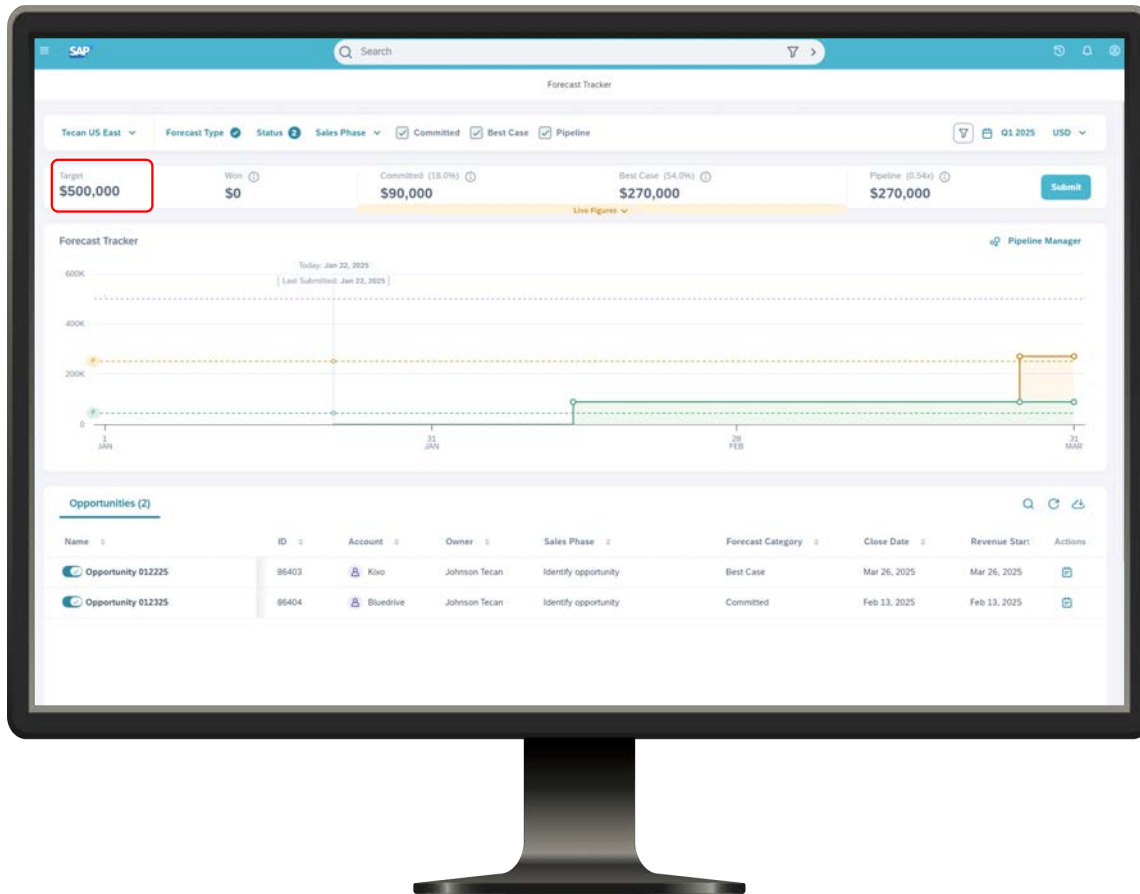
- **Draft** – The target plan is being created, with header maintained.
- **In Preparation** – The target plan is created and saved, yet not published.
- **Published** – The target plan is published.
- **In Revision** – When a change is made to a published target plan, the plan automatically becomes in revision.
- **Obsolete** – The target plan is no longer valid, and manually set to obsolete.

Note: Users can only delete target plans that are 'Draft', 'In Preparation' or 'Obsolete'.

## Business Benefits

- See at a glance the state of target plans, and quickly identify where input or action, such as publish or republish, is required

# Forecast Tracker | View Targets from Target Plans



## Key Capabilities

- Targets published from target plans can be displayed in forecast tracker.
- Sales managers see targets assigned to their responsible sales units, and sales reps see their own targets.

## Business Benefits

- Ensure sales team is aware of the benchmark they need to meet or exceed during forecasting
- Easily identify sales performance gaps, allowing corrective actions to be taken in a timely manner

## Getting Started

- In Forecast Tracker settings, admin users need to choose 'Target Plan' for setting target values.

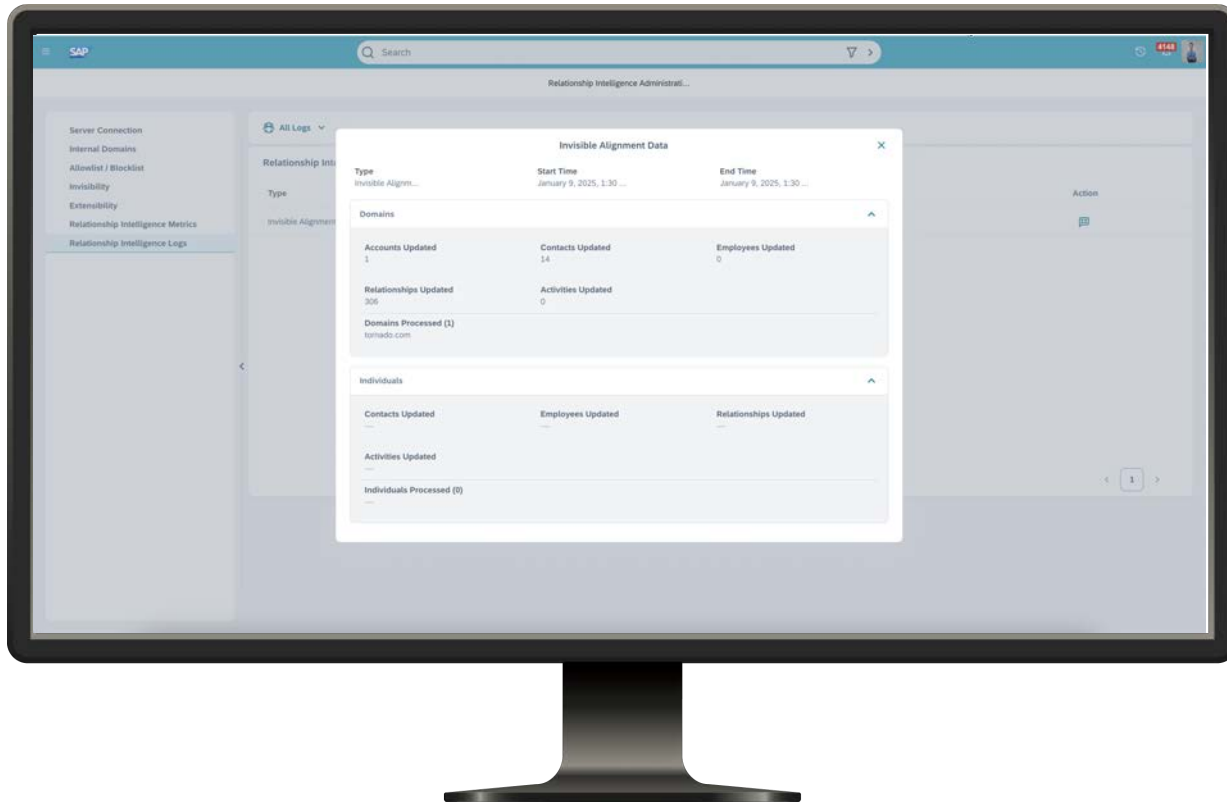


Please note that once you start consuming targets from target plans, users can no longer manually edit targets within Forecast Tracker.

