

SCM940 Assignment 4.1 Inquiry to Quotation

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Please create and insert requested print screens and answers directly on this document and attach the document to assignment 4.1 in Blackboard. (10 marks)

In this exercise, we will review the Sales Inquiry we made in last class in Assignment 3.1, convert it to a sales quotation and finally into a sales order. **There is no Data Assignment Sheet for this assignment.**

PART 1 CREATE A SALES QUOTATION WITH REFERENCE TO A PREVIOUS SALES INQUIRY

Logistics > Sales and Distribution > Sales > Inquiry > Change VA12 - Change

1. Go to the Sales Inquiry you created in the last assignment in maintenance mode and answer the following:
2. What were the terms of payment in the Inquiry? ZB00 Pay Immediately w/o deduction

Change Inquiry 10000142: Overview

Inquiry: 10000142 Net value: 0.00 EUR

Sold-To Party: 26022 Madrid Sanchez Speciality Meats / Venusstr, 26022 / D-20111 ...

Ship-To Party: 26022 Madrid Sanchez Speciality Meats / Venusstr, 26022 / D-20111 ...

PO Number: PO date:

Sales Item overview Item detail Ordering party Procurement Shipping Reason for rejection

Req. deliv.date: D 01/27/2020 Deliver.Plant:

Valid from: Valid to:

Complete div. Total Weight: 20 KG

Pricing date: 01/26/2020

Total amount: 0.00 Doc. Currency: EUR / 1.00000

Payment terms: ZB00 Pay immediately w/o... Incoterms: CFR Hamburg

Order reason:

Sales area: 1000 / 12 / 00 Germany Frankfurt, Sold for resale, Cross-division

All items

Item	Material	Order Quantity	Un	Description	S	Customer Material Numb
	10 NEW-AS1022		5 PC	Madrid_Sanchez	<input type="checkbox"/>	
	20 NEW-AS2022		5 PC	Madrid_Sanchez	<input type="checkbox"/>	
					<input type="checkbox"/>	

SCM940 Assignment 4.1 Inquiry to Quotation

3. What was the delivery plant in the Inquiry? 1000

Change Inquiry 10000142: Overview

Icons:

Inquiry	10000142	Net value	0.00	EUR
Sold-To Party	26022	Madrid Sanchez Speciality Meats / Venusstr, 26022 / D-20111 ...		
Ship-To Party	26022	Madrid Sanchez Speciality Meats / Venusstr, 26022 / D-20111 ...		
PO Number		PO date		

Navigation: Sales | Item overview | Item detail | Ordering party | Procurement | **Shipping** | Reason for rejection

Complete div.	<input type="checkbox"/>	Total Weight	20	KG
Delivery block		Volume	0.000	
Overall status	Open	Delivery status		

All items

Item	Material	D...	DlvDateFo...	N..	Delivery Date	Mat.Av.Dt.	Loading D...	Plnt	Shi...	Route	P..	D..	De
10	NEW-AS1022		01/27/2020	<input type="checkbox"/>	01/27/2020	01/27/2020	01/27/2020	1000	2023				
20	NEW-AS2022		01/27/2020	<input type="checkbox"/>	01/27/2020	01/27/2020	01/27/2020	1000	2023				

4. Locate and take a print screen of the product availability for both of the items in your inquiry. (Look for the Availability Icon). Please use Snipping Tool.

