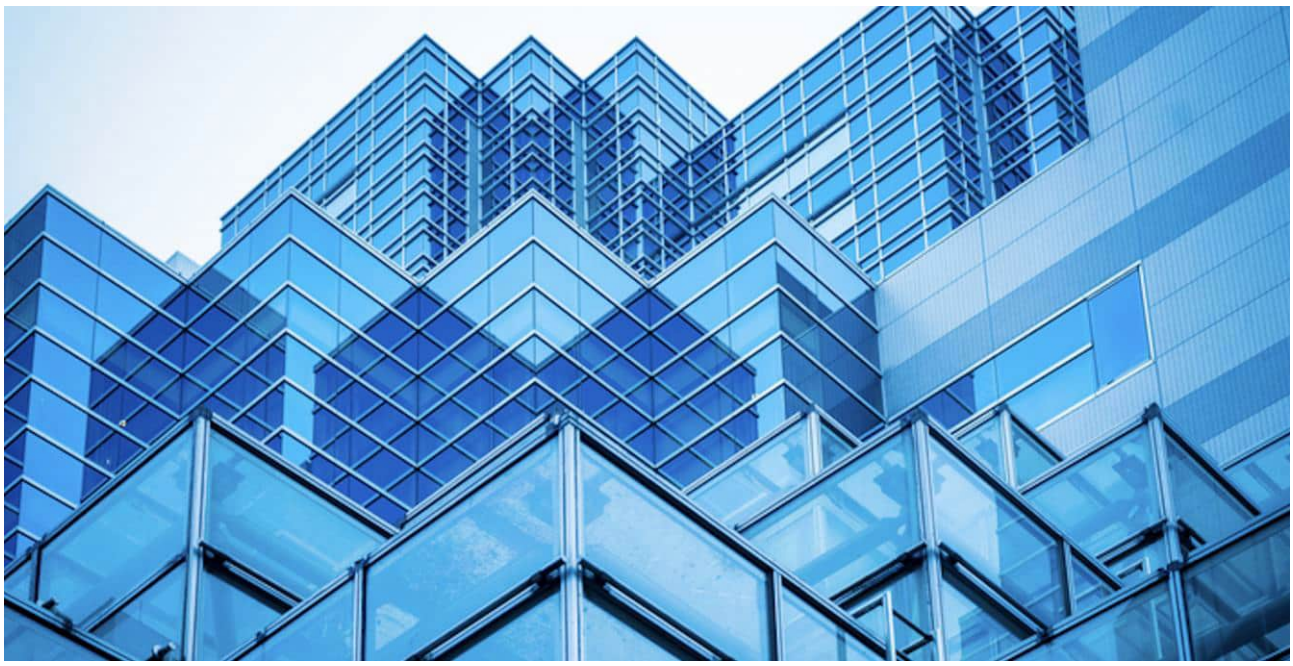


PUBLIC

SAP Build Process Automation

Mass Maintenance of Sales Quotations
Configuration & User Guide

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Change Log

Version	Date	Description
1.0.0	Aug 03th, 2023	Document created

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This document contains 3 sections. Each section cover 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) Import and configure the template using SAP Build Process Automation design studio and (c) SAP Work Zone to access the MyInbox or Task Center and other applications.

3. **User Guide**: This section provide 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.

Note:

- 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 has to be mandatorily followed to import and configure the template.

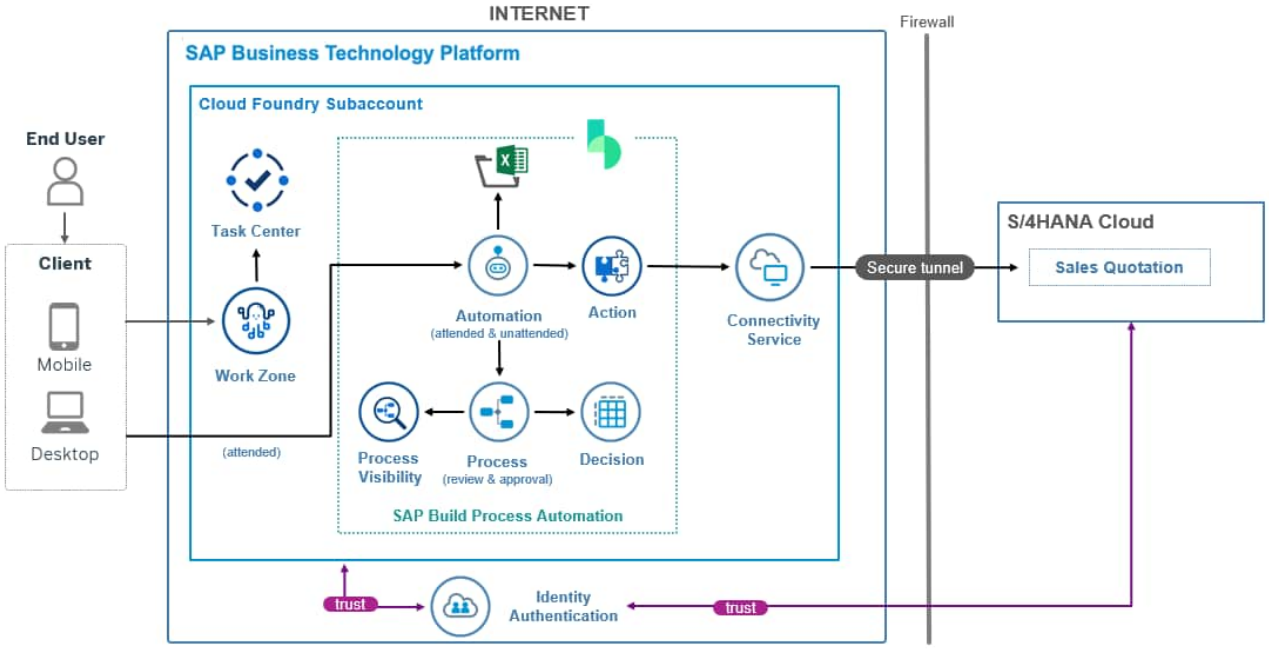
- This template content is to accelerate your solution development. You have to modify this template according to your requirements to achieve the desired business goal. To use this template content, you need to have basic knowledge and understanding of SAP Build Process Automation and its capabilities.

Overview

The Mass Maintenance of Sales Quotations template enables business experts to accelerate the read(from S/4HANA) and creation/update of Sales Quotations in a transparent approach and provide flexibility to meet business requirements. It includes processes, decisions, automations, and visibility scenario content.

This Mass Maintenance of Sales Quotations template automates the read sales quotations from S/4HANA and create/update of sales quotations in SAP S/4HANA. As sales quotation need to be updated or created ad-hoc, on-demand, it is more time-efficient for the users to complete and upload an excel template with the necessary data using a bot, instead of performing it individually in S/4. This template covers the capability to update and create sales quotation in SAP S/4HANA public cloud system.

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The following steps are included as a part of Mass Maintenance of Sales Quotation template:

- This template utilizes SAP S/4HANA Sales Quotation (AX2) API(Check Here) with the help of action project.
- The template has mainly three sections and those are
  - Fetching list of sales quotations from S/4HANA system based on selection file data and update them in input template file.
  - Read emails based on subject and save attachments in specified local folder.
  - Read list of sales quotations from each attachment and send for approvals if required. Once request is approved, finally create or update sales quotation based on request mentioned in attachment.

- **Fetch Sales Quotations from S/4HANA**:

  - A template file is generated with fetched sales quotation records based on the selection screen file input and a file is created in the mentioned save to folder with the naming convention 'S4_SalesQuotations_Output_<TimeStamp> and a log file also is created with the naming convention 'SalesQuotation Log_<TimeStamp>' and an email is sent to the defined user along with the attachments.

- The user must manually update sales quotation in this file and moves it to the 'ToBeProcessed' folder.

- **Read and Create/Update Sales Quotations in S/4HANA:**

  - An automation (**Read Sales Quotations Data From S/4HANA**) to read sales quotations update/create sales quotations from S/4HANA system based on selection file data and update them in input template file. Finally save the resulted file into specified output folder (mentioned in selection screen file).

  - An automation (**Create or Update Sales Quotation**) to update/create sales quotation in S/4HANA runs in a predefined scheduled manner in an unattended/attended mode to fetch the to-be-processed file(s) from the

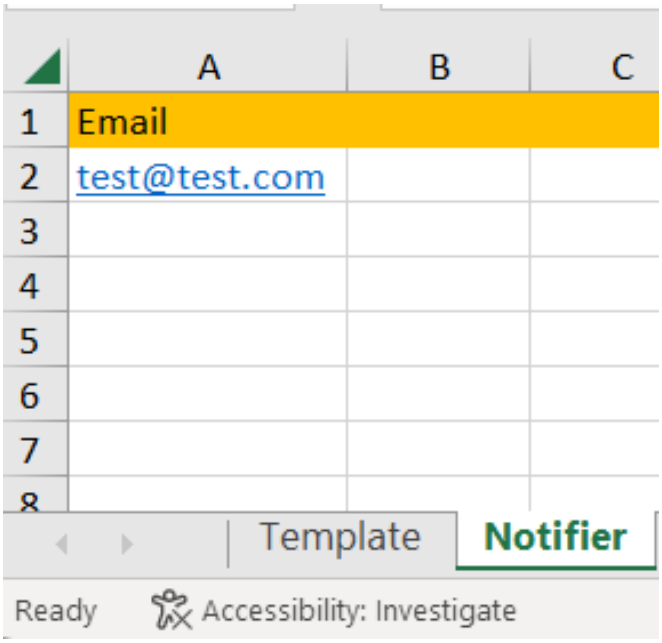
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'ToBeProcessed' folder.

- This automation can handle multiple files in the folder.
- Once the file(s) has been processed and S/4HANA has been updated, it is moved to the 'Processed' folder and renamed to 'Processed_ Sales Quotations_<TimeStamp>' along with a corresponding log file with the naming convention Log Update_<TimeStamp>. These files are also sent as an attachment to a defined user.
- Required templates files are provided in the Templates folder & same files are available with this package.

- **Read emails based on subject:**
  - The template can also work in collaboration with the Business Document Extraction from Email (70U) bot available in the SAP Build Store. The config file attached to 70U content package(70UConfig.xlsx) can be used and placed in the folder as shown in the folder structure mentioned below in the prerequisites section.

Note: In the case of files fetched using the 70U Packge, the input template must be edited to add an additional sheet names 'Notifier' with the email id of the person to be notified in the cell A2.



