

S4520

Purchasing in SAP S/4HANA

COURSE OUTLINE

Course Version: 23

Course Duration:

SAP Copyrights, Trademarks and Disclaimers

© 2023 SAP SE or an SAP affiliate company. All rights reserved.

No part of this publication may be reproduced or transmitted in any form or for any purpose without the express permission of SAP SE or an SAP affiliate company.

SAP and other SAP products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of SAP SE (or an SAP affiliate company) in Germany and other countries. Please see <https://www.sap.com/corporate/en/legal/copyright.html> for additional trademark information and notices.

Some software products marketed by SAP SE and its distributors contain proprietary software components of other software vendors.

National product specifications may vary.

These materials may have been machine translated and may contain grammatical errors or inaccuracies.

These materials are provided by SAP SE or an SAP affiliate company for informational purposes only, without representation or warranty of any kind, and SAP SE or its affiliated companies shall not be liable for errors or omissions with respect to the materials. The only warranties for SAP SE or SAP affiliate company products and services are those that are set forth in the express warranty statements accompanying such products and services, if any. Nothing herein should be construed as constituting an additional warranty.

In particular, SAP SE or its affiliated companies have no obligation to pursue any course of business outlined in this document or any related presentation, or to develop or release any functionality mentioned therein. This document, or any related presentation, and SAP SE's or its affiliated companies' strategy and possible future developments, products, and/or platform directions and functionality are all subject to change and may be changed by SAP SE or its affiliated companies at any time for any reason without notice. The information in this document is not a commitment, promise, or legal obligation to deliver any material, code, or functionality. All forward-looking statements are subject to various risks and uncertainties that could cause actual results to differ materially from expectations. Readers are cautioned not to place undue reliance on these forward-looking statements, which speak only as of their dates, and they should not be relied upon in making purchasing decisions.

Typographic Conventions

American English is the standard used in this handbook.

The following typographic conventions are also used.

This information is displayed in the instructor's presentation



Demonstration



Procedure



Warning or Caution



Hint



Related or Additional Information



Facilitated Discussion



User interface control

Example text

Window title

Example text

Contents

vii Course Overview

1 Unit 1: Purchasing Master Data

- | | |
|---|---|
| 1 | Lesson: Creating Material Master Records for Purchasing |
| 1 | Lesson: Creating Business Partners |
| 1 | Lesson: Using Partner Functions in Purchasing |

3 Unit 2: Sources of Supply and Conditions

- | | |
|---|--|
| 3 | Lesson: Analyzing Price Determination Basics |
| 3 | Lesson: Working with Purchasing Info Records |
| 3 | Lesson: Creating Special Info Records |
| 3 | Lesson: Adjusting Prices Collectively in Info Records |
| 3 | Lesson: Working with Contracts |
| 3 | Lesson: Creating Contracts for Material Groups |
| 4 | Lesson: Working with Scheduling Agreements |
| 4 | Lesson: Creating Scheduling Agreements Without Release Documentation |
| 4 | Lesson: Creating Scheduling Agreements with Release Documentation |

5 Unit 3: Source Determination

- | | |
|---|--|
| 5 | Lesson: Controlling Source Determination with Source Lists |
| 5 | Lesson: Maintaining Source Lists |
| 5 | Lesson: Controlling Source Determination with Quota Arrangements |
| 5 | Lesson: Executing the Planning Run with Quota Arrangements |
| 5 | Lesson: Identifying Additional Aspects of Source Determination |
| 5 | Lesson: Blocking Sources of Supply |
| 6 | Lesson: Using Catalogs in Sourcing |

7 Unit 4: Optimized Purchasing

- | | |
|---|---|
| 7 | Lesson: Processing Unassigned Purchase Requisitions |
| 7 | Lesson: Processing Assigned Purchase Requisitions |
| 7 | Lesson: Monitoring Purchase Orders |
| 7 | Lesson: Deploying Situation Handling |

9	Unit 5:	Document Release Procedure
9		Lesson: Releasing Purchase Requisitions
9		Lesson: Releasing Purchasing Documents
9		Lesson: Configuring Release Procedures in Customizing
9		Lesson: Creating Release Procedures
9		Lesson: Setting Up Flexible Workflows in Purchasing
11	Unit 6:	Specific Procurement Processes
11		Lesson: Using Invoicing Plans
11		Lesson: Creating Blanket Purchase Orders
11		Lesson: Working with Subcontracting
11		Lesson: Purchasing with Manufacturer Part Numbers (MPNs)
11		Lesson: Deploying Additional Special Functions
13	Unit 7:	Supplier Evaluation
13		Lesson: Evaluating Suppliers Using Logistics Information System
13		Lesson: Setting Up Vendor Evaluation Using Logistics Information System
13		Lesson: Explaining KPIs in Supplier Evaluation
15	Unit 8:	Selected Additional Topics
15		Lesson: Customizing Document Types in Purchasing
15		Lesson: Setting Up Field Selection in Purchasing Documents
15		Lesson: Deploying Version Management in Purchasing (Optional Lesson)
15		Lesson: Analyzing Special Aspects in Customizing
15		Lesson: Defining Function Authorizations for Buyers

Course Overview

TARGET AUDIENCE

This course is intended for the following audiences:

- Application Consultant
- Project Manager
- End User

Lesson 1: Creating Material Master Records for Purchasing

Lesson Objectives

After completing this lesson, you will be able to:

- Maintain purchasing data in the material master record

Lesson 2: Creating Business Partners

Lesson Objectives

After completing this lesson, you will be able to:

- Maintain purchasing data for business partners

Lesson 3: Using Partner Functions in Purchasing

Lesson Objectives

After completing this lesson, you will be able to:

- Use partner roles in purchasing

Lesson 1: Analyzing Price Determination Basics

Lesson Objectives

After completing this lesson, you will be able to:

