

# **Quality Management in Procurement (QM)**

This case study explains how quality management can be integrated in a sales and distribution process during procurement and thus fosters a thorough understanding of each process step and underlying SAP functionality.

#### **Product**

S/4HANA 2022 Global Bike

Fiori 3.0

#### Level

Beginner

#### **Focus**

**Quality Management** 

#### **Authors**

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#### Version

4.2

#### **Last Update**

August 2023

#### **MOTIVATION**

The purpose of this assignment is that you become familiar with the quality management in sales and Distribution

#### **PREREQUISITES**

Before you use this case study, you should be familiar with navigation in the SAP system.

You should have completed the Navigation exercise and have read the GB Story prior to starting this assignment.

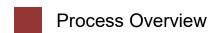
#### **NOTES**

This case study uses the Global Bike data set, which has exclusively been created for SAP UA global curricula.

This material was prepared with the assistance of the BSIS 420/620 students at CSU Chico.







**Learning Objective** Understand and perform a Quality Management Process integrated in an Order-To-Cash Process.

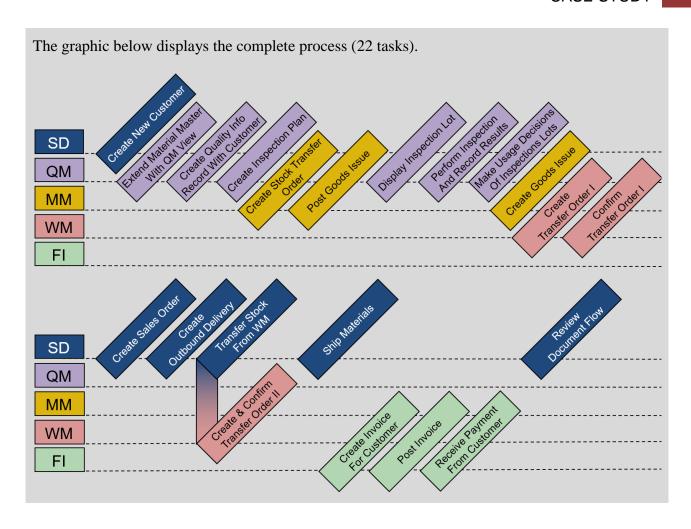
Time 160 min

Scenario While receiving Material, you need to check the quality in order to sell high value goods. You will take on different roles within the Global Bike Inc. to perform a quality inspection on newly arrived goods and complete a Sales and Distribution process with them. You work for example as a warehouse worker, accounting clerk and sales agent. You will get insight in the Sales and Distribution (SD), the Materials Management (MM), the Financial Accounting FI and CO) and the Warehouse Management (WM) departments.

Employees involved Catherine Dubios (Sales Representative US West)

Ricardo Robles (Warehouse Supervisor)
Sanjay Datar (Warehous Employee)
Juriko Hamada (Good Issue Clerk)
Yoshi Agawa (Goods Receipt Clerk)
Sunil Gupta (Warehouse Employee)
Karl Gruber (Sales Person 2 US West)
Zarah Morello (Good Issue Clerk)
Stephanie Bernard (AR Accountant)

You start the process by creating a new customer (Quality Bikes). They will order Bikes from Global Bike. Beforehand some goods are transferred from Dallas to San Diego. Before leaving the warehouse in Dallas, a quality inspection is performed. Afterwards they are moved to San Diego from where they are sold and sent to your customer.



## Table of Contents

Process Overview	2
Step 1: Create New Customer	5
Step 2: Extend Material Master with QM View	13
Step 3: Create Quality Info Record with Customers	17
Step 4: Create an Inspection Plan	19
Step 5: Create Stock Transport Order	24
Step 6: Post Goods Issue	26
Step 7: Display the Inspection Lot	28
Step 8: Perform Inspection and Record Results	30
Step 9: Make Usage Decisions of Inspection Lots	32
Step 10: Create Goods Receipt	34
Step 11: Create Transfer Order	36
Step 12: Confirm Transfer Order I	38
Step 13: Create Sales Order	39
Step 14: Create Outbound Delivery	41
Step 15: Change Outbound Delivery	42
Step 16: Transfer Stock from Warehouse Management	44
Step 17: Confirm Transfer Order II	
Step 18: Ship Materials	48
Step 19: Create Invoice	50
Step 20: Post Invoice	52
Step 21: Receive Payment from Customer	53
Step 22: Review Document Flow	55



## Step 1: Create New Customer

Task Create a new customer.

Time 10 min

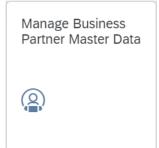
**Short Description** Use the SAP Fiori Launchpad to create a new customer.

Name (Position) Catherine Dubios (Sales Representative US West)

In this case study, we will create the master data for a new customer. Two types of customer data are stored about a customer – sales data and accounting data. The customer master data is created in three groups, or views – general, accounting, and sales. Customers can be created centrally, meaning that all views are generated concurrently, or responsibility can be distributed so that different personnel in the accounting and sales areas are responsible for creating and maintaining the data in their respective views. For this exercise, central creation will be used to enter all of the needed data to define a new customer.

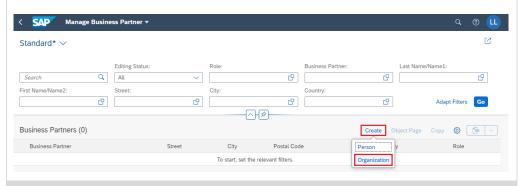
To create a new customer, click in the *Quality Management* area in the role Sales Representative US West on the app Manage Business Partner Master Data.

Fiori App



On the *Manage Business Partner* screen, select the button Create. A submenu will open. Click **Organization** here.



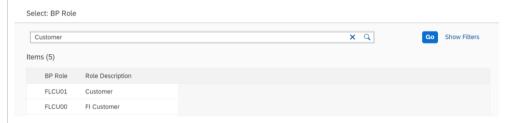


**Note** The business partner is created superordinate and assigned roles (for example customer, vendor). The different roles are created at specific organizational levels (company code, sales area). Business partners can be categorized as a person, group, or organization, as follows:

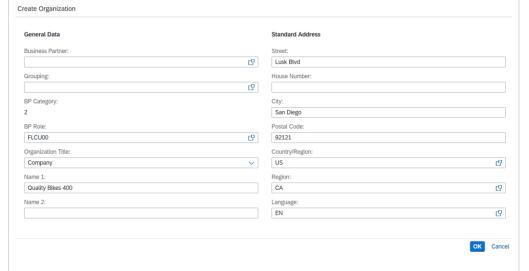
 An organization represents units, such as a company (for example, a legal person), parts of a legal entity (for example, a department) or an association. Organization is an umbrella term to map every kind of situation in the day-to-day business activities.

A group represents a shared living arrangement, a married couple, or an executive board.

On the *Create Organization* screen, in the field *BP Role* click the input help icon . In the pop-up that opens, search for **Customer** and then select the entry **FLCU00** | **FI Customer**.



Back on the *Create Organization* screen, please add the following information. As *Organization Title* choose **Company**, and as *Name 1* enter **Quality Bikes** ###. Remember to replace your three-digit number for ###, e.g. if your number is 003, please enter 003. Further, as *Street* enter **Lusk Blvd**, and as *City* enter **San Diego** (with the *Postal Code* **92121**). In the field *Country*, please enter **US**, and choose **CA** as *Region*. Finally, for *Language* select **EN**. Confirm your entries with ok.