Prerequisites

The following SAP Business Technology Platform services are required to consume the content package Mass maintenance of Sales Quotations:

- SAP Build Process Automation to orchestrate the process.
- SAP Cloud Identity Services - Identity Authentication
- SAP S/4HANA Cloud
- SAP Business Technology Platform, Cloud Foundry runtime
- SAP Document Management Service to store attachments needed for approvals

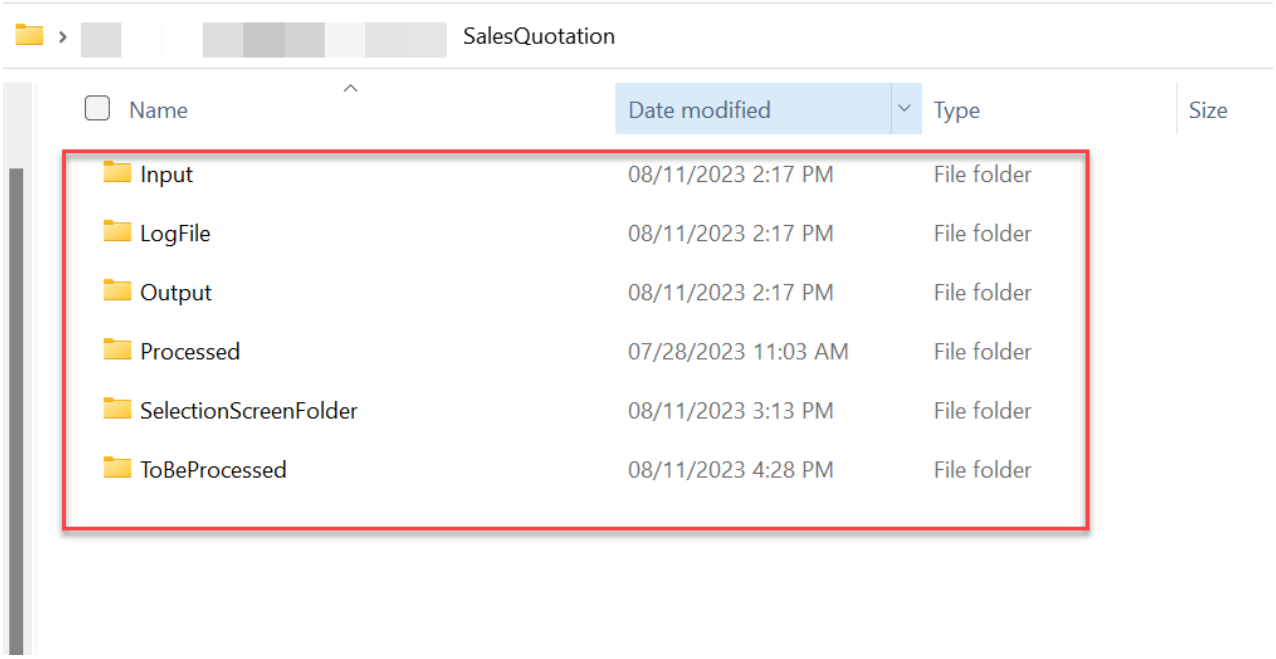
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- SAP Work Zone, standard or advanced edition for accessing My Inbox and Process Visibility workspaces

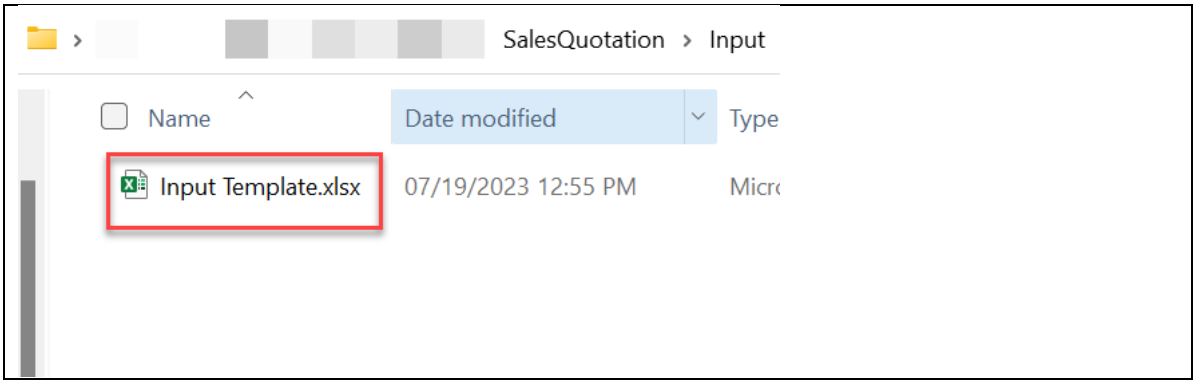
Other Prerequisites

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

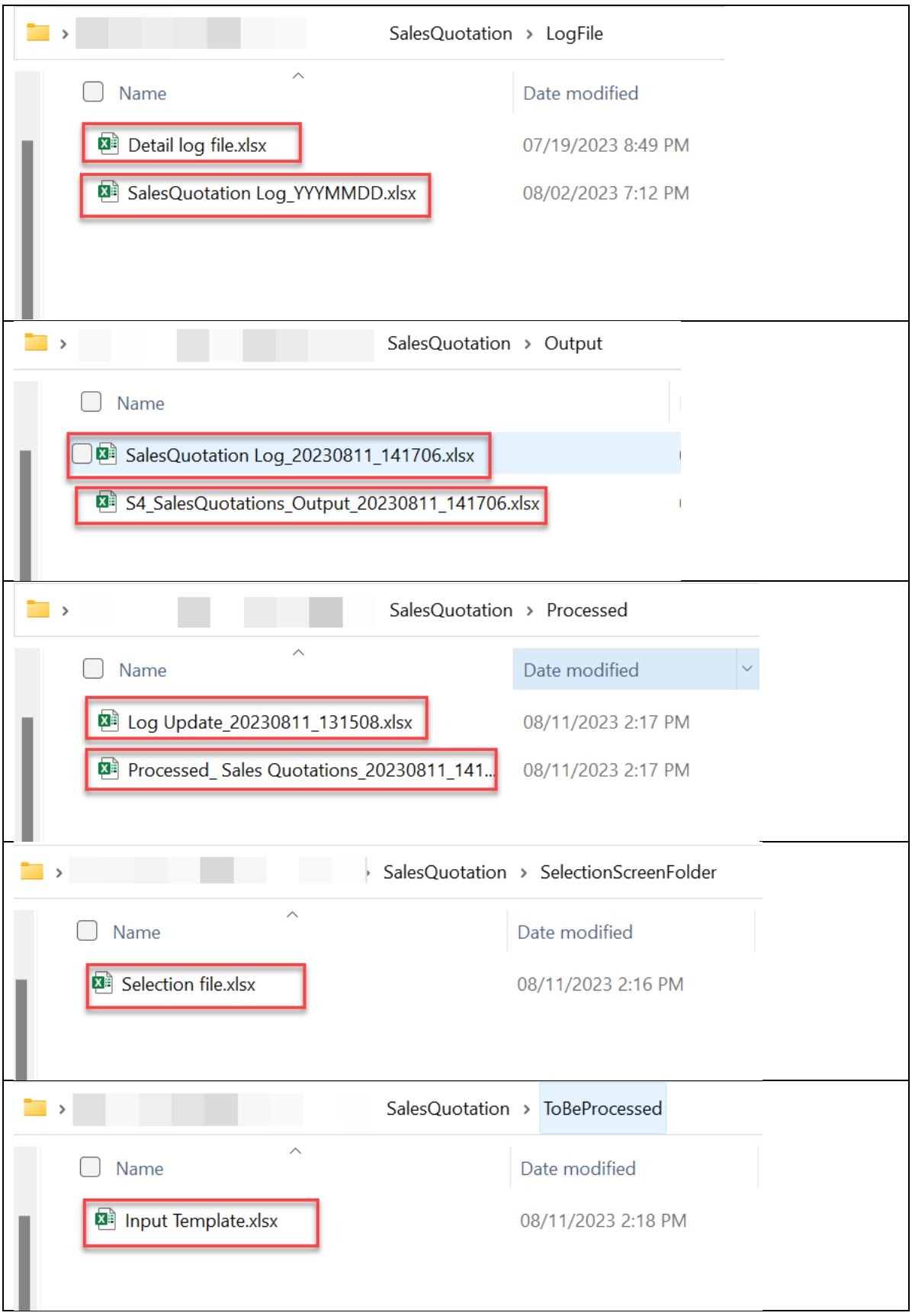
- SAP Desktop Agent 3.17 or higher
- Outlook mailbox configured on the system where the update/create automation will run in unattended mode to send mails with attachments.
- Folder structure as seen below;



- Template files are included in this package and all names are case-sensitive. Please find below folder name with file name.



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Notes:

- This package is designed only to work with the provided folder structure & input template file structures. DONOT CHANGE any column properties and structure.
    - If any changes done in the input template structure, related process & automation implementation also need to be updated to handle those changes**.**
- **Input** folder contains the required Input template file:
    - InputTemplate.xlsx – It contains the input data template with all the required properties and description.
- **SelectionScreenFolder** folder contains the selection screen data with Sales Quotation details.
    - InputSelectionScreen.xlsx – This is used for fetching sales quotation details from S/4HANA system based on given filter values
- **LogFile** folder contains the header and item details count.
    - SalesQuotation Log_YYYYMMDD.xlsx – This is used for keeping record of log details about sales quotation header and items count
- **ToBeProcessed** folder contains the input data file with sales quotation details for creation or update in S/4HANA system.
- **Processed** folder contains the input data files from *ToBeProcessed* folder whose content have been processed completely and have been sent for the approval for creation or update of sales quotations.

Configuration Guide

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.

● Configure SAP S/4HANA Cloud, public edition

To access the S/4HANA system for read,create and update operations, an HTTP destination is required in the SAP BTP account where the SAP Build Process Automation is subscribed. The API used can be found here.

- Create a destination with Basic Authentication.

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- Make sure the communication user has the appropriate communication strategy to edit sales orders assigned to it in the S4HANA system.

Destination with Basic Authentication

Name	<name>
Type	HTTP
Proxy Type	Internet
Authentication	Basic Authentication
URL	URL
Username	<Username> of the Communication User
Password	<Password> of the Communication User

Additional Properties to Destination

Additionally, add the following properties in the destination for cloud integration

sap.applicationdevelopment.actions.enabled	true
sap.processautomation.enabled	true

• Configure SAP Build Process Automation Email

Mail notifications are used in this template to send notifications to requestor, approver and admin during different stages of the process. Follow the instructions to setup mail destination in your SAP BTP Account.

Configuring destination, see **Configure a SMTP Mail Destination.**

- For more information refer to Create HTTP Destinations and OAuth User Token Exchange Authentication.

Document Management Service

In this template, the Input Template document for Sales Contract and any supporting documents can be uploaded in the approval form which are then made available as attachments for review and approval to the respective participants. To upload the document from the form, you will need SAP Document Management Service or equivalent CMIS repository and a corresponding destination in SAP BTP to connect to the repository.

Follow the instructions to Configure SAP Document Management Service for Attachments

Note: The destination needs to be created with **sap_process_automation_document_store** name.

IMPORTANT NOTE: This template content is to accelerate your solution development. You can modify this template according to your own requirements to achieve your business goals. To use this template content, you need to have basic knowledge and understanding of SAP Build Process Automation and its capabilities.

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User Roles Configuration

Role Name	Purpose
ProcessAutomationDeveloper	To setup this content package, you need to have this role assigned to the respective user.
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 account.
2) Select the Project Type filter as "**Process Automation**"
3) In the Search bar type "**Mass Maintenance of Sales Quotations**"
4) Select the "Create from Template" button to add the template into you lobby.
5) After successfully adding the template, navigate back to the lobby to find the "Mass Maintenance of Sales Quotation" template available for use.

Caution: Be sure to select the **Project Type as "Process Automation" in the filters**.

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.

Process & Triggers

This package can be used to read sales quotations from S/4HANA and create/update sales quotations in S/4HANA.

