

Process case

Aproda Equipment and Tools Solution

Process flow chart

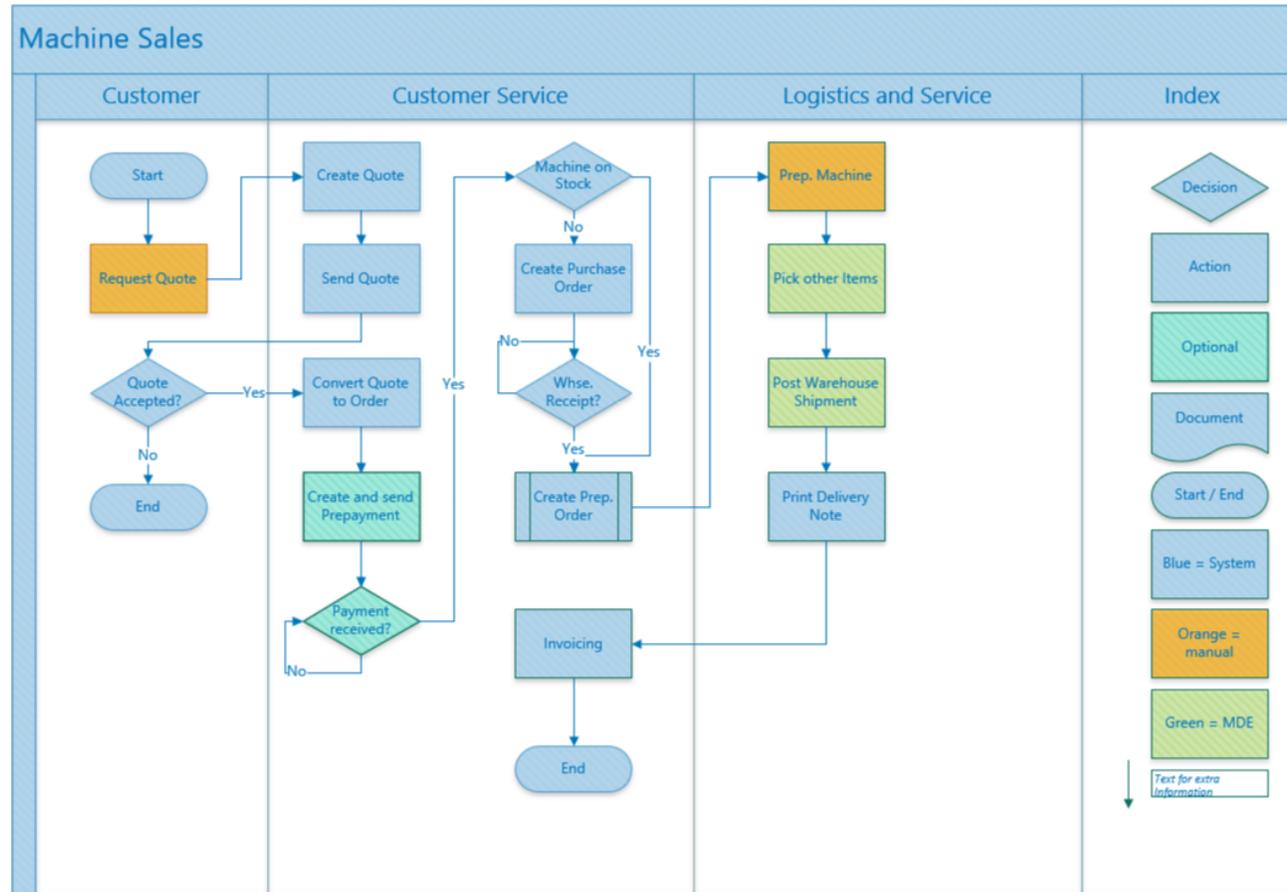


Figure: Machine sales workflow

Process steps explained

Quote Process

process step 1. Customer requests a quote

process step 2. Quote is entered in Business Central

1. Step: *in the role centre choose the required Business type and click on “new quote”*

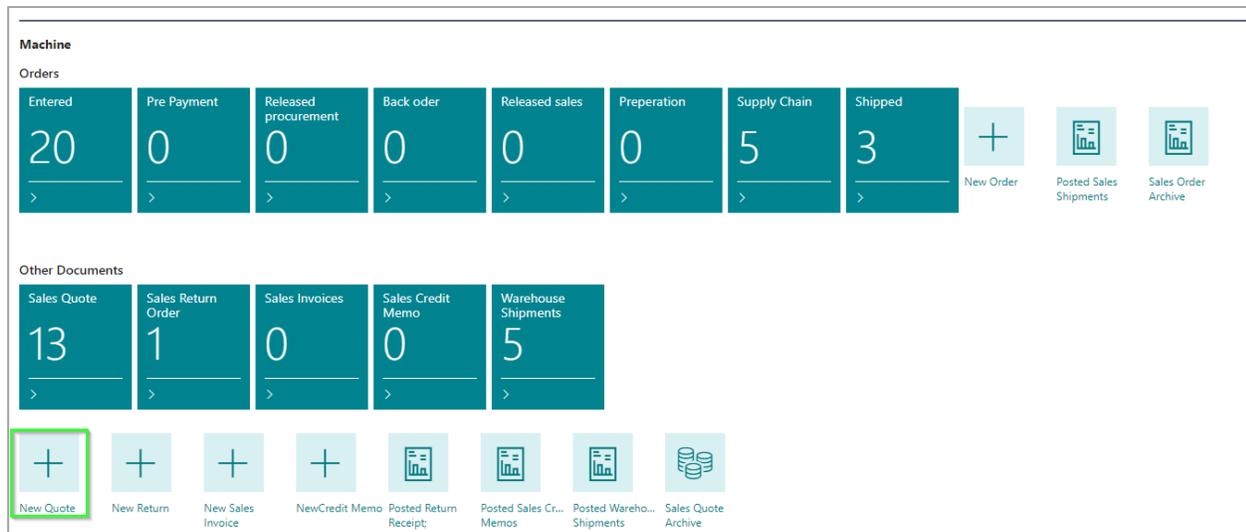


Figure: Role centre machine

Process steps explained

Quote Process

4. Step: Confirm the «create Quote-Machine» with yes

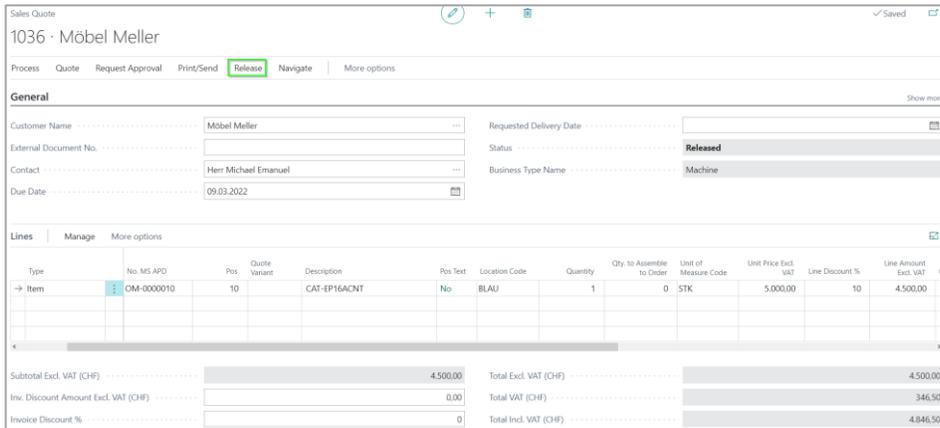


Confirmation dialog box titled "Create Quote-Machine?". It features a question mark icon and two buttons: "Yes" (highlighted with a green border) and "No".

Figure: confirmation

5. Step: Fill out the rest of the quote line

6. Step: Quote is ready press release



Screenshot of the SAP Sales Quote interface. The title bar shows "Sales Quote" and "1036 · Möbel Meller". The process navigation bar includes "Process", "Quote", "Request Approval", "Print/Send", "Release" (highlighted), "Navigate", and "More options". The "General" section contains fields for Customer Name (Möbel Meller), External Document No., Contact (Herr Michael Emanuel), Due Date (09.03.2022), Requested Delivery Date, Status (Released), and Business Type Name (Machine). The "Lines" section shows a table with one item:

Type	No. MS-APD	Pos	Quote Variant	Description	Pos Text	Location Code	Quantity	Qty. to Assemble to Order	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	C
→ Item	OM-000010	10		CAT-EP16ACNT	No	BLAU	1	0	STK	5,000.00	10	4,500.00	

Summary fields at the bottom:

Subtotal Excl. VAT (CHF)	4,500.00	Total Excl. VAT (CHF)	4,500.00
Inv. Discount Amount Excl. VAT (CHF)	0.00	Total VAT (CHF)	346.50
Invoice Discount %	0	Total Incl. VAT (CHF)	4,846.50

Figure: release quote

process steps explained

Quote Process

7. Step: *Press Print / Send to create a PDF and send it to the customer*

process step 3. Customer requests a quote

process step 4. Quote is entered in Business Central

process step 5. Process ends

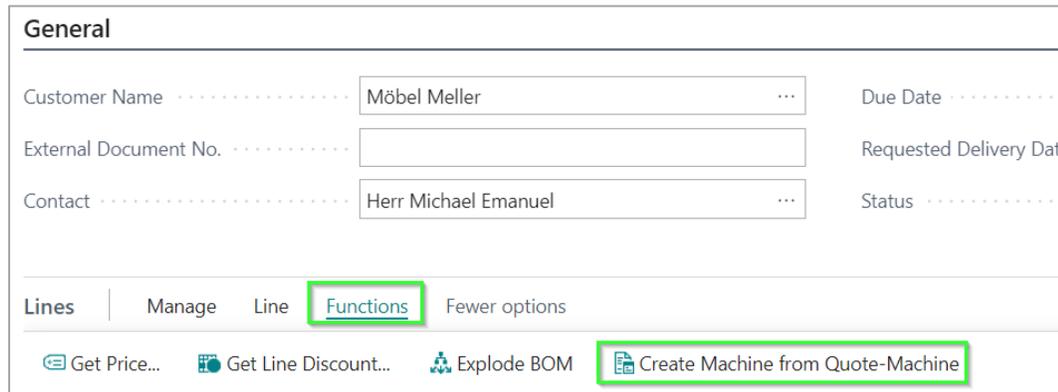
Process step 6. 3 = yes

process steps explained

Convert to Quote to Order

process step 7. convert quote into an order

1. Step. *Create machine from quote machine via functions*



General

Customer Name Möbel Meller ... Due Date

External Document No. Requested Delivery Date

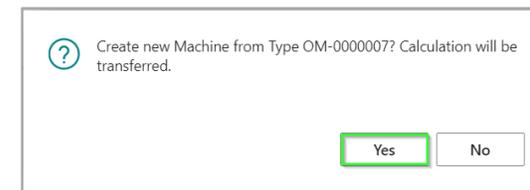
Contact Herr Michael Emanuel ... Status

Lines | Manage | Line | **Functions** | Fewer options

Get Price... Get Line Discount... Explode BOM **Create Machine from Quote-Machine**

Figure: Convert Quote Machine to Machine

2. Step. *Confirm with yes*



? Create new Machine from Type OM-0000007? Calculation will be transferred.

