

SAP BUSINESS TECHNOLOGY PLATFORM | EXTERNAL

End User Guide

Manage Sales Order Approvals using SAP Build Process Automation or SAP Workflow Management

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Overview

This document provides information about how to use the user interfaces of Manage Sales Order Approval Process. Approvers, Requestors and Process Operators are the target users of the user interfaces explained in this document.

Manage Sales Order Approval Process content package for SAP S/4HANA enables to automate sales order creation in a flexible and transparent way. It provides flexibility in executing a specific variant of the process depending on attributes like net amount and transaction currency etc. When a user submits a request to create a new sales order in SAP S/4HANA system, a pre-configured process variant is triggered in SAP Build Process Automation or SAP Workflow Management based on configurable business conditions. On approval, a sales order is released in SAP S/4HANA system.

Salient features of this content package are mentioned below:

- Plug and Play with SAP S/4HANA without any additional development
- Process steps delivered to approve a sales order
- Automatic email notification to parties involved
- Business Rules provides flexibility in determining approvers strategy i.e., to have approval from external system or Business Rules and determining approvers
- Business Rules for Business Validation of Sales Order to cater to specific business requirements and validations
- New variant of the process can be created using the pre-delivered process steps in a no-code / low-code approach
- Out-of-the-box visibility into key process performance indicators

Pre-requisites

1. Sales Order must be created in SAP S/4HANA or SAP S/4HANA Cloud
2. Sales Order lifecycle events are pushed from SAP S/4HANA or SAP S/4HANA Cloud to Business Technology Platform through the Event Mesh configuration
3. SAP Integration Suite to push Sales Order lifecycle events on to SAP Workflow Management.

Manage Sales Order Approvals

The Manage Sales Order Approvals workflow content enables the business user to view the Sales Orders which are configured for external approvals and make a decision to Approve or Reject the Sales Order which in turn will Release or Reject it in SAP S/4HANA or SAP S/4HANA Cloud

Approve/Reject Sales Order

Once a sales order that requires 'External Approval' is created in SAP S/4HANA system, based on the business configuration (such as net value of the Sales Order), a process variant will be triggered and users will receive tasks in My Inbox application.

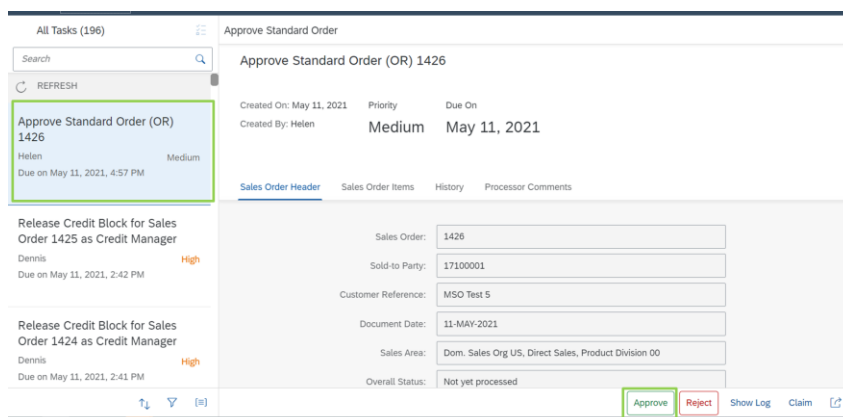
My Inbox Tasks

The My Inbox application enables line of business users to claim and complete their task. Please check the [documentation for My Inbox](#) for more details.

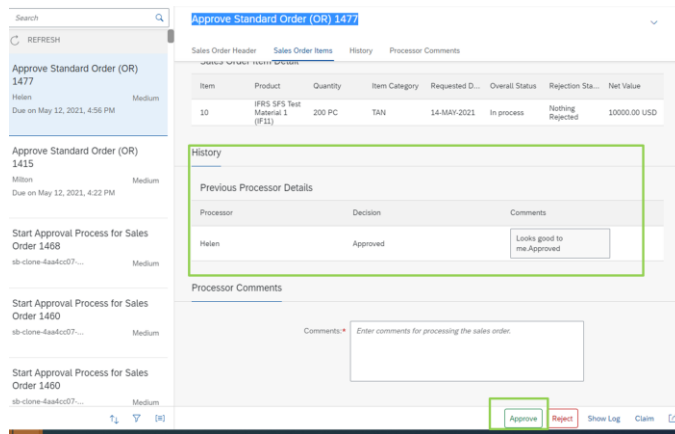
The recipient is determined by a business rule. The task can either be approved or rejected.

The Approval User Interface has four sections.

