

SAP BUSINESS TECHNOLOGY PLATFORM | EXTERNAL

End User Guide

Manage Sales Quotations using SAP Build Process Automation or SAP Workflow Management

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Overview

This document provides information about how to use the user interfaces of Manage Sales Quotations Approval Process. Approvers, Requestors and Process Operators are the target users of the user interfaces explained in this document.

Manage Sales Quotations Approval Process content package for SAP S/4HANA enables to automate sales quotation creation in a flexible and transparent way. It provides flexibility in executing a specific variant of the process depending on attributes like net amount and transaction currency etc. When a user submits a request to create a new sales quotation in SAP S/4HANA system, a pre-configured process variant is triggered in SAP Build Process Automation or SAP Workflow Management based on configurable business conditions. On approval, a sales quotation is released in SAP S/4HANA system.

Salient features of this content package are mentioned below:

- Plug and Play with SAP S/4HANA without any additional development
- Process steps delivered to approve a sales quotation
- Automatic email notification to parties involved
- Business Rules provides flexibility in determining approvers strategy i.e., to have approval from external system or Business Rules and determining approvers
- Business Rules for Business Validation of Sales Quotation to cater to specific business requirements and validations
- New variant of the process can be created using the pre-delivered process steps in a no-code / low-code approach
- Out-of-the-box visibility into key process performance indicators

Pre-requisites

1. Sales Quotation must be created in SAP S/4HANA or SAP S/4HANA Cloud
2. Sales Quotation lifecycle events are pushed from SAP S/4HANA or SAP S/4HANA Cloud to Business Technology Platform through the Event Mesh configuration
3. SAP Integration Suite to push Sales Quotation lifecycle events to SAP Workflow Management.

Manage Sales Quotations Approvals

The Manage Sales Quotations workflow content enables the business user to view the Sales Quotations which are configured for external approvals and make a decision to Approve or Reject the Sales Quotation which in turn will Release or Reject it in SAP S/4HANA or SAP S/4HANA Cloud

Approve/Reject Sales Quotation

Once a sales quotation that requires 'External Approval' is created in SAP S/4HANA system, based on the business configuration (such as net value of the Sales Quotation), a process variant will be triggered, and users will receive tasks in My Inbox application.

My Inbox Tasks

The My Inbox application enables line of business users to claim and complete their task. Please check the [documentation for My Inbox](#) for more details.

The recipient is determined by a business rule. The task can either be approved or rejected.

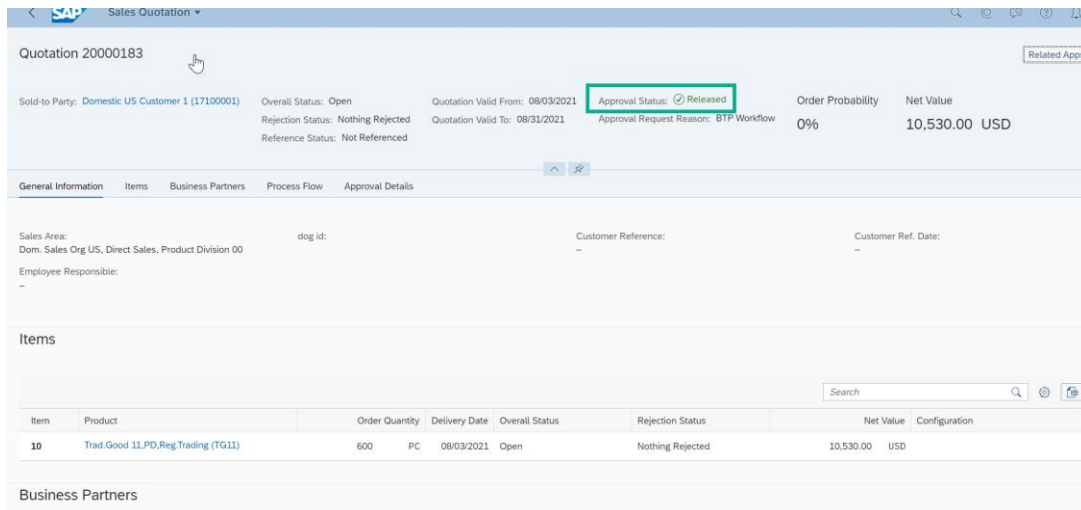
The Approval User Interface has four sections.

1. Sales Quotation Header – Header details of Sales Quotation
2. Sales Quotation Items – Item level details of Sales Quotation
3. History – Record of the previous approvals, if any.
4. Comments - Comments from Approvers

A Comment must mandatorily be provided before approving or rejecting the. The next step is triggered based on how the process variant is configured by the Process Expert.