Yes No

Figure: Confirmation quote Machine

process steps explained

Convert to Quote to Order

3. Step. Via «Process», «Make Order» an order is created by the system

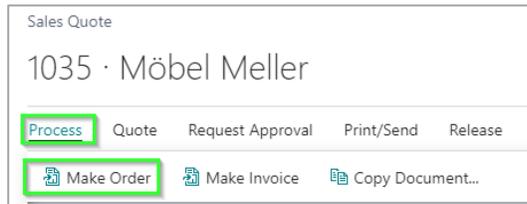


Figure: convert quote to order

4. Step. Press yes

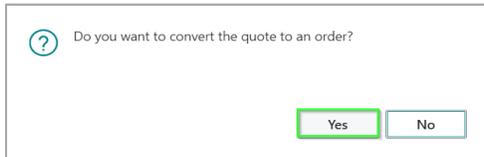


Figure: confirmation conversion

process steps explained

Convert to Quote to Order

5. Step. *Press yes*

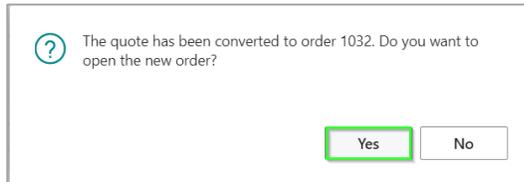


Figure: confirmation 2

6. Step. *Order is created fill out the required fields and press Release and Update stock Status*

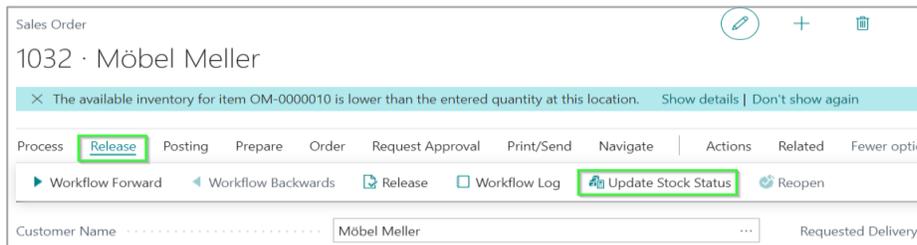
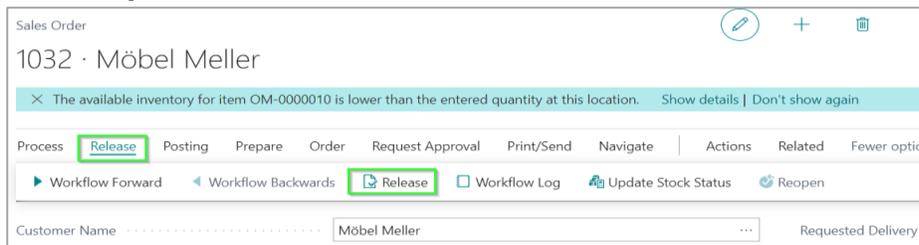


Figure: Update Stock Status

process steps explained

Convert to Quote to Order

7. Step. Now Press Release and Release



Sales Order
1032 · Möbel Meller

✕ The available inventory for item OM-0000010 is lower than the entered quantity at this location. Show details | Don't show again

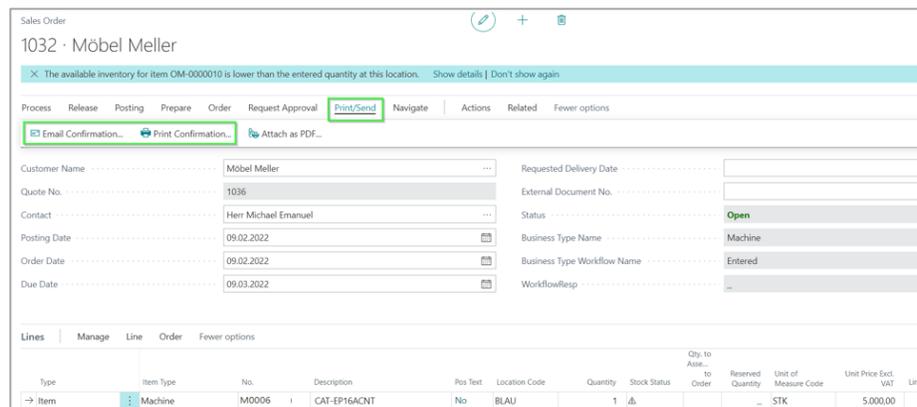
Process **Release** Posting Prepare Order Request Approval Print/Send Navigate Actions Related Fewer options

▶ Workflow Forward ◀ Workflow Backwards **Release** □ Workflow Log 🔄 Update Stock Status 🔄 Reopen

Customer Name Möbel Meller Requested Delivery

Figure: update stock status

8. Step. Send Order Confirmation via email or print



Sales Order
1032 · Möbel Meller

✕ The available inventory for item OM-0000010 is lower than the entered quantity at this location. Show details | Don't show again

Process Release Posting Prepare Order Request Approval **Print/Send** Navigate Actions Related Fewer options

✉ Email Confirmation... 🖨️ Print Confirmation... 📎 Attach as PDF...

Customer Name Möbel Meller Requested Delivery Date

Quote No. 1036 External Document No.

Contact Herr Michael Emanuel Status **Open**

Posting Date 09.02.2022 Business Type Name Machine

Order Date 09.02.2022 Business Type Workflow Name Entered

Due Date 09.03.2022 WorkflowResp

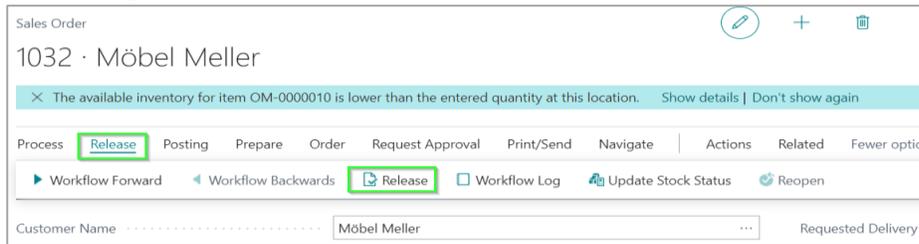
Lines	Manage	Line	Order	Fewer options								
Type	Item Type	No.	Description	Pos Text	Location Code	Quantity	Stock Status	Qty. to Allocate to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. VAT	Lin
→ Item	Machine	M0006	CAT-EP16ACNT	No	BLAU	1				STK	5,000,00	

Figure: send order confirmation

process steps explained

Convert to Quote to Order

7. Step. Now Press Release and Release



Sales Order
1032 · Möbel Meller

× The available inventory for item OM-000010 is lower than the entered quantity at this location. Show details | Don't show again

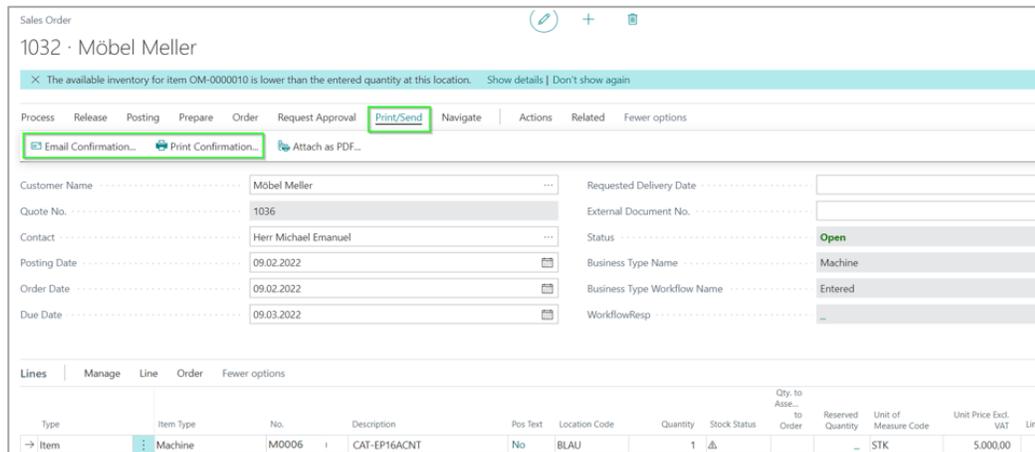
Process **Release** Posting Prepare Order Request Approval Print/Send Navigate Actions Related Fewer options