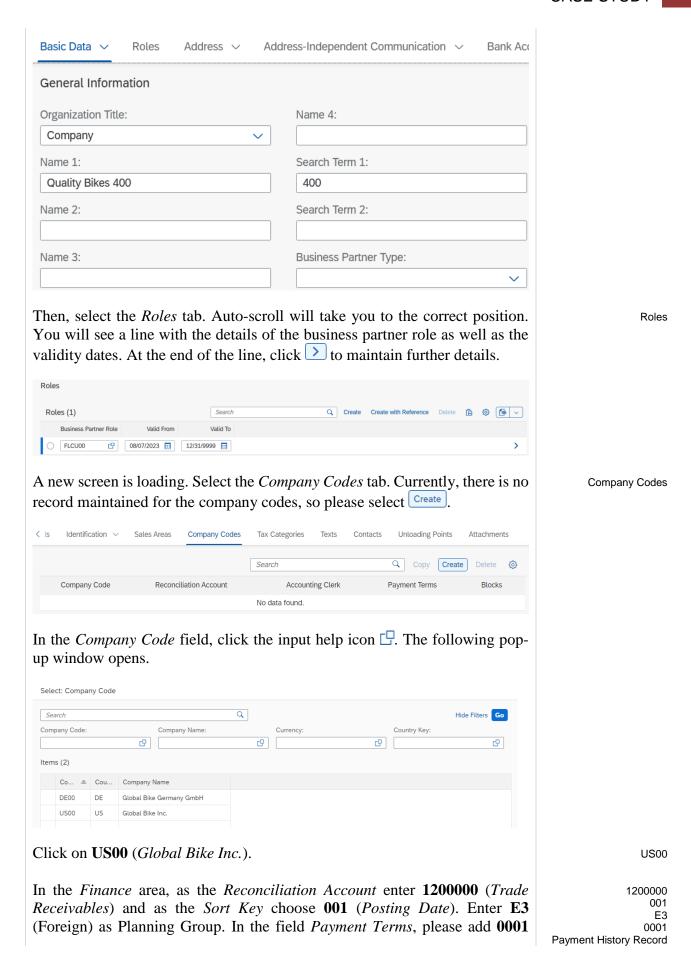
A new overview is generated. Make sure that you have selected the *Basic Data* tab. In the *General Information* area, in the field Search Term 1 add your three-digit number ###.

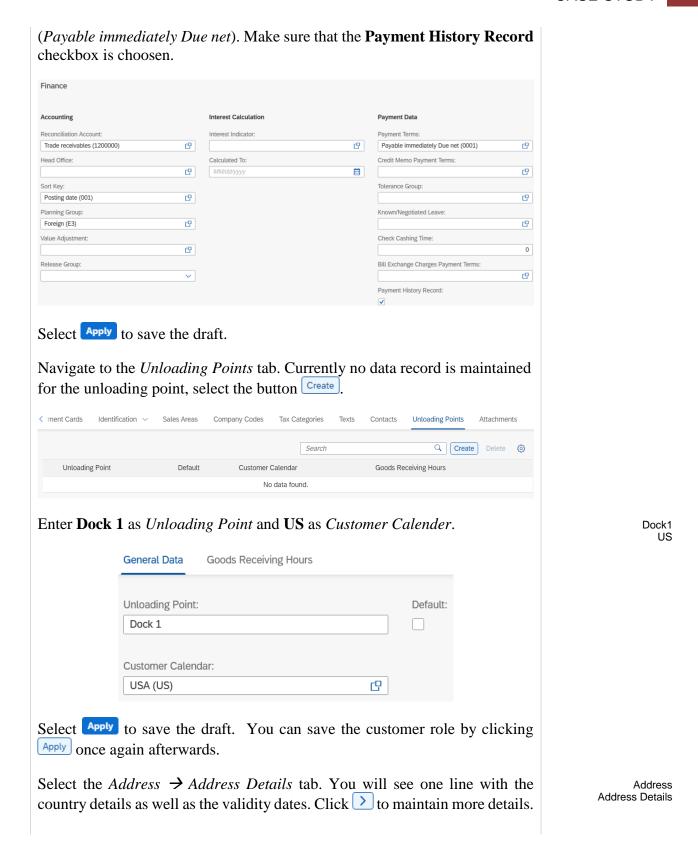
Customer FLCU00 | FI Customer

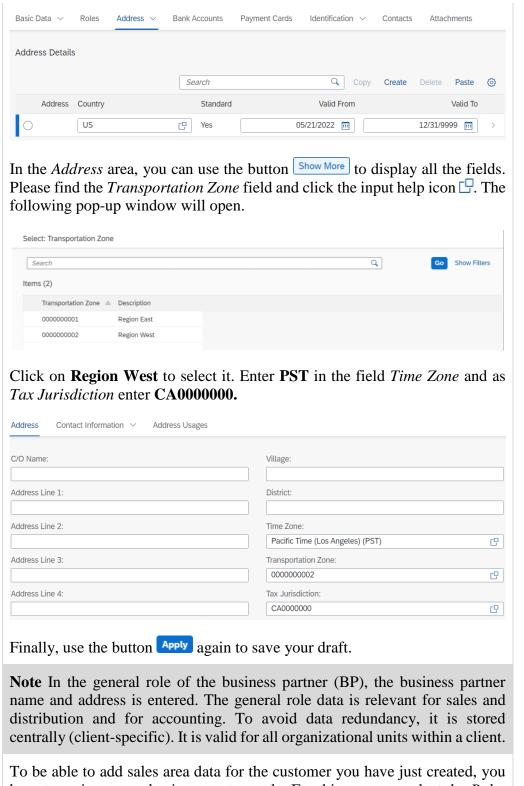
Company Quality Bikes ### Lusk Blvd San Diego 92121 US CA EN

Basic Data

###





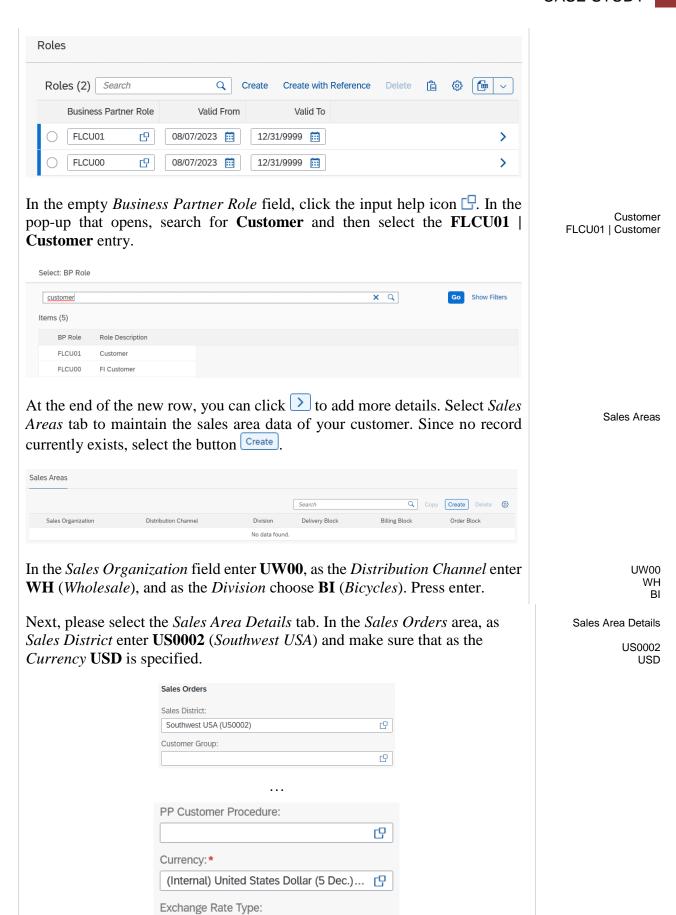


Transportation Zone

Region West

PST CA0000000

have to assign a new business partner role. For this purpose, select the Roles tab. There, choose Create again to create a new row for another Business Partner Role.



C

In the Billing area, as the Incoterms type in **FOB** (Free on Board) and as the Incoterms Location 1 San Diego. In the Payment Terms field, please add 0001 (payable immediately due net).

FOB San Diego 0001

Incoterms

Note Incoterms (abbreviation for International Commercial Terms) are internationally accepted terms of delivery published by the International Chamber of Commerce (ICC) for international commercial law.

Billing	
Invoice Dates:	
	G
Incoterms Version:	
	G
Incoterms:	
Free on board (FOB)	G
Incoterms Location 1 ID:	
	G
Incoterms Location 1:	
San Diego	
Payment Guarantee Procedure:	
	G
Payment Terms:	
Payable immediately Due net (0001)	G

Subsequently, fill in data for the *Shipping* area. In the fields *Delivery Priority* and Shipping Conditions, use the drop-down lists to select Normal item and Standard in chronological order. As the Delivery Plant enter SD00 (San

> Shipping Delivery Priority: Normal item Delivery Plant: SD00 C Shipping Conditions: Standard Order Combination:

Diego).