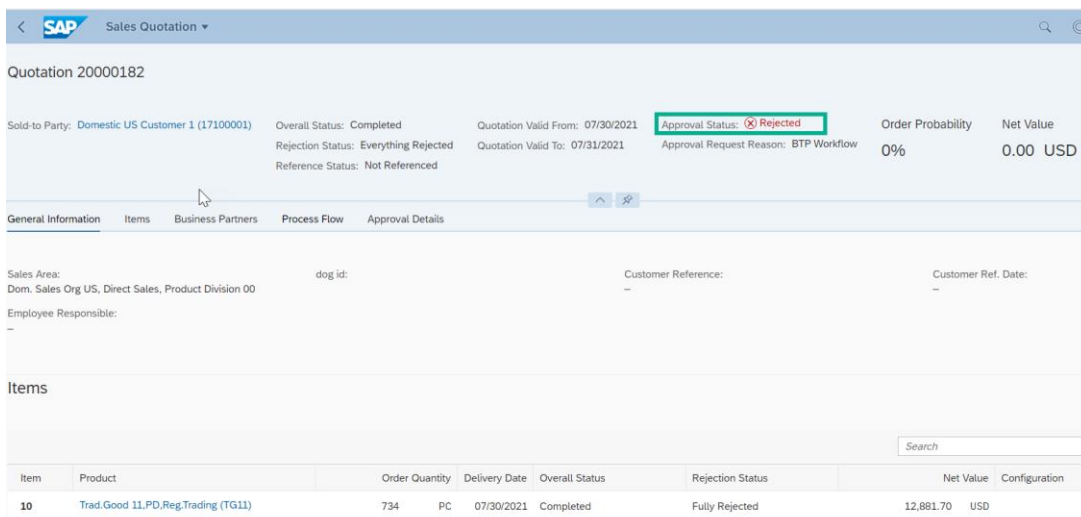
Approval

When a Sales Quotation is approved, it is released for further processing in the S/4HANA system. The approval status will show 'Released' as the status of the Sales Quotation



Rejection

If rejected, then the Sales Quotation Approval Status is updated as **Rejected** in S4HANA system



Process Admin Flow

If by any case, the approvers do not get determined, then the issue will be brought to the notice of the process administrator and task shall be created for the process admin with option to either 'Assign Processor' or 'Retry'.

Assign Processor: This option is to assign the users and/or groups and the email addresses in the section 'Task Owner Assignment', (Note: email address(es) is must to be given), followed by comment and click 'Assign Processor'. The assigned processors will receive the approval task which can be accessed from the My Inbox application.

Retry: This option implies that the process admin can first fix the issue in the business rule and then access this task again in the My Inbox, enter comment and click Retry. If the issue is fixed correctly, then upon retry the normal approval flow will resume.

The screenshot displays the SAP My Inbox interface. On the left, a list of tasks is shown, with one task highlighted in a blue box: "Task Owner not defined for Sales Quotation 20000208" with a priority of "Medium".

The main view shows the details for the task "IT Support-Task Owner Assignment". The task title is "Task Owner not defined for Sales Quotation 20000208". It was created on August 9, 2021, by user "sb-clone-4aa4cc07-abc4-4715-9e0b-d8bb4061ca0b12848@workflorw2746". The priority is "Medium".

The "Error Description" section contains the text: "Task Owners not defined for Local Manager approval step for Sales Quotation request 20000208".

The "Task Owner Assignment" section is highlighted with a green box and contains three input fields for "Users", "Groups", and "Email", each with a placeholder text: "comma-separated list of approver user IDs", "comma-separated list of approver group IDs", and "comma-separated list of approver email addresses" respectively.

The "History" section is currently empty.

The "Previous Processor Details" section shows a table with columns "Processor", "Decision", and "Comments". The table is empty with the message "No items available."

The "Comments" section has a text input field with the placeholder "Enter comments to proceed".

The "Sales Quotation Header" section is at the bottom and contains a "Retry" button highlighted with a green box, along with "Assign Processor", "Show Log", "Claim", and a refresh icon.

Process Visibility Workspace

Process visibility enable Process Owners and Process Operators to gain real time visibility on processes and key process performance indicators. Process visibility capability enables customers to gain out of the box visibility into their deployed processes. Please refer [help documentation](#) for more details.

