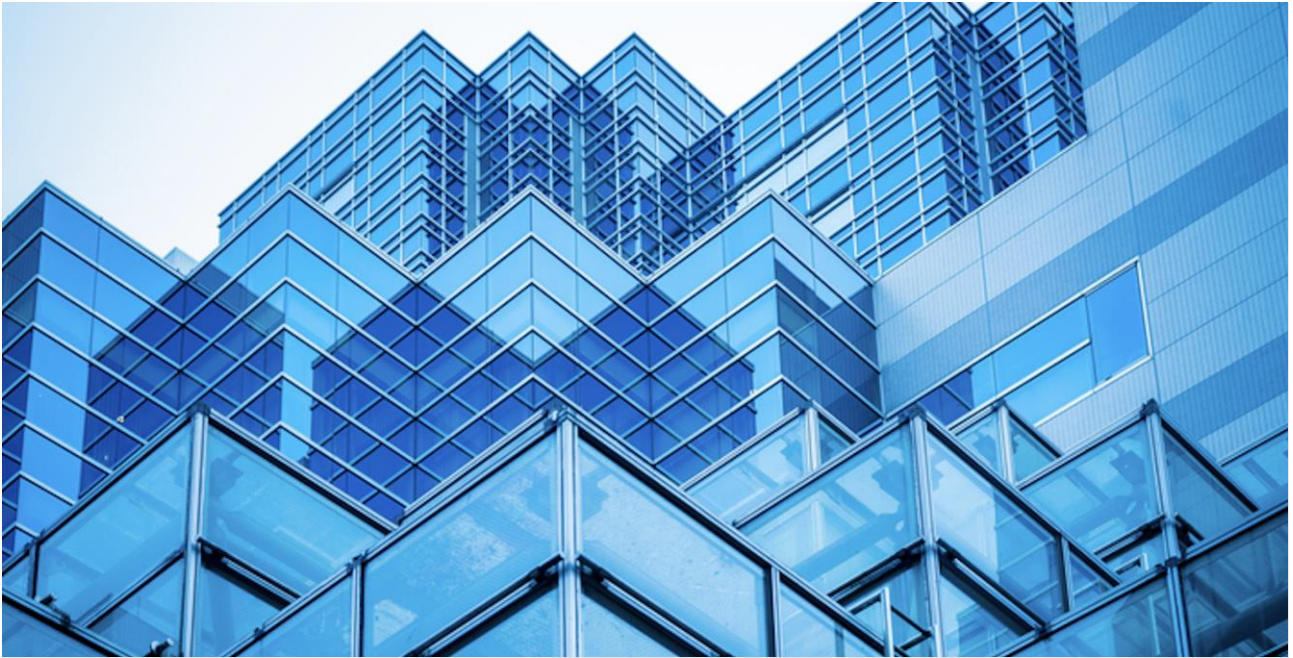




PUBLIC

SAP Build Process Automation

Round Robin Lead Assignment And Creation In SAP Sales Cloud V2 Configuration & User Guide

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Change Log

Version	Date	Description
1.0.0	May 16 th , 2024	Document created

This document contains 3 sections. Each section covers different information about this template content package.

1. **Overview:** In this section, you will get quick overview of the use case, what are high-level components used and how the template works in nutshell. Prerequisite section provides information of different services of SAP BTP that are required to use this template.
2. **Configuration Guide:** It contain sections which will guide you to setup your (a) SAP BTP Account with destination, cloud connector, user roles etc, (b) Integration Content via SAP Integration Suite, (c) SAPUI5 application via SAP Business Application Studio and (c) Import and configure the template using SAP Build Process Automation design studio and (d) SAP Work Zone to access the MyInbox or Task Center and other applications.
3. **User Guide:** This section provides details about different artefacts that are used in this template like process definition, decision diagram, action project details, forms, email notifications etc. to better understand how different capabilities are used in this template.

