Materials Management (MM) Case Study

This case study explains an integrated materials management process in detail and thus fosters a thorough understanding of each process step and underlying SAP functionality.

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| Product  S/4HANA 1709  Global Bike  Fiori 2.0  Level  Undergraduate  Graduate  Beginner  Focus  Materials Management  Authors  Bret Wagner  Stefan Weidner  Version  3.2  Last Change  June 2018 | MOTIVATION  The data entry requirements in the materials management exercises (MM 1 through MM 5) were minimized because much of the data was stored in the SAP system. This stored data, known as master data, simplifies the processing of business transactions.  In the procurement process, we used master data for vendors, materials (products we purchased) to simplify the procurement process.  In this case study, we will create the master data for a new vendor and a new trading good. |  | PREREQUISITES  Before you use this case study, you should be familiar with navigation in the SAP system.  In order to successfully work through this case study, it is not necessary to have finished the MM exercises (MM 1 through MM 5). However, it is recommended.  NOTES  This case study uses the Global Bike (GBI) data set, which has exclusively been created for SAP UA global curricula. |



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|  | Process Overview | | |
| **Learning Objective** Understand and perform a purchasing process cycle  **Scenario** In order to process a complete purchasing process you will take on different roles within the GBI company, e.g. purchasing agent, warehouse worker, accounting clerk. Overall, you will be working in the Materials Management (MM) and the Financial Accounting (FI) departments.  **Employees involved** Joyce Hausman (Contract Administrator)  Sandeep Das (Warehouse Supervisor) Sergey Petrov (Warehouse Employee) Wilton Saban (Inventory Supervisor) Alberto Conti (Technical Office Assistant) Aura Maxwell (Buyer)  Tatjana Karsova (Receiving Clerk)  Silvia Cassano (Accounts Payable Specialist)  Shuyuan Chen (Chief Accountant) | | **Time** 140 min |
|  | |  |
| Before you start the purchasing process you will create a new vendor (Mid-West Supply) in Lincoln. Then you create a new master record for a trading good (Chain Lock) in the system. After checking the stock (that will be zero) you start the procurement process by creating a purchase requisition. As the buyer, you will create a request for quotation and enter the submitted bids from various vendors – including your new vendor. After evaluating and accepting the quotation of Mid-West Supply you will create a purchase order referencing the RFQ. You will then post the goods receipt and verify the physical receipt into stock. After creating two partial invoices you will post the payments to the vendor and review the G/L accounts.  The graphic below displays the complete process.  Bild4 | | |
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|  | Step 1: Create New Supplier | |
| **Task** Create a new supplier.  **Short Description** Use the SAP Fiori Launchpad to create a new supplier (Mid-West Supply).  **Name (Position)** Joyce Hausman (Contract Administrator) | | **Time** 10 min |
|  | |  |
| Suppliers are established in both accounting and purchasing. The vendor master record requires three views – general, accounting, and purchasing in order to be active. Vendors can be created centrally meaning that all views are generated concurrently, or responsibility can be distributed to accounting and purchasing for creating and maintaining their respective views. In this case study, central creation will be used to enter all of the needed data. In this way, this vendor record will contain all of the information necessary to conduct business transactions. | | Vendor master |
|  | |  |
| To create a new vendor, use the app *Maintain Business Partner*. | | Fiori App |
|  | |  |
| This will produce the following screen. | |  |
|  | |  |
| In the *Maintain Business Partner* screen choose . | |  |
| In the *Create Organization* choose in the pull-down menu Create in BP role  **FI Vendor**.  In the pop-up *Change to another BP role in create mode* click on . | |  |
| Select **Company** as Title, enter **Mid-West Supply** as Name, and your number (**###)** for Search term. As Street enter **335 W Industrial Lake Dr**, as Postal code enter **68528**, and **Lincoln** for City. Further specify **US** (Country) and **NE** (Region). As communication language choose **English**. Compare your entries with the screen shown below. | | Company  Mid-West Supply  ###  335 W Industrial Lake Dr  68528 Lincoln  US NE  English |
|  | |  |
| Navigate to the tab *Vendor: Tax Data*.  In the Additional Tax Data field group enter **12-3456###** as Tax Number (remember to replace ### with your number). Confirm your entry and click on the button  in the menu bar.  Enter **US00** for company code. Confirm with Enter. | | 12-3456###  US00 |
| In the tab *Vendor: Account Management* enter **300000** as Reconciliation acct. Then confirm with Enter. | | 300000 |
| In the tab *Vendor: Payment Transactions* enter **0001** as Terms of Payment and select the checkbox for **Check Double Invoice**. | | 0001  Check Double Invoice |
| In the tab *Vendor: Correspondence* enter **your name** as Clerk at vendor. | | Your name |
| In the dropdown menu *Create in BP role* choose the second **Vendor** of the listed Vendor-options. In the Screen *Change to another BP role in create mode* click on .  To expand your purchase data information of your newly created partner Mid-West Supply click on  .  Enter **US00** as Purchasing Organization. Then click on Enter. | | US00 |
| Enter **USD** as Order currency and choose with the F4-help **Payable immediately Due net** in Terms of Payment. | | USD  Payable immediately Due net |
| Navigate to the tab *Partner Functions* and enter **VN** for the column PF. Press enter. | | VN |
|  | |  |
| Click on  to save your vendor master record. The system will automatically assign a unique number for your vendor. | |  |
| Click on the home icon  to return to the Fiori Launchpad overview. | |  |
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|  | Step 2: Create Material Master for Trading Goods | |
| **Task** Create material masters for trading goods.  **Short Description** Use the SAP Fiori Launchpad to create a trading good master record for a Chain Lock in the Wholesale distribution channel.  **Name (Position)** Sandeep Das (Warehouse Supervisor) | | **Time** 15 min |
|  | |  |
| To create a trading good material master record, use the app *Create Material*. | | Fiori App |
|  | |  |
| In the Material field, type in **CHLK1###** (replace ### with your number), select **Retail** as an Industry sector and **Trading Goods** as Material type. Then, click on  or press Enter. | | CHLK1###  Retail  Trading Goods |
|  | |  |
| On the next screen, select the following views by clicking on the square in front of the respective rows:  - **Basic Data 1** - **MRP 1**  - **Sales: Sales Org. Data 1** - **MRP 2**  - **Sales: Sales Org. Data 2** - **MRP 3**  - **Sales: General/Plant Data** - **General Plant Data/Storage 1**  - **Purchasing** - **Accounting 1**  Also, select **Create views selected**. | | Basic Data 1  Sales: Sales Org. Data 1  Sales: Sales Org. Data 2  Sales: General/Plant Data  Purchasing  MRP 1  MRP 2  MRP 3  General Plant Data /St.1  Accounting 1  Create views selected |
| Then, click on  . | |  |
|  | |  |
| On the Organizational Levels pop up, enter plant **MI00** (Miami), Stor. Location **TG00** (Trading Goods), Sales Org. **UE00** (US East), and Distr. Channel **WH** (Wholesale). Compare with the screen shown below. Then, click on . | | MI00  TG00  UE00  WH |
|  | |  |
| On the *Basic Data 1* tab, enter **Chain Lock** as a description (text field next to the material number). As Base Unit of Measure, use the F4 help to find and select **each** (**EA**). In the Material Group field, select **UTIL** (Utilities). As division, choose **AS** (Accessories). | | Chain Lock  EA  UTIL  AS |
| In the Gross Weight field and in the Net Weight field, enter **65** and select **Ounce** (**OZ**) as Weight unit. Then press Enter. | | 65  65  OZ |
| On the *Sales: sales org. 1 tab*, in the Delivering Plant field use the F4 help to find and select the Miami plant (**MI00**). In the Tax data field group, in the left Tax classification column (the one that is editable = white background color) select Exempt (**0**) for all three tax categories.  Click on . On the following screen, enter Scale quantity **1** and Amount **69.00**. Compare your entries with the screen below, then click on  to return to the *Sales: sales org. 1* tab. Then place the cursor in the field Delivering Plant and press Enter. | | MI00  0  0  0  1  69.00 |
|  | |  |
| On the *Sales: sales org. 2* tab, select Matl statistics grp **1**. Then press Enter. | | 1 |
| On the *Sales: General/Plant* tab, select Availability check **02** (Individual requirements) and use the F4 help to choose Trans. Grp **0001** (On pallets) and LoadingGrp **0002** (Hand lift). Click Enter. | | 02  0001  0002 |
| On the *Purchasing* tab, enter Purchasing Group **N00** (North America) and confirm with Enter. | | N00 |
| On the *MRP 1* tab, select MRP type **PD** (MRP), MRP Controller **000**, use the F4 help to select **Lot-for-lot order quantity (EX)** for Lot size procedure and Minimum Lot Size **10**. Click Enter | | PD  000  EX  10 |
| On the *MRP 2* tab, enter Planned Deliv. Time **6** (days) and select SchedMargin key **001**. | | 6  001 |
| Under *Net requirements calculation* you can enter a Safety stock. What does that mean?  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |  |
| Confirm with Enter. | |  |
| On the *MRP 3* tab, check if the Availability check is set correctly to **02**. Then, press Enter. Skip the *Plant data / stor. 1* view by choosing Enter. | | 02 |
| On the *Accounting 1* tab, select Valuation Class **3100** (Trading Goods), enter Moving price (Per. Unit price) **33.50**. | | 3100  33.50 |
| What is the difference between a moving and a standard price?  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |  |
| Then, click on  to save your material. | |  |
|  | |  |
| Click on the home icon  to return to the Fiori Launchpad overview. | |  |
|  | |  |

