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| --- | --- |
|  |  |
| Master Data Script  SAP S/4HANA - 18-09-20 | public |
| Create Product Substitution (4VO) |

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# Purpose

In this document you will find how to create a Product Substitution and Exclusion master data for your SAP S/4HANA Cloud system.

Product Substitution is a technique used to replace one product with another product. A Product Substitution can be created for various reasons. For example:

* Product is no longer in stock
* Product is out of warranty
* Substitute Product is abundant in stock

Product Exclusion enables the customers to exclude a product from being a substitue. For example, Exclusion can be created for a discontinued product.

# Prerequisites

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

## System Access

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

## Roles

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name (Role) | ID (Role) | Description (Space) | ID (Space) | Log On |
| Master Data Specialist - Product Data | SAP\_BR\_PRODMASTER\_SPECIALIST | Product | SAP\_BR\_PRODMASTER\_SPECIALIST |  |

## Required Organizational Units

The organizational structure reflects the structure of your company. Product Substitutes can be dependent on the organizational units (plant) of the company. It can also be independent of the organizational unit. The following table gives an overview of the relevant organizational units.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Data Segment | Depends On | Field Examples | Comments | Organizational Unit to be Used |
| Product Substitution and Product Exclusion | Plant |  | Plant is not mandatory in product substitution/exclusion. Product substation/exclusion can happen without plant restriction. | Plant:  \_\_\_\_\_\_\_\_\_\_\_\_ |

## Mandatory Master Data

Product Substitution data refers to product master data. The mandatory master data for the test script represents Materials/Products. Create your own master data by following the sample master data provided below.

|  |  |  |  |
| --- | --- | --- | --- |
| Master Data Object | Used in Data Segment | Mandatory/Optional | Comments |
| Material | Create Product Substitution  Create Product Exclusion | Mandatory | To create product substitution or product exclusion, there should be at least 2 material/products master data in your system |

For more information on creating master data objects, see [Master Data Scripts (MDS)](https://support.sap.com/content/dam/SAAP/Sol_Pack/BP_OP_ENTPR/BP_OP_ENTPR_S4HANA2020_7_Master_Data_EN_XX.htm) .

Table 1: Master Data Script Reference

|  |  |
| --- | --- |
| MDS | Description |
| BNF | Create Product Master of Type "Trading Good" |

## Preliminary Steps

### Create Reason for Substitution (Optional)

Test Administration

Customer project: Fill in the project-specific parts.

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

Purpose

The following procedure provides instructions for creating reason for product substitution/exclusion. Apps available to you are dependent upon your assigned role.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as a Master Data Specialist - Product Data. | The SAP Fiori launchpad appears. |  |
| 2 | Access the SAP Fiori App | Open Manage Substitution Reasons - Products (F4789). | The Manage Substitution Reasons - Products screen is displayed. |  |
| 3 | Choose Create | On the Manage Substitution Reasons – Products screen, choose Create. | The Manage Substitutions Reasons-Products Create screen is displayed. |  |
| 4 | Enter Reason | In the Header section, make the following entry.  Reason: <Enter the new Reason code for substitution, for example, Upgrade> |  |  |
| 5 | Save Your Data | Choose Save. | System message shows that object is saved. |  |
| 6 | Choose Create | In the Description section, choose Create. | The Reason Description Create screen is displayed. |  |
| 7 | Enter Description Data | In the Description section, make the following entries:  Language Key: <Enter Language applicable for rea-son, for example, EN English>  Reason Description: <Enter text to describe the reason, for example, Applicable for Products undergoing upgrades> |  |  |
| 8 | Save Your Data | Choose Save. | System message shows that object is saved. |  |

### Create Group for Substitution (Optional)

Test Administration

Customer project: Fill in the project-specific parts.

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

Purpose

The following procedure provides instructions for creating Group for Product Substitution/Exclusion. Apps available to you are dependent upon your assigned role.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as a Master Data Specialist - Product Data. | The SAP Fiori launchpad appears. |  |
| 2 | Access the SAP Fiori App | Open Manage Substitution Groups - Products (F4788). | The Manage Substitution Groups - Products screen is displayed. |  |
| 3 | Choose Create | On the Manage Substitution Groups – Products screen, choose Create. | The Manage Substitutions Groups-Products Create screen is displayed. |  |
| 4 | Enter Group | In the Header section, make the following entry:  Group: <Enter the new Group for substitution, for example, STANDARD\_DISPLAY> |  |  |
| 5 | Save Your Data | Choose Save. | System message shows that object is saved. |  |
| 6 | Choose Create | In the Description section, choose Create. | The Group Description Create screen is displayed. |  |
| 7 | Enter Description Data | In the Description section, make the following entries:  Language Key: <Enter Language applicable for Group, for example, EN English>  Group Description: <Enter text to describe the group, for example, All standard computer display> |  |  |
| 8 | Save Your Data | Choose Save. | System message shows that object is saved. |  |
| 9 | Choose Back | In the Title section, Choose < (Back) | The Manage Substitutions Groups-Products screen is displayed. |  |
| 10 | Activate Group Data | Choose Set to Active. | System message shows that object is active. |  |

### Create Control for Substitution (Optional)

Test Administration

Customer project: Fill in the project-specific parts.