Normal item Standard SD00

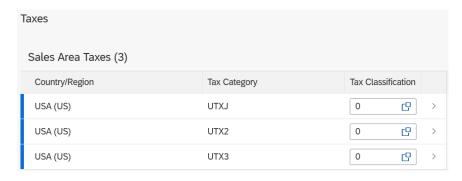
In the Accounting area, as the Account assignment group select **Domestic Revenue**. In the following Partial Deliveries area, in the field Partial Delivery Per Item, please use the drop-down list and select **Partial delivery allowed**. Last but not least, enter data for the final area of this tab, Pricing and Statistics. In the Price Group field, use the drop-down list to select **Bulk buyer** and as the Customer Pricing Procedure enter **1** (Standard). Compare your entries with the following screenshots and confirm your entries with enter.

Domestic Revenue
Partial delivery allowed
Bulk Buyer

	Accounting		
	Account assignment grou		
	Domestic Revenues	~	
Partial Deliveries		Pricing and Statistics	
Partial Delivery Per Item	n:	Price Group:	
Partial delivery allowe	d v	Bulk buyer	~
Complete Delivery Requ	uired:	Customer Pricing Procedure: Standard (1)	G

Then, please select the Taxes tab. For all three tax categories choose the Tax Classification 0 (Exempt).

Taxes



Select Apply to save your adjustments as a draft. Then press Apply again to finish editing the customer role. To finally save the business partner, use the button in the lower screen area.

The SAP system will create the master data record for the new BP and assign a unique business partner number. Write down the BP number, which you can find in the header area.

Click on the home icon to go to the Fiori Launchpad Overview.

Ш



message.

## Step 2: Extend Material Master with QM View

Task Extend material master with QM view.

Time 15 min

**Short Description** Use the SAP Fiori Launchpad to extend a material master record for a Bike to add data for the quality management view.

Name (Position) Ricardo Robles (Warehouse Supervisor)

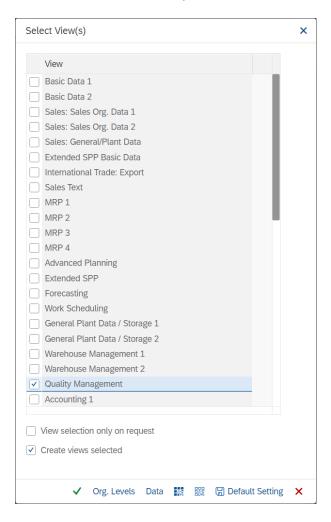
To create a finished good material master record, click in the <i>Quality Management</i> area in the role <i>Warehouse Supervisor</i> on the app <i>Create Material</i> .	Fiori App
Create Material	
This will produce the following screen.	
Create Material (Initial Screen)	
Menu ✓ Select View(s) Org. Levels Data	
Makawiala	
Material: Industry Sector:	
Material Type:	
Change Number:	
Copy from	
Material:	
In the Material field, type in <b>ORWN1</b> ### (replace ### with your number) and select <b>Mechanical Engineering</b> as an Industry sector.	ORWN1### Mechanical Engineering
Then, click on Continue or press Enter to proceed. Confirm any warning	

On the following popup, select the view *Quality Management* by clicking on the square in front of the row.

Quality Management

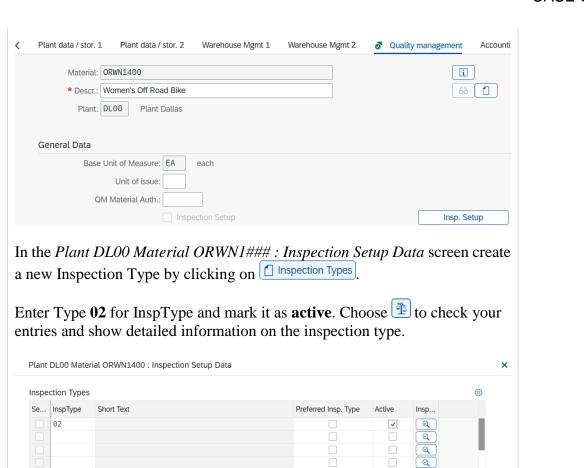
Create views selected

Also, select **Create views selected**. Then, click on .



On the *Organizational Levels* screen, enter plant **DL00** (Dallas). Then, click on .

Organizati	onal levels				
	Plant: DL00				
	Org. le	vels/profiles on	ly on request		
			<b>✓</b>	Select View(s)	☐ Default Setting

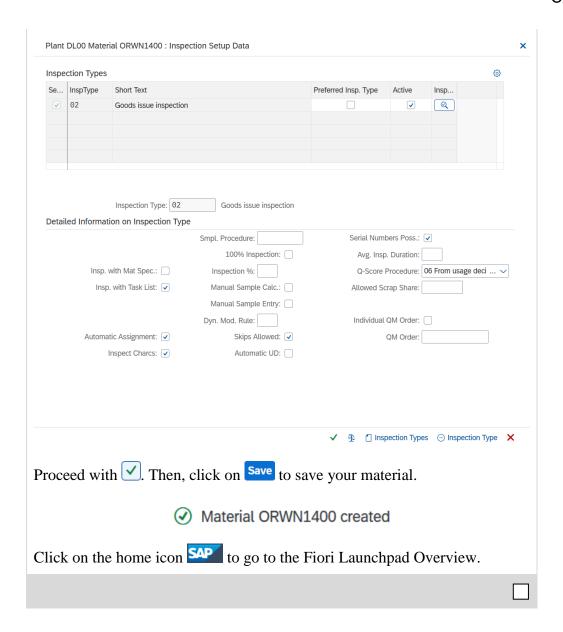


02 Active

In the detailed information uncheck **Automatic UD** and compare the screen with the screenshot below.

Detailed Information on Inspection Type

Automatic UD - unchecked





## Step 3: Create Quality Info Record with Customers

**Task** Create a quality info record with customers.

Time 5 min

**Short Description** In this task, you create a quality information record with the customer.

Name (Position) Ricardo Robles (Warehouse Supervisor)

To create a quality info record, click in the *Quality Management* area in the role *Warehouse Supervisor* on the app *Create Quality Info Record – Sales*.

Fiori App



**Note** If a quality assurance agreement or a vendor release is required for a material, you must create a quality information record (quality info record). The quality info record determines how the material can be processed further.

This will produce the following screen.



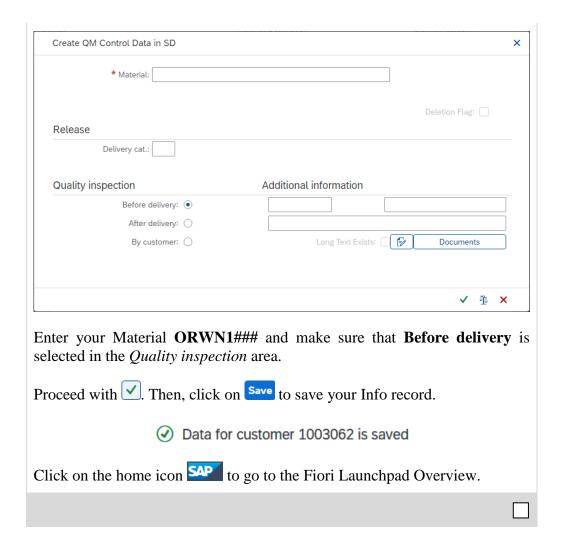
If your customer number is not entered by default, then search for your new customer using the F4 help with search term ###.

Enter **UW00** as Sales Organization and proceed with Enter.

Click on New Info Record button on the application tool bar. This should produce the following screen:

###

UW00



ORWN1### Before delivery



## Step 4: Create an Inspection Plan

Task Create an inspection plan.