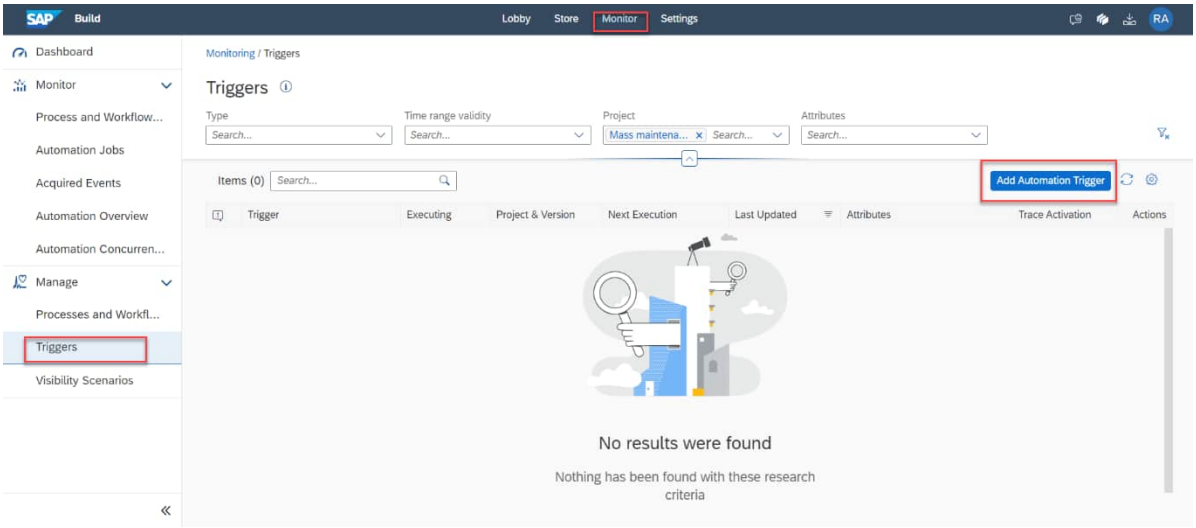
For these two scenarios we can create two types of triggers in both attended and unattended.

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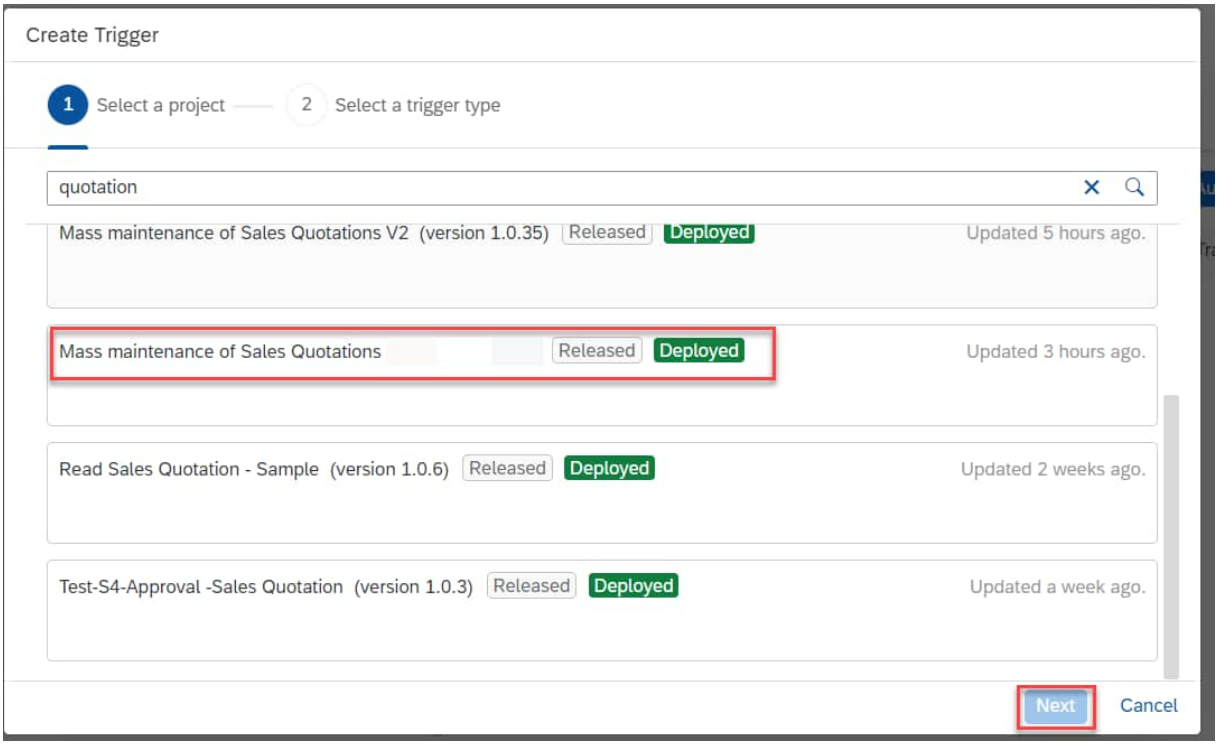
Read Sales Quotations Trigger

This trigger is configured with **Mass Maintenance of Sales Quotation** package which is responsible to read list of sales quotations from S/4HANA system and update in template file.

- In order to create trigger for read sales quotations bot,
  - Go to monitor tab
  - Click on Triggers
  - Select add automation trigger

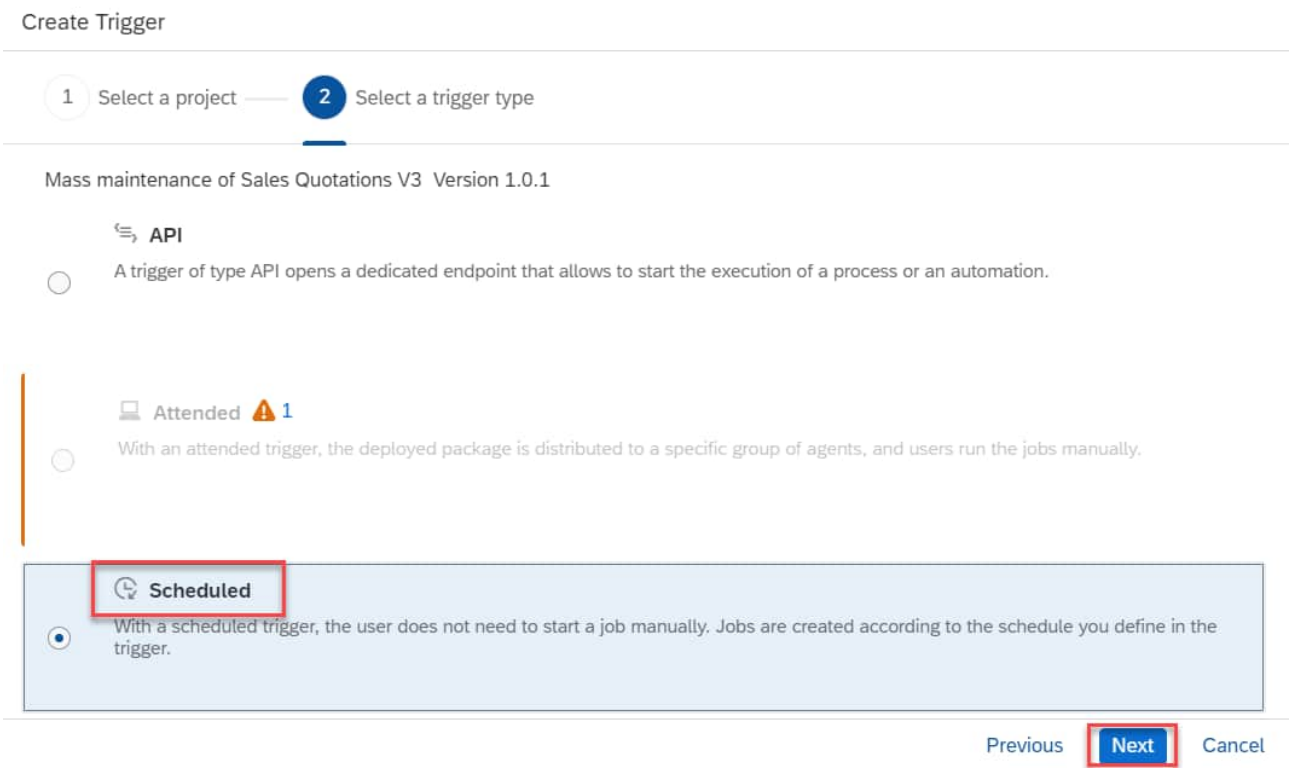


- Select Mass maintenance of Sales Quotations package and click on next.

