

Design Challenge

1. Story

The aim of this application is to help the export commercial assistant in the realization of their daily tasks.

Today, my user has between 5 and 7 different transactions for realizing its daily tasks. Between the sales order's delivery creation, the picking/packing and the parcel's invoicing, they finish their work day under stress and tiredness. The business process its self is already difficult to understand, with the legal subtleties to be taken into account for the invoicing and the customer relationship to manage, but when you have to know by heart what you can do in each transaction and be careful to not do the wrong action, the task becomes unbearable, even more if you are new at the job.

One of the most important required information will be: the status of the sales order because the customers always need to know when they are going to receive the needed materials. This means that a commercial assistant needs to be aware of the:

- Stock availability when creating an order
- Delivery creation and delivery status (plus the shipping/packing information)
- Goods movements (in our case for the billing process to be started)

SEGMENTATION: the application may be useful for any group of customers in the follow-up of the order to cash process which implies dealing with the export (custom) subtleties.

TARGETING: the application will serve for the metallurgical industry exporting finished products

POSITIONING: the application will give the required visibility on the order to cash process advancement and also will give the possibility to respect all the custom requests in matter of weight, amount, transport, etc.

2. Persona

Virginia

Sales assistant for the export group operations

"In my work, time and details mean money to lose or to win, that's why I need precise and 100% sure information."

ABOUT

42 years old, married, 15 years of experience

The job implies being able to work under pressure and have always the right information regarding the delivery scheduling, the invoice data (quantity, amount, weights, etc.), that's why I need to be sure I can rely on the system information.

Not mobile

WORKS WITH

- Export actors: Group’s Legal department, Bank’s legal department, custom employees
- Business: Customers (which may be a country’s Minister), transporter
- Inside the group: Warehouse workers, IT department, Business analysts

JOBS RESPONSABILITIES

- Follow the customer sales order from the creation till the invoicing
- Create the invoice by respecting all the legal and custom details
- Manage the customer relationship and contracts (legal details)

MAIN GOALS

- Unsure that the customer gets the ordered parts in time
- Be sure that the shipment passes the customs checks
- Responsible of the payment from the customer
- Add the missing transport and custom charges

NEEDS

- Need to be informed of the materials availability and the delivery advancement (pick/pack/goods issue)
- To be informed of all the custom changes
- To be able to create the shipment list to be invoiced
- Be able to inform the customer of the sales order advancement

PAIN POINTS

- In SAP the invoice can be referenced to a delivery/sales order and not to a parcel, or I need to be able to create a shipment based on parcels because sometime a customer require urgently a material and can wait for another. This decision can be taken by phone and at any minute.
- I use 5 different transactions for doing my tasks, which have quit similar information, only the actions to be done are different.

3. User Experience Journey

MINDSET	Need to check the sales order status before the customer calls	Which transaction it is first?	Ok, there are 3 picked/packed parcels	Can I invoice and ship them to the customer? Great, I can!!	Now I need to copy the parcel numbers for invoicing	Oh another transacti on that looks the same	OK, now I just need to check the weights, amounts and add the transport charges Ok, it is for Argentina. I hope this time everything is OK.	Thank God the weights are OK; the amount is less than the maximum accepted. I can go throw the process!!!
ACTIONS	Get the list of the on-going sales	Login to SAP	Check the columns related to the parcel	Check if they correspond do the customers	Copy the parcel numbers	Add the parcel numbers	Select the parcels	Validate the invoice

	orders Choose the sales order to be analyzed	Go to transaction "check SO status"	creation	requirement	Go to transaction for invoicing	in the selection screen Launch the cockpit	Check the required columns Validate the proforma (invoice simulation) Add the charges Check again the amount	Inform the warehouse responsible that he can ship the goods Inform the customer that the goods are coming
TOUCH POINTS	Outlook/Skype	SAP logon Transaction selection-screen	Transaction Check sales order report	Outlook/Excel	Excel/ Transaction for invoicing	Transaction for invoicing	Cockpit for invoicing	Cockpit for invoicing Outlook/Skype Outlook

