# Product Documentation

## maiCatch for SAP® Sales Cloud

cxAddOns

Global AddOn specialist for Enterprise Software.

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# 1 Introduction

## 1.1 Technical Requirements

To be able to use maiCatch, the following software is required:

- SAP C4/HANA
  - SAP Sales Cloud / SAP Service Cloud
- maiCatch

### 1.1.1 SAP Sales Cloud / Service Cloud

Users who are supposed to use maiCatch need permission to execute the SAP Sales Cloud / Service Cloud OData services listed below. Since it is related to the work center view the relevant permission should already be enabled for those users:

- C4CODATAAPI

### 1.1.2 maiCatch OS Requirements

The following operation system versions are required to run maiCatch on your mobile device:

| Operation System | Supported Version |
|---|---|
| **Apple iOS** | 15.8 (and higher) |
| **Google Android** | 13 (and higher) |

Table 1: maiCatch OS Requirements

## 1.2 Deployment Options

Based on your needs we support two different deployment options in terms of the authentication method used:

- Basic
- Single-Sign-On

### 1.2.1 Basic Authentication

In this deployment scenario the user logs in to maiCatch with the basic authentication credentials used for the SAP Sales Cloud / Service Cloud. If maiCatch can authenticate the user against the SAP Sales Cloud / Service Cloud tenant, he is registered as maiCatch user. maiCatch is using these credentials to access the SAP Sales Cloud / Service Cloud with the user's credentials.

The credentials can be stored in the secure storage area of the mobile device so that the user does not need to provide his credentials after each app restart.

### 1.2.2 Single-Sign-On

For the best user experience and secure access to SAP Sales Cloud / Service Cloud we suggest integrating maiCatch with your company's identity provider (IdP) which is also used to log in to the SAP Sales Service Cloud.

In this deployment scenario maiCatch is added as an OAuth 2.0 client in your SAP Sales Cloud / Service Cloud. Additionally, maiCatch is added as a trusted application in your IdP. maiCatch then forwards the authentication request to your IdP and upon successful authentication uses the SAML token to access SAP Sales Cloud / Service Cloud in the name of the user. The token can be stored in the secure storage area of the mobile device so that the user does not need to provide his credentials after each app restart.

In the illustration below you can see the SAML authentication flow. In this illustration the service provider is the maiCatch backend, and the browser is either the maiCatch app or the maiCatch admin cockpit.

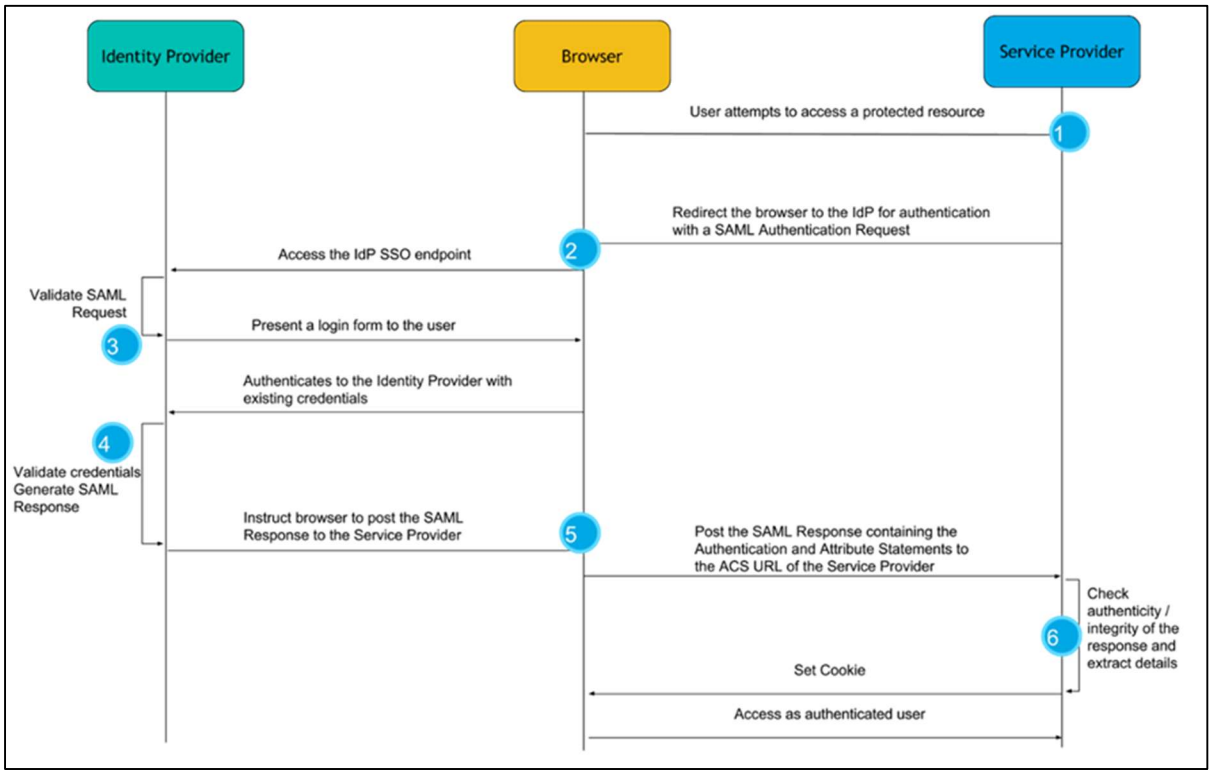


Figure 1: SAML Authentication Flow

## 1.3 Support

If you have any questions or comments about this document, the descriptions contained therein or maiCatch in general, please contact the support by sending an e-mail to support.cxaddons@nagarro.com.

In addition, https://cxaddons.statuspal.io/ offers you the opportunity to find out about planned maintenance work or incidents affecting our products at any time.

# 2 Mobile App

## 2.1 Download App

You can download the app in the Google Play Store or the App Store – just search for “maiCatch”.

GET IT ON Google Play  Download on the App Store

## 2.2 Configure App

After you start the application you will see a welcome screen with the option to connect maiCatch to your SAP Sales Cloud / Service Cloud via QR code or start a free trial. In addition to that, maiCatch can also be used in combination with a mobile device management (MDM). More on that below.

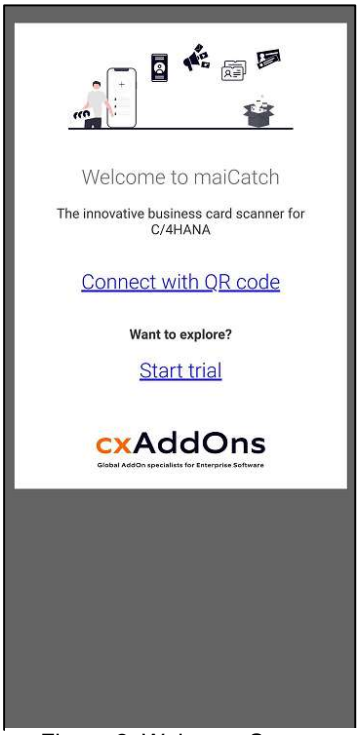

Figure 2: Welcome Screen

### 2.2.1 Connect with QR code

If your company purchased maiCatch and after it was deployed to the system, your system administrator can provide you with a unique QR code allowing you to easily establish a connection to the SAP Sales Cloud / Service Cloud system.

Clicking on “Connect with QR code” will start the camera (You need to grant maiCatch access to the camera). Scanning the QR code will forward you to the login page of your identity provider. Once logged in, maiCatch is connected to the respective SAP Sales Cloud / Service Cloud system.

### 2.2.2 Using a mobile device management system

In case your company is using a mobile device management system the administrator has the option to push a defined configuration of the app to all users. In this case, there is no need for a user to scan a QR code in order to connect to the system. The following properties are available for the configuration of maiCatch in connection with the use of a mobile device management system. The respective values can be determined from the QR code or requested from support.

| Property name | Type | Description |
|---|---|---|
| **maiCatchAuthType** | String | Type of authentication |
| **maiCatchOauthAuthEndpoint** | String | OAuth authentication endpoint |
| **maiCatchOauthClientId** | String | OAuth client ID |
| **maiCatchOauthEndUserUI** | String | End user UI of the OAuth server |
| **maiCatchOauthTokenEndpoint** | String | OAuth token fetch endpoint |
| **maiCatchOauthRedirectUrl** | String | OAuth redirect URL |
| **maiCatchServerHost** | String | Mobile services endpoint |

Table 2: maiCatch Properties for Mobile Device Management (MDM)

**Basic Authentication**

For basic authentication the following properties are required:

- maiCatchAuthType
- maiCatchServerHost

**Single-Sign-On (SSO)**

SSO requires the following properties:

- maiCatchAuthType
- maiCatchOauthAuthEndpoint
- maiCatchOauthClientId
- maiCatchOauthEndUserUI
- maiCatchOauthTokenEndpoint
- maiCatchOauthRedirectUrl
- maiCatchServerHost

### 2.2.3 Start trial

The free trial can be used to explore maiCatch and all its functions[1] free of charge for a period of 2 weeks. A maximum of 5 users per SAP Sales Cloud / Service Cloud tenant can register for the trial. Once the trial phase is expired it can be extended once – please contact cxAddOns via support.cxaddons@nagarro.com. Clicking on "Start trial" you can either log in (if you are already registered) or register.

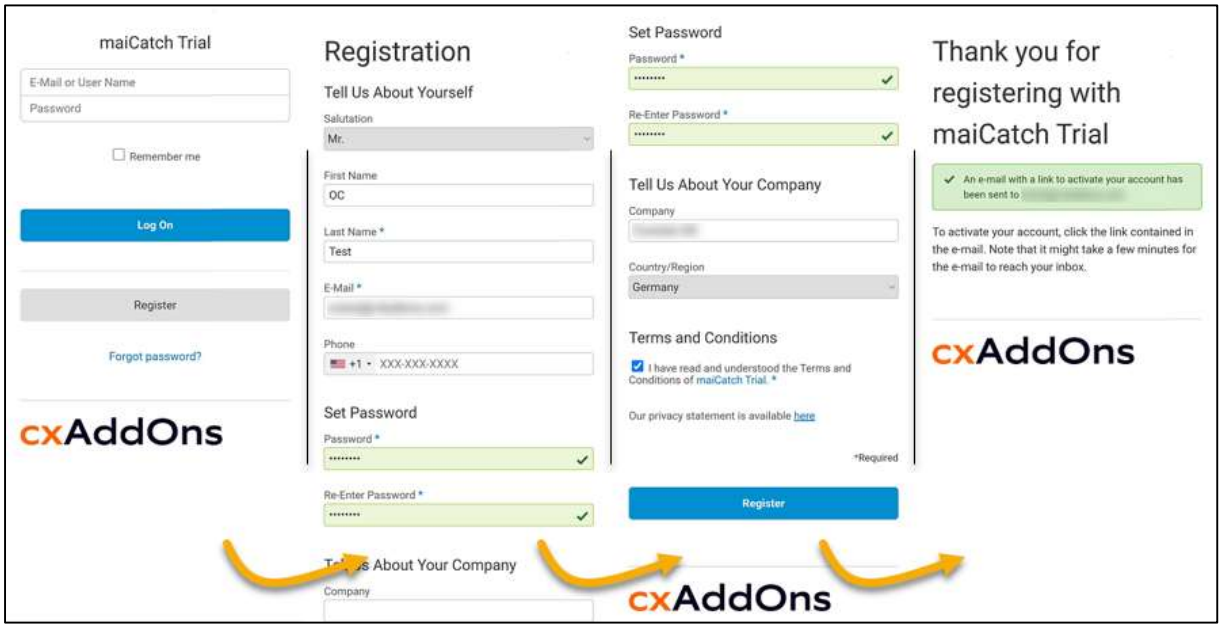


Figure 3: Trial Registration Process

Once registered, close and restart the app to log in with your newly registered user[2]. You'll get prompted to enter the connectivity details of your SAP Sales Cloud / Service Cloud System. Save your settings and start exploring maiCatch!

[1] This does not include access to the admin cockpit. Please note that a default setup is predefined and there is no possibility to customize individual options.
[2] An automated e-mail will be sent to you during the registration process – please check!

## 2.3 Logon

As described above after the configuration the app will

- forward the user to the logon page of the identity provider (SSO), or
- show a username / password form where the user logs on with SAP Sales Cloud credentials (Basic Authentication)

After this you will be asked to setup an app code and activate TouchID / FaceID. Depending on the configuration this step can be skipped.

