

IMPLEMENTATION OF AN SD RELEASE PROCESS FOR OFFERS

Reduced effort, documentation directly in the system, transparency and seamless transition of processes during system changeover



5.800
Employees



858
Million € Sales



86
Countries



45.000
Customers

In brief ...

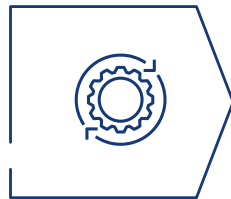
Implementation Highlights

- Implementation of an efficient and transparent, automated approval process for sales documents
- Creation of a flexible approval workflow in combination with BRFplus as part of the international S/4HANA rollout
- Reduced lead time for quotation preparation
- Securing the approval process
- Lighthouse project for SAP Fiori in the company



Attachment Offer

Workflow is started



Determination of the release relevance

Release levels defined via BRF Plus tables and BADI



Workflow processing

- Workflow Item in "My Inbox"
- Reference to "release", "rejection", "review" or "workflow protocol"



Release offer

Offer is implemented in customer order and sent to customers

Overview – SD release process

INITIAL SITUATION

EagleBurgmann has a well-defined approval process for quotations over several stages.

To make approvals more efficient, it was decided to automate the process.

Now that quotations are created in S/4HANA, a flexible workflow and rule-based quotation approval system was sought in this environment that could be rolled out gradually to all national companies.

CHALLENGES AND GENERAL CONDITIONS OF THE PROJECT

At the beginning of the project, challenges initially emerged with regard to customer-specific requirements and the integration of the BRFplus rule set, which went beyond the standard of the S/4HANA 1909 on-premise.

Users wanted an approval option at team level, integrated e-mail dispatch, and a secure review process. In addition, there was a particular focus on ensuring transparency and traceability of the process.

Another customer request was for an additional function to start the approval process, allowing users to control the process manually, whereas in the standard SAP system this happens automatically when the quotation is saved.

After approval, details of the approval process, such as approval status and reasons for the determined approval procedure, were visualized in the quotation for the user.

The approval process was implemented based on four parameters using BRFplus tables. The first parameter was the total value of the quote, which triggers the internal approval process.

Two other parameters were the absolute and percentage deviation of the sales price from the recommended sales price. In addition, the level of the margin was also used as the basis for the release.



Through the implementation of the SD release process we benefit from increased transparency with simultaneous flexibility for adjustments of approval factors.

Dieter Gartner,
Head of Sales IT,
EagleBurgmann GmbH & Co. KG



Quote Approval

Start Approval WF Protocol

Team for Approval: MX01 MX01- Fulano de Tal

Approval Reason: Z031 Level 3 - Header Value

Display EB Quotation 1100142678: Header Data

Status	Approver name	Work item text	Created	Processed	Co
Workflow-Res		Release of Sales Quotation 1100142678	02.09.2022 15:04:43	02.09.2022 15:05:35	
REWORK_REQUE	Matthias Lebschy	Release of Sales Quotation 1100142678	02.09.2022 15:05:36	05.09.2022 08:29:45	
REWORK_COMPL	Matthias Lebschy	Rework of Sales Quotation 1100142678	05.09.2022 08:29:50	05.09.2022 08:29:56	
Workflow-Res		Release of Sales Quotation 1100142678	05.09.2022 08:29:59	05.09.2022 08:30:01	
READY	Jonathan Alon	Release of Sales Quotation 1100142678	05.09.2022 08:30:02	00.00.0000 00:00:00	

SAP Business Rule Framework plus

Entscheidungstabelle: QUOTE_HEAD

Navigation: Zurück, Bearbeiten, Prüfen, Sichern, Aktivieren, Löschen, Mehr

Details: Nach Excel exportieren, Kontextübersicht, Simulation starten

Tabelleneinstellungen

Suchen:	Header level
<input type="checkbox"/> Nettowert	
<input type="checkbox"/> [5.000,00 EUR..50.000,00 EUR]	2
<input type="checkbox"/> [50.000,01 EUR..250.000,00 EUR]	3
<input type="checkbox"/> [250.000,01 EUR..500.000,00 EUR]	4
<input type="checkbox"/> [500.000,01 EUR..1.000.000,00 EUR]	5
<input type="checkbox"/> [1.000.000,01 EUR..25.000.000,00 EUR]	6
<input type="checkbox"/> [2.500.000,01 EUR..5.000.000,00 EUR]	7
<input type="checkbox"/> >5.000.000,00 EUR	8

BENEFITS OF THE SOLUTION

The solution was implemented at EagleBurgmann as a pilot project within three months in the national companies USA, Mexico and Canada. It has automated the approval process for around 2,400 quotations per month.

This not only reduced throughput times, but also created increased traceability and transparency.

Due to its high benefit, this solution has now been activated in four other companies.

The main benefit is defined by the reduced effort, the possibility to document blocking reasons and releases directly in the system, the transparency and the seamless transition of processes during the system change.

The screenshot displays the 'Release Sales Quote' interface for offer number 1100147984 with a value of 85,000.00 AED. The interface is divided into several sections:

- Task List (Left):** A list of tasks including 'Release of Sales Quotation' and 'Process Order Confirmation' with their respective SAP_WFRT and status (Mittel).
- Grunddaten (Basic Data):**
 - Angebot: 1100147984
 - Auftraggeber: Customer XY Ltd. (10000012345)
 - Warenempfänger: Customer XY Ltd. (10000012345)
 - Ort: Dubai
 - Land oder Region: Vereinigte Arabische Emirate (AE)
 - Kundenreferenz: -
 - Nettowert: 85.000,00 AED
- Verkaufsdaten (Sales Data):**
 - Auftragsgrund: -
 - Grund für Genehmigungsanforderung: Level 5 - Item Margin Percentage (Z054)
 - Verkaufsorganisation: XY Middle East
 - Vertriebsweg: Sales (01)
 - Sparte: XY Sparte 01 (01)
 - Gültigkeitsbeginn: 23.11.2022
 - Gültigkeitsende: 21.02.2023
 - Margin %: 20.00-
 - RSP Adherence %: 0.00
 - Genehmigungsnotiz: -
- Verwaltungsdaten (Management Data):**
 - Angelegt von: Max Mustermann (MUSTERM)
 - Angelegt am: 23.11.2022
 - Zuletzt geändert von: Max Mustermann (MUSTERM)
 - Zuletzt geändert am: 23.11.2022, 14:04:42
- Positionen (2) Table:**

Position	Produkt	Auftragsmenge	Margin %	RSP Adherence %	Nettopreis	Nettowert
10	Produkt XY 1001148033	2,000 ST	-20,00	0,00	25.000,00	50.000,00 AED
20	Produkt XY 1001148030	1,000 ST	100,00	0,00	35.000,00	35.000,00 AED



EagleBurgmann Germany GmbH & Co. KG

- Industry: Supplier of various industries
- Product range: Industrial sealing technology such as mechanical seals and seal supply systems, magnetic couplings, carbon floating ring seals, expansion joints and flat gaskets, packings, special products and extensive services
- Sales: 858 million euros
- Employees: 5,800 in 86 countries
- Web: www.eagleburgmann.com
- Solution: SD release process
- Consulting partner: CONSILIO GmbH



WHAT DO INTELLIGENT AND ELEGANT SOLUTIONS HAVE IN COMMON? THEY ARE SIMPLE.

We'll be happy to find out together what that might look like in your case. **What do you want to optimize? >**