

SAP BUSINESS TECHNOLOGY PLATFORM | EXTERNAL

End User Guide

Manage Delivery and Billing Block in Sales Order using SAP Build Process Automation or SAP Workflow Management

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01.Overview

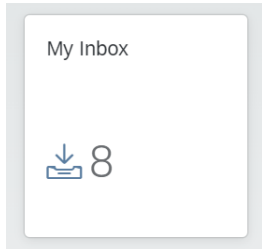
This document provides information about how to use the workflow content package *Manage Delivery and Billing Block in Sales Order* (hereinafter it referred to as “*MDBB*”) using SAP Process Automation or SAP Workflow Management. Below are the main audiences of this document:

- Reviewer – Sales co-ordinator/superuser of the Logistics Department.
- Approver – Includes Head of Department, Sales Manager, Logistics Manager etc.

This content package will enable SAP S/4HANA customers to automate the *Manage Delivery and Billing Block in Sales Order* request process without additional development in SAP S/4HANA system. It provides flexibility in choosing process variants depending on attributes like Sales Organization, Distribution Channel, Division, Customer Group etc. When a user creates / changes a sales order with a Delivery OR Billing Block OR both, a pre-configured process variant is triggered in SAP Process Automation or SAP Workflow Management based on configurable business conditions. After saving, the relevant sales orders are identified with a Delivery/Billing Block OR both and a workflow is triggered. This workflow initiates the approval process for removal of Delivery/Billing Block SAP S/4HANA system, provided the Approval Status is “*Approved*” OR “*Not Relevant*” and the Credit Block status is “*Not Relevant*” OR “*Approved/Released*”.

02. My Inbox Task

“*My Inbox*” application enables line of business users to complete their task. Please go through [SAP My Inbox documentation](#) for more details.



04.Submit/Rework - Reviewer

“Reviewer” can review the Sales Order for any discrepancy such as Prices, Material, Quantity etc. before submitting the same for approval.

All Tasks (93)

- Approve removal of Delivery Block for Sales Order 109
sb-clone-e0215e22... Medium
Due on Mar 3, 2022 Overdue
- Review for removal of Delivery Block for Sales Order 143
sb-clone-e0215e22... Medium
- Error in removal of Delivery Block in sales order 133
sb-clone-e0215e22... Medium
- Review for removal of Billing Block for Sales Order 133
sb-clone-e0215e22... Medium
- Review for removal of Billing Block for Sales Order 139
sb-clone-e0215e22... Medium
- Review for removal of Billing Block for Sales Order 144
sb-clone-e0215e22... Medium
- Review for removal of Delivery Block for Sales Order 137
sb-clone-e0215e22... Medium
- Review for removal of Billing Block for Sales Order 148
sb-clone-e0215e22... Medium
- Review for removal of Billing Block for Sales Order 142
sb-clone-e0215e22... Medium
- Review for removal of Billing Block for Sales Order 137
sb-clone-e0215e22... Medium
- Review for removal of Delivery Block for Sales Order 149
sb-clone-e0215e22... Medium
- Review for removal of Delivery Block for Sales Order 144
sb-clone-e0215e22... Medium
- Review for removal of Billing Block for Sales Order 135
sb-clone-e0215e22... Medium

Review for Removal of Delivery and Billing Block

General Information Items History Comments

Basic Data

Order: 143

Sold To Party: 17100007 (Domestic US Subcontractor A)

Ship To Party: 17100007 (Domestic US Subcontractor A)

City Country or Region: USA

Customer Reference: PO DELV BLK

Requested Delivery Date: 24 Feb,2022

Document Date: 24 Feb,2022

Net Value: 1050.00 USD

Sales Data

Order Reason: 102 (Damaged in Transit)

Approval Status:

Approval Reason:

Overall Blocked Status: Blocked

Sales Organization: 1710 (Dom. Sales Org US)

Distribution Channel: 10 (Direct Sales)

Division: 00 (Product Division 00)

Administrative Data

Created By: [User]

Created On: 24 Feb,2022

Last Changed By:

Last Changed On: 02 Mar,2022

Item	Material	Material Description	Order Quantity	Net Value
10	31	TEST MATERIAL	1.000 KG	1050.00 USD

History

Approver	Role	Decision	Comment	Date
No data				

Comments

Reviewer Comments: *

Submit
Rework
Show Log
Claim

The “Reviewer” can click on either the “Submit” OR “Rework” button to either send it for approval OR end the task.

If the “Reviewer” clicks on the “Submit” button two separate tasks- one for Delivery and one for Billing block are created.

This Task UI has the following sections

1. **General Information**- This section contains the following sections :
 - Basic Data- This section contains information like Sales Order No. Sold-To-Party, Ship-To-Party, Net Value etc.
 - Administrative Data-User information like user responsible for creating /changing the Sales Order and dates on which the Sales Order was created OR changed.
 - Sales Data- Information pertaining to Sales Area and Approval Reason and Status etc. are displayed.
2. **Items** - Sales Order items like material description, quantity, UOM etc. are displayed.
3. **History** – Information pertaining to “Approver”, Role etc. are displayed.
4. **Comments** - Mandatory section in which the “Reviewer” must enter the comments prior to clicking on the “Submit” OR “Rework” button.