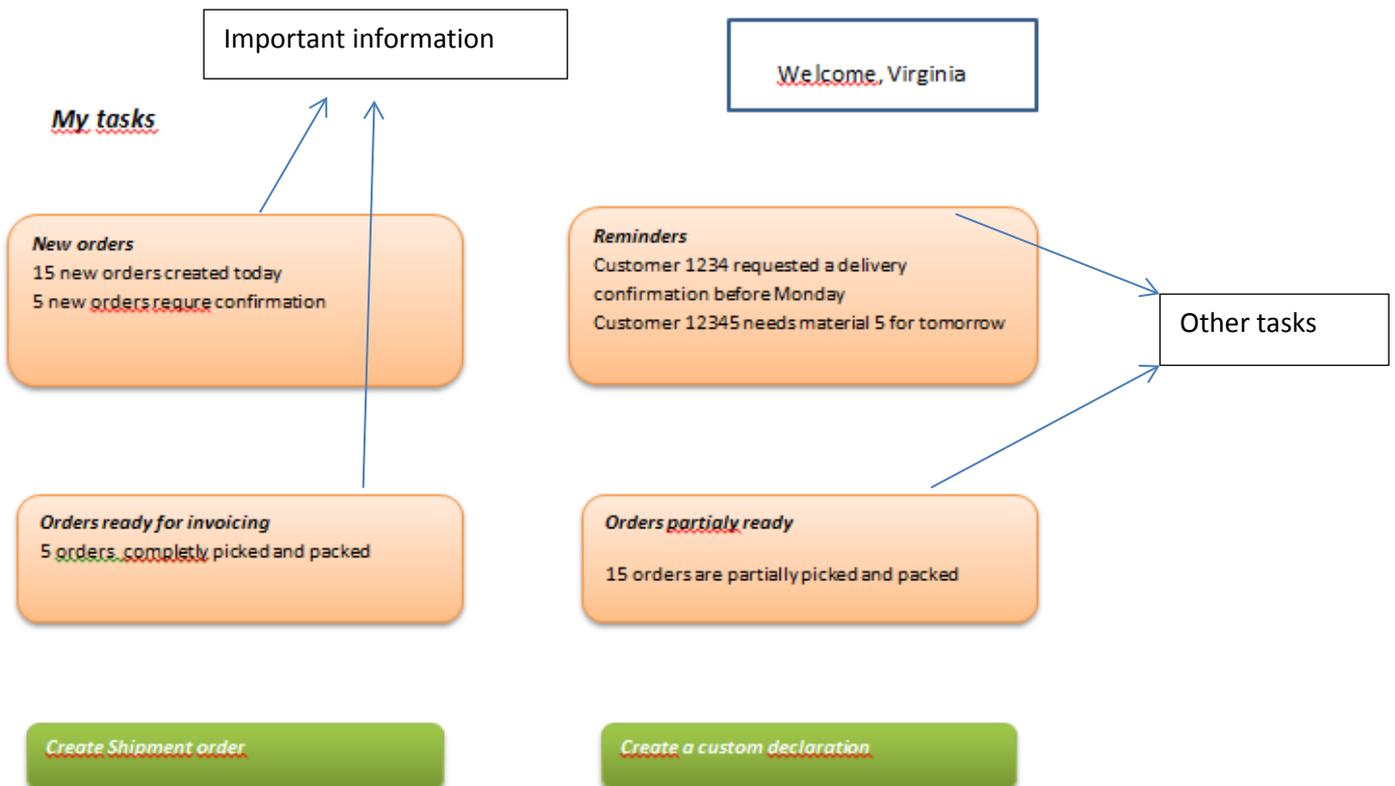
4. Point of View

Virginia deals with the customers that want to know when they will receive their materials so she needs to make sure everything is going OK starting from the order creation till the materials shipment.