|  |  |  |
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|  | Step 3: Extend Material Master for Trading Goods | |
| **Task** Extend a material master.  **Short Description** Copy the sales views of the new trading good (Chain Lock) from the Miami plant to the San Diego plant to maintain a different condition.  **Name (Position)** Sergey Petrov (Warehouse Employee) | | **Time** 10 min |
|  | |  |
| To create new views for an existing trading good, use the Fiori app *Create Material*. | | Fiori App |
|  | |  |
| Enter your material number **CHLK1###** (again, replace ### with your three-digit number) in the Material field. In the Copy from… field group, enter **CHLK1###** in the Material field again. Then, press Enter or . | | CHLK1###  CHLK1### |
| The system automatically copies the Industry sector and material type. Press again  to confirm the message. | |  |
|  | |  |
| In the Select View(s) window, highlight all **three Sales views**, make sure the indicator **Create views selected** is checked, and click on . | | 3 Sales views  Create views selected |
| In the *Organizational Levels* window, on the left side (Organizational levels) enter Plant **SD00**, Sales Org. **UW00** and Distr. Channel **WH**. On the right side (Copy from), enter Plant **MI00**, Sales Org. **UE00** and Distr. Channel **WH**. Before pressing Enter, compare your entries with the screen shown below. | | SD00  UW00  WH  MI00  UE00  WH |
|  | |  |
| The system will take you to the *Sales: sales org. 1* view. Note that sales data has been copied from views created for the Wholesale distribution channel. The system displays a message saying that the material already exists and will be extended. | |  |
|  | |  |
| Change Delivering Plant MI00 to **SD00**. Then, click on . Enter Scale quantity **1** and amount **65.00**. Click on  and save with . | | SD00  1  65.00 |
|  | |  |
| Click on the home icon  to return to the Fiori Launchpad overview. | |  |
|  | |  |