# What's new in **Relationship Intelligence**?



# Relationship Intelligence | Logs



## Key Capabilities

- Activity cleanup – This automatically runs every 365 days to remove the outlook emails and meeting brought down from outlook to sales cloud by relationship intelligence
- Invisible Alignment – provides details on the number domains or individual email address that were removed in the last run
- Allowlist/Blocklist Alignment – provides details on the number domains or individual email address that were allowed or blocked in the last run.

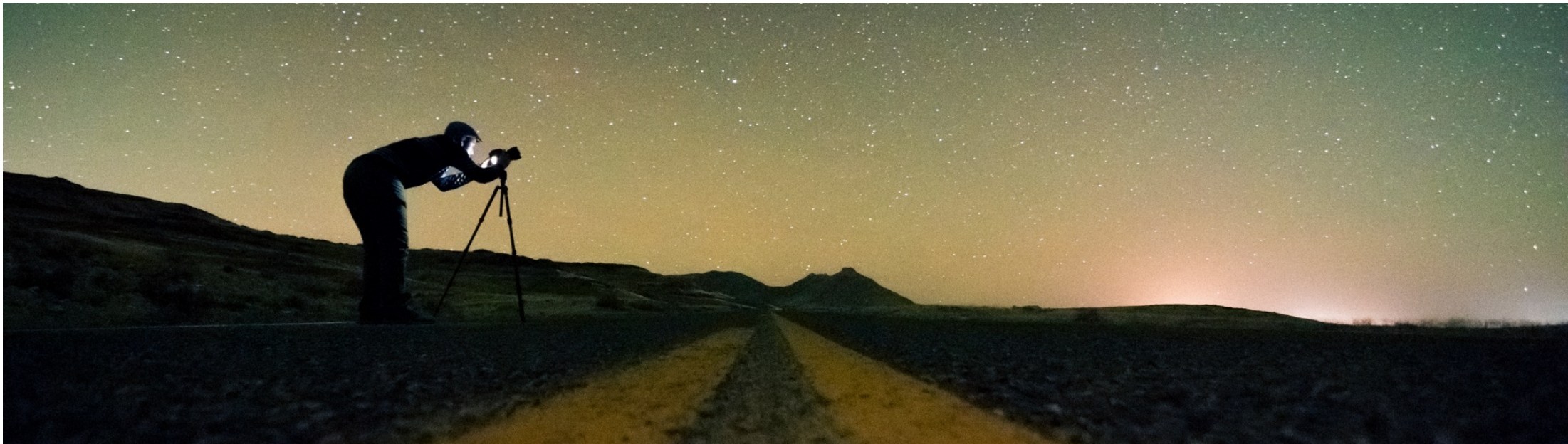
## Business Benefits

- Admins can now understand sync jobs in a better way and improve traceability

## Getting Started

- Will be available by default in Relationship Intelligence Administration -> Relationship Intelligence Logs

# What's new in **Dynamic Visit Planning** **Add-on?**



# SAP Sales Cloud Dynamic Visit Planning Add-on | Overview



The following capabilities are available with: SAP Sales and Service Core, dynamic visit planning add-on

## Key Innovations

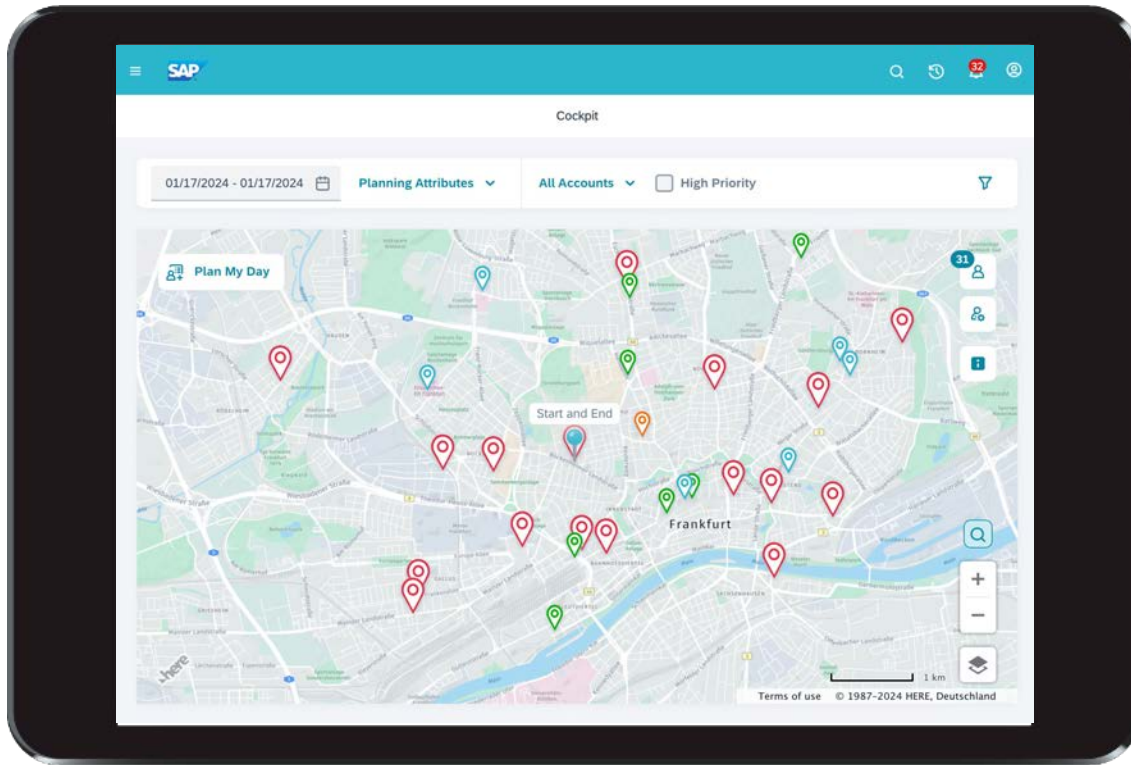
- Tablet optimization for Cockpit
- Support for Calendar Day view
- Support for Calendar Week view



*SAP Sales and Service Core, dynamic visit planning add-on is only available in the following Data Centers: Germany, Australia and USA*  
*SAP Sales and Service Core, dynamic visit planning add-on cannot be deployed within a Private edition system*  
*SAP Sales and Service Core, dynamic visit planning add-on does not support the EUDP access restriction*



# SAP Sales Cloud Dynamic Visit Planning Add-on | Tablet Optimization for Cockpit



## Key Capabilities

- Support for tablet for cockpit (along with existing support for browser) empowers organization to intelligently plan and accommodate visits for different types of accounts.

