

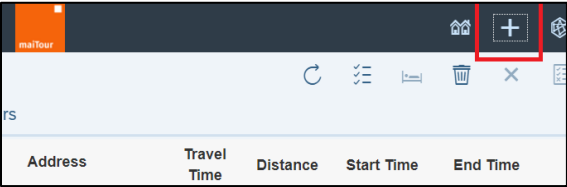
maiTour Account Search in SAP Sales Cloud Integration

The maiTour search feature allows users to find their assigned accounts directly in maiTour.

How the account assignment is done, and which fields are going to be used in maiTour is determined by the SAP Sales Cloud maiTour Report.

The “maiTour” report is part of the SAP Sales Cloud functionalities and not maiTour. The main purpose of the report is to extract the Accounts and the fields to be used from C4C and display it to the user in maiTour.

maiTour Search Feature



Open maiTour and click on the '+' button to reveal the search dialogue.

The list of properties for the maiTour search feature such as *Role* or *Date of the Next Visit* are fields directly provided by the SAP Sales Cloud Report.

The 'Add Customers' dialog box contains the following fields:

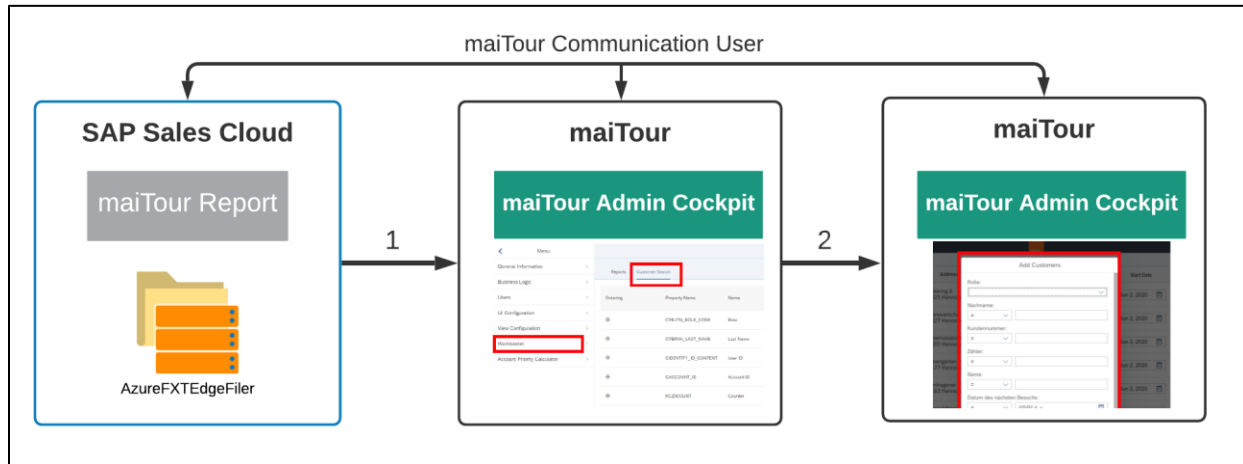
- Role: [dropdown menu]
- Last Name: [=] [dropdown arrow] [text input field]
- Account ID: [=] [dropdown arrow] [text input field]
- Counter: [=] [dropdown arrow] [text input field]
- Name: [=] [dropdown arrow] [text input field]
- Date of Next Visit: [=] [dropdown arrow] [text input field with placeholder 'MMM d, y' and a calendar icon]

Buttons: Cancel, Search

maiTour Search Implementation Overview

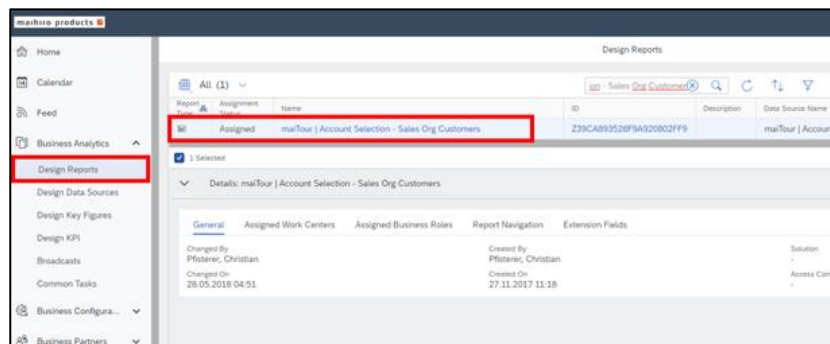
All search criteria that you see in the search dialogue are automatically generated by the SAP Sales Cloud maiTour Report and displayed in the maiTour Admin Cockpit.

In the maiTour Admin Cockpit you can further customize the fields for example by deciding which fields should be visible in maiTour.



SAP Sales Cloud - maiTour Report

It's important to note that the assignment of the accounts is different for every tenant. Some assignments are done through Territory Management or by direct assignment of the users to the accounts. During the initial deployment of maiTour on a tenant the report has been configured according to specific customer requirements. To identify a maiTour report simply search for "maiTour".



FAQ

Question: Which Report is currently in use by maiTour?

Answer: The maiTour Report in use is displayed in the maiTour Admin Cockpit in the Workbasket under “Account selection report”:

The screenshot shows the 'Workbasket' interface with a left-hand menu and a main configuration area. The 'Account selection report' dropdown is highlighted with a red box. The configuration area includes fields for 'Key field for query', 'Key field in result', 'Feld für nächsten geplanten Besuch', 'Feld für spätesten empfohlenen Besuch', 'Sales Rep selection report', and another 'Key field for query' and 'Key field in result'.