Notes:

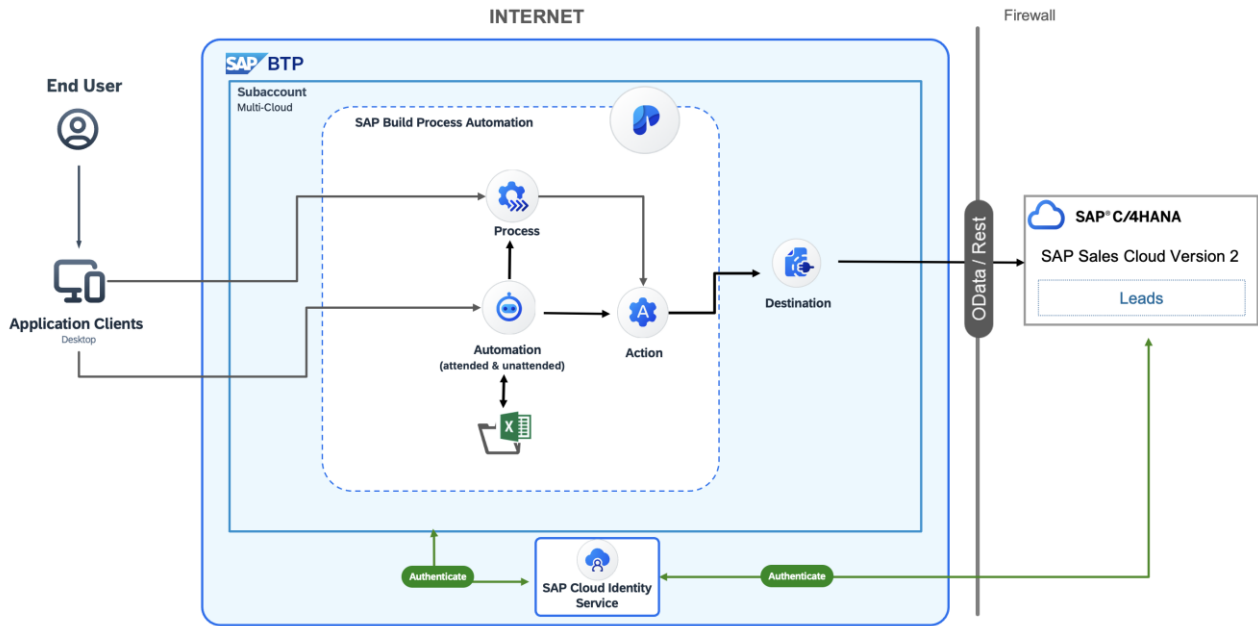
- This documentation is not a detailed guide to setup SAP BTP services. It assumes that IT admin who is setting the content is skilled with SAP BTP environment. Configuration section must be mandatorily followed to import and configure the template.
- This template content is to accelerate your solution development. You can modify this template according to your requirements to achieve the desired business goal. To use this template content, you need to have basic knowledge and understanding of SAP Build Process Automation and its capabilities.

Overview

The " **Round Robin Lead Assignment And Creation In SAP Sales Cloud V2** " template streamlines and automates the process of creating a lead via a form and assigning existing, 'open' and 'accepted' leads without owners to the respective sales representative belonging to a sales organization.

The process fetches existing leads without owners which are in an 'Open' and 'Accepted' state from the SAP Sales Cloud V2 system. It then assigns these leads in a round robin fashion to the sales employees in the specified sales organization based on multiple factors like threshold, existing leads and last lead assignment date.

Solution Diagram:



The following steps are included as a part of **Round Robin Lead Assignment And Creation In SAP Sales Cloud V2** template and provides a brief overview about the process flow & features:

- This package provides a process which contains a form to create leads in the SAP Sales Cloud V2 system.
- This package provides multiple automations:
 - A main automation to fetch sales employees' details belonging to a sales organization unit
 - An automation to fetch leads that are in an 'Open' and 'Accepted' status and do not have lead owners assigned to them – These are the leads which are qualified for round robin assignment. It then fetches existing leads assigned to the sales employees to determine their current load and organize them for round robin lead assignment.
 - An automation to perform the round robin lead assignment depending on the sales employees' current load and defined threshold.
 - Automations to build the excel file report and send it to the defined users. By default, a mail is sent to the sales organization manager.

NOTES:

1: The process can be triggered via **attended** and **unattended triggers**.

Prerequisites

The following SAP Business Technology Platform services are required to consume the content package:

- SAP Build Process Automation to orchestrate the process.
- SAP Cloud Identity Services - Identity Authentication
- SAP Sales Cloud Version 2
- SAP Business Technology Platform, Cloud Foundry runtime
- SAP Work Zone, standard or advanced edition for embedding the lead creation form where necessary.