## Business Benefits

- Flexibility in accessing the cockpit from different devices (laptop and tablet)

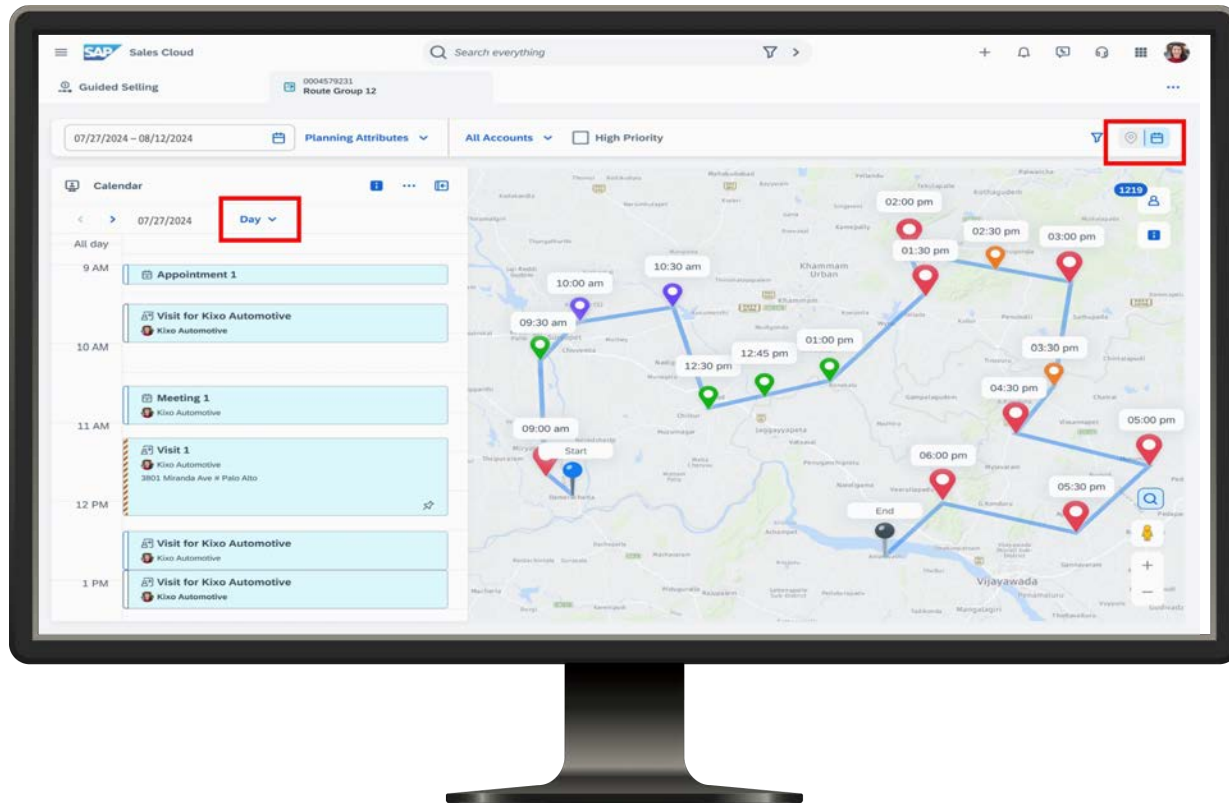


Please note that development is still in progress at the time of the release briefing and thus visuals and timelines might be subject to change\*

# Dynamic Visit Planning | Calendar Day View



<https://influence.sap.com/sap/ino/#/idea/308227>



## Key Capabilities

- The calendar in the cockpit will include appointments with location (along with existing support for visits) from Sales Cloud. Additionally, it should display planned visit list items from DVP alongside existing items from Sales Cloud.
- Users would have the capability to switch between calendar and map (route) views. Users should also have the option to switch between day view and week view in the calendar, and vice versa.
- If user is toggling the date and moving to next date/previous one, the corresponding day view in calendar would appear consisting of that day's visit list in maps.
- In the Calendar Day view, users will see a map on the right and a calendar view on the left for that specific day. The calendar will display only the current visit list and not secondary or other visit lists.
- Within Calendar Day and week view, users should be able to drag and drop visit list items in planned status within this view. Any planned visit list items that are moved would be treated as fixed visits for optimization logic purposes. Also, fixed visit icon would be shown against such planned items being moved by user. If the optimization process fails, an error message would be displayed. The time adjustment for the map pin will be done and displayed as the user drags and drops the pin on the calendar. Additionally, an entry should appear in the visit list for the day in the cockpit and in the visit list facet view. The current optimization logic will apply to both the map view and calendar view.

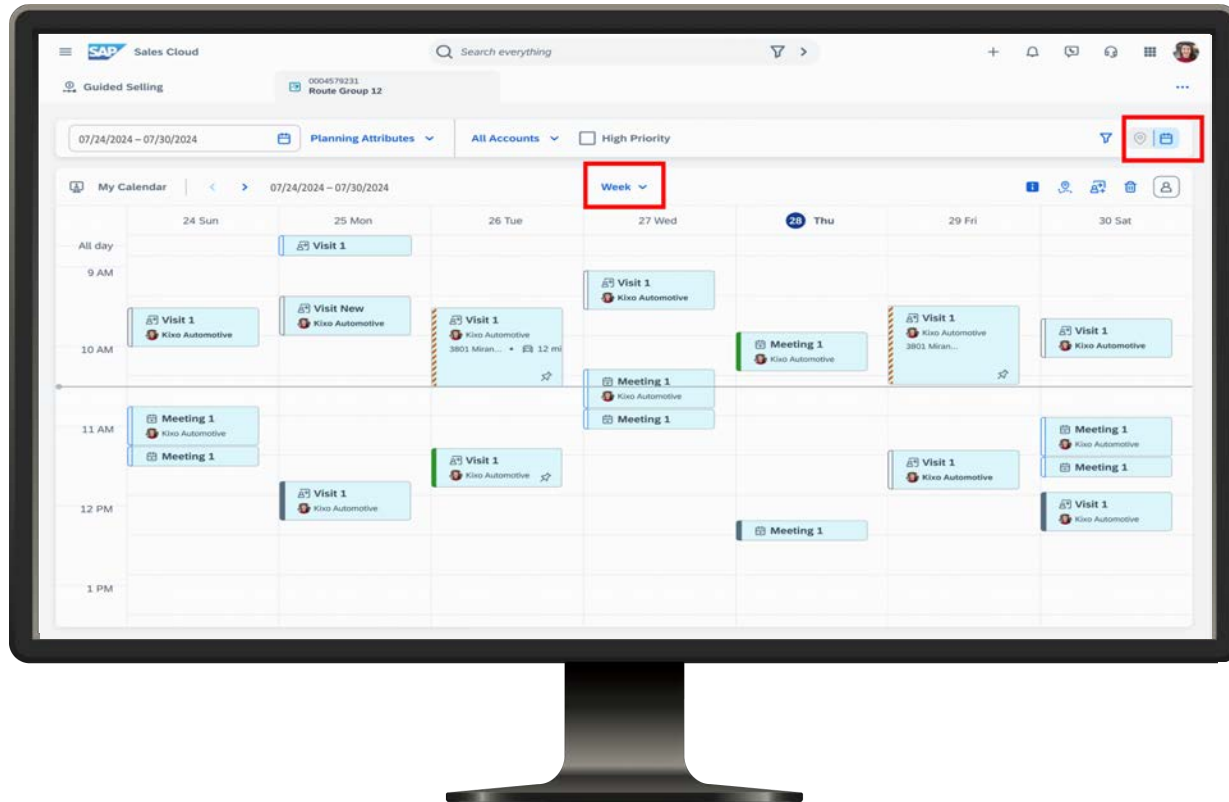


Please note that development is still in progress at the time of the release briefing and thus visuals and timelines might be subject to change\*

