C4H410

SAP Sales Cloud

COURSE OUTLINE

Course Version: 2211
Course Duration:

SAP Copyrights, Trademarks and Disclaimers

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	*Example text*
Window title	*Example text*

Contents

Course Overview

TARGET AUDIENCE

This course is intended for the following audiences:

- Business Analyst

- Business Process Owner/Team Lead/Power User

- System Administrator

- Trainer

- User

Introduction to SAP Sales Cloud

Lesson 1: Outlining the Functional Capabilities of SAP Sales Cloud

Lesson Objectives

After completing this lesson, you will be able to:

- Navigate and Search in SAP Sales Cloud

UNIT 2 Lead Management

Lesson 1: Outlining the Functional Capabilities of Lead Management

Lesson Objectives

After completing this lesson, you will be able to:

- Create a lead in Lead Management

- Create leads and maintain account and contact details

- Maintain lead qualifications

- Convert leads to opportunities

- Set up lead aging notifications

Lesson 1: Outlining the Functional Capabilities of Opportunity Management

Lesson Objectives

After completing this lesson, you will be able to:

- Configure and use Opportunity Management

- Create Opportunity and Maintain Qualification Parameters

- Understand Products and Revenue Planning

- Understand Sales Methodology and Visits

- Understand Influencer Map and Buying Center Concepts

- Create an Opportunity Factsheet

- Create or Trigger Follow Up Sales Quotes and Sales Orders

- Execute Opportunity Specific Reports and Dashboards

UNIT 4 Quotation Management

Lesson 1: Outlining the Functional Capabilities of Quotation Management

Lesson Objectives

After completing this lesson, you will be able to:

- Create and Manage Quotes in Quotation Management

- Create Quotation with or without Referring to Opportunity

- Recommended Products and Trigger External Pricing

- Check Free Goods Determination, Credit Check and ATP

- Quote Assessment via Surveys

- Check Quote form Preview

Sales Contracts

Lesson 1: Outlining the Functional Capabilities of Sales Contracts in SAP Sales Cloud

Lesson Objectives

After completing this lesson, you will be able to:

- Create a Sales Contract

- Reference a Sales Contract in a sales document

- Learn about follow-up options for Sales Contracts

UNIT 6 Order Management

Lesson 1: Outlining the Functional Capabilities of Order Management

Lesson Objectives
After completing this lesson, you will be able to:

- Outline the Functional Capabilities of Order Management

- Create Sales Order from SAP Sales Cloud

- Understand Recommended Products and Trigger External Pricing

- Check Free Goods Determination, Credit Check and ATP

- Check Sales Order preview

Activity Management

Lesson 1: Outlining the Functional Capabilities of Activity Management

Lesson Objectives
After completing this lesson, you will be able to:

- Create activity lists in Activity Management

- Get familiar with Calendar View

- Understand the usage of Activity Lists

Visit Planning and Execution

Lesson 1: Outlining the Functional Capabilities of Visit Management

Lesson Objectives
After completing this lesson, you will be able to:

- Set up a visit plan in Activity Management

- Understand visit planning and the execution process

- Set up an activity plan for automatic task and survey proposal in Visits

- Schedule visits for customers

- Execute the visit

- Create follow up transactions

UNIT 9 Sales Planning and Forecasting

Lesson 1: Outlining the Functional Capabilities of Sales Planning and Forecasting

Lesson Objectives

After completing this lesson, you will be able to:

- Create sales targets and forecasts

- Prepare multi-dimension sales plan and forecast

- User Excel to make sales plans in SAP Sales Cloud

UNIT 10 | Pricing

Lesson 1: Describing the Pricing Topic in SAP Sales Cloud

Lesson Objectives

After completing this lesson, you will be able to:

- Create a pricing list in Pricing Management

- Understand the capabilities and options related to how pricing is used for sales quotes and sales orders while online

- Understand the key features and functions of pricing in SAP Sales Cloud

- Understand the options and flexibility in setting up pricing through business configuration

- Understand the difference between internal and external pricing

SAP Sales Cloud Add-Ons

Lesson 1: Describing Add-On Features in SAP Sales Cloud

Lesson Objectives

After completing this lesson, you will be able to:

- Describe Add-On Features in SAP Sales Cloud