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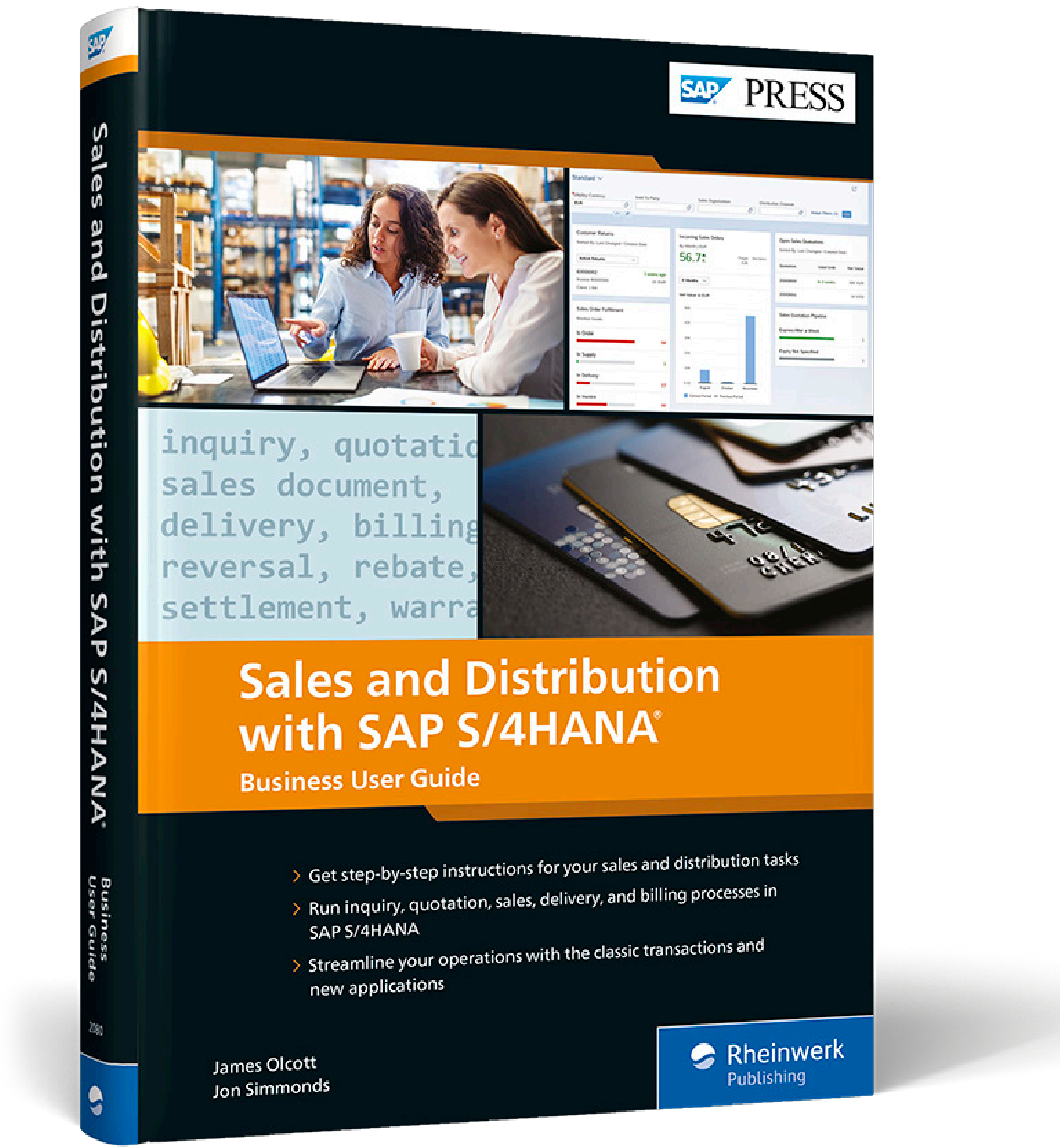

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In this sample chapter, get step-by-step instructions for handling sales inquiry documents in SAP S/4HANA, with special attention paid to the various inquiry document types and key header and line item fields.

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Chapter 4
Presales Inquiries

This chapter introduces the initial document of the sales and distribution order-to-cash flow: the inquiry.

4

In this chapter, you'll get step-by-step instructions on how to create an inquiry document, with particular focus on the header and line-item sections of the screen where you'll find all critical fields for entry. We'll introduce the incompletion log and show you how to print your inquiry document as an output. After saving, we'll review the commands for changing and displaying your new document. We'll cover how to perform these functions in SAP Fiori and then close the chapter with searching for existing inquiries in SAP S/4HANA.

4.1 Process Overview

Your business is always soliciting additional orders from either brand-new customers or existing ones who buy limited ranges of products. The inquiry document process chronicles a casual nonbinding inquiry to a customer for the potential purchase of one or more of your products within a date range designed to elicit the next step—a fully legally binding quotation. Of course, your customer could also just simply accept outright the inquiry and send you their purchase order to buy the product at the indicated price.

In both cases, you'll be able to create the follow-on quotation or sales document using the inquiry document as a template to fill in fields such as **Customer**, **Material**, **Quantity**, and **Price**.

In this regard, SAP ERP also offers a very robust presales process as part of their SAP Customer Relationship Management (SAP CRM) package, which can be configured to flow into the SAP S/4HANA order-to-cash process.

As the subject in this book is limited to SAP S/4HANA, we leave the SAP CRM package by the wayside and start our sales and distribution order-to-cash process with two presales processes, which are part and parcel of SAP S/4HANA:

- **Inquiry**
  This nonbinding document is issued to a potential customer with respect to an identified interest in one of your products at a specified quantity and price.

- **Quotation**
  Potential customers who respond favorably to the inquiry may request a binding quote on the indicated product for a specific quantity and price. This quotation document will also have an expiration date regarding the promised quantity and price terms. This document may be created as a copy of the initial inquiry or as a fresh document with all the inputs made directly into all required fields.

This chapter focuses on the inquiry process, which is covered in the highlighted section of the flowchart in Figure 4.1.

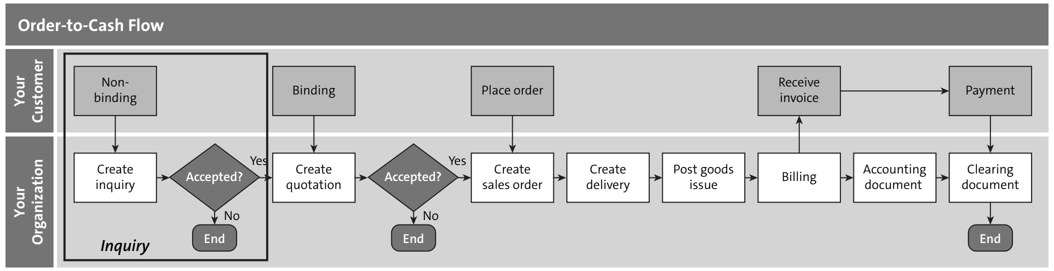


Figure 4.1 Order-to-Cash Flow: Inquiries

4.2 Document Types

The order-to-cash process is preconfigured to use the following basic document types from inquiry through billing:

- IN: Inquiry
- QT: Quotation
- OR: Standard order
- RE: Returns order
- CR: Credit memo request
- DR: Debit memo request
- LF: Outbound delivery document
- LR: Returns delivery
- F1: Sales invoice for an order
- F2: Sales invoice for a delivery
- G2: Credit memo
- L2: Debit Memo

These documents control how SAP S/4HANA will process information input by the user (or input via interface) in terms of an inquiry, quotation, sale, delivery, and so on. This means that certain documents will require specific field data and others won't. For

example, inquiries, quotations, sales, and billing documents will require pricing information, but deliveries do not because they are concerned with other details related to shipping.

It's common in any SAP system to keep document templates untouched in the configuration for potential future use. For example, the default OR (normal sales) document type is typically kept clean as a reusable layout and is simply copied over repeatedly as the basis for creating new customized ZOR types, that is, order types that will be used for your business's most frequently used sales order process, incorporating whatever changes are necessary. Your company may have two or more such "standard" sales processes that use different pricing procedures. Accordingly, it's common to see multiple sales document types, such as ZOR1, ZOR2, and so on, assigned to pricing procedures ZVA001, ZVA002, and so on, respectively. SAP provides such inherent flexibility and robustness in accommodating your desired business processes.

Note that the preceding list of documents is by no means exhaustive but is provided at this point for illustrative purposes. For example, the sales and distribution process also includes many other document types such as contract documents, intercompany billings, and so on. These will be discussed in more detail in the coming chapters.

4.3 Create an Inquiry Document

In this section, we'll create an inquiry document. To do so, follow these steps:

1. Enter Transaction code VA11, as shown in Figure 4.2.

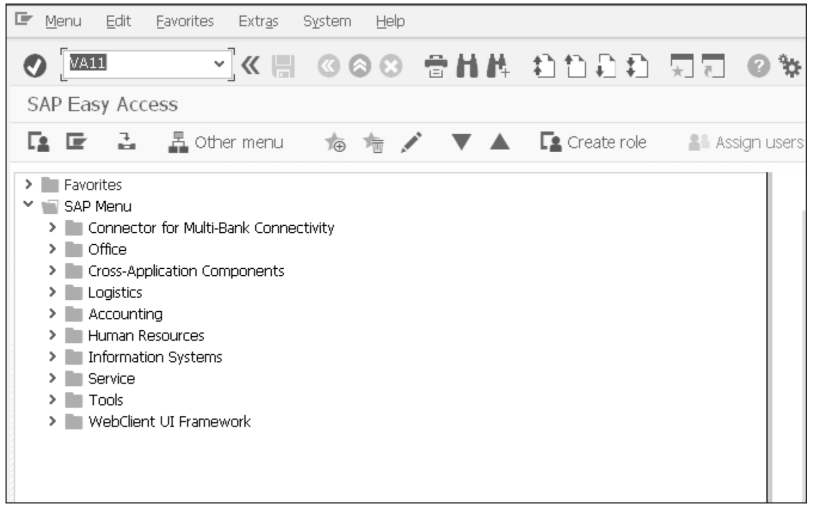


Figure 4.2 SAP Easy Access Menu: Transaction Code Field

2. In the **Inquiry Type** field, enter "IN", which is the standard document type for inquiries.

3. Now enter your organizational data (see Chapter 2, Section 2.2.1 , for more details on organizational data), as shown in Figure 4.3:
   – **Sales Organization**: “US30”
   – **Distribution Channel**: “20”
   – **Division**: “10”

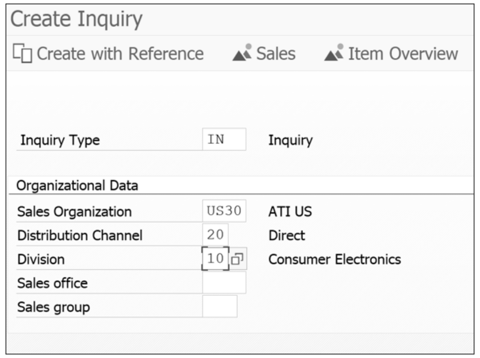


Figure 4.3 Create Inquiry Initial Screen

4. Press Enter.

You’re now in the main **Create Inquiry** screen and need to enter some basic header data here to be able to proceed. Header data will apply to all items in your inquiry. For example, your inquiry document can be for one and only one customer. Multiple inquiries to multiple customers will require separate inquiry documents. Therefore, your inquiry document number is an example of header data.

4.3.1 Header Data

To get started, you’ll need to specify your customer or business partner information in the form of sold-to party and ship-to party. Additional business partner functions are available as well, namely bill-to party and payer. To understand the relationships of these functions, let’s explore some basic definitions (see Chapter 2, Section 2.2.1, for more comprehensive details):

- **Sold-to party**
  This is the customer entity who is requesting the inquiry from you and who receives any confirmation output from the inquiry.
- **Ship-to party**
  This is the customer entity who will receive the products if and when an order is placed. Your customer may have several locations for receiving goods; the right address for receipt is designated here.
- **Bill-to party**
  This is the customer entity who will be the recipient of the invoice after a sales order

  is generated and goods issued. Again, your customer may have several entities that receive invoices.
- **Payer**
  This is the customer entity who will be responsible for paying the invoice (accounts payable from their point of view). As with the other partner functions listed here, your invoice may be paid by any number of paying entities or offices as designated by your customer. It’s a good thing for your business to have such wealthy customers!