## 2.4 App Overview

Once the initial setup is completed and you've successfully logged in, you are presented with the home screen. Here you can find the different options of maiCatch, divided into 5 areas:

- Catches
- Offline Queue
- Input Source
- Language Settings
- Application Settings

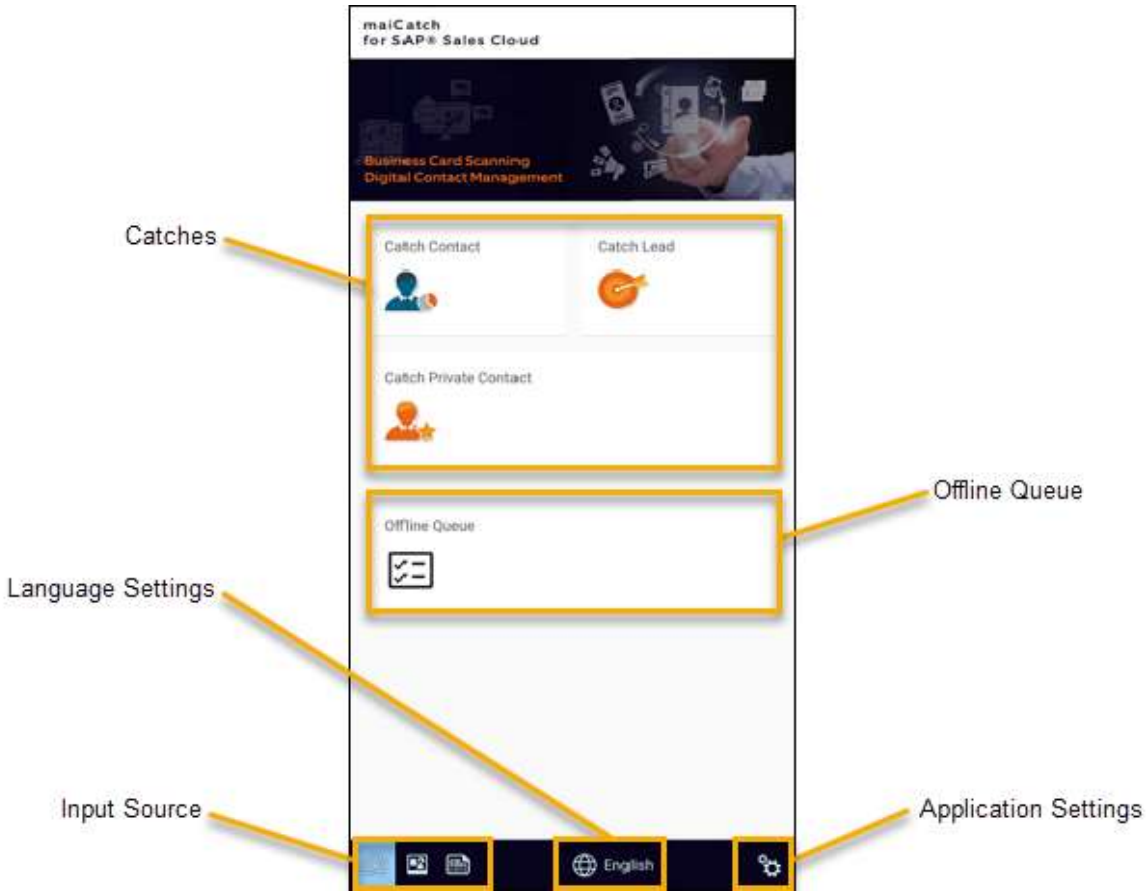


Figure 4: App Overview – Home Screen

### 2.4.1 Catches

This is the entry point to start any of the different catch processes. In the admin cockpit, your system administrator can define which tiles / options[1] are displayed for your company. If your company does not work with individual customers in SAP Sales Cloud / Service Cloud you might not even see the option “Catch Private Contact”.

Clicking one of the tiles will start the OCR processing. Based on the chosen input source and language settings you will get presented with the results of the OCR scan.

### 2.4.2 Offline Queue (Basic functionality)

With release 2106 maiCatch introduced some basic offline functionality. This can be very useful if a user has no access to internet at all – or if the connection rate is very low.

This way - even without internet connection - the user can catch business cards, capture the data and assign content manually to the corresponding fields. Instead of saving the results directly to SAP Sales Cloud / Service Cloud, the user can save the entries to an offline queue. They can later be processed / transferred to SAP Sales Cloud / Service Cloud once the internet connection has been re-established. Further info on this can be found in the Chapter Offline Queue (see 0).

### 2.4.3 Input Source

There are three different options you can select as input source:

- Scanning directly via **camera**
- Catching a lead / contact from a picture in your **gallery**
- Scanning a **QR code**

Selecting one of the first two options allows for scanning not only business cards, but any kind of text including contact information (e-mail signatures, construction site signs, …).

#### 2.4.3.1 Limitations on Android 11 devices

With some of the changes introduced with Android 11, some restrictions apply:

- **Camera:** Catching via camera automatically starts the data extraction & recognition process. The user is not taken to the gallery app to edit the business card picture first.
- **Gallery:** The built-in gallery app of android devices will not work properly with maiCatch. In case you are experiencing issues, please use Google Photos or a different gallery app from the Play Store.

### 2.4.4 Language Settings

For best results, the language set for the optical character recognition in maiCatch should match the language of the scanned text. In most cases ‘English’ will work just fine. However, with special characters like *ç*, *ê* or *ï* (to just name a few), results will be more accurate if the language setting was adapted accordingly.

**Please note:** The language selected here only applies to the optical character recognition[2]. By implication, it does not mean that data extraction is supported for the selected language.

[1] The different catch options will be explained in further detail later on. (see chapter 3)
[2] Online mode only.

| List of supported OCR languages | | |
|---|---|---|
| • Chinese (simplified)<br>• Chinese (traditional)<br>• Croatian<br>• Czech<br>• Danish<br>• Dutch<br>• English | • Finnish<br>• French<br>• German<br>• Hungarian<br>• Icelandic<br>• Italian<br>• Japanese<br>• Norwegian | • Polish<br>• Portuguese<br>• Russian<br>• Slovenian<br>• Spanish<br>• Swedish<br>• Turkish |

Table 3: Supported OCR languages

**Please note:** The characters are transferred as they were scanned. This means that Chinese characters or Arabic characters are retained after scanning and are not translated.

## 2.4.5 Application Settings

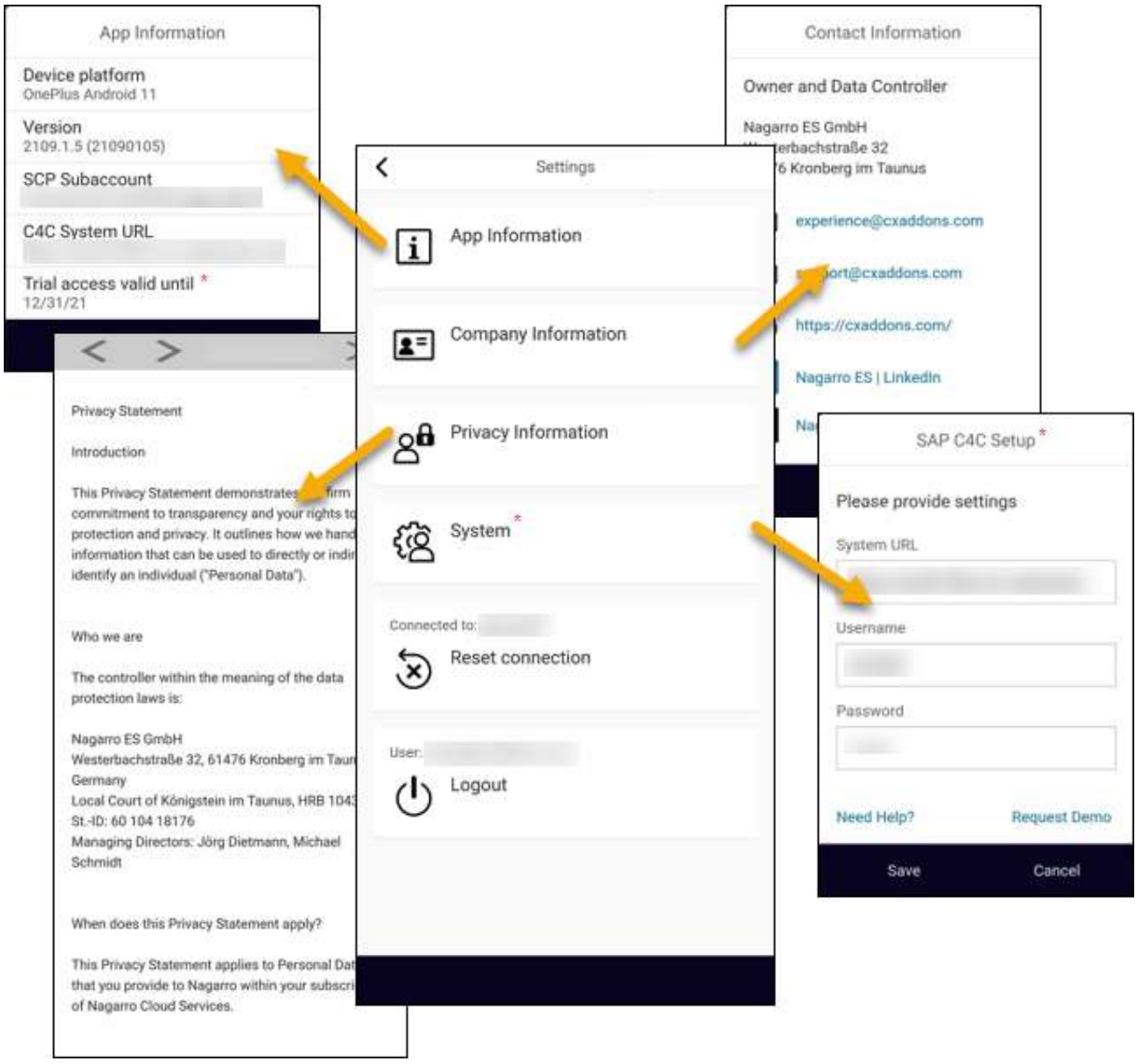


Figure 5: Application Settings

### 2.4.5.1 App Information

Display information about your device / OS version, maiCatch app version as well as the connected subaccount on the SAP Business Technology Platform. For Trial accounts, the date until which the trial is valid will also be displayed (*).

### 2.4.5.2 Company Information

Information about how to get in touch with cxAddOns.

### 2.4.5.3 Privacy Information

The maiCatch privacy policy. Also accessible through the trial registration process.

#### 2.4.5.4 System

This option is only displayed for trial users (*). Here you are displayed with the SAP Sales Cloud / Service Cloud connection details entered after the first launch of the trial. You can change them at any time you like.

#### 2.4.5.5 Reset connection

Option to reset the current connection to a SAP Sales Cloud / Service Cloud system. This can come in handy when changing between a test and a productive system for example.

#### 2.4.5.6 Logout

Log out of the app (this does not cut the connection to the SAP Sales Cloud / Service Cloud system).

# 3 Catches

Each catch process consists of three different steps:

1. Capture: Capture data from input source
2. Edit: Edit contact / company data and / or assign unassigned fields
3. Enrich: Maintain additional data and add attachments

The fields available in step 2 are the same for every customer. However, for step 3 each customer can decide individually which fields their users can maintain for a catch. This can include standard fields as well as customer added fields which are available through the OData interface.

## 3.1 Catch Types

### 3.1.1 Catch Contact

Using this mode, you can:

- Create a new contact and assign it to an existing account
- Create a new contact and assign it to a new prospect
- Update an existing contact

The SAP Sales Cloud business partner role assigned to a prospect which was created via maiCatch can be defined.

### 3.1.2 Catch Private Contact

This option allows for either the creation of new individual accounts or an update of existing individual accounts in SAP Sales / Service Cloud.

### 3.1.3 Catch Lead

Selecting the “Catch Lead” option lets create leads in SAP Sales Cloud. With this catch you create leads in SAP Sales Cloud. You have the option to create a lead without and with a reference to an existing contact and / or account. To be able to create the lead with reference you have to enable this feature in the admin cockpit. If it is enabled, you will be able to use the duplicate and account search to create the reference.