5. Mockup

The initial idea of the application

The Launchpad



The idea of the Launchpad is to “push” the maximum important information to Virginia, and also give her a short view on the “other” tasks.

The “New Orders” window where Virginia can confirm the new sales order this way creating the delivery for the items which are available.

Select	Order number	Item number	Customer number	Material number	Quantity	Availability	Partial deliv ?
	101345	10	1234	123	3	3	N
		20	1235	124	5	5	N
		30	1235	125	34	34	N
	101348	10	1234	123	12	12	Y
		20	1236	124	897	34	Y
		30	1235	125	12	10	N
	101351	10	1234	120	2	1	N

The “Orders ready for invoicing” window where Virginia can select the parcels which have been already picked/packed and are ready for the goods issue, hence the invoicing. Only one invoice will be created at the end.

Select	Order number	Customer number	Material number	Parcel number
<input checked="" type="checkbox"/>	101345	1234	123	12
<input type="checkbox"/>	101345	1235	124	13
<input type="checkbox"/>	101345	1235	125	14
<input checked="" type="checkbox"/>	101348	1234	123	15
<input type="checkbox"/>	101348	1236	124	16
<input type="checkbox"/>	101358	1235	125	17
<input checked="" type="checkbox"/>	101351	1234	120	18

After choosing to create the invoice, Virginia will be taken to the “Create New invoice window”, where she can check the weights and add the transport charges.

The transport charges are not always required, that’s why adding the transport charges will be an option.

New invoice.

Customer 1234

Country : Turkey

Material number	Description	Quantity	Parcel number	Amount	Weight
123	Micurr	2	12	1567	78,90
123	Micurr	5	15	1344	890,90
120	lampe	7	18	6343	865,87
<i>Total</i>				9254	1835,67

Add transport charges

Reject for control

Virginia can choose to reject after the weight control or add transport charges. When choosing to add the transport charges a new line will appear in the table.

New invoice
Customer 1234
Country : Turkey

Material number	Description	Quantity	Parcel number	Amount	Weight
123	Mirurr	2	12	1567	78,90
123	Mirurr	5	15	1344	890,90
120	lampe	7	18	6343	865,87
Total				9254	1835,67
Charges	Transport	1		789	
Total after charges				10043	

Create invoice
Reject for control

Once the invoice has been created, Virginia will be lead to the Launchpad and will be able to create the shipment order and the customer declaration.

Create shipment order

Choose	Invoice number	Customer	Amount
✓	1034	1234	10043
	1035	1236	10090
	1036	1235	10078
	1037	1238	10054
	1038	1239	10065
	1030	1230	10234

Create Shipment order

Create custom declaration

Choose	Invoice number	Customer	Amount
✓	1034	1234	10043
	1035	1236	10090
	1036	1235	10078
	1037	1238	10054
	1038	1239	10065
	1030	1230	10234

Create a custom declaration

https://standard.experiencesplash.com/home/projects/ad1ebf1b755f77420bb5c413/ui-composer/1458766274772_S2

6. SAP Web IDE App Prototype

In my application, for the moment I have only used the Master detail page with the possibility to display the details in a grid table, pop-up windows and a new window with a panel.

I did not find an available service on the ES4 server with the sales order information, so I had to create the application from scratch using the examples available on internet.

First screen of the “Export Sales Order” application presents all the sales order, regarding their status.

Export Sales Orders

ID : 300000097
 Customer : 10521
 Shipping point : 0001
 Sales Organization : 1000
 Delivery Date : 2013-05-22

ID : 300000001
 Customer : 10521
 Shipping point : 0001
 Sales Organization : 1000
 Delivery Date : 2013-05-22

ID : 300000002
 Customer : 10521
 Shipping point : 0001
 Sales Organization : 1000

I have used a list object for displaying the sales order information.

For the details it is required to double click on a sales order number.