Time 5 min

**Short Description** In this task, you create an inspection plan for the material you created.

Name (Position) Ricardo Robles (Warehouse Supervisor)

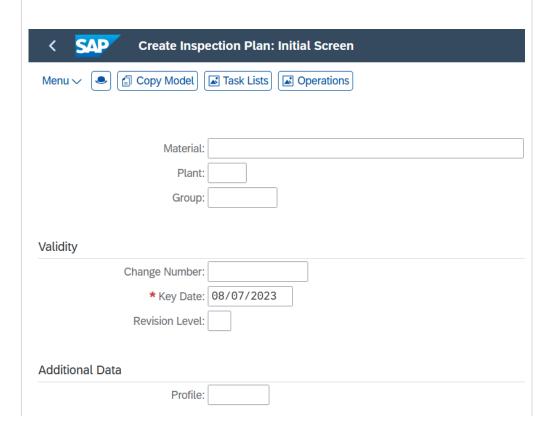
To create an inspection plan, click in the *Quality Management* area in the role *Warehouse Supervisor* on the app *Create Inspection Plan*.

Fiori App

Create Inspection Plan

**Note** With the help of an inspection plan, you describe how a quality inspection of one or more materials should run. In the inspection plan, you specify the order in which certain inspection procedures are carried out and which inspection characteristics are to be checked against which specifications

This will produce the following screen.

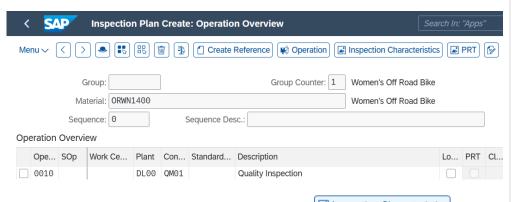


Enter your Material **ORWN1**### and the plant **DL00**. Set the Key date to the **current date**. Click Enter.

In the *Create Inspection Plan: Header Details* screen enter **6** as Usage and **4** as Overall Status. Further Enter the From Lot Size **0**. Compare your entries with the following screen and proceed by choosing Operations.

Create Inspection Plan: Header Detail	Search In: "Apps"
Menu ✓ 〈 〉 🖟 🖾 Task Lists 🔊 Material Assignment	nt Operations
Group: ORWN1400	Group Counter: 1 Women's Off Road Bike  Women's Off Road Bike
Task List	
Group:	
* Group Counter: 1 Women's Of	f Road Bike
* Plant: DL00	Long Text Exists:
	Long Text Exists:
General Data	Long Text Exists:
General Data  Deletion Flag:	Long Text Exists:
General Data  Deletion Flag:  * Usage: 6	Long Text Exists:
Deletion Flag: Usage: 6 * Overall Status: 4	Long Text Exists:
Deletion Flag:   * Usage: 6  * Overall Status: 4  Planner Group:	Long Text Exists:
Deletion Flag:   * Usage: 6  * Overall Status: 4  Planner Group:   Planning Work Center:	Long Text Exists:   Lot Size To: 99,999,999 EA

On the *Inspection Plan Create: Operation Overview* Screen enter for Operation 0010 the Control Key **QM01** and the Description **Quality Inspection**.



Select the line for Operation 0010 and choose Inspection Characteristics. On the Create Inspection Plan: Characteristic Overview fill in the following data for Charc No.10. Select the checkbox for Ql. Enter PACK as Master Insp. Char. and enter Packing OK as Short Text Charc.

lr	ารเ	pection	n charact	eristi	CS					
		Cha	Preset I	Qn	Ql	Master In	Plant	Version	R	Short Text Charc
[		10			<b>✓</b>	PACK	DL00			Packing OK

ORWN1### DL00 current date

> 6 4 0

QM01 Quality Inspection

> QL Pack Packing OK

Upon pressing Enter you should get the *Edit Characteristic Control Indicators* screen. If not select the line with Char. 10 and click on Control Indicators

Select the checkboxes for *Charc. Attribute*, *Sampling Procedure*, *Summary Recording* and *Required Characteristic*. Afterwards proceed by clicking on

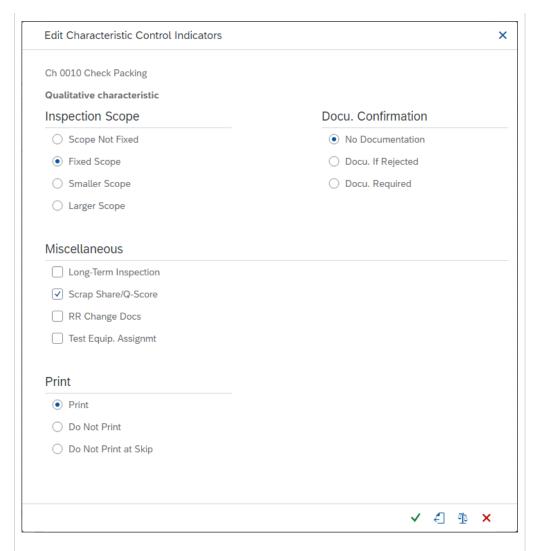
Charac. Attribute Sampling proc. Summ.Recording Required Charact.

Edit Characteristic Control Indicators		
Ch 0010 Check Packing		
Qualitative characteristic		
Туре		
	✓ Charc Attribute	
Sample		
✓ Sampling Procedure	Additive Sample	
SPC Characteristic	<ul><li>Destructive Insp.</li></ul>	
SPC Characteristic Record No. of Defs	Destructive Insp.	
	Destructive Insp.	
Record No. of Defs	Destructive Insp.	
Record No. of Defs  Results Confirmation		
Record No. of Defs  Results Confirmation  Summ. Recording	Required Charc	
Record No. of Defs  Results Confirmation  Summ. Recording Single Result	<ul><li>Required Charc</li><li>Optional Charc</li></ul>	
Record No. of Defs  Results Confirmation  Summ. Recording Single Result No Charc Recording	<ul><li>Required Charc</li><li>Optional Charc</li><li>After Acceptance</li></ul>	
Results Confirmation  Summ. Recording Single Result No Charc Recording Classed Recording	<ul><li>Required Charc</li><li>Optional Charc</li></ul>	
Record No. of Defs  Results Confirmation  Summ. Recording Single Result No Charc Recording	<ul><li>Required Charc</li><li>Optional Charc</li><li>After Acceptance</li></ul>	
Results Confirmation  Summ. Recording Single Result No Charc Recording Classed Recording	<ul><li>Required Charc</li><li>Optional Charc</li><li>After Acceptance</li></ul>	
Results Confirmation  Summ. Recording Single Result No Charc Recording Classed Recording	<ul><li>Required Charc</li><li>Optional Charc</li><li>After Acceptance</li></ul>	

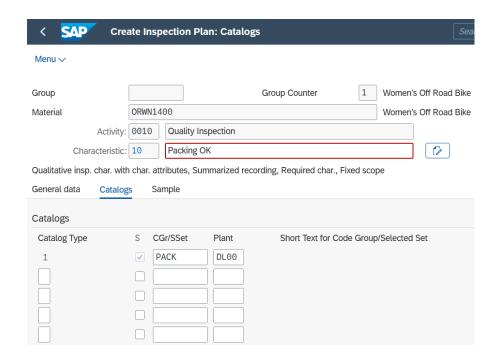
A second view for Control Indicators pops up.

Select *Fixed Scope*, *No Documentation*, *Scrap Share/Q-Score* and *Print*. And Proceed with .

Fixed scope No documentation Scrap share/ q-score Print



In the *Create Inspection Plan: Catalogs* screen, enter **PACK** as CGr/SSet and **DL00** as Plant.

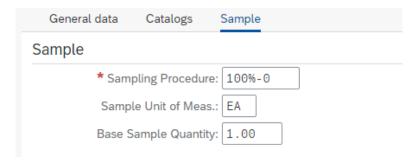


PACK DL00

Proceed with Enter or by clicking on Continue.

In the *Create Inspection Plan: Dynamic Modification* screen, enter **100% - 0** as Sampling Procedure. Further enter **EA** as Sample unit of meas.

100%-0 EA



Proceed with Enter or Continue and you are back in the *Create Inspection Plan:* Characteristics Overview screen.

Repeat the previous steps for Char. 20 using Master Insp. Charac. COLOR.