It’s important to note that these partners can be, and often are, the same; SAP S/4HANA is simply giving you the flexibility to split out the functions as needed to meet the demands of our complex world. Only the sold-to party and ship-to party are available on the overview page of the **Create Inquiry** screen. Adding your customer number into either the **Sold-To Party** or the **Ship-To Party** fields, causes the system to derive all the other partner functions automatically because the sold-to party is the lead function. If more than one partner is available from the customer master data for the ship-to party, bill-to party, or payer, then the system will offer up a popup box for you to select the right one.

For simplicity’s sake, all four partner functions will be the same in this manual unless otherwise noted. When you input the **Sold-To Party** and **Ship-To Party** numbers, the system automatically inputs the same numbers for the **Bill-To Party** and **Payer** in the document’s **Partners** tab.

Including these customer fields, now input the following header fields (see Figure 4.4), followed by pressing Enter:

- **Sold-to Party**: “92”
- **Ship-to Party**: “92”
- (optional) **Cust. Reference**: “AUG182020F”
- **Valid From**: “08/18/2020”
- **Valid To**: “08/31/2020”

The **Cust. Reference** field refers to any number issued by the customer for its own tracking of the inquiry. In the sales document to follow (assuming that the inquiry and follow-on quotation documents are accepted), this field will be the customer’s purchase order number. This field isn’t system required. Because the field is frequently business required, however, it’s included here as an optional field.

An inquiry is intended to be valid for only a specified period of time so that pricing can be correctly calculated. For example, you may have a different price in the system to use on September 1, 2020, and afterwards. If the validity dates are left blank, the system will return a price of zero, which severely limits the utility of your proposed inquiry document.

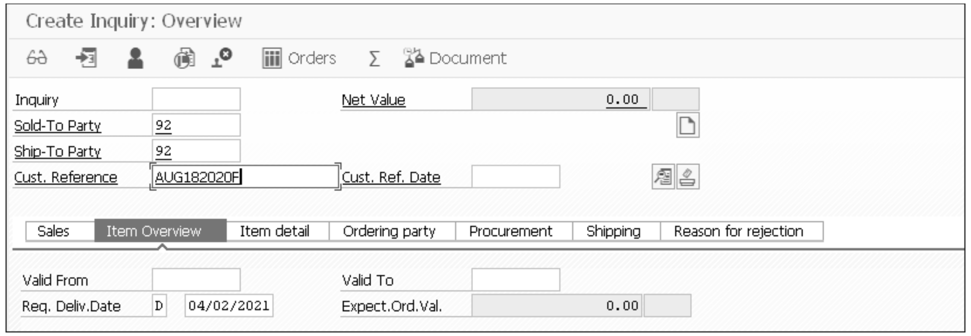


Figure 4.4 Entering Header Data in the Create Inquiry: Overview Screen

Note that the **Req. Delivery Date** field defaults to the current date (although this can be customized as needed). This is the date that the goods are to be delivered to the customer and is often changed from the current date to several days in the future to reflect a reasonable delivery time. This is a header data field and copies into the **Delivery Date** field in the **Schedule Lines** tab of the material line item where it can be changed. If changed at the line-item level, that date overrides the header date in terms of delivery planning (and the header date, interestingly, remains unchanged).

4.3.2 Line-Item Data

All required header fields have now been input. Now, input the following line-item fields:

- **Material**: "252"
- **Order Quantity**: "10"

The **Create Inquiry: Overview** screen should now look like Figure 4.5.

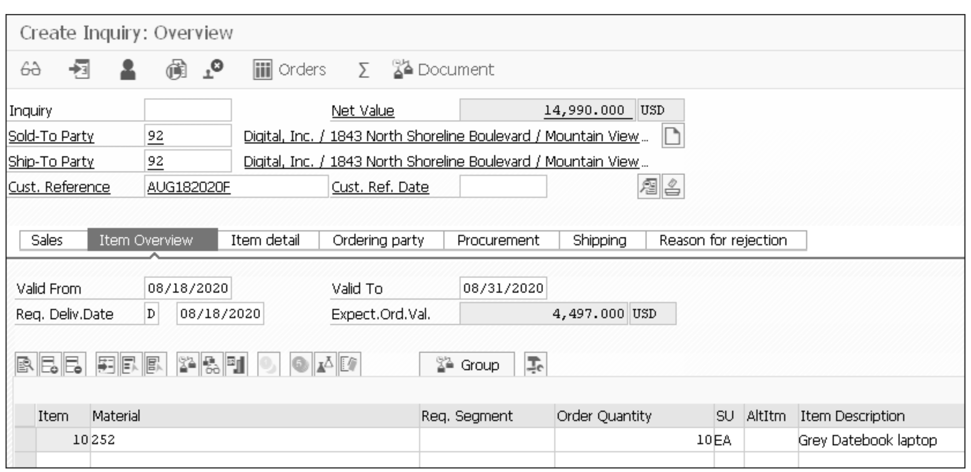


Figure 4.5 Entering Line-Item Data in the Create Inquiry: Overview Screen

At this point, your customer details, customer reference number, validity dates, material, and quantity as input and price as determined are clearly visible in both the header and line-item sections. This is all that is required to complete an inquiry.

4.3.3 Other Header and Line-Item Data

Along with the fields already mentioned in the header and line-item sections, there are some other commonly used optional or business-required fields to be aware of, as discussed in this section.

Header Data

The header data section contains many additional fields, which will potentially have repercussions on the price and availability information you provide to your customer. Remember, depending on the setup of your system, inquiry documents may generate output documents that are sent to your customer automatically, and you need to be sure that the information contained therein is accurate.

Some of these header fields are visible in the **Sales** tab of the **Create Inquiry: Overview** screen as shown in Figure 4.6:

- **Pyt Terms**
  What are the payment conditions under which your customer will be trading with you? This can be defined in the customer master data and then copied automatically into all sales and distribution documents.
- **Incoterms**
  Who will have responsibility for the shipments at which phase in the process? This can also be defined in the customer master data.
- **Doc. Currency**
  Is the currency correct? Again, this can also be set up once in the customer master data.

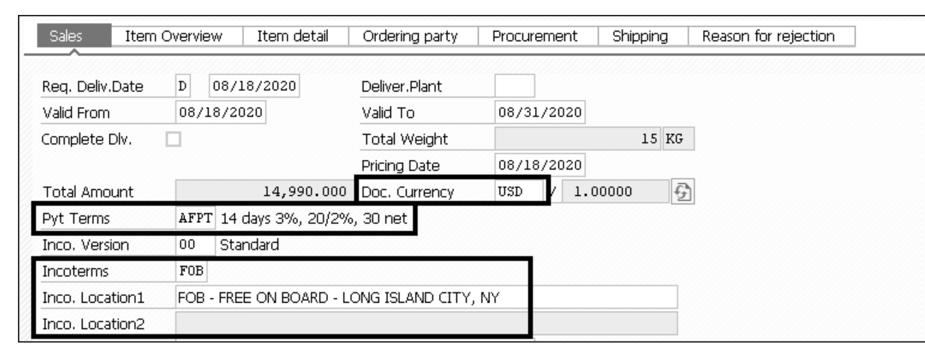


Figure 4.6 Create Inquiry: Sales Tab Fields

By clicking on the **Header** button in Figure 4.7, you can open all the header data for the inquiry.

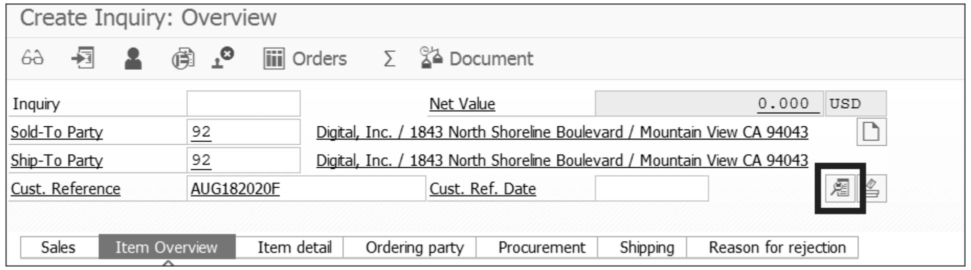


Figure 4.7 Create Inquiry: Header Button

From here, all header information is shown in various tabs, including more detailed information, such as the following:

- **Shp.Cond. (shipping condition)**
  If the customer has requested a specific shipping condition (e.g., must be delivered as a rush) or wants to pick up the products, this may have an impact on your freight price determination. This field is found on the **Shipping** tab, as shown in Figure 4.8. This can be set in the customer's master data.

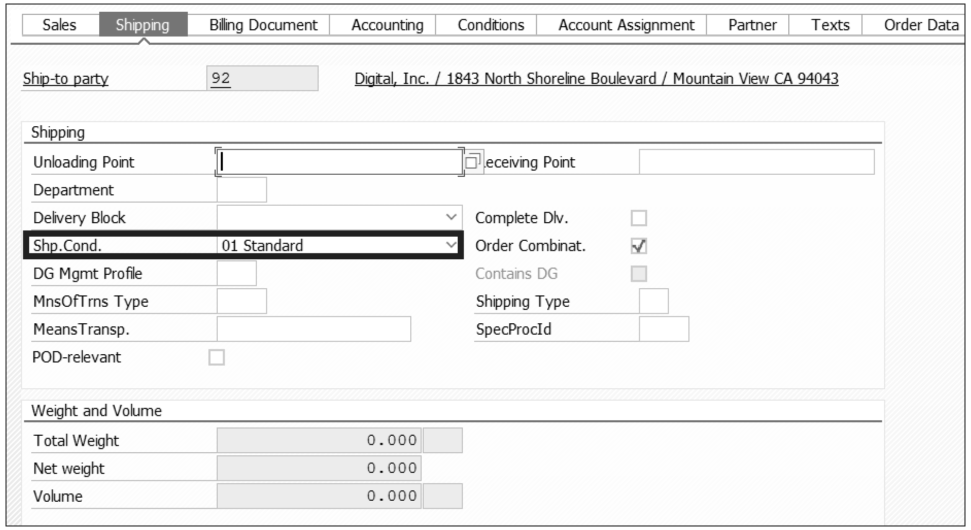


Figure 4.8 Create Inquiry: Shipping Tab

- **Partn. Funct. (partner functions)**
  If you need to change any of the partner functions, such as the bill-to party or the payer, or you want to add a new partner function for a carrier or an end customer, for example, this can be done in the **Partner** tab, as shown in Figure 4.9.

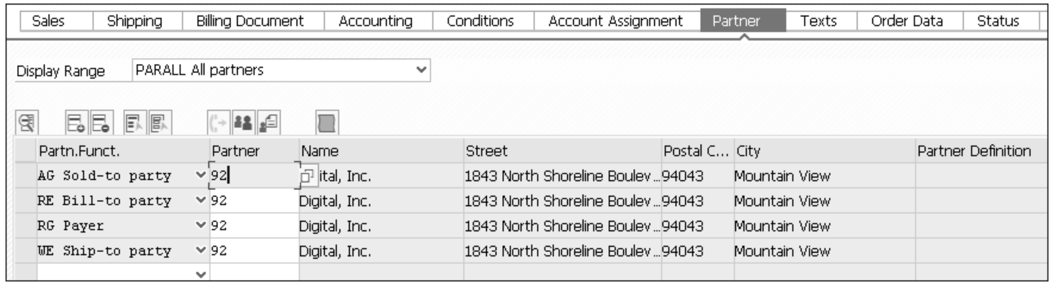


Figure 4.9 Create Inquiry: Partner Tab

- **Txt ty.**
  Are there any specific header texts you want to add to the document? This means that this particular text is applicable to *all* items in the order. Depending on your setup in the system, these can be included in the output document for the customer. These texts can be added in the **Texts** tab, as shown in Figure 4.10.

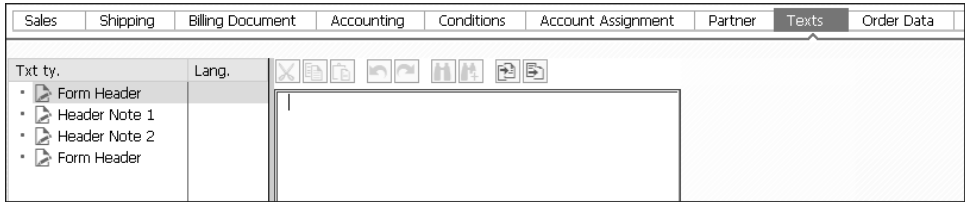


Figure 4.10 Create Inquiry: Texts Tab

Line-Item Data

By double-clicking the line items, you can open up the item data per material line in the inquiry document. Item data therefore can vary from line item to line item. The key data for an inquiry line item is the material unit price in the **Conditions** tab. (More information on pricing is available in Chapter 2, Section 2.2.3.) The following line-item fields are found in various tabs:

- **Price**
  Check that prices are correct. Do you need to add any discounts or customer-specific pricing, surcharges, or freight? All these options are available by adding new or changing existing condition types in the **Conditions** tab shown in Figure 4.11.