Export Sales Orders
Order details

ID : 300000097
 Customer : 10521
 Shipping point : 0001
 Sales Organization : 1000
 Delivery Date : 2013-05-22

ID : 300000001
 Customer : 10521
 Shipping point : 0001
 Sales Organization : 1000
 Delivery Date : 2013-05-22

ID : 300000002
 Customer : 10521
 Shipping point : 0001
 Sales Organization : 1000

300000097

11113.00
13224.47

2013-05-22

No Handling unit created

City: Walldorf, 69190

ItemID	Product	Quantity	TaxAmount	
10	HT-1000	1.000	181.64	New
20	HT-1091	2.000	9.88	Packing done
30	HT-6100	2.000	178.22	No Handling unit created
40	HT-1000	2.000	363.28	New
50	HT-1091	3.000	14.82	Packing done

In the "Detail" window I have used a header object, a simple form and a grid table for displaying the items information. The idea is to give the possibility to check the lines that have already been packed and can be used for creating the proforma.

City: Walldorf, 69190

ItemID	Product	Quantity	TaxAmount	
20	HT-1091	2.000	9.88	Packing done
30	HT-6100	2.000	178.22	No Handling unit created
40	HT-1000	2.000	363.28	New
50	HT-1091	3.000	14.82	Packing done
60	HT-6100	2.000	178.22	No Handling unit created

+ Create a proforma ✓ Pre-Approve

The button “Pre-approved” gives the possibility to add the selected lines to the invoice that will be created.

A pop-up window appears when clicking on it.

ID : 300000097
Customer : 10521
Shipping point : 0001
Sales Organization : 1000
Delivery Date : 2013-05-22

300000097 13224.47 EUR

11113.00
2013-05-22

No Handling unit created

? Approve Invoice

Do you want to pre-approve this items for invoicing?

OK Cancel

ItemID	Product	Quantity	TaxAmount	
20	HT-1091	2.000	9.88	Packing done
30	HT-6100	2.000	178.22	No Handling unit created
40	HT-1000	2.000	363.28	New

It disappears after clicking “OK” and confirms the action with a short message.

ID : 300000097
Customer : 10521
Shipping point : 0001
Sales Organization : 1000
Delivery Date : 2013-05-22

300000097 13224.47 EUR

11113.00
2013-05-22

No Handling unit created

City: Walldorf, 69190

ItemID	Product	Quantity	TaxAmount	
20	HT-1091	2.000	9.88	Packing done
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60	HT-6100	2.000	178.22	No Handling unit created

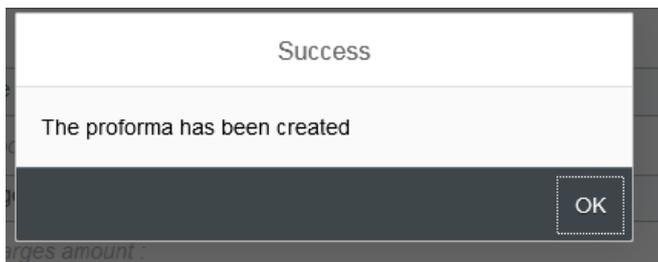
The invoice has been approved

The button “Create Proforma” gives the possibility to create the proforma by adding the last details, like the container number, transport mode and the transport charges amount

Export Sales Orders ← Create Invoice

ID : 300000097 Customer : 10521 Shipping point : 0001 Sales Organization : 1000 Delivery Date : 2013-05-22	Customer : <input type="text" value="Customer :"/>
ID : 300000001 Customer : 10521 Shipping point : 0001 Sales Organization : 1000 Delivery Date : 2013-05-22	Container : <input type="text" value="Container :"/>
ID : 300000002 Customer : 10521 Shipping point : 0001 Sales Organization : 1000	Transport Mode : <input type="text" value="Transport Mode :"/>
+ Create a proforma	Transport charges amount : <input type="text" value="Transport charges amount :"/>

After choosing to submit, the proforma is really created and a success message is being displayed.



That's just the beginning. 😊

Thank you for your evaluation.