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|  | Step 4: Display Stock/Requirements List | |
| **Task** Display the stock/requirements list.  **Short Description** Display and review the stock/requirements list for your Chain Lock on hand balance and the demand that exists against this product. The report should show that there is no stock and therefore nothing is available for use at this time.  **Name (Position)** Wilton Saban (Inventory Supervisor) | | **Time** 10 min |
|  | |  |
| The stock/requirements list is a dynamic list and, therefore, changes whenever a transaction occurs using the given material. | | Stock/requirements list |
|  | |  |
| To display the stock/requirements list, use the app *Display Stock Overview.* | | Fiori App |
|  | |  |
| This will produce the following screen. | |  |
|  | |  |
| To find the material number for your Chain Lock, click on the Material field, then click on the search icon . | |  |
| Enter in the Material field your number **\*###**. | |  |
|  | |  |
| Use the Button  to get the list of materials. Double click on your material to select it. | |  |
| Enter the plant DC Miami (**MI00**). | | MI00 |
|  | |  |
| Choose  to view at the stock level. | |  |
| Your stock/requirements list should look similar to the screen below. | |  |
|  | |  |
| Click on the home icon  to return to the Fiori Launchpad overview. | |  |
|  | |  |

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|  | Step 5: Create Purchase Requisition | |
| **Task** Create a purchase requisition.  **Short Description** Sales management has informed the purchasing department of a promotional campaign that will commence in 3 months to introduce the new Chain Locks. Create a purchase requisition for 200 of your locks to request bids so that a vendor can be chosen to fill the expected needs associated with this sales campaign.  **Name (Position)** Wilton Saban (Inventory Supervisor) | | **Time** 5 min |
|  | |  |
| To create a purchase requisition, use the app *Create Purchase Requisition*. | | Fiori App |
|  | |  |
| This will produce the following screen. | |  |
|  | |  |
| Choose . | |  |
| Enter Material **CHLK1###** (replace ### with your number). For Valuation Price enter **32.00 USD** and Quantity **200**. As Delivery Date select or enter the day **three months from today**. | | CHLK1###  32.00  USD  200  3 months from today |
| In the Item text field, type the Header note: “Global Bike Inc. is formally requesting quotations for the following material. Quotes will be accepted until [1st day of the next month].” | |  |
|  | |  |
| Choose . You will receive . | |  |
| In the right upper corner, the item is shown in the cart. | |  |
|  | |  |
| Then, click on  to view your purchase requisition. | |  |
|  | |  |
| Choose , to add some details. In the view *Item Details* enter **N00** as Purchasing Group, **US00** as Purchasing Organization, **US00** as Company Code and **MI00** as Plant. Enter as Country Key **US**. Click on | | N00  US00 US00  MI00  US |
|  | |  |
|  | |  |
| Click at  and choose , to confirm your request. | |  |
| The system will create a unique document number. | |  |
|  | |  |
| Click on the home icon  to return to the Fiori Launchpad overview. | |  |
|  | |  |

|  |  |  |  |
| --- | --- | --- | --- |
|  | Step 6: Manage Stock | | |
| **Task** Manage the stock.  **Short Description** Display and review the stock/requirements list for your Chain Locks on hand and the demand that exists against this product. Since we just created a purchase requisition for 200 of them, this event should be visible within the stock/requirements list with a date of roughly 3 months from today.  **Name (Position)** Alberto Conti (Technical Office Assistant) | | **Time** 5 min | |
|  | |  | |
| To display the stock/requirements list again, use the app *Manage Stock*. | | Fiori App |
|  | |  |
| If not already defaulted in, choose Plant **MI00** and enter your Material **CHLK1###**. A list shows up under the Material field. Click on your Material **CHLK1###**. Your stock/requirements list should now look similar to the screen below. | | MI00  CHLK1### |
|  | |  |
| Click on . | |  |
| In the new screen click on  in the row of MI00 in the column of stock history | |  |
|  | |  |
| The system will show the history of your material CHLK1### in the plant MI00. | |  |
|  | |  |
| Click on the home icon  to return to the Fiori Launchpad overview. | |  |
|  | |  |

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| --- | --- | --- |
|  | Step 7: Create Request for Quotation | |
| **Task** Create a request for quotation for your requisition.  **Short Description** Create a separate request for quotation (RFQ) for several vendors. This process will be used to collect the necessary pricing and delivery information that is needed to support the selection of a vendor to supply your Chain Locks.  **Name (Position)** Alberto Conti (Technical Office Assistant) | | **Time** 10 min |
|  | |  |
| To create a request for quotation (RFQ), use the Fiori App *Create Request for Quotation*. | | Fiori App |
|  | |  |
| Enter RFQ Type **AN (RFQ)**, **today in one month** as Quotation Deadline, as Purchasing Organization **US00, N00** as Purchasing Group and as Plant **MI00**. Then click on . | | AN  today in one month  US00  N00  MI00 |
|  | |  |
| Enter in the *Create RFQ: Item Overview* screen your material number **CHLK1###** in the *Material*field and confirm with Enter or . Enter as RFQ Quantity **200** and as Deliv. Date **three months from today**. Then press Enter. Then click on . | | CHLK1###  200  Three months from today |
|  | |  |
| In the *Create RFQ: Header Data* screen enter as Coll. No. **RFQ ###**. Then click on . | | RFQ ### |
|  | |  |
| Enter the number for your vendor **Mid-West Supply**, press Enter and then click on  . | | Mid-West Supply |
| If you don’t remember your vendornumber use the **F4** help to find your vendor Mid-West Supply. Open the Tab *Supplier: Purchasing*. Enter **###** as Search Term, **Lincoln** as City and click on . Double-click on the result row to insert the number into the Vendor field. | | ###  Lincoln |
|  | |  |
| You will get the following message in the lower bar: | |  |
|  | |  |
| Repeat these steps with Dallas Bike Basics **103###**. | | 103### |
|  | |  |
| You will get the following message in the lower bar: | |  |
|  | |  |
| Repeat the step also for Spy Gear **107###**. | | 107### |
|  | |  |
| You will get the following message in the lower bar: | |  |
|  | |  |
| Click on the home icon  to return to the Fiori Launchpad overview. | |  |
|  | |  |