▶ Workflow Forward ◀ Workflow Backwards **Release** □ Workflow Log 🔄 Update Stock Status 🔄 Reopen

Customer Name Möbel Meller Requested Delivery

Figure: update stock status

8. Step. Send Order Confirmation via email or print



Sales Order
1032 · Möbel Meller

× The available inventory for item OM-000010 is lower than the entered quantity at this location. Show details | Don't show again

Process Release Posting Prepare Order Request Approval **Print/Send** Navigate Actions Related Fewer options

📧 Email Confirmation... 🖨️ Print Confirmation... 📎 Attach as PDF...

Customer Name Möbel Meller Requested Delivery Date
Quote No. 1036 External Document No.
Contact Herr Michael Emanuel Status **Open**
Posting Date 09.02.2022 Business Type Name Machine
Order Date 09.02.2022 Business Type Workflow Name Entered
Due Date 09.03.2022 WorkflowResp -

Lines | Manage | Line | Order | Fewer options

Type	Item Type	No.	Description	Pos Text	Location Code	Quantity	Stock Status	Qty. to Asse... to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. VAT	Lin
→ Item	Machine	M0006	CAT-EP16ACNT	No	BLAU	1				STK	5.000,00	

Figure: send order confirmation

process step 8. machine or inventory?
process step 9. 5 = n

process steps explained

Create Purchase Order and Purchase Receipt

process step 10. Create Purchase Order

1. Step: Click «Actions», «Function», «Create Purchase Documents», «Create Purchase orders»

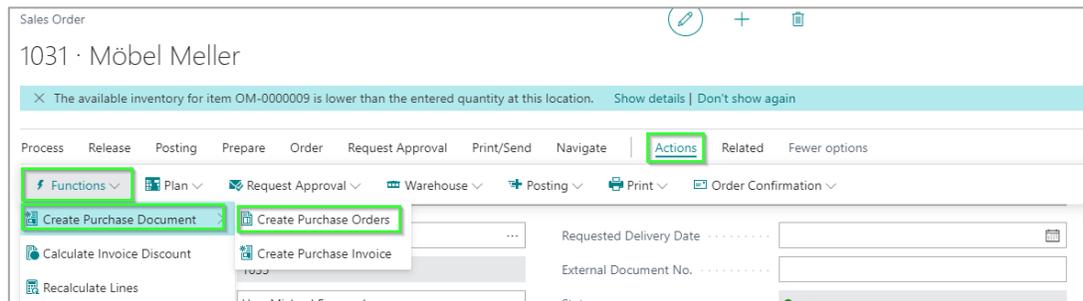


Figure: Create PO from SO

2. Step: Click OK to create the purchase order

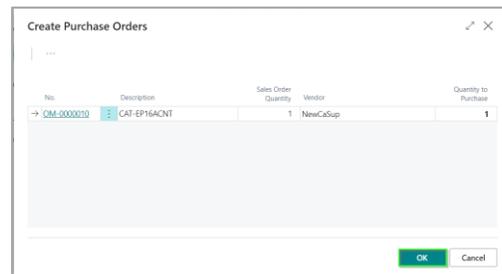


Figure: Confirm PO creation

process steps explained

Create Purchase Order and Purchase Receipt

3. Step: *Enter purchase price and release the purchase order*

Purchase Order
106057 · NewCaSup

Process: **Release** | Posting | Order | Request Approval | Print/Send | Navigate | Actions | Related | Fewer options

Release | Recopen

Vendor Name: NewCaSup | Document Date: 09.02.2022 | Vendor Shipment No.:
Contact: Mr. Toby Nixon | Vendor Invoice No.: * | Status: **Open**

Lines | Manage | More options

Type	Item Type	No.	Item belongs to	Serial No.	Description	Pos Text	Location Code	Bin Code	Quantity	Reserved Quantity	Unit of Measure Code	Direct Unit Cost Excl. VAT	Line Amount Excl. VAT	Qty. to Receive	Qty. Recd
→ Item	Machine	M0006			CAT-EP16ACNT	No	BLAU		1		STK	3,000.00	3,000.00		

Subtotal Excl. VAT (CAD) 3,000.00 | Invoice Discount % 0 | Total VAT (CAD) 0.00
Inv. Discount Amount (CAD) 0.00 | Total Excl. VAT (CAD) 3,000.00 | Total Incl. VAT (CAD) 3,000.00

Figure: PO

process step 11. is the machine delivered?

process step 12. 9 = no

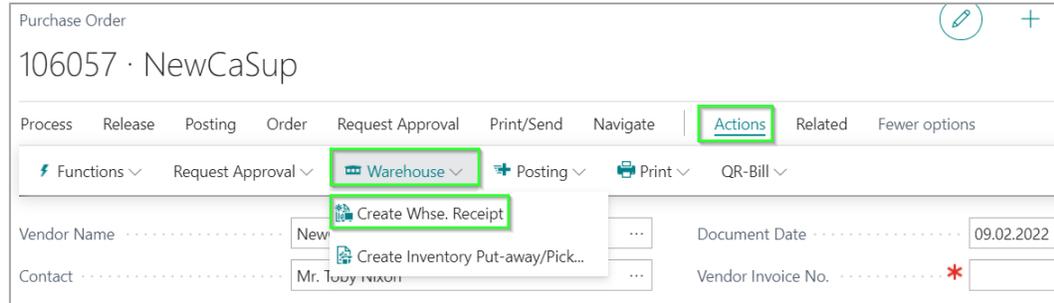
process step 13. back to step 9

process step 14. either 9 or 11 = yes

process steps explained

Create Purchase Order and Purchase Receipt

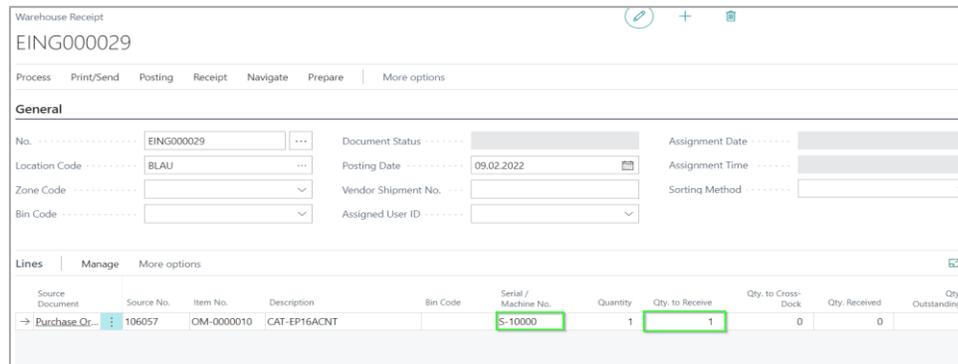
1. Step: Create Whse. Receipt via «Actions», «Warehouse», «Create Whse. Receipt»