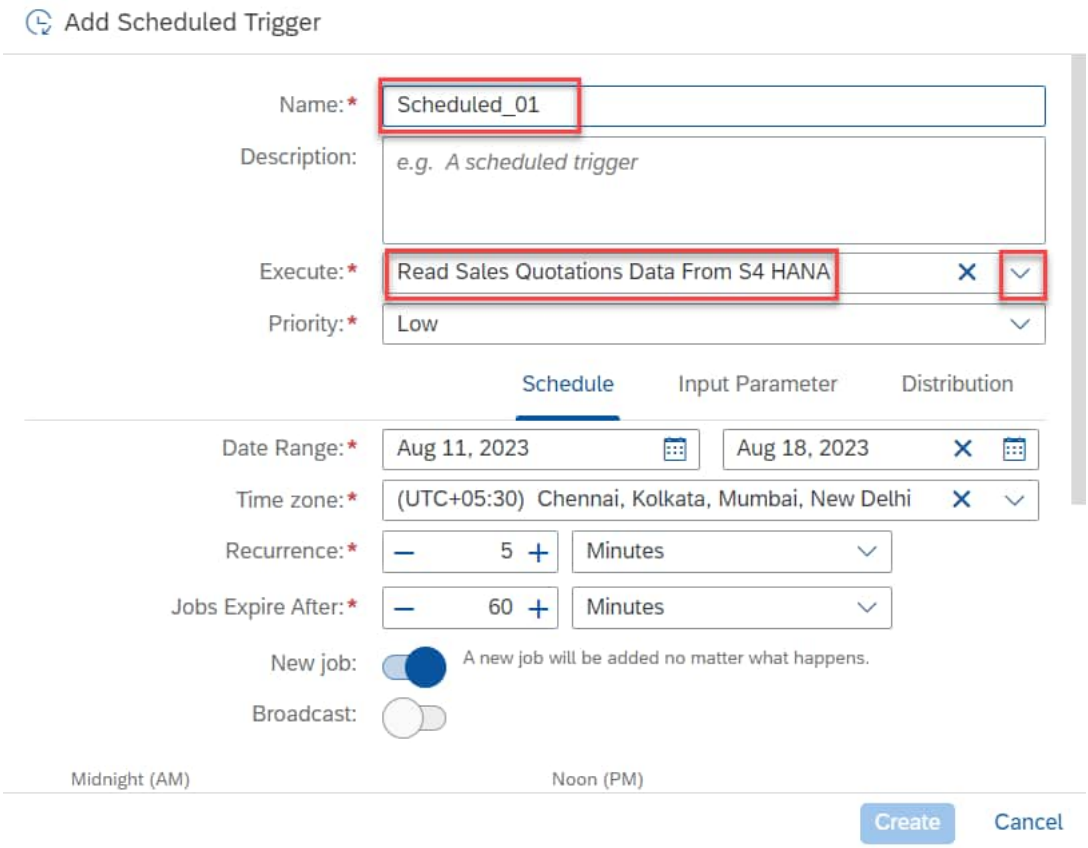


- Select scheduled and click on next

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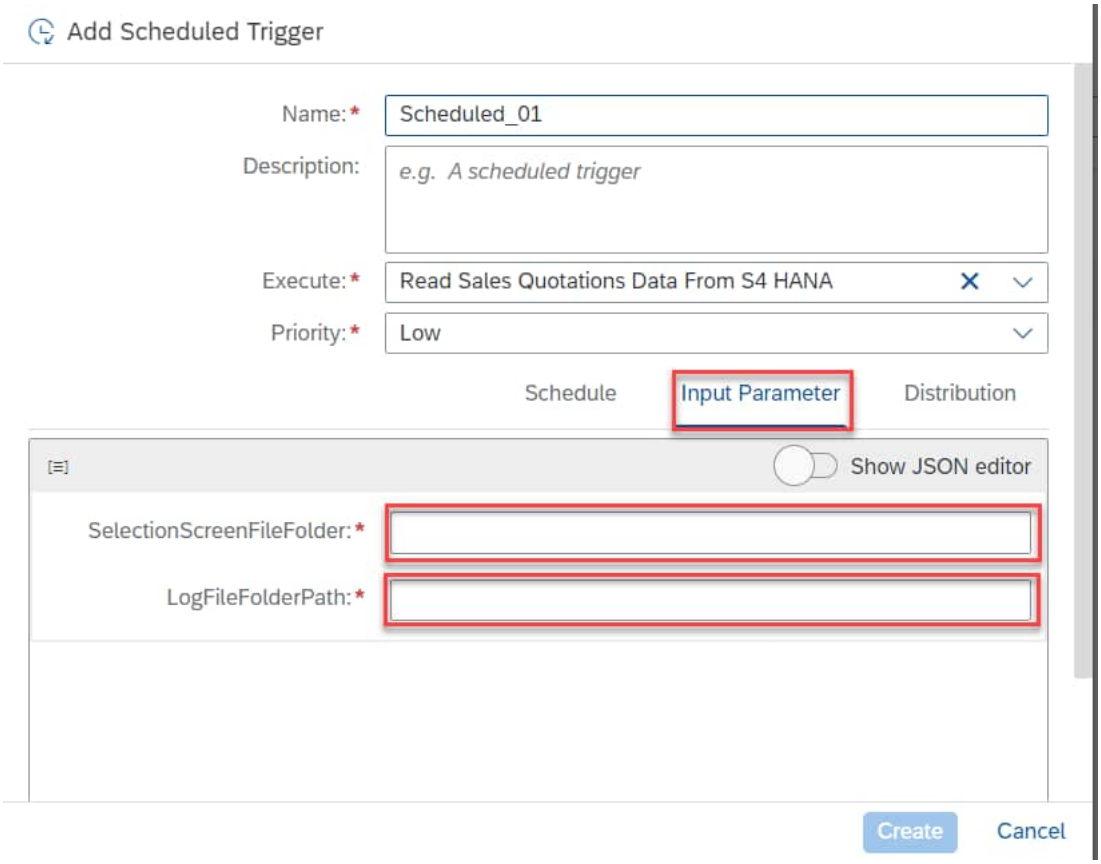


- Enter schedule name and select Read Sales Quotations Data From S4 HANA automation from execute dropdown.

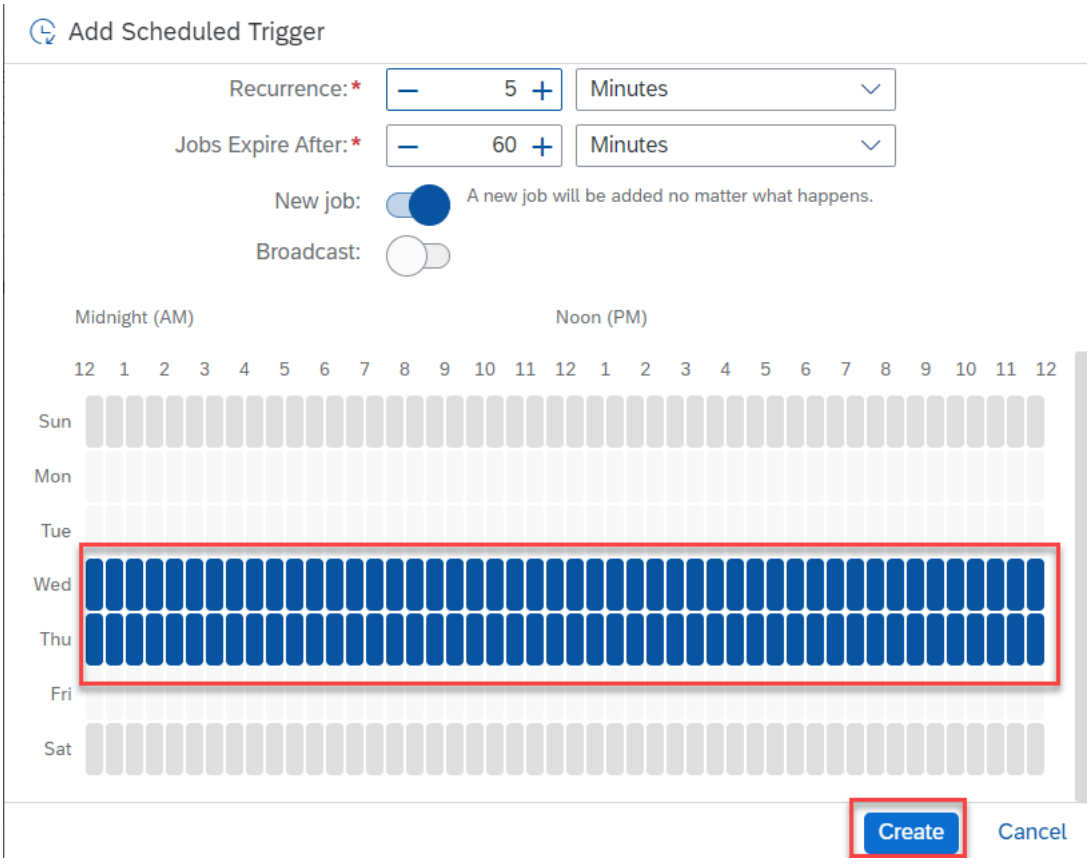


- Goto input parameters tab and provide required inputs.

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- Select require dates to run and click on create button.

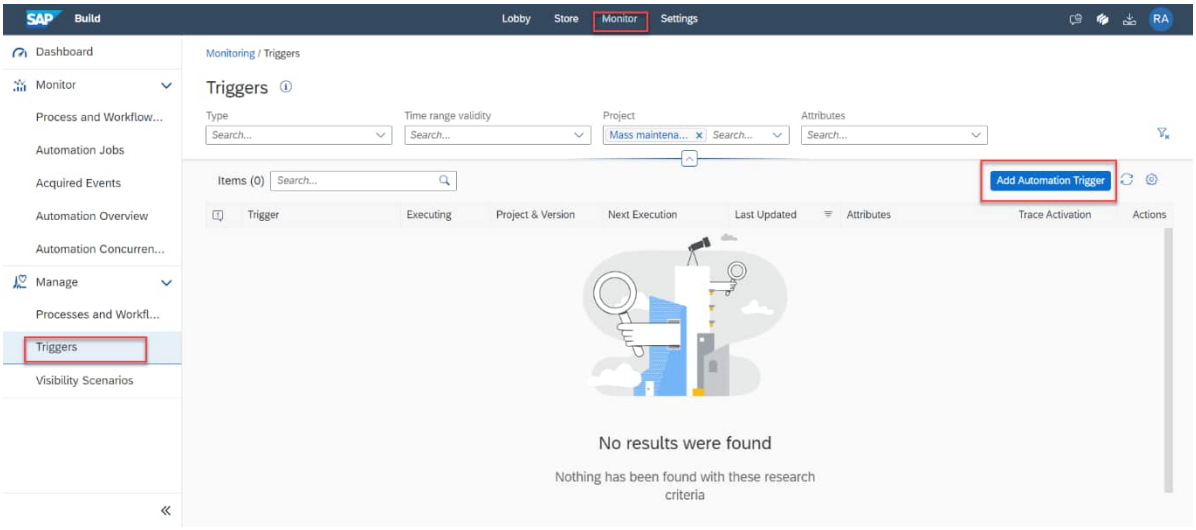


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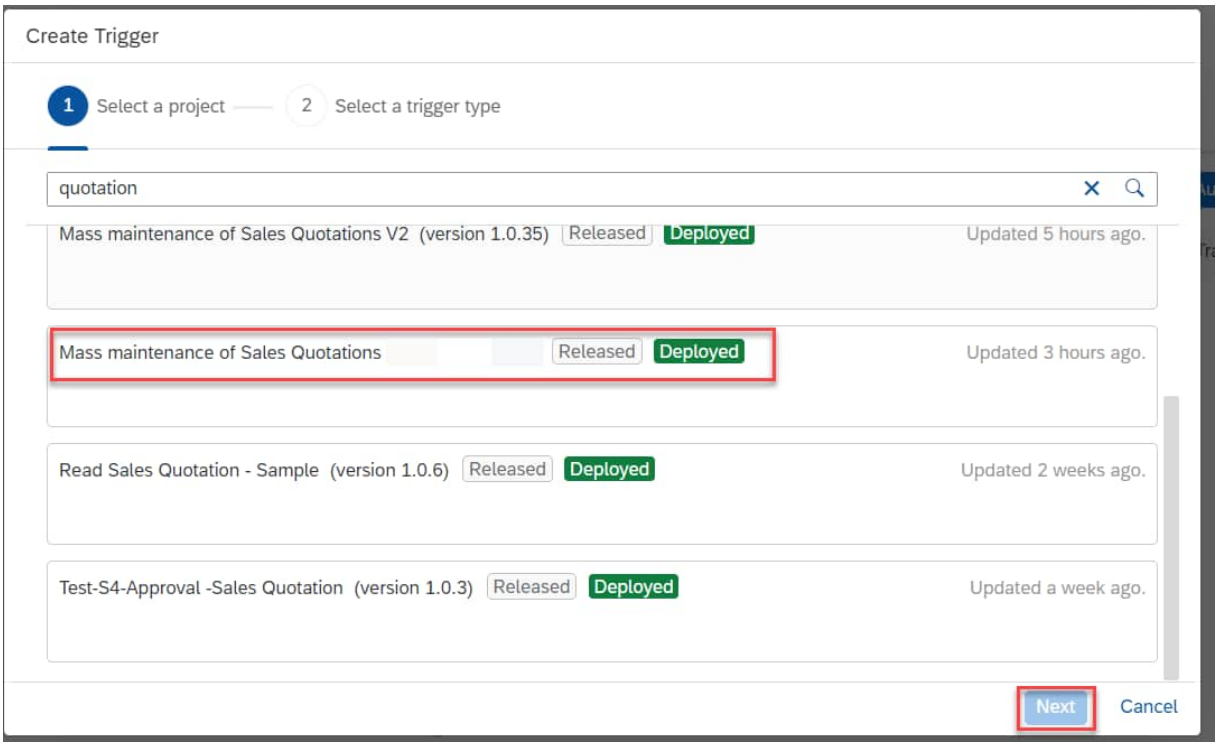
Create or Update Sales Quotations Trigger

This trigger is configured with **Mass Maintenance of Sales Quotation** package which is responsible to create or update list of sales quotations in S/4HANA system.