|  | Step 8: Maintain Quotations from Vendors | |
| --- | --- | --- |
| **Task** Maintain quotations from vendors.  **Short Description** As we receive responses to our RFQs submitted to vendors, it is necessary to maintain their respective data in our procurement system so that a comparison can be made to support the vendor selection process.  **Name (Position)** Alberto Conti (Technical Office Assistant) | | **Time** 5 min |
|  | |  |
| To maintain quotations from vendors, use the app *Maintain Quotations from Vendors*. | | Fiori App |
|  | |  |
| Use the **F4** help in the RFQ field to find and enter the RFQ number from your Mid-West Supply vendor. On the *Purchasing Documents per Supplier* tab, you need to find and select your vendor **Mid-West Supply** first. Position your cursor in the Vendor field and press **F4** again. Start the search after typing in Country **US** and your three-digit number (**###**) as Search term. | | F4  Mid-West Supply  F4  US  ### |
| Double-click on your new vendor to select it. Now that your vendor number is put in the Vendor field, press Enter or click on  to find the first RFQ number you have created in the last task. | |  |
| Double-click on your RFQ to populate the number into the RFQ field on the *Maintain Quotation: Initial Screen*. Then click on  or press Enter. | |  |
|  | |  |
| In the *Maintain Quotation: Item Overview* screen, enter a net price of **32.00** USD. Click on . Then, click on . | | 32.00 |
|  | |  |
| Here, other discounts and surcharges included in the quotation could be specified. In our case, just set the Valid to data to **three months from today**. | | 3 months from today |
|  | |  |
| Click on  to go back to the line item overview. Then, click on  to save your maintained quotation for your Mid-West Supply vendor. The system acknowledges the changes to your first quotation with a success message. | |  |
|  | |  |
| Repeat this process for the other two RFQs you created. Make sure you use the above-described search criteria to find the vendors for your number (###). Enter the following prices:  Dallas Bike Basics **36.50** USD  Spy Gear **35.00** USD  Make sure you save both RFQs and receive the system success messages. | | Dallas Bike Basics  36.50  Spy Gear  35.00 |
| Click on the home icon  to return to the Fiori Launchpad overview. | |  |
|  | |  |

|  | Step 9: Evaluate quotations on price | |
| --- | --- | --- |
| **Task** Evaluate quotations on price. Reject two of the three quotations.  **Short Description** Generate a comparison list for the prices obtained from each of the vendors. The comparison list ranks the quotations by item from lowest to highest price.  The successful vendor (Mid-West Supply) has been selected using the criteria of lowest bidder. It is now necessary to notify the unsuccessful bidders that their quotation will not be accepted. This is accomplished by flagging those vendors needing to be notified.  **Name (Position)** Wilton Saban (Inventory Supervisor) | | **Time** 5 min |
|  | |  |
| To flag/reject quotations, use the App *Evaluate quotations on price*. | | Fiori App |
|  | |  |
| Enter Purchasing Organization **US00**, and Collective RFQ **RFQ ###**. Select **Mean Value Quotation** and **Determine Effective Price**. Then, select  to execute the price comparison. | | US00  RFQ ###  Mean Value Quotation  Determine Effective Price |
|  | |  |
| This will produce the following screen. | |  |
|  | |  |
| Determine the Vendor that you are going to do business with (the lowest priced quotation) by rejecting the other two. To do so, double-click on 36.50 USD. | | 36,50 |
| In the screen *Maintain Quotation: Item 00010* in the section *Quotation Data* choose the checkbox for **Rej. Ind.** to indicate rejection of this quotation. | | Rej. Ind. |
| Click on . Acknowledge the warning message prompted by the system with **Yes** and save anyway. | | Yes |
|  | |  |
| Repeat the process for the second quotation to be rejected (35.00 USD). | |  |
| Click on the home icon  to return to the Fiori Launchpad overview. | |  |
|  | |  |