Other Prerequisites

For this template to run successfully the following other prerequisites are needed:

- SAP Desktop Agent 3.26.54 or higher
- Outlook mailbox configured on the system where the automations will run to send mails with attachments.
- Microsoft Excel to build the log report

Prerequisites in SAP Sales Cloud Version 2

- A sales organization unit containing sales employees and a manager
- Leads qualified for round robin assignment should not have a lead owner assigned to it already and should be in an 'Open' or 'Accepted' status.
- Rules/customizations which interfere with lead owner assignment may have to be disabled / modified.
- The business user used in the destination mentioned below should have appropriate roles/authorizations in the SAP Sales Cloud V2 system to view, create and update leads.

Configuration Guide

The **Round Robin Lead Assignment And Creation In SAP Sales Cloud V2** template requires SAP Build Process Automation subscription or CPEA contract. Follow the [setup and configuration section](#).

Setup SAP Business Technology Platform Cockpit

Destination Configuration

Destinations are used in the template to connect to different system & services. This sub-section guides you to create various destinations in the SAP BTP Cockpit.

SAP Sales Cloud Version 2

To access the SAP Sales Cloud V2 for read and update operations, an HTTP destination is required in the SAP BTP account where the SAP Build Process Automation is subscribed.

- Create a destination with Basic Authentication.
 - A common destination is used to connect to various APIs that are defined in the 'Actions project'.

Destination with Basic Authentication

Name	<name> E.g.: sap_salescloudv2
Type	HTTP
Proxy Type	Internet
Authentication	Basic Authentication
URL	<C/4HANA – endpoint>

ProcessAutomationParticipant	To execute (like accessing MyInbox, running the automations, etc.) this content package, you need to have this role assigned to the respective user.
ProcessAutomationAdmin	To perform process admin activities like accessing monitoring application etc., you need to have this role assigned to the respective user.
TaskCenterAdmin	Permission to execute calls to the Connector Status API and monitor configured destinations and running background jobs.

For more information about SAP Build Process Automation roles, see [Authorizations](#)

Setup SAP Build Process Automation Content

Import Content

This template can be downloaded from the Store:

- 1) Navigate to the **Store** in your SAP Build Process Automation application.
- 2) Select the Project Type filter as **'Process'** -> **'Business Process'**.
- 3) In the Search bar type **"Round Robin Lead Assignment And Creation In SAP Sales Cloud V2"**
- 4) Select the "Create from Template" button to add the template into your lobby.
- 5) After successfully adding the template, navigate back to the lobby to find the **"Round Robin Lead Assignment And Creation In SAP Sales Cloud V2"** project available for use.

Configuration & Modification

Once you have added the content to your lobby, you will find the project in your project list. Adapt the content template based on your requirements, and then release and deploy from the Lobby.

Configure Process

This package contains the main process "Lead Creation Process", and it does not need to be explicitly configured. It can be directly utilized after successful deployment.

Configure Forms (Optional)

This template contains a form 'Customer Lead Request Form' for creating a lead in the SAP Sales Cloud V2 system.

To edit a form:

- Double click the form to open the Form Editor
- You can configure existing fields or add new layout or input fields to the form by simply dragging-and-dropping them from the side menu.

Following snapshot shows the form with the necessary inputs to create a lead:

Customer Lead Request Form

Lead Title * ⓘ

Enter Text T

Company Information

Company Name * ⓘ

Enter Text T

Company Web Site

Enter Text T

Company Email

Enter Text T

Country

Select an Option v

State *

Enter Text T

Additional details can be added to the form by dragging needed values.

Configure Email

Email notifications are sent to requestor and approver at different places during process and task execution. All the email artefacts in the process have default template body which can be changed.

To update the email body content, do the following:

- Select the mail artefact in the process.
- From the **Settings** in the right-side panel, check the **Mail Header** to confirm the **To** field (or email recipients) and the **Subject**. You can adjust the subject and recipient, if needed.
- You may also add someone in **CC**.
- Click to '**Open Mail Body Editor**'.

Lead Creation Process

Customer Lead Request Form

Set Lead Status Code

Create A New Lead In SAP Sales Cloud V2

Send Mail To Customer

End

Send Mail To Customer

Step Name: Send Mail To Customer

Mail Header

To: Contact Email x

Subject: Lead: Creation Successful - Lead Title x

Additional Options

Mail Body

Open Mail Body Editor

Mail Body has content. Open the editor to view.

