Materials Management (MM)

This case study explains an integrated materials management process in detail. This promotes a thorough understanding of each process step and the underlying SAP functions.

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| Product  S/4HANA 2020  Global Bike  Fiori 3.0  Level  Bachelor's degree  Masters  Beginner  Focus  Materials Management  Authors  Bret Wagner  Stefan Weidner  Version  4.1  Last Change  June 2022 | MOTIVATION  In the exercises for Materials Management, a procurement process was tracked with master and transaction data that had already been created.  This case study explains and executes a complete material procurement process from the creation of master data, through purchasing to payment for the delivered goods. |  | PREREQUISITES  Before you process the case study, you should familiarize yourself with the navigation in the SAP system.  To successfully perform this MM case study, it is not necessary to have completed all MM exercises. However, it is recommended.  NOTES  This case study uses the model company Global Bike, which was developed exclusively for SAP UA Curricula.  M:\Curricula\Vorlagen\Logo_Global Bike\Global_Bike_Logo_neu_2018\Logo1.png |



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|  | Process Overview | | |
| **Learning objective** Understand and execute an integrated procurement process.  **Scenario** To process a complete procurement process, you will assume various roles within Global Bike, for example: Purchaser, Warehouse Worker, Accounting Clerk. In general, you will work in the Materials Management (MM) and Financial Accounting (FI) departments.  **Employees involved** Joyce Hausman (Contract Manager)  Sandeep Das (Warehouse Supervisor)  Sergey Petrov (Warehouse Employee)  Wilton Saban (Inventory Supervisor)  Alberto Conti (Inventory Assistant)  Aura Maxwell (Purchasing Agent)  Tatiana Karsova (Goods Receipt Clerk)  Silvia Cassano (AP Accountant)  Shuyuan Chen (Head of Accounting) | | **Time** 170 min | |
|  | | | |
| Before you start the procurement process, you must create a new supplier (Mid-West Supply from Lincoln). You then create the new master record for a trading good (chain lock) in the system. After the stock is checked (empty), you initiate the procurement by creating a purchase requisition. You then generate a request for quotation and maintain the quotations for three different vendors (including your new vendor). After evaluating and accepting the bid from Mid-West Supply, you create a purchase order with reference to the original purchase quotation. You will then post the goods receipt document and confirm the physical receipt into warehouse stock. After creating two partial invoices, you will post the payment to the supplier and finally check all involved G/L accounts in financial accounting. The following graphic shows the entire process. | | | |
|  | | |
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|  | Step 1: Create Vendor | |
| **Task** Create a new supplier.  **Description** Use the SAP Fiori launchpad to create a new supplier (Mid-West Supply).  **Name (position)** Joyce Hausman (Contract Manager) | | **Time** 20 min |
|  | | |
| Suppliers are used in both financials and procurement. The master record of a vendor includes 3 categories – General Data, Finance, and Procurement. Vendors can be created centrally or with shared responsibilities. During central creation, all views are generated in one step and by one person. In the case of shared responsibility, finance and procurement create the views that are relevant for them. In this case study, the vendor is created centrally. As a result, the vendor master record contains all the information required to perform business transactions. | | Vendor Master |
|  | |  |
| To create a new supplier, go to the *Materials Management* space. In the *Contract Manager* section, you can use the *Manage Business Partner Master Data* app. | | Start |
|  | |  |
| The following screen appears: | |  |
|  | |  |
| On the *Manage Business Partner* screen, choose  and **Organization**. | | Organization |
| In the *Create Organization* popup window, leave the Business Partner field blank. The system will generate a unique number later. In the *BP Role* field, click  and in the *Select: BP Role* window, select **FI Vendor (FLVN00)**. | | FLVN00 |
| For the *Organization Title* field, select**Company** and enter **Mid-West Supply ###**as the *Name 1*. Compare your entries with the following screenshot. | | Company  Mid-West Supply ### |
|  | |  |
| Click . In the *Business Partner* view, in the *Basic Data* area, enter your three-digit number (**###**) as *Search Term 1*. | | ### |
| Go to the *Address* area and in the *Street* field, enter **335 W Industrial Lake Dr**, for *Postal Code* **68528**, for *City*, enter **Lincoln**, for *Country* **US** and *Region* **NE**. Under Standard Communication, select **English (EN)** as the *language*. Compare your entries with the following screenshot. | | 335 W Industrial Lake  Dr  68528 Lincoln  US  NE  English |
|  | |  |
| Go to the *Identification* tab and click  in the *Tax Numbers* section. In the line that appears, enter **US1** *as the Tax Category* and **12-3456###** as the *Tax Number* – replace ### with your number. | | US1  12-3456### |
|  | |  |
| Now go back to the *Roles* area and click. Choose **Vendor (FLVN01)** as the *Business Partner Role*. | | FLVN01 |
| Now click  in the row of the newly created business partner role. | |  |
|  | |  |
| You can now maintain company code-specific data for your business partner in the role of the vendor. Go to the *Company Codes* area and click . | |  |
| On the *Company Code* screen, enter **US00** in the *Company Code* field. Select the value in the selection help that appears automatically. Confirm with Enter. | | US00 |
|  | |  |
| Switch to the *Finance* area and enter **3300000 (Trade payables)** for *the Reconciliation Account*. In the *Payment Data* section, enter **0001 (Payable immediately Due net)** as the *Payment Terms* and select **Check** **Double Invoice**. Compare your entries with the following screenshot. | | 3300000  0001  Check Duplicate Invoice |
|  | |  |
| Now switch to the *Correspondence* area. Enter **your user** (LEARN-###) as the *Clerk ID at Supplier*. Now click  in the lower screen area. | | Your User |
| Back on the *Supplier* screen, go to the Purchasing Organizations area to enhance your Mid-West Supply business partner with purchasing-specific data. | |  |
|  | |  |
| Click  in the *Purchasing Organization* window. In the *Purchasing Organization* field, enter **US00**. | |  |
| On the *Purchasing Organizations* area, enter **USD** as the *Order Currency* and use the **F4 help** to search for the *Payment Terms* **Payable immediately Due net (0001)**. | | USD  Payable immediately Due net (0001) |
| Navigate to the *Partner Functions* area*.* Click on  and enter the partner function **VN** for vendor and press Enter. | | VN |
|  | |  |
| Click  to transfer your purchasing-specific data for your business partner. Then click  and then . The system automatically assigns a unique number to your supplier. | |  |
|  | |  |
| Click on the home icon  to go to the Fiori Launchpad Overview. | |  |
|  | |  |

