|  |  |
| --- | --- |
| Example of an illustration | Test Script  SAP S/4HANA - 15-09-23 |
|  | Sales Quotation (BDG\_DE) |
|  | **SAP Logo**PUBLIC |

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# Purpose

This process describes the creation of a standard sales quotation.

This scope item starts when requests for quotations are received from customers. Quotations are created in the system, and can be either accepted or rejected by customers. In addition, you can use quotation workflow functionality flexibly.

This document provides a detailed procedure for testing this scope item after solution activation, reflecting the predefined scope of the solution. Each process step, report, or item is covered in its own section, providing the system interactions (test steps) in a table view. Steps that are not in scope of the process but are needed for testing are marked accordingly. Project-specific steps must be added.

|  |
| --- |
| Note Values in this test script (decimal notation, date formats, and so on) are presented in U.S. standard notation. If your test system is set up to use a different notation, enter values as appropriate. |

# Prerequisites

This section summarizes all the prerequisites for conducting the test in terms of systems, users, master data, organizational data, other test data and business conditions.

## System Access

|  |  |
| --- | --- |
| System | Details |
| System | Accessible via SAP Fiori launchpad. Your system administrator provides you with the URL to access the various apps assigned to your role. |

## Roles

Assign the following business roles to your individual test users. Alternatively, if available, you can create business roles using the following spaces with pages and predefined apps for the SAP Fiori launchpad and assign the business roles to your individual test users.

|  |
| --- |
| Note These roles or spaces are examples provided by SAP. You can use them as templates to create your own roles or spaces.  For more information about business roles, refer to Assigning business roles to a user in the [Administration Guide to Implementation of SAP S/4HANA with SAP Best Practices](https://help.sap.com/docs/SAP_S4HANA_ON-PREMISE/4cef93946a0b48ec89533b3c34443b85/17d958a88d244ee293aed687f9bfe37f.html?version=S4HANA2023). |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name (Role) | ID (Role) | Name (Launchpad Space) | ID (Launchpad Space) |  |
| Business Process Specialist | SAP\_BR\_BUSINESS\_PROCESS\_SPEC |  |  |  |
| Configuration Expert - Business Process Configuration | SAP\_BR\_BPC\_EXPERT |  |  |  |
| Administrator | SAP\_BR\_ADMINISTRATOR |  |  |  |
| Internal Sales Representative | SAP\_BR\_INTERNAL\_SALES\_REP | Internal Sales | SAP\_SD\_SP\_INTERNAL\_SALES |  |
| Sales Manager | SAP\_BR\_SALES\_MANAGER | Sales Management | SAP\_SD\_SP\_SALES\_MANAGER |  |

## Master Data, Organizational Data, and Other Data

The organizational structure and master data of your company has been created in your system during activation. The organizational structure reflects the structure of your company. The master data represents materials, customers, and vendors, for example, depending on the operational focus of your company.

Use your own master data or the following sample data to go through the test procedure.