- **Batch**
  If the material is batch managed, has the customer requested price and availability of a specific batch? If so, this can be added in the **Sales A** tab, as shown in Figure 4.12. Note that the **Batch** field won't show if the material isn't batch managed.

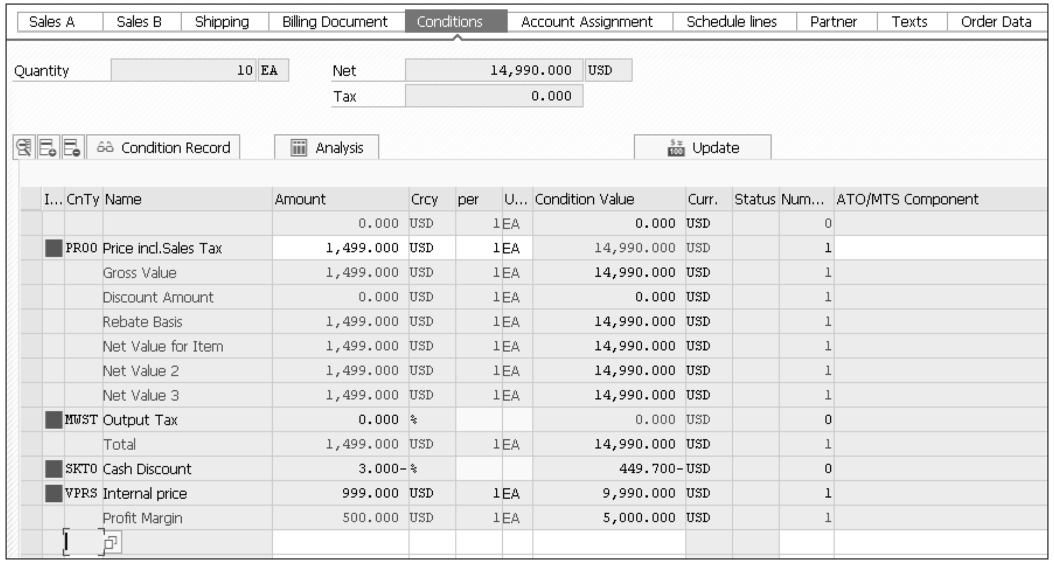


Figure 4.11 Create Inquiry: Conditions Tab

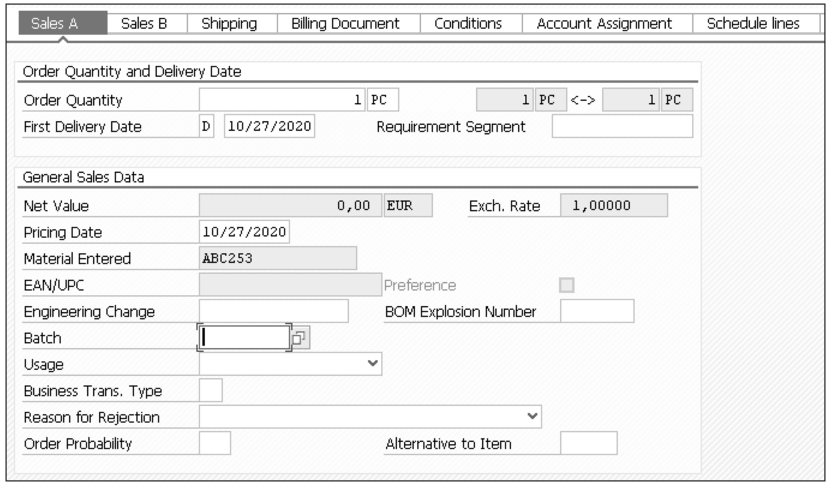


Figure 4.12 Create Inquiry: Batch Field

- **Delivery DATE**
  Has the customer requested an inquiry for delivery of products to be scheduled across multiple future dates? These dates can be changed and added in the **Schedule lines** tab, as shown in Figure 4.13. As noted previously, this line-item delivery date overrides, but doesn't change, the **Req. Delivery Date** in the header. This allows for an order of 10 pieces, for example, to be split into two (or more) schedule lines by the delivery due date. For example, 8 units can be delivered on one date and the other 2 a week later (for a total of 10).

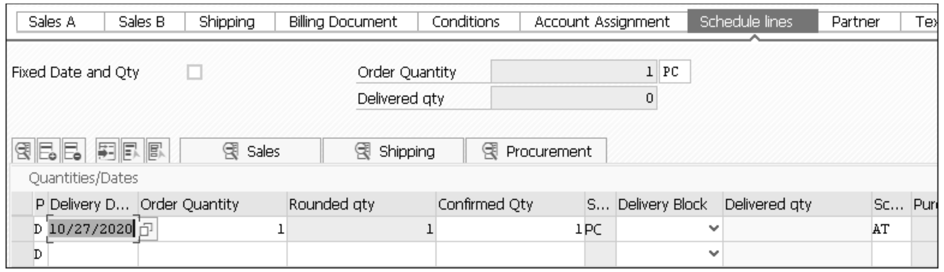


Figure 4.13 Create Inquiry: Schedule Lines Tab

- **Txt ty.**
  Are there any specific item texts you want to add to the document line item? Remember, header text applies to the entire order and all line items. Line-item text is specific only to the particular inquiry line item. For example, if one material in the inquiry needs to be kept at a special temperature, that information could be provided as text here. Depending on your setup in the system, these can be included automatically in the output document for the customer. These texts can be reviewed or added in the line-item **Texts** tab, as shown in Figure 4.14.

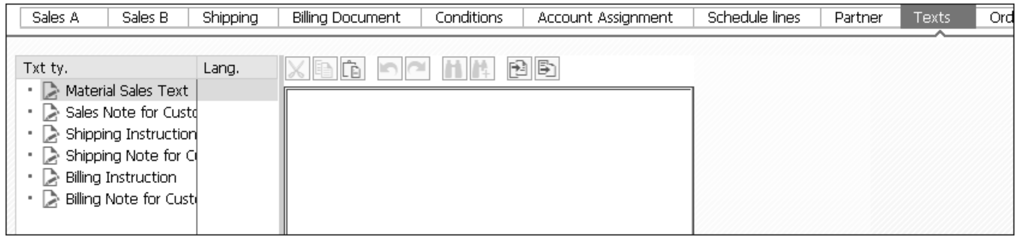


Figure 4.14 Create Inquiry: Texts Tab

4.3.4 Incompletion Log

The inquiry document is now complete for all required and many other commonly used fields. To check the incompletion status, choose **Edit • Incompletion Log**, as shown in Figure 4.15.

This launches the incompletion procedure, which checks that all system-required fields have been correctly populated in your document. If any are missing, then you'll be presented with a new screen showing which fields are missing entries. From here, you can navigate to all and fill in the missing data.

After all the required fields are completed, the following message appears on the status bar, in the lower-left corner of your screen (see Figure 4.16).

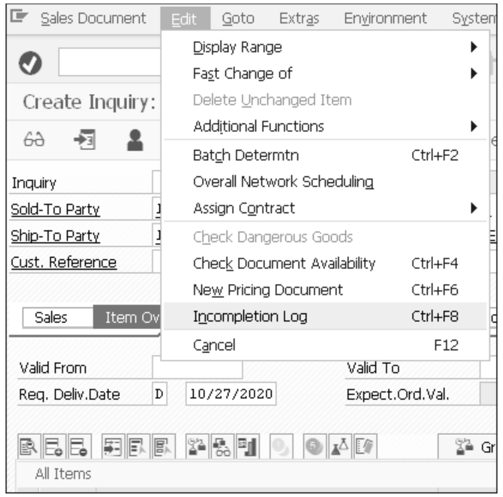


Figure 4.15 Create Inquiry: Incompletion Log

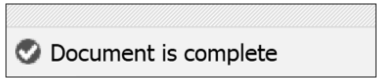


Figure 4.16 Document Complete Message

4.3.5 Printing Output

If you'll be issuing either a hard copy or soft copy output to the customer, you can look at the inquiry to be printed on the screen before completing it to ensure that everything looks correct. At this point, the inquiry is still not yet saved and therefore isn't active in the system. Accordingly, the system will generate a proposed or preview version of the document for you to review on screen. Only when you save the inquiry will a finalized version be generated with a document number and then printed/emailed to the customer.

You can also look at the output conditions to see how the specific output type was determined. Let's first look at the output itself. In the **Create Inquiry: Overview** screen, you can click the **Header Output Preview** icon, as shown in Figure 4.17. This will generate an onscreen print preview of the output.

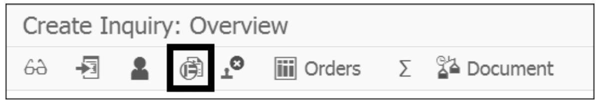


Figure 4.17 Create Inquiry Overview: Header Output Preview Button

There is also a handy **Display Output Request** icon, as shown Figure 4.18, that will navigate you directly to the outputs screen.

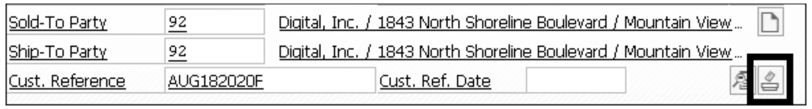


Figure 4.18 Create Inquiry: Display Output Request Button

Next, if you want to see the technical details regarding the output type and how it was determined, there are a couple of ways to do this. You can choose **Extras • Output • Header • Edit** from the menu bar to open the output request screen to show you the **Output** type created, as shown in Figure 4.19.

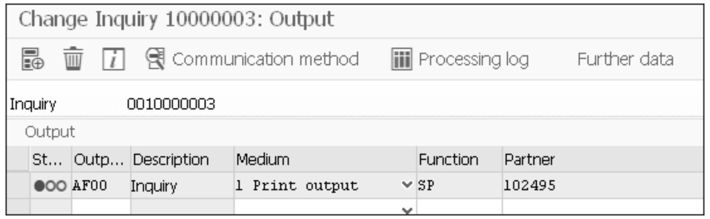


Figure 4.19 Create Inquiry: Outputs Request Screen

In the preceding example, the **AF00** standard inquiry output type has failed to print (evidenced by the red traffic light). A yellow traffic light means that it's waiting to be printed, whereas a green light means that it has printed. The term "print," of course, can mean printing a hard copy as well as creating a soft copy to be transmitted in numerous ways, including PDF via email or electronic data interchange (EDI).

All outputs store data in certain formats for review. A specific output type can be specified by following standard sales and distribution condition technique processing (see Chapter 2, Section 2.2.3, for condition technique details). If you want to see how the output has been determined, you can do this from the same output request screen. From the menu bar, choose **Goto • Determination Analysis** to access a very busy screen where you can analyze how the output has been selected, as shown in Figure 4.20.

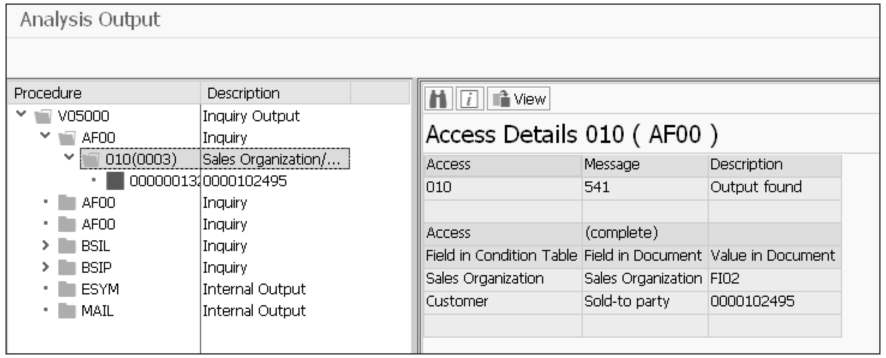


Figure 4.20 Create Inquiry: Analysis Output Screen

In this figure, on the right-hand side is given the details of how the output was determined. From here, you can see that the output type AF00 has been determined via a combination of the sales organization US30 and sold-to party 92 in the inquiry.

You're now ready to save your inquiry. Click on the **Save** icon, as shown in Figure 4.21.

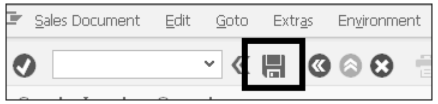


Figure 4.21 Create Inquiry: Save Icon

Your inquiry document number should appear on the status bar in the lower-left corner of your screen, as shown in Figure 4.22.