**Surveys**

If you are using surveys as part of your lead process you can directly fill out the survey after catching a lead. For now, maiCatch does only support online surveys, i.e. the user is redirected to the survey dialogue in his SAP Sales Cloud system. To add a survey to a lead you have to configure the following:

- Activity plan
- Routing rule for surveys
- Workflow rule which executes the activity plan when creating a lead.

If you activate the “Survey” feature in the admin cockpit, we will open the lead in an in-app browser after the lead was created (given that a survey is attached).

We suggest setting "*Enable Semi-Collapsed Navigation Menu upon Sign-in*" to YES in the company settings of your SAP Sales Cloud system. Additionally, place the Survey tab as your first tab so that the user can access the survey with just one tap on his mobile device after capturing a lead.

## 3.2 Duplicate Check

The SAP Sales Cloud / SAP Service Cloud Duplicate Check is fully available as a service for our app. Alternatively, we have implemented our own search for accounts - the results will differ and cannot be compared. The SAP search is usually faster than ours, but unfortunately also more superficial. You can therefore use a button in the admin cockpit to select where your company's individual preference lies.

The "Standard Duplicate Search" is available for contacts, individual customers & accounts.

The account search allows you to exclude certain business partner roles from the search result.

Please also note that the duplicate check only works in online mode. For offline catches there is no duplicate check for any of the above objects.

### 3.2.1 Account duplicate check

During the maiCatch account duplicate check, customers are searched according to the following criteria. The basis of this is always the user input in the maiCatch APP.

- by the complete account name
- by the name without the legal form
- by the single separated words, if the account name is more than 5 characters long and contains spaces between the words.

All found accounts are sorted in descending order according to the duplicate probability. For example, if a found customer has the same city as the user input in the maiCatch app, this increases the probability.

maiCatch uses the OData interface c4codataapi for this and the CorporateAccountCollection to query the customers.

### 3.2.2 Catch Contact

Checks if contact person exists in SAP Sales / Service Cloud.

If the user chooses an existing contact person maiCatch will update it

- If no contact person exists or the user does not choose a listed contact person: search if account (or prospect) already exists. User can again choose an existing account or continue without account.
- If the user chooses an existing account or prospect, maiCatch will create a new contact person for this account / prospect.
- If the user does not choose an existing account maiCatch will create a prospect and a contact person.

### 3.2.3 Catch Private Contact

Checks if an individual customer already exists in SAP Sales / Service Cloud.

- If the user chooses an existing individual customer maiCatch will update it.

### 3.2.4 Catch Lead

If you enabled referenced leads in the admin cockpit then maiCatch

Checks if contact person exists in SAP Sales / Service Cloud

- If the user chooses an existing contact person maiCatch will update it and reference the lead to the contact person and associated account.
- If no contact person exists or the user does not choose a listed contact person: search if account (or prospect) already exists. User again can choose an existing account or continue without account.
- If the user chooses an existing account or prospect, maiCatch will reference the lead with the chosen account and add the contact person details to the lead
- If the user does not choose an existing account maiCatch will create a lead and add the contact person and account details to the lead without any reference

## 3.3 1, 2, 3 – Capture, Edit, Enrich

### 3.3.1 Capture

The first step of every catch is to capture the data from input source. As already explained in Input Source you have three options to choose from.

maiCatch will execute the optical image recognition and assign it to the standard fields.

### 3.3.2 Edit

In this second step you can verify that the text was recognized correctly and assigned to the right fields. You also edit, fill or re-assign fields from here. Depending on the catch the data is grouped in different tabs. In all catches you will find the tab “Scanned Text”.

**Link existing account**

If you know that an account already exists, you have the possibility to link them through the search buttons. If you do not link a contact or an account maiCatch will automatically execute the Duplicate Check when you navigate to the enrich screen.

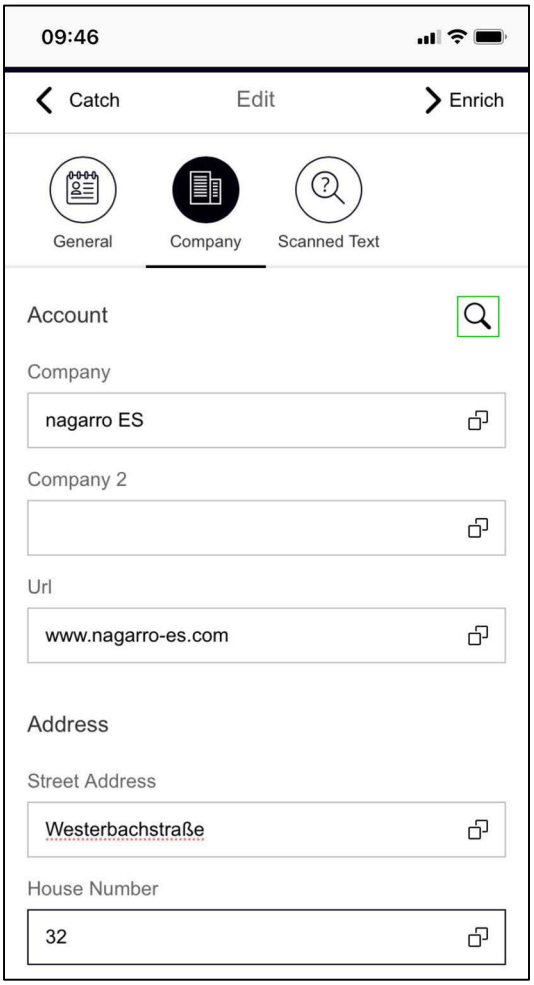


Figure 6: Run account or contact search

### (Re-) Assign Fields

Values that were not automatically assigned to a field are listed in the scanned text tab.

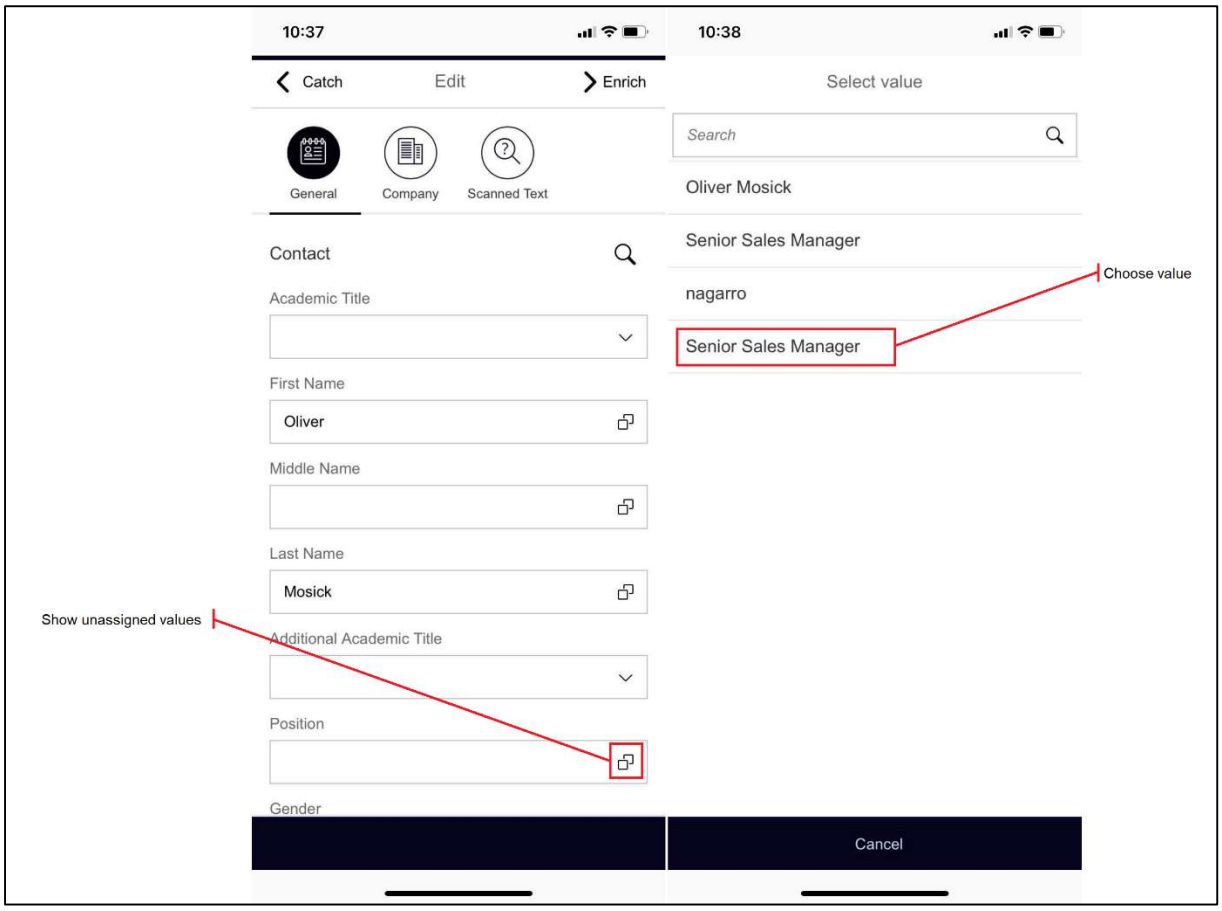


Figure 7: Assign Fields

**Manual content assignment from scanned text dialog**

The “Scanned Text” tab shows the data extracted from the business card per line, i.e. words are grouped together in lines as on the business card, e.g. first name and last name in one line John Doe). To make it easier for the user to assign a single word of a line to a field (e.g. John to first name and Doe to last name), the line is splitted into words which can be selected or removed separately for the field assignment. We split the value into words, which allows you to select and concatenate as you like. The buttons to delete symbols, words or all assist you as well – avoiding the need to slide up the keyboard and type manually.

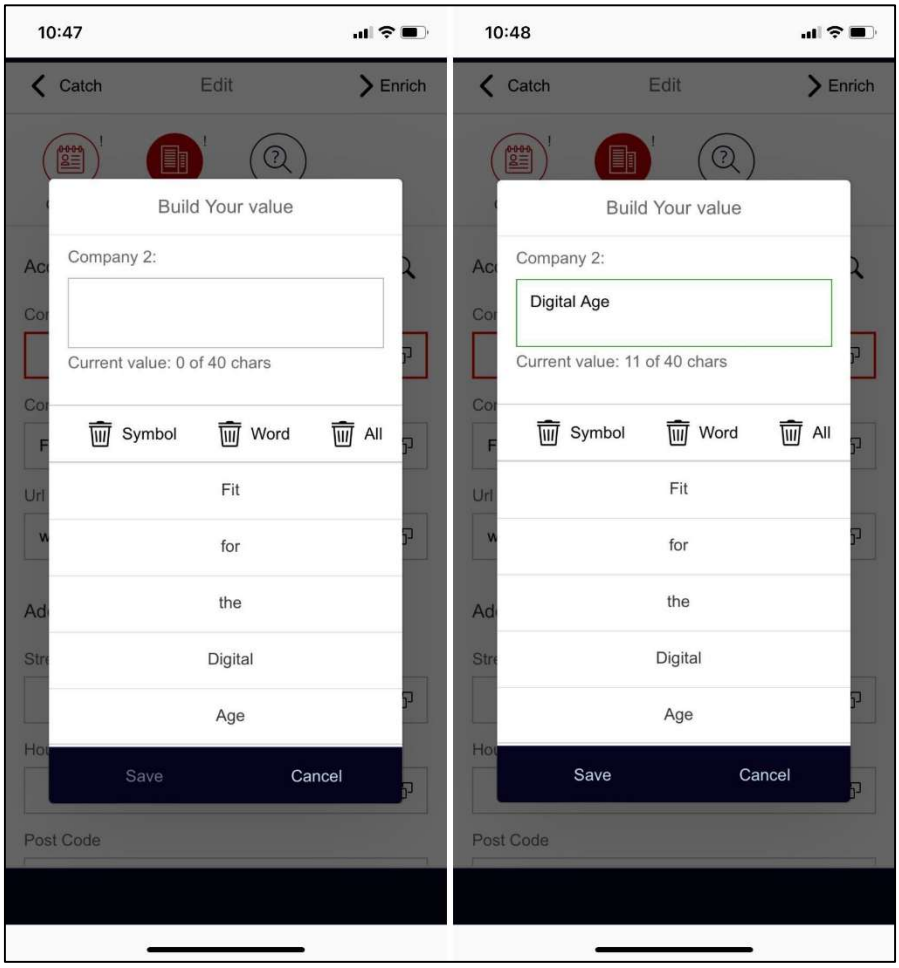


Figure 8: Adjust long field value

**Duplicate Check**

After you have reviewed and edited the data you can navigate to the Enrich screen. maiCatch will automatically check your existing master data by running a duplicate check in two steps –duplicate contacts and duplicate accounts, if no contact was selected. This duplicate check is not executed in case you manually assigned a contact or account before or if you are offline.