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|  | Step 10: Create Purchase Order Referencing an RFQ | |
| **Task** Create a purchase order with reference to an RFQ.  **Short Description** Create a PO by referencing the quotation received from the successful vendor. Reference is made to the successful quotation and the details are imported into a new PO.  **Name (Position)** Aura Maxwell (Buyer) | | **Time** 5 min |
|  | |  |
| To create a purchase order, use the app *Create Purchase Order - Advanced*. | | Fiori App |
|  | |  |
| If there is no navigation screen on the left side, click on . As selection variant choose **Requests for quotations** as shown below. | | Requests for quotations |
|  | |  |
| In the following screen, in the Material Number field use the **F4** help to find your Chain Lock trading good. | |  |
| On the *Material by Material Type* tab, select Material Type Trading Goods (**HAWA**) and enter \*### (e.g. \*012 if your number is 012) in the Material field. Then, press Enter or click on . | | HAWA  \*### |
|  | |  |
| Double-click on your Chain Lock (**CHLK1###**) to select it. When your material number is populated in the Material Number field, make sure that all other search criteria fields are blank and click on . This will produce a screen with your three RFQs. Click on  (Change Breakdown). If you don’t see this Button expand your Document Overview screen. | | CHLK1### |
|  | |  |
| In the following screen, select **Vendor** in the right table (Column Set) and click on  to add it to the Sort criteria. Then, select vendor name in the left table (Sort criteria) and click on  to display the vendor name first, then the document number. | | Vendor |
| After you have confirmed your changes by clicking on , you will see the names of your vendors in alphabetic order. | |  |
| Click on the right part of the Select Layout icon  and choose *Change layout…*. Select **Material** in the right table (Column Set) and click on  to add it to the displayed columns. | | Material |
| After you have confirmed your changes by clicking on  and expanding all three folders, you will see the following screen. | |  |
|  | |  |
| Single-click on the requisition/quotation that you want to reference (**Mid-West Supply**) and select  to adopt the information. | | Mid-West Supply |
| Note: If you try and adopt one of the other quotations you will get a message that the quotation item is already rejected. | |  |
| Verify that the system copied the Material number **CHLK1###**, Quantity **200**, **three months from today** as Deliv. Date, and the Net Price of **32.00 USD**. | | CHLK1###  200  3 months from today  32.00 USD |
|  | |  |
| If the header data is not yet displayed, open the section by clicking on . On the *Conditions* tab, record the total value of the purchase order (6,400 USD). | |  |
| If the line item data is not yet displayed, open the section by clicking on .  Select the *first line*. Then, click on  below the table to perform a schedule line split. | | First line |
|  | |  |
| Change the PO Quantity of both items from 200 to **100**. Then change the Delivery Date of the *second line* to **one week after the first delivery**.  If an error message occur, acknowledge it.  Then, press Enter. Verify your item details with the screenshot below. | | 200 🡪 100  Second line  1 week after 1st delivery |
|  | |  |
| If the line item data is not yet displayed, open the section by clicking on  .  Check for both positions on the *Material Data* tab, that **InfoUpdate** is selected. | | InfoUpdate |
| Then, find the following menu item in the menu bar:  **More ► Purchase Order ► Save** | | Menu bar |
| The system will assign a unique purchase order document number. | |  |
|  | | Purchase order document number |
| Click on the home icon  to return to the Fiori Launchpad overview. | |  |
|  | |  |

|  |  |  |
| --- | --- | --- |
|  | Step 11: Display Purchase Order | |
| **Task** Review your purchase order.  **Short Description** Now you want to display electronically what you have sent to your vendor.  **Name (Position)** Aura Maxwell (Buyer) | | **Time** 5 min |
|  | |  |
| To display a purchase order, use the Fiori app *My Purchasing Document Items*. | | Fiori App |
|  | |  |
| The app provides an overview of all purchase requisitions, orders, goods receipts and supplier invoices.  You can find your purchase order by using your assigned number. Therefore, enter **\*###** in the field Search. Choose . | | \*### |
|  | |  |
| Choose . | |  |
| Maybe you need to scroll down to find your supplier and your purchase order. | |  |
|  | |  |
| Click on the home icon  to return to the Fiori Launchpad overview. | |  |
|  | |  |

|  |  |  |
| --- | --- | --- |
|  | Step 12: Create Goods Receipt for Purchase Order | |
| **Task** Create Goods Receipt for Purchase Order  **Short Description** You will receive into inventory the stock items ordered from Mid-West Supply in the previous task. A goods receipt document will be created referencing our purchase order thereby ensuring that we receive the products ordered within the timeframes requested and in a quality condition. Goods on hand will be increased and an accounting document will be generated recognizing the value associated with these goods.  **Name (Position)** Tatjana Karsova (Receiving Clerk) | | **Time** 5 min |
|  | |  |
| To create a goods receipt for a purchase order, use the app *Post Goods Receipt for Purchase Order*. | | Fiori App |
|  | |  |
| Enter **your PO number** in the field Purchase Order. You might want to search for your PO number by using the **F4**-Help. In that case click on . Enter **\*###** in the Search field and choose .. Select the **first one of your Purchase Order** by performing a double click on it. | | your PO number  F4  \*###  First one of your PO |
|  | |  |
| Click in the field of Storage Location of your first line. | |  |
|  | |  |
| Select the available Storage Location **TG00 (Trading Goods)**. | | TG00 |
|  | |  |
| Your order is already split. Select the first item and click on . | |  |
| Make sure that **Trading Goods** as Storage Location and **Unrestricted Use** as stock Type is selected. | | Trading Goods  Unrestricted Use |
| Select **Delivery Completed** and click on . | | Delivery Completed |
|  | |  |
| Finally, leave your first item marked and click on  to post your goods receipt. The system will create a unique goods receipt document. | | Goods receipt document number |
|  | |  |
| Click on the home icon  to return to the Fiori Launchpad overview. | |  |
|  | |  |

|  |  |  |
| --- | --- | --- |
|  | Step 13: Verify Physical Receipt of Goods | |
| **Task** Verify the physical receipt of goods.  **Short Description** Review the current inventory information about your Chain Locks. The stock overview provides inventory information relative to this material for all organizational levels.  **Name (Position)** Tatjana Karsova (Receiving Clerk) | | **Time** 5 min |
|  | |  |
| To verify the receipt of goods, use the Fiori app *Manage Stock*. | | Fiori App |
|  | |  |
| This will produce the following screen. | |  |
|  | |  |
| In the pull-down menu select the plant DC Miami (**MI00**). | | MI00 |
| To find the material number for your Chain Lock, click on the Material field, then click on the search icon . | |  |
| Use the Button  to select the material by the following description. Enter in the search field your number **\*###**. | | \*### |
|  | |  |
| Then click the  icon to find the list of materials. | |  |
|  | |  |
| You can extend the Material Short Text. Then, scroll down until you find the Chain Lock **CHLK1###**. Select it by double clicking on it. | | CHLK1### |
|  | |  |
| This report gives stock levels for the DC in Miami. | |  |
|  | |  |
| You can get an overview about the material by choosing the button  in the right corner. This will give you very specific information about the inventory of the Chain Lock. | |  |
| Click on  in the *Stock History* column in the line of DC Miami (MI00). | |  |
|  | |  |
| In the following screen you get a graphical overview. | |  |
|  | |  |
| Click on the home icon  to return to the Fiori Launchpad overview. | |  |
|  | |  |