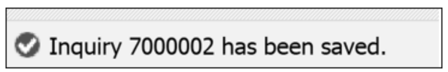


Figure 4.22 Create Inquiry: Saved Message

This inquiry document can now be used to create a quotation should the customer request an upgrade to a legally binding document. This can be done via the **Create with Reference** option.

4.3.6 Managing Sales Inquiries App

To get an overview of all inquiries in the system, it is possible to use the Manage Sales Inquiries app. To use this app, follow the steps laid out below:

1. Launch the Manage Sales Inquiries app in SAP Fiori, and click on the **Create Inquiry** link, as shown in Figure 4.23.

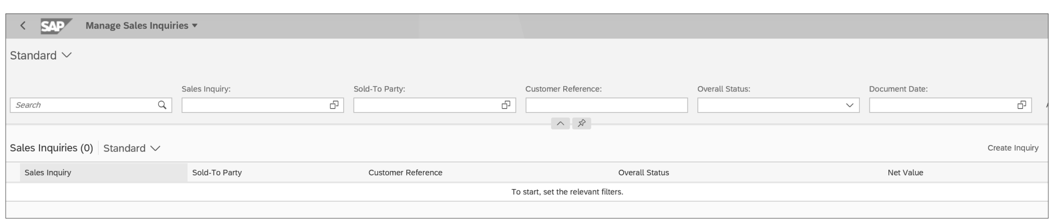


Figure 4.23 Manage Sales Inquiries App

2. In the **Create Inquiry** screen, input values for **Inquiry Type** and **Sales Organization**, **Distribution Channel** and **Division**, as you did previously in the SAP GUI screen (refer to Figure 4.3).
3. In the **Create Inquiry: Overview** screen, input the header data as shown in Figure 4.24. Press Enter.

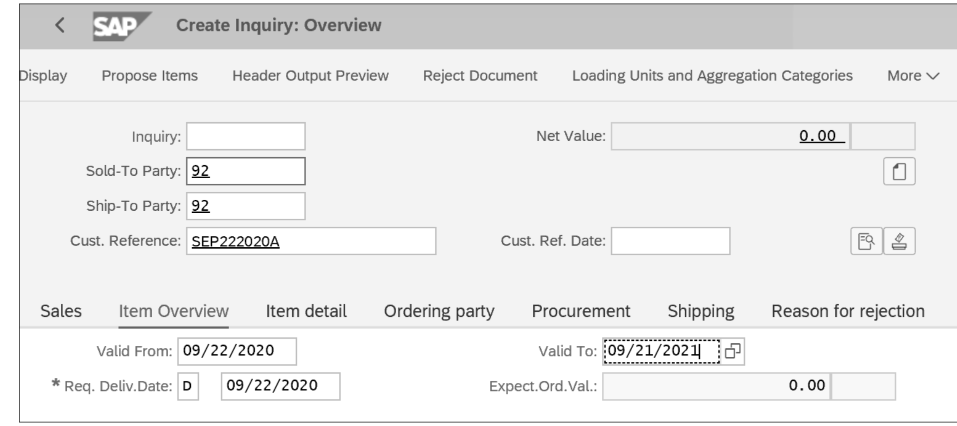


Figure 4.24 Create Inquiry: Header Data in SAP Fiori

Input the line-item information, such as **Material** number and **Order Quantity**, and then press Enter again.

4. To see the incompletion log, go to the menu bar, and choose **More • Edit • Incompletion Log**, as shown in Figure 4.25.

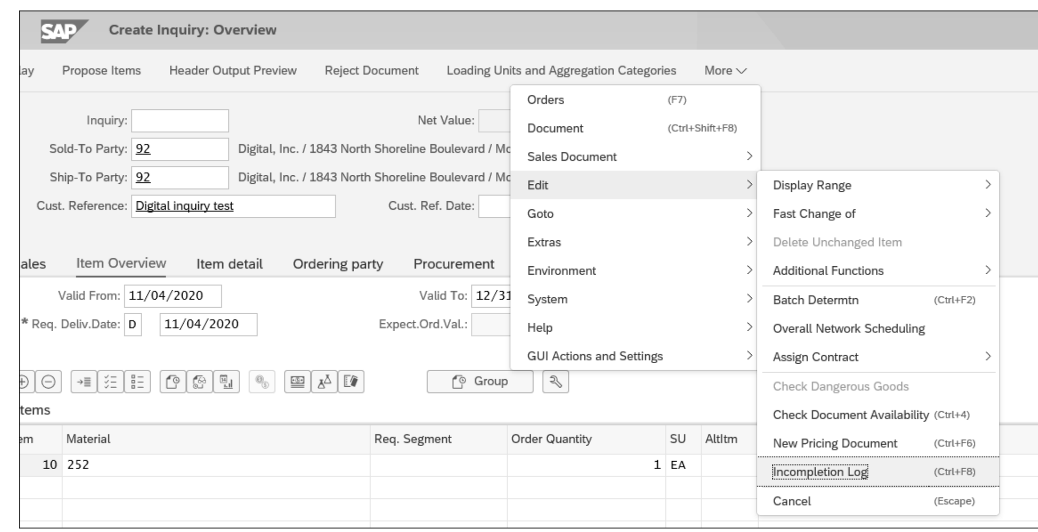


Figure 4.25 Create Inquiry: Incompletion Log in SAP Fiori

In the lower-left corner of the status bar, look for the **Document is complete** message, as shown in Figure 4.26.

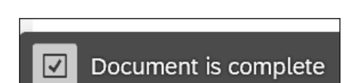


Figure 4.26 Document Complete Message

5. To save your inquiry, click on the **Save** button in the lower-right-hand corner of the SAP Fiori screen.

The message shown in Figure 4.27 should appear with your inquiry document number on the status bar in the lower-left corner of your screen.

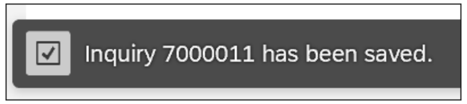


Figure 4.27 Inquiry Saved Message with Document Number

4.4 Change and Display an Inquiry Document

Once your inquiry is created, we need to visit a separate transaction in order to display or amend the Inquiry.

1. To change an inquiry, enter Transaction code VA12.
2. Likewise, to display an inquiry, enter transaction code "VA13". Remember, if you're anywhere *except* the SAP main menu, you must preface your transaction code with "/n" (without the quotation marks). For example, after saving your inquiry, you can go directly to change mode by typing "/NVA12" (without quotation marks) in the transaction code field and then pressing `Enter`.
3. After creating your inquiry document in SAP per the steps in Section 4.3 and seeing the "saved" message (refer to Figure 4.27), you can also display the inquiry by clicking the **Display** icon in the same screen, as shown in Figure 4.28.

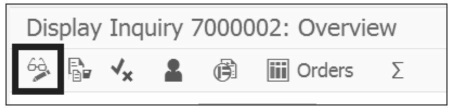


Figure 4.28 Display/Change Icon

4. This navigates directly to Transaction VA13 (Display Inquiry), where you can see the inquiry in display mode, meaning that all fields can be viewed but not amended. Switch to change mode by clicking the **Change** icon again, as shown in Figure 4.28.

Note

From Transaction VA13, pressing `Enter` will take you by default to the **Item Overview** tab in the inquiry. Alternatively, from the front screen of Transaction VA13, you can select the **Sales** tab, **Ordering Party** tab, or other tabs to navigate accordingly.

Tip

By clicking the **Change** or **Display** buttons in the toolbar, you can toggle back and forth in the document.

Identical to the **Create Inquiry** screens, the **Change** and **Display** screens are separated into three sections: overview, header, and line item. The initial screen is the **Overview** screen and shows the **Item Overview** default tab.

The main inquiry fields to be reviewed via change or display modes are as follows:

- **Inquiry**
  Found in the upper-left corner of the **Overview** screen. This field can't be changed.
- **Inquiry Type**
  For such an important field, SAP hides this in the **Sales** tab of the header section. This field can't be changed.
- **Sold-to Party/Ship-to Party**
  Found just below the **Inquiry Document Number** on the **Overview** screen. These fields can be changed if there are no subsequent documents. Please see Chapter 9, Section 9.12, for more information.
- **Sales Area**
  Like the **Inquiry Document Type**, this critical information is found in the **Sales** tab of the header section. All three component fields can't be changed.
- **Cust. Reference**
  This optional field is found just below the **Sold-to Party** and **Ship-to Party** fields on the **Overview** screen. The field can be changed.
- **Net Value**
  Found on the top right of the **Overview** screen, this field is a sum of all price conditions. If the prices are changed in the line item **Conditions** tab, then those changes will be reflected here.
- **Material Number/Description**
  Material numbers and their corresponding descriptions appear in the grid in the center of the **Overview** screen. New **Material Number** line items can be added. However, deleting them is restricted if there are follow-on documents. See Chapter 9, Section 9.12.
- **Order Quantity/Unit of Measure**
  These two fields appear together with the material numbers and descriptions in the **Overview** screen. These fields can't be changed, although there are ways to add or reduce quantities (see Chapter 9, Section 9.12.
- **Valid From/Valid To**
  These fields are found in the center of the **Overview** screen. Both the dates may be changed as necessary.

> **Note**
> For more information about which fields can and can't be changed, and how to undo or reverse documents, see Chapter 9 and the matrix therein.

By selecting the other tabs available in the **Overview** screen, you can see other key fields, as shown in Table 4.1.

Overview Tab	Field	Can Be Changed	Description
Sales	**Pyt terms**	Yes	The terms of payment allocated to the payer.
Sales	**Incoterms**	Yes	The delivery and shipping terms agreed to by the sold-to party.
Item Detail	**Item Category**	Yes, if there are no follow-on documents	A code that defines how the material behaves in the document. This is determined based on criteria set up in the configuration.
Item Detail	**Pricing Date**	Yes, if there are no follow-on documents	The date used to determine the price according to the criteria set up in the configuration.
Ordering Party	**Delivering Plant**	Yes, if there are no follow-on documents	Plant, if assigned to the customer master. This field can be found by scrolling to the right in the material grid (and can be customized to be visible without scrolling, if desired).
Reason for Rejection	**Order Reason**	Yes	Reason the inquiry was placed.
Reason for Rejection	**Reason for Rejection**	Yes, if there are no follow-on documents	Reason why the inquiry has been rejected (see Chapter 9, Section 9.12).

Table 4.1 Display Inquiry: Overview Fields

Normally the information in the **Overview** screen will be enough to give you the main points of the inquiry. However, as noted previously, more information can be found by drilling down in the header and line-item sections of the inquiry.

To access the header tabs, choose **Goto • Header** from the menu bar or select the **Header** icon, both of which are shown in Figure 4.29.

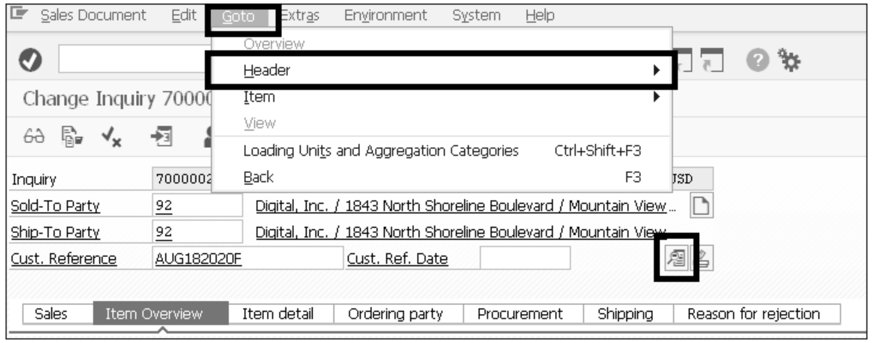


Figure 4.29 Header Options

Much of the information in the header tabs can also be found in the **Overview** screen tabs, but there are also some key bits of additional data here, the details of which can be found in Section 4.3.

To view the line-item details, choose **Goto • Item**, or click the **Item Details** icon, both of which are shown in Figure 4.30. You also can double-click on the line item itself.