- In order to create trigger for create/update sales quotations bot,
  - Go to monitor tab
  - Click on Triggers
  - Select add automation trigger

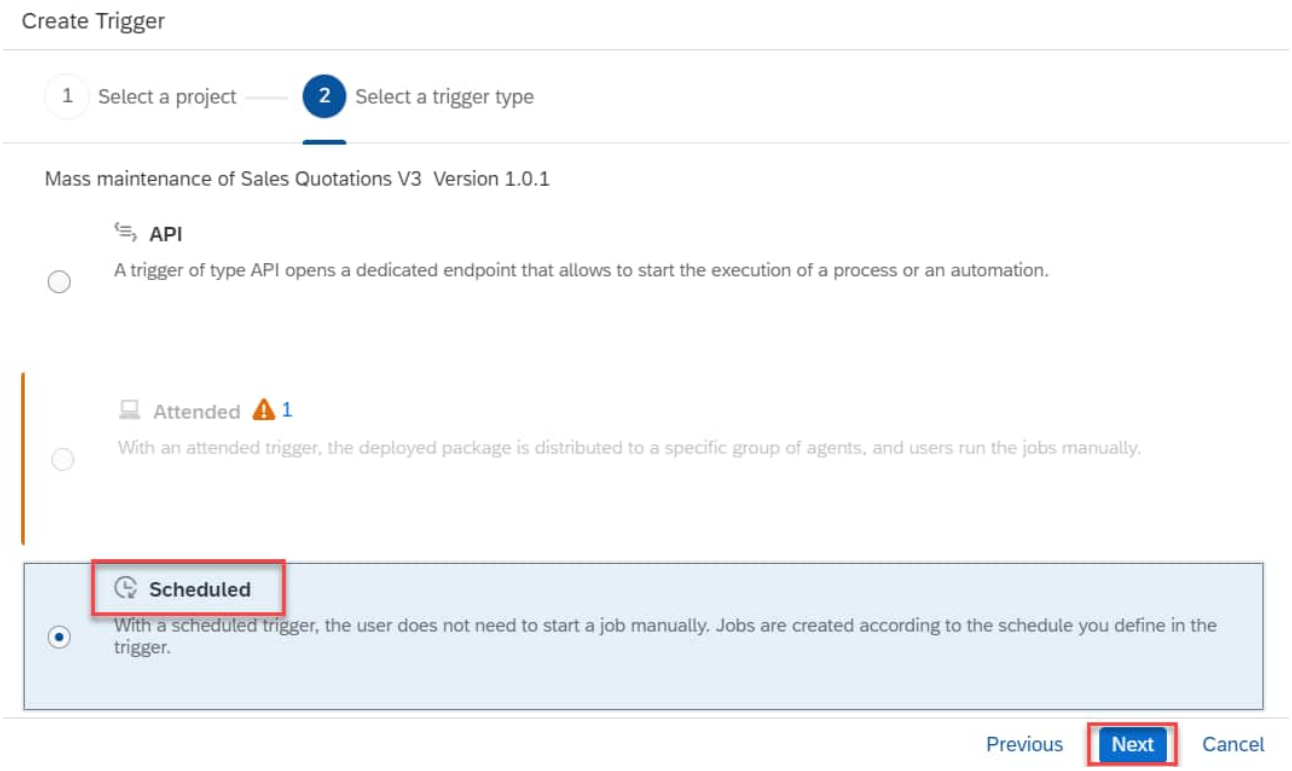


- Select Mass maintenance of Sales Quotations package and click on next.

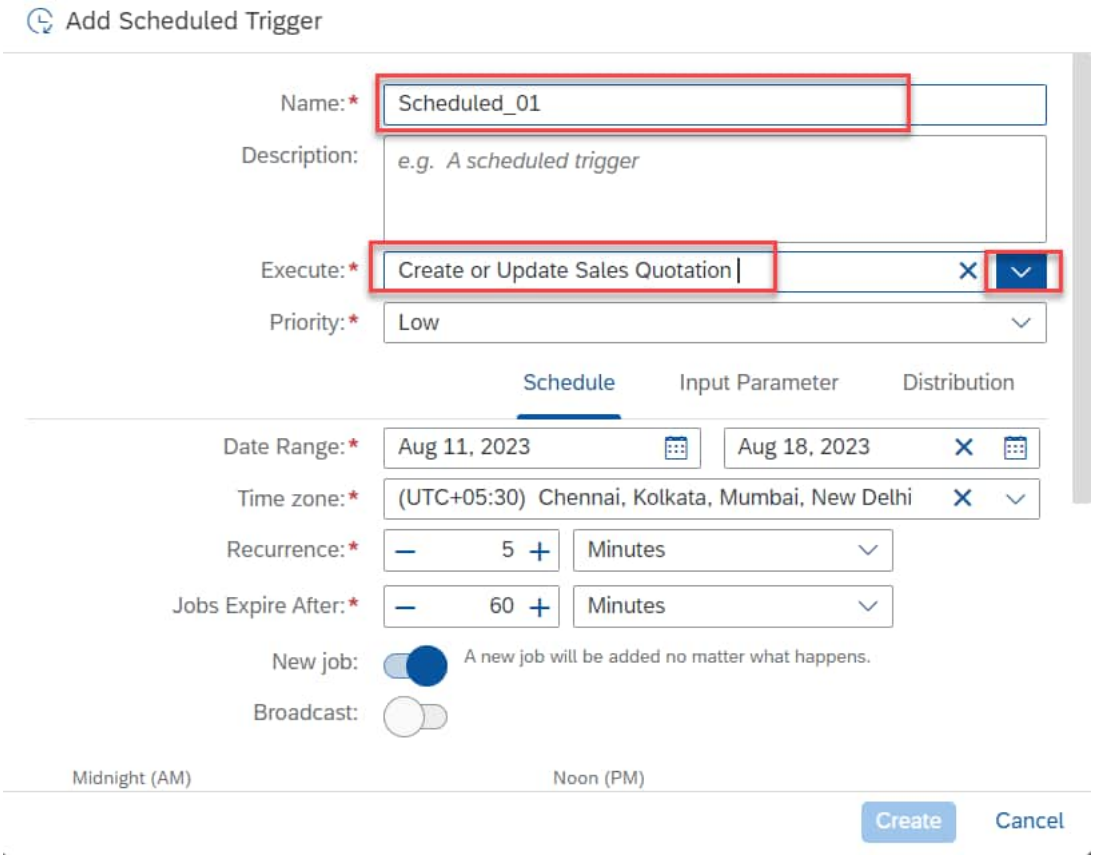


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- Select scheduled and click on next

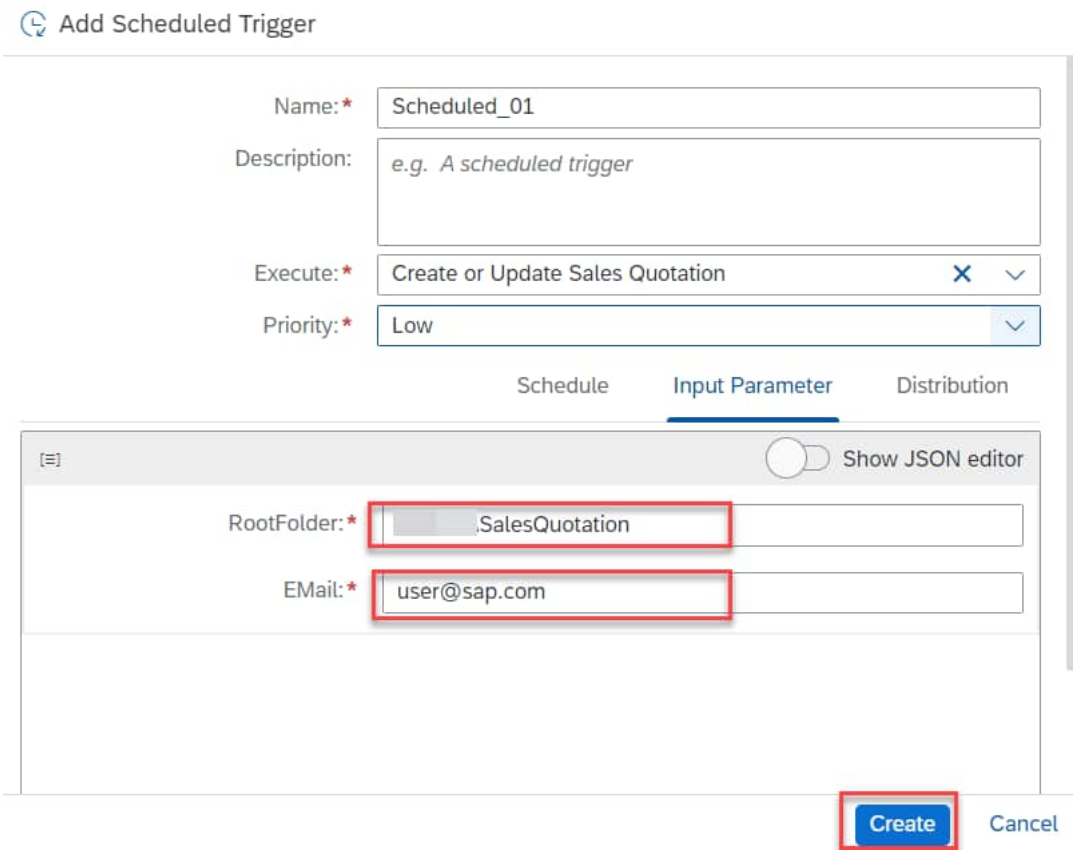


- Enter schedule name and select Create or Update Sales Quotation automation from execute dropdown.



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- Goto input parameters tab and provide required inputs and click on create.



Configure Process

This package contains the subprocesses "**Mass Maintenance of Sales Quotations**" & it does not need to be explicitly configured. It can be utilized after successful deployment.

Configure Forms (Optional)

This template contains multiple forms. You can update or extend the forms based on your requirements. To edit the 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.