|  | Step 14: Create Invoice Receipt from Vendor | |
| --- | --- | --- |
| **Task** Create an invoice receipt from your vendor.  **Short Description** Enter an invoice received from Mid-West Supply for 3,200.00 USD associated with the recent PO and goods receipts. This invoice will be posted to an existing G/L account in your Chart of Accounts and saved as an Accounts Payable to Mid-West Supply. The invoice is presented below in order to support you making the necessary journal entry.  lieferantenrechnung mm en-page-002  **Name (Position)** Silvia Cassano (Accounts Payable Specialist) | | **Time** 5 min |
|  | |  |
| To create an invoice receipt, use the app *Create Supplier Invoice – Advanced*. | | Fiori App |
|  | |  |
| Enter **US00** in the Pop up *Enter Company Code* and click at . | | US00 |
|  | |  |
| Enter **today’s date** as Invoice date using F4 and Enter. Check your Company Code **US00**. Enter the amount from the invoice above (**3,200.00**) in the Amount field and select **XI** as Tax Code (field next to Tax Amount). Then, type in **INVOICE 00504-###** as Text and press Enter. | | today’s date  US00  3,200.00  XI  INVOICE 00504-### |
|  | |  |
| Choose in the lower section the tab *PO Reference*. | |  |
| Enter (or find with F4 help and your supplier as Invoicing Party) **your PO number** in the middle of the screen (next to the drop-down field with Purchase Order/Scheduling Agreement) and press Enter.  Enter **TX0000000** in the Jurisd. Code field and mark the checkbox for **Booking OK** only for the first line. | | your PO number  TX0000000  Booking OK |
|  | |  |
| Use the  button to see if the postings are correct. | |  |
|  | |  |
| Finally, click on  or on  and then on  to post your invoice receipt. The system will generate a unique number for this document. | | Invoice document number |
|  | |  |
| Click on the home icon  to return to the Fiori Launchpad overview. | |  |
|  | |  |

|  |  |  |
| --- | --- | --- |
|  | Step 15: Display Purchase Order History | |
| **Task** Display the purchase order history.  **Short Description** Review the status for the PO for Chain Locks. A PO history tab is created within the PO once a transaction has taken place against the order number to support this functionality.  **Name (Position)** Wilton Saban (Inventory Supervisor) | | **Time** 5 min |
|  | |  |
| To display the purchase order history, use the app *My Purchasing Document Items*. | | Fiori App |
|  | |  |
| The app provides an overview of all purchase requisitions, orders, goods receipts and supplier invoices. | |  |
|  | |  |
| You can find your purchase order by using your assigned number. Therefore, use enter **\*###** in the field Search choose . | | \*### |
|  | |  |
| Click on .  Maybe you need to scroll down to find your Purchase Order. | |  |
|  | |  |
| Reminder: In Step 11 you had the following overview. What is the difference to you screen now? Try to explain! | |  |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |  |
|  | |  |
| Choose . You will see your 100 delivered Chain Locks, maybe you need to scroll down. | |  |
|  | |  |
| Choose the tab . There you will see further activities regarding your order. | |  |
| You see, that an invoice was created. Click at . | |  |
|  | |  |
| You will see the financial document, which was created when you have created the supplier invoice. | |  |
|  | |  |
| Click on the home icon  to return to the Fiori Launchpad overview. | |  |
|  | |  |

|  |  |  |
| --- | --- | --- |
|  | Step 16: Display Document Flow | |
| **Task** Display the document flow.  **Short Description** Review goods receipt document and the document flow of your material  **Name (Position)** Wilton Saban (Inventory Supervisor) | | **Time** 5 min |
|  | |  |
| To display the document flow, use the app *Materials Document Overview*. | | Fiori App |
|  | |  |
| The app provides an overview of the material documents. You can find your purchase order by using your assigned number. Therefore, enter your material number **CHLK1###** in the field Material and then choose . | | CHLK1### |
|  | |  |
| Click on the line. | |  |
|  | |  |
| You will then see your material document information from step 12 as you confirmed the goods receipt. Click on the tab *Document Flow*. | |  |
|  | |  |
| The document flow will be displayed. You can see the related purchase order. Maybe you need to click on , to see the related document numbers. | |  |
|  | |  |
| Click on the home icon  to return to the Fiori Launchpad overview. | |  |
|  | |  |