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|  | Step 2: Create Material | |
| **Task** Create the material master record for a trading good.  **Description** Use the SAP Fiori launchpad to create the wholesale chain lock master data.  **Name (position)** Sandeep Die (Warehouse Supervisor) | | **Time** 20 min |
|  | |  |
| To create materials, go to the *Materials Management* space. In the *Warehouse Supervisor* section, you can use the *Manage Product Master Data* app. | | Start |
|  | |  |
|  | |  |
| On the Manage *Product Master Data* screen, click . | |  |
| In the *Create Master Data Record* dialog box that appears, enter **CHLK1###** as the *Product Number* and **HAWA (Trading Goods)** as the *Product Type*. Enter **EA (Each)** asthe base unit of measure for the *Product Group* **UTIL (Utilities)**. | | CHLK1###  HAWA  EA  UTIL |
|  | |  |
| Press . In the *General Information* area in the *Basic Data* section, enter **Accessories (AS)** for the *Division*. | | Accessories (AS) |
| In the *Descriptions* section, click . In the automatically added line, enter the *Product* **Chain Lock ###** for *Language* **EN** (English). Repeat this step and this time for *Language* **DE** (German), enter **Kettenschloss ###** as the *Product*. For both, replace ### with your number. Confirm your entries with Enter. | | Chain Lock ###  Kettenschloss ### |
|  | |  |
| Scroll down to the *Units of Measure* section. At the end of the line in which the unit of measure EA is already entered, click . | |  |
| On the *Unit of Measure* screen, in the *Dimensions* area, enter **65.00** for the *Gross Weight* and **OZ (ounce)** as the *Unit*. | | 65.00  OZ |
|  | |  |
| Click . | |  |
| Now go to the *Sales* area and enter **0001 (On pallets)** as the *Transportation Group*. Afterwards, navigate to the *Distribution Chains* area and choose . | | 0001 |
| On the *Distribution Chain* screen, enter *Sales Organization* **UE00 (US East)**, *Distribution Channel* **WH (Wholesale)**, and *Delivery Plant* **MI00 (DC Miami)**. | | UE00  WH  MI00 |
|  | |  |
| In the *Grouping Terms* area, choose **0001 (Make-to-order)** for the *Item Category Group*. Choose Enter. | | 0001 |
| Go to the *Sales Tax* area and choose *Tax Classification* **0 (Exempt)** for all three tax categories. | | 0 (Exempt) |
|  | |  |
| Click . | |  |
| Back on the *Product* screen, navigate to the *Plants* area and click . On the *Plant* screen, in the *General Data* section, enter **MI00 (DC Miami)** for *Plant* and **Hand lift** for *Loading Group*. | | MI00  Hand lift |
|  | |  |
| Now go to the *Purchasing* area and enter **N00 (North America)** as the *Purchasing Group*. | | N00 |
|  | |  |
| Go to the *MRP Data* area and enter the*MRP Type* **PD (MRP)**, *the MRP Controller* **000** **(MI MRP Controller)**, and the *Availability Check* **02 (Individual Requirement)**. | | PD  000  02 |
|  | |  |
| In the *Lot-Size Data* section, enter **EX (Lot-for-lot order quantity)** as the *Lot-Sizing Procedure* and **10** as the *Minimum Lot Size*. | | EX  10 |
|  | |  |
| **Note** Some values in this view have three decimal places. Therefore, a minimum lot size of 10 is displayed as 10.000. | |  |
| In the *Procurement* section, for *Planned Delivery Time*, enter **6** (days). | | 6 |
|  | |  |
| Switch to the *Storage Locations* area and choose . | |  |
| On the *Plant – Storage Location* screen, enter **TG00** **(Trading Goods)** for the *Storage Location* field. Click . | | TG00 |
| On the *Product* screen, please navigate to the *Valuation Areas* area and click . On the *Valuation Area* screen, enter *Valuation Area* **MI00** and *Valuation Class* **3100 (Trading goods)**. | | MI00  3100 |
|  | |  |
| Go to the *Valuation* area and enter **33.50** USD as the *Inventory Price* and ensure that **Moving Average Price/Periodic Unit Price (V)** is selected for *Price Control*. | | 33.50 |
|  | |  |
| Click  and then click . Your material has now been created. | |  |
| Click on the home icon to go to the Fiori Launchpad Overview. | |  |
|  | |  |

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|  | Step 3: Change Material | |
| **Task** Extend a material master record.  **Description** Extend the distribution chain of the new trading goods (chain closure) to enable the San Diego plant to maintain another condition.  **Name (position)** Sergey Petrov (Warehouse Employee) | | **Time** 5 min |
|  | |  |
| To create new views for a trading good, please go to the *Materials Management* space. In the *Warehouse Employee* section, you can use the *Manage Product Master Data* app. | | Start |
|  | |  |
| Enter your material number **CHLK1###** (replace ### with your number) in the *Product* field and click . | | CHLK1### |
|  | |  |
| Click on the line with your material. | |  |
| On the *Product* screen, click . Navigate to the *Distribution Chains* area and click . | |  |
| On the *Distribution Chain* screen, in the *General Information* section, enter *Sales Organization* **UW00 (US West)**, *Distribution Channel* **WH (Wholesale)**, and *Delivery Plant* **SD00 (San Diego**). | | UW00  WH  SD00 |
| In the *Grouping Terms* area, choose **0001 (Make-to-order)** for the *Item Category Group*. | | 0001 |
| In the *Sales Tax* area, ensure that *Tax Classification* **0 (Exempt)** is entered for all three tax categories. | | 0 (Exempt) |
|  | |  |
| Click  and then click . | |  |
|  | |  |
| Finally, press  to get to the Fiori Launchpad Overview. | |  |
|  | |  |