# Dynamic Visit Planning | Calendar Week View



<https://influence.sap.com/sap/ino/#/idea/308227>



## Key Capabilities

- Visits and appointments from Sales Cloud will not be permitted to be moved in DVP.
- Optimize button, delete button, and generate button for visit list items in planned status in DVP will be available in Calendar Day and week view. Optimize button, delete button, and generate button for visits and appointments coming from Sales Cloud will not be available in Calendar Day and week view (and Route View).
- Calendar Day View: In the day view, users will find a map view on the right and a calendar view on the left for that specific day. Users can drag and drop planned visit list items within the day, add accounts from map pins, or add them from the account list. Users would also have the option of “Plan my day” for creating system-based recommendations for that day. Plan my day should only be available if there are no prior planned visit list items existing on that day.
- Calendar Week View: In the week view, users will see the calendar view for the entire week. Users can drag and drop planned visit list items within the same day or different days throughout the week or add accounts from the account list. There will be no map view here.

## Business Benefits

- Enhanced visibility with pre-scheduled appointments from Sales Cloud while planning

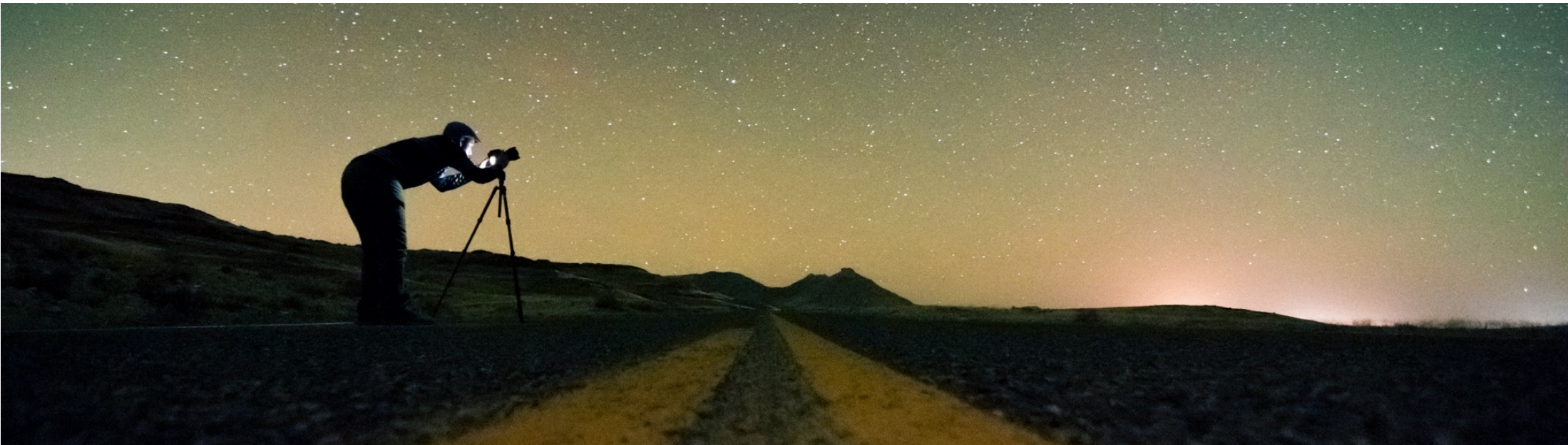
## Getting Started

- Navigate to Cockpit-> Toggle the switch from Map View to Calendar View



Please note that development is still in progress at the time of the release briefing and thus visuals and timelines might be subject to change\*

# SAP Sales and Service Core - Service

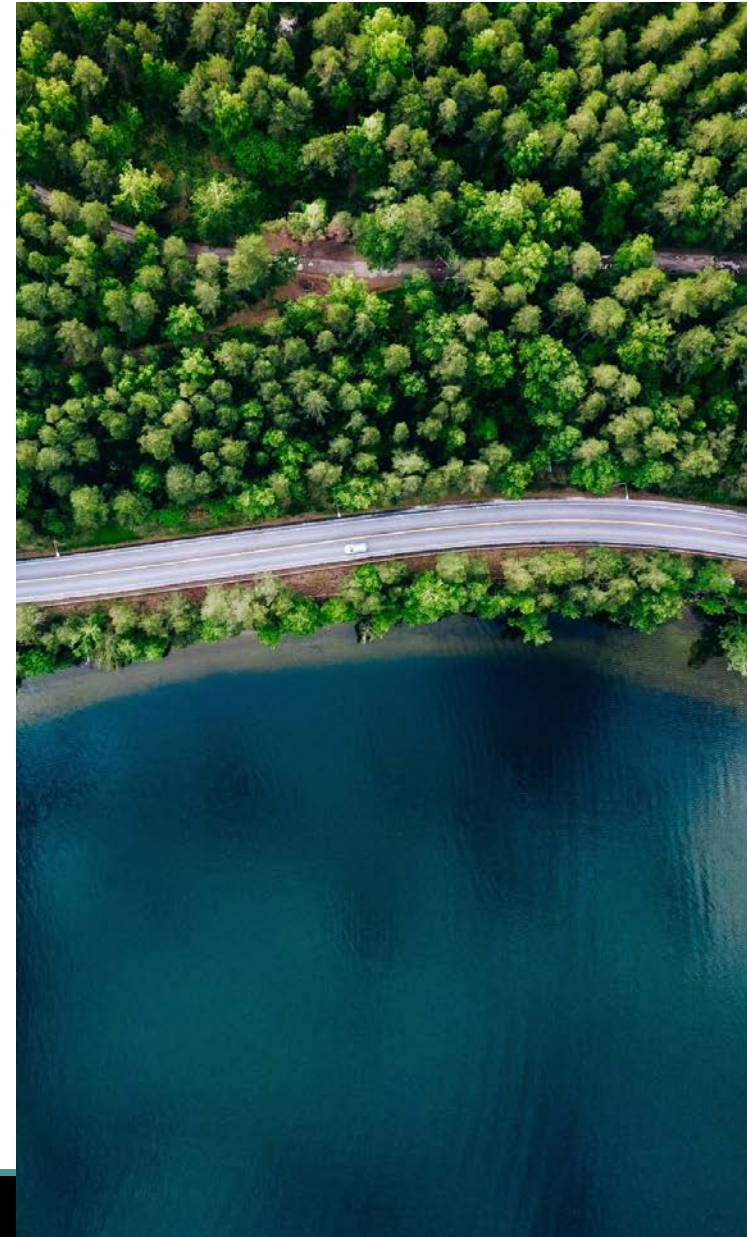


# SAP Sales and Service Core - Service

## SAP Service Cloud Core

- Ticket Management
- Email Management
- Service Objects

## SAP Agent Desktop Add-On



# SAP Service Cloud Core | Overview



## Key Innovations

### Ticket Management

- V1 to V2 Transition Tools – Ticket to Case



## Enhancements & Round-offs

### Ticket Management

- Visit is now created automatically when Appointment is created.