### 3.3.3 Enrich

After you have edited the data in the second step you can continue to the third step – enrich catch. This step has two screens, one for additional fields and one for attachments.

### Additional Fields

In this screen you have the option to maintain additional data related to the catch. The fields available can be configured for your system. Focus on fields that are absolutely necessary to later continue the business process in the backend.

The fields can be configured for each catch. Fields can be defined as mandatory. Users cannot save a catch without filling all mandatory fields. Please notice that when offline, only the codelists can be selected (are cached), any other field is not read from SAP Sales Cloud.

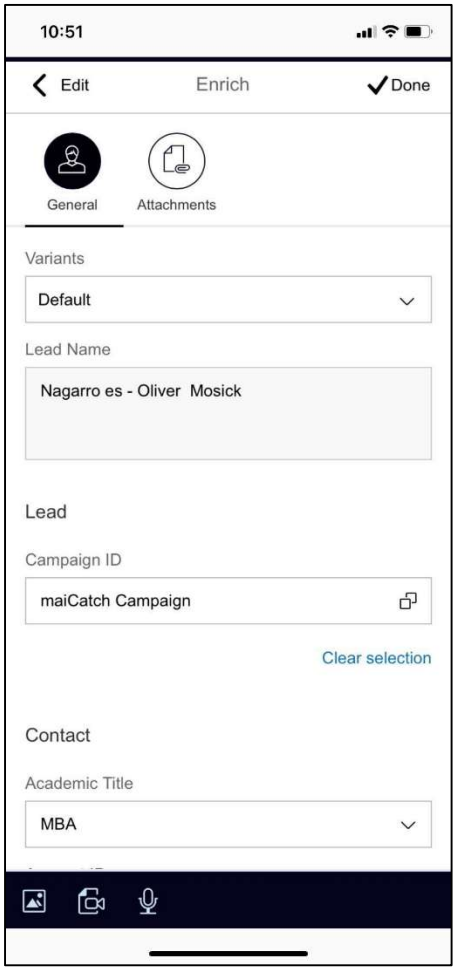


Figure 9: Enrich Catch

### Variants for Additional Fields

A variant defines default values for the additional fields. Variants are defined by the business administrator for each catch. When you select a variant from the drop down, the additional fields are filled with the default values. maiCatch remembers the last selected variant for your convenience.

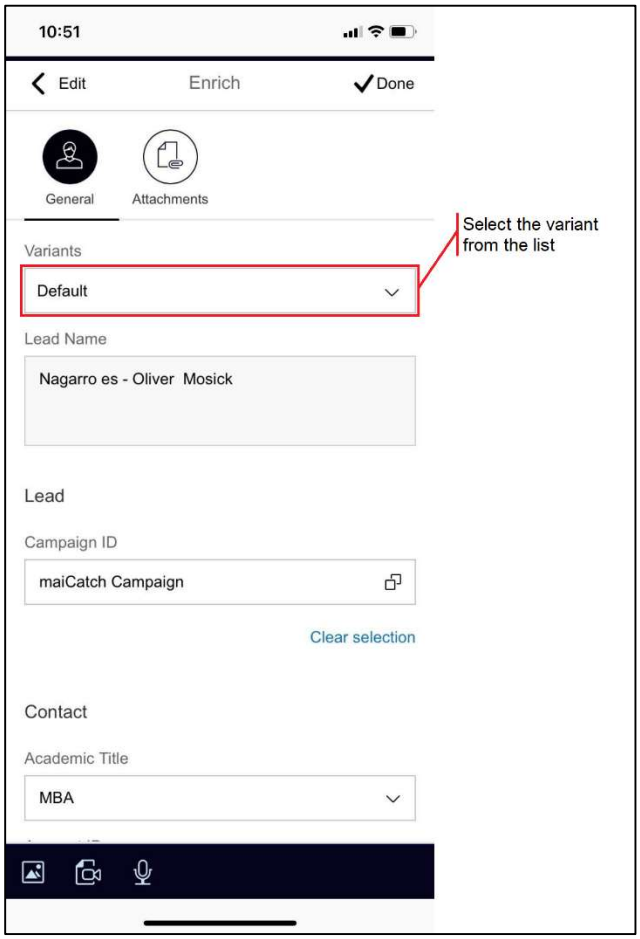


Figure 10: Variants for Additional Fields

### Attachments

Attachments can also be added to a catch if needed. The input document will be added automatically as business card to the object in SAP Hybris Cloud for Customer.

You have the option to choose attachments from:

- Picture from camera
- Video from camera
- Voice recording

In order to use these functions, you have to give maiCatch access to the phone resources. On the first use you will be asked to allow access. If you have denied the access once you can change allow it again in the phones operating system settings.

Please see the section Attachments of the chapter SAP Sales / Service Cloud Configuration on prerequisites for the support of attachment upload.

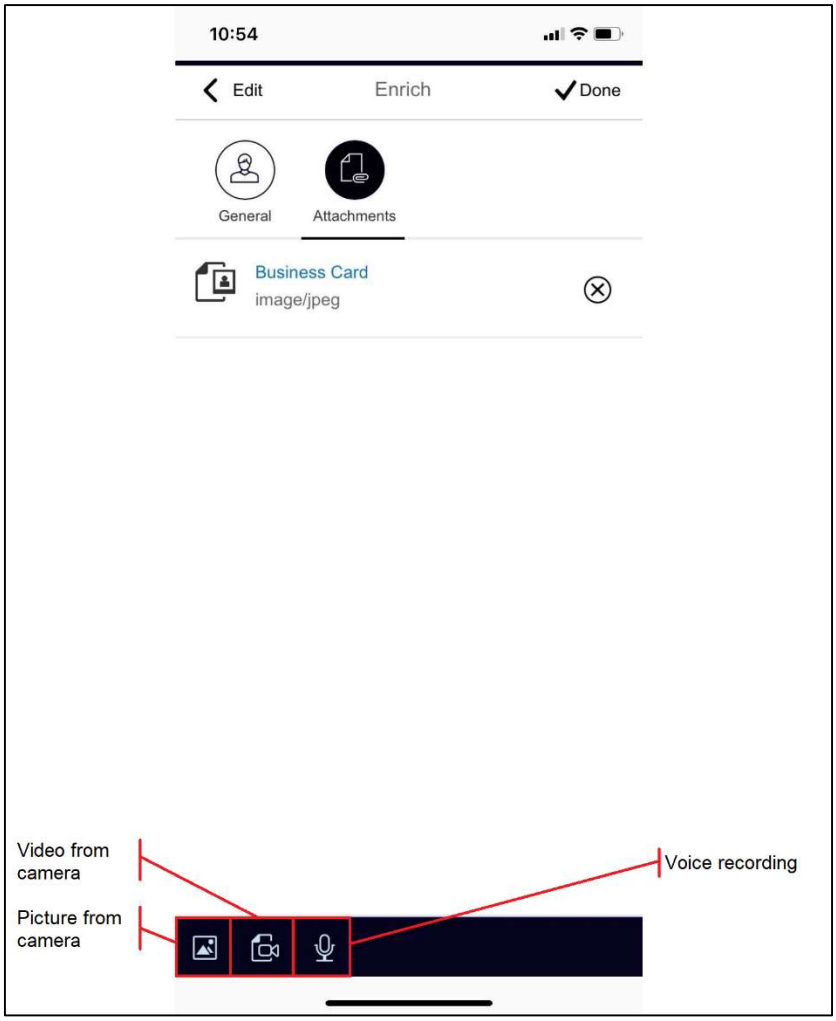


Figure 11: Attachments

## 3.4 Offline Queue

In offline mode the user can catch business cards without an internet connection, capture the data and assign the content manually to the corresponding fields and save the input into an offline queue. The entries in the queue can be synchronized afterwards to SAP Sales Cloud when the user has again connectivity.

All types of catches work also in offline mode as explained in chapter Catches. Besides codelists which are cached any data from SAP Sales Cloud (e.g. enrich fields) as the duplicate check as well do not work in offline mode, since there is no internet connection.

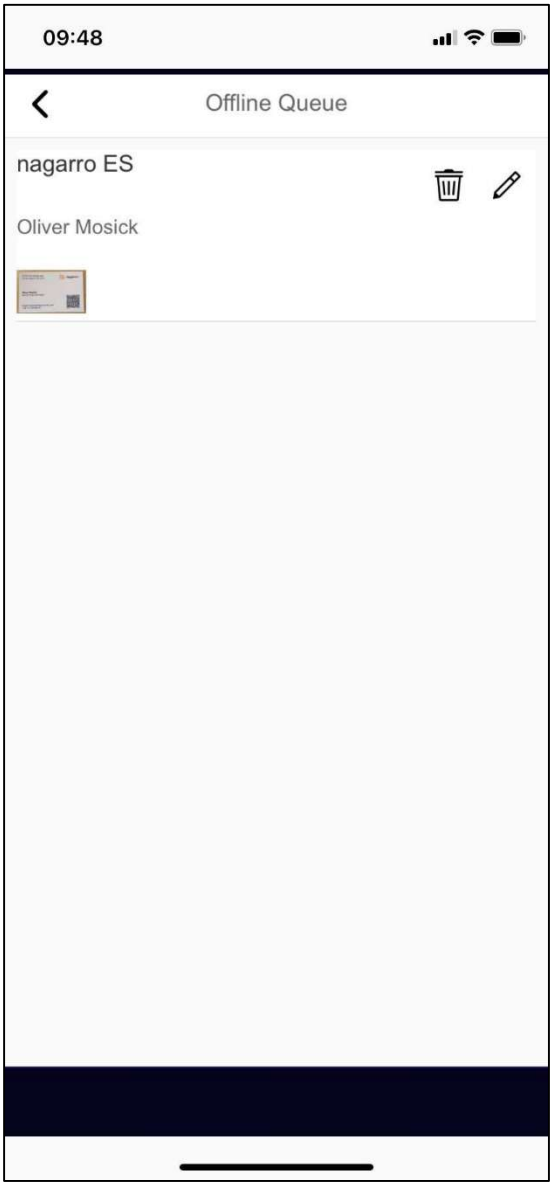


Figure 12: Offline queue

Once it is saved, the catch is displayed in the Offline Queue. Attachments can be visualized and the content edited again if needed.

In order to synchronize with SAP Sales Cloud the user must be online and edit the catch, go through the steps edit, enrich and save, and save it to SAP Sales Cloud.

Please note that for using maiCatch offline the user must start at least once the application online i.e. with internet connection, in order to load any master data from his SAP Sales Cloud system and the custom configuration setup.

# 4 Admin Cockpit

We allow you to configure maiCatch through an admin application. The access to the application can be restricted to single users or a user group.

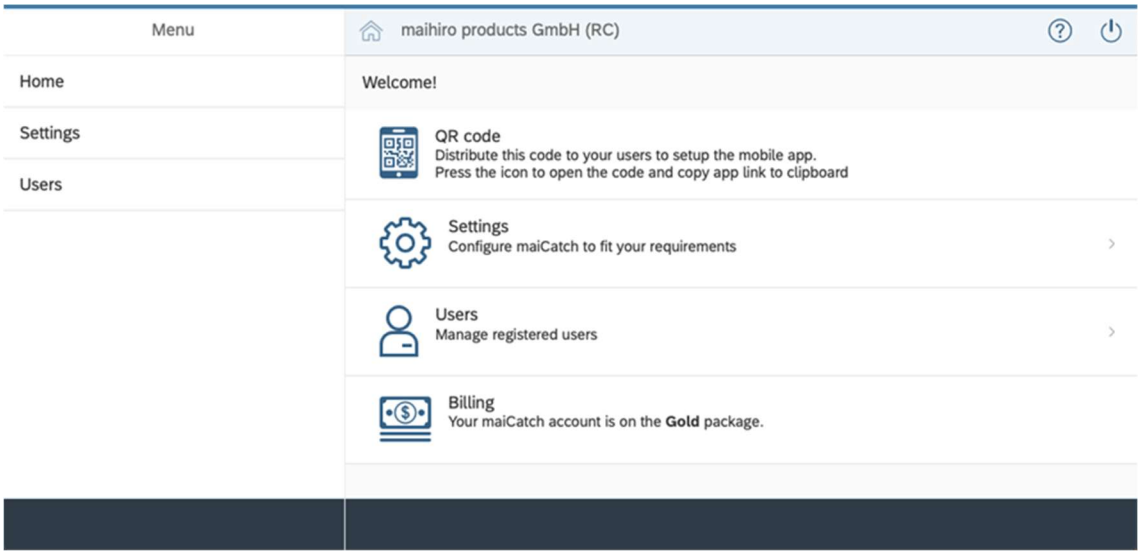


Figure 13: Admin Cockpit Home Screen

If you did choose to use Basic Authentication as deployment option, you can provide your SAP Sales Cloud credentials after logon. This allows the admin cockpit to access metadata directly from your SAP Sales Cloud system.