|  |  |  |  |
| --- | --- | --- | --- |
| Data | Sample Value | Details | Comments |
| Material | TG10 | Trad.Good 10,PD,Third Party  Trading Good for regular Trading (MRP planning) with item category group CBOR.  no Serial no.; no batch |  |
| Material | TG11 | Trading Good for Reg. Trading (MRP planning)  no Serial no.; no batch | Substituted material: C01\_MD. |
| Material | TG12 | Trading Good for Reg. Trading (reorder point planning)  no Serial no.; no batch | Substituted material: C02\_MD. |
| Material | TG13 | Trad.Good 13,Reorder Point,Thrd Party  Trading Good for Regular Trading (reorder point planning) with item category group CBNA.  no batch |  |
| Material | TG14 | Trad.Good 14,PD,Bought-In,H14  Trading material with item category group CBUK (Reorder point planning, bought in item).  no batch |  |
| Material | TG21 | Trad.Good 21,Reorder Point,Batch-FIFO  no Serial no.; batch-controlled (FIFO strategy) | Only use if you have activated the building block Batch Management (BLG) (BLH)(BLJ).  Substituted material: C03\_MD |
| Material | TG22 | Trad.Good 22,Reorder Point,Batch-ExpD  no Serial no.; batch-controlled (Exp. Date) | Only use if you have activated the building block Batch Management (BLG) (BLH)(BLJ).  Substituted material: C04\_MD |
| Material | SM0001 | Service Material 01 |  |
| Material | NS0002 | Non-Stock Material 02 |  |
| Material | CM-FL-V00 | Forklift | Only use if you have activated the scope item Make-to-Order Production with Variant Configuration (1YT). |
| Sold-to party | 10100001 | Domestic DE Customer 1 |  |
| Ship-to party | 10100001 | Domestic DE Customer 1 |  |
| Payer | 10100001 | Domestic DE Customer 1 |  |
| Plant | 1010 | Plant 1 DE |  |
| Storage Location | 101A | Std. storage 1 |  |
| Shipping Point | 1010 | Shipping Point 1010 |  |
| Sales organization | 1010 | Dom. Sales Org |  |
| Distribution channel | 10 | Direct Sales |  |
| Division | 00 | Product Division 00 |  |

For more information on creating master data objects, see the following [Master Data Scripts (MDS)](https://help.sap.com/docs/s4hana-best-practices/s4hana2023-master-data)

Table 1: Master Data Script Reference

|  |  |
| --- | --- |
| Master Data ID | Description |
| BNF | Create Product Master of Type "Trading Good" |
| BND | Create Customer Master |

## Preliminary Steps

### Preliminary Steps for Quotation Approval (Optional)

#### Define and Assign Approval Reasons

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

This process step shows you how to define and assign approval reasons.

Procedure

Complete all steps in Define and Assign Reasons for Approval Requests to Enable SD Approval Workflow section via link [Administration Guide to Implementation of SAP S/4HANA with SAP Best Practices](https://help.sap.com/docs/SAP_S4HANA_ON-PREMISE/4cef93946a0b48ec89533b3c34443b85/17d958a88d244ee293aed687f9bfe37f.html?version=S4HANA2023).

#### Implement Cloud BAdI

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

The Business Add-In (BAdI) SD\_APM\_SET\_APPROVAL\_REASON is called whenever a sales document is saved by a business user. It determines whether a sales document needs to be sent to an approver and, if so, set an approval request reason on sales document header level.

This means that if you want to use the workflow for the approval of sales documents, implementing this BAdI is a prerequisite. In the Manage Sales Document Workflows app, you define additional preconditions and approval steps.

When the system sets an approval request reason for a sales document, the approval workflow is triggered automatically.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log On | Log on to the SAP Fiori launchpad as an Administrator. | The SAP Fiori launchpad displays. |  |
| 2 | Access the App | Open  Custom Logic (F1481). | The Custom Fields and Logic screen displays. |  |
| 3 | Navigate to Custom Logic | In the menu bar at the top, choose Custom Logic. | The Enhancement Implementations section displays. |  |
| 4 | Create Enhancement Implementation | Choose Create.  Make the following entries and choose Create:   * Business Context: Sales: Sales Document * BADI Description: Set Approval Request Reasons for Sales Documents * Implementation Description: for example, Set Approval Reason for Sales Documents * Implementation ID: Generated by default | The Draft Logic section displays. |  |
| 5 | Add Coding | Choose Draft, implement your logic in Draft Logic section, for example:  if salesdocument-sddocumentcategory = 'B' and salesdocument-sddocumentreason = '005'.  salesdocapprovalreason = 'ZQT1'.  endif.   |  | | --- | | Note It is possible to have sales document approvals also for other categories of sales documents.  The coding mentioned above can be seen as independent coding that can be added to the BAdI implementation without removing possible other coding | |  |  |
| 6 | Save and Publish | Choose Save Draft.  Choose Publish. | Custom logic is published. |  |