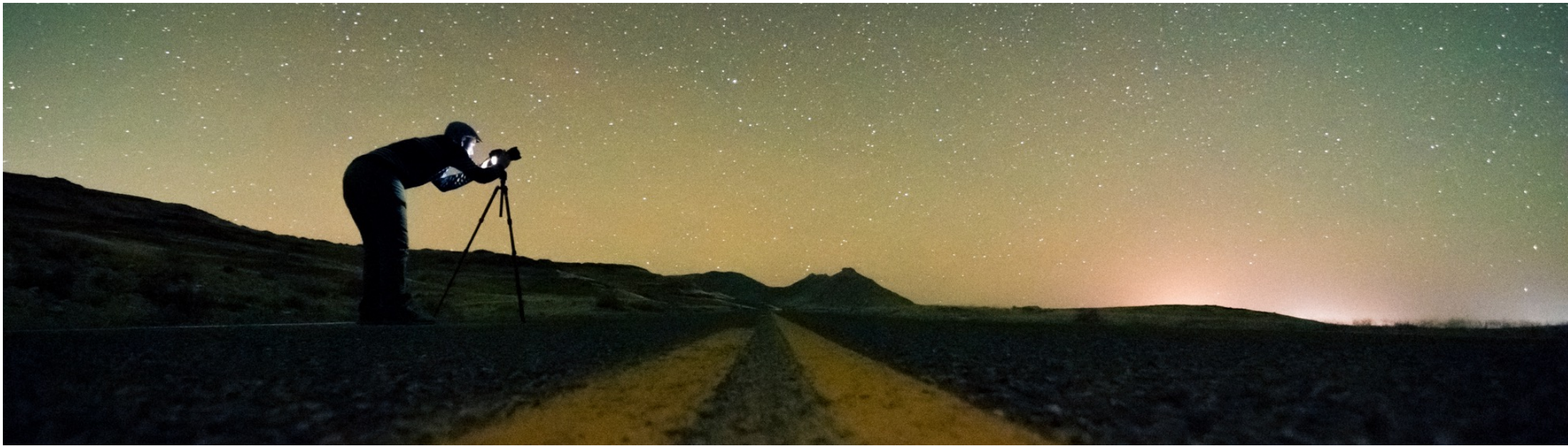
### Email Management

- Bcc channel information is stored for incoming emails.

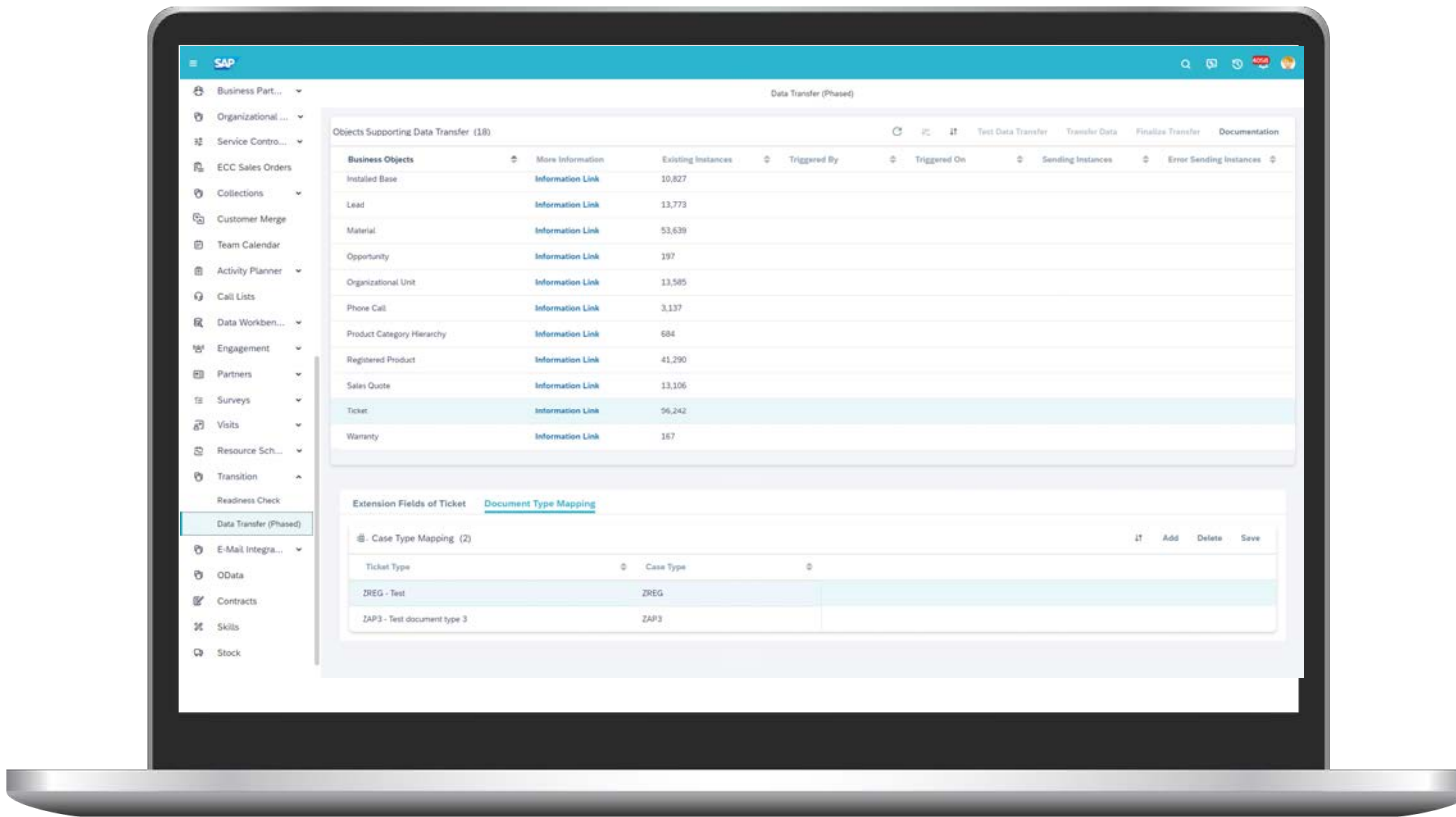
### Service Objects

- Maintenance Plan - PSM release of attributes in ServiceTicketInfo

# What's new in **Ticket Management?**



# V1 to V2 Transition Tools – Ticket to Case



## Key Capabilities

- Tickets will be migrated to SAP Service Cloud Version 2 as Case.
- Transition of Tickets (Service Request) from SAP Cloud for Customer to SAP Service Cloud Version 2 is now enhanced with additional attributes.
- Now supported:
  - Email interactions (prerequisite)
  - Threaded emails to Cases
  - Attachments
  - Tasks under Related Entities

## Business Benefits

- Tools to support customers planning to move from V1 (NGAP) to V2 (CNS).