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|  | Step 4: Display Stock | |
| **Task** Display the current stock.  **Description** View the current stock for your chain lock and the demand for this product. The report should show that there is no provision for this and therefore no lock is currently available.  **Name (position)** Wilton Saban (Inventory Supervisor) | | **Time** 5 min |
|  | |  |
| The stock is dynamic. As a result, it always changes when the affected material is used in a transaction. | | Stock |
|  | |  |
| To display the stock, go to the *Materials Management* space. In the *Inventory Supervisor* section, you can use the *Stock - Single Material* app. | | Start |
|  | |  |
| You will be directed to the following screen. | |  |
|  | |  |
| To find the material number of your chain lock, click in the *Material* field and then click . In the *Material* field, enter your number in the format **\*###**. Click  to search. Double-click your material CHLK1###. Your stock should look like this: | | \*### |
|  | |  |
| In the DC Miami row, in the *Stock History* column, click theicon. The system will now display the stock history of your material CHLK1### in DC Miami. | |  |
|  | |  |
| **Note** Since the material has just been created and no stocks have been posted yet, the stock history in all key figures is 0. | |  |
| Close the window and click the Home button  to return to the SAP Fiori launchpad. | |  |
|  | |  |

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|  | Step 5: Create Purchase Requisition | |
| **Task** Create a purchase requisition.  **Description** The sales management has informed the purchasing department that an advertising campaign is starting in 3 months to introduce the new chain lock. Create a demand (purchase requisition) for 200 of your locks so that you can choose the supplier that best meets your needs from any quotations.  **Name (position)** Wilton Saban (Inventory Supervisor) | | **Time** 5 min |
|  | |  |
| To create a purchase requisition, please go to the *Materials Management* space. In the *Inventory Supervisor* section, you can use the *Create Purchase Requisition* app. | | Start |
|  | |  |
| You should now see the following screen. | |  |
|  | |  |
| Click . | |  |
| Enter *Material* **CHLK1###** (## - replace with your number), press Enter. The Short Tex and Material Group will be added automatically. | | CHLK1### |
| Enter **32.00 USD** as the *Valuation Price*, **1** as the *Price Unit*, and **200** as the *Quantity Requested*. For the *Delivery Date*, you choose **today in** **3 months**. | | 32.00 USD  1  200  Today in 3 months |
| **Note** The requested quantity is displayed with three decimal places. Therefore, your 200 is displayed as 200.000. | |  |
|  | |  |
| At the very end, enter the following message under the Notes heading and on the *Item text* tab page:  “Global Bike formally requests quotations for the following material. Quotations will be accepted until [01. day of next month].“ | |  |
|  | |  |
| Click . In the upper right corner, you can see the item in the shopping cart. | |  |
|  | |  |
| Click  to view your requisition. | |  |
|  | |  |
| In the *Items* area, click on the line of the chain lock to add some details. | |  |
| In the *Item Details* view, enter **N00** as the *Purchasing Group*, **US00** as the *Purchasing Organization*, **US00** as the *Company Code*, and **MI00** as the *Plant*. | | N00  US00  US00  MI00 |
|  | |  |
| Click . Afterwards, click  and then choose  to confirm the request. The system creates a separate document number. | |  |
|  | |  |
| Close the notification and then click  to go to the SAP Fiori launchpad. | |  |
|  | |  |

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|  | Step 6: Manage Stock | |
| **Task** Manage the stock.  **Description** Display the stock/requirements list of your existing chain lock and check which requirements exist for this product.  **Name (position)** Alberto Conti (Inventory Assistant) | | **Time** 5 min |
|  | |  |
| Please go to the *Materials Management* space. In the *Inventory Assistant* section, you can use the *Stock (Single Material)* app to display the stock/requirements list. | | Start |
|  | |  |
| On the *Stock – Single Material* screen, in the *Material* field, enter your chain lock **CHLK1###**. Your warehouse/demand list should look similar to the screenshot below. | | CHLK1### |
| C:\Users\DWINDH~1\AppData\Local\Temp\SNAGHTMLa3b5f63.PNG | |  |
| In the DC Miami row, in the Stock History column, click the icon . | |  |
| The system will now display the stock history of your material CHLK1### in DC Miami. | |  |
|  | |  |
| **Note** As you can see, the creation of the purchase requisition has not influenced the stock development. | |  |
| Click  to go to the SAP Fiori launchpad | |  |
|  | |  |

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|  | Step 7: Create RFQ | |
| **Task** Create a request for quotation for your purchase requisition.  **Description** Create one request for each supplier. This is used to collect all relevant information (such as pricing, delivery, and so on) that is needed to select the supplier that best meets your requirements.  **Name (position)** Aura Maxwell (Purchasing Agent) | | **Time** 5 min |
|  | |  |
| To create a request for quotation for your purchase requisition, go to the *Materials Management* space. In the *Purchasing Agent* section, you can use the *Manage Purchase Requisitions* app | | Start |
|  | |  |
| In the *Search* field enter you material **CHLK1###** and click . | | CHLK1### |
|  | |  |
| Select the row with your Purchase Requisition and click . | |  |
| In the *Manage Purchase Requisitions* screenenter **Request for Quote** as *RFQ Type*,**RFQ1###** as *RFQ Description,* **one month from today** as the *Quotation Deadline,* **US00**for the *Purchasing Organization* and *Company Code.* | | Request for Quote  RFQ1###  One month from today  US00  US00 |
|  | |  |
| In the *Bidders* area click on  to add a new bidder. | |  |
| Search for your supplier **Mid-West Supply ###**. Select the entry with your supplier and click  to add them as bidder. | | Mid-West Supply ### |
|  | |  |
| Repeat this procedure to add the suppliers **Dallas Bike Basics** and **Spy Gear** as bidders. | | Dallas Bike Basic  Spy Gear |
| **Note** You recognize your supplier by the last three digits of the supplier number. For example, supplier number 103**000** represents supplier Dallas Bike Basics for user LEARN-**000**. | |  |
|  | |  |
| Note that in the *Items* sectionyour purchase requisition was added. | |  |
|  | |  |
| Click  and confirm the pop up with . | |  |
| You will get a success message. | |  |
|  | |  |
| Close the pop up and click  to go to the SAP Fiori launchpad. | |  |
|  | |  |