#### Manage Teams and Responsibilities

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

This process step shows you how to maintain the teams and responsibilities for quotation workflow.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step | Test Step Name | Instruction | Expected Result | Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as a Business Process Specialist. | The SAP Fiori launchpad displays. |  |
| 2 | Access the App | Open Manage Teams and Responsibilities (F2412). |  |  |
| 3 | Create A New Team | Choose Create Team. |  |  |
| 4 | Enter General Information | Make the following entries and press Enter:  Name: Quotation Workflow  Description: Quotation Workflow  Status: Ready to Use  Type: SALES |  |  |
| 5 | Add Team Members | On Team Members tab, choose Add.  From the Items section, select a Business Partner checkbox and choose OK  Last Name: SalesManager | The Select: Business Partner screen displays.  Team member sales manager is added. |  |
| 6 | Add Function to Team Members | In the Function field, choose Select. On the Select: Functions screen, select the following functions, and choose OK.   * CMR1LVLA: Sales Document Approver -Level 1 * CMR2LVLA: Sales Document Approver -Level 2 |  |  |
| 7 | Save | Choose Save. | User created a new team and appropriate function(s) have been assigned to the business user(s) to be configured as approver(s). |  |

Configure Users

The user for Business Partner must be an employee user.

For the steps of user configuration, please refer to the sections in the Administration Guide for the Implementation of SAP Best Practices for SAP S/4HANA (1709 FPS0) Admin Guide: [Creating approvers](https://help.sap.com/viewer/S4HANA_1809_AdminGuide/017b7d3ea4c04710ba802b6bf454c230.html).

#### Set up Workflow

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

This process step shows you how to set up workflow.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step | Test Step Name | Instruction | Expected Result | Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as a Configuration Expert - Business Process Configuration. | The SAP Fiori launchpad displays. |  |
| 2 | Access the App | Open Manage Sales Document Workflows (F3014). | The Manage Workflows screen displays. |  |
| 3 | Create the First Workflow | Choose Workflow for Sales Quotations next to Workflow.  Choose Add.   |  | | --- | | Note If the workflow has already been defined, please skip below steps. | | The New Workflow screen displays. |  |
| 4 | Maintain General Data | Make the following entries.  In the Header tab:  Name: <Second Approver- Net Value over 1000 EUR> |  |  |
| 5 | Set Preconditions | Under Preconditions tab, choose  Net Amount is greater than, then enter below data:  Currency: EUR  Amount: 1000  Choose Save. | Preconditions are set. |  |
| 6 | Create First Workflow | From the Steps section, choose Add.  Select the following entries from dropdown lists:  Under the Header tab:  Type: Release of Sales Quotation  Under the Recipients tab:  Assignment By: Role  Role: Sales Document Approver - Level 2  Under the Exception Handling tab:  Name: Rework Sales Quotation  Required Action: Rework of Sales Quotation  Action Result: Restart Workflow  Choose Add to append this step to the workflow and choose Save. | The New Step screen displays.  The first workflow is created. |  |
| 7 | Create the Second Workflow | Choose Back to the Manage Workflows screen.  Choose Add. | The New Workflow screen displays. |  |
| 8 | Maintain General Data | Make the following entries.  Under the Header tab:  Name: <First Approval- No Conditions> |  |  |
| 9 | Create Second Workflow | From the Steps section, choose Add.  Select the following entries from dropdown lists:  Under the Header tab:  Type: Release of Sales Quotation  Under the Recipients tab:  Assignment By: Role  Role: Sales Document Approver - Level 1  Under the Exception Handling tab:  Name: Rework Sales Quotation  Required Action: Rework of Sales Quotation  Action Result: Restart Workflow  Choose Add to append this step to the workflow and choose Save. | The New Step screen displays.  The second workflow is created. |  |
| 10 | Activate Workflows | Choose Back to the Manage Workflow screen.  Choose Define Order. Adjust the order as below:  Second Approver- Net Value over 1000 EUR: Order 1  First Approver-No Conditions: Order 2  Choose Activate to active the workflows. | Workflows are activated. |  |

### Create Condition Records (Optional)

Purpose

In case you have finetuned the access sequence of SAP pre-shipped condition types, the relative condition records should be created accordingly.