Change Inquiry 10000142: Overview

Icons:

Inquiry	10000142	Net value	0.00	EUR
Sold-To Party	26022	Madrid Sanchez Speciality Meats / Venusstr, 26022 / D-20111 ...		
Ship-To Party	26022	Madrid Sanchez Speciality Meats / Venusstr, 26022 / D-20111 ...		
PO Number		PO date		

Navigation: Sales | Item overview | Item detail | Ordering party | Procurement | **Shipping** | Reason for rejection

Req. deliv.date	D	01/27/2020	Deliver.Plant		
Valid from			Valid to		
<input type="checkbox"/> Complete div.			Total Weight	20	KG
Total amount		0.00	Pricing date	01/26/2020	
Payment terms	ZB00	Pay immediately w/...	Doc. Currency	EUR / 1.00000	
Order reason			Incoterms	CFR Hamburg	
Sales area	1000 / 12 / 00	Germany Frankfurt, Sold for resale, Cross-division			

All items

Item	Material	Order Quantity	Un	Description	S	Customer Material Numb
10	NEW-AS1022		5 PC	Madrid_Sanchez	<input type="checkbox"/>	
20	NEW-AS2022		5 PC	Madrid_Sanchez	<input type="checkbox"/>	

Bottom icons:

Group

SCM940 Assignment 4.1 Inquiry to Quotation

Availability Overview

Stock
 Stock
 Totals records
 Totals records
 Scope of check

Material: **NEW-AS1022** Madrid_Sanchez

Plant: 1000 Avail. check: 01 Check.rule: A
 MRP Area: 1000 With reqmts qtys
 Base Unit: PC End lead time: 01/31/2020

Totals display

Receipts	100	Issues	0	Confrmd issues	0
----------	-----	--------	---	----------------	---

ATP situation

Date	MRP ...	MRP element data	Rec./reqd qty	Confirmed	Cum. ATP qty
01/30/2020	Stock		100		100
01/30/2020	StLcSt	0001	100		100

Availability Overview

Stock
 Stock
 Totals records
 Totals records
 Scope of check

Material: **NEW-AS2022** Madrid_Sanchez

Plant: 1000 Avail. check: 01 Check.rule: A
 MRP Area: 1000 With reqmts qtys
 Base Unit: PC End lead time: 01/31/2020

Totals display

Receipts	100	Issues	0	Confrmd issues	0
----------	-----	--------	---	----------------	---

ATP situation

Date	MRP ...	MRP element data	Rec./reqd qty	Confirmed	Cum. ATP qty
01/30/2020	Stock		100		100
01/30/2020	StLcSt	0001	100		100

SCM940 Assignment 4.1 Inquiry to Quotation

5. What availability check code was used on your order and what does that code mean?

Availability check 01, it tell us all the stuff has been checked on this.

Availability Overview

Stock Stock Totals records Totals records **Scope of check**

Material: NEW-AS1022
Plant: Madrid_Sanchez
MRP Area: 1000
Base Unit: PC

Avail. check: **01** Check.rule: A

With reqmts qtys

End lead time

Totals display
Receipts: 100
Issues: 0 Confmrd issues

ATP situation

Date	MRP ...	MRP element data
01/30/2020	Stock	
01/30/2020	StlcSt	0001

Display Scope of Check

Availability check: **01** Include requirements
Checking rule: A SD order

Stock overview

- Include safety stock
- Incl.stock in transfer
- Incl.quality insp. stock
- Include blocked stock
- Include restricted-use stock
- W/o subcontracting

Replenishment lead time

- Check without RLT

Storage location inspection

- No storage location inspection

In/outward movements

- Incl.purchase orders
- Incl. purch.requisitions
- Incl. dependent reqs
- Include reservations
- Include sales reqmts
- Include deliveries
- Incl.ship.notificat.
- Incl.depen.reservat. Do not check
- Incl.rel.order reqs Do not check
- Incl. planned orders Do not check
- Incl. production orders Do not take into ...

Receipts in the past

- B Include future receipts only

6. Click on the Document Flow Icon and take a print screen of it. Please use Snipping Tool.

Sales document Edit Goto Extras Environment System Help

Change Inquiry 10000142: Overview

Document Flow Icon

Inquiry: 10000142 Net value: 0.00 EUR

Sold-To Party: 26022 Madrid Sanchez Specialty Meats / Venusstr, 26022 / D-20111 ...

Ship-To Party: 26022 Madrid Sanchez Specialty Meats / Venusstr, 26022 / D-20111 ...