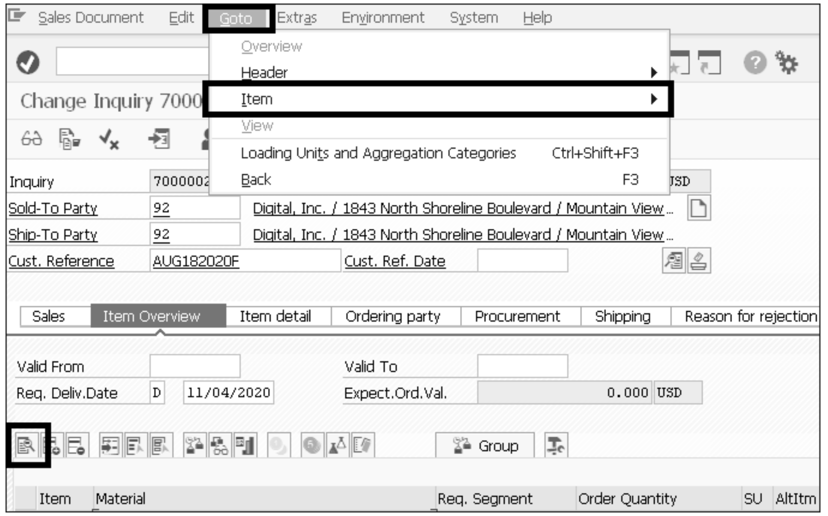


Figure 4.30 Item Options

Again, much of the information in the **Item** tabs can also be found in the **Overview** tabs. For more information, refer to the line-item fields discussed in Section 4.3.

4.4.1 Document Flow and Status Overview

Document flow is essential in understanding your transactions in terms of completeness. The **Document Flow** icon is located in the toolbar of Transaction VA12 (Change Inquiry) and Transaction VA13 (Display Inquiry), as shown in Figure 4.31.

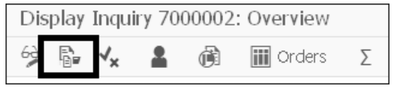


Figure 4.31 Document Flow Icon

The document flow functionality is available in the following sales and distribution documents:

- Inquiries
- Quotations
- Sales orders
- Deliveries
- Billing documents

This icon displays all preceding and follow-on documents that have been created for the document you're currently looking at. This is critical information for determining how to complete the sales and distribution flow through billing or to reverse it, if necessary.

As an example, if your inquiry has been converted into a firm quotation, you would see that in the document flow, as shown in Figure 4.32. Furthermore, if your quotation had been converted into a sales order, that would also show, and so on all the way through to billing.

By clicking to select any one of the documents and then clicking on the **Display Document** button, you can navigate directly to that specific document in display mode.

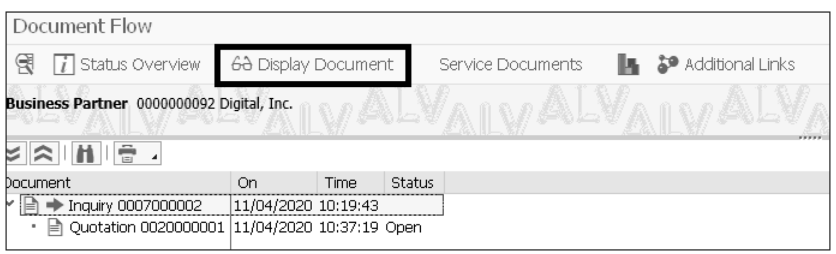


Figure 4.32 Document Flow

Another useful icon in the **Change Inquiry** and **Display Inquiry** overview screens is **Status Overview**, as shown in Figure 4.33.

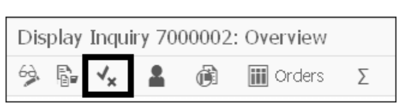


Figure 4.33 Status Overview Icon

By using the **Status Overview** icon, you can get a full view of the header and item status of the inquiry as shown in Figure 4.34. Again, note that this icon is available for more than just inquiries; it's also available for these sales and distribution documents:

- Inquiries
- Quotations
- Sales orders

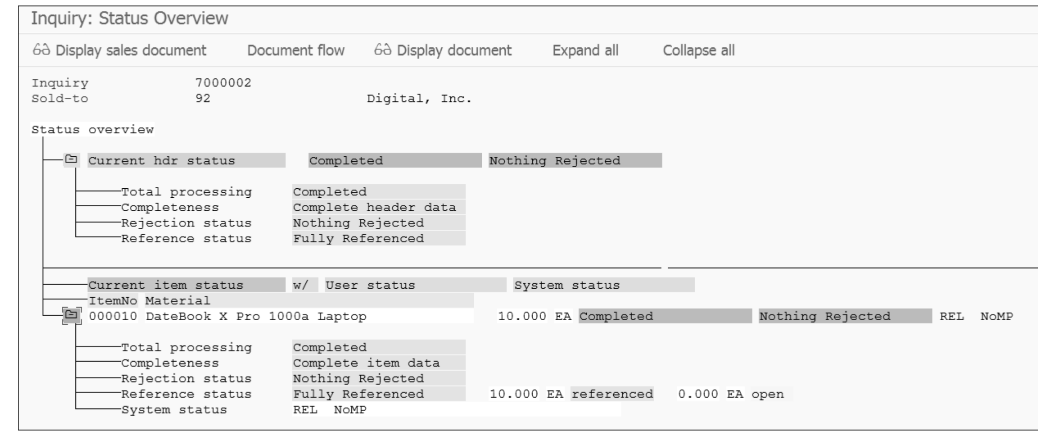


Figure 4.34 Status Overview Details

The **Inquiry: Status Overview** screen will show you the overall header and item status for the whole document, including the following item statuses:

- Complete as far as the incompletion procedure is concerned
- Referenced by a subsequent document
- Rejected

4.4.2 Create Subsequent Order

A key action from an inquiry is to create the subsequent sales order when the customer has "firmed up" its requirements into a sales order. Normally, the quotation follows the inquiry, but, in some cases, a customer will request a sales order directly from an inquiry document; in this instance, you would want to create your sales order with reference to your inquiry. To do this, choose **Sales Document • Create Subsequent Order**, as shown in Figure 4.35.

This will save any changes made to the inquiry document and immediately open the Transaction VA01 (Create Sales Order). We'll cover this in more detail in Chapter 6.

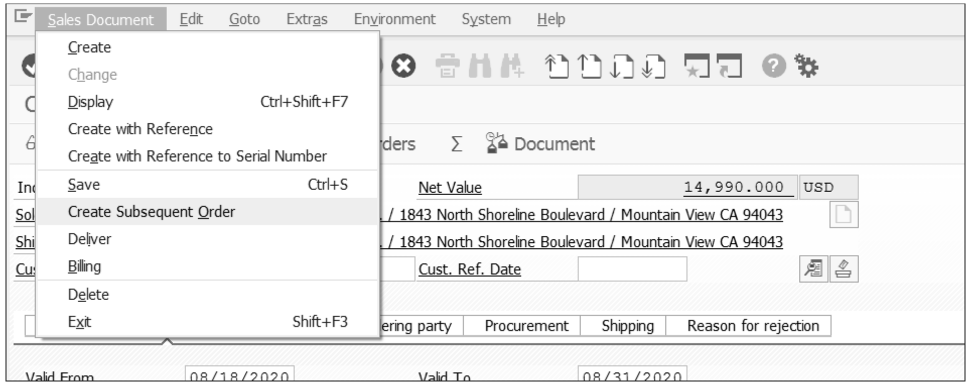


Figure 4.35 Creating a Subsequent Document

4.4.3 Create with Reference

From the same menu path, you can select **Create with Reference** to pull items from other documents into your new inquiry. Note that this can only be achieved if your system has been set up in such a way to allow copying from another document into an inquiry.

4.4.4 Mass Change

The **Edit** menu has some very useful features you can take advantage of, particularly if your inquiry has multiple items in it. Figure 4.36 shows the options for mass changing all the items in the inquiry document.

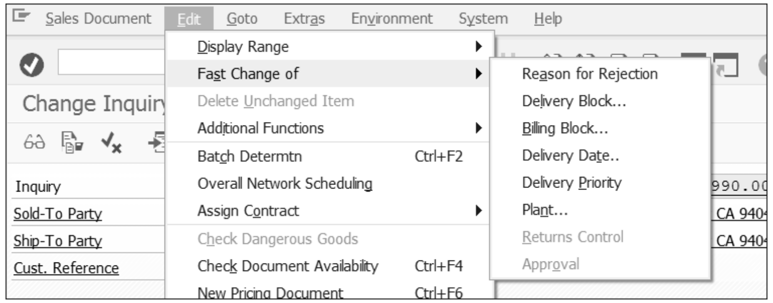


Figure 4.36 Making Mass Changes with the Fast Change Option

> **Note**
>
> The **Fast Change of** function can be used for all items or only those items that have been selected in advance.

4.4.5 Manage Sales Inquiries App

In SAP Fiori, inquiries can be accessed and amended via the "Manage Sales Inquiries" app.

1. Launch the Manage Sales Inquiries app, and input the inquiry document number to be changed or displayed in the **Sales Inquiry** field, as shown in Figure 4.37. Press `Enter`.

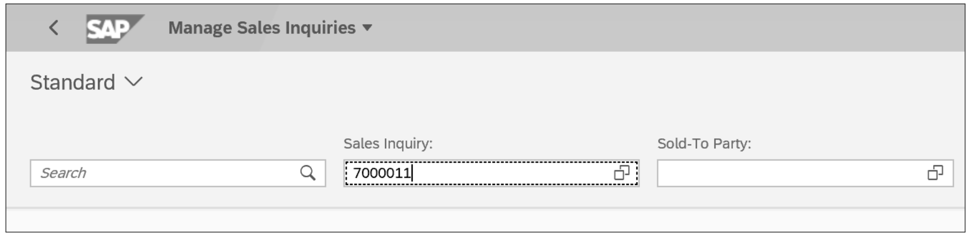


Figure 4.37 Manage Sales Inquiries App

2. Click on your document number to open the context-sensitive menu shown in Figure 4.38.

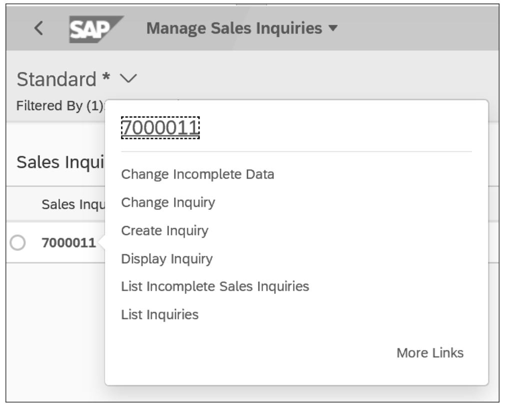


Figure 4.38 Manage Sales Inquiries: Context Menu

3. Click on the desired link in the context menu (for this example, **Change Inquiry**). The **Change Inquiry: Overview** screen appears, as shown in Figure 4.39.
4. Because there are no subsequent documents, all fields can be changed. Change the customer to "20" in both the **Sold-To Party** and **Ship-To Party** fields, and then press `Enter` to see the results in Figure 4.40.

> **Note**
>
> Refer to Section 4.4.1 for more information about which fields can be changed.

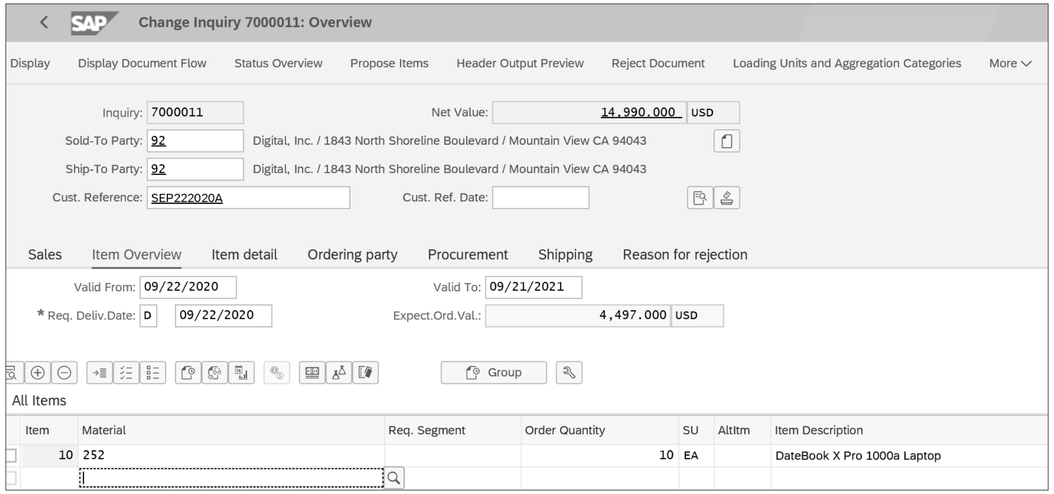


Figure 4.39 Change Inquiry: Overview Screen

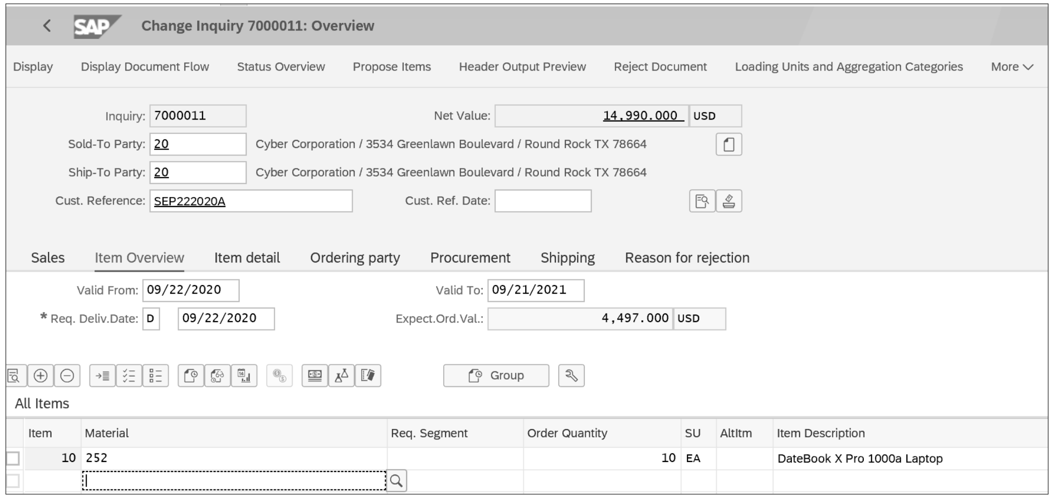


Figure 4.40 Change Inquiry Overview: Changing the Customer Number

5. To save changes to your inquiry click on the **Save** button in the lower-right corner of the SAP Fiori screen. A message should appear with your inquiry document number on the status bar in the lower-left corner of your screen, as shown in Figure 4.41.

