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| Test ScriptSAP S/4HANA - 18-09-20 | public |
| Presales Management (41V\_DE) |

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# Purpose

This scope item describes how a sales employee can capture and manage tasks, leads and opportunities to help successfully close a sales cycle.

Task management helps to organize and record all of a sales employees' activities. You can maintain types, categories and goals for your activities. Lead management enables sales employees to create and process leads, that is, initial signs of interest in your business. An opportunity describes the sales prospect, their requested products or services, budget, potential sales volume, and the estimated sales probability. The sales cycle of a product or service begins when an opportunity for sales is recognized and the process ends with a sales quote or sales order, or a rejection from the customer.

The tight integration between tasks, leads, opportunities and sales transactions ensures that you can track all sales activities from beginning to end and efficiently lead the sales employees through the sales cycle.

# Prerequisites

## System Access

|  |  |
| --- | --- |
| System | Details |
| SAP S/4HANA | Accessible via SAP Fiori launchpad. Your system administrator provides you with the relevant URL. |

## Roles

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

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

For more information about business roles, refer to the 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).

Fiori Frontend Roles

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name (Role) | ID (Role) | Description (Space) | ID (Space) | Log On |
| Sales Manager (Customer Management) | SAP\_BR\_CUSTOMER\_SALES\_MGR | N/A | N/A |  |

Application Business Roles

The business roles in the following table contain authorization and navigation objects specific to the SAP S/4HANA Service application for Presales. Your system administrator can use them as templates to create customer-specific business roles with the appropriate authorizations.

|  |  |
| --- | --- |
| Name (Role) | ID (Role) |
| S4CRM UIU - Sales Professional | SAP\_S4C\_UIU\_SLS\_PRO |
| CRM Role for UIU Framework | SAP\_CRM\_UIU\_FRAMEWORK |

In addition to these Presales-specific authorizations, generic SAP application access must be granted by your system administrator. The system administrator assigns all required application business roles to your system user.

Note For detailed information about roles and authorizations, refer to the SAP S/4HANA security guide at <https://help.sap.com/viewer/product/SAP_S4HANA_ON-PREMISE> > Implement.

## Master Data, Organizational Data, and Other Data

The 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 | TG11 | Trading Good for Reg. Trading |  |
| Material | SM0001 | Service Material 01 |  |
| Material | NS0002 | Non-stock Material 02 |  |
| Sold-to party | 10100001 | Customer domestic 01 |  |
| Contact Person | 1091005 | Ms.Alina Müller |  |
| Contact Person | 1091006 | Mr.Alexander Linke |  |
| 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 |  |

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 1: Master Data Script Reference

|  |  |
| --- | --- |
| MDS | Description |
| BNF | Create Product Master of Type "Trading Good" |
| BND | Create Customer Master |
| 31X | Create Product Master of Type "Services" |
| 31Y | Create Product Master of Type "Non-Stock Material" |

## Preliminary Steps

### Maintain Responsible Employee for Account

Purpose

In order to automatically determine sales representative in the transaction type for presales, it’s necessary to maintain the test employee as responsbile employee for the account.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1 | Log on | Open the SAP Fiori launchpad as a Sales Manager (Customer Management). | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open Search Accounts (Corporate or Individual Accounts). | Search: Accounts is displayed. |  |
| 3 | Search Account | Enter account 10100001 in the filed: Account ID, choose Search | Corporate Account screen opens. |  |
| 4 | Maintain Employee Responsible | Choose Edit, input your test employees as Employee in the Employee Responsible area. | Employee ID is displayed automatically. |  |
| 5 | Save your Data | Choose Save. | Message shows up: Data has been saved. |  |

