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| Test ScriptSAP S/4HANA - 18-09-20 | public |
| Planning Apps for Sales (1O0) |

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# Purpose

For sales and distribution scenarios, this scope item provides key information needed for a sales manager regarding the creation and maintenance of Sales planning Apps, effectively handling the different stages in sales planning. The Sales Manager can also select some existing sales plans to compare with actual data. In addition to this, there is also a possibility to navigate to the corresponding app to further analyze.

This document provides a detailed procedure for testing this scope item after solution activation, reflecting the predefined scope of the solution. Each process step, report, or item is covered in its own section, providing the system interactions (test steps) in a table view. Steps that are not in scope of the process but are needed for testing are marked accordingly. Project-specific steps must be added.

# 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.

## Roles

Assign the following business roles to your individual test users. Alternatively, if available, you can create business roles using the following spaces with pages and predefined apps for the SAP Fiori launchpad and assign the business roles to your individual test users.

Note These roles or spaces are examples provided by SAP. You can use them as templates to create your own roles or spaces.

For more information about business roles, refer to Assigning business roles to a user in the [Administration Guide to Implementation of SAP S/4HANA with SAP Best Practices](https://help.sap.com/viewer/S4HANA2020_AdminGuide) .

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name (Role) | ID (Role) | Description (Space) | ID (Space) | Log On |
| Sales Manager | SAP\_BR\_SALES\_MANAGER | Sales Management | SAP\_BR\_SALES\_MANAGER |  |

## 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. |

## Business Conditions

Follow the procedures described in the following scope items for creating corresponding business data if needed.

|  |  |
| --- | --- |
| Scope item | Business Condition |
| BD9 - Sell from Stock | Follow the scope item to create the corresponding business data. |

# Overview Table

This scope item consists of several process steps provided in the following 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 .

|  |  |  |  |
| --- | --- | --- | --- |
| Process Step | Business Role | Transaction/App | Expected Results |
| [Manage Sales Plans](#unique_7) [page ] 5 | Sales Manager | Manage Sales Plans (F2512) | The SAP Fiori app is running correctly. |
| [Sales Performance - Plan/Actual](#unique_8) [page ] 7 | Sales Manager | Sales Performance - Plan/Actual (F2941) | The SAP Fiori app is running correctly. |

# Test Procedures

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

## Manage Sales Plans

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

With the Manage Sales Plans app, you as a sales manager can

* create a sales plan
* edit a sales plan
* copy the sales plan to new version
* release the sales plan version
* search the sales plan in the list page

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log On | Log on to the SAP Fiori launchpad as a Sales Manager. | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open Manage Sales Plans (F2512) in the Sales Planning business group. | The app is displayed. |  |
| 3 | Get Search Results | Enter some search criteria in the filter bar or leave them empty. Choose Go. | The search result of sales plans is displayed. |  |
| 4 | Create a Sales Plan | Choose Create Sales Plan. Go to the Sales Plan screen.* In the General Information section, enter and select data for the following attributes.

Sales Plan: Enter the plan name.Plan description: Enter the plan description.Currency: Enter or select the plan currency.Planned For: Select Incoming Sales Orders or Sales Volume for the plan.Planned By: select Month, Quarter, or Year for the plan.Planned From: select the start date of the plan.Planned To: Select the end date of the plan.Version: Enter the plan version name.Version Description: Enter the plan version description.* In the Dimensions section, choose Add. On the Select Dimensions screen, select the planning dimensions, then choose OK.
* In the Plan Data section, choose Download to download the planning excel. Maintain the planning data in the excel file. Choose Upload to upload the excel file to the system.

After uploading the plan data into system, choose Chart View or Table View to view the data in different format. Chart type can also be customized. Choose Filter to check more detailed plan, for example, filter value for certain Sales Organization.* Choose Save to save the sales plan.
 | A sales plan is created. |  |
| 5 | Edit the Sales Plan | On the Sales Plan screen, choose Edit. In the edit mode, make the necessary changes and then choose Save to save the changes. | The sales plan is changed. |  |
| 6 | Copy the Sales Plan to a New Version | On the Sales Plan screen, choose Copy to New Version, change the new version and choose Save. | The sales plan is copied to a new version. |  |
| 7 | Release the Sales Plan Version | On the Sales Plan screen, choose Release to release the planning version. | The sales plan version is released. |  |

## Sales Performance - Plan/Actual

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

With this app, you as a sales manager can compare the plan data in the sales plan with the actual sales data. The comparisons gain insights into sales performance and effectiveness of sales planning. Additionally, you can do further actions using easy navigation.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log On | Log on to the SAP Fiori launchpad as a Sales Manager. | The SAP Fiori launchpad is displayed. |  |
| 2 | Set User Default Values | Choose the user icon and select Settings. On the Settings screen, choose Default Values. Maintain values for your user. For example, Exchange Rate Type, Display Currency. Choose Save. | The user default values are set. |  |
| 3 | Access the App | Open Sales Performance - Plan/Actual (F2941) in the Sales Planning business group. | The app opens. |  |
| 4 | Select Sales Plan and Version | Choose the icon on the right side of the Sales Plan input box. On the Select: Sales Plan screen, enter the information needed, then choose Go. In the result list, select one sales plan, and choose Go. | The plan and actual data are displayed in the app. |  |
| 5 | Select More Dimension | Choose View By in the chart to select More Dimension, which is available in the sales plan for analysis. For example, choose Sales Organization. | The Plan/Actual data is adjusted accordingly. |  |
| 6 | Navigate to Target Apps | Choose Actions in the chart and choose the smart link for navigating to the target apps for further analysis. For example, choose Show Quotation Conversion Rates. | The target apps open successfully. |  |
| 7 | View Management | Navigate back to the Sales Performance - Plan/Actual app, apply some filters in the filter bar, and choose the Select View icon. On the My Views screen, choose Save As. On the Save View screen, enter the view name and select the necessary checkbox, and then choose OK. You can also manage the view by choosing Manage on the My Views screen. | The views can be managed for the app. |  |

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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