You can find general information on how to create master data objects in the following [Master Data Scripts (MDS)](https://help.sap.com/docs/s4hana-best-practices/s4hana2023-master-data) :

Table 2: Master Data Script Reference

|  |  |
| --- | --- |
| Master Data ID | Description |
| BET | Create Sales Pricing Condition |

### Manage Situation Types (Optional)

Purpose

In this procedure, you configure the situation type by using template.

Procedure

|  |
| --- |
| Note Please make sure scope item 31N - Situation Handling is activated if you want to execute this step. |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log on | Log on on to the SAP Fiori launchpad as a Configuration Expert - Business Process Configuration | The SAP Fiori Launch Pad displays. |  |
| 2 | Access the App | Open Manage Situation Types (F2947). | The Manage Situation Types screen displays. |  |
| 3 | Select the template to copy | Search for SD\_EXPIRING\_QUOTATION and Choose Go.  Select the the latest version SD\_EXPIRING\_QUOTATION, then choose Copy. | The Situation Type screen displays. |  |
| 4 | Maintain the situation | Make the following entries and choose Save:  ID: Z\_EXP\_Quotation  Name: Quotation Situation  In the Conditions tab, make the attribute value to configure the conditions to use this function  In the Batch Job Scheduling tab:  Time Zone: CET  Start Batch Job At: 14:00  In the Situation Display tab:  Resend Notification: Check  In the Recipients tab:  Choose Add Team Category, and in the pop up window, choose SALES and choose Select  Maintain Member Function from drop-down window if necessary;  Choose Create. | Then situation type is maintained. |  |
| 5 | Enable this situation type | In the pop up window, Choose Yes to enable the situation type. | The situation type is enabled. |  |

# Overview Table

The test script Sales Quotation consists of several process steps provided in the table below.

|  |
| --- |
| Note If your system administrator has enabled spaces and pages on the SAP Fiori launchpad, the homepage will only contain the essential apps for performing the typical tasks of a business role.  You can find all other apps not included on the homepage using the search bar.  If you want to personalize the homepage and include the hidden apps, navigate to your user profile and choose App Finder. |

|  |  |  |  |
| --- | --- | --- | --- |
| Process Step | Business Role | APP/Transaction | Expected Results |
| [Create Sales Quotation](#unique_13) [page ] 16 | Internal Sales Representative |  |  |
| [Process Sales Quotation Approval (Optional)](#unique_14) [page ] 18 |  |  |  |
| [Withdraw from Approval](#unique_15) [page ] 18 | Internal Sales Representative |  |  |
| [Approve/Reject/Rework Quotation](#unique_16) [page ] 20 | Sales Manager | My Inbox - All Items (F0862) |  |
| [Rework Sales Quotation](#unique_17) [page ] 21 |  |  |  |
| [Change Quotation (Optional)](#unique_18) [page ] 21 | Internal Sales Representative |  |  |
| [Set Quotation as Rework not Required](#unique_19) [page ] 22 | Internal Sales Representative | My Inbox - All Items (F0862) |  |
| [Release the Reworked Quotation](#unique_20) [page ] 23 | Sales Manager | My Inbox - All Items (F0862) |  |
| [Change Quotation](#unique_21) [page ] 24 | Internal Sales Representative |  |  |
| [Reject Sales Quotation](#unique_22) [page ] 25 | Internal Sales Representative |  |  |

# Test Procedures

The following sections describe test procedures for each process step that belongs to this scope item.