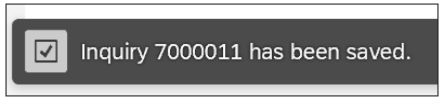


Figure 4.41 Save Message with Document Number

4.5 List of Inquiries

You can look up inquiries based on various search criteria by using Transaction VA15 (List of Inquiries). For example, if you're unsure of the inquiry document number to be changed or displayed, you can perform a search, as shown in Figure 4.42.

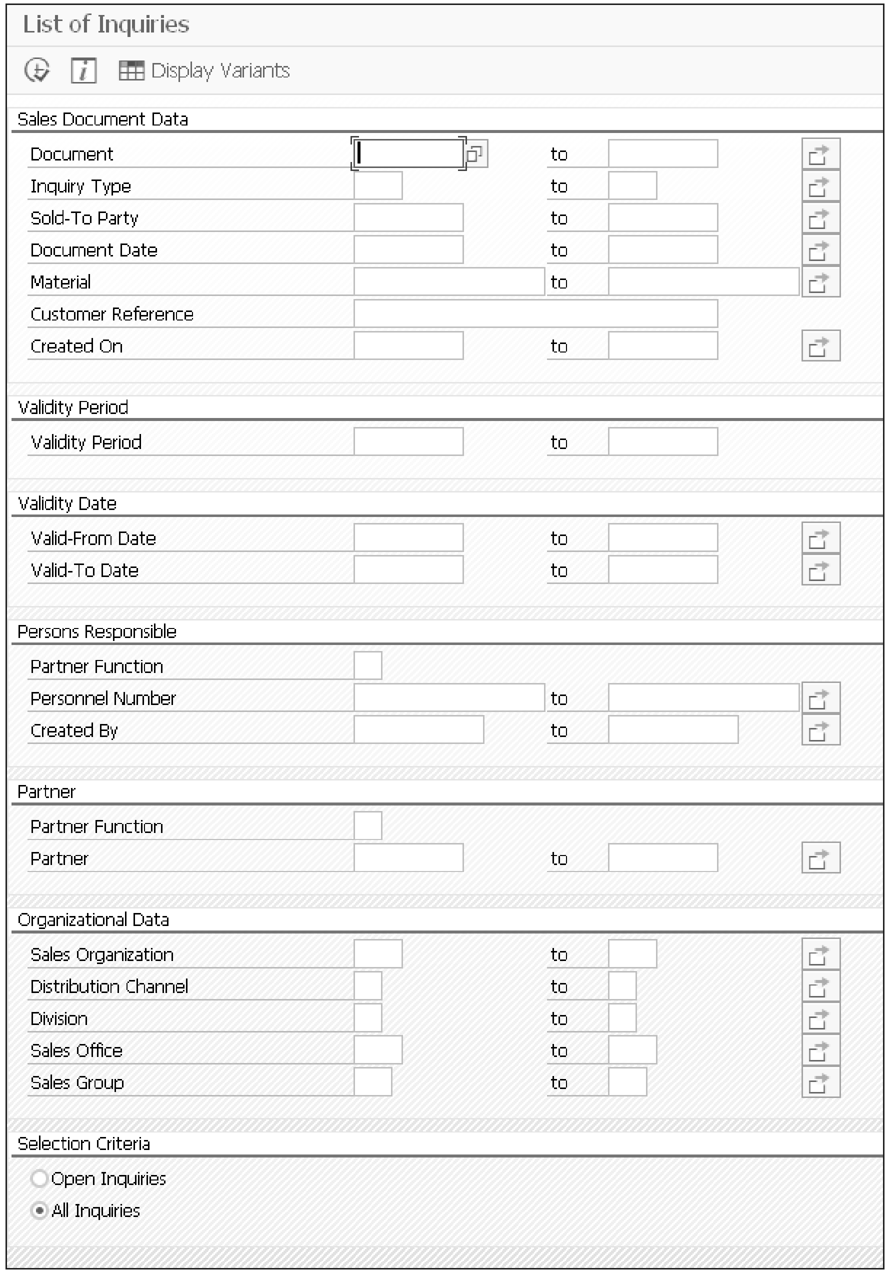


Figure 4.42 List of Inquiries Screen

To search for an inquiry, follow these steps:

1. Scroll to the bottom of the selection screen, as shown in Figure 4.43, to see the **All Inquiries** or **Open Inquiries** (i.e., inquiries that haven't been referenced in a follow-on document, e.g., a quotation) radio buttons.

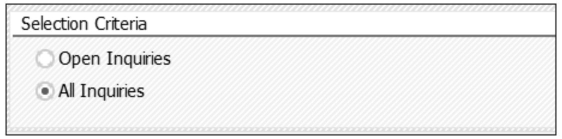
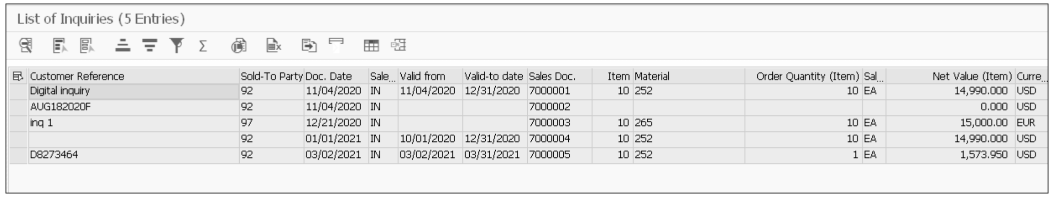


Figure 4.43 List Inquiries Selection Criteria Options

2. Input some selection parameters, such as **Sold-to Party** number and date range, into the report and execute. You have a choice of many other parameters as well, such as **Created by**, so you can easily limit the search to your own inquiries. The default columns in your output report will appear as shown in Figure 4.44, but they can be customized easily.



List of Inquiries (5 Entries)

Customer Reference	Sold-To Party	Doc. Date	Sale...	Valid from	Valid-to date	Sales Doc.	Item	Material	Order Quantity (Item)	Sal...	Net Value (Item)	Curre...
Digital inquiry	92	11/04/2020	IN	11/04/2020	12/31/2020	7000001	10	252	10	EA	14,990.000	USD
AUG182020F	92	11/04/2020	IN			7000002					0.000	USD
inq 1	97	12/21/2020	IN			7000003	10	265	10	EA	15,000.00	EUR
	92	01/01/2021	IN	10/01/2020	12/31/2020	7000004	10	252	10	EA	14,990.000	USD
D8273464	92	03/02/2021	IN	03/02/2021	03/31/2021	7000005	10	252	1	EA	1,573.950	USD

Figure 4.44 Default Output for List Inquiries Transaction

3. To customize the columns you see in the report, you can select the **Change Layout** icon from the icon bar, as shown in Figure 4.45.

Figure 4.45 Change Layout Icon

> **Note**
> The following options are standard to all reports in SAP, so it's information you can use often.

From here, you're presented with a dialog box showing your currently selected layout (in this example, **1SAP (Inquiries – Items)**, as shown in Figure 4.46.

4. To remove displayed columns from your report, select the columns from the **Displayed Columns** list on the left, and click the right arrow to move them back to the **Column Set** list.

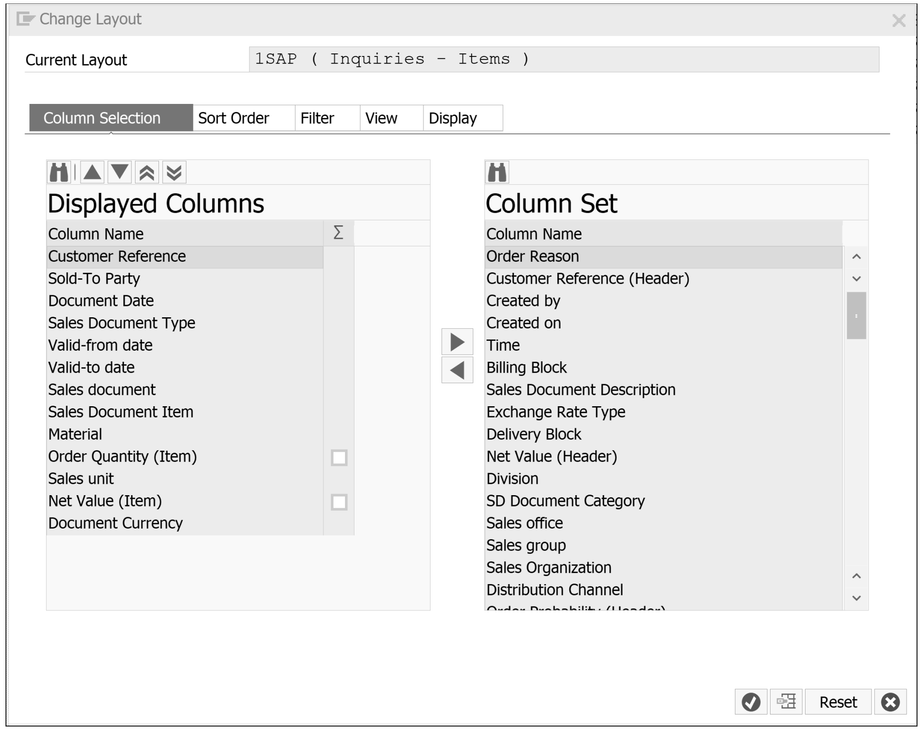


Figure 4.46 List of Inquiries: Change Layout Dialog Box

5. Similarly, to add new columns into your display, select the columns from the **Column Set** list on the right, and click the left arrow to move them to the **Displayed Columns** list.
6. Notice that some fields, such as **Order Quantity (Item)** and **Net Value (Item)**, have a checkbox available next to them in a sum column (refer to Figure 4.46). Check this box to prominently display the column total at the bottom.
7. Use the **Sort Order**, **Filter**, **View**, and **Display** tabs in this screen to change the order of the data, select filtering for certain values, and determine how the data is viewed and presented, respectively. An example of **Display** tab options is shown in Figure 4.47.

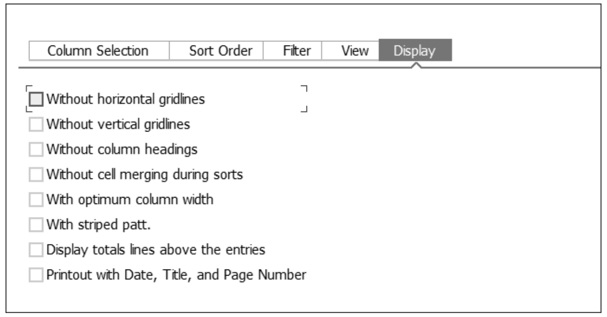


Figure 4.47 List of Inquiries: Change Layout Display Options

8. When you're happy with the layout of the **List of Inquiries** screen, save it for future use by clicking the **Save as** button, and you'll see the screen shown in Figure 4.48.