The screenshot shows the SAP Purchase Order form for document 106057. The 'Actions' menu is open, and the 'Warehouse' dropdown is selected, showing the 'Create Whse. Receipt' option. Other fields include Vendor Name (New), Contact (Mr. Toby Nixon), and Document Date (09.02.2022).

Figure: Create Warehouse Receipt

2. Step: Fill out the serial number of the received machine and Qty. to Receive



The screenshot shows the SAP Warehouse Receipt form for document EING000029. The 'Lines' table contains one row with the following data:

Source Document	Source No.	Item No.	Description	Bin Code	Serial / Machine No.	Quantity	Qty. to Receive	Qty. to Cross-Dock	Qty. Received	Qty. Outstanding
→ Purchase Or-	106057	OM-000010	CAT-EP16ACNT		S-10000	1	1	0	0	1

Figure: Warehouse Receipt

process steps explained

Create Purchase Order and Purchase Receipt

3. Step: *Post Warehouse Receipt via «Posting», «Post Receipt»*

Source Document	Source No.	Item No.	Description	Bin Code	Serial / Machine No.	Quantity	Qty. to Receive	Qty. to Cross-Dock	Qty. Received	Qty. Outstanding
→ Purchase Or...	106057	OM-000010	CAT-EP16ACNT		S-10000	1	1	0	0	1

Figure: Post Warehouse Receipt

4. Step: *Confirm with Yes*

Do you want to post the receipt?

Yes No

Figure: Confirmation Warehouse receipt

5. Step: *Press OK*

Number of source documents posted: 1 out of a total of 1.

OK

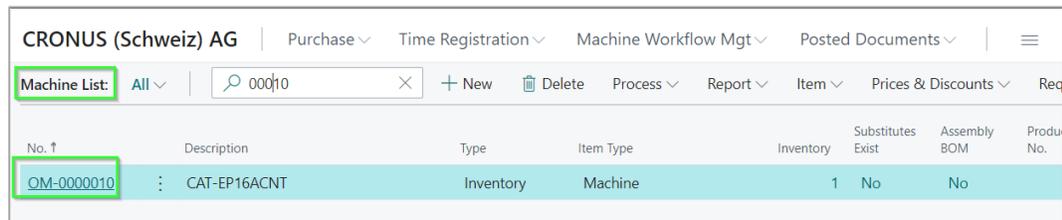
Figure: Confirmation Warehouse receipt 2

process steps explained

Create Preparation Order

process step 15. create a preparation order

1. Step: *Select machine in the machine list*

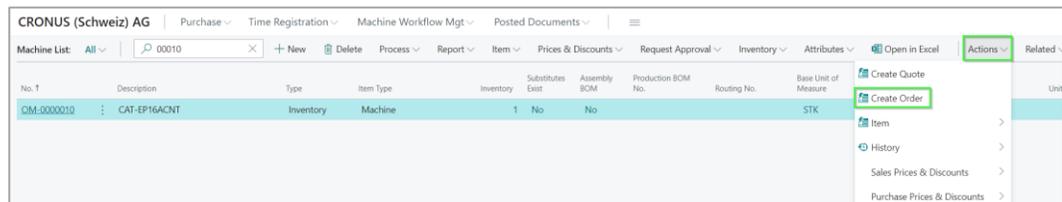


The screenshot shows the SAP Machine List interface. The search criteria are set to 'All' and '00010'. The table below shows the search results.

No. 1	Description	Type	Item Type	Inventory	Substitutes Exist	Assembly BOM	Production No.
OM-0000010	CAT-EP16ACNT	Inventory	Machine	1	No	No	

Figure: Machine list

2. Step: *click actions → create order*



The screenshot shows the SAP Machine List interface with the 'Actions' menu open. The 'Create Order' option is highlighted.

No. 1	Description	Type	Item Type	Inventory	Substitutes Exist	Assembly BOM	Production BOM No.	Routing No.	Base Unit of Measure	Unit
OM-0000010	CAT-EP16ACNT	Inventory	Machine	1	No	No			STK	

- Create Quote
- Create Order**
- Item
- History
- Sales Prices & Discounts
- Purchase Prices & Discounts

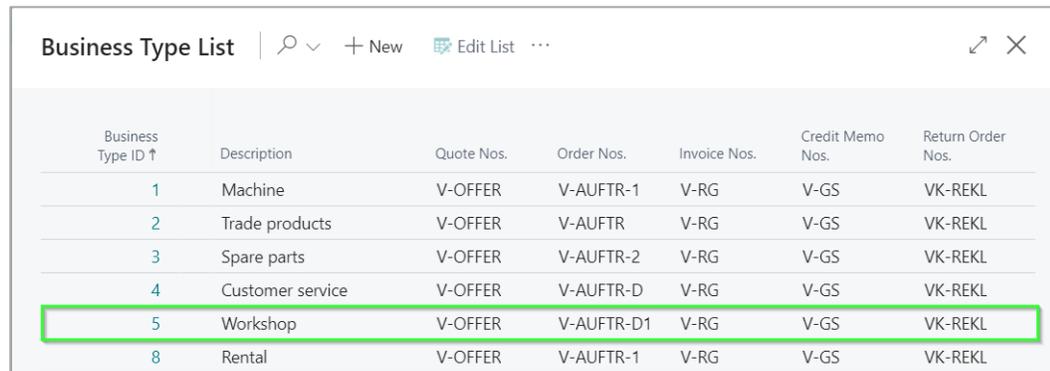
Figure: create preparation order

process steps explained

Create Preparation Order

process step 15. create a preparation order

3. Step: *select business type workshops*



Business Type List | 🔍 ⌵ + New 🛠 Edit List ⋮ ↗ ✕

Business Type ID ↑	Description	Quote Nos.	Order Nos.	Invoice Nos.	Credit Memo Nos.	Return Order Nos.
1	Machine	V-OFFER	V-AUFTR-1	V-RG	V-GS	VK-REKL
2	Trade products	V-OFFER	V-AUFTR	V-RG	V-GS	VK-REKL
3	Spare parts	V-OFFER	V-AUFTR-2	V-RG	V-GS	VK-REKL
4	Customer service	V-OFFER	V-AUFTR-D	V-RG	V-GS	VK-REKL
5	Workshop	V-OFFER	V-AUFTR-D1	V-RG	V-GS	VK-REKL
8	Rental	V-OFFER	V-AUFTR-1	V-RG	V-GS	VK-REKL