05. Approve/ Reject-Approvers

The approver/s can either “Approve” OR “Reject” the request for removal of the blocks in the Sales Order.

The screenshot shows a software interface for task management and approval. On the left, a sidebar titled 'All Tasks (93)' contains a search bar and a list of tasks. The first task is 'Approve removal of Delivery Block for Sales Order 109', which is marked as 'Overdue' and 'Medium'. Other tasks include 'Review for removal of Delivery Block for Sales Order 143', 'Error in removal of Delivery Block in sales order 133', and several others related to Billing and Delivery blocks for various sales orders.

The main pane on the right is titled 'Approval for removal of Delivery / Billing block' and contains several sections:

- General Information:** Includes tabs for 'General Information', 'Items', 'History', and 'Comments'.
- Basic Data:** Contains fields for Order (109), Sold To Party (17100006), Ship To Party (17100006), City Country or Region (USA), Customer Reference (Event test 54), Requested Delivery Date (18 Feb, 2022), Document Date (18 Feb, 2022), and Net Value (330.00 USD).
- Sales Data:** Contains fields for Order Reason, Approval Status, Approval Reason, Overall Blocked Status (Blocked), Sales Organization (1710 (Dom. Sales Org US)), Distribution Channel (10 (Direct Sales)), and Division (00 (Product Division 00)).
- Administrative Data:** Lists users like 'Sriram Rangasamy' and 'Saurav A Mallick' with their creation and last checked dates.
- Items:** A table with columns: Item, Material, Material Description, Order Quantity, and Net Value. It shows one item: Item 10, Material 31, TEST MATERIAL, 3.000 KG, 330.00 USD.
- History:** A table with columns: Approver, Role, Decision, Comment, and Date. It shows a sequence of actions: 'SALES TEAM USER ASSIGNED' (Fri Feb 25 2022 07:43:23), 'ASSIGN REVIEWER' (Fri Feb 25 2022 07:56:03), 'SUBMITTED' (Fri Feb 25 2022 13:30:53), and 'LEVEL-II APPROVER ASSIGNED' (Thu Mar 03 2022 14:36:27).
- Comments:** A section for 'Approver Comments' with a text input area.

At the bottom right of the main pane, there are buttons for 'Approve', 'Reject', 'Show Log', and 'Claim'.

The approval user interface to approve the removal of Delivery/Billing block has the following sections.

1. **General Information-** This section contains information under the following categories:
 - **Basic Data-** Contains information pertaining to sales order like sales order no. Sold-To-Party, Ship-To-Party, amount etc.
 - **Sales Data –** This contains the sales area, Approval Status etc.

- **Administrative Data-** Information regarding user responsible for create / change and creation/ change date is mentioned.
2. **Items** – Details of sales order item details e.g., Material, description, quantity, and net value.
 3. **History** to view the record of the Previous Level reviewer/approver comments, role etc.
 4. **Comments-** Mandatory field to be filled when the time of Approve or Rejection task.

06. Admin Task

If a task owner is not determined, the admin will get the Process Admin UI.

The task UI has the following sections:

1. **Error Description** – Displays the message because of which the task is forwarded to the Admin.
2. **Task Owner Assignment** – User-ID, Group ID, Email assignment done by the Admin. After entering the relevant information and “*Comments*” the admin will click on “*Assign Approver*” to trigger mail notification and send the task to the “*My Inbox*” app.
3. **History** - to view the record of the Previous Level approver comments, if any.
4. **Comments** – Admin comments are entered here.
5. **Header Data**- Information like sales order number, sales area information, net value etc. are displayed here.

All Tasks (93)

Task Owner is not defined for removal of Delivery Block from...

sb-clone-e0215e22-... Medium

Task Owner is not defined for removal of Billing Block from...

sb-clone-e0215e22-... Medium

Task Owner is not defined for removal of Billing Block from...

sb-clone-e0215e22-... Medium

Task Owner is not defined for removal of Delivery Block from...

sb-clone-e0215e22-... Medium

Task Owner is not defined for removal of Delivery Block from...

sb-clone-e0215e22-... Medium

Task Owner is not defined for removal of Delivery Block from...

sb-clone-e0215e22-... Medium

Task Owner is not defined for removal of Billing Block from...

sb-clone-e0215e22-... Medium

Task Owner is not defined for removal of Delivery Block from...

sb-clone-e0215e22-... Medium

Task Owner is not defined for removal of Billing Block from...

sb-clone-e0215e22-... Medium

Task Owner is not defined for removal of Delivery Block from...

sb-clone-e0215e22-... Medium

Task Owner is not defined for removal of Delivery Block for...

sb-clone-e0215e22-... Medium

Task Owner is not Defined for Removal of Billing Block From...

shamsudheen.k@it... Medium

IT Support Sales User Assignment

Task Owner is not defined for removal of Delivery Block from Sales Order 71

Created On: Feb 25, 2022
 Created By: sb-clone-e0215e22-b660-480f-b102-116959a0eb7b1b95519\work\flow\wb10150 Priority: Medium

Error Description | Task Owner Assignment | History | Comments | Header Data

Error Description: Email ID of Sales Team User is not defined for removal of Delivery Block in sales order 71

Task Owner Assignment

Users:

Groups:

Email:

History

User	Role	Action	Comment	Date
No items available.				