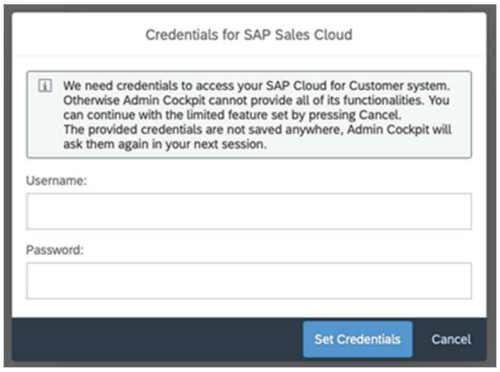


Figure 14: Admin Cockpit - Credentials for SAP Sales Cloud

On the home screen you have direct access to the QR code. If you click on the QR code, it will open it and copy the link to the QR code application to the clipboard. You can distribute this link to your users, so they can configure their mobile application.

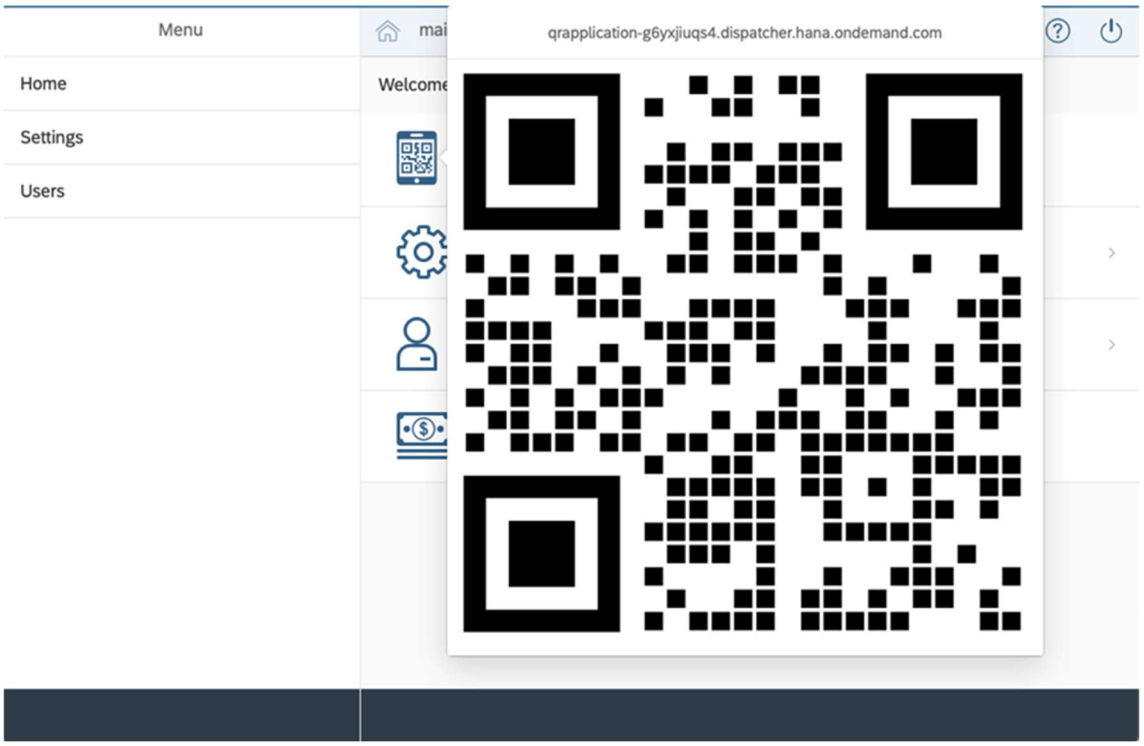


Figure 15: QR code for mobile app setup

## 4.1 Settings

From the settings page you can maintain General Settings and Catch Settings which are specific to a catch. Also, you see if a catch is active or not.

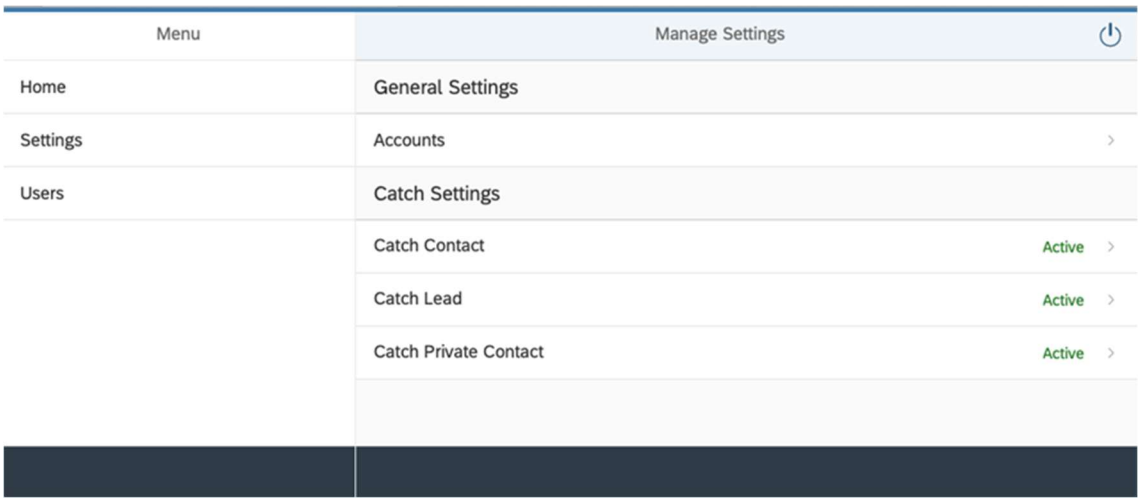


Figure 16: Manage Settings

For each catch you can turn on the catch, configure catch specific settings (if applicable), configure Standard Fields, add Enrich Fields and define Variants.

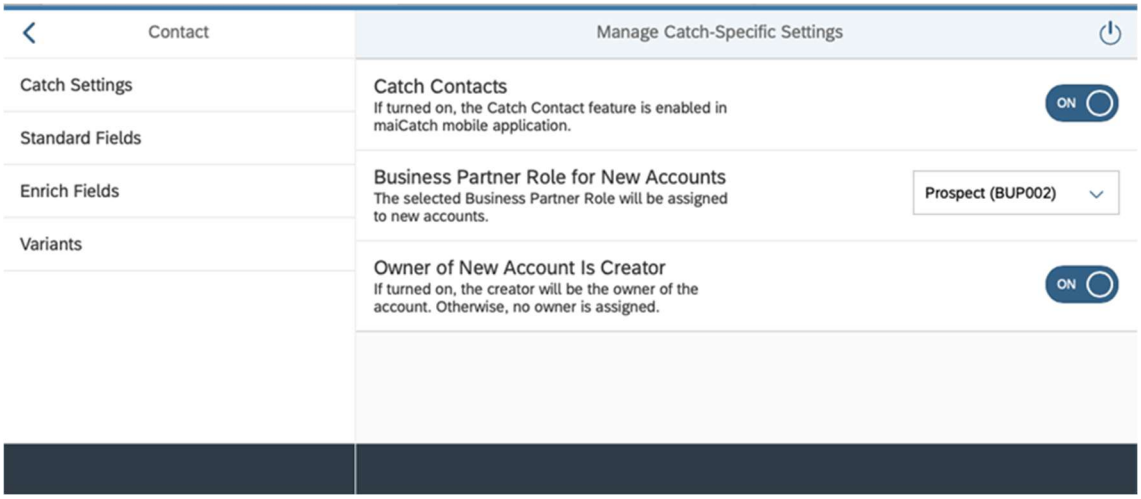


Figure 17: Configure Catches

### 4.1.1 General Settings

#### Accounts

You can define which account roles should be excluded from the search result of the account search used by Catch Contact and Catch Lead. You cannot exclude the account role which is used to create new accounts.

Additionally, you can choose which kind of account duplicate check should be used: our default implementation or the SAP standard one.

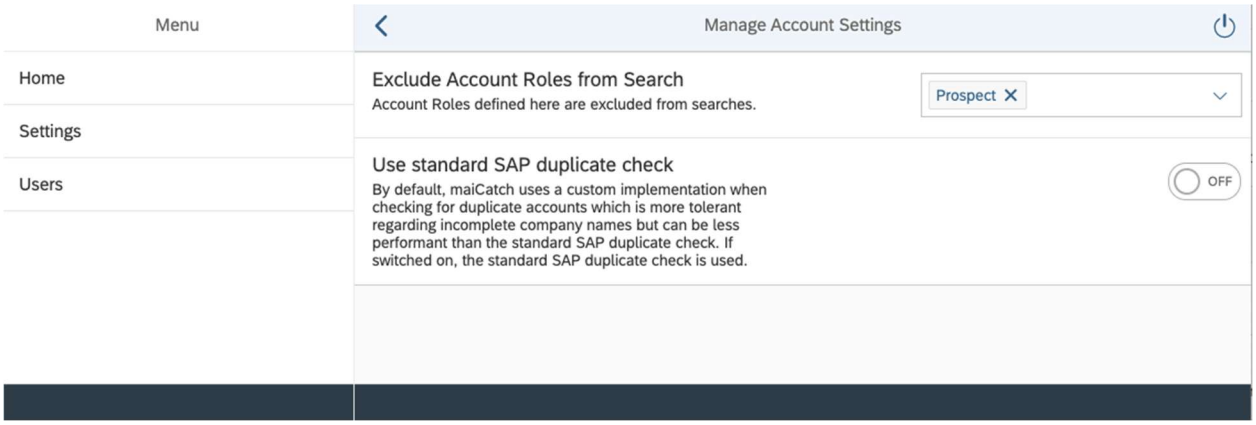


Figure 18: Exclude Account Roles from Search and Duplicate Check

### 4.1.2 Catch Settings

Some catches allow you to set catch specific settings. This can be done in the “General Settings” of each catch.

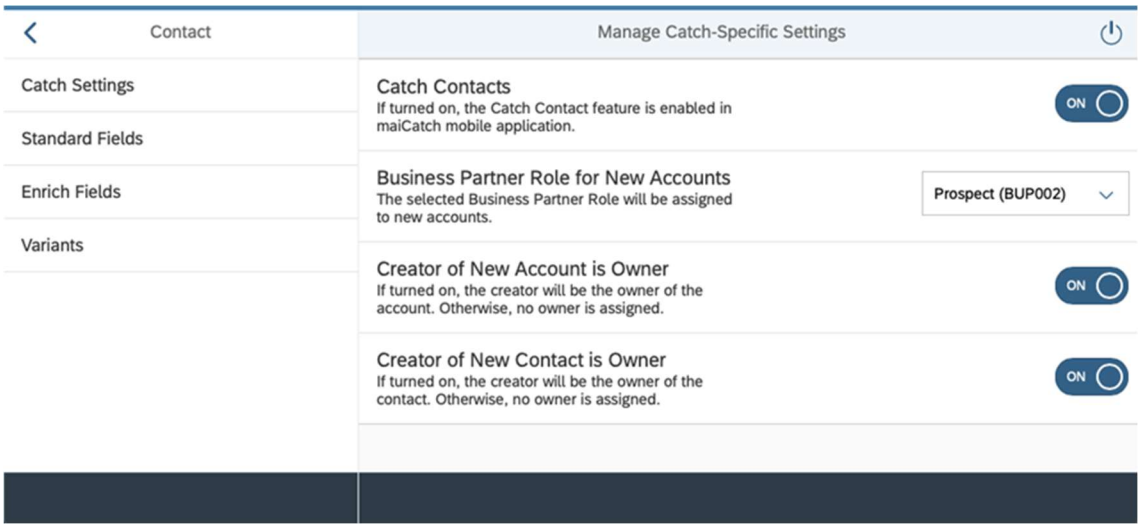


Figure 19: Catch Contact - Catch Settings

**Business Partner Role for New Accounts**

Select the business partner role which is used when you create a new account through maiCatch. The default role is Prospect (BUP002).