Figure: Select business types

4. Step: *Click OK*

process steps explained

Create Preparation Order

5. Step: *Fill out customer and machine fields*

The screenshot displays the SAP Preparation Order form. The 'General' section includes fields for Customer Name (Möbel Meller), Contact (Herr Michael Emanuel), Posting Date (11.02.2022), Order Date (11.02.2022), Due Date (11.03.2022), and Requested Delivery Date. The 'Machine Information' section includes Machine (M0019), Machine Description (CAT-EP16ACNT), and Time Registration details (Time Reg Hours, Chargeable Time Reg Hours, and Hours budgeted, all set to 0.00).

Figure: preparation order

6. Step: *Change the bill-to-customer to an internal customer no. the preparation order is for internal use*

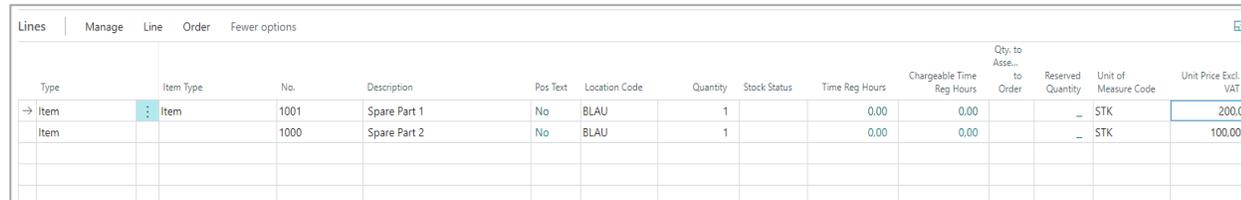
The screenshot displays the SAP Shipping and Billing form. The 'Bill-to' field is highlighted in green and set to 'INTERNAL'. Other fields include Ship-to (Default (Sell-to Address)), Contact (Herr Michael Emanuel), Location Code (2LAL), and Shipment Date (11.02.2022).

Figure: change customer on prep. order

process steps explained

Create Preparation Order

7. Step: *Add required spare parts to the preparation order*



Type	Item Type	No.	Description	Pos Text	Location Code	Quantity	Stock Status	Time Reg Hours	Chargeable Time Reg Hours	Qty. to Assgn. to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. VAT
→ Item	Item	1001	Spare Part 1	No	BLAU	1		0.00	0.00		-	STK	200.00
Item		1000	Spare Part 2	No	BLAU	1		0.00	0.00		-	STK	100.00

Figure: Change customer on Prep. Order

8. Step: *Move order to next step of the Workflow*

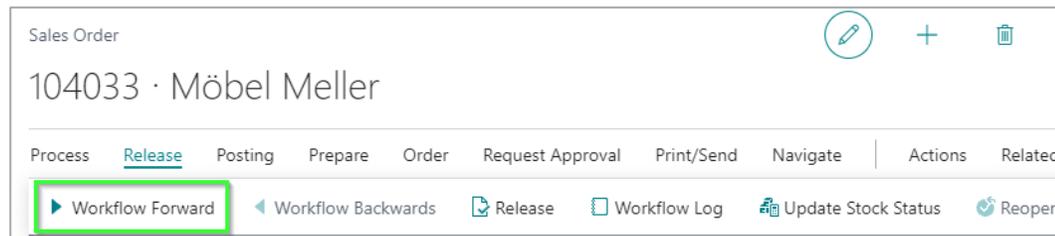


Figure: Workflow Forward

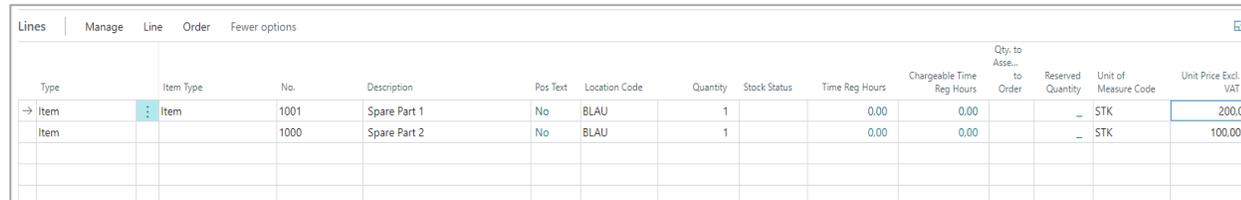
9. Step: *Add Work time to prep. order*

10. Step: *Role Center → Time Registration → Order Time Registration*

process steps explained

Create Preparation Order

7. Step: *Add required spare parts to the preparation order*



Type	Item Type	No.	Description	Pos Text	Location Code	Quantity	Stock Status	Time Reg Hours	Chargeable Time Reg Hours	Qty. to Assg. to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. VAT
→ Item	Item	1001	Spare Part 1	No	BLAU	1		0.00	0.00		-	STK	200.00
Item		1000	Spare Part 2	No	BLAU	1		0.00	0.00		-	STK	100.00