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|  | Step 8: Create Quotation from Vendor | |
| **Task** Maintain the quotation from a supplier.  **Description** After we receiving responses to our purchase requisition from our suppliers, it is necessary to maintain the respective information in our procurement system in order to create comparability with which we can support the choice of supplier.  **Name (position)** Alberto Conti (Inventory Assistant) | | **Time** 10 min |
|  | |  |
| Go to the *Materials Management* space. In the *Inventory Assistant* section, you can use the *Manage RFQs* app to create a request for quotation for your purchase requisition. If the app is missing in this section, please search it with the help of the search bar in the upper screen area. | | Start |
|  | |  |
| In the *Search* field enter **RFQ1###** and click . | | RFQ1### |
|  | |  |
| Click on the row with your Request for Quote. Go to the *Bidder* area. Select your bidder Mid-West Supply ### and click  to create a quotation. | |  |
|  | |  |
| In the *Supplier Quotation* window enter **three weeks from today** as *Quotation Submission Date*. | | Three weeks from today |
| **Note** The submission date must not be after the end of the bid period. You can find the quotation deadline unter *general Information.* | |  |
|  | |  |
| In the *Items* are enter **32.00** USD as *Net Order Price.* | | 32.00 |
|  | |  |
| Click  to create the Quotation. Click  to submit the Quotation. If you don't see the Submit button, enlarge your browser window. | |  |
|  | |  |
| Click  to return to the *Request for Quotation* window. The quotation from your supplier Mid-West Supply ### can now be found in the *Quotations* area. | |  |
| Repeat this process for the other two bidders. Enter the following prices:  Dallas Bike Basics **36.50** USD  Spy Gear **35.00** USD  Make sure you save both requests and take note of the success messages. | | Dallas Bike Basics  36.50  Spy Gear  35.00 |
|  | |  |
| Click  to go to the SAP Fiori launchpad. Confirm any notes by choosing OK. | |  |
|  | |  |

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|  | Step 9: Price Based Bid Evaluation | |
| **Task** Evaluate the quotes based on the price. Reject two of the three offers.  **Description** Generate a quotation price comparison list from the quotations from the individual vendors. The quotation price comparison list sorts the quotations from lowest to highest.  The successful vendor (Mid-West Supply) was selected using the criterion of the most favorable quotation. It is now necessary to inform the subordinate providers of the rejection of their offers.  **Name (position)** Wilton Saban (Inventory Supervisor) | | **Time** 5 min |
|  | |  |
| Go to the *Materials Management* space. In the *Inventory Assistant* section, you can use the C*ompare Supplier Quotations* app to reject a quotation. If the app is missing in this section, please search it with the help of the search bar in the upper screen area. | | Start |
|  | |  |
| Search for your Request for Quotation by using the **F4 help**. Enter the **RFQ1###** as *RFQ Description* and click . | | RFQ1### |
|  | |  |
| Select your RFQ. | |  |
|  | |  |
| Compare the quotes and select the best one, in this case the quotation from Mid-West Supply ###. Choose the beste Quote and click . | |  |
| **Note** For the best offer the *Total Quotation Net Value* is highlighted in green. | |  |
| Reject the other two offers. To do this click on the Supplier Qutation number and the on **Manage Supplier Quotation**. | |  |
|  | |  |
| In the *Supplier Quotation* window click on  (top right). | |  |
| **Note** Ifyour browser window is to small, the *Complete* button will be hidden under . | |  |
| Click  to return to the *Compare Supplier Quotations* window. | |  |
| Repeat this procedure to also reject the second quotation. | |  |
| Click  to go to the SAP Fiori launchpad. Confirm any notes by choosing OK. | |  |
|  | |  |

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|  | Step 10: Create Purchase Order Referencing an RFQ | |
| **Task** Create a purchase order with reference to a request for quotation.  **Description** Create a purchase order that refers to the successful supplier's quote. The details are then imported into the new purchase order.  **Name (position)** Aura Maxwell (Purchasing Agent) | | **Time** 15 min |
|  | |  |
| Go to the *Materials Management* space. There, you can use the *Manage RFQs* app to create a request for quotation for your purchase requisition. If the app is missing in this section, please search it with the help of the search bar in the upper screen area. | | Start |
|  | |  |
| In the *search field* enter **RFQ1###** and click . | | RFQ1### |
|  | |  |
| Open your RFQ and go to the *Process Flow* area. | |  |
|  | |  |
| You see your purchase requisition followed by the associated RFQ and the three supplier quotations. Two of the three offers have already been rejected, as indicated by the comment completed. | |  |
| Click on the Supplier Quotation with the comment  and then on . | |  |
|  | |  |
| To create a purchase order from the quotation click in the *Supplier Quotation* window on  and then on . | |  |
|  | |  |
| In the *Purchase Order* go to the *Purchase Order Items* area you see one entry with your CHLK1### material. | |  |
| We want to split the delivery in two partial deliverys. Change the *Order Quantity*from 200 to **100**. Select the entry and click . | | 200🡪 100 |
| In the *Purchase Order Item* screen go to the *Schedule Lines* area and change the *Delivery Date* to **one week later**. | | 1 week after 1st delivery |
|  | |  |
| Click on . | |  |
|  | |  |
| Back in the *Purchase Order Item* window click on . | |  |
| **Note** A purchase order is a formal request to a vendor to deliver goods or services according to the conditions of the purchase order. Several objects can trigger a purchase order (see graphic).    Goods receipt and invoice verification are usually based on the purchase order. | |  |
| Click  until you have returned to the *Request for Quotation* screen. Take another look at the *Process Flow*. The Quotation is now followed by a purchase order. | |  |
|  | |  |
| Click  to go to the SAP Fiori launchpad. Confirm any notes by choosing OK. | |  |
|  | |  |