# 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 | Transaction/App Name | Expected Results |
| [Create a Task for an Account](#unique_8) [page ] 10 | Sales Manager (Customer Management) | CreateTask | Task is created without error. |
| [Create Lead Manually](#unique_9) [page ] 11 | Sales Manager (Customer Management) | Create Lead | Lead is created without error. |
| [Rule-Based Lead Distribution](#unique_10) [page ] 13 | Sales Manager (Customer Management) | Search Leads | Employee Responsible and Status can be changed according to the defined Rule Policy. |
| [Qualify Lead](#unique_11) [page ] 14 | Sales Manager (Customer Management) | Search Leads | Qualification is changed according to the answered survey. |
| [Create Opportunity](#unique_12) [page ] 16 | Sales Manager (Customer Management) |  |  |
| [Automatic Opportunity Creation from the Lead](#unique_13) [page ] 16 | Sales Manager (Customer Management) | My Inbox | A decision is made based on the workflow to create opportunity automatically. |
| [Manually Create Follow-up Opportunity from an Activity](#unique_14) [page ] 17 | Sales Manager (Customer Management) | Search Activities | Opportunity is created out of the activity via a Follow-Up. |
| [Manually Create Follow-up Opportunity from the Lead](#unique_15) [page ] 19 | Sales Manager (Customer Management) | Search Leads | Opportunity is created out of the Lead via a Follow-Up. |
| [Qualifiy Opportunity](#unique_16) [page ] 20 | Sales Manager (Customer Management) | Search Opportunities | Information gained in stage 2 is maintained successfully in the opportunity. |
| [Create Sales Quotation Against Opportunity](#unique_17) [page ] 22 | Sales Manager (Customer Management) | Search Opportunities | Opportunity is prepared for Quotation and follow up to Sales quotation successfully. |
| [Close Opportunity](#unique_18) [page ] 24 | Sales Manager (Customer Management) | Search Opportunities | Win\_loss Analysis is finished successfully and Close opportunity for Sales Order. |
| [Create Sales Order Against Sales Quotation](#unique_19) [page ] 25 | Sales Manager (Customer Management) | Search Sales Quotations | Sales Order from a existing Quotation is created as a Follow-Up action. |

# Test Procedures

## Create a Task for an Account

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 sales employee creates a task in the customer account.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1 | Log on | Open the SAP Fiori launchpad as a Sales Manager (Customer Management). | The SAP Fiori launchpad is displayed. |  |
| 2 | Access APP | Open Create Task. | Task: new page is displayed. |  |
| 3 | Create Activity | On the Task Details assignment block, make the following entries:Description: Customer Visit for Product PresentationStart Date: DateDue Date : DateImportants: HighAccount: 10100001Choose Enter. |  |  |
| 4 | Maintain Org Data | On the Sales area in the Organization Data assignment block, enter Sales Organizational Unit 1010 , choose Enter.If Organization Data assignment block is invisible, choose Personalization, on the following pop-up window, set the Organizational Data as Display and Display Expanded by checking the box, and then choose Save. | Partner Selection Document header window pops up. |  |
| 5 | Choose Contact Person and Save | Select one contact person in the pop-up window, for example Ms.Susan Miller Choose Save. | Transaction XX saved. |  |

## Create Lead Manually

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 purpose of the following steps is to create Leads manually.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1 | Log on | Open the SAP Fiori launchpad as a Sales Manager (Customer Management). | The SAP Fiori launchpad is displayed. |  |
| 2 | Access APP | Open Create Lead. | Lead: new page is displayed. |  |
| 3 | Enter Details | On the Lead: New screen, make the following entries:In the area General DataDescription: <any description>Prospect: 10100001 Customer domestic 01In the Date area,Start Date: <today>End Date: <today + 1 month>In the qualification area,Qualification level: ColdIn the area ClassificationPriority: HighOrigin: Trade fairGroup: Critical Customers | The Prospect Address is automatically determined.Main Contact is derived from the main contact person from the prospect.Employee Responsible is determined by the current user. |  |
| 4 | Assign Products (Optional) | In the Products assignment block, make the following entry.Product: TG11Quantity: NumberChoose Save. | Transaction XX saved. |  |

## Rule-Based Lead Distribution

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 rule-based lead distribution serves to assign business partners to leads that match the conditions of predefined lead distribution rules.The lead distribution can be started on a regular basis when a corresponding background job has been set up.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1 | Log on | Open the SAP Fiori launchpad as a Sales Manager (Customer Management). | The SAP Fiori launchpad is displayed. |  |
| 2 | Access Search View | Open Search Lead. | Search : Leads page is displayed. |  |
| 3 | Search Leads | Enter Prospect ID 10100001 directly or with search help and choose search. |  |  |
| 4 | Open Lead Distribution | In the Result List area, select the leads or choose the Description to go to the display view for lead , then choose Distribute.If field Description is invisible, choose Personalization,on the following pop-up window, set the Width as, for example 100PXand select the display for Description, choose Save. | The Lead- Distribution page opens.Under “Leads To Be Distributed” the respective leads you want to distribute are displayed. |  |
| 5 | Select Rule-Based Distribution | To start a Rule-Based Distribution please switch the Distribution Method from the Manual Employee Selection to Rule-Based Distribution. Choose Update. | Recipient (Employee Responsible) and Status should be changed to the previous employee and corresponding status set in the set-up guide, according to the executed Rule. |  |
| 6 | Save your Data | Choose Save and Back. | The system navigates to the previous page. |  |

## Qualify Lead

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

Lead qualification is needed to collect further information about a customer, so that it can be decided whether the lead can be converted into an opportunity.

