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| --- | --- |
|  |  |
| Test Script  SAP S/4HANA - 25-08-20 | public |
| Sale of Services (2EQ\_DE) |

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# Purpose

A service product is used in the sales order. It allows the sales of services without delivery and direct (order-related) billing.

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.

## 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

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 |
| Internal Sales Representative | SAP\_BR\_INTERNAL\_SALES\_REP | Internal Sales | SAP\_BR\_INTERNAL\_SALES\_REP |  |
| Billing Clerk | SAP\_BR\_BILLING\_CLERK | Billing | SAP\_BR\_BILLING\_CLERK |  |
| Credit Controller | SAP\_BR\_CREDIT\_CONTROLLER | Credit Management | SAP\_BR\_CREDIT\_CONTROLLER |  |
| Order Fulfillment Specialist | SAP\_BR\_ORDER\_FULFILLMNT\_SPCLST | Order Fulfillment Execution | SAP\_BR\_ORDER\_FULFILLMNT\_SPCLST |  |
| Order Fulfillment Manager | SAP\_BR\_ORDER\_FULFILLMNT\_MNGR | Order Fulfillment Management | SAP\_BR\_ORDER\_FULFILLMNT\_MNGR |  |

## Master Data, Organizational Data, and Other Data

The organizational structure and master data of your company has been created in your system during activation. The organizational structure reflects the structure of your company. The master data represents materials, customers, and vendors, for example, depending on the operational focus of your company.

Use your own master data or the following sample data to go through the test procedure.

|  |  |  |  |
| --- | --- | --- | --- |
| Master / Org. Data | Value | Master / Org. Data Details | Comments |
| Material | SM0001 | Service Material 01 |  |
| Sold-to party | 10100003 10100005 | Customer domestic 03  Customer domestic 05 | You can test the scope item using another domestic customer.  10100005 is for credit management. |
| Payer | 10100003 10100005 | Customer domestic 03  Customer domestic 05 |  |
| Plant | 1010 | Plant 1 DE |  |
| Storage Location | 101A | Std. storage 1 |  |
| Shipping Point | 1010 | Shipping Point 1010 |  |
| Sales organization | 1010 | Dom. Sales Org |  |
| Distribution channel | 10 | Direct Sales |  |
| Division | 00 | Product Division 00 |  |

For more information about creating master data, see the following [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) Script documentation.

Table 1: Master Data Script Reference

|  |  |
| --- | --- |
| MDS | Description |
| BND | Create Customer Master |
| 31X | Create Product Master of Type "Services" |

## Preliminary Steps

### Create Condition Records (Optional)

Purpose

In case you have finetuned the access sequence of SAP pre-shipped condition types, the relative condition records should be created accordingly.

You can find general information on how to create master data objects in the following [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 2: Master Data Script Reference

|  |  |
| --- | --- |
| Master Data ID | Description |
| BET | Create Sales Pricing Condition |

# Overview Table

This scope item consists of several process steps that are listed 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 | App | Expected Results |
| [Credit Management - Set Credit Limit (Optional)](#unique_8) [page ] 8 | Credit Controller | See scope item no. BD6 | Credit Limit for Customer 10100005 has been set. |
| [Sales Quotation (Optional)](#unique_9) [page ] 9 | Internal Sales Representative | See scope item no. BDG |  |
| [Create Sales Order](#unique_10)  [page ] 10 | Internal Sales Representative | Manage Sales Orders (F1873) |  |
| [Process Sales Order Approval (Optional)](#unique_11) [page ] 12 | | | |
| [Credit Management - Review Blocked Sales Orders (Optional)](#unique_12) [page ] 12 | Credit Controller | See scope item no. BD6 |  |
| [Create Billing Document](#unique_13) [page ] 13 | Billing Clerk | Create Billing Documents (F0798) |  |

# Test Procedures

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

The Enterprise search function provides a central entry point for finding business objects in your company from different sources using a single search request. You can search for objects such as: Apps, fact sheets for business objects. From the data found, you can go directly to the respective apps and fact sheets to display, edit the data or find related objects.

How to access and check a fact sheet:

- Log on to the SAP Fiori Launchpad using the respective user, for example, Internal Sales Representative.

- Access the Enterprise Search Bar and choose the magnifying glass button in the upper right corner.

- The Enterprise Search bar is displayed, two filter fields appear left to the search button. Enter your Search Criteria and choose the business object type, e.g.: Sales orders from dropdown menu in first field, enter sales order number in second field and choose Search. The sales order is listed.

- Choose the sales order number link: the system navigates to the fact sheet screen and sales order related information is integrated and summarized in one Fiori page, You can get detailed data via choosing the corresponding links.

There are fact sheets available for the following objects: (Visible depending on the assigned role)

- Sales order

- Quotation

- Billing document

- Credit Memo

- Debit Memo

- Customer 360 Fact sheet

## Credit Management - Set Credit Limit (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

This process step shows you how to set a credit limit for the used customer.

Procedure

Complete all the activities described in Basic Credit Management (BD6) scope item.

## Sales Quotation (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

This optional process step shows you the process for a standard sales quotation.