Figure: Change customer on Prep. Order

8. Step: *Move order to next step of the Workflow*

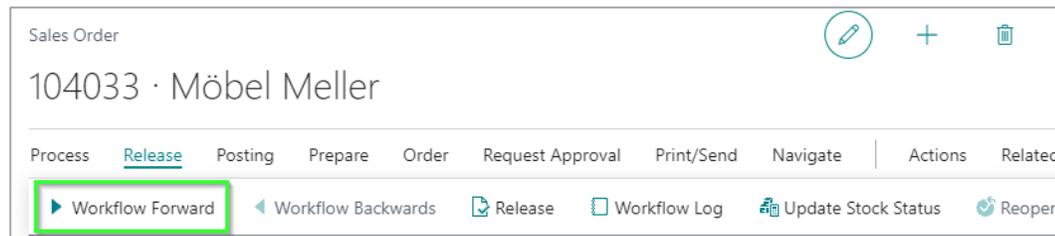


Figure: Workflow Forward

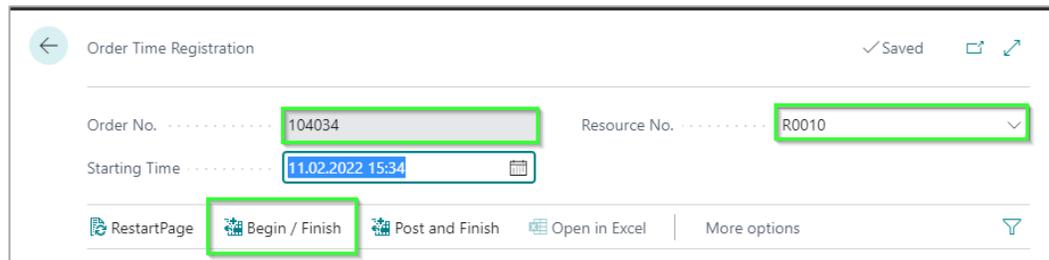
9. Step: *Add Work time to prep. order*

10. Step: *Role Center → Time Registration → Order Time Registration*

process steps explained

Create Preparation Order

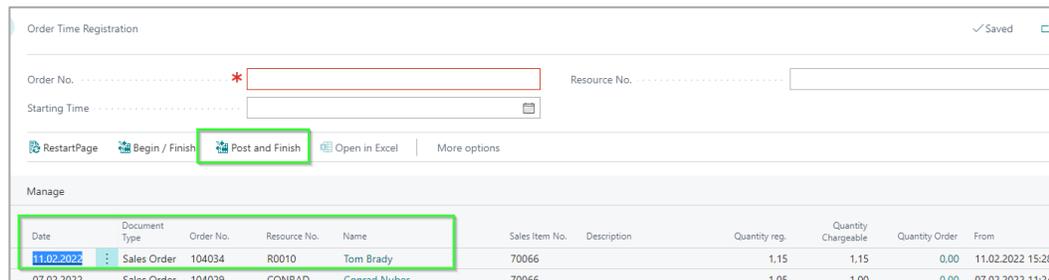
11. Step: Add Sales Order No & Resource No. and press Begin / Finish



The screenshot shows the 'Order Time Registration' form. The 'Order No.' field contains '104034' and the 'Resource No.' dropdown is set to 'R0010'. The 'Starting Time' is '11.02.2022 15:34'. The 'Begin / Finish' button is highlighted with a green box.

Figure: Order time Registration

12. Step: Finish work by clicking Post and Finish



The screenshot shows the 'Order Time Registration' form with the 'Post and Finish' button highlighted. Below the form is a table with the following data:

Date	Document Type	Order No.	Resource No.	Name	Sales Item No.	Description	Quantity reg.	Quantity Chargeable	Quantity Order	From
11.02.2022	Sales Order	104034	R0010	Tom Brady	70066		1,15	1,15	0,00	11.02.2022 15:28
07.02.2022	Sales Order	104029	COMRAD	Conrad Nuber	70066		1,05	1,00	0,00	07.02.2022 11:24

Figure: Finish time registration

process steps explained

Create Preparation Order

13. Step: Create line on order: Open the order and click assist button

Machine Information		Time Registration	
Machine	M0019	Time Reg Hours	1.15
Machine Description	CAT-EP16ACNT	Chargeable Time Reg Hours	1.15
Supplementary Part	<input type="checkbox"/>	Hours budgeted	0.00
Component for Repair	0		
Technician	R0010		

Figure: Assist Button

Type	Item Type	No.	Description	Plat.	Location	Stock	Quantity	Time Reg. Hours	Chargeable Time Reg. Hours	Qty. to Asse...
Item		70056	Service item for time registration	No			1.15	1.15	1.15	
Item		1001	Spare Part 1	No	BLAU		1	0.00	0.00	
Item		1000	Spare Part 2	No	BLAU		1	0.00	0.00	

Figure: Registered time on Sales Order

process step 16. Pick remaining items & post preparation order

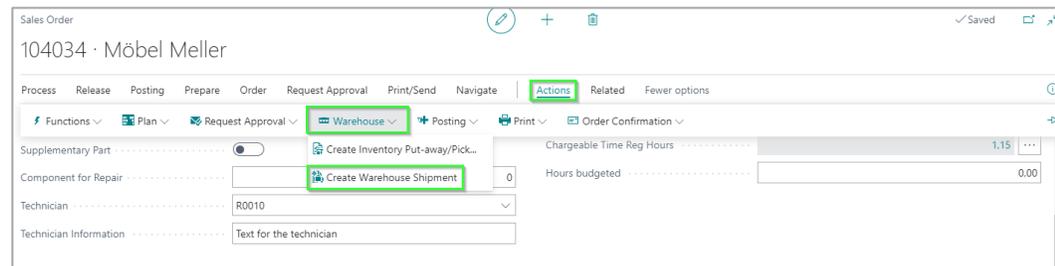
process step 17. Post warehouse shipment of the machine order

process steps explained

Create Preparation Order

process step 17. Post warehouse shipment of the machine order

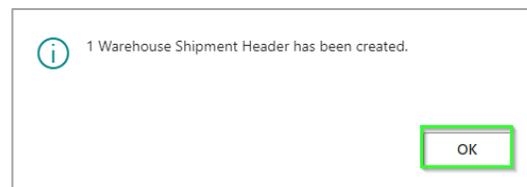
1. Step: *Actions → Warehouse → Create Warehouse Shipment*



The screenshot shows the SAP Sales Order interface for order 104034 - Möbel Meller. The 'Actions' menu is open, and the 'Warehouse' sub-menu is selected. Within the 'Warehouse' menu, the 'Create Warehouse Shipment' option is highlighted with a green box. Other visible fields include 'Supplementary Part', 'Component for Repair', 'Technician' (R0010), and 'Technician Information'.

Figure: Create warehouse shipment

2. Step: *Press OK*



The screenshot shows a confirmation dialog box with an information icon (i) and the text '1 Warehouse Shipment Header has been created.' Below the text is an 'OK' button, which is highlighted with a green box.