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| --- | --- | --- |
|  | Step 11: Display Purchase Order | |
| **Task** Display your purchase order.  **Description** You now want to look in the system at what you have sent to the vendor.  **Name (position)** Aura Maxwell (Purchasing Agent 2) | | **Time** 5 min |
|  | |  |
| To display the purchase order, please go to the *Materials Management* space. In the *Purchasing Agent* section, you can use *My Purchasing Document Items (Professional)* app. | | Start |
|  | |  |
| The app provides you with an overview of all purchase requisitions, purchase orders, goods receipts, and supplier invoices. In the *Supplier* field, enter **Mid-West Supply ###** and choose . | | Mid-West Supply ### |
|  | |  |
| Click . The number you see may be different. You may need to scroll down to see your supplier and purchase order. | |  |
|  | |  |
| Click  to go to the SAP Fiori launchpad. | |  |
|  | |  |

|  |  |  |
| --- | --- | --- |
|  | Step 12: Post Goods Receipt for Purchase Order | |
| **Task** Create a goods receipt posting for your purchase order.  **Description** You receive the goods that you ordered in the previous step from Mid-West Supply into your inventory. A goods receipt posting is created that refers to your purchase order. The stock is increased and a financial document is created that posts the value of the goods correctly.  **Name (position)** Tatiana Karsova (Goods Receipt Clerk) | | **Time** 5 min |
|  | |  |
| To post the goods receipt, please go to the *Materials Management* space. In the *Goods Receipt Clerk* section, you can use the *Post Goods Receipt for Purchasing Document* app. | | Start |
|  | |  |
| Enter **your purchasing document number** in the *Purchasing Document* field. If you want to search for your purchasing document number, use the **F4 help**. In the search field, enter **CHLK1###** and then click . | | Your purchase order number  CHLK1### |
|  | |  |
| Then select the **first of your** **purchase orders** by double-clicking it. You can now see your subdivided purchase order. | | First of your orders |
| **Note** If goods are delivered for a purchase order, document a goods receipt with reference to the purchase order. The system checks the purchase order and copies only the open purchase order items to the goods receipt transaction.    For goods receipt with reference to a purchase order, the system checks the following:   * Whether the correct material was delivered. * Whether the correct quantity was delivered. (If there is no surplus or underdelivery) * Whether perishable goods are within their minimum shelf life. (In this case, the shelf life expiration date check must be activated.) | |  |
| For *Printing*, select **Individual slip**. If it is not filled automatically, select **TG00 (Trading Goods)** in the individual items for *storage location*. | | Individual slip  TG00 |
|  | |  |
| Since you have split your purchase order, you should see two lines with 100 pieces. In this step, we only process the first delivery. Therefore, click on the first row to check all entries. | |  |
| Select the **Delivery** **Completed** checkbox. | | X |
| Check that **Tradings Goods** is entered as the *storage location* and change the *stock type* to **Quality Inspection**. | | Trading goods  Quality Inspection |
|  | |  |
| Now click . | |  |
| Note Inventory Management recognizes various stock types that indicate the usability of the material:   * unrestricted-use stock * Stock in quality inspection * blocked stock     For goods receipts, you decide to which stock type a quantity is posted. The stock type is relevant for determining the available stock in material requirements planning (MRP) and for withdrawals in inventory management (see also Availability Check).  You can only post withdrawals for consumption from unrestricted-use stock. From quality inspection stock and blocked stock, you can only withdraw a sample, scrap a quantity, or post an inventory difference. | |  |
| Leave the first line selected. Click *Post* to post the goods receipt of your material. You receive the following success message with your material document number. | |  |
|  | |  |
| **Note** When you post a goods receipt into one of the warehouses, the system generates a material document. This document contains information about the delivered material and the corresponding quantity. For stock items, the plant storage location is documented. | |  |
| Close the message and click  to go to the SAP Fiori launchpad. | |  |
|  | |  |

|  |  |  |
| --- | --- | --- |
|  | Step 13: Check Received Goods | |
| **Task** Check the quality of the goods.  **Description** You must ensure that the goods have been delivered in the required quality. The goods are released for consumption.  **Name (position)** Sandeep Die (Warehouse Supervisor) | | **Time** 5 min |
|  | |  |
| Please go to the *Materials Management* space. In the *Warehouse Supervisor* section, you can use the *Stock (Single Material)* app to perform a quality inspection of the goods. | | Start |
|  | |  |
| If it is not already selected, enter your material **CHLK1###**. A list is displayed. Click your material **CHLK1###**. | | CHLK1### |
|  | |  |
| In the previous step, you posted the received goods for quality inspection. Here you can see the 100 units of quality inspection stock. | |  |
|  | |  |
| You can only remove goods from unrestricted-use stock for consumption. Therefore, you have to transfer post the goods. | |  |
| **Note** In reality, you would check whether the correct goods and quantity were delivered before posting them to unrestricted-use stock. | |  |
| Select the row for *Storage Location* **Trading Goods** in the plant in Miami and click . | |  |
|  | |  |
| In the *Stock in Quality Inspection* column, click , next to the 100 units. The icon under *Unrestricted use stock* is now clickable. Click . | |  |
| In the *Transfer Stock – In-Plant* window, increase the quantity to **100**. | | 100 |
|  | |  |
| Click . You receive a success message. The material has been transferred. | |  |
|  | |  |
| Close the message and click  to go to the SAP Fiori launchpad. | |  |
|  | |  |

|  |  |  |
| --- | --- | --- |
|  | Step 14: Check Physical Goods Receipt | |
| **Task** Confirm the physical receipt of the goods.  **Description** View the inventory of chain locks again. The stock overview gives you an overview of the stocks of a material across all organizational levels.  **Name (position)** Tatiana Karsova (Goods Receipt Clerk) | | **Time** 5 min |
|  | |  |
| To check the stock level of a material, go to the *Materials Management* space. In the *Goods Receipt Clerk* section, you can use the *Manage Stock* app. | | Start |
|  | |  |
| From the drop down menu, choose the DC Miami (**MI00**). To find the material number from your chain lock, click in the Material field and then click the value help icon. | | MI00 |
| In the Search field, enter **\*###** (for example, if your number is 002, enter \*002). | | \*### |
|  | |  |
| Click  to display the list of materials. Extend the Material Short Text field. Scroll down until you find your material **CHLK1###**. | | CHLK1### |
|  | |  |
| Double click on it. The report shows you the storage level for the DC in Miami. | |  |
|  | |  |
| You can find out more details about the stock of the chain lock. To do so, click . This will give you detailed information about the stock of the chain lock in the different plants. | |  |
|  | |  |
| Click on the icon  at the DC Miami (MI00) plant to see detailed information about the stock of the chain lock in Miami. On the following screen, you can see a graphical overview. | |  |
|  | |  |
| Click  to go to the SAP Fiori launchpad. | |  |
|  | |  |