- Use conditions and calculation schemas

Lesson 2: Working with Purchasing Info Records

Lesson Objectives

After completing this lesson, you will be able to:

- Manage purchasing info records

Lesson 3: Creating Special Info Records

Lesson Objectives

After completing this lesson, you will be able to:

- Create special types of info records

Lesson 4: Adjusting Prices Collectively in Info Records

Lesson Objectives

After completing this lesson, you will be able to:

- Carry out price changes

Lesson 5: Working with Contracts

Lesson Objectives

After completing this lesson, you will be able to:

- Manage contracts
- Get to know analytics for contracts

Lesson 6: Creating Contracts for Material Groups

Lesson Objectives

After completing this lesson, you will be able to:

- Create contracts for material groups

Lesson 7: Working with Scheduling Agreements

Lesson Objectives

After completing this lesson, you will be able to:

- Manage scheduling agreements

Lesson 8: Creating Scheduling Agreements Without Release Documentation

Lesson Objectives

After completing this lesson, you will be able to:

- Create scheduling agreements without release documentation

Lesson 9: Creating Scheduling Agreements with Release Documentation

Lesson Objectives

After completing this lesson, you will be able to:

- Create scheduling agreements with release documentation

Lesson 1: Controlling Source Determination with Source Lists

Lesson Objectives

After completing this lesson, you will be able to:

- Understand and manage source lists

Lesson 2: Maintaining Source Lists

Lesson Objectives

After completing this lesson, you will be able to:

- Maintain source lists

Lesson 3: Controlling Source Determination with Quota Arrangements

Lesson Objectives

After completing this lesson, you will be able to:

- Create and maintain quota arrangements

Lesson 4: Executing the Planning Run with Quota Arrangements

Lesson Objectives

After completing this lesson, you will be able to:

- Use quota arrangements for source determination in the planning run

Lesson 5: Identifying Additional Aspects of Source Determination

Lesson Objectives

After completing this lesson, you will be able to:

- Identify priorities in source determination

Lesson 6: Blocking Sources of Supply

Lesson Objectives

After completing this lesson, you will be able to:

- Block sources of supply

Lesson 7: Using Catalogs in Sourcing

Lesson Objectives

After completing this lesson, you will be able to:

- Use catalogs in purchasing

Lesson 1: Processing Unassigned Purchase Requisitions

Lesson Objectives

After completing this lesson, you will be able to:

- Assign and process purchase requisitions

Lesson 2: Processing Assigned Purchase Requisitions

Lesson Objectives

After completing this lesson, you will be able to:

- Process assigned purchase requisitions

Lesson 3: Monitoring Purchase Orders

Lesson Objectives

After completing this lesson, you will be able to:

- Monitor order confirmations and deliveries

Lesson 4: Deploying Situation Handling

Lesson Objectives

After completing this lesson, you will be able to:

- Introduce Situation Handling
- Understand the key concepts and features in Situation Handling

Lesson 1: Releasing Purchase Requisitions

Lesson Objectives

After completing this lesson, you will be able to:

- Release blocked purchase requisitions

Lesson 2: Releasing Purchasing Documents

Lesson Objectives

After completing this lesson, you will be able to:

- Release blocked purchase orders

Lesson 3: Configuring Release Procedures in Customizing

Lesson Objectives

After completing this lesson, you will be able to:

- Check Customizing settings for release procedures

Lesson 4: Creating Release Procedures

Lesson Objectives

After completing this lesson, you will be able to:

- Create release procedures for purchase requisitions

Lesson 5: Setting Up Flexible Workflows in Purchasing

Lesson Objectives

After completing this lesson, you will be able to:

- Set up flexible workflows in purchasing

Lesson 1: Using Invoicing Plans

Lesson Objectives

After completing this lesson, you will be able to:

- Identify differences between periodic and partial invoice plans

Lesson 2: Creating Blanket Purchase Orders

Lesson Objectives

After completing this lesson, you will be able to:

- Create blanket purchase orders

Lesson 3: Working with Subcontracting

Lesson Objectives

After completing this lesson, you will be able to:

- Procure goods using subcontracting

Lesson 4: Purchasing with Manufacturer Part Numbers (MPNs)

Lesson Objectives

After completing this lesson, you will be able to:

- Execute a purchasing process with MPNs

Lesson 5: Deploying Additional Special Functions

Lesson Objectives

After completing this lesson, you will be able to:

- Examine special functions for procurement

Lesson 1: Evaluating Suppliers Using Logistics Information System

Lesson Objectives

After completing this lesson, you will be able to:

- Process supplier evaluation

Lesson 2: Setting Up Vendor Evaluation Using Logistics Information System

Lesson Objectives

After completing this lesson, you will be able to:

- Set up vendor evaluation

Lesson 3: Explaining KPIs in Supplier Evaluation

Lesson Objectives

After completing this lesson, you will be able to:

- Explain KPIs in supplier evaluation

Lesson 1: Customizing Document Types in Purchasing

Lesson Objectives

After completing this lesson, you will be able to:

- Change settings for document types

Lesson 2: Setting Up Field Selection in Purchasing Documents

Lesson Objectives

After completing this lesson, you will be able to:

- Customize screen layouts for purchasing documents

Lesson 3: Deploying Version Management in Purchasing (Optional Lesson)

Lesson Objectives

After completing this lesson, you will be able to:

- Activate version management for purchasing documents

Lesson 4: Analyzing Special Aspects in Customizing

Lesson Objectives

After completing this lesson, you will be able to:

- Maintain system messages and user parameters in Purchasing

Lesson 5: Defining Function Authorizations for Buyers

Lesson Objectives

After completing this lesson, you will be able to:

- Check the EFB user parameter