## Getting Started

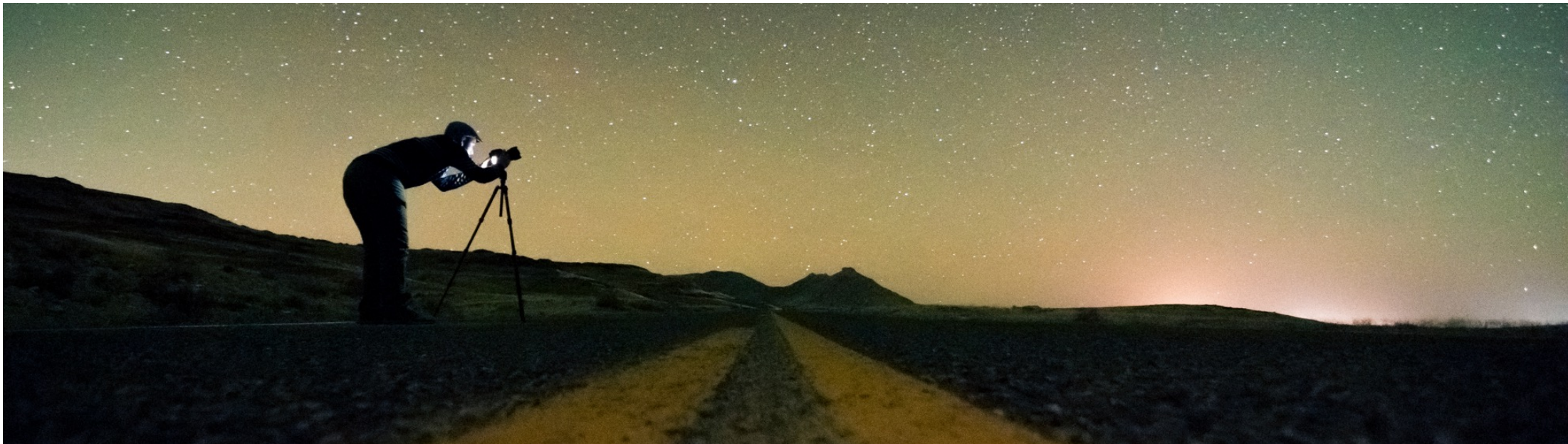
- Refer to Help documentation for detailed documentation



## Ticket Management - Roundoffs

- Visit is now created automatically when Appointment is created.

# What's new in **Email Management?**



# Email Management | Additional enhancements / round-offs



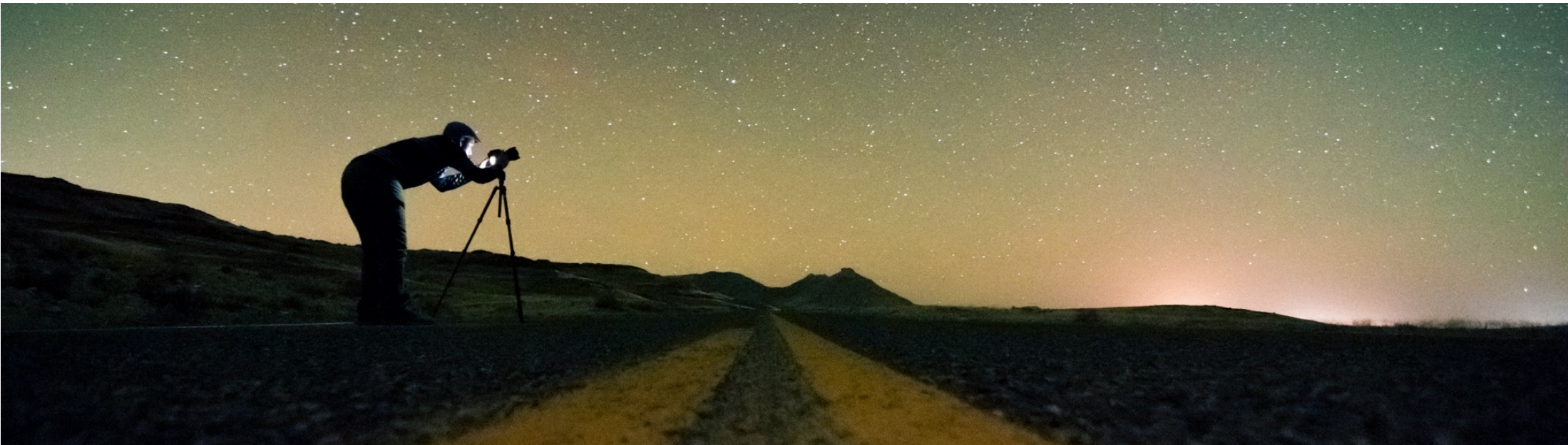
<https://influence.sap.com/sap/ino/#/idea/317903>

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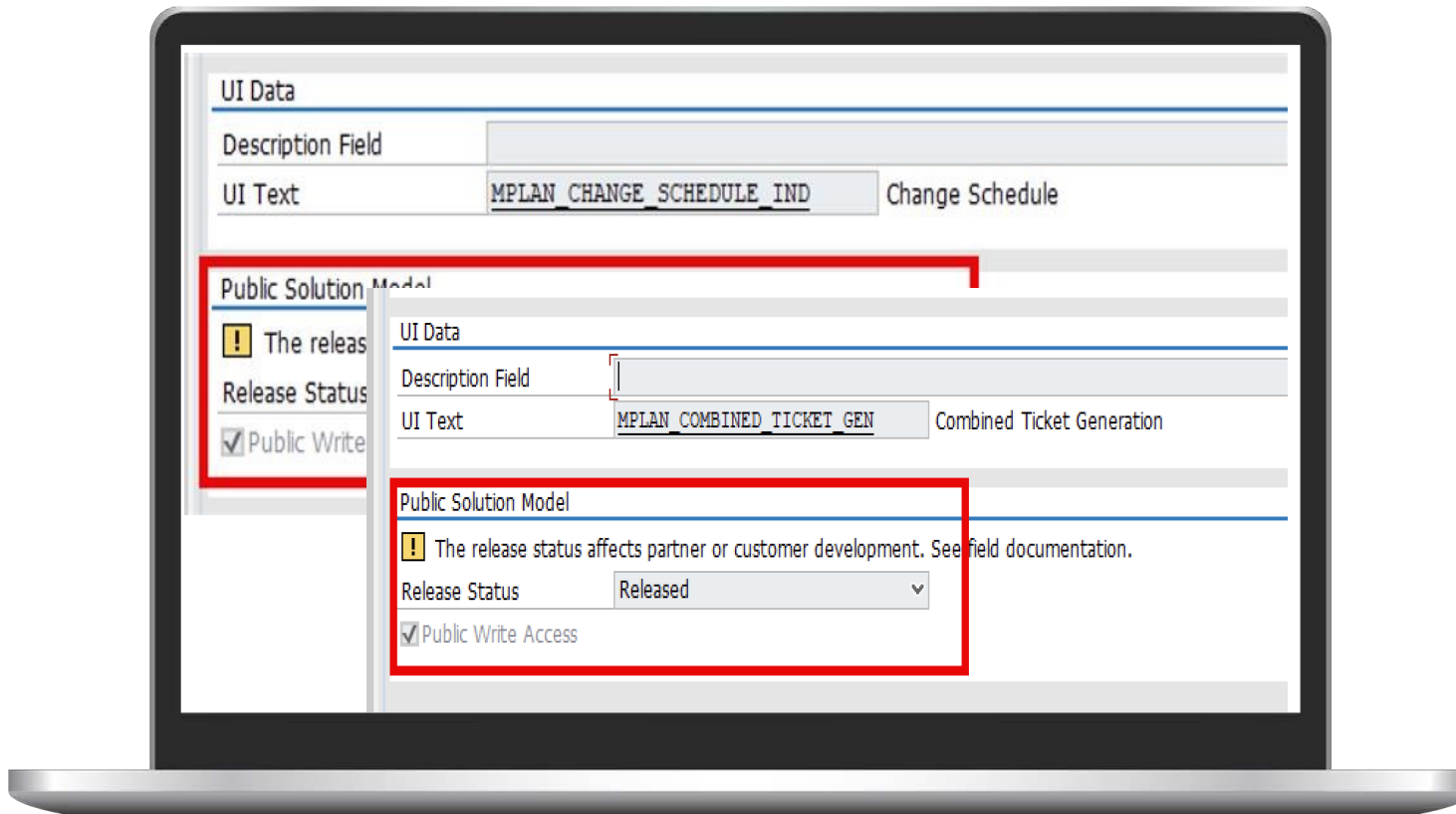
- **Bcc channel information stored for incoming emails**

Bcc channel information is now stored for incoming emails. Customers can fetch the Bcc channel details using custom logic for further processing.