|  |  |  |
| --- | --- | --- |
|  | Step 15: Create and Post the First Supplier Invoice | |
| **Task** Create a supplier invoice.  **Description** Create a supplier invoice from Mid-West Supply for 3,200.00 USD for the current purchase order and the received goods. This invoice is assigned to an existing expense account in the general ledger of your chart of accounts and saved as a payable to Mid-West Supply. To facilitate data entry in the general ledger, the invoice is shown below.  lieferantenrechnung mm en-page-002  CHLK1### Chain Close  **Name (position)** Silvia Cassano (AP Accountant) | | **Time** 5 min |
|  | |  |
| To create a supplier invoice, please go to the *Materials Management* space. In the *AP Accountant* section, you can use the *Create Supplier Invoice* app. | | Start |
|  | |  |
| On the Create Supplier Invoice screen, enter **today’s date** as the *Invoice Date*. Check your *company code* **US00**. Enter the amount of the above invoice (**3,200.00**) in the *Gross Invoice Amount* field. Now enter **INVOICE00504-###** as *Reference*. | | Today's date  US00  3,200.00  INVOICE00504-### |
|  | |  |
| Go to the tab *Purchasing Document References*. | |  |
| Now enter (or search for) the **number of your purchase order** in the*Purchase Order/Scheduling Agreement* field. Then press Enter. The Invoicing Party field has now been automatically filled with the number of your vendor. | | Your purchase order number |
|  | |  |
| For the first invoice item, enter **XI** as *Tax Code* and **TX0000000** as *Tax Jurisdiction*. | | XI  TX0000000 |
| Scroll back to the top of the page. As you can see, the balance is 0.00 USD. | |  |
|  | |  |
| Then press  to verify that your postings are correct. | |  |
|  | |  |
| Finally, press . The system will generate a unique supplier invoice number. | |  |
|  | |  |
| Close the message with No to return to the SAP Fiori launchpad. | |  |
|  | |  |

|  |  |  |
| --- | --- | --- |
|  | Step 16: Display Purchase Order History | |
| **Task** Display the purchase order history.  **Description** Review the status of your order of the chain locks. Due to the first transaction that was carried out for your purchase order number, the Purchase Order Processing tab page is now available in the purchase order.  **Name (position)** Wilton Saban (Inventory Supervisor) | | **Time** 5 min |
|  | |  |
| To display the purchase order history, go to the *Materials Management* space. In the *Inventory Supervisor* section, you can use *My Purchasing Document Items (Professional)* app. | | Start |
|  | |  |
| The app provides you with an overview of all purchase requisitions, purchase orders, goods receipts, and supplier invoices. In the *Supplier* field, enter your vendor **Mid-West Supply ###.** | | Mid-West Supply ### |
|  | |  |
| Choose  and then choose the tab page . You may need to scroll down to see your supplier and purchase order. | |  |
| In the Purchase Order Items area, click  and select the *Delivered Quantity* and *Delivered Amount* columnsin the *View Settings* dialog box*.* | |  |
|  | |  |
| Click . As you can see, the first item of the purchase order has been delivered for a delivery value of 3,200 USD. | |  |
|  | |  |
| Now choose the tab page . You can see the 100 delivered chain locks. You see the material document that was created in the system when you confirmed the goods receipt. | |  |
|  | |  |
| On the Supplier Invoice tab, you can see further activities that have been carried out with reference to your purchase order. Click . | |  |
|  | |  |
| The invoice has been created. Click on the invoice line of your chain lock. This will take you to the financial document that was created when you created the supplier invoice. | |  |
|  | |  |
| Click  to go to the SAP Fiori launchpad. | |  |
|  | |  |

|  |  |  |
| --- | --- | --- |
|  | Step 17: Display Document Flow | |
| **Task** Display the document flow.  **Description** Check the goods receipt document and the document flow of your material.  **Name (position)** Wilton Saban (Inventory Supervisor) | | **Time** 5 min |
|  | |  |
| To display the history of documents, please go to the *Materials Management* space. In the *Inventory Supervisor* section, you can use the *Material Documents Overview* app. | | Start |
|  | |  |
| The app provides an overview of material documents. You can find your purchase order by using the assigned number. To do this, enter your material number **CHLK1###** in the *Material* field. If the search fields are not displayed in your system, first click to expand the search fields. | | CHLK1### |
|  | |  |
| After entering the search term, click . Then click Settings. In the *view settings*, activate the **Stock Type (Transfer)** column. Confirm with. | | Stock Type (Stock Transfer) |
| A new material document is created for each material movement. You see two material documents with your material CHLK###. One is the document for the goods receipt into inspection stock. You also see a document that was generated by the transfer posting of the material to unrestricted-use stock. | |  |
|  | |  |
| Identify the line with the Stock Type (Transfer): Unrestricted-Use Stock. | |  |
|  | |  |
| Click on this line. You can now see the general information for the document from the step in which you confirmed the goods receipt. | |  |
|  | |  |
| Click the *Process Flow* tab. In the process flow, you can see the transfer posting of the material from stock to quality inspection to unrestricted-use stock. | |  |
|  | |  |
| Click  to go to the SAP Fiori launchpad. | |  |
|  | |  |