## Create Sales Quotation

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

This process step shows you how to create a sales quotation.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log On | Log on to the SAP Fiori launchpad as an Internal Sales Representative. | The SAP Fiori launchpad displays. |  |
| 2 | Access the App | Open Manage Sales Quotations (F1852). | The Manage Sales Quotations (F1852) screen displays. |  |
| 3 | Navigate to Create Sales Quotation Screen | On the Manage Sales Quotations (F1852) screen, choose Create Quotation. |  |  |
| 4 | Enter Sales Document Type | Make the following entries and choose Enter:  Quotation Type <Quotation Type> For example, QT (Quotation)   |  | | --- | | Note If desired, you can enter the organizational data. | |  |  |
| 5 | Enter Quotation Details | Make the following entries, and choose Enter.   * Sold-to Party: <Sold-to Party> For example, 10100001 * Ship-to Party: <Ship-to Party> For example, 10100001 * Valid to: <Enter a Date> For example, one year after today * Material : <Material Number, or, Substituted Material> For example, TG11 * Order Quantity: <Quantity, for example, 5>   If you would like to use Sales order approval workflow, please maintain the following:  Order Reason: newspaper advertisement   |  | | --- | | Note If you would like to offer free-of-charge material to customer, maintain the item category as below:  • Item category: CBQX (for material TG11)  • Item category: CBQ3 (for material TG10)  • Item category: CBQ4 (for material TG13) | |  |  |
| 6 | Save | Choose Save . | The quotation is created. |  |
| 7 | Check Quotation Status | Choose Display.  At the menu bar on the top of the screen, choose More > Goto > Header > Status .  In the Processing Status section, check if the Approval Status field exists. If yes, it means quotation workflow is triggered. Then go to [Process Sales Quotation Approval (Optional)](#unique_14) [page ] 18 chapter. If the Approval Status field doesn't exist, then go to [Change Quotation](#unique_21) [page ] 24 chapter. | The Display Quotation XXXXX: Header Data screen displays. You can check quotation status. |  |

Printing form

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log On | Log on to the SAP Fiori launchpad as an Internal Sales Representative. | The SAP Fiori launchpad displays. |  |
| 2 | Access the App | Open Manage Sales Quotations (F1852). | The Manage Sales Quotations (F1852) screen displays. |  |
| 3 | Search For Sales Quotation | Enter search term(s) in filter bar and choose Go.  For example: enter sales quotation number in field Sales Quotation. | Sales quotation is displayed in result list. |  |
| 4 | Navigate to Sales Quotation Screen | Click sales quotation number and choose Display quotation. | The Display Quotation xxx: Overview screen displays. |  |
| 5 | Display Print Preview | On the Display Quotation xxx: Overview Screen, choose from menu More > Extra > Output > Print Preview .  Choose the existing item with output type Sales Quotation and choose Display Document. | Preview for PDF document displays. |  |

## Process Sales Quotation Approval (Optional)

|  |
| --- |
| Note Only relevant if below conditions are fulfilled:   1. Approval reason(s) is defined and assigned, details refer to the Define and Assign Approval Reasons chapter. 2. The Cloud BAdI that returns an approval reasons is implemented, details refer to the Implement Cloud BADI chapter. 3. Total amount of the quotation is not less than 100 EUR. 4. Order reason is 005. |

### Withdraw from Approval

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

This process step shows you how to withdraw quotation approval.

Prerequisites

Sales manager doesn’t make approval decision yet.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log On | Log on to the SAP Fiori launchpad as an Internal Sales Representative. | The SAP Fiori launchpad displays. |  |
| 2 | Access the App | Open Manage Sales Quotations (F1852). | The Manage Sales Quotations (F1852) screen displays. |  |
| 3 | Search for Sales Quotation | Enter search terms in filter bar, and choose Go.  For example: enter sales quotation number in the Sales Quotation field. | Sales quotation displays in result list. |  |
| 4 | Navigate to Sales Quotation Screen | Choose the arrow at the end of quotation row. | The Display Quotation xxx: Overviewscreen displays. |  |
| 5 | Withdraw Approval Request | In the menu bar at the top, choose More > Edit > Additional Functions > Withdraw Approval Request.  Choose Continue to confirm the information shown as The approval request for sales document XXXXXXX was withdrawn. | The approval request is withdrawn. |  |
| 6 | Change Quotation | On the Change Quotation: Overview screen, make some changes, for example:  Valid to: <Enter a Date> | Approval status is changed to In Approval. |  |

### Approve/Reject/Rework Quotation

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

This process step shows you how to release, reject, or request rework.