# What's new in **Service Objects**?



## Maintenance Plan - PSM release of attributes in ServiceTicketInfo



### Key Capabilities

- PSM Release of attributes **ChangeScheduleIndicator** and **CombinedTicketGeneration**

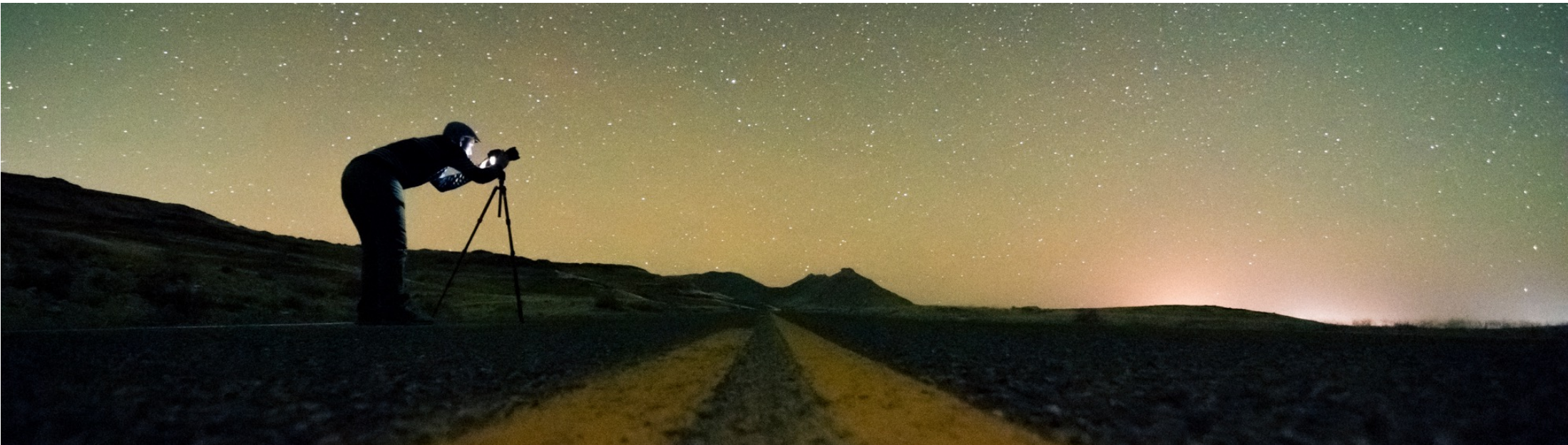
### Business Benefits

- To support a complete copy of the maintenance plan TEMPLATE information.

### Getting Started

- MDRS > BO > Maintenance Plan > Service Ticket Info

# What's new in **Agent Desktop Add-On?**



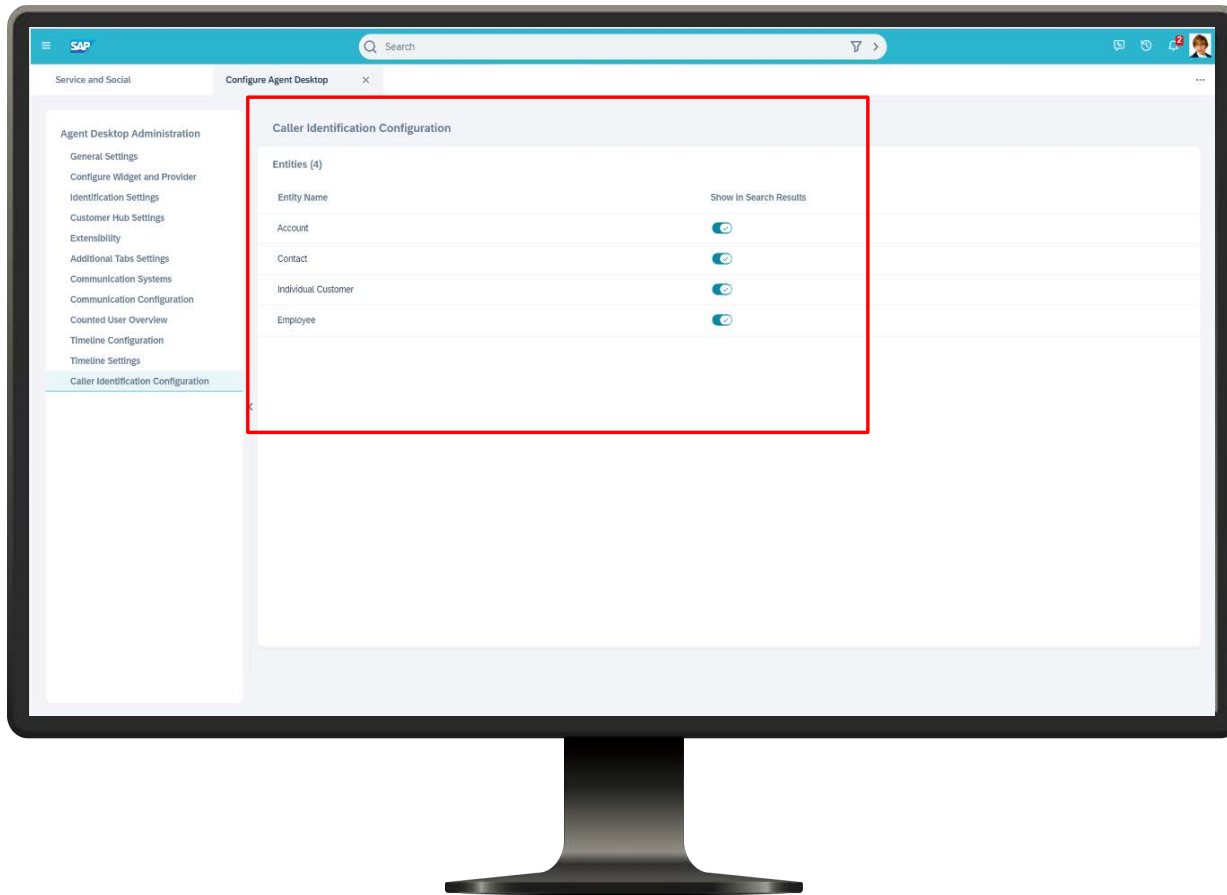
# Agent Desktop Add-On | Overview



## Key Innovations

- **Caller Identification Agent Desktop Search Customization**

# Agent Desktop Add-On | Caller Identification Agent Desktop Search Customization



## Key Capabilities

Admin can decide which Business Partner entities will show up in the Agent Desktop search when an Incoming Call/Message comes in.