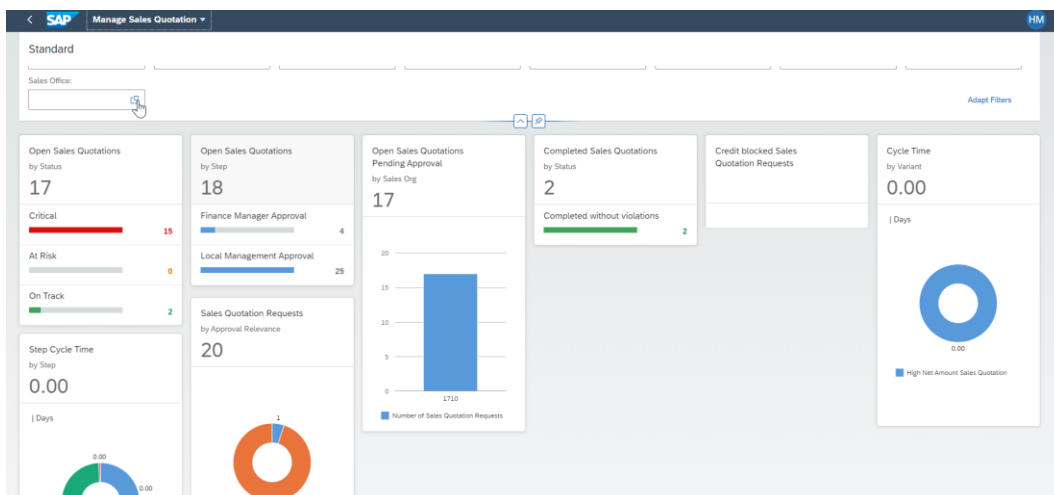
The “Manage Sales Quotations” content package provides such out of the box visibility and process performance indicators for all the active process variants in SAP Build Process Automation or SAP Workflow Management. A process owner or line of business expert can enhance the visibility scenario.

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 Sales Quotation Approval Process”. 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 Sales Quotations
3. Click Live Process Insights – Manage Sales Quotation

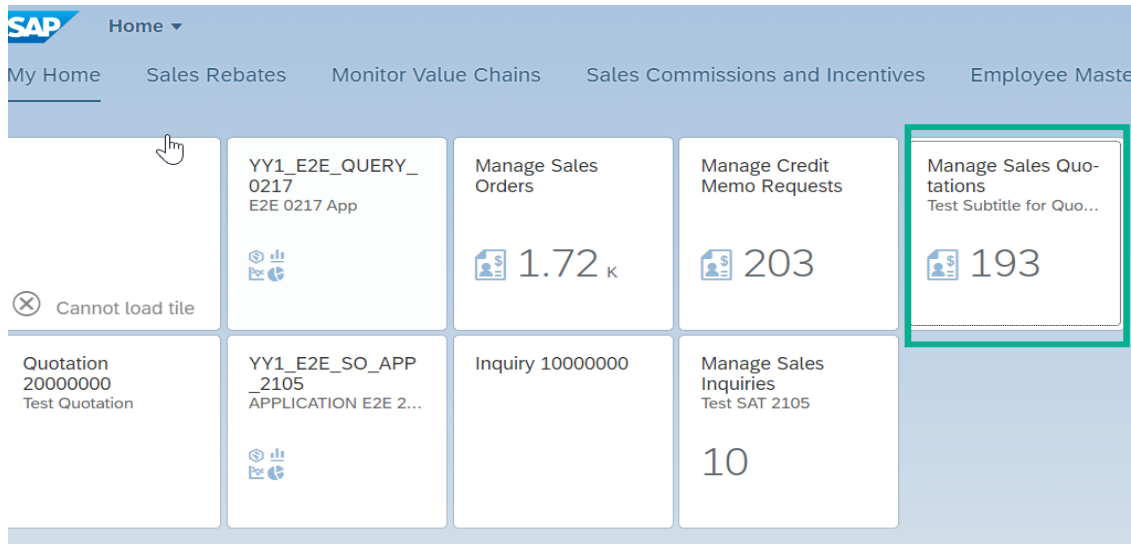


Please go through [help documentation](#) to know about process workspace.

Appendix

Sales Quotation Creation

A sales quotation can be created in the Manage Sales Quotations application in the SAP S4HANA Fiori launchpad.



The sample data to create a sales quotation in S4HANA is mentioned below.

Header Label Details

Property	Value	Comment
Sales Quotation Type	QT	
Sales Organization	1710	
Distribution Channel	10	
Division	00	
Sold to party	17100001	
Order Reason	BTP	

Item Label Details:

Property	Value	Comment
Material	TG11	
Order quantity	20 PC	

Email Notification

When the sales quotation is sent for approval, an email notification is sent to the recipients, provided that the correct email ids are maintained in the 'Determine Approvers' policy.

Dear Approver,

The following sales quotation needs to be approved. Kindly respond in "My Inbox" application.

Sales Quotation Details

<i>Sales Quotation</i>	20000010
<i>Sales Quotation Type</i>	QT
<i>Sold To Party</i>	
<i>Sales Area</i>	Dom. Sales Org US (1710), Direct Sales (10), Product Division 00 (00)
<i>Net Values</i>	11319.75 USD
<i>Document Date</i>	11-AUG-2021
<i>Valid From</i>	11-AUG-2021
<i>Valid To</i>	11-AUG-2021
<i>Overall Status</i>	Not yet processed (A)
<i>Sales Organization</i>	1710
<i>Distribution Channel</i>	10
<i>Division</i>	00
<i>Approval Reason</i>	ZBTP
<i>Customer Reference</i>	

Kindly respond in "My Inbox" application.

This is an automatically generated message.