Figure: Confirmation

process steps explained

Create Preparation Order

3. Step: *Post Warehouse Shipment*

Warehouse Shipment ✎ + 🗑 ✓ Saved 🔖

AUSG000031

Process | Print/Send | Release | **Posting** | Shipment | Navigate | Actions | Related | Fewer options

General

No. AUSG000031 ... Assigned User ID
Location Code BLAU ... Assignment Date
Zone Code Assignment Time
Bin Code Sorting Method
Document Status Business Type Name Workshop
Status Open Service Sales Order
Posting Date 11.02.2022

Lines | Manage | More options 🔗

Source Document	Source No.	Item No.	Description	Serial / Machine No.	Quantity	Qty. to Ship	Qty. Shipped	Qty. Outstanding	Due Date
→ Sales Order	104034	1001	Spare Part 1		1	1	0	1	11.02.2022
Sales Order	104034	1000	Spare Part 2		1	1	0	1	11.02.2022

process steps explained

Create Preparation Order

4. Step: Check the serial number

Warehouse Shipment ✎ + 🗑 ✓ Saved 🗨

AUSG000032

Process | Print/Send | Release | Posting | Shipment | Navigate | Actions | Related | Fewer options

General

No. AUSG000032 ⋮ Assigned User ID ▼

Location Code BLAU ⋮ Assignment Date 🗓

Zone Code ▼ Assignment Time 🕒

Bin Code ▼ Sorting Method ▼

Document Status 🔒 Business Type Name Machine 🔒

Status Open 🔒 Service Sales Order 🔍

Posting Date 11.02.2022 🗓

Lines | Manage | More options 🗨

Source Document	Source No.	Item No.	Description	Serial / Machine No.	Quantity	Qty. to Ship	Qty. Shipped	Qty. Outstanding	Due Date
→ Sales Order	1035	M0019	CAT-EP16ACNT	S-00001	1	1	0	1	11.02.2022

Figure: Machine Warehouse Shipment

process steps explained

Create Preparation Order

5. Step: *Post Warehouse Shipment*

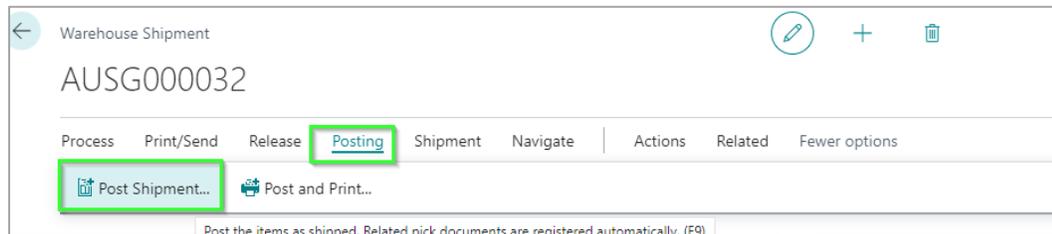


Figure: Post Warehouse Shipment

process steps explained

Create Preparation Order

process step 18. Print Delivery Note

1. Step: *Open Posted Shipment*

Sales Order 1035 · Möbel Meller

Process Release Posting Prepare Order Request Approval Print/Send Navigate Actions **Related** Fewer options

Order Documents Warehouse Prepayment History

Shipments

Customer Name: Möbel Meller
Quote No.: 1049
Contact: Herr Michael Emanuel
Posting Date: 11.02.2022
Order Date: 11.02.2022
Due Date: 11.03.2022

Requested Delivery Date:
External Document No.:
Status: **Released**
Business Type Name: Machine
Business Type Workflow Name: Shipped
WorkflowResp: -

Type	Item Type	No.	Description	Pos Text	Location Code	Quantity	Stock Status	Qty. to Asse... to Order	Reserved Quantity	Unit of Measure Code
Item	Machine	M0019	CAT-EP16ACNT	No	BLAU	1	●			STK

Figure: Open Shipment

2. Step: *Open Posted Shipment*

Posted Sales Shipments

Search Manage Process **Print/Send** Shipment Open in Excel More options

Print...

102052	10000	Möbel Meller	BLAU	0
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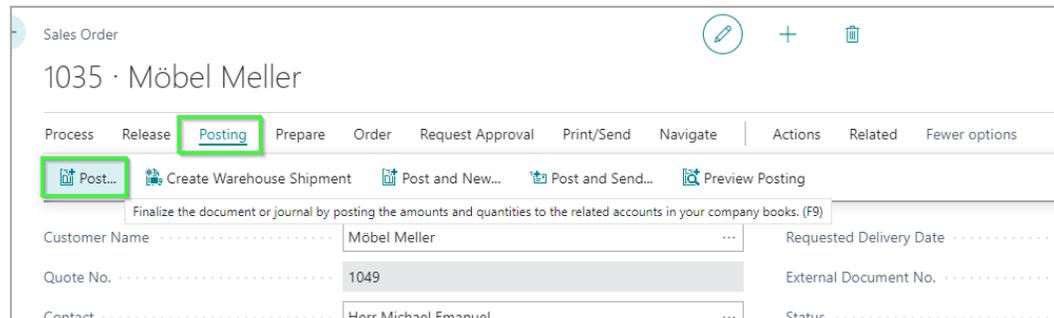
Figure: Print Delivery Note

process steps explained

Create Preparation Order

process step 19. Invoice Sales order

1. Step: *Post the Sales Order*



Sales Order

1035 · Möbel Meller

Process Release **Posting** Prepare Order Request Approval Print/Send Navigate Actions Related Fewer options

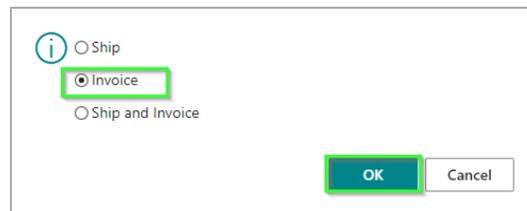
Post... Create Warehouse Shipment Post and New... Post and Send... Preview Posting

Finalize the document or journal by posting the amounts and quantities to the related accounts in your company books. (F9)

Customer Name	Möbel Meller	Requested Delivery Date
Quote No.	1049	External Document No.
Contact	Herr Michael Emanuel	Status

Figure: Post Sales Order

2. Step: *Select invoice and press OK*



Ship

Invoice

Ship and Invoice

OK Cancel

Figure: Confirm Invoicing

process step 20. End