|  |  |  |
| --- | --- | --- |
|  | Step 17: Create Goods Receipt for Purchase Order | |
| **Task** Create a goods receipt for a purchase order.  **Short Description** Receive into inventory the remaining stock items ordered from Mid-West Supply in the prior step. A goods receipt document will be created referencing our purchase order thereby ensuring that we receive the products ordered within the timeframes requested and in quality condition. Goods on hand will be increased and an accounting document will be generated recognizing the value associated with these goods.  **Name (Position)** Tatjana Karsova (Receiving Clerk) | | **Time** 5 min |
|  | |  |
| To create a goods receipt for a purchase order, use the app *Post Goods Receipt for Purchase Order*. | | Fiori App |
|  | |  |
| You will see the following screen *Goods Receipt*. | |  |
|  | |  |
| Choose the **F4** help in the field *Purchase Order*. | | F4 |
| In the screen *Select: Purchase Order* click on  and enter your three-digit number \*### in the search field. Click on . | | \*### |
| Search for your material **CHLK1###** and select it with a double click. Now, only one order is shown. Select it with a double click. | | CHLK1### |
|  | |  |
| The following screen will appear. You should now see only one line. Click in the field of Storage Location. | |  |
|  | |  |
| Select the available Storage Location **TG00 (Trading Goods)**. | |  |
|  | |  |
| For further information and to check, if all entries are correct, click on . | |  |
| Select **Delivery Completed** and click on . | | Delivery Completed |
|  | |  |
| Back in the screen *Goods Receipt* select your item and click on . | |  |
| You should receive the following message, which includes your material document number. | | Material Document Number |
|  | |  |
| Click on the home icon  to return to the Fiori Launchpad overview. | |  |
|  | |  |

|  |  |  |
| --- | --- | --- |
|  | Step 18: Display Purchase Order History | |
| **Task** Display the purchase order history  **Short Description** Review the status for the PO for Chain Locks. A PO history tab is created within the PO once a transaction has taken place against the order number to support this functionality.  **Name (Position)** Wilton Saban (Inventory Supervisor) | | **Time** 10 min |
|  | |  |
| To display the stock list for your purchase order, use the app *Manage Stock*. | | Fiori App |
|  | |  |
| In the drop-down menu choose the plant Miami (**MI00**). To find your material document number use the **F4** help in the material field. | | MI00  F4 |
|  | |  |
| Click on  and enter you three-digit number \*### into the search field. Afterwards click on  to see all material. | | \*### |
| Scroll down until you found you material **CHLK1###** and choose it with a double click. | | CHLK1### |
|  | |  |
| The stock increased from 100 to 200. Can you explain why?  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |  |
|  | |  |
| To get further information about the current stock of your material, click on . | |  |
| Click on  for the Stock History of the plant Miami. | |  |
|  | |  |
| You can now see the graphical overview. | |  |
|  | |  |
| To which stock type is your material assigned?  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |  |
| Click on the home icon  to return to the Fiori Launchpad overview. | |  |
|  | |  |

|  |  |  |
| --- | --- | --- |
|  | Step 19: Create Invoice Receipt from Vendor | |
| **Task** Create an invoice receipt from a vendor.  **Short Description** Enter an invoice received from Mid-West Supply for 3,200.00 USD associated with the recent PO and goods receipts. This invoice will be posted to an existing G/L account in your Chart of Accounts and saved as an Accounts Payable to Mid-West Supply. It will be settled by issuing a check to Mid-West Supply at a later date. The invoice is presented below in order to support your making the necessary journal entry.    **Name (Position)** Silvia Cassano (Accounts Payable Specialist) | | **Time** 5 min |
|  | |  |
| To create an invoice receipt from your vendor, use the Fiori app: *Create Supplier Invoice – Advanced.* | | Fiori App |
|  | |  |
| Enter Company Code **US00**. and confirm with . | | US00 |
|  | |  |
| Enter **today´s date** for Invoice Date. Check if the Company Code **US00** is selected. Enter the amount of the invoice (**3.200,00**) and choose **XI** in the field next to tax amount. Furthermore, enter **INVOICE 00515-###** in the text field and click on Enter. | | Today´s date  US00  3.200,00  XI  INVOICE 00515-### |
|  | |  |
| Choose in the lower section the tab *PO Reference*. | |  |
| Enter (or find with F4 help and your supplier as Invoicing Party) **your PO number** in the middle of the screen (next to the drop-down field with Purchase Order/Scheduling Agreement) and press Enter.  Enter **TX0000000** in the Jurisd. Code field and mark the checkbox for **Booking OK** only for the second line. | | your PO number  TX0000000  Booking OK |
|  | |  |
| Use the  button to see if the postings are correct. | |  |
|  | |  |
| Finally, click on  or on  and then on  to post your invoice receipt. The system will generate a unique number for this document. | | Invoice document number |
|  | |  |
| Click on the home icon  to return to the Fiori Launchpad overview. | |  |
|  | |  |

|  | Step 20: Post Payments to Vendor | |
| --- | --- | --- |
| **Task** Post payments to a vendor.  **Short Description** Issue a payment to your Mid-West Supply vendor to settle their entire Accounts Payable balance. Note that the amount due to them includes both of the invoices that you have previously entered. A journal entry is made to Accounts Payable for Mid-West Supply and to the bank checking account in the G/L.  **Name (Position)** Silvia Cassano (Accounts Payable Specialist) | | **Time** 5 min |
|  | |  |
| To post payments to a vendor, use the app *Post Outgoing Payments*. | | Fiori App |
|  | |  |
| In the screen *Post Outgoing Payments* enter the Global Bike Inc. (**US00**) for Company Code, **today´s date** for Posting Date and Journal Entry Date. Enter **INVOICE ###** in the field Reference, the **current period**, for G/L Account **100000** and the Amount of your total invoice **6.400,00 USD**. | | US00  today´s date  INVOICE ###  Current period  100000  6.400,00 USD |
| Check if **KZ (Vendor Payment)** is selected for Journal Entry Type and compare your screen with the one below. | | KZ (Vendor Payment) |
|  | |  |
| In the section *Open Item Selection* use the **F4** help to search for your supplier **Mid-West Supply**. | | Mid-West Supply |
| Then click on . | |  |
| In the top right corner, you see, that the balance amounts 6,400.00 USD. | |  |
|  | |  |
| Have a look at the tab *Open Items*, where the delivery you have split is listed. To pay for both click on  in every line. | |  |
|  | |  |
| Check, that both lines are marked as clear. | |  |
|  | |  |
| Now, the balance should amount 0,00 USD. | |  |
| Finally, click on  to pay your invoice to Mid-West Supply. The system generates a Journal Entry Number for your payment.  Then click on  to see your Journal Entry. | | Journal Entry Number |
|  | |  |
| Which bank accounts where used? Try to explain! | |  |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |  |
|  | |  |
| Click on the home icon  to return to the Fiori Launchpad overview. | |  |
|  | |  |