PO Number: PO date:

Sales Item overview Item detail Ordering party Procurement Shipping Reason for rejection

Req. deliv.date: D 01/27/2020 Deliver.Plant: Valid from: Valid to: Total Weight: 20 KG Pricing date: 01/26/2020

Complete div. Total amount: 0.00 Doc. Currency: EUR / 1.00000

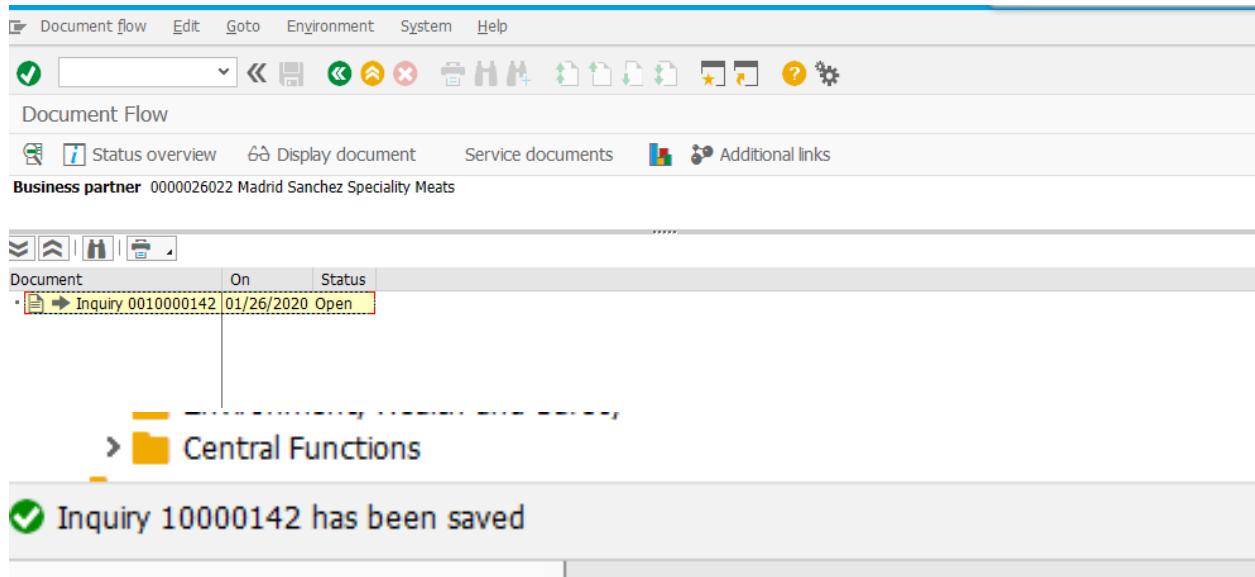
Payment terms: ZB00 Pay immediately w/... Incoterms: CFR Hamburg

Order reason: Sales area: 1000 / 12 / 00 Germany Frankfurt, Sold for resale, Cross-division