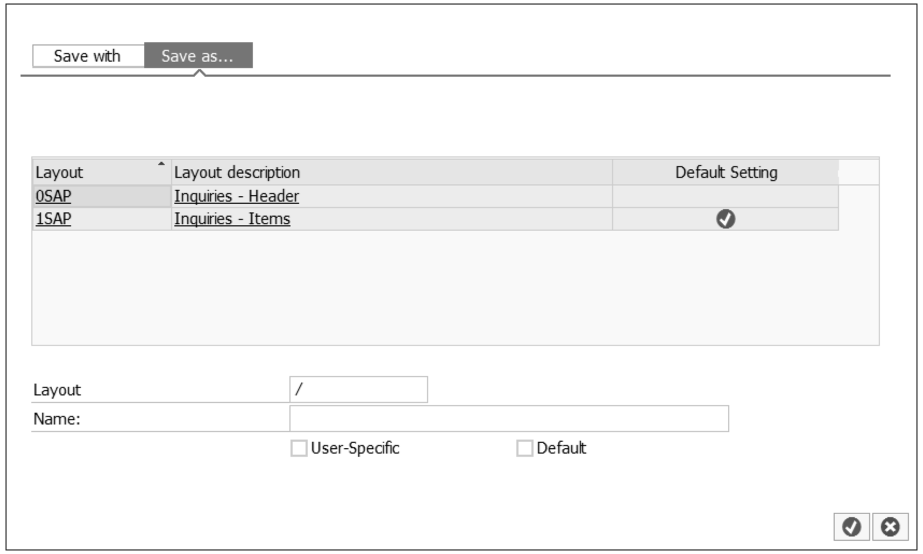


Figure 4.48 List of Inquiries: Saving the Layout

9. Create a name for your layout in the **Layout** field. Note the usage of the "/" (without quotation marks) as a possible prefix, as follows:
   - If you use "/" as a prefix for your layout name, the system will treat this as system-wide and make it visible to all users. If you are creating a system-wide layout for everyone to use by including the "/," the **User-Specific** checkbox below must NOT be clicked; otherwise, the system will throw the error "User-specific layouts must start with a letter (A-Z)."
   - If the "/" is omitted as a prefix, then the layout will be user-specific (i.e., only to be seen by you). If you are creating a user-specific layout for your own personal use by omitting the "/," you must also click the **User-Specific** checkbox; otherwise, the system will throw the error "Standard layouts must start with the character /."

   The **Default** checkbox can be clicked to select the new layout to be used automatically, whether by you as a user-specific layout or as a system-wide default by everyone.

Note

Be careful! If you leave the **User-Specific** checkbox blank, create a layout name starting with "/" so it will be system-wide, and then click the **Default** button, then any existing layout currently used by all users in the system by default will be switched to the new one. Your phone might start ringing!

After you've generated a list of inquiries, you may want to export this to Microsoft Excel. To do so, click on the **Export to Excel** icon on the toolbar, as shown in Figure 4.49. Again, this is a commonly used command in many other reports in SAP applications to facilitate various kinds of analysis.

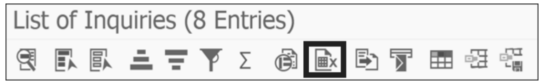


Figure 4.49 List of Inquiries: Export to Excel Icon

This will launch Excel. Accept any warning about opening a file with a macro, and you'll be presented with your list exported into Excel, ready to be saved as an Excel file, as shown in Figure 4.50.

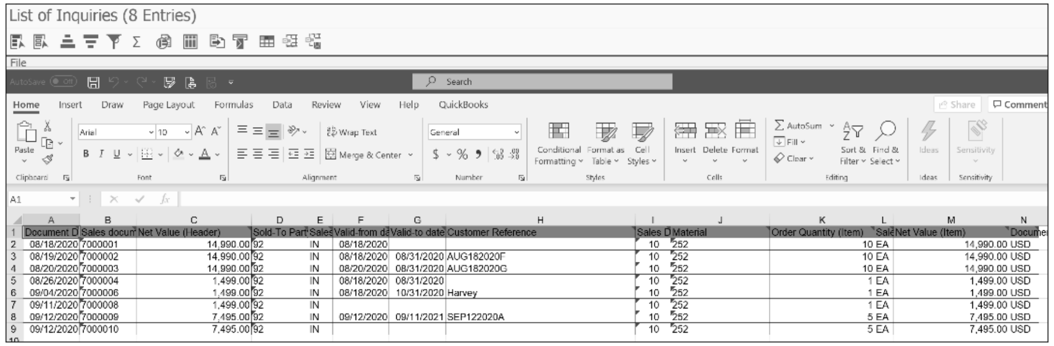


Figure 4.50 List of Inquiries: Excel View

4.5.1 Mass Change

We close our SAP GUI discussion with a little-used option in the list of inquiries: **Mass Change** (see Figure 4.51). This works similarly to the **Mass Change** feature we examined in earlier in Section 4.4.4. Note that this isn't available in the Manage Sales Inquiries app.

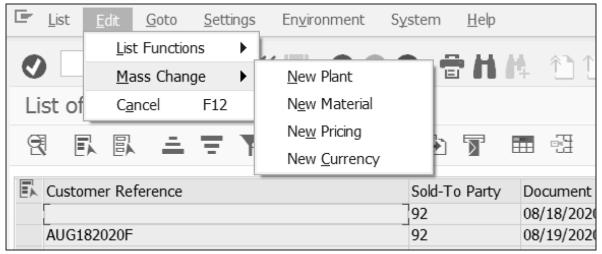


Figure 4.51 List of Inquiries: Mass Change

From here, you can select the entries you want to change and then make changes to the plant, material, pricing, or currency according to specific input parameters. For example, by selecting **New Currency** from the **Mass Change** menu options, the system will ask you which "from" and "to" currencies to use; in other words, which currencies do you want to change and to what?

The example in Figure 4.52 shows the system selecting all documents with a currency of USD and converting them to currency EUR.

Figure 4.52 New Currency Mass Change

When processing a mass change, the change is carried out by SAP in the background without any transactional foreground activity. When the mass change is completed, SAP will post a message to tell you that the inquiries in question have been changed and saved.

4.5.2 Manage Sales Inquiries

In the Manage Sales Inquiries app, there are a number of ways to search and find desired data.

First, you should be aware of the filters area, as shown in Figure 4.53, wherein you can build a set of selection parameters in the same way you do in Transaction VA15 in SAP GUI.

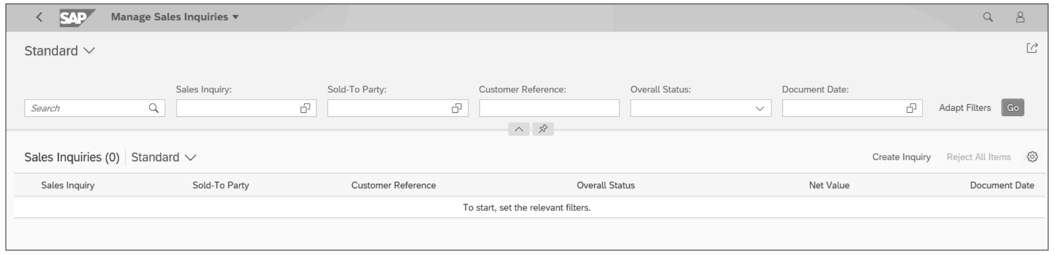


Figure 4.53 Manage Sales Inquiries: Filters

From here, you can select the **Adapt Filters** button shown in Figure 4.54, in order to amend the filters available.

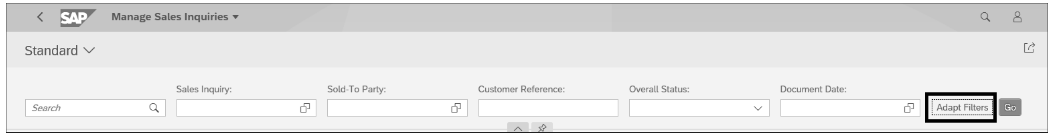


Figure 4.54 Manage Sales Inquiries: Adapt Filters

If you want to add sales area as a search criterion for future use, for example, follows these steps:

1. After clicking on the Adapt Filters button, click on the **More Filters** button at the bottom of the screen. This then open the **Select Filters** dialog box, as shown in Figure 4.55.

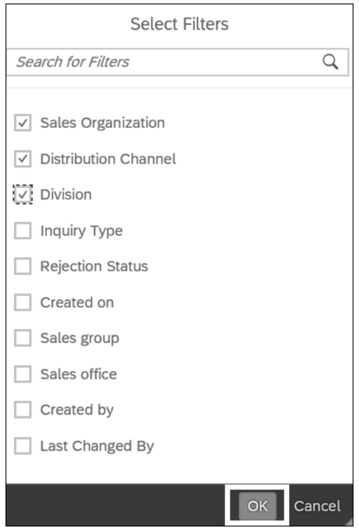


Figure 4.55 Select Filters: Options

2. Check the desired filters, which for this example are the sales area fields: **Sales Organization**, **Distribution Channel**, and **Division**. Click on the **OK** button.

   The **Adapt Filters** dialog, thus amended, then appears.
3. Click on the **Save** button. The **Save View** dialog appears.
4. For this example, enter "My Standard" into the **View** field to create a new search view.
5. Choose the **Set as Default** checkbox so the system will display this selection automatically by default. Click on **Save**.
6. The **Adapt Filters** dialog now reappears with your selected search parameters. Enter the desired sales area data to search by, and then click Go, as shown in Figure 4.56.

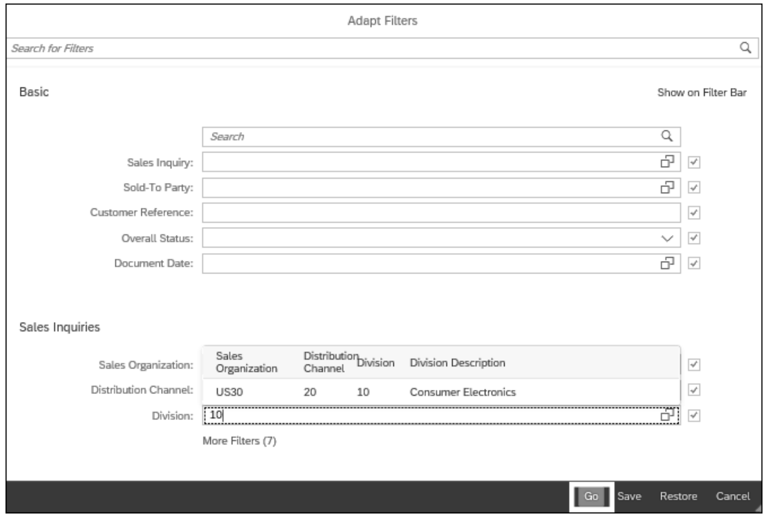


Figure 4.56 Filters Now Adapted

Your search results and new search view are output as shown in Figure 4.57.

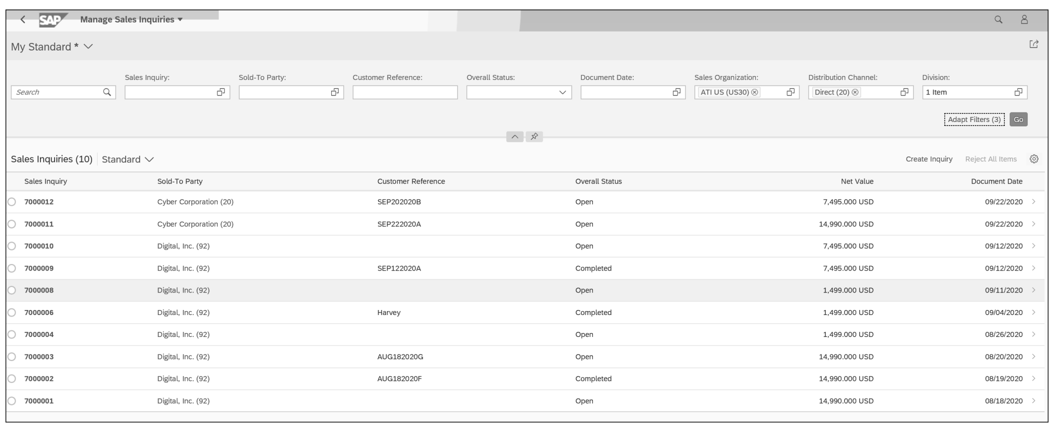


Figure 4.57 Manage Sales Inquiries: Amended with Filters

Note that the search parameters are displayed on top as **My Standard**. This is to be distinguished from the **Standard** view of the search results shown in the middle of the screen.

The **Overall Status** dropdown serves to restrict output by **Completed**, **In Process**, **Not Relevant**, or **Open** inquiries (see Figure 4.58), much like the radio buttons in Transaction VA15 discussed earlier.