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

Purpose

The following procedure provides instructions for creating control for product substitution/exclusion groups. Apps available to you are dependent upon your assigned role.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as a Master Data Specialist - Product Data. | The SAP Fiori launchpad appears. |  |
| 2 | Access the SAP Fiori App | Open Manage Substitution Controls - Products (F4787). | The Manage Substitution Controls - Products screen is displayed. |  |
| 3 | Choose Create | On the Manage Substitution Controls – Products screen, choose Create. | The Manage Substitution Controls-Products Create screen is displayed. |  |
| 4 | Enter Control | In the Header section, make the following entry.  Control: <Enter the new control for substitution, for example, SALE> |  |  |
| 5 | Save Your Data | Choose Save. | System message shows that object is saved. |  |
| 6 | Choose Create | In the Description section, choose Create. | The Control Description Create screen is displayed. |  |
| 7 | Enter Description Data | In the Description section, make the following entries:  Language Key: <Enter Language applicable for Control, for example, EN English>  Control Description: <Enter text to describe the Control, for example, For Sale> |  |  |
| 8 | Save Your Data | Choose Save. | System message shows that object is saved. |  |
| 9 | Choose Back | In the Title section, Choose < (Back). | The Manage Substitution Controls-Products screen is displayed. |  |
| 10 | Assign Groups | In the Assigned Groups section, Choose Assign. | The Assign Groups to Control dialog is displayed. |  |
| 11 | Choose Group | In the Assign Groups to Control dialog, search and choose Group.  For example, choose Group <STANDARD\_DISPLAY>  Choose OK. | System message shows that object is assigned. |  |

# Overview Table

This scope item consist of the process segments provided in the below table.

If your system administrator has enabled spaces and pages on the SAP Fiori launchpad, the homepage will only contain the essential apps for performing the typical tasks of a business role.

You can find all other apps not included on the homepage using the search bar.

If you want to personalize the homepage and include the hidden apps, navigate to your user profile and choose Settings > App Finder .

|  |  |  |  |
| --- | --- | --- | --- |
| Segment | Business Role | App/Transaction | Expected Results |
| [Create Product Substitution](#unique_11) [page ] 11 | Master Data Specialist - Product Data | Manage Substitutions - Products (F4785) | Product Substitution record is created. |
| [Create Product Exclusion](#unique_12) [page ] 13 | Master Data Specialist - Product Data | Manage Exclusions - Products (F4786) | Product Exclusion record is created. |

# Test Procedures

This section describes test procedures for each process step that belongs to this scope item.

## Create Product Substitution

Test Administration

Customer project: Fill in the project-specific parts.

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

Purpose

The following procedure provides instructions for creating Product Substitution. Apps available to you are dependent upon your assigned role.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as a Master Data Specialist - Product Data. | The SAP Fiori launchpad appears. |  |
| 2 | Access the SAP Fiori App | Open Manage Substitutions - Products (F4785). | The Manage Substitutions - Products screen is displayed. |  |
| 3 | Choose Create | In the Manage Substitutions - Products view, choose Create. | The Manage Substitutions -Products flexible column layout with create screen is displayed. |  |
| 4 | Enter Header Data | In the Header section, make the following entries:   * Product: <Enter the product which requires a substitute> * Substitute Product: <Enter the substitute> * Plant: <Plant number> * ATP Product: <preselected as default value>   Product and Substitute Product data is mandatory to create a substitution. |  |  |
| 5 | Enter General Information Data | In the General Information section, make the following entries:   * Reason: <Enter the reason for creating substitute. Example Upgrade> * Valid From Date: <Enter the start date for validity> * Valid From Time: <Enter the start time for validity> * Valid To Date: <Enter the end date for validity> * Valid To Time: <Enter the end time for validity> * Time Zone: <Enter the TimeZone applicable for validity>   The above entries are optional. |  |  |
| 6 | Save Your Data | Choose Save. | System message shows that object is saved. |  |
| 7 | Activate Product Substitution Data | Choose Set to Active. | System message shows that object is active. |  |

## Create Product Exclusion

Test Administration

Customer project: Fill in the project-specific parts.

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

Purpose

The following procedure provides instructions for creating Product Exclusion. Apps available to you are dependent upon your assigned role.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as a Master Data Specialist - Product Data. | The SAP Fiori launchpad appears. |  |
| 2 | Access the SAP Fiori App | Open Manage Exclusions - Products (F4786). | The Manage Exclusions - Products screen is displayed. |  |
| 3 | Choose Create | In the Manage Exclusions - Products view, choose Create. | The Manage Exclusions -Products Create screen is displayed. |  |
| 4 | Enter Header Data | In the Header section, make the following entries:   * Product: <Enter the product which needs to be excluded from Substitution> * Plant: <Plant number> * ATP Product: <preselected as default value>   Product is mandatory to create an exclusion. |  |  |
| 5 | Enter General Information Data | In the General Information section, make the following entries:   * Reason: <Enter the reason for excluding the Product> * Valid From Date: <Enter the start date for validity> * Valid From Time: <Enter the start time for validity> * Valid To Date: <Enter the end date for validity> * Valid To Time: <Enter the end time for validity> * Time Zone: <Enter the TimeZone applicable for validity>   The above entries are optional. |  |  |
| 6 | Save Your Data | Choose Save. | System message shows that object is saved. |  |
| 7 | Activate Product Exclusion Data | Choose Set to Active. | System message shows that object is active. |  |

Typographic Conventions

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

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