All items

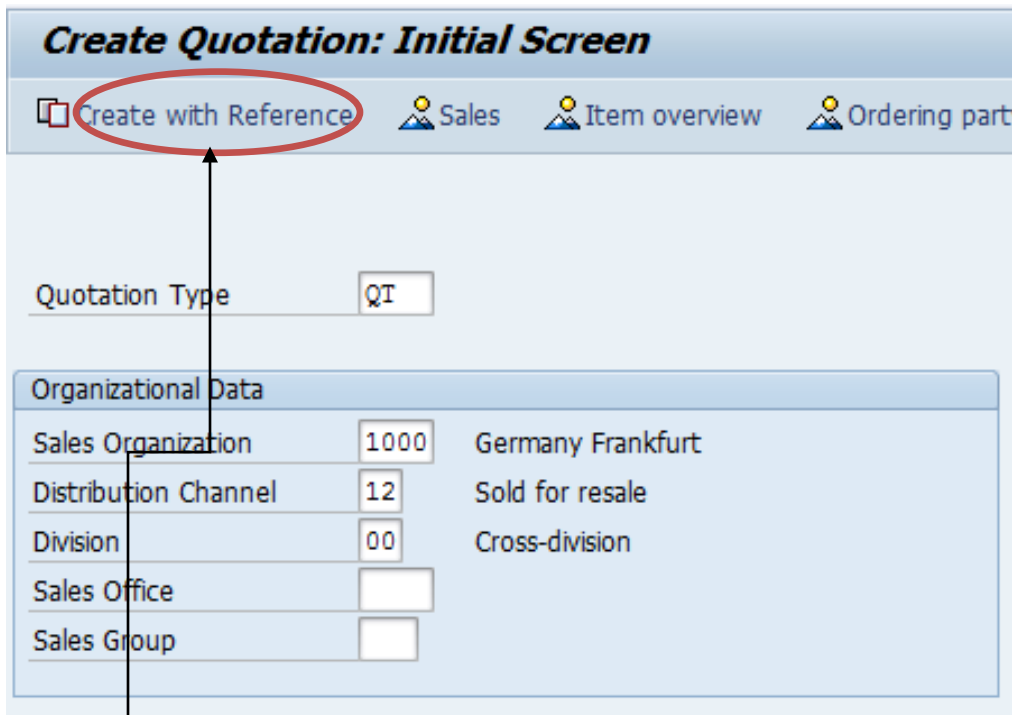
Item	Material	Order Quantity	Un	Description	S	Customer Material Numb
10	NEW-AS1022		5 PC	Madrid_Sanchez	<input type="checkbox"/>	
20	NEW-AS2022		5 PC	Madrid_Sanchez	<input type="checkbox"/>	

SCM940 Assignment 4.1 Inquiry to Quotation



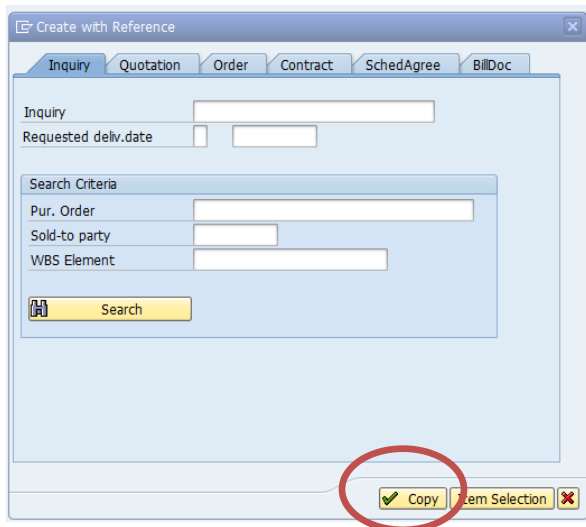
7. The customer that you prepared the inquiry for has decided to move ahead and has asked you for a formal sales quotation. With SAP we can create this quotation from the Inquiry. Go to the Create Sales Quotation screen:

Logistics > Sales and Distribution > Sales > Quotation > Create ()




SCM940 Assignment 4.1 Inquiry to Quotation

8. Select Quotation type QT and click on **“Create with Reference”** icon.



9. Click on the Inquiry tab and search for your inquiry from the last assignment and then click on Copy icon.
10. On Sales tab, make the following changes to the quotation:
- **Make the quotation valid for 1 month from today**
 - **Change the delivery date to 1 month from today**
 - **Change the order quantity to 7 pieces for each part**
 - **Set the price to 25 EUR each**

NOTE: SAP will give you a yellow notice banner in the lower left portion of the screen for each of your changes and stop your progress until you acknowledge each by hitting continue icon 

11. Take a print screen of your quotation showing the Sales tab and insert it here.

SCM940 Assignment 4.1 Inquiry to Quotation

Create Quotation: Overview

Quotation: Net value: 350.00 EUR

Sold-To Party: 26022 Madrid Sanchez Specialty Meats / Venusstr, 26022 / D-20111 ...