Comments

Comment:

Header Data

Sales Order:

Customer Number:

Customer Name:

Sales Organisation:

Sales Organisation Name:

Division:

Division Name:

Sales Office:

Sales Office Name:

Sales Group:

Sales Group Name:

Net Value:

Currency:

Tasks and mail notification will be received by the Process Admin in case of the following:

- *Sales Team user* not determined
- *Reviewer* not determined
- *Approver* not determined

07.Process Visibility Workspace

Process Visibility enable Process Owners and Process Operators to gain real time visibility on processes and key process performance indicators. Process visibility capability enables customers to gain out of the box visibility into their deployed processes. Please refer [help documentation](#) for more details.

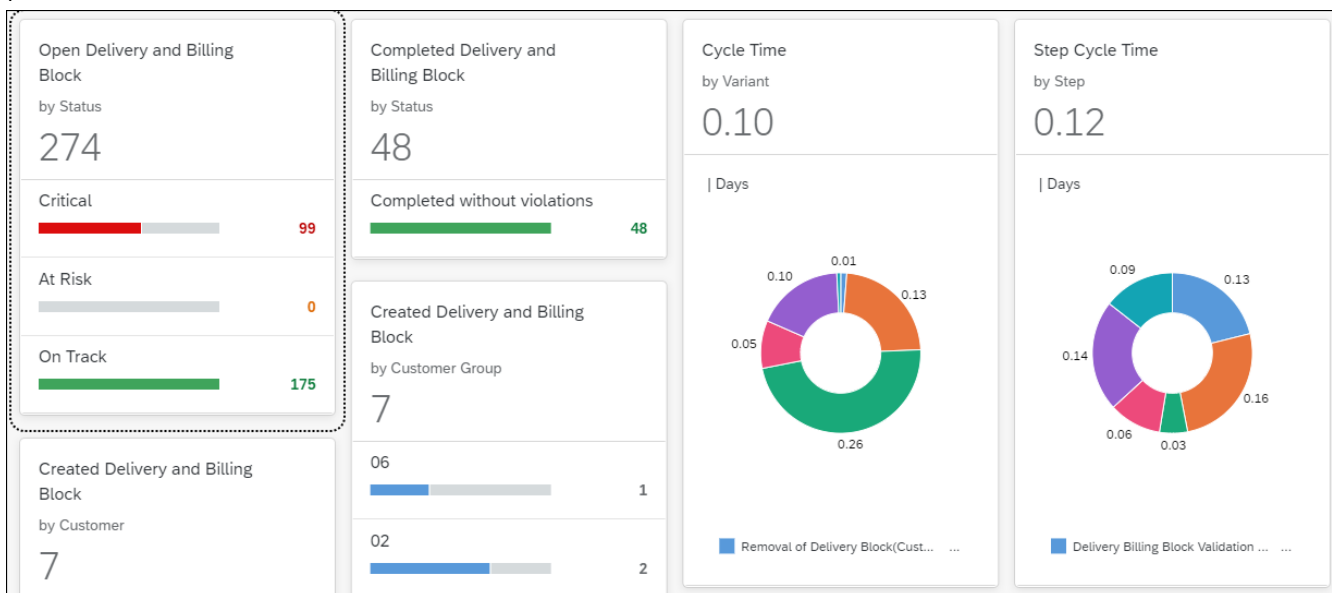
The **Manage Delivery and Billing Block in Sales Order** content package provides such out of the box visibility and process performance indicators for all the active process variants in SAP Process Automation or SAP Workflow Management. A process owner or line of business expert can enhance the visibility scenario.

Access Process Workspace with SAP Process Automation

1. The administrator would have added a tile in the central Fiori Launchpad that corresponds to the scenario "Manage Delivery and Billing Block in Sales Order". For more information on how to add scenario-specific tiles, refer to the [help documentation](#).
2. Click the scenario-specific tile in the Fiori Launchpad.
3. User will see the below detailed process visibility dashboard.

Access Process Workspace with SAP Workflow Management

1. Go to *Process Flexibility Cockpit*
2. Select *Manage Delivery and Billing Block in Sales Order*
3. Click *Live Process Insights Manage Delivery and Billing Block in Sales Order*
4. User will see the below detailed process visibility dashboard.



Please go through the [help documentation](#) how to access process workspace.