According to the selected transaction type the assigned questionnaire will be available in the lead transaction document for further qualification by an employee.

The employee responsible can also gather information about the customer and set a qualification status manually.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1 | Log on | Open the SAP Fiori launchpad as a Sales Manager (Customer Management). | The SAP Fiori launchpad is displayed. |  |
| 2 | Access Search View | Open Search Lead. | Search: Leads page is displayed. |  |
| 3 | Search Leads | Enter Prospect ID 10100001 directly or with search help and choose Search,In the Result List area, choose the Description.If field Description is invisible, choose Personalization on the following pop-up window, set the Width as, for example 100PX and select the display for Description, choose Save. | The Lead display view opens |  |
| 4 | Open Lead Questionnaire | In the Assessments assignment block, select the attached questionnaire LEAD QUESTIONNAIRE by choosing the Edit button. | The questionnaire opens. |  |
| 5 | Answer Questionnaire | Answer the questions and verify that the resulting questionnaire level is Hot in the Qualification of the Lead Details assignment block.Products: NotebooksEmployees: > 500 employeesUnits: > 100 unitsTimeframe: < 3 monthsChoose Save and Back. | After entering answers, the questionnaire level is Hot.Based on the values you entered in the questionnaire, the system automatically determines questionnaire level. |  |
| 6 | Save your Data | Choose Save. | Transaction saved. |  |

## Create Opportunity

### Automatic Opportunity Creation from the Lead

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

Leads must be transferred to Sales (Opportunity Management) in order to create opportunities for them, Before executing this step, please refer the set-up guide for presales management to complete the necessary setting, in order to enable workflow.

The implemented workflow automatically generates opportunities from leads according to the following rules:

Lead is free of errors & lead qualification level = Hot & lead Priority = 1 (Very High) or Lead is free of errors & lead qualification level = Hot & Lead Group = 0001 (Top 100 Customers), Opportunity is created automatically via workflow without further information of the sales employee.

Lead is free of errors & lead qualification level = Hot & lead Priority is not 1 (Very High) & Lead Group is not 0001 (Top 100 Customers) A sales employee (the main Sale Representative in the lead) is informed by workflow and has to decide whether an opportunity needs to be created.

Lead qualification level is not Hot No workflow will be started, which means that an opportunity can only be created manually from the lead by the sales employee.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1 | Log on | Open the SAP Fiori launchpad as a Sales Manager (Customer Management). | The SAP Fiori launchpad is displayed. |  |
| 2 | Access the App | Open My Inbox.Note If this particular user doesn’t have My Inbox APP, you need to assign SAP Fiori Tile Catalog SAP\_SD\_BC\_MYINBOX and SAP Fiori Tile Group SAP\_SD\_BCG\_MYINBOX to the business role of the user. | The My Inbox screen is displayed. |  |
| 3 | Make Decision for Work item | Choose Create Opportunity for any task.In the following pop-up win-dow,make any note, choose Submit. | Task successfully processed. |  |

### Manually Create Follow-up Opportunity from an Activity

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 purpose of the following steps is to create a Opportunity out of the activity via a Follow-Up.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1 | Log on | Open the SAP Fiori launchpad as a Sales Manager (Customer Management). | The SAP Fiori launchpad is displayed. |  |
| 2 | Access Search View | Open Search: Activities. | Search Activities page is displayed. |  |
| 3 | Search Activities | Enter Account ID 10100001 directly or with search help and choose search,In the Result List area, choose the Description for the previous task.If field Description is invisible, choose Personalization on the following pop-up window, set the Width, for example 100PX and select the Display for Description, choose Save. | The Activity display view opens. |  |
| 4 | Complete Activity | Choose Set to Completed on the display view for activity, and then choose Save. | Transaction XX saved. |  |
| 5 | Follow up Opportunity | Choose Follow-Up button on the display view for activity. | After highlighting the desired transaction type the popup should disappear. |  |
| 6 | Select Transaction Type | In the appearing popup choose the respective transaction type Opportunity Sales Methodology (OPSM). | Sales Methodology: New page opens. |  |
| 7 | Add Opportunity Details | Make the required entries in the Opportunity Details assignment block.Closing Date: Start Date+ 3 daySales Stage: Identify OpportunityStatus: In processOpportunity Group: Strategic Project | The Chance of Success changes to 10%. |  |
| 8 | Save your Data | Choose Save. | Transaction xx saved. |  |