COLOR

Use the Short Text Insp. Char **Color OK** and make sure to enter **COLOR** as CGr/SSet in the *Create Inspection plan: Catalogs* screen.

Color OK COLOR

All the other data can be used as for char. 10 PACK.

Click on Save to save.

✓ Inspection plan with plan group 2 for material ORWN1400 is saved

Click on the home icon to go to the Fiori Launchpad Overview.

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## Step 5: Create Stock Transport Order

Task Create Stock Transport Order

Time 10 min

**Short Description** In this task, you create a Stock Transport Order for 10 Women's Off Road Bike from Dallas to San Diego

Name (Position) Sanjay Datar (Warehouse Supervisor)

To create a stock transport order, click in the *Quality Management* area in the role *Warehouse Supervisor* on the app *Create Purchase Order*.

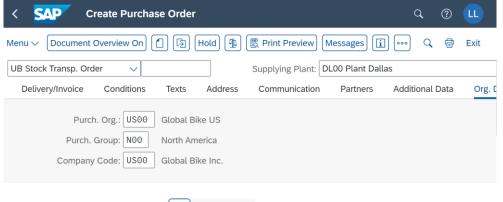
Fiori App

**Note** If the app is not displayed, search for it by using the search bar .



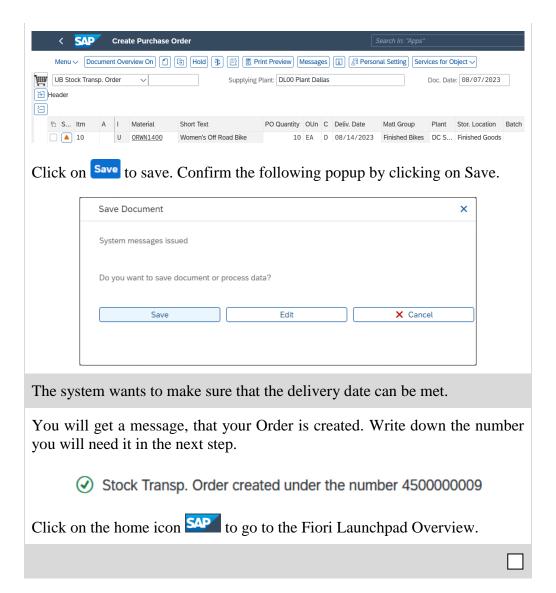
In the *Create Purchase Order* screen, enter **Stock Transp. Order** as Order Type. You will find Order Type next to the shopping cart UB Stock Transp. Order Supplying Plant choose **DL00**. In the Org. Data tab enter **US00** as Purchase Org., **N00** as Purch. Group and **US00** as Company Code.

Stock Transp. Order DL00 US00 N00 US00



Expand Items by clicking tem Overview. Enter the Material **ORWN1**### with a PO Quantity of **10**. The Delivery Date shall be **one week from today's date**. As Plant enter **SD00** and choose the Stor. Location **FG00**.

ORWN1### 10 One week from today SD00 FG00





## Step 6: Post Goods Issue

Task Create goods issue

Time 10 min

**Short Description** In this task, you ship the materials to San Diego by posting goods issue.

Name (Position) Juriko Hamada (Good Issue Clerk)

Posting goods issue reduces the inventory quantities and value in Dallas.

To post a goods issue, click in the *Quality Management* area in the role *Good Issue Clerk* on the app *Post Goods Movement*.

Fiori App



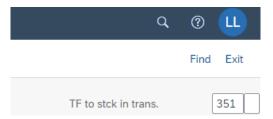
In the following Screen choose **Goods Issue** and **Purchase Order**. Enter in Purchasing Document Number **your Stock Transport Order Number** right to Purchase Order.

Goods Issue Purchase Order Order Number



Enter Movement type **351**. You will find the box to fill in on the top right of the screen. Proceed with Enter

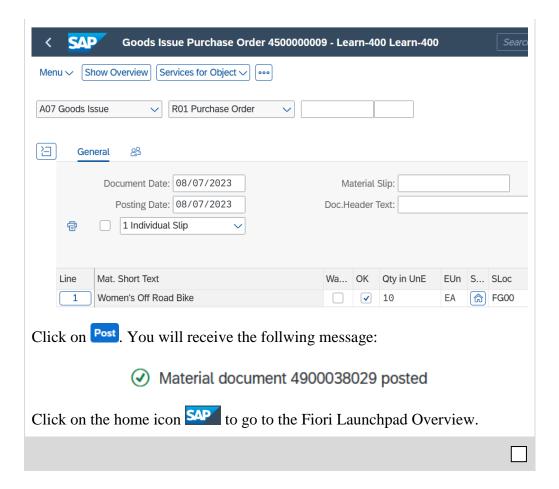
351



Your data from the stock transport order is copied to the line item section. Enter **FG00** as Storage Location and mark your line with the 10 Women's Off Road Bikes as **OK**. If the "Detail Data" section is active you have to make your entries there or close the section with a click on  $\Box$ .

FG00

Check - OK





## Step 7: Display the Inspection Lot

**Task** Display the Inspection Lot.

Time 10 min

**Short Description** In this task, you Display the Inspection Lot, which is created for the inspection.

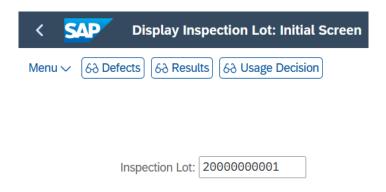
Name (Position) Juriko Hamada (Good Issue Clerk)

To display the created inspection lot, click in the *Quality Management* area in the role *Good Issue Clerk* on the app *Display Inspection Lot*.

Fiori App



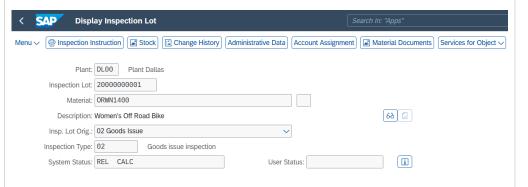
This will produce the following screen.



If your Inspection Lot is not filled automatically use the search  $\Box$  icon and enter your material number. Proceed with enter.

ORWN1###

You find yourself in the *Display Inspection Lot* screen.



In the *Data for Lot Origin* tab you find the source which created the inspection lot. In this case you find your previous created material documents.



## Step 8: Perform Inspection and Record Results

Task Perform the inspection and recording of the results

Time 5 min

**Short Description** In this task, you perform the inspection, you record the results, and you make the usage decision for the inspection lot.

Name (Position) Juriko Hamada (Good Issue Clerk)

To perform the inspection, click in the *Quality Management* area in the role *Good Issue Clerk* on the app *Record Inspection Results*.

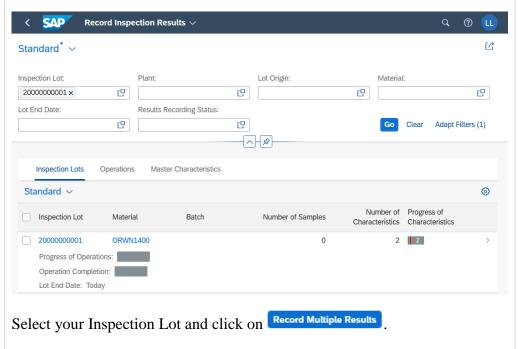
Fiori App



In the Record Inespection Results Screen enter the Number of your Inspection Lot.

Inspection Lot Number

Click on Go. This will produce the following screen:

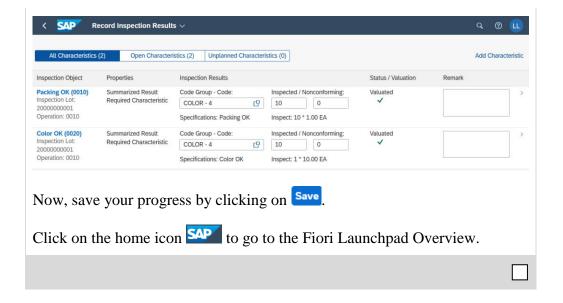


Select the code group **COLOR** with the code 4 (green) for both inspection objects using the value help symbol  $\Box$ . Then enter 10 as checked and 0 as faulty for both inspection objects.