**Creator of New Account is Owner**

maiCatch will automatically add the creator of the account (the logged in user) as owner in the account team. This way the user will find prospects in the “My Accounts” search of SAP Sales Cloud.

**Creator of New Contact is Owner**

maiCatch will automatically add the creator of the contact (the logged in user) as owner in the contact team. This way the user will find contacts in the “My Contacts” search of SAP Sales Cloud.

**Catch Lead**

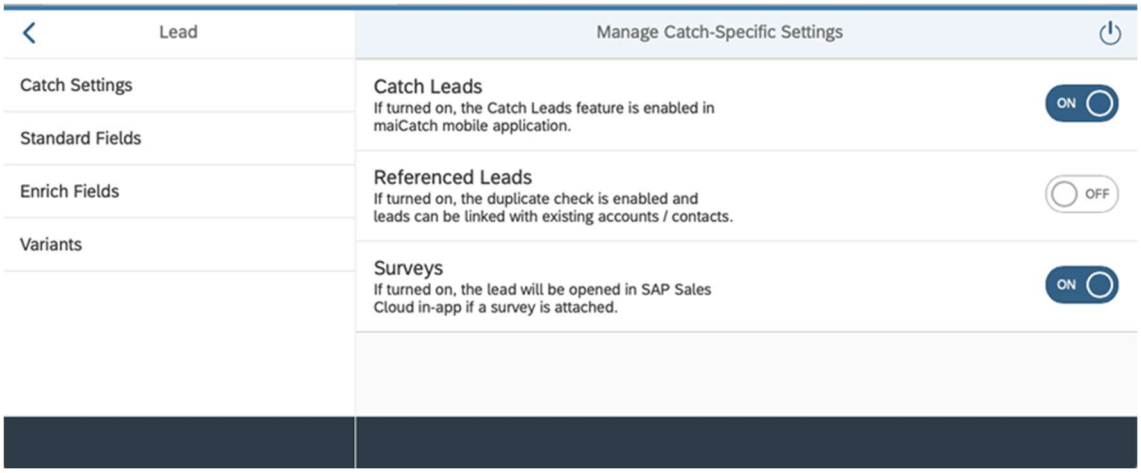


Figure 20: Catch Lead - Catch Settings

**Referenced Leads**

You have the option to create a lead without and with a reference to an existing contact and / or account. If it is enabled, you will be able to use the duplicate and account search to create the reference.

**Surveys**

If you use surveys as part of your lead process you can directly fill out the survey after catching a lead.

You have to configure:

- Activity Plan,
- Routing Rule for Surveys
- Workflow Rule which executes the Activity Plan when creating a lead

to add the survey to the lead in SAP Sales Cloud.

If you activate the “Survey” feature in the admin cockpit, after the lead is created we will open the lead, in an in-app browser, in case a survey is attached.

If activated surveys can be used at the moment only when online.

### 4.1.3 Standard Fields

The first thing a user can edit after starting a catch are a set of standard fields. The set of standard fields can be different for every catch. Some of these fields are mandatory to fill to be able to proceed to the next step – Enrich.

We allow customers to define additional mandatory fields beyond our standard configuration. This way you can setup maiCatch to fit the configuration of the SAP Sales Cloud quick create masks.

The fields in the admin application are grouped the same way as they are in the mobile application.

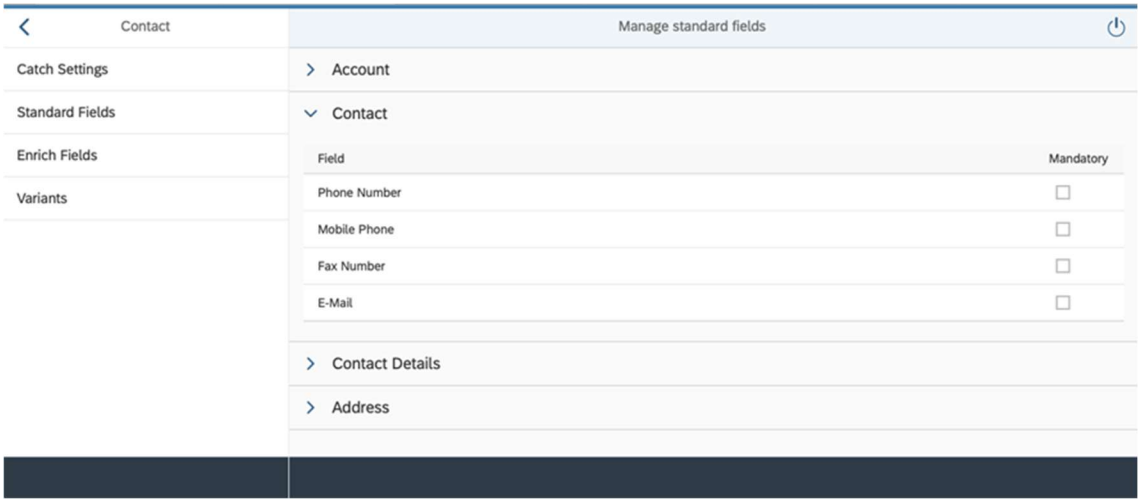


Figure 21: Manage standard fields

In the screenshot above you see that we have defined the e-mail as a mandatory field.

Fields which are mandatory by default cannot be changed. We tried to minimize the number of mandatory fields to the level which is the absolute minimum. These fields are mandatory in every SAP Sales Cloud system.

### 4.1.4 Enrich Fields

Here you can add fields that should be available in the “Enrich” step of a catch. You can add standard or extension fields. Extension fields need to be available through the c4codataapi service.

You can change the sorting order of fields by drag and drop.

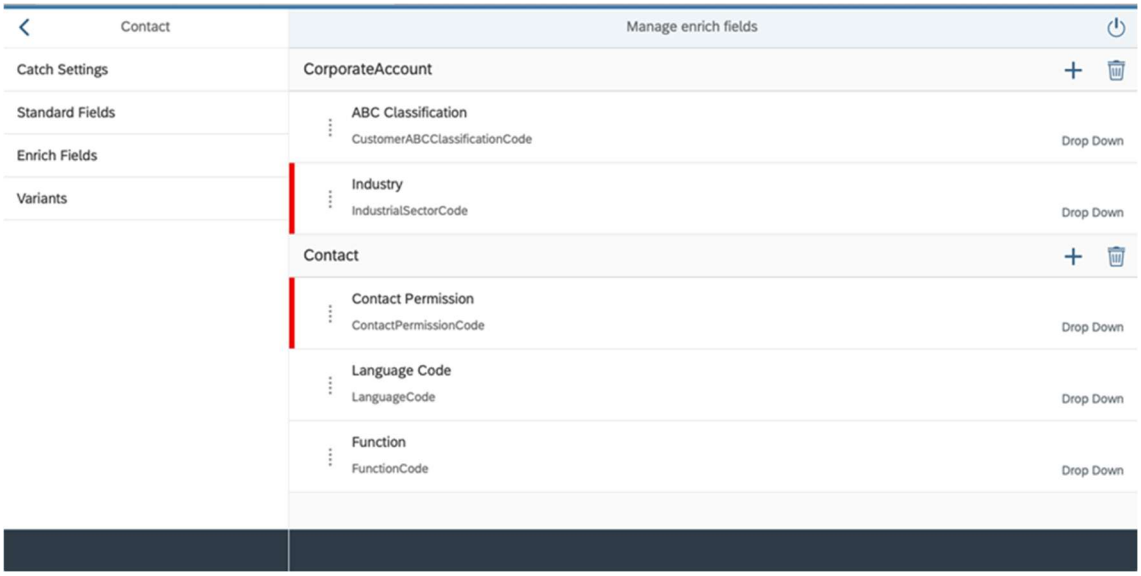


Figure 22: Manage Enrich Fields

When you add an enrich field you have the option to:

- choose from a list of pre-defined fields. SAP Sales Cloud standard fields which are commonly used and would require additional configuration otherwise, or
- define your own field

**Pre-defined Enrich Fields**

Depending on the catch type and related object you can select from a list of pre-defined fields.

Currently we have defined the following fields as pre-defined fields:

| Catch Type | Entity Name | Field Name | Description |
|---|---|---|---|
| Catch Contact | Corporate Account | Account Owner | Employee added to the account team as owner |
| | Contact | Contact Owner UUID | Employee is set as main owner in the contact team. On update an existing owner is overwritten. |
| Catch Lead | Lead | Owner Party ID | Employee is added to the Sales & Marketing Team as Owner. |
| | | Owner Party ID Sales | Employee is added to the Sales & Marketing Team as Sales Employee. |
| | | Sales Organisation ID | Sets Sales Organisation. |
| | | Sales Office ID | Sets Sales Office |
| | | Sales Group ID | Sets Sales Group |

| Catch Type | Entity Name | Field Name | Description |
|---|---|---|---|
| | | Campaign | Active campaigns can be referenced. The lead source is set to Campaign automatically. |
| | Contact | Contact Owner UUID | Employee is set as main owner in the contact team. On update an existing owner is overwritten. |
| Catch Private Contact | Individual Customer | Owner ID | Employee is set as main owner in the account team. On update an existing owner is overwritten. |

You have the possibility to define the enrich field as mandatory. All other parameters are pre-defined and cannot be changed.

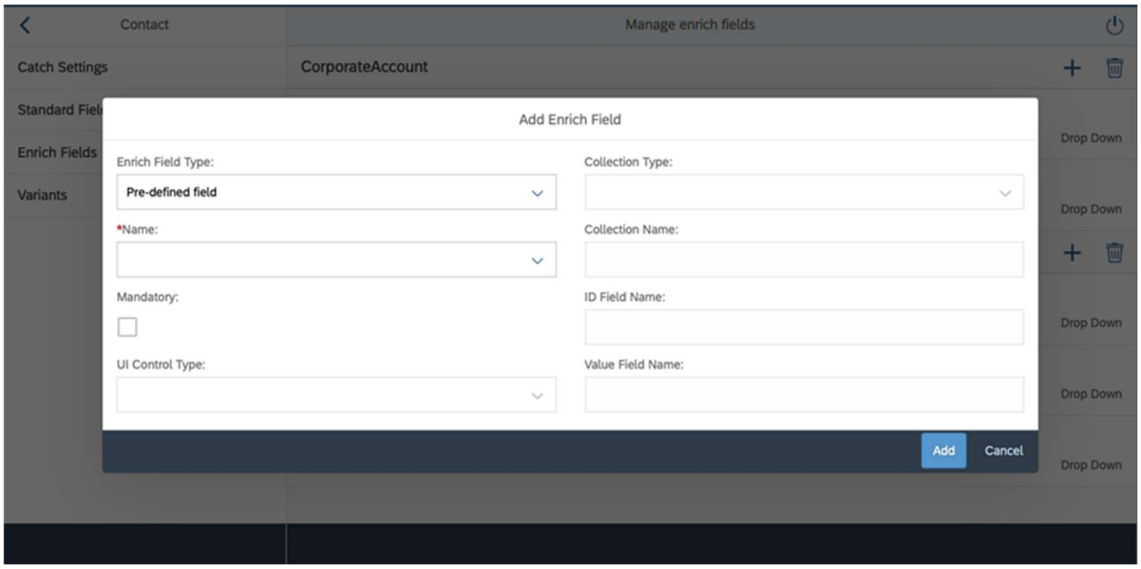


Figure 23: Add pre-defined enrich field

**Customer defined field**

When adding a field, you provide the following details:

- Name: Technical Name in the OData service
- If your user has access to the c4c-odata metadata, we can provide you with search as you type suggestions.
- Mandatory: Define if enrich field is mandatory
- Context Property: if content of field depends on another field and should be filtered. E.g. BusinessAddressStateCode has BusinessAddressCountryCode as context property. This means that the list of states depends on the selected country.
- UI Control Type: Defines how the field is displayed in the app
    - Checkbox (for Boolean fields)
    - Date Picker
    - Decimal Input

- Drop Down (if a code list is available which defines code and description)
- Input Field (search help based on online search)
- Multi-Combo Box
- Multi-Line Text
- Text Field

- Collection Name (In case of input type “Drop Down”, “Multi-Combo Box” or “Input Field”)
  - For “Drop Down” fields you provide a collection with key/description pairs. The user can then choose from the available values based on the configuration of SAP Sales Cloud.
  - For “Input Fields” you have to additionally provide
    - Collection Type: “Searchable” or “Filterable”

      Searchable collections have to accept the $search OData parameter

      Filterable collections have to accept the $filter OData parameter
  - ID Field Name: Name of the field in the collection, which is used as key
  - Value Field Name: Name of the field in the collection, which is used as description
  - Filter Expression (for filterable collection only): OData filter expression needs which is going to be used for the value help. Use the <term> placeholder for user input.

