AC245
SAP Convergent Invoicing

COURSE OUTLINE

Course Version: 16
Course Duration:
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Typographic Conventions

American English is the standard used in this handbook. The following typographic conventions are also used.

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# Course Overview

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Course Overview

TARGET AUDIENCE
This course is intended for the following audiences:

- Application Consultant
- Business Process Owner/Team Lead/Power User
- Program/Project Manager
- Solution Architect
Lesson 1: Introduction to Billing for High Volume Industries

Lesson Objectives
After completing this lesson, you will be able to:

- Understand the consume-to-cash process
- Understand the business motivation behind SAP Convergent Invoicing
- Provide an example of the consume-to-cash process
- Define a billable item

Lesson 2: Architecture of SAP Convergent Invoicing

Lesson Objectives
After completing this lesson, you will be able to:

- Architecture of SAP Convergent Invoicing
- Explain the architecture of billing and invoicing in an SAP context
- Describe business processes in the billing and invoicing framework
Lesson 1: Business Partner Concept for Convergent Invoicing

Lesson Objectives
After completing this lesson, you will be able to:

- Business Partner Concept for Convergent Invoicing
- Understand the relevant roles and master data

Lesson 2: Contract Accounts for Convergent Invoicing

Lesson Objectives
After completing this lesson, you will be able to:

- Create a contract account
- Understand which fields are important to understand the process at a later stage

Lesson 3: Posting Open Items in FI-CA and FI-GL Integration

Lesson Objectives
After completing this lesson, you will be able to:

- Explain the concept of documents and the processes in Contract Accounts Receivable and Payable
- Explain the concept of integration with the general ledger
- Navigate to the account balance display
- Understand that BITs as input data for billing process needs to include all information for FI-CA document postings.

Lesson 4: Event Technology

Lesson Objectives
After completing this lesson, you will be able to:

- Use event management to integrate customer-specific requirements into the SAP system without modifying SAP programs
Lesson 1: Billable Item Management Overview

Lesson Objectives
After completing this lesson, you will be able to:

- Understand the prerequisites for the billing process
- Understand the process steps in billing

Lesson 2: Performing Billable Item Management

Lesson Objectives
After completing this lesson, you will be able to:

- Perform billable item management
- Understand the processing rules and the storage of billable items
- Create your own BIT class

Lesson 3: Creating and Monitoring Billable Items

Lesson Objectives
After completing this lesson, you will be able to:

- Create and monitor billable items
- Generate billable Items for test purposes
- Display billable items in preparation for executing the billing process
Lesson 1: Concepts of Billing in Contract Accounts Receivable and Payable

Lesson Objectives
After completing this lesson, you will be able to:

- Understand the billing process and billing subprocess
- Identify the key elements of billable items, such as the source transaction code and billable item type

Lesson 2: Billing Process Execution

Lesson Objectives
After completing this lesson, you will be able to:

- Monitor the document structure of billable items
- Run the billing process for a contract account
- Understand the billing

Lesson 3: Scheduling in Billing and Invoicing

Lesson Objectives
After completing this lesson, you will be able to:

- Explain the scheduling rule for billing and invoicing
- Understand which attributes can influence the determination of the scheduling rule
- Explain that scheduling for billing and scheduling for invoicing are two sequenced processes

Lesson 4: Billing Process Configuration for Selection, Grouping, and Aggregation

Lesson Objectives
After completing this lesson, you will be able to:

- Understand how to control which billable items are selected for the billing process
- Understand how to define groupings of billing units
- Define which billable items are aggregated
Lesson 1: Invoicing Overview and Execution

Lesson Objectives
After completing this lesson, you will be able to:
- Describe the general structure of the invoicing process in FI-CA
- Prepare and execute the invoicing process

Lesson 2: Invoicing Process Configuration

Lesson Objectives
After completing this lesson, you will be able to:
- Understand how to control which source documents are selected for the invoicing process
- Understand how to define groupings to invoicing units
- Schedule the invoicing process
- Call additional functions for the invoicing process

Lesson 3: Invoicing Reversal and Billing Reversal

Lesson Objectives
After completing this lesson, you will be able to:
- Understand the invoicing reversal process
- Understand the billing reversal process
- Reverse the invoicing and billing document and restart the process from a billable item
Lesson 1: Invoicing Functions

Lesson Objectives
After completing this lesson, you will be able to:

- Define discounts and charges in invoicing
- Understand collective invoicing
- Understand the creation of invoice lists
- Explain how to activate open items in invoicing
- Explain the ad-hoc invoice function
- Use the payment card function in invoicing
- Understand use of deferred revenue