Configure Decisions

There are two decisions in this template

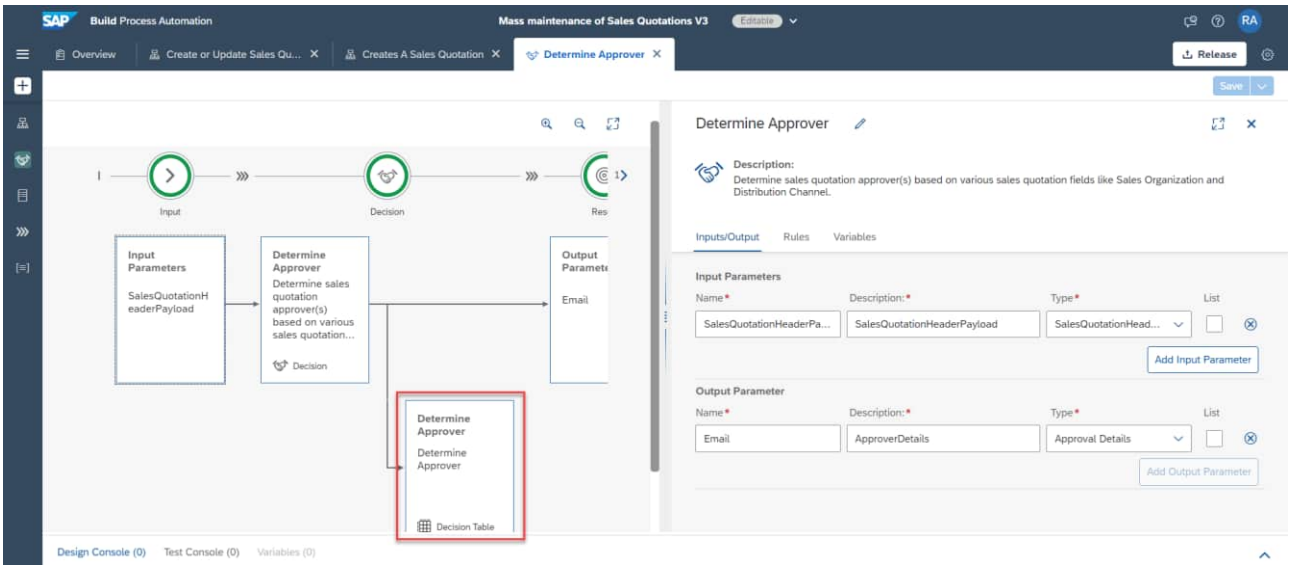
- Determine Approver
- Determine Process Admin

Determine Approver:

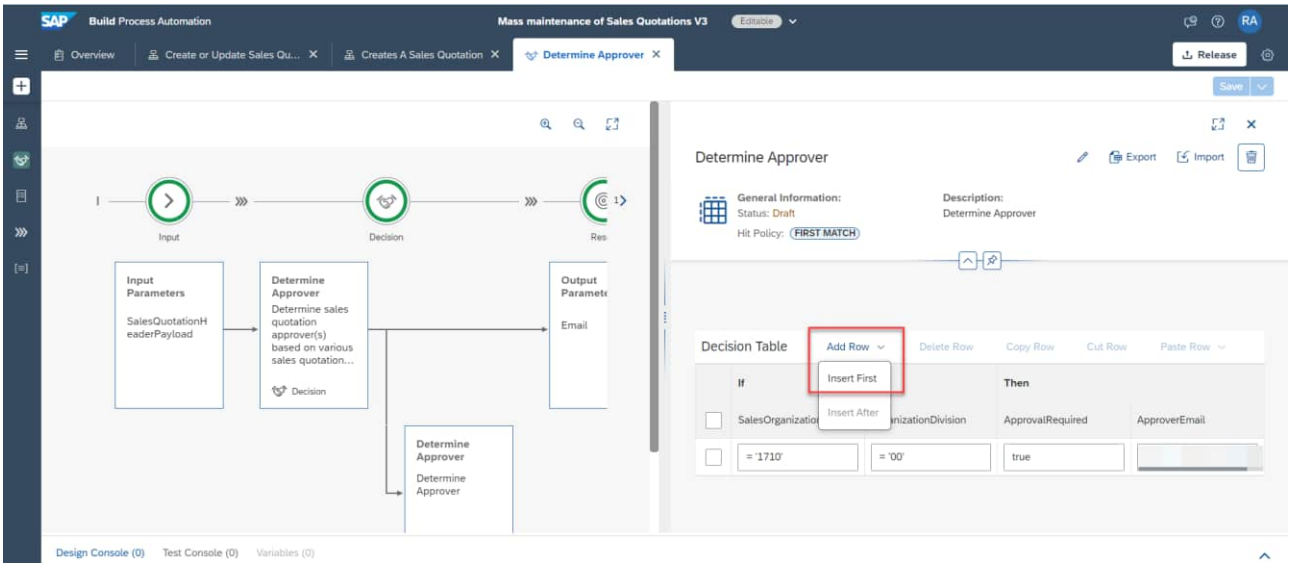
This decision can be modified for different conditions and result values based on your business policies and requirements. To modify the decision:

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- In process editor, double click to open the Decision
- Select the rule from the decision diagram



- Edit the rule to add more rows or update existing values



Configure Email

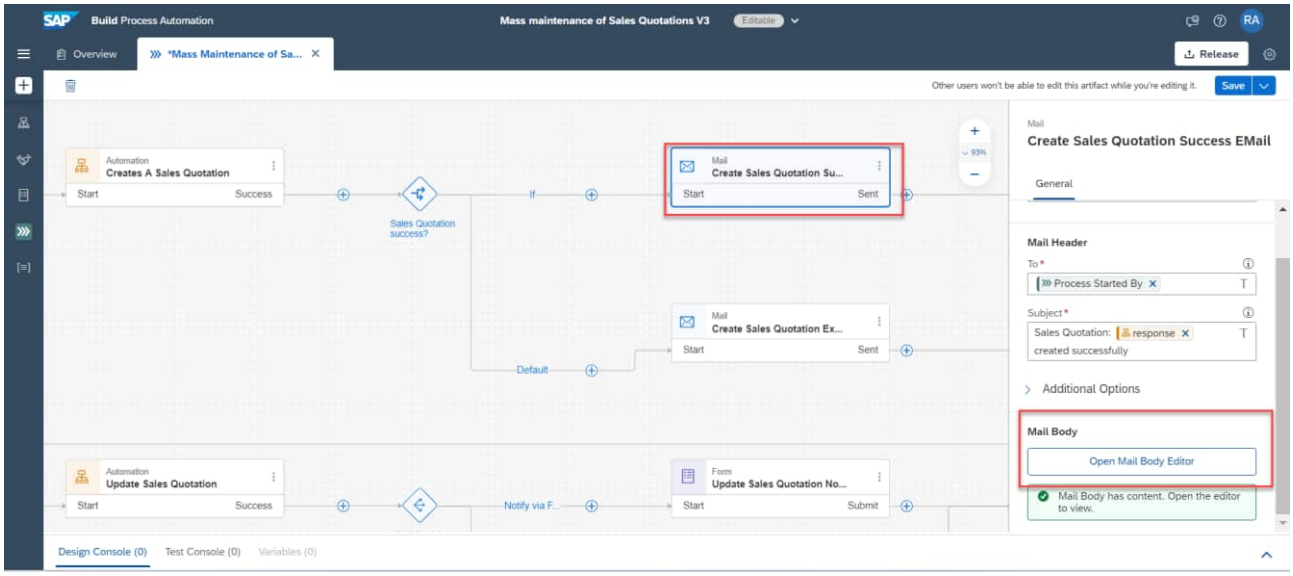
Email notifications are sent to requestor, approver and admin at different places during process execution. All the email artefacts in the process have default template body which can be changed.

To update the email body content, do the following:

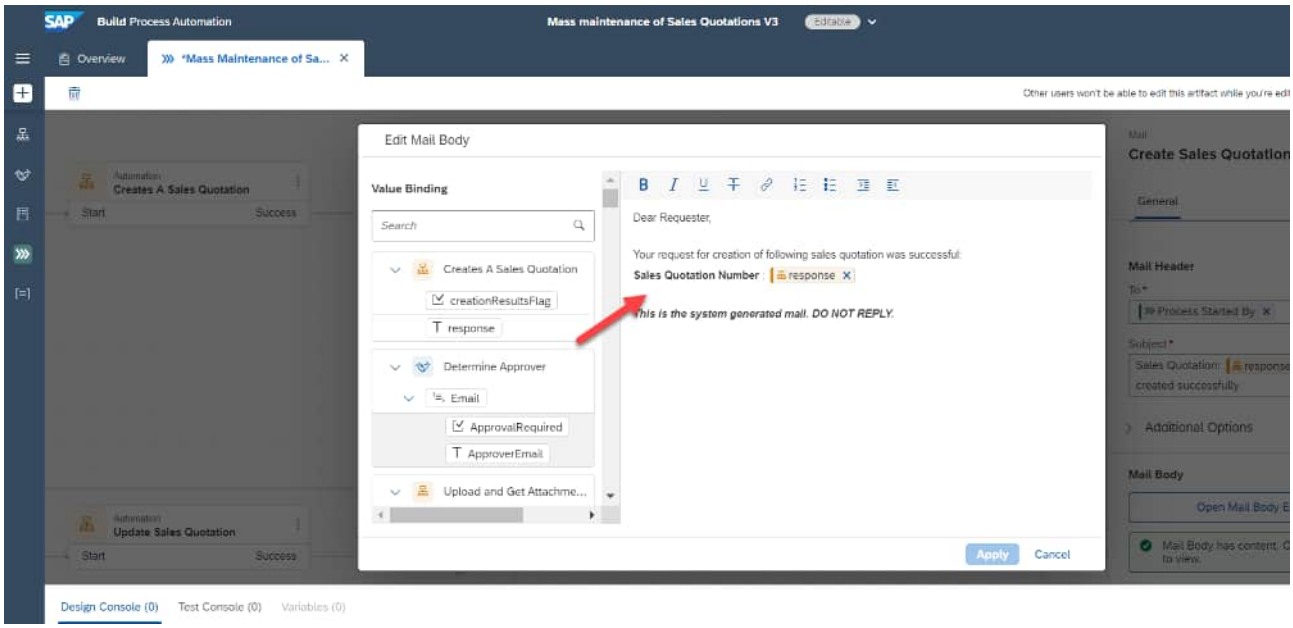
- Select the mail artefact in the process
- From the Settings in the right side panel, check the Mail Header to confirm the **To** field (or email recipients) and the **Subject**. You can adjust the subject and recipient, if needed.

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- Click to ‘Open Mail Body Editor’.



- 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.



Configure Process Visibility (Optional)

This template has a pre-built dashboard with default business KPIs that can be used by the business users to track end-to-end processes in real-time. You can add more KPIs based on your business requirements.

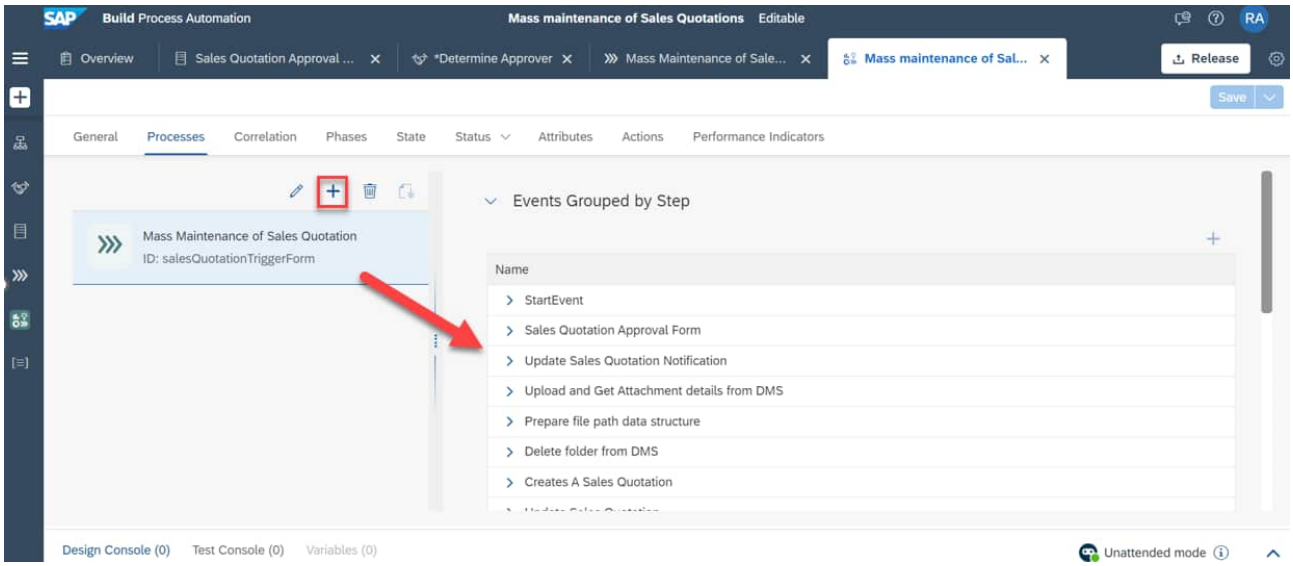
To configure the visibility scenario:

- Open project ‘**Overview’** tab

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- Select **Mass Maintenance of Sales Quotation** (Visibility Scenario)
- Explore and change Phases, Attributes, Performance Indicators etc. [Follow the documentation to learn how to configure process visibility scenario]

In case you don't have access to the process visibility workspace where you can access the newly created dashboards, please contact your IT admin.



