

SAP BUSINESS TECHNOLOGY PLATFORM | EXTERNAL

## End User Guide

# Manage Credit Block on Sales Order with SAP Build Process Automation or SAP Workflow Management

# Table of Contents

Table of Contents .....	2
Overview .....	3
My Inbox Task .....	4
Approve or Reject Credit Block on a Sales Order .....	4
No Approvers determined for Sales order credit block approval .....	6
Process Visibility Workspace.....	8
Access Process Workspace with SAP Build Process Automation.....	8
Access Process Workspace with SAP Workflow Management .....	8

# Overview

This document provides information about how to use the Manage Credit Block on Sales Order using SAP Build Process Automation or SAP Workflow Management. Credit managers, Finance Analyst & other approvers are the target users of this document.

Manage Credit Block on Sales Order enable customers to automate the approval of Sales Orders which are Credit Blocked in a flexible and transparent way. It provides flexibility in choosing process variants depending on attributes like customer group, sales organization, order amount, currency etc. When a sales order is approved in SAP S/4HANA (on-premise or cloud) and is automatically blocked for credit, a pre-configured process variant is triggered in SAP Build Process Automation or SAP Workflow Management based on configurable business conditions.

- Credit Blocked Sales Order is validated using Business Rules before sent for approval.
- Configure multi-level approval based on various parameters like order type, sales organization, order amount, currency, SD document reason, sold-to-party, etc.
- Approvers are determined using a configurable business rule or external service.
- Approvers are automatically notified via email about the task assignment.
- Approvers have two decision options (Approve and Reject) and based on the decision, the credit block on the sales order shall be either released or rejected in SAP S/4HANA (on-premise or cloud).

# My Inbox Task

The Manage Credit Block on Sales Order application enables the credit controllers to view the approval tasks in My Inbox for sales orders that are blocked for credit. They could also make a decision to Approve or Reject the credit block for the specific sales order in SAP S/4HANA or SAP S/4HANA Cloud.

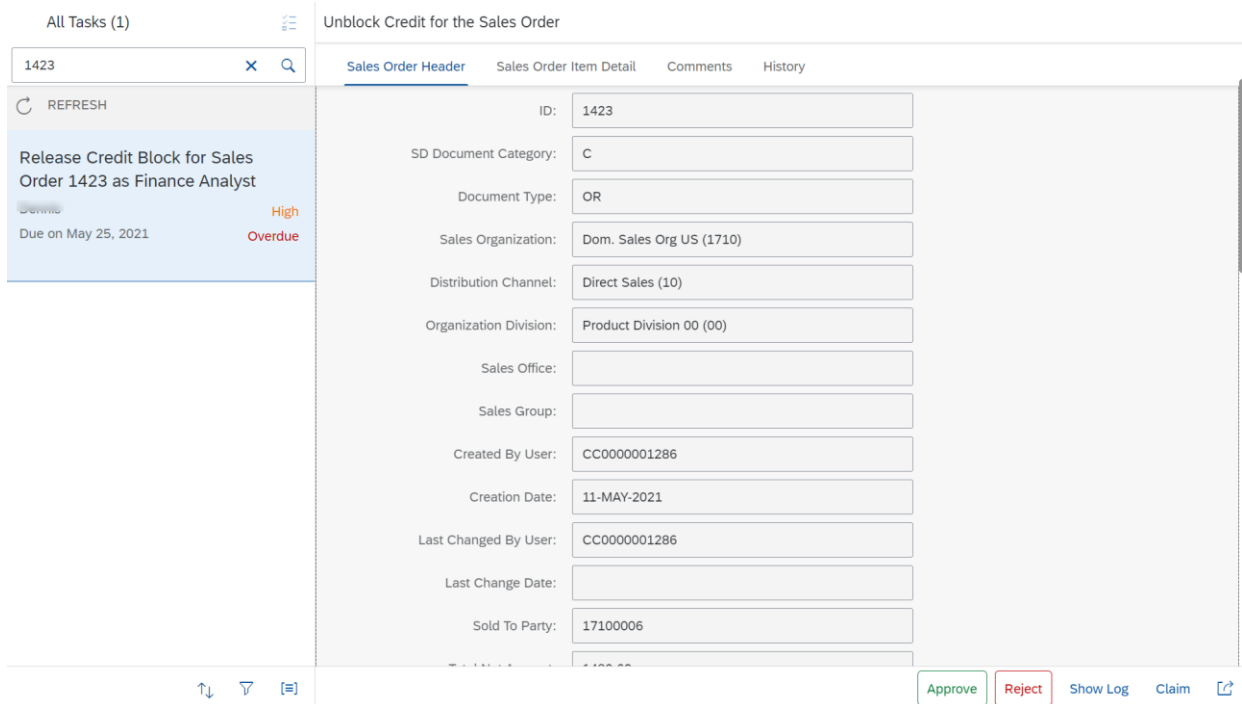
## Approve or Reject Credit Block on a Sales Order

“My Inbox” application enables line of business users to claim and complete their task. Please go through [SAP My Inbox documentation](#) for more details.