- The mail editor allows you to write and adjust text according to your needs. You can also reuse information that has been collected during the process. If you want to use additional process context data, you can simply drag the fields from the left menu to the editor on the right.

For more information on email configuration and text, refer to the below link:

<https://help.sap.com/docs/build-process-automation/sap-build-process-automation/add-mail-notifications-to-process?q=email%20body>

Configure Destination Settings

Actual destinations that are created in SAP BTP cockpit will be required when you deploy the process. This actual destination will be mapped the destination environment variables during deployment.

For this package following destination needs not be configured in the SAP BTP cockpit:

- **sap_salescloudv2:** To provide API access to the SAP Sales Cloud Version system2

Note: Above destination name have been configured in BTP but can be named as per the project requirement.

To configure destination,

- click on **Settings**.
- Select **Destinations** from the left panel.
- Click **New Destination**

Select these destinations to be added (Created in the above section). For more information and screen shots, please refer to the below link:

- <https://help.sap.com/docs/build-process-automation/sap-build-process-automation/manage-destinations?q=destination%20setting>

Release and Deploy Process

After configuring your process, it's time to publish, test and run it. To run a process, you must first release and deploy it.

Release - This locks the version of your process, meaning that no further edits can be made to that version. At this stage, the process can't be run and isn't available to participants yet.

To release a version of your process,

- First ensure that the status is listed as **'Editable'**.
- Then click **'Release'**:

Name	Description	Type	Last Edited	Last Edited By	Created On
Assigned Leads	Data type to hold lead assignment details	Data Type	A day ago	ajay.nayak01@sap.c om	June 19, 2024
Attended Trigger Launcher For Round Robin Lead Assignment	Project Launcher to run the main automation-Fetch Sales Employees From Sales Org Unit, in attended mode	Project Launcher	A day ago	ajay.nayak01@sap.c om	June 19, 2024
Customer Lead Request Form	Form to collect customer and product details for lead creation in the SAP Sales Cloud V2 system	Form	A day ago	ajay.nayak01@sap.c om	June 19, 2024
Fetch Open And Assigned Leads	Automation to fetch qualifying leads for round robin and existing leads of employees	Automation	A day ago	ajay.nayak01@sap.c om	June 19, 2024
Fetch Sales Employees From Sales Org Unit	Main automation to fetch sales organization and sales employee details from the SAP Sales Cloud V2 system	Automation	A day ago	ajay.nayak01@sap.c om	June 19, 2024
Lead Creation Process	Main process to create a lead via form in the SAP Sales Cloud V2 system	Process	A day ago	ajay.nayak01@sap.c om	June 19, 2024
Populate Lead Assignment Report Headers	Automation to create excel report headers of the round robin lead assignment run	Automation	A day ago	ajay.nayak01@sap.c om	June 19, 2024
Populate Log Report Values	Automation to populate the employee and lead status information values in the log report	Automation	A day ago	ajay.nayak01@sap.c om	June 19, 2024
Round Robin Assignment Of Open Leads	Automation to assign leads in a round robin fashion to the appropriate sales employee and update it in the SAP Sales Cloud V2 system	Automation	A day ago	ajay.nayak01@sap.c om	June 19, 2024
Send Round Robin Lead Assignment Report	Automation to send the round robin lead assignment report to the sales org manager (by default) and input email	Automation	A day ago	ajay.nayak01@sap.c om	June 19, 2024

If this is the first time you've released the process, a version labelled 1.0.0 is released. For subsequent releases, you're prompted to select a version type before the process is released.

Deploy – This takes a released version of a process and enables it to be actively run and monitored. A deployed version of this approval process unlocks the request form, allowing participants to submit requests and the approvers to view items in their inbox.

To deploy a released version of your process,

- First ensure that the status is listed as '**Released**'.
- Then click '**Deploy**'.

For more details on release and deployment, refer to the below link:

- [Deploy a Project | SAP Help Portal](#)

To deploy your project, you will be prompted to provide a 'Destination' as an environment variable. Select the destination from the drop-down.

Note: If you do not map your destination environment variable with actual SAP BTP destination during deployment, then the process will enter erroneous state when it tries to connect to the external system

For more details about the Destination artefact, please read our [documentation](#).

User Guide

Capabilities

This sample content contains the following elements as key artifacts (detailed explanation with snapshots also provided in later section of the document):

For detailed information about different artifacts, please refer [help documentation](#).