Ship-To Party: 26022 Madrid Sanchez Specialty Meats / Venusstr, 26022 / D-20111 ...

PO Number: PO date:

Sales Item overview Item detail Ordering party Procurement Shipping Reason for rejection

Req. deliv.date: D 03/03/2020 Deliver.Plant:

Valid from: Valid to: 03/03/2020

Complete div. Total Weight: 28 EKG

Pricing date: 01/26/2020

Total amount: 402.50 Doc. Currency: EUR / 1.00000

Payment terms: ZB00 Pay immediately w/... Incoterms: CFR Hamburg

Order reason:

Sales area: 1000 / 12 / 00 Germany Frankfurt, Sold for resale, Cross-division

Item	Material	Order Quantity	Un	Description	S	Customer Material Numb	ItCa	DGIP	HL	Itm	D	First date	Pint	Batch	CnTy	Amou
10	NEW-AS1022	7	PC	Madrid_Sanchez	✓		AGN				D	01/27/2020	1000			PR00
20	NEW-AS2022	7	PC	Madrid_Sanchez	✓		AGN				D	01/27/2020	1000			PR00
											D	03/03/2020				
											D	03/03/2020				
											D	03/03/2020				
											D	03/03/2020				
											D	03/03/2020				
											D	03/03/2020				
											D	03/03/2020				
											D	03/03/2020				

Texts

Form Header: English

000020 : PR00 25.00 EUR OK

SCM940 Assignment 4.1 Inquiry to Quotation

Quotation Net value 350.00 EUR

Sold-To Party 26022 Madrid Sanchez Speciality Meats / Venusstr, 26022 / D-20111...

Ship-To Party 26022 Madrid Sanchez Speciality Meats / Venusstr, 26022 / D-20111...

PO Number PO date

Req. deliv.date D 03/03/2020 Deliver.Plant

Valid from Valid to 03/03/2020

Total Weight 28 KG

Pricing date 01/26/2020

Total amount 402.50 Doc. Currency EUR / 1.00000


Payment terms ZB00 Pay immediately w/... Incoterms CFR Hamburg

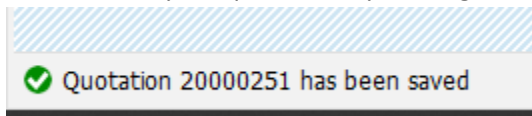
Order reason

Sales area 1000 / 12 / 00 Germany Frankfurt, Sold for resale, Cross-division

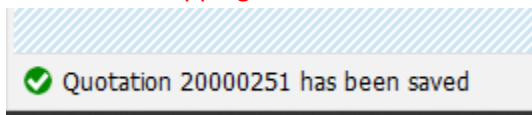
Item	Material	Orde...	Un	Description	S	C...	ItCa	D D.	First date	PInt	Batch	CnTy	Amount	CrCy	Net price	per	U...	Net value
10	NEW-AS1022	7	PC	Madrid_Sanchez	✓		AGN	D	01/27/2020	1000		PR00	25.00	EUR	25.00	1	PC	
20	NEW-AS2022	7	PC	Madrid_Sanchez	✓		AGN	D	01/27/2020	1000		PR00	25.00	EUR	25.00	1	PC	

000020 : PR00 25.00 EUR OK

12. Save your quotation by clicking on the save icon. 



13. Take a print screen of your saved quotation saved banner (as above) and insert here. Please use the Snipping Tool.



SCM940 Assignment 4.1 Inquiry to Quotation

14. Was a Customer Purchase Order Number “required” for the quotation? No , no was necessary for this.

15. Display your Quotation.

Logistics > Sales and Distribution > Sales > Quotation > Display

16. Click on the Document Flow Icon and take a print screen of it and insert it here. Please use the Snipping Tool.

Display Quotation: Initial Screen

Quotation: 20000251

Search Criteria

Purchase Order No.	
Sold-to party	
WBS Element	
Material	

Search

Document Flow

Status overview | Display document | Service documents

Business partner 0000026022 Madrid Sanchez Speciality Meats
Material NEW-AS1022 Madrid_Sanchez