1. Sales Order Header – Header details of Sales Order
2. Sales Order Items – Item level details of Sales Order
3. History – Record of the previous approvals, if any.
4. Comments - Comments from Approvers



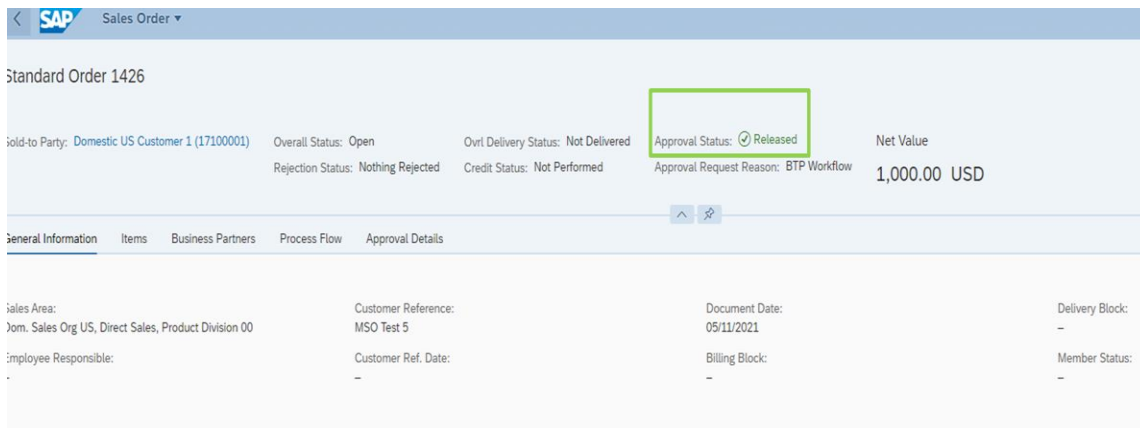
A Comment must mandatorily be provided before approving or rejecting the.



The next step is triggered based on how the process variant is configured by the Process Expert.

Approval

When a Sales Order is approved, it is released for further processing in the S/4HANA system. The approval status will show 'Released' as the status of the Sales Order



Rejection

If rejected, then the Sales Order Approval Status is updated as **Rejected** in S4HANA system

Standard Order 1398

Customer: Domestic US Customer 1 (17100001) Overall Status: Completed Overall Delivery Status: Completed **Approval Status: Rejected** Net Value: 0.00 USD
 Rejection Status: Everything Rejected Credit Status: Not Performed Approval Request Reason: BTP Workflow

[General Information](#) [Items](#) [Business Partners](#) [Process Flow](#) [Approval Details](#)

Sales Area: Sales Org US, Direct Sales, Product Division 00 Customer Reference: MSO test 3 Document Date: 05/10/2021 Delivery Block: -
 Sales Representative: - Customer Ref. Date: - Billing Block: - Member Status: -

MS

Item	Product	Requested Quantity	Item Category	Requested Delivery Date	Overall Status	Rejection Status	Net Value
1	IFRS SFS Test Material 1 (F11)	500	PC Standard Item (TAN)	05/14/2021	Completed	Fully Rejected	25,000.00 USD

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.

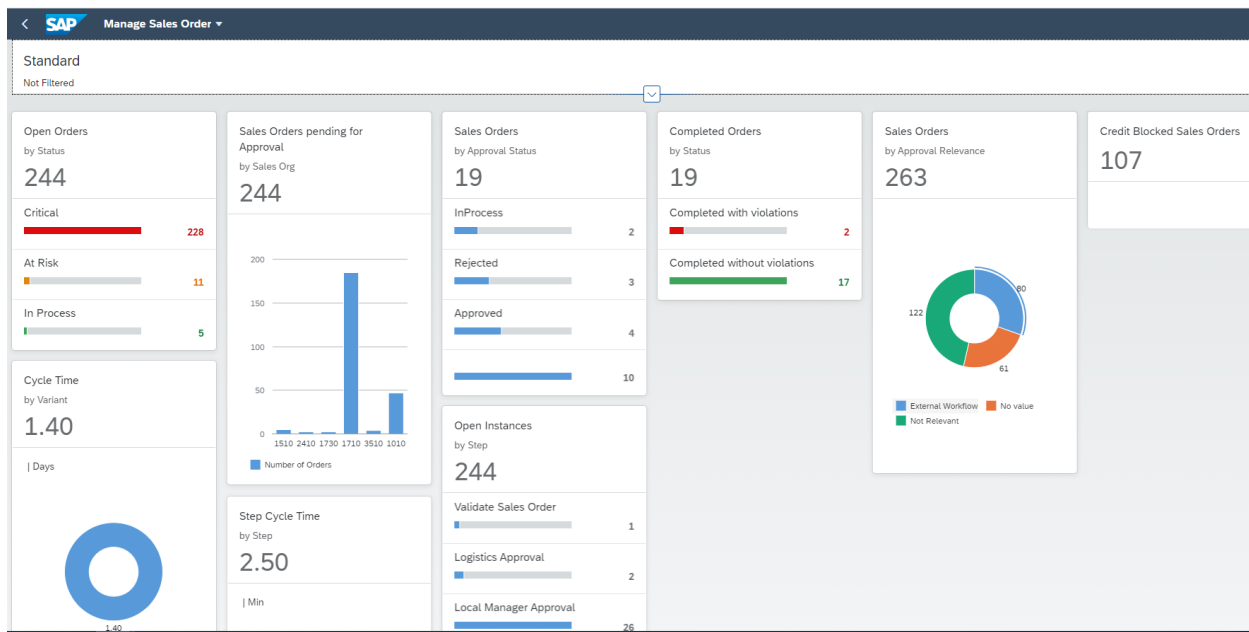
The “Manage Sales Order” content package provides such out of the box visibility and process performance indicators for all the active process variants in SAP Build Process Automation or SAP Workflow Management. A process owner or line of business expert can enhance the visibility scenario.