The status should change to Valuated.

COLOR - 4

10





## Step 9: Make Usage Decisions of Inspection Lots

Task Make Usage Decisions on Inspection Lots

Time 10 min

**Short Description** In this task, you make usage decisions on the inspected lots that you performed in the previous step

Name (Position) Juriko Hamada (Good Issue Clerk)

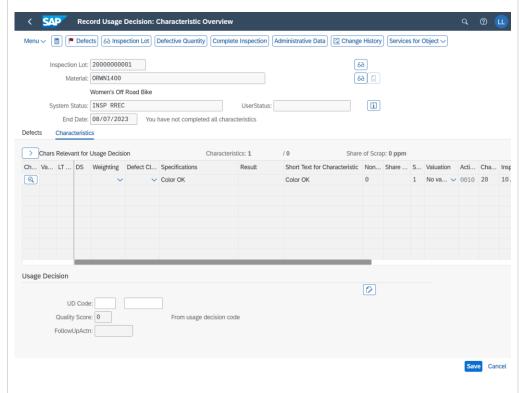
To perform the usage decision, click in the *Quality Management* area in the role *Good Issue Clerk* on the app *Record Usage Decision*.

Fiori App

Record Usage Decision

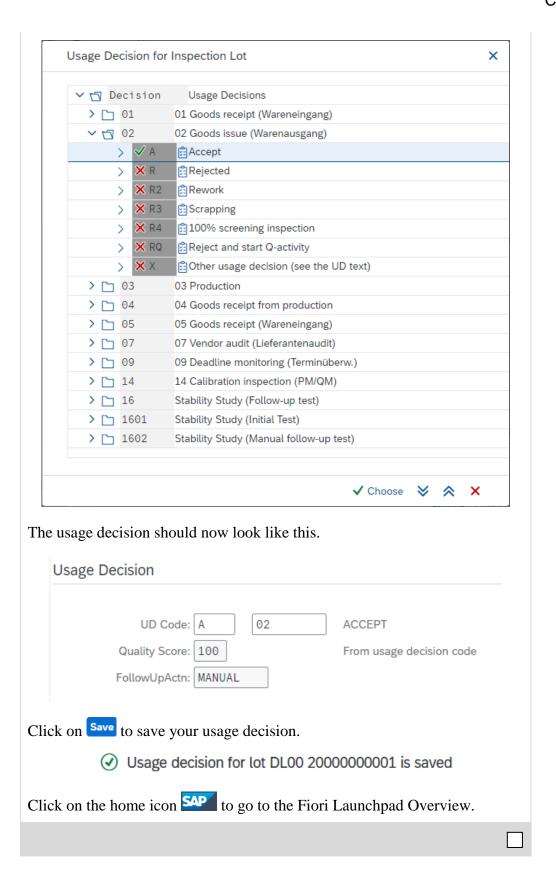
On the *Record Usage Decision: Initial Screen* choose your Inspection Lot and proceed with Enter to produce the following screen.

Inspection Lot



In the Usage decision section at the bottom, use the F4-Help to find the UD code for **Goods issue - Accept** and select it by clicking  $\checkmark$  Choose.

Goods issue Accept





## Step 10: Create Goods Receipt

#### Task Create Goods Receipts

Time 5 min

**Short Description** In this task, you receive the materials into San Diego.

Name (Position) Yoshi Agawa (Goods Receipt Clerk)

To create a goods receipt, click in the *Quality Management* area in the role *Goods Receipt Clerk* on the app *Post Goods Movement*.

Fiori App

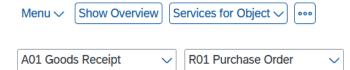


On the follwoing screen change the Trans./Event to **Goods Receipt**. As Reference Document, choose **Purchase Order**. You find both drop down menu on the top right.

Goods Receipt Purchase Order

Use the F4-Help or to choose your Purchase Order.

Your Purchase Order



Afterwards proceed by clicking execute ©.

If the Details data is active, close it by clicking on 🖹.

Enter the movement Type 101 and as Storage Location FG00. At last select the Item OK checkbox.

101 FG00 Item OK



© SAP UCC Magdeburg Page 34

4500000009

Click on the home icon to go to the Fiori Launchpad Overview.	



## Step 11: Create Transfer Order

#### Task Create a Transfer Order

Time 5 min

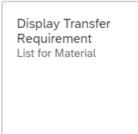
Short Description In this task, you create a transfer order for your materials.

Name (Position) Sunil Gupta (Warehouse Employee)

To create a transfer order, click in the *Quality Management* area in the role *Warehouse Employee* on the app *Display Transfer Requirement – List for Material*.

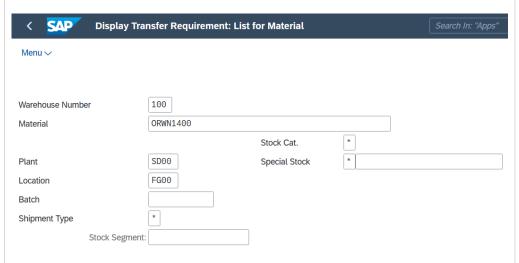
Fiori App

**Note** If the app is not displayed, search for it by using the search bar  $\square$ .

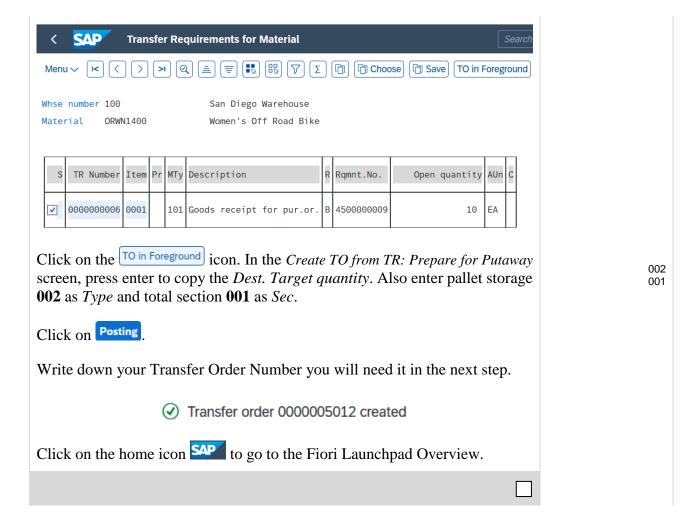


In the *Display Transfer Requirement: List for Material* screen, enter the Warehouse Number **100**, the Material **ORWN1**###, the Plant **SD00** and the Storage Location **FG00**. Proceed with enter.

100 ORWN1### SD00 FG00



In the *Transfer Requirements for Material* screen, select the row with goods receipt for purchase order.





# Step 12: Confirm Transfer Order I

Task Confirm Transfer Order I

Time 5 min

**Short Description** In this task, you create a transfer order for your materials.

Name (Position) Sunil Gupta (Warehouse Employee)

To confirm a transfer order, click in the *Quality Management* area in the role *Warehouse Employee* on the app *Confirm Transfer Order*.

Fiori App



If your Data is not filled in automatically in the screen *Confirm Transfer Order: Initial Screen*, enter for TO Number **your Transfer Order Number** for and the Warehouse Number **100**.

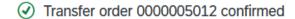
Your Transfer Order Number

Confirm Transfer Order: Initial Screen	1
Menu ✓ Standard Input List Pack	
* TO Number: 5012  * Warehouse Number: 100	

Proceed with Enter.

On the *Confirm Transfer Order: Overview of Transfer Order Items* screen, click on the Posting icon to post your transfer order.

You will receive the following message:



Click on the home icon to go to the Fiori Launchpad Overview.

Ш



# Step 13: Create Sales Order

Task Create a sales order.

Time 10 min

**Short Description** Use the SAP Fiori Launchpad to create a sales order.

Name (Position) Karl Gruber (Sales Person 2 US West)

To create a sales order, click in the *Quality Management* area in the role *Sales Representative US West* on the app *Manage Sales Orders*.