Field	Value
Account selection report:	maiTour Account Selection - Responsible Employee by Us...
Key field for query:	CIDENTITY_ID_CONTENT
Key field in result:	CACCOUNT_ID
Feld für nächsten geplanten Besuch:	CNEXT_VISITING_DATE
Feld für spätesten empfohlenen Besuch:	CLATEST_RECOM_VISITING_DATE
Sales Rep selection report:	
Key field for query:	
Key field in result:	

Question: How can I access the maiTour Admin Cockpit?

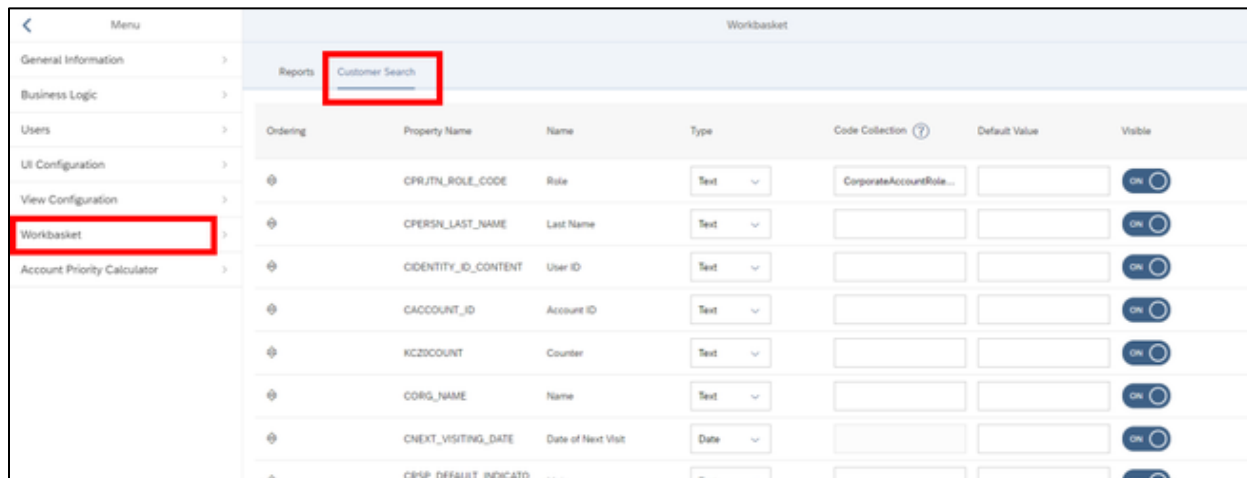
Answer: The maiTour Admin Cockpit can be accessed through a unique URL found in the SCP subaccount. This will be provided by maihiro products.

Useful tips on this topic:

- https://www.tutorialspoint.com/sap_c4c/sap_c4c_creating_a_custom_report.htm
- <https://help.sap.com/viewer/cea15f900ca04c4faa35d3044577fe27/1802/en-US/1879e80e763d1014ae51faf227aba727.html>
- <https://blogs.sap.com/2018/01/22/best-practices-for-sap-cloud-for-customer-analytics-reports-performance/>

maiTour Admin Cockpit - Customer Search

The fields for the maiTour search are editable through the SAP Sales Cloud report and the maiTour Admin Cockpit:



Ordering	Property Name	Name	Type	Code Collection	Default Value	Visible
	CPRJTN_ROLE_CODE	Role	Text	CorporateAccountRole...		ON
	CPERSN_LAST_NAME	Last Name	Text			ON
	CIDENTITY_ID_CONTENT	User ID	Text			ON
	CACCOUNT_ID	Account ID	Text			ON
	KCZCOUN	Counter	Text			ON
	CORG_NAME	Name	Text			ON
	CNEXT_VISITING_DATE	Date of Next Visit	Date			ON
	CRSP_DEFAULT_INDICATO	...	Text			ON

- The fields displayed in the maiTour Admin Cockpit are picked up automatically from the maiTour report in the SAP Sales Cloud.
- After performing changes to the report in SAP Sales Cloud refresh the Admin Cockpit for maiTour to resync the data.

Ordering

Using drag and drop the fields can be rearranged with ease. Don't forget to click save before leaving the page for the changes to take effect.

Property Name

The technical name of the field generated by the report. Can't be changed in the Admin Cockpit

Name

The name of the field generated by the report. Can't be changed in the Admin Cockpit.

Type

Fields use a specific type and it's very important to use the right type otherwise SAP Sales Cloud will not accept it and an error message will be displayed in maiTour.

Best practice: Select the same type for the fields as you see them in SAP Sales Cloud:

- If a field in SAP Sales Cloud is displayed as date, then select Date as a type from the dropdown list
- If a field in SAP Sales is defined as a number, then selected Number as a type from the list

Code Collection

When used in combination with fields formatted as “Text” then it converts them automatically into dropdown lists. Relevant only for fields of the type “Text”.

Visible

This function allows you to choose which fields will be displayed in maiTour UI and which not. By default, all fields from the report are displayed in the Admin Cockpit and therefore are visible in maiTour.

FAQ

Question: I added a new field in the report and now maiTour displays an error message. What can I do?

Answer: Most likely SAP does require this field to have a specific type. The solution is to change the type of the field.