Icon	Type	Name	Description
	Process	Lead Creation Process	This process uses a form trigger to accept customer inputs to create a lead in the Sales Cloud V2 system.
	Automation	Fetch Sales Employees From Sales Org Unit	This is the main automation in the round robin assignment of leads. It fetches sales org unit details along with details of its sales employees and manager.
	Automation	Fetch Open And Assigned Leads	This automation fetches qualifying leads which are in the 'Open' and 'Accepted' state and don't have a lead owner. Based on the inputs, leads can be filtered out based on who has created them. This automation also fetches the existing leads assigned to the sales employees to determine their load and position in the queue for the round robin lead assignment
	Automation	Round Robin Assignment Of Open Leads	This Automation assigns the qualifying leads to the sales employees as its lead owner based on their position in the round robin queue and threshold limit input.
	Automation	Create Lead Assignment Report Headers	This automation populates the excel log report with header data.
	Automation	Populate Log Report Values	This automation populates the excel log report with line-item data of leads and employees
	Automation	Send Error And Success Email	This automation notifies the input email user and sales org manager about the round robin assignment run along

			with the log report as attachment.
	Form	Customer Lead Request Form	This is the form used to collect user inputs to create a lead in the Sales Cloud V2 system.
	Data Type	Assigned Leads	This data type is used to hold lead assignment and employee details.
	Decision	Set Lead Status Code	The decision to set the lead's status code to 1 (Open) during lead creation via form
	Project Launcher	Attended Trigger Launcher For Round Robin Lead Assignment	Project Launcher to run the main automation- 'Fetch Sales Employees From Sales Org Unit', in attended mode

Action Project:

The action projects that have been used in this content package template are: **'Create And Update Lead Detail In Sales Cloud V2 Action'** and **'Get Organizational Unit Details From Sales Cloud V2 Action'**. These are 'ready to use' projects that are available in SAP Business Accelerator Hub.

Below are the APIs from the action projects that are used in the content:

Action Project: 'Create And Update Lead Detail In Sales Cloud V2 Action'

[GET /sap/c4c/api/v1/i18n-service/genders](#) - Contact Gender
[POST /sap/c4c/api/v1/lead-service/leads](#) - Create a new lead.
[GET /sap/c4c/api/v1/i18n-service/countries](#) - Get Country List
[GET /sap/c4c/api/v1/timeline-service/timelineEvents](#) - Get Lead Timeline
[GET /sap/c4c/api/v1/iam-service/users](#) - Get User Details
[GET /sap/c4c/api/v1/product-service/products](#) - Lead Products
[GET /sap/c4c/api/v1/lead-service/leads](#) - Query leads.
[GET /sap/c4c/api/v1/lead-service/leads/{id}](#) - Retrieve a lead by ID.
[PATCH /sap/c4c/api/v1/lead-service/leads/{id}](#) - Update Lead Details

Action Project: 'Get Organizational Unit Details From Sales Cloud V2 Action'

[GET /sap/c4c/api/v1/organizational-unit-service/organizationalUnits](#) – Query organizational units

Processes

Lead Creation Process

This process is triggered by the 'Customer Lead Request Form'

On successful trigger, the process starts to create a lead in the SAP Sales Cloud V2 system and notifies the customer about the lead creation. This can be monitored in the 'Monitor' section of the SAP Build Process Automation tool.

The process connects to the SAP Sales Cloud V2 system and executes the **POST** /sap/c4c/api/v1/lead-service/leads API to create the lead.

Forms

This template includes following form:

- 'Customer Lead Request Form' - This form collects the customer and lead information necessary to create a lead in the SAP Sales Cloud V2 system.

It uses the following API's for value helps:

API Name	API Link	Purpose
GET /sap/c4c/api/v1/i18n-service/countries	Not Available	To fetch the list of countries to which a customer creating the lead belongs to
GET /sap/c4c/api/v1/i18n-service/genders	Not Available	To fetch a list of contact person's gender
GET /sap/c4c/api/v1/product-service/products	Not Available	To fetch a list of products from the SAP Sales Cloud V2 system for which a lead may be created.

Decisions

Set Lead Status Code

This decision is used set the status code of the lead to 1(Open) during lead creation.

Automations

Fetch Sales Employees From Sales Org Unit:

This is the main automation to fetch sales organization unit and sales employee details from the SAP Sales Cloud V2 system.