Prerequisites

Approval status of the quotation is In Approval.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log On | Log on to the SAP Fiori launchpad as a Sales Manager. | The SAP Fiori launchpad displays. |  |
| 2 | Receive Notification | Open My Inbox - All Items (F0862).   |  | | --- | | Note You can also choose Notifications icon on the top-right corner to navigate to My Inbox screen. | | The Inbox screen displays. |  |
| 3 | Refresh | Choose Refresh if necessary. | Inbox is refreshed. |  |
| 4 | Approve/Reject/Rework Quotation | You receive the notification of the quotation. Choose one from the options on the bottom bar.  Option 1: Release  Option 2: Reject  Option 3: Request Rework | The Submit Decision dialog box displays. |  |
| 5 | Submit | Enter some comments and choose Submit. | Based on above decisions, choose next steps accordingly:  • Release: the whole process ends, no subsequent step is needed.  • Reject: the whole process ends, no subsequent step is needed.  • Request Rework: go to Rework Quotation chapter. |  |

### Rework Sales Quotation

|  |
| --- |
| Note Only relevant if the workflow is set as Request Rework by sales manager previously. After sales manager requests rework, sales representative either changes quotation or directly sets "rework not required" without any quotation change. Choose one from the following activities Change Quotation and Set Quotation as Rework not Required alternatively. |

#### Change Quotation (Optional)

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

In this activity, you change the quotation.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log On | Log on to the SAP Fiori launchpad as an Internal Sales Representative. | The SAP Fiori launchpad displays. |  |
| 2 | Access the App | Open Manage Sales Quotations (F1852). | The Manage Sales Quotations (F1852) screen displays. |  |
| 3 | Search for Sales Quotation | Enter search terms in filter bar, and choose Go.  For example: enter sales quotation number in Sales Quotation field. | Sales quotation is displayed in result list. |  |
| 4 | Navigate to Sales Quotation Screen | Choose sales quotation number and choose Change quotation. | The Change Quotation xxx: Overview screen displays. |  |
| 5 | Change Quotation | Make the following entries and choose Enter:  Order Quantity <Quantity>, for example, 10 |  |  |
| 6 | Save | Save your entries. | The quantity is changed in the quotation document. |  |

#### Set Quotation as Rework not Required

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

Sales representative can set rework not required if no change for quotation is needed.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log On | Log on to the SAP Fiori launchpad as an Internal Sales Representative. | The SAP Fiori launchpad displays. |  |
| 2 | Receive Notification | You receive a notification in the notification section.  Open  My Inbox - All Items (F0862) app to proceed to the notification or choose the notification in the notification section. | The Inbox screen displays. |  |
| 3 | Refresh | Choose Refresh if necessary. | Inbox is refreshed. |  |
| 4 | Done | Check the inbox items, and choose Rework not Required. | Set item to rework not required. |  |

#### Release the Reworked Quotation

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

In this activity, you release the reworked quotation.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log On | Log on to the SAP Fiori launchpad as a Sales Manager. | The SAP Fiori launchpad displays. |  |
| 2 | Receive Notification | You receive a notification in the notification section  Open My Inbox - All Items (F0862) app to proceed to the notification or choose the notification in the notification section. | The Inbox screen displays. |  |
| 3 | Refresh | Choose Refresh if necessary. | Inbox is refreshed. |  |
| 4 | Approve Quotation | You receive the notification of the reworked quotation. Choose Release and input the comment if necessary. Choose Submit. | The reworked quotation is released. |  |