Document	Quantity	Unit	Ref. value	Currency	On	Status
▼ Inquiry 0010000142 / 10	5	PC	0.00	EUR	01/26/2020	Completed
▪ Inquiry → Quotation 0020000251 / 10	7	PC	175.00	EUR	02/03/2020	Open

SCM940 Assignment 4.1 Inquiry to Quotation

PART 2 CREATE A SALES ORDER WITH REFERENCE TO A PREVIOUS SALES QUOTATION

Your customer has received your quotation you created in assignment 3.1 favorably and now wants to place a purchase order with your firm. They send you a purchase order with the following data – **some of which has changed from the quotation** – so you will need to update the sales order from the existing quotation data:

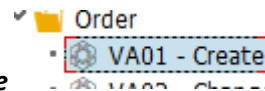
Customer Purchase Order

Customer	26### from Asst 3.1
Customer's Purchase Order Number	4-211
Requested Delivery Date	In 15 days from today
Payment Terms	10 days 2%, 20/2% 30 net

Material Ordered	Quantity
TP-AS1##	10
TP-AS2##	15

Logistics > Sales and Distribution > Sales > Order > Create

Use Order Type OR



Create Sales Order: Initial Screen

Create with Reference Sales Item overview Ordering party

Order Type:

Organizational Data

Sales Organization	1000
Distribution Channel	12
Division	00
Sales Office	
Sales Group	

17. Select Order type OR and click on “Create with Reference” icon.

SCM940 Assignment 4.1 Inquiry to Quotation

The screenshot shows a SAP dialog box titled "Create with Reference" with a close button (X) in the top right corner. The dialog has several tabs: "Inquiry", "Quotation", "Order", "Contract", "SchedAgree", and "BillDoc". The "Quotation" tab is currently selected. Below the tabs, there are input fields for "Quot." and "Requested deliv.date". A "Search Criteria" section contains three input fields: "Pur. Order", "Sold-to party", and "WBS Element". Below these fields is a "Search" button with a magnifying glass icon. At the bottom of the dialog, there are two buttons: "Copy" (with a green checkmark icon) and "Item Selection" (with a red X icon). The "Copy" button is circled in red.

SCM940 Assignment 4.1 Inquiry to Quotation

The screenshot displays the SAP 'Create Sales Order: Initial Screen'. At the top, there is a toolbar with various icons and a dropdown menu. Below the toolbar, the title 'Create Sales Order: Initial Screen' is visible. A navigation bar includes 'Create with Reference', 'Sales', 'Item overview', and 'Ordering party'. The main area shows 'Order Type' set to 'OR' and 'Standard Order'. A section titled 'Organizational Data' contains the following fields:

Sales Organization	1000	Germany Frankfurt
Distribution Channel	12	Sold for resale
Division	00	Cross-division


A search dialog box is open, titled 'Create with Reference'. It has tabs for 'Inquiry', 'Quotation', 'Order', 'Contract', 'SchedAgree', and 'BillDoc'. The 'Quotation' tab is selected. The dialog contains the following fields:

- Quot.: 20000251
- Requested deliv.date: [empty]
- Search Criteria section with fields for:
 - Pur. Order: [empty]
 - Sold-to party: [empty]
 - WBS Element: [empty]

At the bottom of the dialog is a 'Search' button. Below the dialog, there are three buttons: 'Copy', 'Item Selection', and a red 'X' icon.