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 two destination needs not be configured in the SAP BTP cockpit:

- **sap_document_management_service**: To handle document attachment using Document Management Service.
- **sap_s4hana_sales_quotation**: To provide API access to S/4HANA public cloud.

Note: Above destination names are the sample destination names configured in BTP & can be named as per project requirement.

To add new destination in SAP Build Process Automation settings, follow the instructions here.

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, Follow this documentation.

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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 tosubmit requests and the approvers to view items in their inbox.

To deploy a released version of your process, Follow this documentation.

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

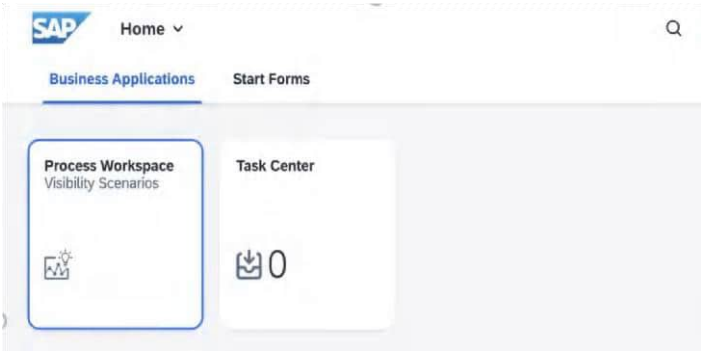
For more details about the Destination artefact, please read our documentation.

Configure SAP Work Zone

Now that the process is released and deployed, you can configure **SAP Work Zone standard or advanced edition** to give access to your business users to (a) start the process and (b) track the process and business KPIs using process visibility workspace.

You can refer following links to configure SAP Work Zone standard edition:

- Follow the documentation to configure start form in Work Zone
- Follow the tutorial to configure Work Zone with visibility tiles

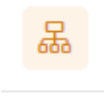
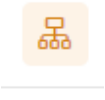
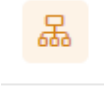


User Guide

Capabilities

This template content contains the following key artifacts:
Please refer help documentation about these different artifacts.

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Icon	Type	Name	Description
	Automation	Read Sales Quotations Data from S/4HANA	This is the main Automation that is used to fetch list of sales quotations from S/4HANA based on the selection screen file data.
	Automation	Create or Update Sales Quotation	This is the main Automation that is used to create or update sales quotations in S/4HANA system.
	Process	Mass Maintenance of Sales Quotation	This is the approval process and responsible to approve or reject for create/update Sales Quotation in S/4HANA cloud system..
	Form	Sales Quotation Approval Form	This Approval Form is used by the approver to view sales quotation details. The sales quotation header and item details can be viewed here along with input attachment. The Approver can approve (to the next level, if it exists) or reject the request.
	Form	Sales Quotation Update Notification	This notification form is used to display update status of sales quotation header and item details.
	Form	Sales Quotation Rejection Notification	This notification form is used to display rejection notification with sales quotation header and item details.
	Decision	Determine Approver	This decision is responsible for providing approver details based on business rules defined.
	Decision	Determine Process Admin	This decision is responsible for providing process admin details based on text rule defined.
	Automation	Creates A Sales Quotation	This is the sub-automation that is used to call POST action to create a sales quotation in S/4HANA system.
	Automation	Update Sales Quotation	This the sub-automation that is used to call PATCH action to update sales quotation in S/4HANA system.
	Automation	Prepare Payload for API Call	This is the sub-automation that is used to prepare payload data to call GET sales quotations from S/4 HANA system.
	Automation	Write Sales Quotation Header Details to Input Template File	This is the sub-automation that is used to write all sales quotations header details from S/4 HANA to input template file.
	Automation	Write Sales Quotations Item Details to Input File	This is the sub-automation that is used to write all sales quotations item details from S/4 HANA to input template file.
	Automation	Prepare file path data structure	This is the sub-automation that takes input as file path type as string and gives output as object with file path details.

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	Automation	Get Attachment details from DMS	This is the sub-automation that is used to create DMS folder and upload input file in DMS folder and gives folderId as output to attach the input file in the approval form.
	Automation	Create Folder in DMS	This is the sub-automation that is used to create folder in DMS with timestamp.
	Automation	Upload attachment to DMS	This is the sub-automation that is used to upload input file in DMS folder created in above automation.
	Automation	Get DMS folder content	This is the sub-automation that is used to prepare structure with DMS folderId to attach input file in the approval form.
	Automation	Delete folder from DMS	This is the sub-automation that is used to delete folder from DMS.
	Automation	Update Log File	This is the sub-automation that is used to update count for fetched sales quotation header and items from S/4 HANA in log file.
	Automation	Send EMail for Read Sales Quotation	This is the sub-automation that is used to send an email to user after fetching sales quotations from S/4 HANA.
	Automation	Move Processed File & Send Mail	This is the sub-automation that is used to move the processed file from 'ToBeProcessed' to 'Processed' folder. It also updates the log file & send mail
	Mail	Create Sales Quotation Exception EMail	This Email is responsible to notify the requester when sales quotation is not created.
	Mail	Create Sales Quotation Success EMail	This Email is responsible to notify the requester when sales quotation is created.
	Mail	Sales Quotation Update Status	This Email is responsible to notify the requester when sales quotation details are updated in S/4HANA.
	Mail	Email: Missing Approver	This Email is responsible to notify admin to assign approver for sales quotation.
	Action	Get all Sales Quotations header details	This Action is used to get list of sales quotations with header details from S/4HANA cloud system.
	Action	Get all Sales Quotations with all items	This Action is used to get list of sales quotations with all item details from S/4HANA cloud system.
	Action	Creates a sales quotation	This Action is used to create a sales quotation with header and item details in S/4HANA cloud system.

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	Action	Update Sales Quotation - Header Data	This Action is used to update sales quotation header details in S/4HANA cloud system.
	Action	Update Sales Quotation - Item Data	This Action is used to update sales quotation item details in S/4HANA cloud system.

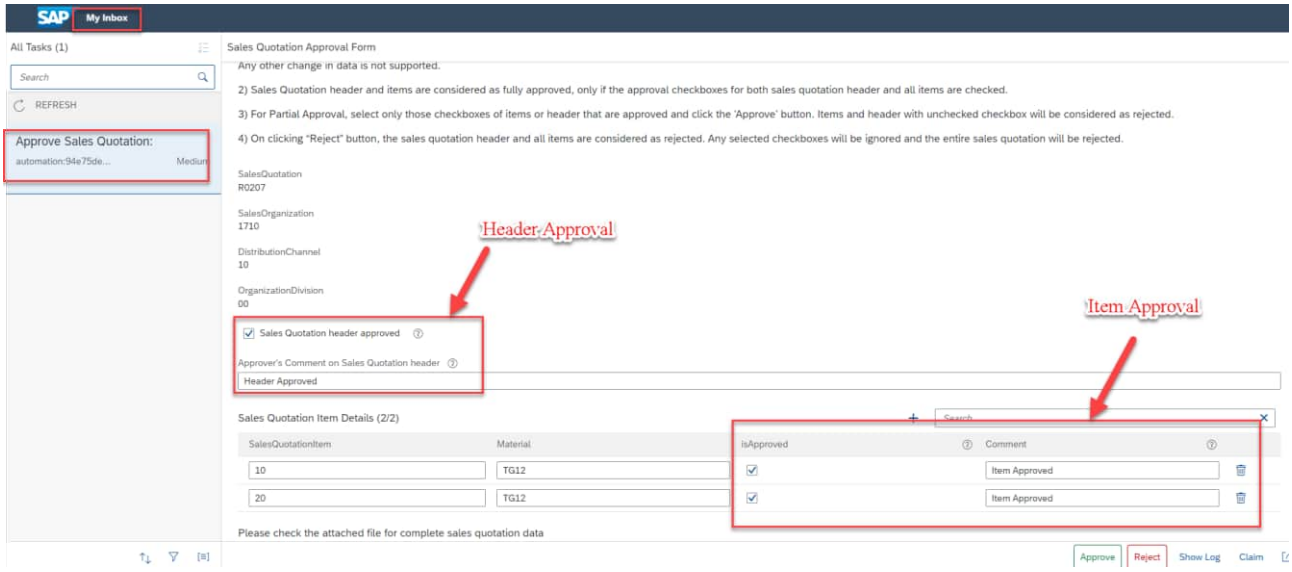
Forms

This template includes following forms:

- **Sales Quotation Approval Form:** Provides the requested Sales Quotation details along with input data file to the determined approver for their approval. Approver can review & provide approval along with comments.
- **Sales Quotation Rejection Notification:** Provide required Sales Quotation details along with approver's comment about the rejection reason.
- **Sales Quotation Update Notification**: Provide required Sales Quotation Details along with status message from the update operation.

Note: User needs to review and submit the notification form in inbox to complete the execution from their end

Following is a snapshot from the Approval Request form as received by approver in their inbox:



Actions

For each action, there is an associated Action Project, which also gets imported when you import the business project. If you have to modify the Action input and output, then you have to update the Action Project, release and publish the changes. Follow this documentation to learn more about Action Projects

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All Sales Quotations header details & All Sales Quotations with all items

This Action is triggered to get list of sales quotations header details from S/4HANA cloud system based on the selection screen file data. Sales quotation, sales org, distribution channel, organization division and validity dates can send as input to action as shown below:

Create a sales quotation

This Action is triggered to create sales quotation in S/4HANA cloud system. Sales quotation header and item details can send as input to action as shown below:

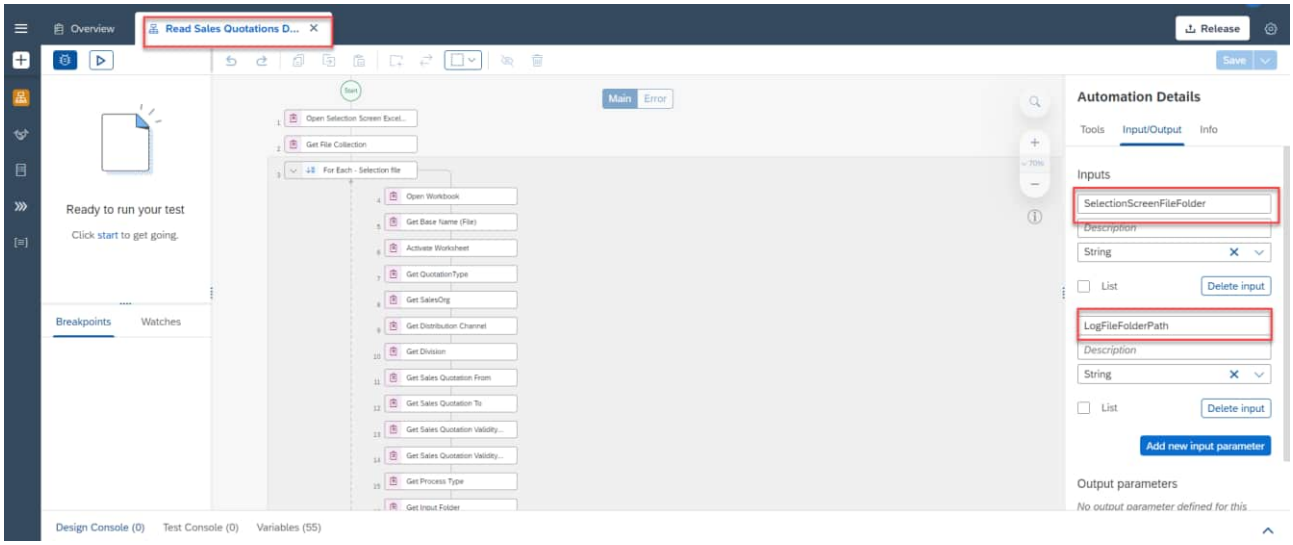
Update Sales Quotation - Header Data & Update Sales Quotation - Item Data