    Example: substringof('<term>', CampaignName) and Status eq '2'

Enrich field examples:

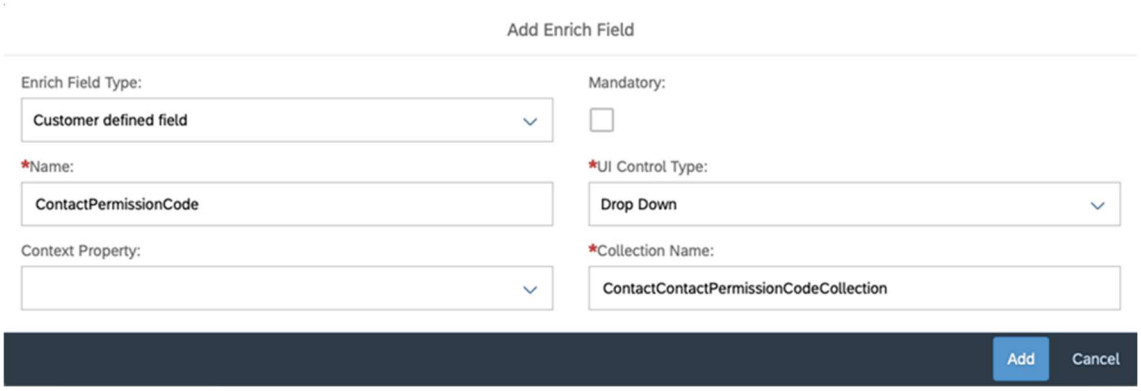


Figure 24: Define Enrich Field - Contact Permission

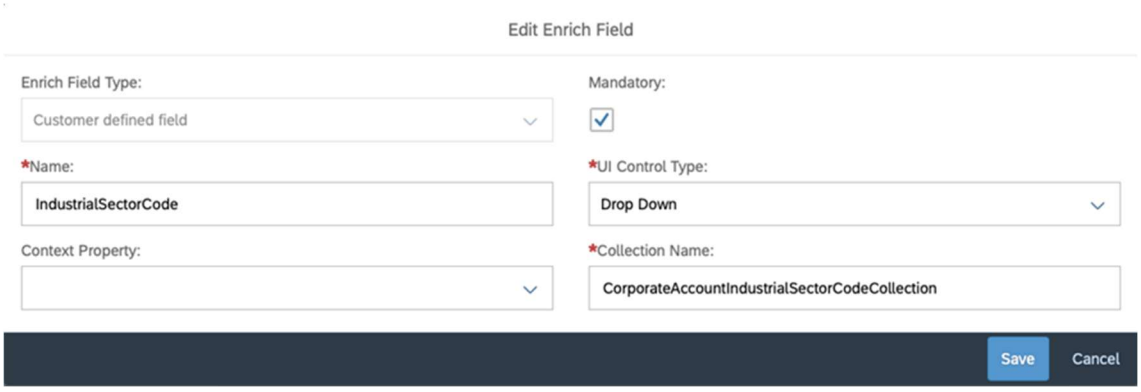


Figure 25: Define Enrich Field - Industrial Sector

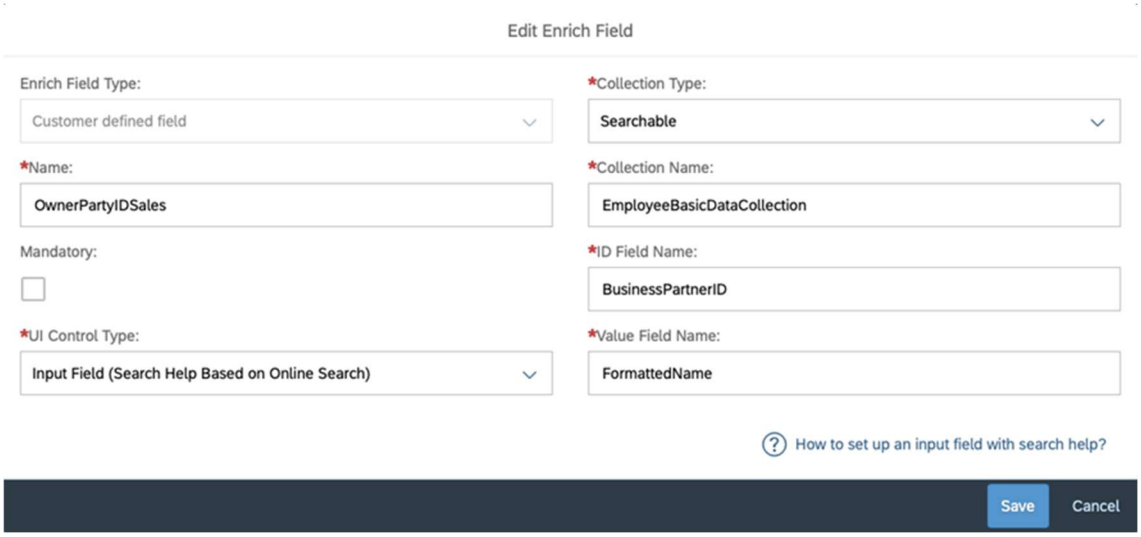


Figure 26: Define Enrich Field - Sales Employee

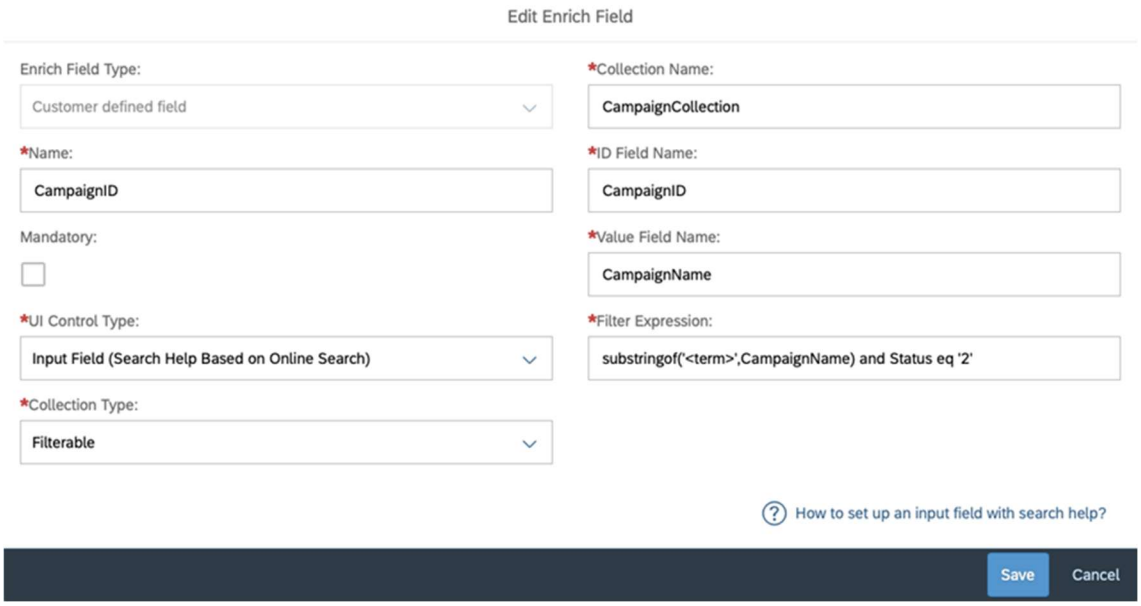


Figure 27: Define Enrich Field – Campain

Please note: Code list values are cached in the maiCatch backend. If changes are made to the code lists in your system, these changes will only become visible in maiCatch after restarting the app on your mobile device and restarting the backend on our side. In such cases, simply contact support at support.cxaddons@nagarro.com.

### 4.1.5 Variants

For each catch you can create a variant which defines default values for the configured enrich fields. One variant can be set as a default variant. Variants can have a validity date. E.g. you can create a variant which is only valid during a trade fair.

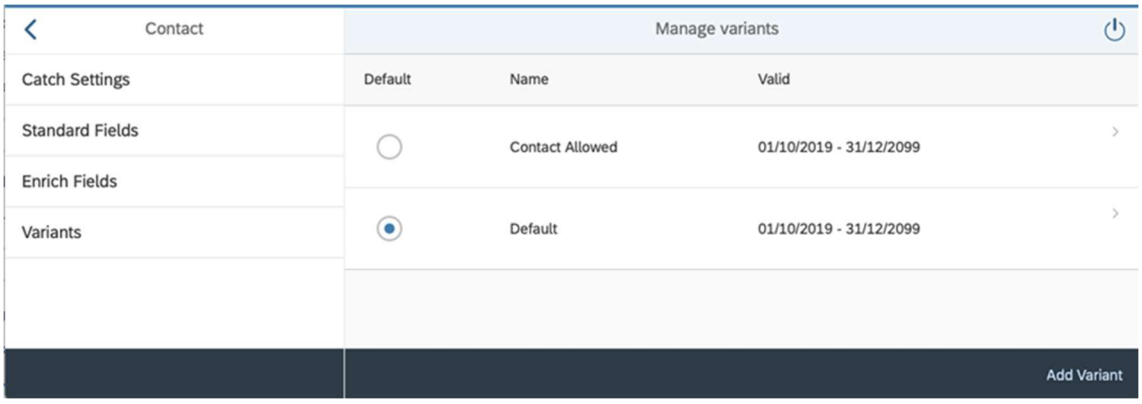


Figure 28: Manage Variants

When creating a variant, you need to define a name and the validity date. The variant will show the configured enrich fields and allows you to define default values for each field. For drop down fields the available values are read from your SAP Sales Cloud system.

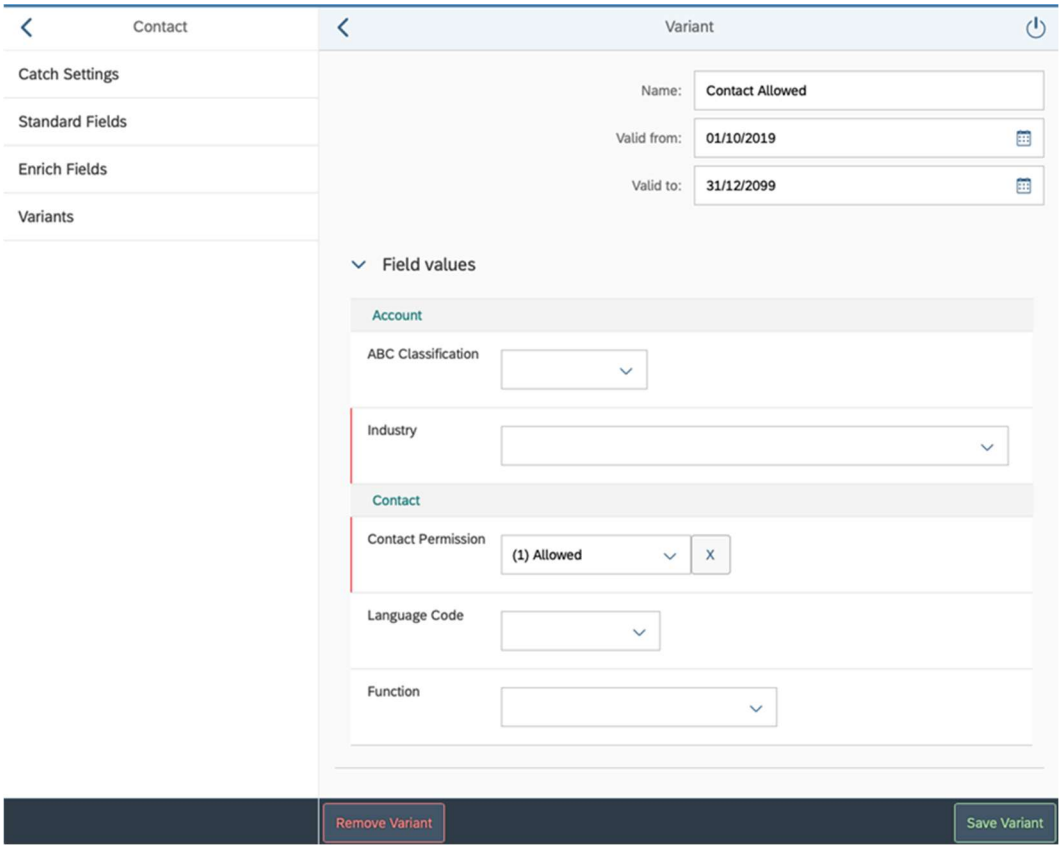


Figure 29: Define Variant

## 4.2 Users

maiCatch registers users automatically after their first login with their name id (as provided by your identity provider) along with the registration date. You can search for the user id or users registered on a certain date. Users can be enabled / disabled by the business administrator. Disabled users are not counted against the available licenses. Users who are disabled receive a message during app start.