### Manually Create Follow-up Opportunity from the Lead

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 purpose of the following steps is to create a Opportunity out of the created and qualified Lead via a Follow-Up.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1 | Log on | Open the SAP Fiori launchpad as a Sales Manager (Customer Management). | The SAP Fiori launchpad is displayed. |  |
| 2 | Access Search View | Open Search Lead. | Search Leads page is displayed. |  |
| 3 | Search Leads | Enter Prospect ID 10100001 directly or with search help and choose Search,In the Result List area, choose Description.If field Description is invisible, choose Personalization on the following pop-up window, set the Width, for example 100PX and select the Display for Description, choose Save. | The Lead display view opens. |  |
| 4 | Follow up Opportunity | Choose Follow-Up button on the display view for lead. | After highlighting the desired transaction type the popup should disappear. |  |
| 5 | Select Items | In the appearing popup choose the respective transaction type Opportunity Sales Methodology (OPSM). Select the Items you want to take from the Lead to the Opportunity from the appearing Follow-Up - Select Items popup, then choose Choose. | Item(s) should be taken over to the opportunity and popup should be disappearing after choosing Choose |  |
| 6 | Add Opportunity Details | Make the required entries in the Opportunity Details assignment block.Closing Date: <Start Date+ 3 day>Sales Stage: Identify OpportunityStatus: In processOpportunity Group: Strategic Project | The Chance of Success changes to 10%. |  |
| 7 | Save your Data | Choose Save. | Transaction xx saved. |  |

## Qualifiy Opportunity

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

Use this procedure to process the opportunity with data gained in sales stage 2. The data, such as requirements analysis, the prospect’s decision-making process, and so on can be entered in the system.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log on | Open the SAP Fiori launchpad as a Sales Manager (Customer Management). | The SAP Fiori launchpad is displayed. |  |
| 2 | Access Search View | Open Search Opportunities. | Search Opportunities page is displayed. |  |
| 3 | Search Opportunity | Enter Prospect ID 10100001 directly or with search help and choose Search,In the Result List area, choose Description.If field Description is invisible, choose Personalization on the following pop-up window, set the width as, for example 100PX and select the Display for Description, choose Save. | The opportunity display view opens. |  |
| 4 | Change the Sales Stage | In the Opportunity Details assignment block, choose Edit, and make the required entry.Sales Stage: Qualification | The Chance of Success changes to 20%. |  |
| 5 | Open Sales Assistant | Choose Sales Assistant. | The Sales Assistant page opens and suggests activities that should be considered during the current phase. |  |
| 6 | Activate a Suggested Task | To automatically create an activity, you must activate the corresponding Recommended Activity. Select the activity and choose Activate.For example, select Determine Decision Maker and choose Activate.Then choose Back. | The system automatically creates an activity for each activated recommended activity. |  |
| 7 | Add a Product | In the Items assignment block, add a Product and corresponding Quantity ,choose Enter for example:Product: TG11Quantity: 2 | The products appear in the Items assignment block.The Expected Total Value field is filled automatically. |  |
| 8 | Enter Expected Sales Volumes | In the Opportunity Details assignment block,enter the Expected Sales Volume. Save your entries. | Weighted Expected Sales Volume is equal to Expected Sales Volume\*Chance of Success. |  |
| 9 | Update Milestones | In the Milestones assignment block, enter the required data, for exampleDemonstration: DATEInitial Requirement Analysis: DATE* If Milestones assignment block is invisible, choose Personalization,on the following pop-up window, set the Milestones as Display and Display Expanded by checking the box, and then choose Save.
 |  |  |
| 10 | Save your Data | Choose Save | Transaction xx saved. |  |