Access Process Workspace with SAP Build Process Automation

1. The administrator would have added a tile in the central Fiori Launchpad that corresponds to the scenario “Manage Sales Order Approval Process”. 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 Sales Order Approvals
3. Click Live Process Insights – Manage Sales Order Approvals

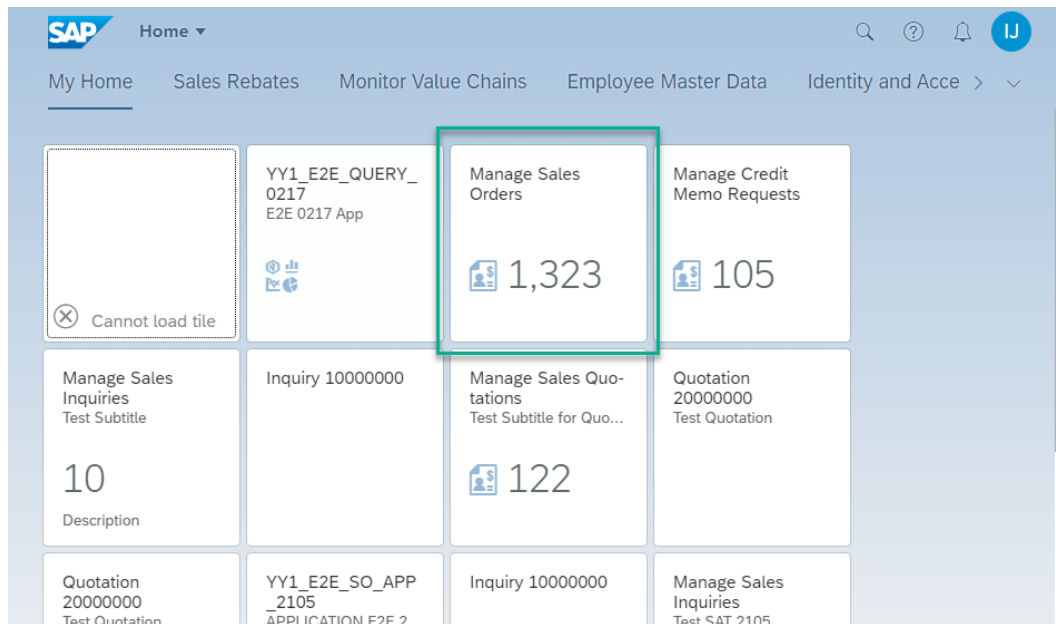


Please go through [help documentation](#) to know about process workspace.

Appendix

Sales Order Creation

A sales order can be created in the Manage Sales Orders application in the SAP S4HANA Fiori launchpad.



The sample data to create a sales order in S4HANA is mentioned below.

Header Label Details

Property	Value	Comment
Sales Order Type	OR	
Sales Organization	1710	
Distribution Channel	10	
Division	00	
sold to party	17100001	
Order Reason	BTP	

Item Label Details:

Property	Value	Comment
Product	IF11	

Requested quantity	20 PC	
Item Category	TAN	

Email Notification

When the sales order is sent for approval, an email notification is sent to the recipients, provided that the correct email ids are maintained in the 'Determine Approvers' policy.

Delete
Respond
Sensitivity
Quick Steps

Approve Standard Order (OR) 1417

M

[Redacted]

To: [Redacted]

The following sales order needs to be approved. Kindly respond in "My Inbox" application.

Sales Order Details	
Sales Order	1417
Sold To Party	17100006
Customer Reference	ASO-CB-Flow 'B B-A B'
Document Date	11-MAY-2021
Sales Area	Dom. Sales Org US, Direct Sales, Product Division 00
Overall Status	Partially processed
Net Values	552963.31 USD
Sales Order Type	Standard Order (OR)
Sales Organization	Dom. Sales Org US (1710)
Distribution Channel	Direct Sales (10)
Division	Product Division 00 (00)
Approval Reason	ZBTP

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