When the automatic credit check blocks the sales order and the sales order is approved, a task is automatically created and available in the My Inbox application. The approver will also get an email notification about the credit blocked sales order.

The approval user interface to release or reject a credit block on a sales order has four sections.

1. Sales Order Header – Header information of Sales Order.



## 2. Sales Order Items – Item level details of Sales Order

All Tasks (1) 1423 REFRESH

**Release Credit Block for Sales Order 1423 as Finance Analyst**  
 Due on May 25, 2021 High Overdue

Unblock Credit for the Sales Order

Sales Order Header **Sales Order Item Detail** Comments History

Item	Product	Quantity	Item Category	Overall Status	Net Amount
10	Trad.Good 11,PD,Reg.Trading	30 PC	TAN	Not yet processed(A)	515.44 USD
20	Trad.Good 12,Reorder Point,Reg.Trad.	50 PC	TAN	Not yet processed(A)	965.25 USD

Comments

Comments:

History

Approve Reject Show Log Claim 🔗

## 3. Comments – to capture comments from Approvers

## 4. History – to view the record of the previous approval levels with comments, if any.

All Tasks (1) 1423 REFRESH

**Release Credit Block for Sales Order 1423 as Finance Analyst**  
 Due on May 25, 2021 High Overdue

Unblock Credit for the Sales Order

Sales Order Header Sales Order Item Detail **Comments** History

Comments:

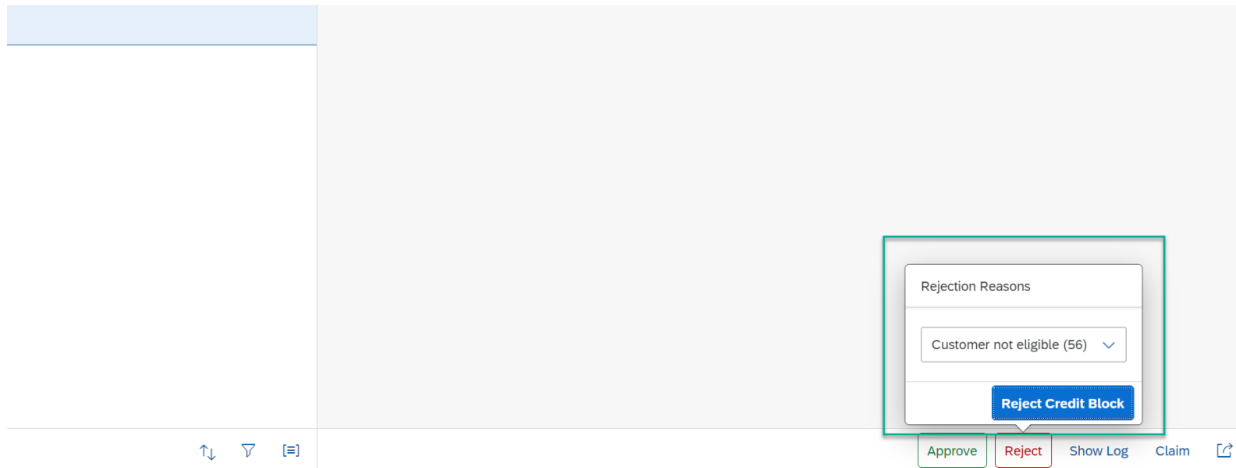
History

User	Role	Action	Comment
[User]	Credit Manager	Approved	looks good

Approve Reject Show Log Claim 🔗

The Approver can make one of the following decisions:

1. Approve - Click **Approve** to complete the approval level to Release the Credit Block in SAP S/4HANA.
2. Reject – To reject the request, click **Reject** button and select one of the valid rejection reasons from the popup. Then click **Reject Credit Block** button to Reject the Credit Block set on the specific sales order.



## No Approvers determined for Sales order credit block approval

- In case no approvers are determined, Process administrator is determined using a configurable business rule and automatically notified via email about the user task assignment to assign approvers or fix the business rule or external service to determine the approvers and then retry again.