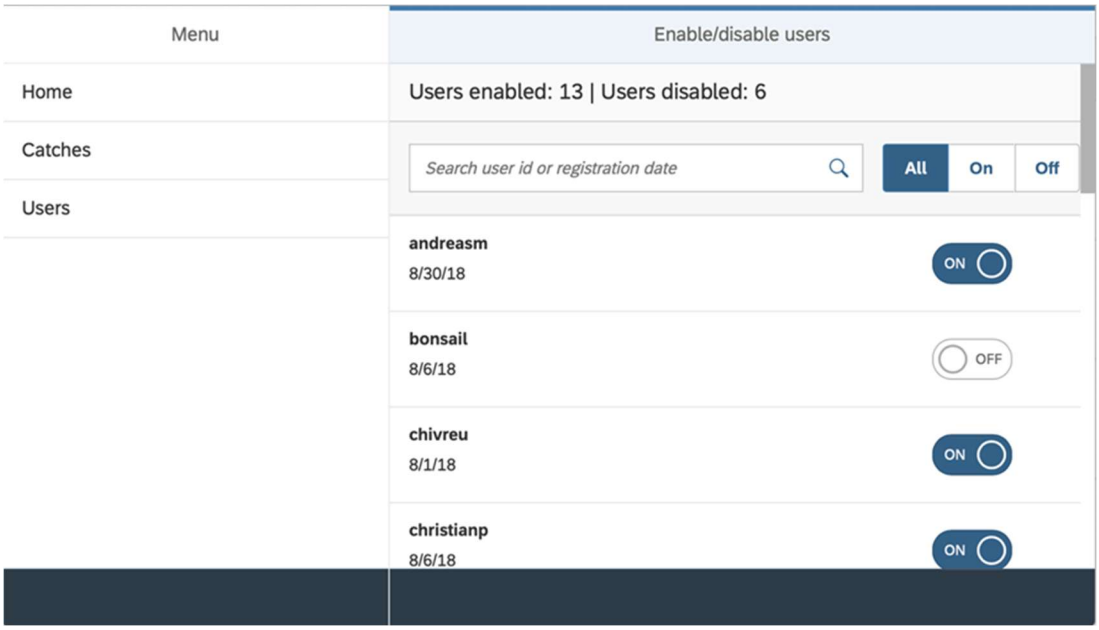


Figure 30: User Management

# 5 SAP Sales / Service Cloud

## 5.1 Configuration

To support certain use cases, we depend on the correct configuration of SAP Sales / Service Cloud. These pre-requisites are documented here and are also linked from within the product description.

### 5.1.1 Attachments

In SAP Sales / Service Cloud you can define the MIME types for attachments and documents that can be uploaded to your system. If this MIME type check is active you have to make sure that the MIME types and file extensions that are used for maiCatch attachments are maintained in your system.

Go to the business configuration of your system and search for the activity “Allowed MIME Types for Document Upload”.

In the “Basic Settings” you can activate the MIME type check.

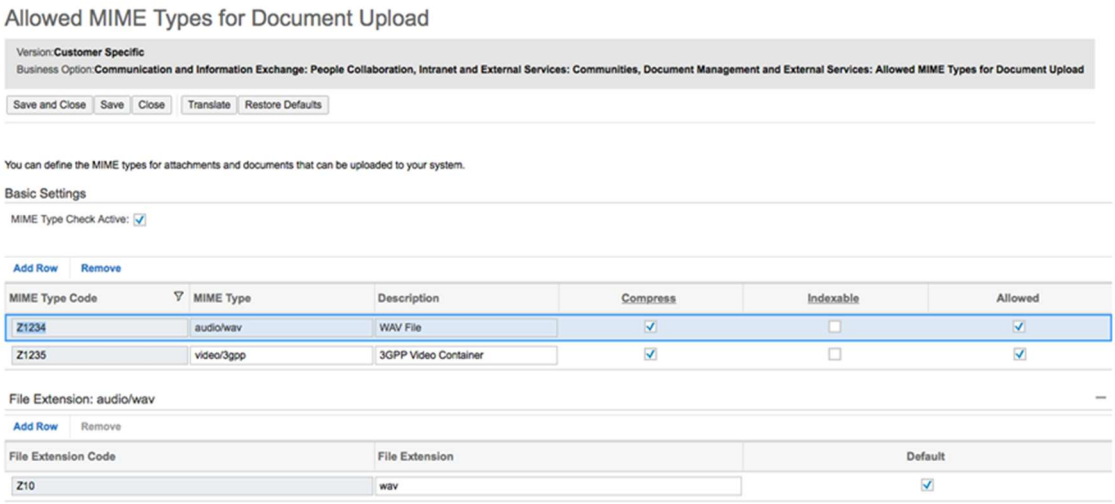


Figure 31: Attachment mime types

Please maintain the following MIME Type Codes and File Extensions to support the upload of

- Audio recordings
- Movie recordings

as part of a catch. The MIME type and extensions used depend on the device where maiCatch is running on. This list will be updated if we discover other types needed.

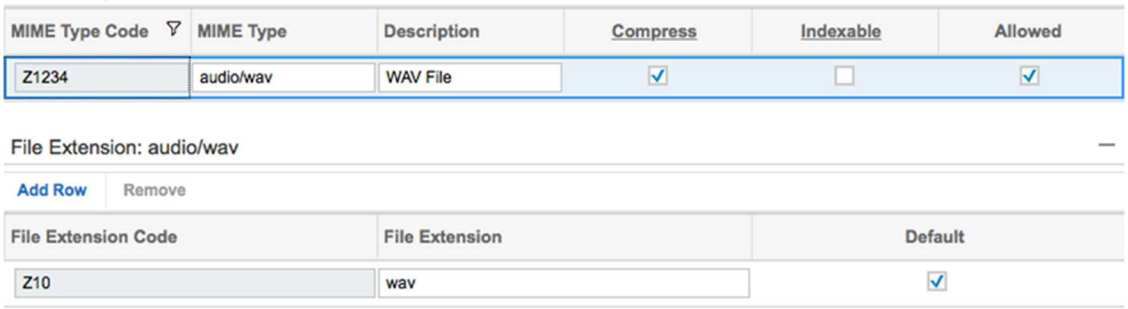


Figure 32: Mime types

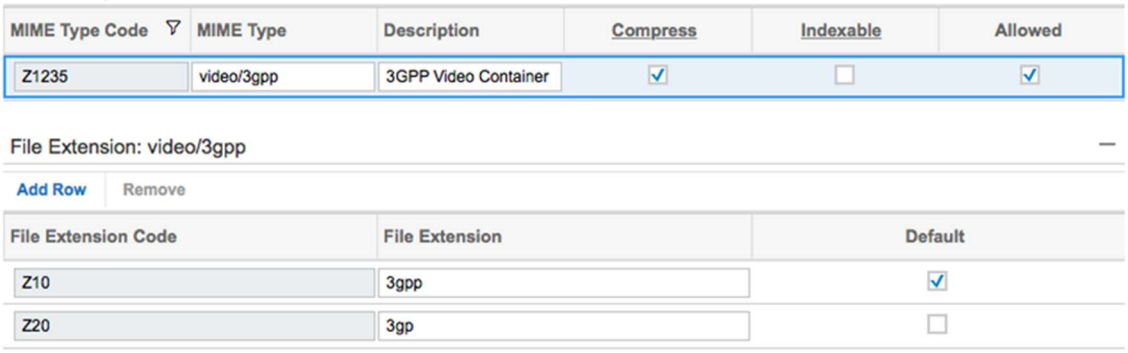


Figure 33: Mime types

### 5.1.2 Academic Titles

maiCatch can extract academic titles from business cards. It tries to match the extracted title with titles maintained in your SAP Sales / Service Cloud. If we cannot match it, the user will find the identified academic title in the unassigned tab.

If you want to extend academic titles in your system go to the business configuration of your system and search for the activity “General Business Partners”. Choose “Maintain Academic Titles” to maintain additional titles.

### 5.1.3 Company Settings

If you use surveys, we suggest that you set “Enable Semi-Collapsed Navigation Menu upon Sign-in” to YES.

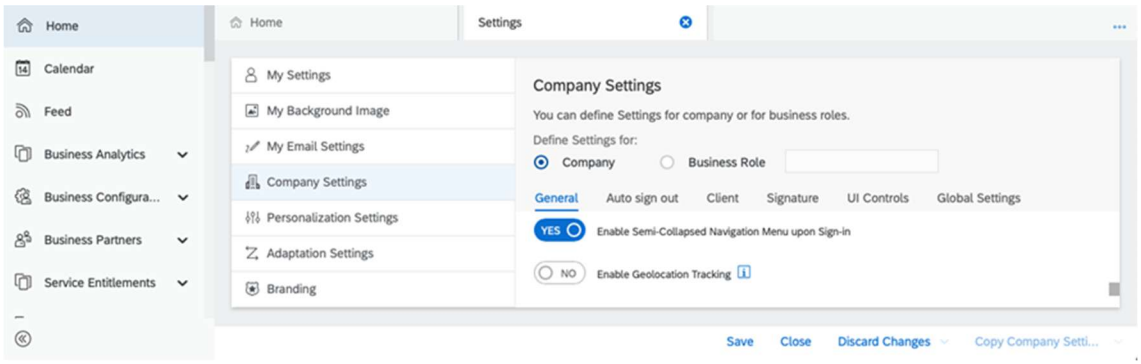


Figure 34: Company Settings - Semi-Collapsed Navigation Menu

## 5.2 Authorizations

maiCatch accesses SAP Sales / Service Cloud with the user’s credentials. Therefore, the user needs the following authorizations in SAP Sales / Service Cloud to be able to work with maiCatch:

| Work Center | Work Center View | Catch Contact | Catch Lead | Catch Private Contact | Owner Assignment |
|---|---|---|---|---|---|
| Customers (CODACCOUNTWC) | Accounts (CODACCOUNTWCV) | X | X | | |
| | Contacts (COD_CONACT_WCV) | X | X | | |
| | Individual Customers (COD_SEOD_ACCOUNTWL_WCVIEW) | | | X | |
| Sales (COD_SALES_WCF) | Leads (COD_MKT_PROSPECTWC) | | X | | |
| People (CODPEOPLE) | Employees (COD_EMPLOYEES) | | | | X |
| Organizational Management (MOM_ORGANIZATIONALMANAGEMENT) | Org Structures (MOM_ORGSTRUCTURES) | X | X | | |

# 6 Performance optimization

maiCatch is fully integrated with SAP Sales Cloud and therefore loads codelists into the app. In order to improve the data transfer with SAP Sales Cloud the application can cache data and reuse it. This can be done by adding a destination called **c4c-odata-com** to the the java backend with basic authentication. To configure this we need the url of you SAPsystem and valid credentials.

# 7 Troubleshooting

## 7.1 App

### 6.1.1 The installed version *x.y* is not supported anymore. Please update.

We are working hard to deliver new features and try to still support older app versions. But from time to time we would like you to update to the latest and greatest maiCatch version. If your app version is not compatible anymore, we will ask you to update first.

Follow the update link to the App Store or Google Play to download the latest version of maiCatch before you continue.

Our goal is to support the previous major app version. This means when we release a new version you can continue to use the previous version. This way we avoid forcing you to update immediately after we release a new version. It gives you usually a month to update until we release the next major version.

### 7.1.1 No user found in C4C with alias “userid” (format: unspecified)

This usually means that the user id, which was provided by your company’s identity provider to mai-Catch, could not be matched with a valid SAP Sales Cloud user id.

Make sure that the user with this id exists in SAP Sales Cloud and try again. It might be necessary to logout and re-login in maiCatch from the Settings screen.

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