These Actions are triggered to update sales quotation header and item details in S/4HANA cloud system. Sales quotation header and item details can send as input to actions as shown below:

Automations

Read Sales Quotations Data from S/4HANA

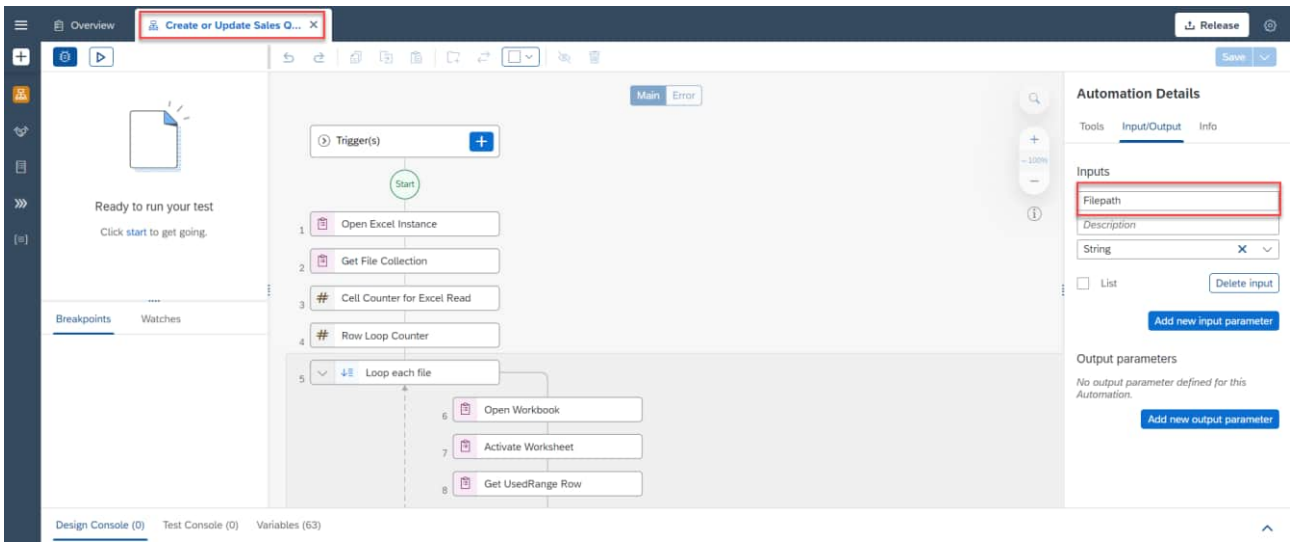
This automation is used to read list of sales quotation header and item details from S/4HANA system. Input of this automation is selection screen folder path and logfile folder path.



Create or Update Sales Quotation

This automation is used to create or update sales quotations with header and item details in S/4HANA system. Input of this automation is input template file path.

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Decisions

Determine Approver

This decision is used in the Approval process step to determine the potential approver(s) based on different Sales Quotation attributes.

Determine Process Admin

This decision is used to determine process administrator to assign approver when approver is not defined.

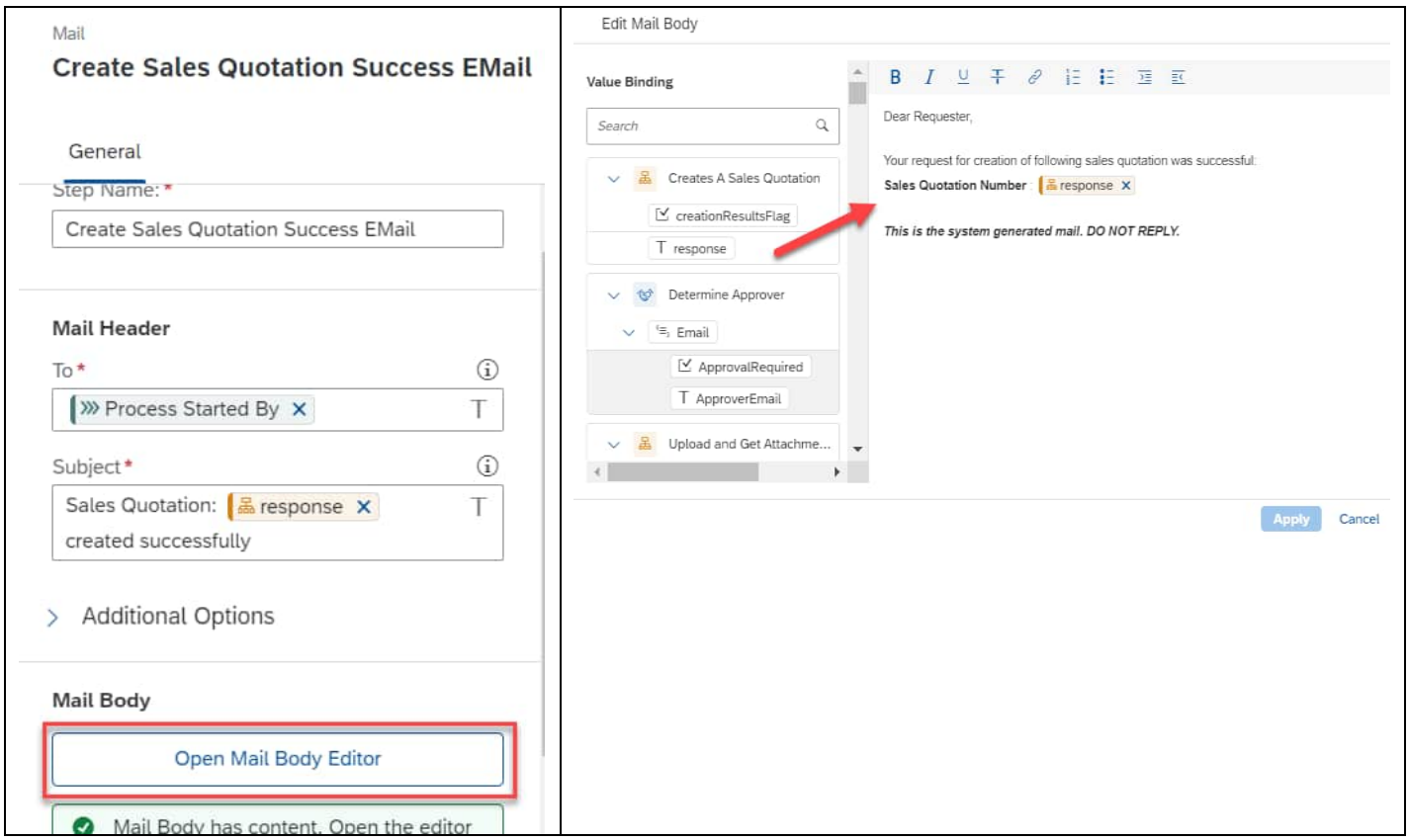
Email Notifications

The multiple email blocks throughout the process serve to:

- Notify the Requester / Approver via email that the request has been approved/rejected/auto approved for sales quotation.

The image below shows how the mail is configured, in the template, to send an email to the requestor after sales quotation is created.

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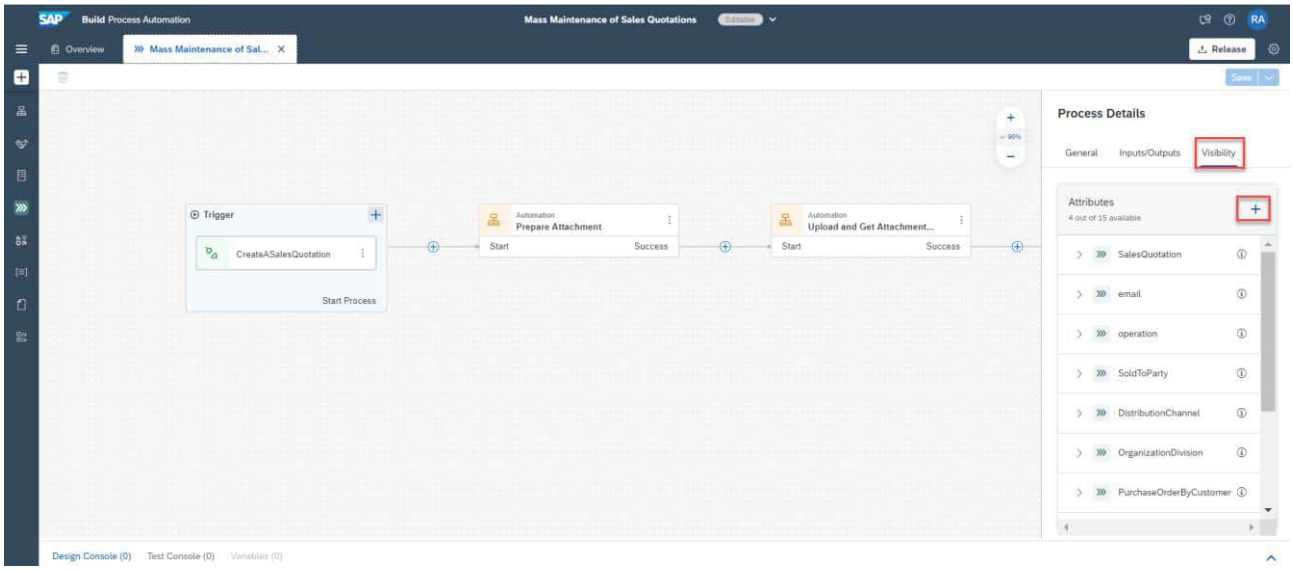


Process Visibility Scenario

The visibility scenario is a dashboard which allows business users to track relevant process KPIs and statuses. A default dashboard is provided with this template, and it can be customized by selecting attributes from your process which you want to track in the process dashboard.

You can create visibility scenario artifact like any other artifacts in the process. After creating it click the processes tab & select the required process.

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Dependencies

Technical Dependencies

The below component versions are used to generate the mentioned Mass maintenance of Sales Quotations process.

Component	Version
Desktop Agent	3.17.55
SDK Core	1.40.31
SDK Excel	1.40.31
SDK Outlook	1.40.31
Action Project Dependency	Sales Quotation (A2X)

Note: Automation will work with the version greater than above mentioned version

Support

There is no support available for the template content. If you experience general issues with SAP Build Process Automation, raise an incident via SAP Support Portal on **BPI-PA** component.

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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