## Change Quotation

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

This process step shows you how to change sales quotation to meet customer's requirements, such as changing quotation quantity.

|  |
| --- |
| Note After you have completed this activity:  Option A: If the customer rejects the sales quotation, go to [Reject Sales Quotation](#unique_22) [page ] 25 step.  Option B: If the customer accepts the sales quotation, go to Appendix step. |

Prerequisites

Only relevant when quotations do not need to be approved.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log On | Log on to the SAP Fiori launchpad as an Internal Sales Representative. | The SAP Fiori launchpad displays. |  |
| 2 | Access the App | Open Manage Sales Quotations (F1852). | The Manage Sales Quotations (F1852) screen displays. |  |
| 3 | Search for Sales Quotation | Enter search terms in filter bar, and choose Go.  For example: enter sales quotation number in Sales Quotation field. | Sales quotation is displayed in result list. |  |
| 4 | Navigate to Sales Quotation Screen | Choose sales quotation number and choose Change quotation. | The Change Quotation xxx: Overview screen displays. |  |
| 5 | Change Quotation | Make the following entries and choose Enter:  Order Quantity <Quantity>, for example, <10> |  |  |
| 6 | Save | Save your entries. | The quantity is changed in the quotation document. |  |

## Reject Sales Quotation

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |
| --- | --- | --- | --- |
| Test Case ID | <X.XX> | Testing Date: |  |
| Tester Name: |  | Duration: |  |
| Business Role(s): |  | Responsibility: | <State the Service Provider, Customer or Joint Service Provider and Customer> |

Purpose

This process step shows you how to enter reasons for customer rejections of a sales quotation.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log On | Log on to the SAP Fiori launchpad as an Internal Sales Representative. | The SAP Fiori launchpad displays. |  |
| 2 | Access the App | Open Manage Sales Quotations (F1852). | The Manage Sales Quotations (F1852) screen displays. |  |
| 3 | Search for Sales Quotation | Enter search term(s) in filter bar and choose Go.  For example: enter sales quotation number in Sales Quotation field. | Sales quotation is displayed in result list. |  |
| 4 | Reject All Items | Select your quotation entry and choose Reject All Items. | The Reject All Items dialog box displays. |  |
| 5 | Choose Rejection Reason | Choose an appropriate reason in the dropdown menu and choose OK. | Quotation is rejected. |  |

|  |
| --- |
| Note In the Quotation Conversion Rates app, you may monitor the proportion of quotations, which have been converted into sales orders.  You may select from dropdown list in the top-left corner, such as, customer or sales organization, to display a percentage graph, that which shows you how many quotations have been converted into sales orders. |

# Appendix

## Process Integration

The process to be tested in this test script is part of a chain of integrated processes.

### Succeeding Processes

After completing the activities in this test script, you can continue testing the following business processes:

|  |  |
| --- | --- |
| Process | Business Condition |
| Sell from Stock (BD9) (optional) | Process sequence for a standard sales process (sell from stock) with a customer.  Using the master data from this document, complete relevant activities described in the test script Sell from Stock (BD9).   * When creating the Sales Order, create it with reference using the sales quotation number. |
| Situation Handling (31N) (optional) | Complete the activities described in test script Situation Handling (31N) to trigger a situation when an open quotation will expire. The situation shall be notified to the responsible employee (defined within responsibility management).  Possible dimension for Situation Handling:   * Order Net Value * Sales Organization * Sold-to Party * Overall Status * Quotation valid date * Conversion Rate * Days Before Expiry |

Typographic Conventions

|  |  |
| --- | --- |
| Type Style | Description |
| Example | Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options.  Textual cross-references to other documents. |
| Example | Emphasized words or expressions. |
| EXAMPLE | Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE. |
| Example | Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools. |
| Example | Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation. |
| <Example> | Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system. |
| EXAMPLE | Keys on the keyboard, for example, F2 or ENTER. |

|  |
| --- |
|  |
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