|  |  |  |
| --- | --- | --- |
|  | Step 18: Post Goods Receipt for Purchase Order | |
| **Task** Post a Goods Receipt for a Purchase Order.  **Description** You receive the missing goods that you ordered from Mid-West Supply into your warehouse. A goods receipt posting is created that refers to your purchase order. This ensures that you have received the ordered goods within the expected time and in the required quality. The stock is increased and a financial document is created that posts the value of the goods correctly.  **Name (position)** Tatiana Karsova (Goods Receipt Clerk) | | **Time** 5 min |
|  | |  |
| To post the goods receipt, please go to the *Materials Management* space. In the *Goods Receipt Clerk* section, you can use *Post Goods Receipt for Purchasing Document* app. | | Start |
|  | |  |
| The *Post Goods Receipt for Purchasing Document* window appears. | |  |
|  | |  |
| Choose the **F4 help** in the *Purchasing Document* field. | |  |
| Enter your number \*### and click . Search for your material **CHLK1###**. You can see that you no longer see two purchase orders but only one open purchase order for your material. | | \*### |
|  | |  |
| Double-click the purchase order. The following screen appears. On the "Items" tab page, you should see only one row. | |  |
|  | |  |
| Make sure that for *Storage Location* **TG00 (Trading Goods)** and for *Stock Type* **Unrestricted use** is selected. | | TG00  Unrestricted Use |
| **Note** In step 12, you first posted the goods in quality inspection and then inspected them later. In this scenario, you inspect the goods directly at goods receipt so that you can use them directly. | |  |
| Click on the item line of your chain lock to check all entries. Select the **Delivery** **Completed** checkbox. | | Delivery Completed |
|  | |  |
| Now click . Select the line and click . You receive the following success message with your material document number. | |  |
|  | |  |
| Close the messafe and click  to go to the SAP Fiori launchpad. | |  |
|  | |  |

|  |  |  |
| --- | --- | --- |
|  | Step 19: Check Physical Goods Receipt | |
| **Task** Confirm the physical receipt of the goods.  **Description** View the inventory of chain locks again. The stock overview gives you an overview of the stocks of a material across all organizational levels.  **Name (position)** Tatiana Karsova (Goods Receipt Clerk) | | **Time** 5 min |
|  | |  |
| To check the stock level of a material, go to the *Materials Management* space. In the *Goods Receipt Clerk* section, you can use the *Manage Stock* app. | | Start |
|  | |  |
| From the drop down menu, choose the Miami *plant* **DC Miami** (**MI00**). To find the material number from your chain lock, click in the Material field and then click the value help icon. | | MI00 |
| In the Search field, enter **\*###** (for example, if your number is 002, enter \*002). Click  to display the list of materials. | | \*### |
| Scroll down until you find your material **CHLK1###**. Double click on it. | | CHLK1### |
|  | |  |
| Since in the previous step the goods receipt was posted directly to unrestricted stock, you can see that the stock in this category has increased from 100 to 200. | |  |
| You can find out more details about the stock of the chain lock. To do so, click . This will give you detailed information about the stock of the chain lock in the different plants. | |  |
|  | |  |
| Click  to display the stock history for plant DC Miami (MI00) graphically. You can now see a graphical overview. | |  |
|  | |  |
| Since you currently only have unrestricted-use stocks, the key figures are set to 0. | |  |
| Close and then click  to go to the SAP Fiori launchpad. | |  |
|  | |  |

|  |  |  |
| --- | --- | --- |
|  | Step 20: Create and Post the Second Supplier Invoice | |
| **Task** Create a supplier invoice.  **Description** Create a supplier invoice from Mid-West Supply for USD 3,200.00 for the second partial delivery and the received goods. This invoice is also assigned to an existing expense account in the general ledger of your chart of accounts and saved as a payable to Mid-West Supply. Later, a check is issued for Mid-West Supply. To facilitate data entry in the general ledger, the invoice is shown below.    CHLK1### Chain Lock  **Name (position)** Silvia Cassano (AP Accountant) | | **Time** 5 min |
|  | |  |
| To create a supplier invoice, please go to the *Materials Management* space. In the *AP Accountant* section, you can use the *Create Supplier Invoice* app. | | Start |
|  | |  |
| On the *Create Supplier Invoice* screen, enter **today’s date** as the *Invoice Date*. Verify that *company code* **US00** is selected. In the *Gross Amount* field, enter the amount of the invoice above (**3,200.00**). Enter **INVOICE00515-###** as the *reference*. | | Today's date  US00  3,200.00  INVOICE00515-### |
|  | |  |
| Choose the *Purchasing Document References* tab. | |  |
| Now enter (or search for) the **number of your purchase order in the Purchase Order**/Scheduling Agreement field. Then press Enter. The Invoicing Party field has now been automatically filled with the number of your vendor. | | Your purchase order number |
|  | |  |
| For the second item, enter **XI** as *Tax Code* and **TX0000000** as *Tax Jurisdiction*. | | XI  TX0000000 |
|  | |  |
| In the document header, you can see that the balance is 0.00. | |  |
|  | |  |
| Then press  to verify that your postings are correct. | |  |
|  | |  |
| Finally, press  and then No. The system will generate a unique supplier invoice number. | |  |
|  | |  |
| Click *No* to go to the SAP Fiori launchpad. | |  |
|  | |  |

|  |  |  |
| --- | --- | --- |
|  | Step 21: Post Outgoing Payment | |
| **Task** Post the payments to a supplier.  **Description** Issue a payment to your supplier Mid-West Supply to pay your payables. Note that the total amount is for both of your invoices. The created posting will clear the liability from your bank account.  **Name (position)** Silvia Cassano (AP Accountant) | | **Time** 5 min |
|  | |  |
| To post the payment to a supplier, go to the *Materials Management* space. In the *AP Accountant* section, you can use the *Post Outgoing Payments* app. | | Start |
|  | |  |
| On the *Post Outgoing Payments* screen, choose Global Bike Inc. as the *company code* (**US00**). For *Posting Date* and *Journal Entry Date* enter **today’s date**, for Reference **INVOICES ###**, and the **current period**. For *G/L account*, enter **1810000** (Bank 1) and the *Amount* **6,400.00** **USD**. | | US00  Current Date  INVOICES ###  Current Period  1810000  6,400.00 USD |
| Ensure that the journal entry type **KZ (Vendor Payment)** is selected. Use the following screenshot to check your entries. | | KZ (Vendor Payment) |
|  | |  |
| Under *Open Item Selection*, enter your supplier number for **Mid-West Supply** as the account (if necessary, use the F4 help). | | Mid-West Supply |
| Click . On the upper right, you can see that the open balance is USD 6,400.00. | |  |
|  | |  |
| On the *Open Items* tab page, you see the two split deliveries. | |  |
|  | |  |
| Since you want to pay both bills together, choose the button  in both lines. Note that both items have been cleared. | |  |
|  | |  |
| The open balance is now USD 0.00. | |  |
| Press  to post your payments to Mid-West Supply. The system will assign a unique document number to your supplier payment. | |  |
|  | |  |
| Press Display and click  to go to the SAP Fiori launchpad. Confirm any error messages. | |  |
|  | |  |