|  | Step 21: Display Supplier Balances | |
| --- | --- | --- |
| **Task** Display the supplier balances.  **Short Description** Display and confirm the activity and associated balance for the Accounts Payable for Mid-West Supply. You should see both a credit and debit posting indicating the receipt of the two invoices and the issuance of a single payment to settle this balance due to Mid-West Supply.  **Name (Position)** Shuyuan Chen (Chief Accountant) | | **Time** 5 min |
|  | |  |
| To display the supplier balances, use the app *Display Supplier Balances*. | | Fiori App |
|  | |  |
| Use the **F4** help in the field Supplier and enter **\*###** into the Search Term. Then press . | | \*### |
| Scroll down to your supplier **Mid-West Supply**, select it and click on . | | Mid-West Supply |
|  | |  |
| Back in the screen *Manage Supplier Balances* enter **US00** for company code and the **current year** in fiscal year. Then click on . | | US00  current year |
|  | |  |
| You get the following overview of your supplier balances. | |  |
|  | |  |
| Click on the home icon  to return to the Fiori Launchpad overview. | |  |
|  | |  |

|  | Step 22: Display Purchase Order History | |
| --- | --- | --- |
| **Task**  Display the purchase order history  **Short Description** Review the status of POs for Chain Locks. The PO history tab is updated once a transaction has taken place against the order number.  **Name (Position)** Wilton Saban (Inventory Supervisor) | | **Time** 5 min |
|  | |  |
| To display the purchase order history, use the Fiori App *My Purchasing Document Items*. | | Fiori App |
|  | |  |
| The app provides all information regarding purchase requisitions, purchase orders and good receipts. | |  |
|  | |  |
| Enter **###** in the search field and press . | | ### |
|  | |  |
| Click on .  Maybe you need to scroll down to find your Purchase Order. | |  |
|  | |  |
| Click on . Maybe you need to scroll down to find your Goods Receipt. The other 100 Chain Locks have been delivered. | |  |
|  | |  |
| Click on . Maybe you need to scroll down to find your Goods Receipt. Both invoices are displayed. To see further information about the invoices, click on | |  |
|  | |  |
| Click on the home icon  to return to the Fiori Launchpad overview. | |  |
|  | |  |

|  | Step 23: Display/Review G/L Account Balances and Individual Line Items | |
| --- | --- | --- |
| **Task** Display/review the G/L account balances and the individual line items.  **Short Description** Display and confirm by individual account number the activity and associated balances for several accounts in your G/L.  **Name (Position)** Shuyuan Chen (Chief Accountant) | | **Time** 5 min |
|  | |  |
| To display G/L account balances use the Fiori App *Display Financial Statement*. | | Fiori App |
|  | |  |
| In the screen *Financial Statement* enter **US00** for Company Code, **0L** for Ledger and **G000** for Statement Version. Check if Statement Type is set as **normal,** the **current period** is set for End Period and the Comparison End Period is **1/2016**. Compare with the screen below and press . | | US00  0L  G000  normal  current period  1/2016 |
|  | |  |
| Open all subfolders. Which bank account did you use in the previous steps?  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |  |
| With this app you can see all bank accounts of GBI US. | |  |
|  | |  |
| **Please consider:** All members of this course are booking the same US bank account. Therefore, the number next to the bank account 100000 you used may vary. | |  |
|  | |  |
| Click on the home icon  to return to the Fiori Launchpad overview. | |  |
|  | |  |

|  |  |  |
| --- | --- | --- |
|  | Learning Snacks | |
|  | |  |
| In order to test and consolidate your knowledge use the app *Learning Snack MM.* | | Fiori App |
|  | |  |
|  | |  |
| You see all the snacks for the individual case studies. Select the Snack *MM English* and answer all seven questions. | | Learning Snack |
| **Hint:**  If you do not see any Apps, you need to change the language on the page Learning Snacks. Therefore click on the current language right next to *change language* and choose **English**. | |  |
| When you have answered all the questions you will receive a success message and your placement. | |  |
|  | |  |
|  | |  |

|  |  |  |
| --- | --- | --- |
|  | MM Challenge | |
| **Learning objective** Understand and perform a Material Management process. | | **Time** 75 Min |
| **Motivation** After you have successfully worked through the material management case study, you should be able to solve the following task on your own.  **Scenario** A new Security Chain Lock is available on the market and you want to add it to your inventory. This security chain lock has the same characteristics as the created Chain Lock, with a price of 50.00 USD. To create the new Security Chain Lock, use the Chain Lock created previously to Copy from. Select CHLK2### as material number. Based on your inquiry of 300 pieces the Mid-West Supply gives a new offer to the price of 26.00 USD per piece. The Dallas Basic Bike gives an offer of 25.50 USD. Please choose the best offer and order the material. Then pay the delivery.  **Advice** You can use this case study as guidance since it is based on the same process. However, it is recommended that you solve it without any help in order to test your acquired knowledge. | | |
|  | |  |
|  | | |