

SAP BUSINESS TECHNOLOGY PLATFORM | EXTERNAL

End User Guide

Sample Sales Order Approval Extension with flexible workflow

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Overview

This document provides information about how to use the user interfaces of Sample Sales Order Approval Extension using flexible workflow capability of SAP Business Workflow in combination with SAP Workflow Management / Workflow Capability on SAP BTP. Approvers, Requestors and Process Operators are the target users of the user interfaces explained in this document.

Manage Sales Order Approval Process content package for SAP S/4HANA enables to automate sales order 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 order in SAP S/4HANA system, a pre-configured process variant is triggered in SAP Workflow Management based on configurable business conditions. On approval, a sales order 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 order
- 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 Order 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 Order must be created in SAP S/4HANA or SAP S/4HANA Cloud
2. Flexible Workflow Scenario with Extension Step is configured

Sample Sales Order Approval Extension

The Sample Sales Order Approval Extension workflow content enables the business user to view the Sales Orders which are configured for external approvals and make a decision to Approve or Reject or Request Rework the Sales Order which in turn will Release or Reject it in SAP S/4HANA or SAP S/4HANA Cloud.

Approve/Reject Sales Order

Once a sales order that requires 'External Approval' is created in SAP S/4HANA system, based on the business configuration (such as net value of the Sales Order), a Flexible Workflow will be triggered and this will start the extension workflow. Then users will receive tasks in My Inbox application.

My Inbox Tasks

The My Inbox application in SAP Workflow Management 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 Order Header – Header details of Sales Order
2. Sales Order Items – Item level details of Sales Order
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 Order 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 Order

Rejection

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

The screenshot shows the SAP Sales Order interface for Standard Order 1398. The 'Approval Status' is highlighted in a green box and shows 'Rejected' with a red 'X' icon. Other status indicators include 'Overall Status: Completed', 'Rejection Status: Everything Rejected', and 'Credit Status: Not Performed'. The net value is 0.00 USD.

Item	Product	Requested Quantity	Item Category	Requested Delivery Date	Overall Status	Rejection Status	Net Value
1	IFRS SFS Test Material 1 (IF11)	500	PC Standard Item (TAN)	05/14/2021	Completed	Fully Rejected	25,000.00 USD

To be reworked

In case the Sales Order needs to be reworked.

The screenshot shows the SAP 'Display Standard Order 3091653: Header Data' screen. The 'Approval Status' is 'To Be Reworked' with a reason of 'Approval Reason BKR (interna)'. The overall status is 'Open'.

Overall Status	Open	
Approval Status	To Be Reworked	Reason: Approval Reason BKR (interna)
Rejection Status	Nothing Rejected	
Delivery Status	Not Delivered	
OverallCredStat	Not Performed	
Ord.-Rel. Billg Sts	Not Invoiced	
Overall Block Status	Not Blocked	
System Status	REL	
User Status	Crea	
ARun Status	Not Relevant	
MSO Explosion Status	Not Relevant	
Prod. Marketbly Sts	OK - Not Relevant	
Dangerous Goods Sts	OK - No Dangerous Goods; Not Relevant	
Sfty Data Sheet Sts	OK - Not Relevant	

Overall Header	Complete	All Items	All Items Complete
Delivery - Hdr	Complete	Deliv-All Itms	All Items Complete
Billing - Hdr	Complete	Billg-All Items	All Items Complete