## Business Benefits

- This will reduce the # of unnecessary calls made to the Search Service in the background, hence improving the performance of Agent Desktop Search.

- Agent will only see Business Partners relevant to their purpose as the rest will remain hidden from the UI.

## Getting Started

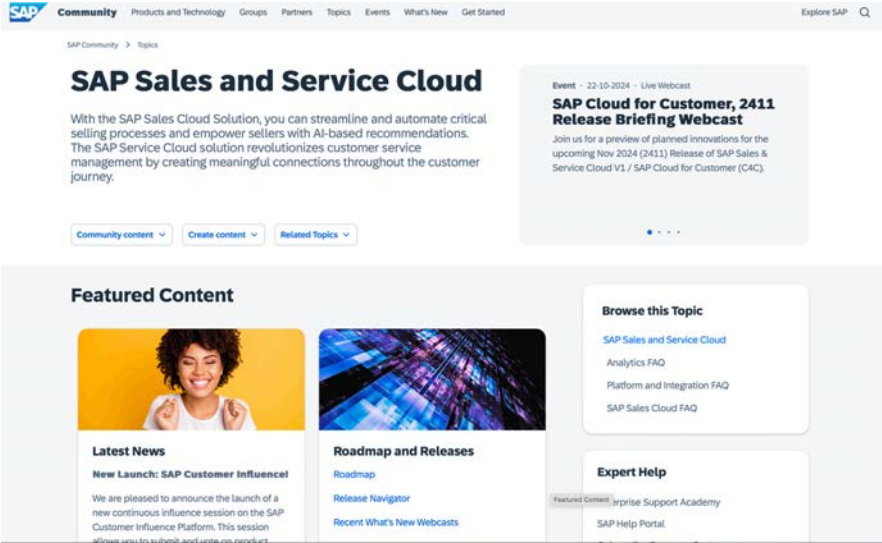
- Go to Administrator -> Service and Social -> Configure Agent Desktop -> Caller Identification Configuration.

- Enable or disable the Business Partner entities based on your business requirements.



# General Release Communication

As of 2502, we are planning to transition the release quarterly communication to a blog Post release communication posted on the SAP Community instead of a quarterly webcast.



# Support | SAP Cloud for Customer | Self-Help Resources

Before creating an incident your most important knowledge source is the **Federated Search**



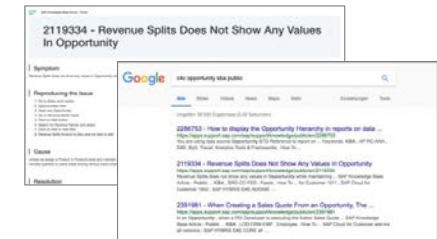
Directly available from your screen (click on „**Help Center**“ on the top right of your screen, then use search field in the top right)



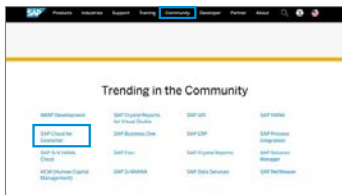
Searches all important databases at once



Product Documentation (User Assistance)



Support Knowledge Base Articles (labelled „Troubleshooting“) are available on search engines such as Google search



[SAP Community »](#)  
Blogs and Questions



Needs to be known by every key user + end user



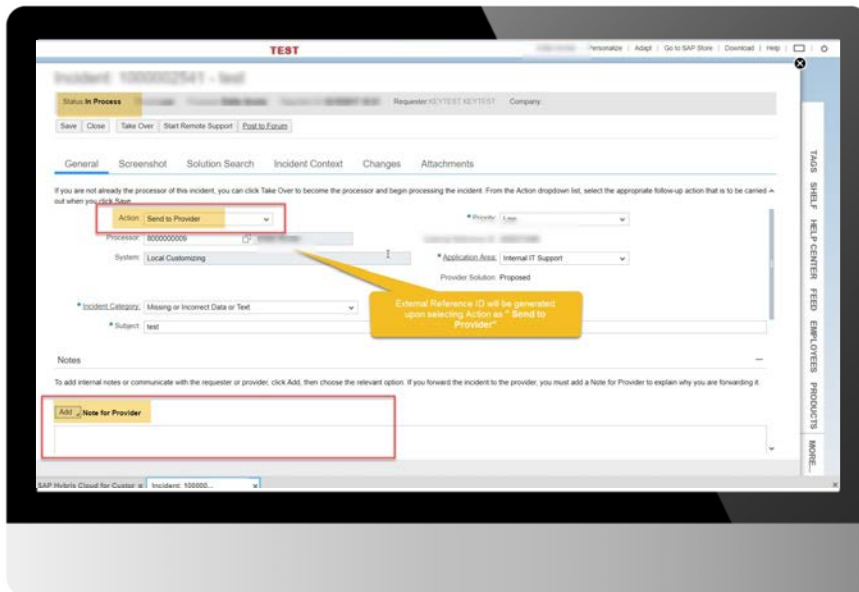
For end users:  
if you can't get your question answered by using the Federated Search, ask your Key Users.



For key users: ask your partner

# Support | SAP Cloud for Customer | Contacting Support

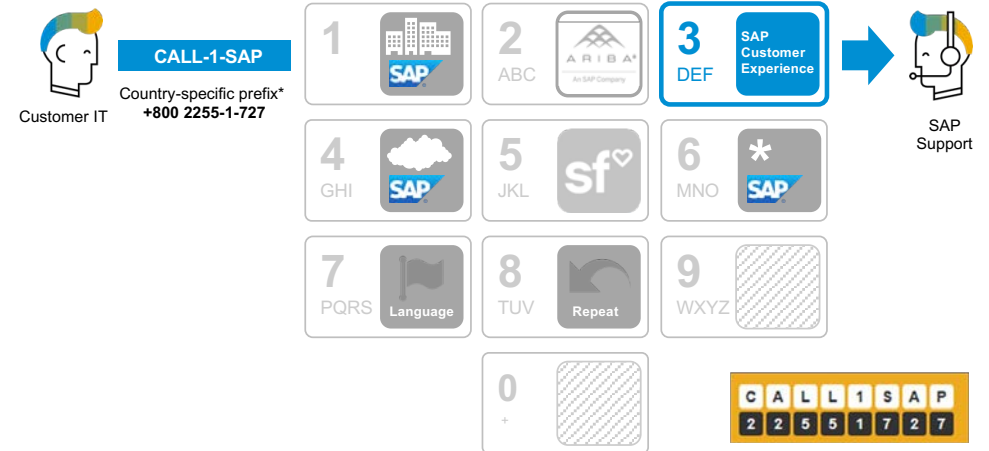
## Entry Channel 1: Built-In Support Application



**Truly built-in support application for complete incident management processes:**

- Federated Solution Search
- Create Incidents
- Monitor and process incidents

## Entry Channel 2: Global Support Interaction Center



**Call our global toll-free telephone number for contacting SAP support:**

- Accessible in most countries through landline phones and some mobile providers
- Access to service menu to select the specific product area you require

## SAP Customer Experience

Follow us



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