Lesson 2: Clarification in Invoicing

Lesson Objectives
After completing this lesson, you will be able to:

- Understand which elements can be validated with clarification rules
- Explain the Preliminary Invoice process steps
- Identify in which process steps checks can be added in billing and invoicing
- Use the clarification worklist to clarify cases
UNIT 7
Billing Plans, Debit-Credit Memos

Lesson 1: Billing Plan
Lesson Objectives
After completing this lesson, you will be able to:

- Convergent Invoicing functionality for Billing Plans
- Understand process steps in use of Billing Plans for Billable Items Creation
- Understand how to customize Billing Plans

Lesson 2: Billing Request for Correction
Lesson Objectives
After completing this lesson, you will be able to:

- Understand Convergent Invoicing functionality for Credit Memos or Debit Memos
- Understand process steps in use of Billing Request for Correction
- Understand how to customize Billing Request for Correction
Lesson 1: Invoice Printing

Lesson Objectives
After completing this lesson, you will be able to:

- Use correspondence type 0042 invoice for invoice printing in contract accounts receivable and payable
- Print invoices from the correspondence container
- Simulate invoices
- Understand the Customizing steps for invoice printing
Lesson 1: SD Billing

Lesson Objectives
After completing this lesson, you will be able to:

- Describe basic processes in sales and distribution billing
- Understand document integration between SD and Convergent Invoicing
- Process the document flow from Sales and Distribution into a Convergent Invoicing invoice
Lesson 1: Overview Convergent Invoicing triggered Rating

Lesson Objectives
After completing this lesson, you will be able to:

- Understand new consume-to-cash process rating in convergent invoicing
- Understand new Master Data Structures Provider Contract as a prerequisite for Data Storage
- Understand Rating Process triggered by Convergent Invoicing
- Understand how Consumption Item Management extends existing Invoicing Concept

Lesson 2: Consumption Items Convergent Invoicing

Lesson Objectives
After completing this lesson, you will be able to:

- Understand consumption item
- Understand Master Data for Consumption Items
- Understand Fields in Consumption Items
- Create Consumption Items for Provider Contracts
- Understand where consumption items can be find
- Understand correction workbench to create consumption items

Lesson 3: Convergent Invoicing Triggered Rating

Lesson Objectives
After completing this lesson, you will be able to:

- Understand process steps in convergent invoicing triggered rating
- Execute Rating Process for Consumption Items that belong to your master data

Lesson 4: Customizing of Data Storage and Rating in CI

Lesson Objectives
After completing this lesson, you will be able to:
• Understand how to create consumption item classes
Lesson 1: Revenue Sharing & Partner Settlement Process

Lesson Objectives
After completing this lesson, you will be able to:

- Understand Convergent Invoicing functionality for Revenue Sharing & Partner Settlement
- Understand Process steps in Revenue Sharing and Partner Settlement
- Understand Partner Agreement with Invoicing Rule
- Control dependence of Customer Payment with Shared Revenue Payouts

Lesson 2: Revenue Sharing & Partner Settlement Customizing

Lesson Objectives
After completing this lesson, you will be able to:

- Understand activation of interfaces in consumption item and billable item classes
- Understand Customizing for Partner Settlement Rule
- Understand Customizing for Partner CIT creation
- Understand Customizing in FI-CA for Adjustments
Lesson 1: Overview Master Agreement

Lesson Objectives
After completing this lesson, you will be able to:

- Understand new master data and master agreements
- Understand which B2B Processes are supported by the new Master Data
- Understand Invoice Agreement and Invoice List Agreement
- Understand Complex Discounting with Master Agreement
- Explain the function of the master agreement master data in SAP ERP Contract Accounts Receivable and Payable (FI-CA)
- Understand Billing and Invoicing with a reference to Master Agreement

Lesson 2: Invoice Agreements and Invoice List Agreements

Lesson Objectives
After completing this lesson, you will be able to:

- Understand the function of invoice agreements
- Understand function of Invoice List Agreements
- Understand Product Group in Master Agreements
- Analyze the results of billing and invoicing regarding invoice agreement usage in master agreements
- Understand Filter Technologie
- Maintain Master Agreement with Invoice Agreement and create invoice

Lesson 3: Complex Discounting

Lesson Objectives
After completing this lesson, you will be able to:

- Understand complex discounting in master agreement
Lesson 1: SAP Fiori

Lesson Objectives
After completing this lesson, you will be able to:

- Explain SAP Fiori Application and Tools
Lesson 1: Mass Activities

Lesson Objectives
After completing this lesson, you will be able to:

- Understand Convergent Invoicing use of Mass Activities
- Understand process steps in use of Mass Activities
- Understand how to monitor Mass Activities