This automation uses the below API calls:

API name	API Link	Purpose
GET /sap/c4c/api/v1/organizational-unit-service/organizationalUnits	https://api.sap.com/api/SalesSvcCloudV2_organizationalUnitService/overview	Manage entities from organizational unit service
GET /sap/c4c/api/v1/iam-service/users	Not Available	To get user details

Fetch Open And Assigned Leads:

This automation fetches qualifying leads which are in the 'Open' and 'Accepted' state and don't have a lead owner. Based on the inputs, leads can be filtered out based on who has created them.

This automation also fetches the existing leads assigned to the sales employees to determine their load and position in the queue for the round robin lead assignment

This automation uses the below API calls:

API name	API Link	Purpose
GET /sap/c4c/api/v1/lead-service/leads	https://api.sap.com/api/SalesSvcCloudV2_lead/overview	To query leads
GET /sap/c4c/api/v1/timeline-service/timelineEvents	Not Available	To read a lead's timeline
GET /sap/c4c/api/v1/iam-service/users	Not Available	To get user details

Round Robin Assignment Of Open Leads

This automation is used to assign leads in a round robin fashion to the appropriate sales employee and update it in the SAP Sales Cloud V2 system.

This automation uses the below API calls:

API name	API Link	Purpose
GET /sap/c4c/api/v1/lead-service/leads/{id}	https://api.sap.com/api/SalesSvcCloudV2_lead/paath/readleadservice_lead	To fetch the ETag value of a particular lead to be updated.
PATCH /sap/c4c/api/v1/lead-service/leads/{id}	https://api.sap.com/api/SalesSvcCloudV2_lead/paath/readleadservice_lead	To update the lead with the new owner information using

		previously fetched ETag
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Create Lead Assignment Report Headers

An automation to create excel report headers of the round robin lead assignment run. It creates individual sheets for the lead status, employee status and the automation inputs.

Populate Log Report Values

An automation to populate the employee and lead status information values in the log report.

Send Error And Success Email

An automation to send the round robin lead assignment report to the sales org manager (by default) and input email user.

Automation Inputs

The round robin lead assignment is triggered via the main automation 'Fetch Sales Employees From Sales Org Unit'. It can be triggered in an attended or unattended mode and accepts the following mandatory inputs:

Input Field Description In Attended Trigger	Input Field Equivalent In Unattended Trigger(technical name)	Possible Input Values	Description
Sales Org Unit Display ID	SalesOrgUnitDisplayID	<Sales Organization Unit Display Id_Value>	The display Id of the sales organization unit from where sales employees will be fetched
Lead Created By User - Display ID	LeadCreatedByUserDisplayId	'NA'	Not Applicable – In this case, the automation fetches all leads in the SAP Sales Cloud V2 system, which do not have an owner, regardless of who created the lead.
		OR	OR
		<Display ID Of The User Who Created The Lead_Value>	In this case, the automation fetches all leads in the SAP Sales Cloud V2 system, which do not have an owner and created by the specified user
Specific Lead's Display ID Without An Owner	SpecificLeadDisplayIdWithout Owner	'NA'	Not Applicable – In this case, all leads without owners are fetched from the SAP Sales Cloud V2 system
		OR	OR
		< A Specific Lead's Display ID_Value>	In this case, only a single specific lead without owner is fetched from

			the SAP Sales Cloud V2 system. This allows you to target a specific lead for owner assignment
Max Lead Threshold Limit Per Sales Employee	LeadThreshold	<Lead Threshold_Value>	This defines the maximum number of leads a sales employee is allowed to have at a given time. It limits over assignment of lead ownership to sales employees
Local Path To Save Log File	PathForLogFile	<Local File Path_Value> ex. C:\users\Documents\RoundRobinLogs	The file path on the local system where the log file is to be saved.
Additional Email To Notify	EmailIdToNotify	<Email Id Of Additional person to Notify_Value>	An additional email Id of a person to be notified in addition to the sales org unit manager's ID, who is notified by default.

Attended and Scheduled (Unattended) Triggers

The round robin lead assignment package can be triggered by both attended and scheduled(unattended) triggers using the main automation- **'Fetch Sales Employees From Sales Org Unit'**. For more information on creating triggers please follow this [Link](#)

Support

There is no support available for the learning content.

This template can be modified using SAP Process Automation. For example: add decision to determine the approver based on a certain business logic or add an action to post collected information to backend SAP system. Refer [Help Portal](#) for more details.

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