Object status

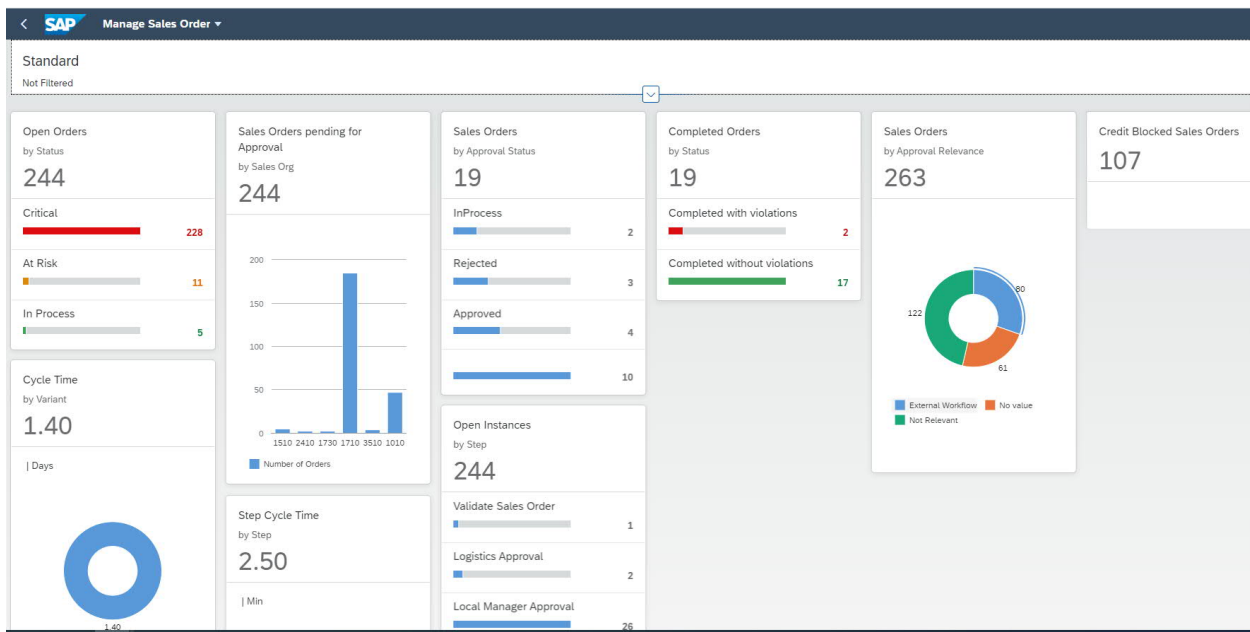
Process Visibility Workspace

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 Sample Sales Order Approval Extension content package provides such out of the box visibility and process performance indicators for all the active process variants in SAP Workflow Management. A process owner or line of business expert can enhance the visibility scenario. In addition you can add as well the S/4HANA Flexible Workflow to the process visibility scenario.

Access Process Workspace

1. Go to Process Flexibility Cockpit
2. Select Manage Sales Order Approvals
3. Click Live Process Insights – Manage Sales Order Approvals

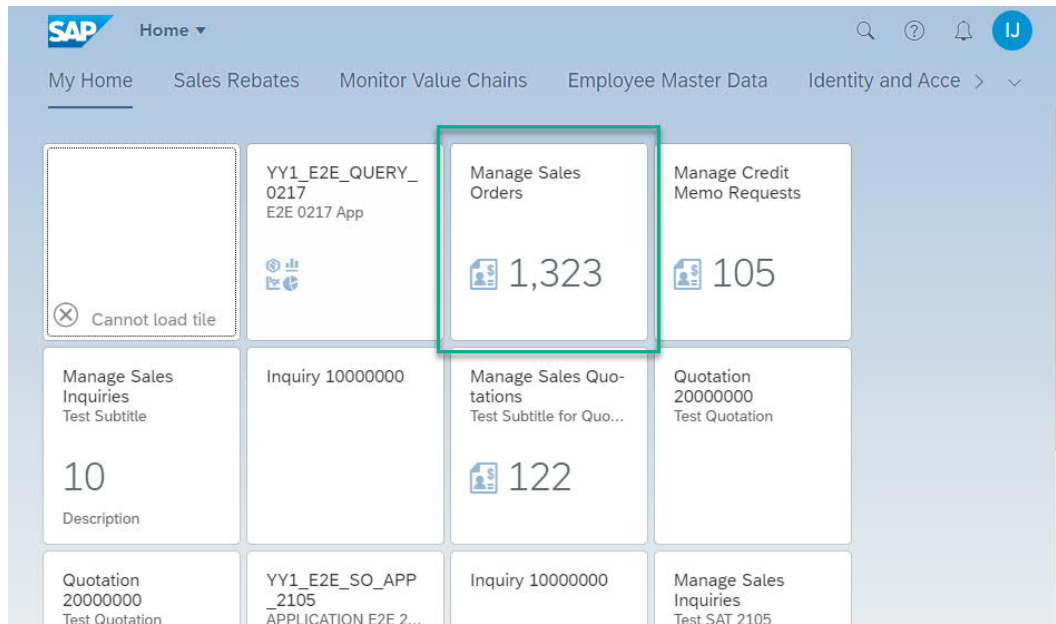


Please go through [help documentation](#) to know about process workspace.

Appendix

Sales Order Creation

A sales order can be created in the Manage Sales Orders application in the SAP S4HANA Fiori launchpad.



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

Header Label Details

Property	Value	Comment
Sales Order Type	OR	
Sales Organization	1710	
Distribution Channel	10	
Division	00	
sold to party	17100001	
Order Reason	BTP	

Item Label Details:

Property	Value	Comment
Product	IF11	


Requested quantity	20 PC	
Item Category	TAN	

Email Notification

When the sales order 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.

Delete Respond Sensitivity Quick Steps

Approve Standard Order (OR) 1417

 To: [Redacted]

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

Sales Order Details	
Sales Order	1417
Sold To Party	17100006
Customer Reference	ASO-CB-Flow 'B B-A B'
Document Date	11-MAY-2021
Sales Area	Dom. Sales Org US, Direct Sales, Product Division 00
Overall Status	Partially processed
Net Values	552963.31 USD
Sales Order Type	Standard Order (OR)
Sales Organization	Dom. Sales Org US (1710)
Distribution Channel	Direct Sales (10)
Division	Product Division 00 (00)
Approval Reason	ZBTP

This is an automatically generated message.

The requester in SAP S/4HANA gets a notification on the release or rejected Sales Order:

Email Template Preview

Dear Sir or Madam,

The sales order you submitted on {{SalesOrderDate}} has been approved.

Sales Order

{{SalesOrder}}

Net Value

{{TransactionCurrency}} {{TotalNetAmount}}

You can now perform any further document processing that may be required.

Kind regards,

Sales Document Workflow SYSTEM

**This is an autogenerated email. Please do not respond to this message.*

Dear Sir or Madam,

The sales order you submitted on {{SalesOrderDate}} has been approved.

Sales Order

{{SalesOrder}}

Net Value

{{TransactionCurrency}} {{TotalNetAmount}}

You can now perform any further document processing that may be required.

Kind regards,

Sales Document Workflow SYSTEM

**This is an autogenerated email. Please do not respond to this message.*