All Tasks (438)

Search

REFRESH

Task Owner is not defined for Sales Order 1956 at step Credit...  
High  
Due on Aug 17, 2021 Overdue

Task Owner is not defined for Sales Order 1953 for Update...  
High

Task Owner is not defined for Sales Order 1952 at step Credit...  
High

Task Owner is not defined for Sales Order 1951 at step Credit...  
High

IT Support – Approver Assignment

Task Owner is not defined for Sales Order 1956 at step Credit Manager

Error Description Task Owner Assignment History Comments SalesOrder

Error Description: Task Owner is not defined for Sales Order 1956 at step Credit Manager for Release Credit Block approval

Task Owner Assignment

Users: comma-separated list of approver user IDs

Email: comma-separated list of approver email addresses

Groups: comma-separated list of approver group IDs

History

History

# Process Visibility Workspace

Process Visibility capability in SAP Workflow Management or SAP Build Process Automation enables Process Owners and Process Operators to gain real time visibility on processes and key process performance indicators. It also enables customers gain out of the box process visibility into their deployed processes. Please refer [help documentation](#) for more details.

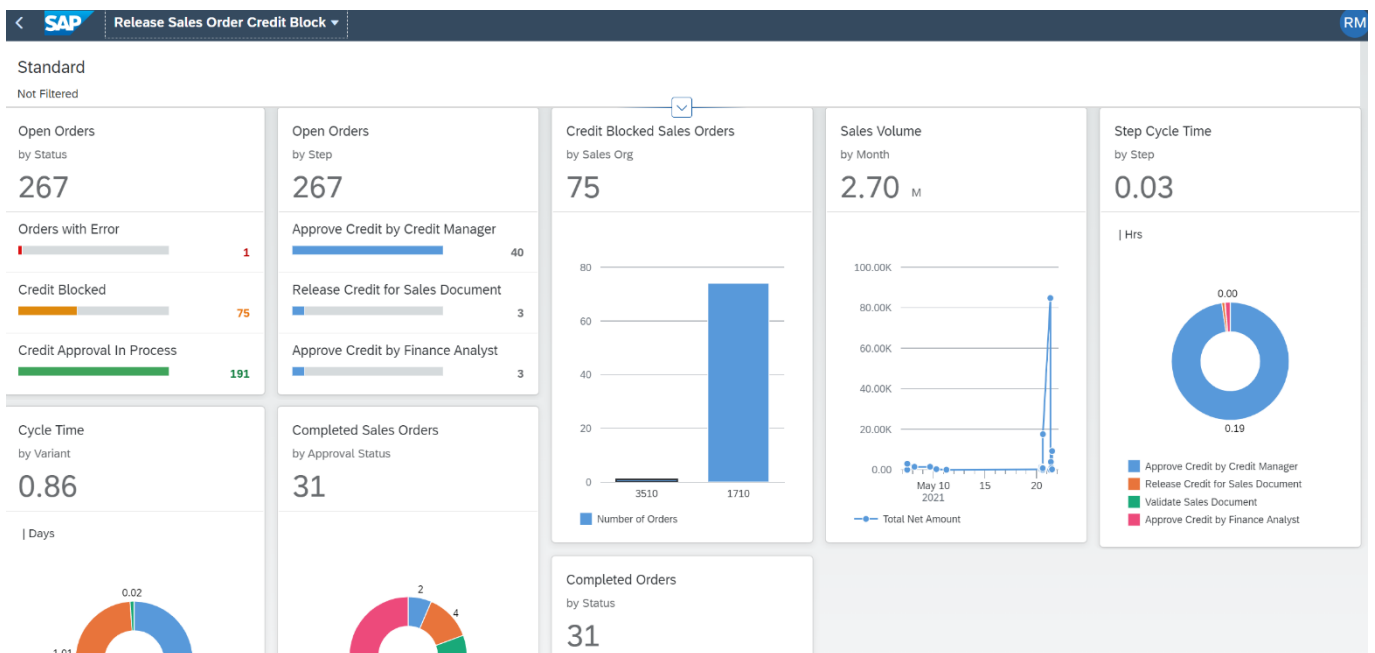
The “Manage Credit Block on Sales Order” workflow package provide out of the box visibility to process performance indicators for all the deployed process variants in SAP Workflow Management or SAP Build Process Automation. A process owner or line of business expert will be able to enhance the visibility scenario.

## Access Process Workspace with SAP Build Process Automation

1. The administrator would have added a tile in the central Fiori Launchpad that corresponds to the scenario “Manage Credit Block on Sales Order”. For more information on how to add scenario-specific tiles, refer to the [help documentation](#).
2. Click the scenario-specific tile in the Fiori Launchpad.
3. User will see the below detailed process visibility dashboard.

## Access Process Workspace with SAP Workflow Management

1. Go to Process Flexibility Cockpit.
2. Select Manage Credit Block on Sales Order tile.
3. Click Live Process Insights Release Sales Order Credit Block
4. User will see the below detailed process visibility screen.





Please go through [help documentation](#) on how to access process workspace.