|  |  |  |
| --- | --- | --- |
|  | Step 22: Display Vendor Balance | |
| **Task** Display the balances of a vendor.  **Description** View and confirm the activities and related balances related to your Mid-West Supply vendor. You should see a debit posting and a credit posting that were generated by the two invoices and the output of a single payment to settle the payables to Mid-West Supply.  **Name (position)** Shuyuan Chen (Head of Accounting) | | **Time** 5 min |
|  | |  |
| To display the balances of a vendor, please go to the *Materials Management* space. In the *Head of Accounting* section, you can use the *Display Supplier Balances* app. | | Start |
|  | |  |
| Use the **F4 help** in the *Supplier* field to find the number of your supplier. In the Search Term field, enter your number **###** and press . | | ### |
| Scroll until you find your vendor **Mid-West** **Supply**. Select the entry. | | Mid-West Supply |
|  | |  |
| Confirm with . Back on the Display *Supplier Balances screen,* choose **US00** as the company code and **the current year** as the fiscal year. | | US00  Current Year |
|  | |  |
| Then choose  to display the balances. You get a similar overview. | |  |
|  | |  |
| Click  to go to the SAP Fiori launchpad. | |  |
|  | |  |

|  |  |  |
| --- | --- | --- |
|  | Step 23: Display Purchase Order History | |
| **Task** Display the purchase order history.  **Description** Review the status of your order of the chain locks. The Purchase Order History tab page has been updated as a result of further postings.  **Name (position)** Wilton Saban (Inventory Supervisor) | | **Time** 5 min |
|  | |  |
| To display the purchase order history, go to the *Materials Management* space. In the *Inventory Supervisor* section, you can use *My Purchasing Document Items (Professional)* app. | | Start |
|  | |  |
| The app provides you with an overview of all purchase requisitions, purchase orders, goods receipts, and supplier invoices. | |  |
| In the Supplier field, enter the number of your supplier Mid-West Supply ### and choose . | | Mid-West Supply ### |
|  | |  |
| Click . You may need to scroll down to see your supplier and purchase order. | |  |
|  | |  |
| As you can see, no more open quantities are displayed under Next Delivery Quantity. | |  |
| Click. You see the other 100 delivered chain locks. You also see the material document that was created in the system when you confirmed the goods receipt. | |  |
|  | |  |
| In the Supplier Invoice Overview, you can see further activities that have been performed with reference to your purchase order. | |  |
| Click . Both invoices have been created and have the status Posted. | |  |
|  | |  |
| To display more information about the documents, you can click on the relevant row. This will take you to the financial document that was created when you created the supplier invoice. | |  |
| Click  to go to the SAP Fiori launchpad. | |  |
|  | |  |

|  |  |  |
| --- | --- | --- |
|  | Step 24: Display Balance List and Line Item List | |
| **Task** Display the balance and line item list of the general ledger.  **Description** Use G/L account numbers to display the activities and related balances for some accounts in your general ledger.  **Name (position)** Shuyuan Chen (Head of Accounting) | | **Time** 5 min |
|  | |  |
| To display the balance and line item list, please go to the *Materials Management* space. In the *Head of Accounting* section, you can use the *Balance Sheet/Income Statement* app. | | Start |
|  | |  |
| In the *Display Financial Statement* screen, enter **US00** (Global Bike Inc.) for Company Code, **0L** for Ledger, and **G000** for Financial Statement Version. Make sure that the Balance Sheet Type is **Normal (Actual - Actual)** and End Period is **current period/year** and Comparison Period is **1/2016**. Compare your screen with the following screenshot. | | US00  0L  G000  Normal (Actual – Actual)  Current Period/Year  1/2016 |
|  | |  |
| Choose . In the view, you can see all items of the accounts of Global Bike in the United States. | |  |
|  | |  |
| **Note** Since all participants in your course are posting to the same US bank account, the number you see next to the bank account 1810000 used is different. | |  |
|  | |  |
| Click  to go to the SAP Fiori launchpad. | |  |
|  | |  |

|  |  |  |
| --- | --- | --- |
|  | MM Challenge | |
| **Learning objective** Understand and execute a Materials Management process. | | **Time** 80min |
| **Motivation** After you have successfully completed the Materials Management case study, you should be able to solve the following task independently.  **Scenario** A new chain lock*, Chain Lock Security Pro ###* (DE: Kettenschloss Security Pro ###), is available on the market and we would like to include it in our inventory. The new chain lock with material number CHSP1### consists of a higher quality steel than the previous chain lock (CHLK1###), but the old one can still be used as a template because it has the same properties. The new material is intended for plant MI00, sales organization UE00, and distribution channel WH. With modern production techniques, the new material CHSP1### is also offered more cheaply by the suppliers. Global Bike Inc. passes the savings on to its customers. Maintain the chain lock in Sales and Distribution with the price condition 50.00 USD per chain lock. Request offers for 300 chain locks of security pro with a valuation price of 25.50 USD. Based on your request of 300 pieces, *Boomtown Tire & Wheel* is offering 26.00 USD per piece and *Space Bike Composites* of 25.50 USD per piece. Enter both quotations and accept the best quotation and order the requested 300 chain locks. Process the inbound delivery and enter the incoming invoice. You then pay for the delivery.  **Note** Since this task is based on the Materials Management case study, you can use this as a guide. However, we recommend that you carry out this continuing task without assistance in order to test your acquired knowledge. | | |
|  | |  |
|  | | |