7. After your filters are set correctly and saved, you can do the same for your output method. Your layout settings can be amended by using the **Settings** icon, as shown Figure 4.59. The drop-down arrow next to **standard** is used to save the settings once amended.

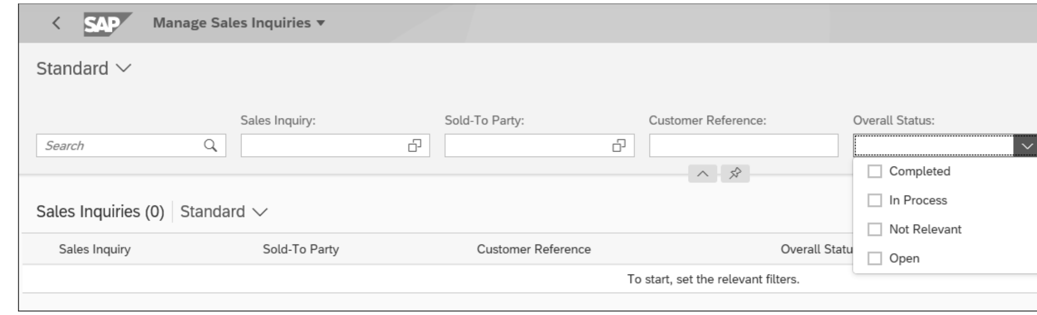


Figure 4.58 Manage Sales Inquiries: Overall Status Filter Options

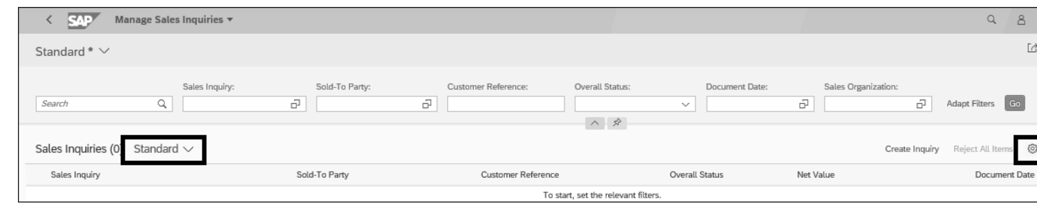


Figure 4.59 Manage Sales Inquiries: Settings and Layout Save

8. After you click the **Settings** icon, the **View Settings** dialog appears, as shown in Figure 4.60. This is where you can select and rearrange desired columns, just as in Transaction VA15.

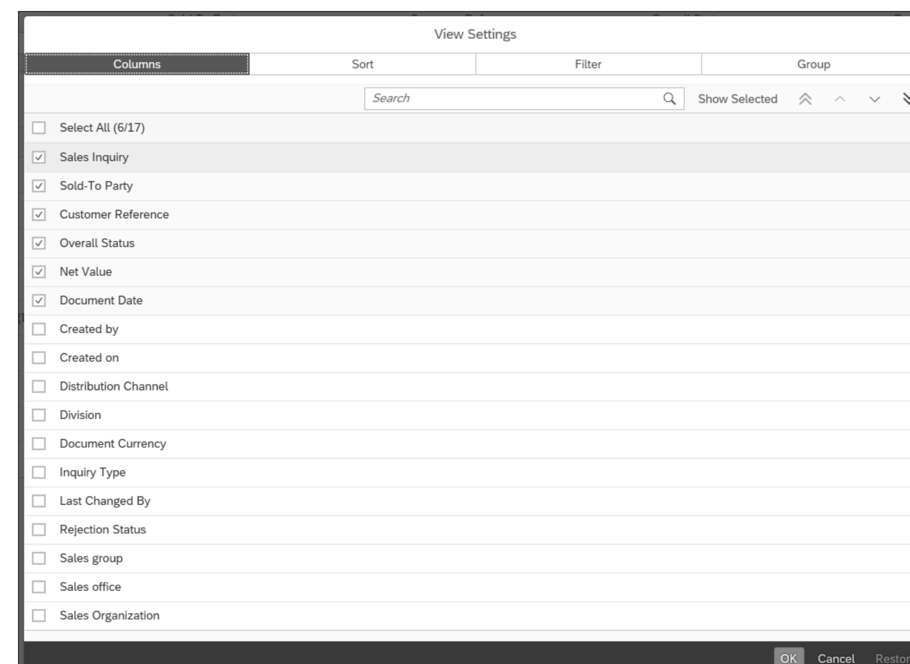


Figure 4.60 Manage Sales Inquiries: Layout Settings Menu

9. When the settings have been amended, you can save the layout by selecting the drop-down arrow next to standard, as highlighted in Figure 4.59.
10. Once back on the output results screen, explore the selected inquiry documents by clicking on the inquiry number or the customer name, and drilling down into further detailed data (see Figure 4.61).

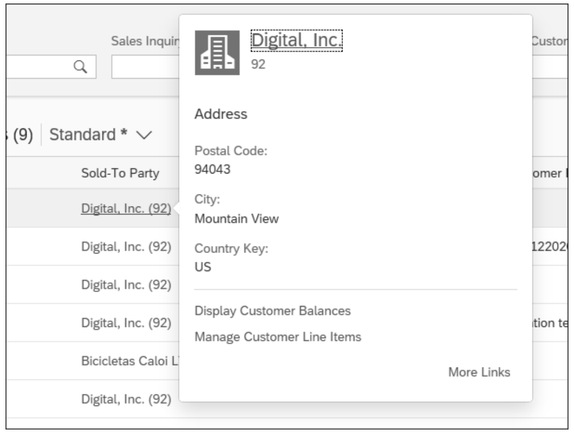


Figure 4.61 Manage Sales Inquiries: Sold-to Party Drilldown Data

11. From this option, click on the **More Links** button in the lower-right corner to add more detailed links for drilldown capabilities. Figure 4.62 shows the available drilldown options for the customer number.

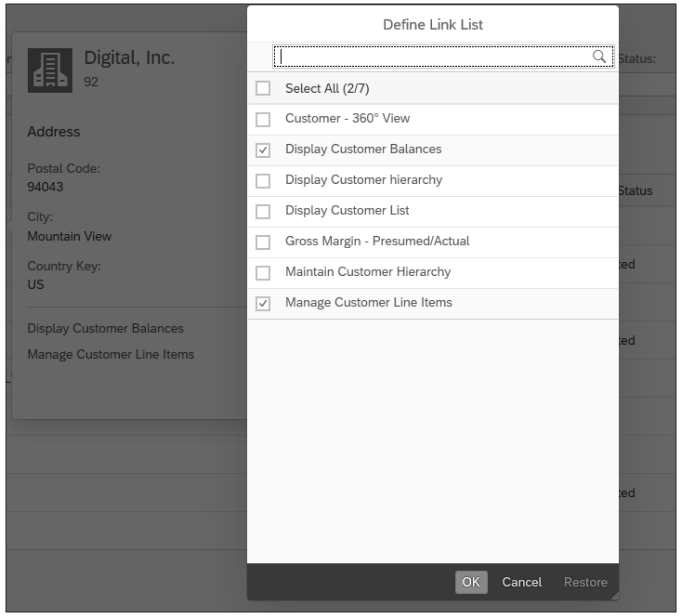


Figure 4.62 Manage Sales Inquiries: More Links

When using these drilldown options, remember that you can navigate to other apps for related data in the Manage Sales Inquiries app. You can also navigate directly to the inquiry itself by clicking anywhere on the line in the display screen.

As noted in Section 4.4.1, you can also click on the inquiry numbers directly to reveal the context-sensitive menu permitting you to open the selected inquiry in change or display modes, as shown in Figure 4.63.

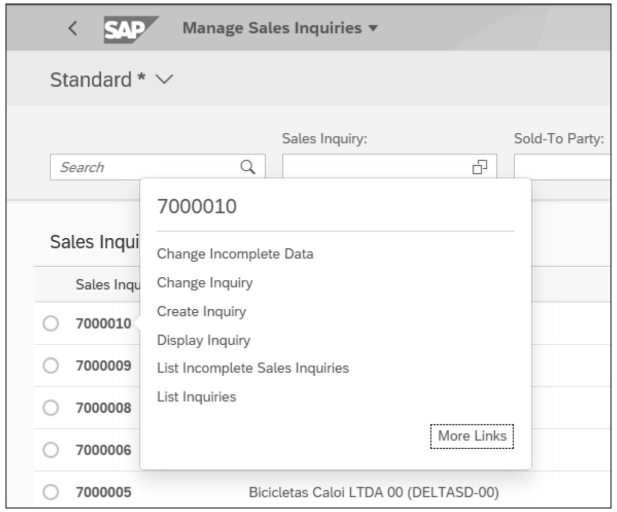


Figure 4.63 Manage Sales Inquiries: Inquiry Number Drilldown

4.6 Summary

In this chapter, we have explored the concept of the presales document, inquiries. This is traditionally the initial step in the order-to-cash process and understanding this gives you a sound knowledge of how SAP S/4HANA sales documents work for all other documents in the process: quotations, sales orders, deliveries and billing. You will find as your understanding of sales and distribution in SAP S/4HANA grows, that many of the principles that the sales and distribution module relies upon, and which have been outlined in this chapter, can be applied to all of these documents.

In the next chapter, we will build upon your new-found sales and distribution knowledge and apply it to the next document in the process: quotations.

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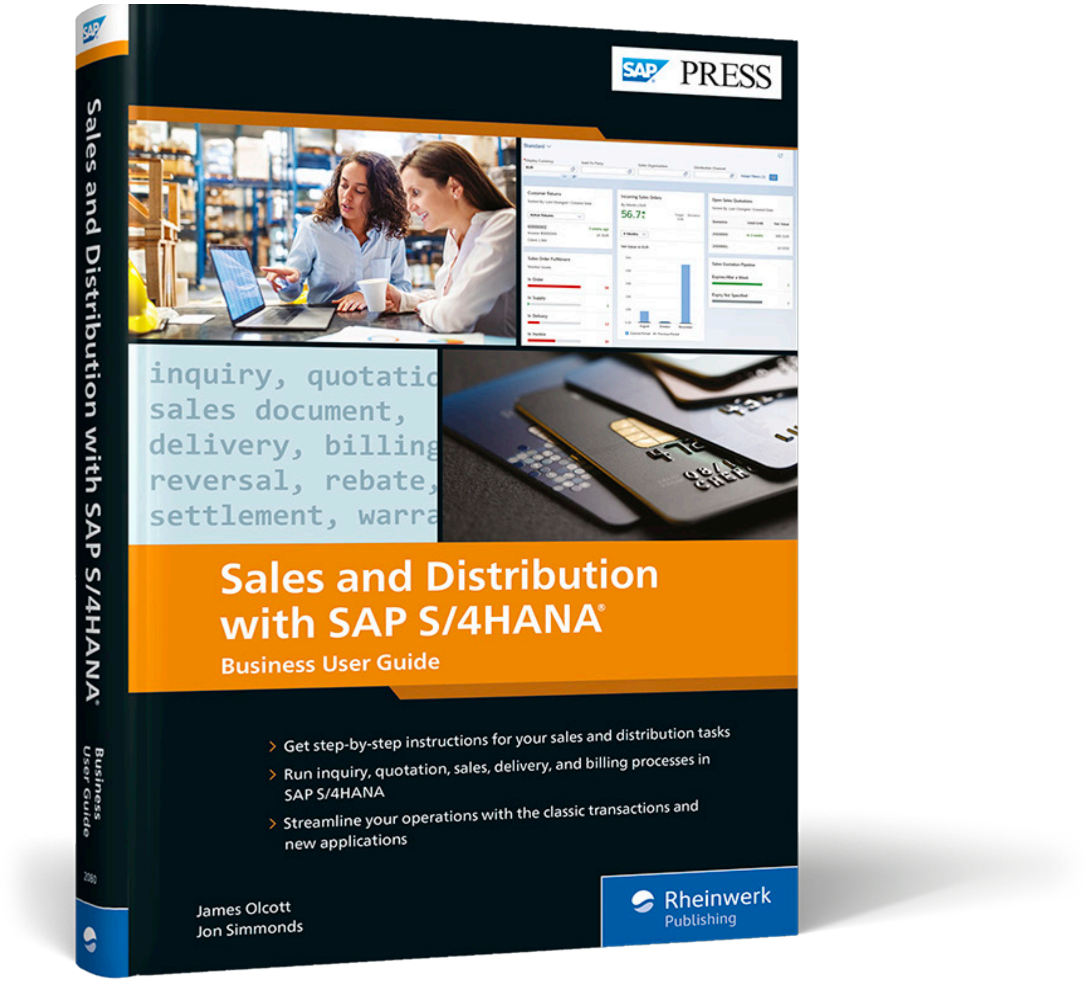

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