18. Click on the Quotation tab and search for your quotation from steps 6 – 8 and then click on Copy icon.

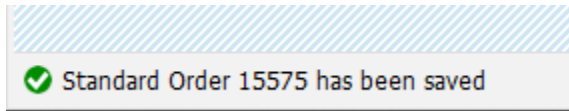
19. Make all required changes to the Sales Order to suit the customers P.O.

NOTE: SAP will give you a yellow notice banner for each of your changes and stop your progress until you acknowledge each by hitting continue icon 

SCM940 Assignment 4.1 Inquiry to Quotation

20. Save the sales order and take a print screen of the Standard Order Creation banner as below.
Please use the Snipping Tool.

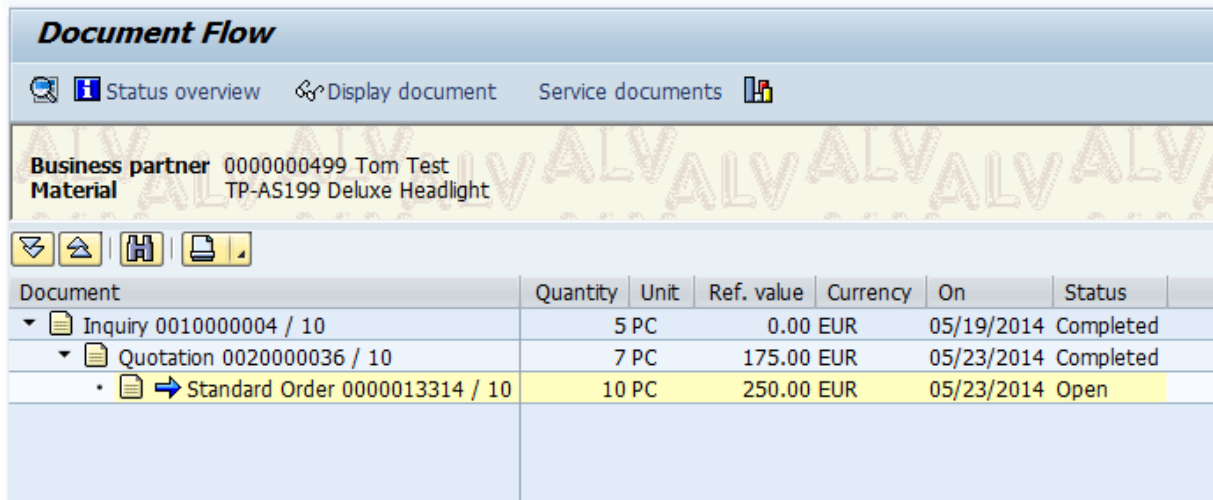
Mine



21. How many schedule lines were created for each item in your sales order? Why?
There were 2 lines, because the first it is when the order is placed and the second line is when the order is confirmed
22. Display your Quotation.

Logistics > Sales and Distribution > Sales > Quotation > Display

23. Click on the Document Flow Icon, take a print screen of it and insert it here. Please use the Snipping Tool.



Document	Quantity	Unit	Ref. value	Currency	On	Status
▼ Inquiry 0010000004 / 10	5	PC	0.00	EUR	05/19/2014	Completed
▼ Quotation 0020000036 / 10	7	PC	175.00	EUR	05/23/2014	Completed
• Standard Order 0000013314 / 10	10	PC	250.00	EUR	05/23/2014	Open

Mine

SCM940 Assignment 4.1 Inquiry to Quotation

Document Flow

Document Flow

Status overview Display document Service documents

Business partner 0000026022 Madrid Sanchez Speciality Meats
Material NEW-AS1022 Madrid_Sanchez

Document	Quantity	Unit	Ref. value	Currency	On	Status
▼ Inquiry 0010000142 / 10	5	PC	0.00	EUR	01/26/2020	Completed
▼ Quotation 0020000251 / 10	7	PC	175.00	EUR	02/03/2020	Completed
▪ Standard Order 0000015575 / 10	10	PC	250.00	EUR	02/03/2020	Open

End of Assignment 4.1