Fiori App



In *Manage Sales Order* Screen click on Create and then choose Create Sales Order VA01



In the *Create Sales Document* screen, enter the Order Type **OR**. As *Organizational Data*, enter the Sales Organization **UW00**, the Distribution Channel **WH** and the Division **BI**. Proceed with Enter.

OR UW00 WH BI

< SAP	Create Sales Documents
Menu ✓	
	* Order Type: OR
Organizational Data	а
Sales	Organization: UW00 US West
Distribu	tion Channel: WH
	Division: BI
	Sales Office:
	Sales Group:

PO-###

Current date

In the Create Standard Order: Overview screen, search your customer with Your Customer Number the F4-Help as Sold-To-Party. As Cust. Reference, enter PO-###. Enter the current date as Cust. Ref. Date. SAP **Create Standard Order: Overview** Menu ∨ 6∂ 🗐 🗒 🔀 Σ 🚥 Standard Order: Net Value: 0.00 Sold-to Party: 1003062 Ship-to Party: 1003062 Cust. Ref. Date: 08/08/2023 Cust. Reference: PO-400 In the All Items section enter the Material **ORWN1**### with an Order Quantity of **10**.

Req. Segment

Order Quantity

10

ORWN1###

Confirm your entries with enter and then Save with Standard Order 11 has been saved. Click on the home icon to go to the Fiori Launchpad Overview.

All Items

Item

Material

ORWN1400



## Step 14: Create Outbound Delivery

Task Create an Outbound Delivery.

Time 5 min

**Short Description** In this task, you prepare the material for shipment by creating an outbound delivery, which contains the storage location from which the materials will be picked, and the shipping point to which the material will be delivered for shipment.

Name (Position) Zarah Morello (Good Issue Clerk)

To create a sales order, click in the *Quality Management* area in the role *Good Issue Clerk* on the app *Create Outbound Deliveries From Sales Orders*.

Fiori App



In the search mask, enter your business partner number in the Ship-to party field.

business partner number

**Note**: Alternatively, if you have forgotten your BP number, click the value help icon in the Ship-to Party field. A pop-up will open. In the Name 1 field, enter \*### and San Diego as the City and press Go.

\*### San Diego

Select your customer and accept the entry with

In addition, enter **SD00** as the *shipping point* and remove the Planned creation date. Press <sup>Go</sup> to execute the search. The prepared sales order is displayed.

Select your sales order and choose the button Create Deliveries (1). You will see that the sales order is no longer available. You will receive a confirmation that your outbound delivery has been created.

Logs created: 1

Click on the home icon to go to the Fiori Launchpad Overview.



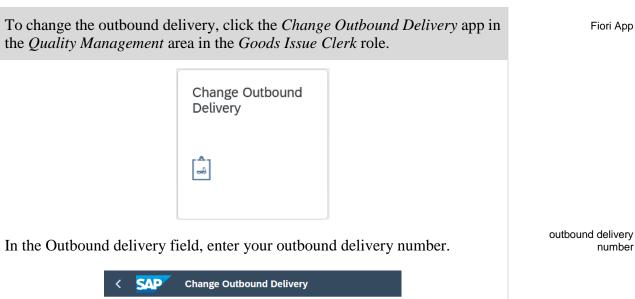
# Step 15: Change Outbound Delivery

Task Pick material . Time 5 min

Short Description Use the SAP Fiori Launchpad to pick materials

Name (Position) Zarah Morello (Good Issue Clerk)

To change the outbound delivery click the Change Outbound Delivery and in

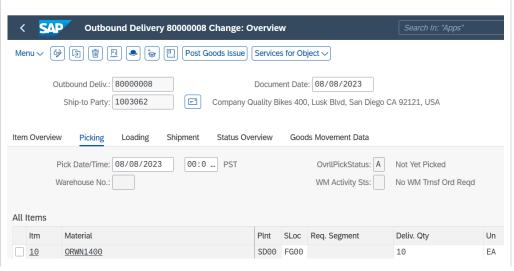


Outbound Delivery: 80000008

Click on Continue

Menu ✓ 🚱 🗓 🔊 Post Goods Issue

Select the picking area and enter FG00 as the storage location.



FG00

Save your delivery by clicking on Save. Write down your delivery number, you will need it in the following steps.	outbound delivery number
Outbound Delivery 80000008 has been saved	
Click on the home icon to go to the Fiori Launchpad Overview.	



## Step 16: Transfer Stock from Warehouse Management

Task Transfer stock from Warehouse Management.

Time 10 min

**Short Description** Use the SAP Fiori Launchpad to transfer stock from warehouse management.

Name (Position) Zarah Morello (Good Issue Clerk)

To transfer stock from WM, click in the *Quality Management* area in the role *Good Issue Clerk* on the app *Create Transfer Order – Outbound Delivery*.

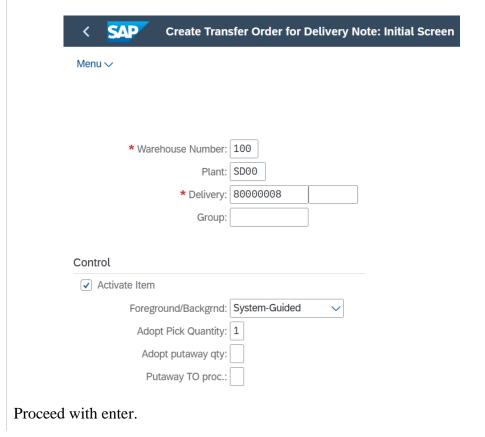
Fiori App



In the *Create Transfer Order for Delivery Note: Initial Screen*, enter the Warehouse Number **100**, the Plant **SD00** and search for **your Delivery Number** if not filled in automatically. Select the Checkbox for *Activate Item*. Choose **System-Guided** as Foreground/Backgrnd Processing. Finally choose **1** (include picking quantities in delivery) for Adopt Pick Quantity.

SD00 Your Delivery Number

Activate Item -checked System-Guided



In the next screen click on Posting to post your transfer order.	
Write down your Transfer Order Number you will need it in the next step.	Transfer order number
Click on the home icon to go to the Fiori Launchpad Overview.	



# Step 17: Confirm Transfer Order II

Task Confirm the second Transfer Order.

Time 5 min

**Short Description** In this task, you will confirm the transfer order for your materials.

Name (Position) Zarah Morello (Good Issue Clerk)

To confirm the transfer order, click in the *Quality Management* area in the role *Good Issue Clerk* on the app *Confirm Transfer Order*.

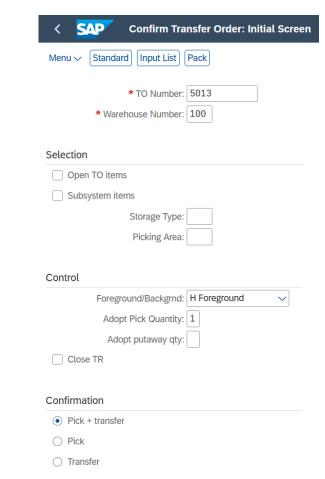
Fiori App

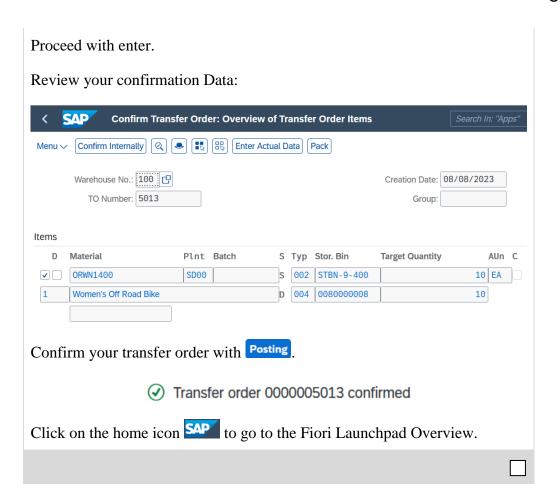


In the *Confirm Transfer Order: Initial Screen*, enter **your TO Number**, which you received in step 15, and the Warehouse Number **100**. Make sure, **Pick** + **Transfer** is checked in the *Confirmation* section.