## Create Sales Quotation Against Opportunity

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

Use this procedure to process to prepare the Opportunity for a Quotation and to create a Appointment as a Follow-Up out of the Opportunity.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log on | Open the SAP Fiori launchpad as a Sales Manager (Customer Management). | The SAP Fiori launchpad is displayed. |  |
| 2 | Access Search View | Open Search Opportunities. | Search Opportunities page is displayed. |  |
| 3 | Search Opportunity | Enter Prospect ID 10100001 directly or with search help and choose search,In the Result List area, choose Description.If field Description is invisible, choose Personalization on the following pop-up window, set the width as, for example, 100PX and select the Display for Description, choose Save. | The opportunity display view opens. |  |
| 4 | Change the Sales Stage | In the Opportunity Details assignment block, choose Edit and enter the Sales Stage:Quotation, then choose Save. | The Chance of Success changes to 50%. |  |
| 5 | Follow-Up Quotation | Create a quotation for the prospect. Make sure there is no red traffic light.On the Opportunity Page, choose Follow-Up. | The Follow-Up pop-up appears. |  |
| 6 | Select Quotation Type and Product | Choose Sales Quotation, then on the following pop-up window select the product, choose Choose. | Quotation: New page opens. |  |
| 7 | Enter Valid To Date | Enter a Valid To : Today+1 month. |  |  |
| 8 | Check Incompletion Log | Check whether there are entries in the assignment block Incompletion Log and enter missing data in case required. | There are no incompletion entries. |  |
| 9 | Save your Data | Choose Save. | Transaction xx saved. |  |

## Close Opportunity

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

Use this procedure to close the opportunity with data collected in sales stage 5. In this phase you negotiate the conditions for the sales order as well as analyze reasons for success or failure.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1 | Log on | Open the SAP Fiori launchpad as a Sales Manager (Customer Management). | The SAP Fiori launchpad is displayed. |  |
| 2 | Access Search View | Open Search Opportunities. | Search Opportunities page is displayed. |  |
| 3 | Search Opportunity | Enter Prospect ID 10100001 directly or with search help and choose Search,In the Result List area, choose Description.If field Description is invisible, choose Personalization on the following pop-up window, set the width as, for example 100PX and select the Display for Description, choose Save. | The opportunity display view opens. |  |
| 4 | Change the Status and Sales Cycle | In the Opportunity Details assignment block, choose Edit. Enter the Sales Stage: Close, and Status: Won. | The Closing Date has been reset to today's date. |  |
| 5 | Finish Win or Loss Analysis | In the Assessments assignment block, choose Edit, in order to answer the questionnaire Win\_Loss Analysis. | Questionnaire opens. |  |
| 6 | Save your answer | Answer the questionnaire accordingly, then choose Save and Back. | Back to the opportunity. |  |
| 7 | Save your Data | Choose Save. | Transaction XX saved. |  |

## Create Sales Order Against Sales Quotation

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

Use this procedure to create a Sales Order from a existing Quotation as a Follow-Up action.

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Pass / Fail / Comment |
| 1 | Log on | Open the SAP Fiori launchpad as a Sales Manager (Customer Management). | The SAP Fiori launchpad is displayed. |  |
| 2 | Access Search View | Open Search Sales Quotations. | Search : Sales Quotation page is displayed.. |  |
| 3 | Search Quotation | Enter Quotations ID Previous Sales Quotation Number directly and choose Search. | The quotation display view opens. |  |
| 4 | Create Follow-up | Choose Create Follow-Up from the work area toolbar. | Select Transaction Type pop-up opens. |  |
| 5 | Select Sales Order Transaction | The system offers you several transaction typesto create a follow up. Choose Sales Order. | Item-select pop-up opens. |  |
| 6 | Copy Products | In the dialog box that appears, select the item tobe copied, choose Choose. | Standard Order: New page opens. |  |
| 7 | Enter External Reference | Enter a value in the field External Reference for example, Purchase Order Number from Customer |  |  |
| 8 | Check Incompletion Log | Check whether there are entries in the Incompletion Log assignment block, and enter missing data if required. | There are no incompletion entries. |  |
| 9 | Save | Choose Save. | Sales order has been created based on the data of the quotation. |  |

## Appendix

### Process Integration

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

### Succeeding Processes

After completing the activities in this test script, you can continue testing the following business processes:

|  |  |
| --- | --- |
| Scope Item | Business Condition |
| BD9 - Sales from Stock |  |

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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