Procedure

Complete all the activities described in Sales Quotation (BDG) scope item.

Note If you want to use the optional link between Sales Quotation (BDG) scope item and this one, make sure to use consistent master data, such as Business Partner for customer quotation and for customer sales order.

## Create Sales Order

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. |

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log On | Log on to the SAP Fiori launchpad as an Internal Sales Representative. | The SAP Fiori launchpad displays. |  |
| 2 | Access the App | Open Manage Sales Orders (F1873). | The Manage Sales Orders screen displays. |  |
| 3 | Create Sales Order | On Manage Sales Orders screen, choose Add and select Create Sales Order - VA01. |  |  |
| 4 | Enter Data | On the Create Sales Documents screen, make the following entries:   * Order Type: OR * Sales Organization: 1010 * Distribution Channel: 10 * Division: 00   Choose Continue. |  |  |
| 5 | Enter Order Details | On the Create Standard Order: Overview screen, make the following entries   * Sold-to Party: 10100003 * Ship-to Party: 10100003 * Customer Reference: <Reference> * Cust. Ref. Date: <Date> * Material number: SM0001 * Order Quantity: <Quantity> |  |  |
| 6 | Save Document | Choose Save Document. Make a note of the sales order number: \_\_\_\_\_\_\_\_\_\_. | The order is saved and the order confirmation is printed out. |  |

Printing form

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log On | Log on to the SAP Fiori launchpad as an Internal Sales Representative. | The SAP Fiori launchpad displays. |  |
| 2 | Access the App | Open Manage Sales Orders (F1873). | The Manage Sales Orders screen displays. |  |
| 3 | Search for Sales Order | Enter search term(s) in filter bar and choose Go:  Sales Order: <Sales Order Number> | Sales order is displayed in result list. |  |
| 4 | Navigate to Sales Order Screen | Choose > on the right side of the Sales Order item and navigate to Display Standard Orders xxx: Overview screen. | The Display Standard Orders xxx: Overview screen displays. |  |
| 5 | Check Output Condition | On the Display Standard Orders xxx: Overview screen, choose More > Extras > Output > Header > Print Preview . |  |  |
| 6 | Display Print Preview | On the Display Standard Order xxx: Output screen, select the line already created for the print output and choose Display PDF Document | Preview for PDF document displays. |  |

Note It can also be navigated to a fact sheet screen in Manage Sales Orders (F1873) app:

1. On Manage Sales Orders screen, enter search terms in filter bar and choose Go.
2. In search result, choose your Sales Order Number, and choose More Links.

## Process Sales Order Approval (Optional)

Follow the procedure for Process Sales Order Approval steps in the Sell from Stock (BD9) scope item.

Purpose

This process step shows you how to review the sales orders that might need to be approved.

Procedure

Complete the activities of Process Sales Order Approval described in the test script of Sell from Stock (BD9) scope item.

## Credit Management - Review Blocked Sales Orders (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

This optional process shows you how to review sales orders that might have been blocked due to the credit limit check.

Procedure

Complete all the activities described in Basic Credit Management (BD6) scope item.

## Create Billing Document

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

In this activity, you handle the billing.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as a Billing Clerk. | The SAP Fiori launchpad displays. |  |
| 2 | Access the App | Open Create Billing Documents (F0798). | The Create Billing Documents screen displays. |  |
| 3 | Define Billing Setting | Choose Billing Settings in the bottom bar. Select the following settings and choose OK:   1. Set billing date and type before billing: ON 2. Create separate billing document for each item of billing due list: OFF 3. Automatically post billing documents: ON 4. Display billing documents after creation: ON |  |  |
| 4 | Search for Billing Due List | In the search condition, use criteria if necessary. | Sales document(s) will display in the result. |  |
| 5 | Select item(s) for Billing | Select row(s) of SD Document created previously and choose button Create. | The Creating Billing Documents window displays. |  |
| 6 | Maintain Billing Date | Choose billing type Invoice (F2) and maintain billing date. For example: current date, then choose OK. | The draft billing document with ID Sxxxxxxxx will be displayed. |  |
| 7 | Save Billing Document | On the Billing Document screen, choose Save.  The draft version billing document with ID Sxxxxxxxx turns into a saved billing document with ID xxxxxxxx.  Make a note of the billing document number: \_\_\_\_\_\_\_\_\_\_ | The system generates an invoice for billing.   * Material: Services (SERV) * Debited Accounts: 10100003 Rcvbls Domestic DE Customer 3 * Credited Accounts: 41000000 Rev Domestic Prod   22000000 Output tax (MWS)   * Cost Element / CO Object: none |  |
| 8 | Access the App | Open Manage Billing Documents (F0797) | The Manage Billing Documents screen displays. |  |
| 9 | Search for Previous Billing Document | If your billing document number does not show up in the results area, use the Billing Document field to help search for the billing document created in previous step. | The billing document created in the previous step displays. |  |
| 10 | Display Billing Document | Select the billing document item and choose Display. | The Billing Document displays. |  |
| 11 | Check Output Condition | On the Billing Document screen, choose the last assignment block, Output Items.  You may need to use the arrows to scroll to the end of the list to locate Output Items. | There is one entry in the item with BILLING\_DOCUMENT output type. |  |
| 12 | Display Print Preview | On the Billing Document screen, choose Preview. | Preview for PDF document displays. |  |
| 13 | Cancel Billing Document (Optional) | Select certain Billing document, and choose Cancel Billing Docs. | There is a log display: Billing Document Canceled. |  |
| 14 | Update New Attachment (Optional) | In the Edit mode, add, delete and update the attachments.  Save your changes by pressing Save in the footer bar. |  |  |
| 15 | Update New Text (Optional) | In the Edit mode, add, delete and update the text.  Save your changes by pressing Save in the footer bar. |  |  |

# Appendix

## Process Integration

The process to be tested in this test script is part of a chain of integrated processes.

### Succeeding Processes

|  |  |
| --- | --- |
| Process | Business Condition |
| Accounts Receivable (J59) | Posting a Customer Invoice in Accounting, etc.  Using the master data from this document, complete the following activities described in the test script:  Posting a Customer Invoice in Accounting  Overdue Receivables, Display Customer Balances  Manage Customer Line Items |
| Sales Order Fulfillment Monitoring (BKK) (optional) | This scope item describes the collection of periodic activities such as day ending activities, or reporting.  Using the master data from this document, complete all the activities described in the Test Script of the scope item:  Review Incomplete SD Documents (deliveries),  Review Sales Documents blocked for billing  Review Log of collective invoice creation |
| Analytical Content: Order-to-Cash(BHI) (Optional) | This scope item describes the detailed procedure for testing the scope item Analytical Content for SAP S/4 HANA after solution activation.  Using the reports from this document, complete all the activities described in the Test script of the scope item. |

## Limitations

Please consider that Sale of Services (2EQ) is not covering the processing of a service order until confirmation. This is addressed by Service Order Management and Monitoring (3D2) in context of service management. Sale of Service rather covers the selling of items in a sales order without delivery and direct (order-related) billing.

## Scheduling Job Creation (optional)

### Scheduling Job for Billing Creation (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

This process step shows you how to define the schedule background job for creation billing documents.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1. | Log On | Log on to the SAP Fiori launchpad as a Billing Clerk. | The SAP Fiori launchpad displays. |  |
| 2. | Access the App | Open Schedule Billing Creation (F1519). | The Application Jobs displays. The app shall be started with the history of application jobs. |  |
| 3. | Create Billing Creation Schedule | Choose New to define a new job for billing creation. | The New Job screen displays. Job Template should default as Schedule Billing Creation. |  |
| 4. | Job Parameters | Define scheduling options and parameter section for batch job if necessary, then choose Check. | The system displays the message Go ahead and schedule the job. |  |
| 5. | Schedule | Choose Schedule. | A billing creation job is scheduled. Screen back to Application Jobs. |  |
| 6. | Check Billing Creation Job Log | In screen Application Jobs, after status of job item turn to finish, choose Job Log.  Note Choose Magnifier, the job list refreshes. | Screen goes to log details. |  |

### Scheduling Job for Billing Release (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

This process step shows you how to define the schedule background job for release billing documents to accounting.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1. | Log On | Log on to the SAP Fiori launchpad as a Billing Clerk. | The SAP Fiori launchpad displays. |  |
| 2. | Access the App | Open Schedule Billing Output. | The Application Jobs displays. The app shall be started with the history of application jobs. |  |
| 3. | Create Billing Release Schedule | Choose New to define a new job for billing creation. | The New Job screen displays. Job Template should be default as Schedule Billing Release. |  |
| 4. | Job Parameters | Define scheduling options and parameter section for batch job if necessary, then choose Check. | The system displays the message Go ahead and schedule the job. |  |
| 5. | Schedule | Choose Schedule. | A billing release job is scheduled. Screen back to Application Jobs. |  |
| 6. | Check Billing Release Job Log | In screen Application Jobs, after job item’s status turn to Finish, choose Job Log.  Note Choose Magnifier, the job list will refresh. | Screen goes to log details. |  |

### Scheduling Job for Billing Output (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

This process step shows you how to define the schedule background job for when and how billing documents are sent to customer.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1. | Log On | Log on to the SAP Fiori launchpad as aBilling Clerk | The SAP Fiori launchpad displays. |  |
| 2. | Access the App | Open Schedule Billing Release (F1518). | The Application Jobs displays. The app shall be started with the history of application jobs. |  |
| 3. | Create Billing Output Schedule | Choose New to define a new job for billing creation. | The New Job screen displays. Job Template should be default as Schedule Billing Output. |  |
| 4. | Job Parameters | Define scheduling options and parameter section for batch job if necessary, then choose Check. | The system displays the message Go Ahead and Schedule the Job. |  |
| 5. | Schedule | Choose Schedule. | A billing output job is scheduled. Screen back to Application Jobs. |  |
| 6. | Check Billing Output Job Log | In screen Application Jobs, after job item’s status turn to finish, choose Job Log.  Note Click Magnifier, the job list will refresh | Screen goes to log details. |  |

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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