TO Number 100

Pick + Transfer







# Step 18: Ship Materials

**Task** Ship the ordered materials to your customer.

Time 10 min

**Short Description** In this task, you ship the material to the customer by posting goods issue. Posting goods issue indicates a change in ownership in the goods and reduces the inventory quantities and value in the inventory quantities and value in the San Diego plant

Name (Position) Zarah Morello (Good Issue Clerk)

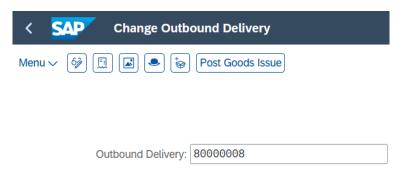
To confirm the transfer order, click in the *Quality Management* area in the role *Good Issue Clerk* on the app *Change Outbound Delivery*.

Fiori App

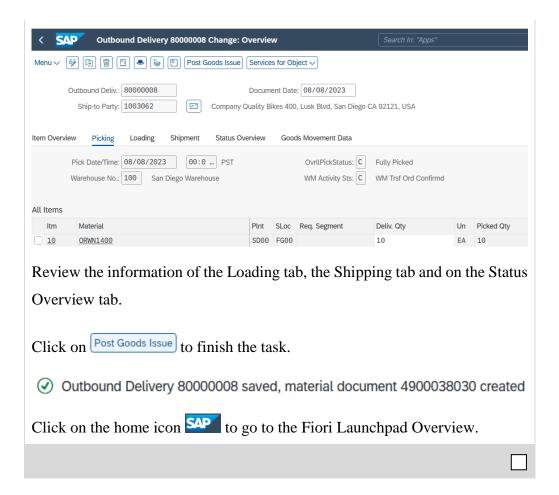


In the screen Change Outbound Delivery use F4 and Enter to enter your **Outbound Delivery** if not automatically filled in. Proceed with enter.

**Outbound Delivery** 



On the *Picking* tab, confirm that the Picked Qty. matches the Deliv. Qty. Also, check the Plant and Storage location fields.





#### Step 19: Create Invoice

Task Create the invoice for your customer.

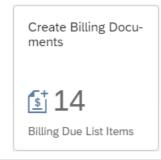
Time 10 min

**Short Description** In this task, you will prepare the invoice that you use to bill a customer.

Name (Position) Stephanie Bernard (AR Accountant)

With the delivery complete, the customer can be invoiced. To create an invoice, click in the *Quality Management* area in the role *AR Accountant* on the app *Create Billing Documents* – *VF01*.

Fiori App

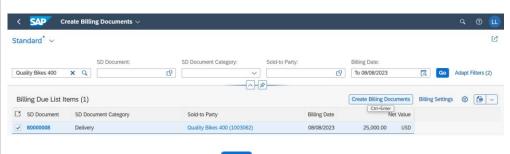


**Note:** The billing document serves several important functions:

- It is the sales and distribution document that helps you to generate invoices.
- The billing document serves as a data source for financial accounting to help you to monitor and process customer payments.
- When you create a billing document, the G/L accounts will normally be updated automatically.

On the *Create Billing Document* screen, enter your business partner **Quality Bikes** ### in the search field and click Go. Select your sales document and then click Create Billing Documents.

Quality Bikes ###



On the following screen click on Save.

You will receive a message, that your Billing document has been saved.

Billing document saved

Click on the home icon to go to the Fiori Launchpad Overview.	



# Step 20: Post Invoice

**Task** Post the invoice you have just created.

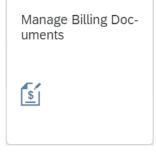
Time 5 min

**Short Description** Use the SAP Fiori Launchpad to post the invoice.

Name (Position) Catherine Dubios (AR Accountant)

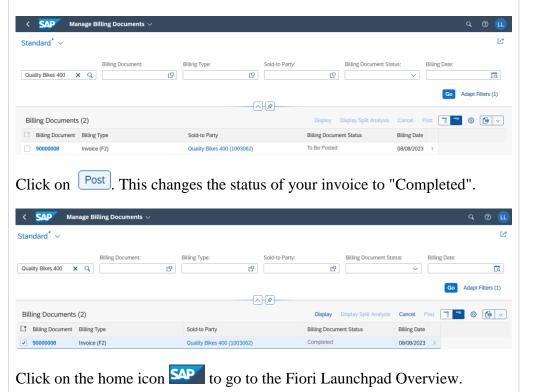
To post your invoice, click in the *Quality Management* area in the role *AR Accountant* on the app *Manage Billing Documents*.

Fiori App



On the *Create Billing Document* screen, enter your business partner **Quality Bikes** ### in the search field and click Go. Select your billing document. Your billing document currently has the status "To Be Posted".

Quality Bikes ###





## Step 21: Receive Payment from Customer

**Task** Receive the Payment for the previously processed order.

Time 10 min

**Short Description** Use the SAP Fiori Launchpad to receive payment from your customer.

Name (Position) Stephanie Bernard (AR Accountant)

To post the incoming payment, click in the *Quality Management* area in the role AR Accountant on the app Post Incoming Payments.

Fiori App



In the screen *Post Incoming Payments* enter the **current date** for the posting date and for Journal Entry Date. Enter US00 for Company Code. Enter the current period as the period and make sure that **DZ** (customer payment) is selected as the Journal Entry Type.

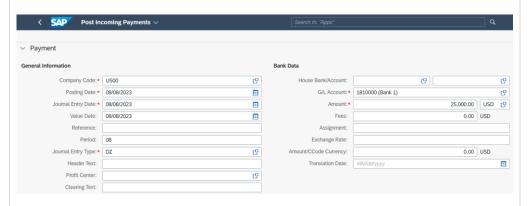
Current date

Current period

USD

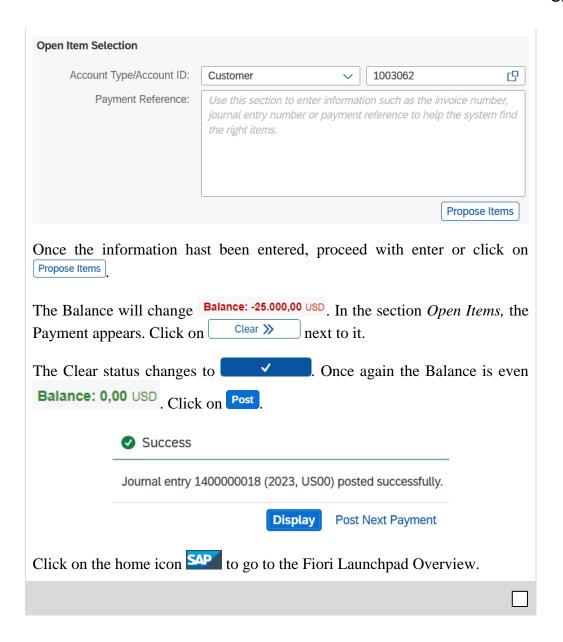
25000 1810000

In the Amount fields enter the amount from the Sales Order to be paid (Net Value = 25000) and USD for Currency/Rate, 1810000 (your bank GL Number) for G/L Account.



Under Open item Selection, choose Customer in the drop down and enter the customer number from the Sales Order in the Account Typ field.

Customer Your customer number





# Step 22: Review Document Flow

Task Review the document flow.

Time 5 min

**Short Description** Use the SAP Fiori Launchpad to review the document flow.

Name (Position) Catherine Dubios (Sales Representative US West)

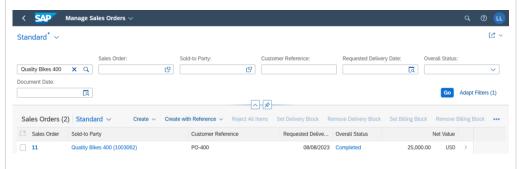
To review the document flow, click in the *Quality Management* area in the role *Sales Representative US West* on the app *Manage Sales Order*.

Fiori App



On the *Manage Sales Orders* screen, enter your business partner **Quality Bikes** ### in the search field and click Go.

Quality Bikes ###



Click on the line of your sales order that is now displayed to you.

In the *Display Standard Order: Overview* screen, click on Document Flow).

This will produce the following screen:

