TM: Managing Forwarding Orders

You can use this business process to create and edit a forwarding order in SAP Transportation Management (SAP TM). A forwarding order in SAP TM is an order given by a customer to a logistics service provider (LSP). Based on the forwarding order, the transportation activities are planned and executed. The forwarding order is also used for the customer settlement process.
In addition, you can use a forwarding quotation to send an offer to your ordering party. After the ordering party has accepted the quotation, you can create a forwarding order based on it.

Process

The business process in SAP TM runs as follows:

1. Receive a request for quotation (optional)
   To request a forwarding quotation, the customer has the following options:
   - Send an electronic message
   - Write an e-mail
   - Send a request on paper
   - Call the customer service agent of the LSP
2. Create or change a forwarding quotation (optional)
   If the customer requests a forwarding quotation electronically (for example, within a tendering process), you can have the system create it automatically. Alternatively, the customer service agent of the LSP can create and edit a forwarding quotation manually.
   You can specify general data, the validity scope, and quotation item data. In addition, you can determine a route or calculate the charges for the forwarding quotation.
3. Send a forwarding quotation to a customer (optional)
   You can send the forwarding quotation to your ordering party and print out the document immediately or after previewing it.
4. Receive acceptance or rejection of a forwarding quotation (optional)
   If the ordering party has accepted the forwarding quotation, you can create a forwarding order based on it. Otherwise, you can cancel the forwarding quotation.
5. Request a forwarding order (optional)
   To request a forwarding order, the customer has the following options:
   - Send an electronic message
   - Write an e-mail
   - Send a request on paper
   - Call the customer service agent of the LSP

   If the customer service agent of the LSP receives the request for the forwarding order electronically, the forwarding order is created directly in the SAP TM system of the LSP (using a B2B service).
6. Create or change a forwarding order
   If the forwarding order is created automatically on the basis of an electronic message, the customer service agent of the LSP reviews it and changes the field entries as appropriate. If the forwarding order is received by e-mail, on paper, or by phone, the customer service agent of the LSP creates the forwarding order manually in the system. To create a forwarding order manually, you have the following options:

- Create the forwarding order without reference to a template or an existing document
  You create the forwarding order by entering all data manually.
- Create the forwarding order from a template
  You create the forwarding order from an existing template. This is mainly used for recurring business processes. You can then adjust some of the data manually.
- Create the forwarding order by copying an existing document
  You can use the copy feature to copy an existing forwarding order. The system copies the data from the original to the new forwarding order. You can then adjust the data manually.
- Create the forwarding order from a forwarding agreement
  You can create a forwarding order from a forwarding agreement or with reference to the forwarding agreement. Service items in the forwarding agreement are then also available in the forwarding order. In addition, further information from the forwarding agreement is automatically transferred to the forwarding order, such as the transportation mode, shipping type, and sales organization.
- Create the forwarding order from a forwarding quotation
  You first create a forwarding quotation and then use the data entered there to create a forwarding order.
- Create the forwarding order and subsequently assign a forwarding quotation
  You can first create a forwarding order and then, as a subsequent step, assign an existing forwarding quotation to it. You can copy the charges from the forwarding quotation to the forwarding order.

7. Send a confirmation (optional)
   After having adjusted the forwarding order to meet the customer's requests, the customer service agent can send a forwarding order confirmation to the customer. The forwarding order confirmation sets the status of the forwarding order to *Confirmed*.
8. Create the documents required for import and export processing (optional)
   Based on the data of the forwarding order, you can create the report documents that are required by the legal authorities for import and export processing.
9. Create a freight unit (optional)
   A freight unit is the entity on which the physical transportation activities are performed. Based on a profile, which you can assign to the forwarding order type, the system creates one freight unit or a set of freight units. You specify the rules for creating freight units in the profile. You have the following options:
   - Create freight units automatically
     If you select the option *Create FU automatically*, the system creates the freight units according to the profile settings when it saves a forwarding order of the corresponding type.
   - Create freight units manually
     If you have not marked the forwarding order type for automatic freight unit creation, you must create the freight units by triggering a follow-up action from the forwarding order. You can also create the freight units by running a regular batch job.
10. Start planning
    In this process step, the freight units that have been created in the preceding step are selected for transportation planning activities. You have the following options:
    - You can call the planning screen (transportation cockpit) directly from the forwarding order by triggering a follow-up action. You can then start working on the planning activities.
    - You can assign the freight units in the stage view of the forwarding order to existing freight orders or freight bookings.
    - You can create new freight orders or freight bookings from the stage view of the forwarding order and assign the freight units to them.

- If planning is carried out centrally, you can start the planning process by opening the transportation cockpit independently of the forwarding order. There, transportation planners can select their specific planning worklists based on certain profile settings.

11. Create or change existing documents (optional)
    If the planning process or other activities require existing business documents to be updated, the customer service agent performs the required actions. These can include sending a new confirmation to the customer or starting follow-up processes, such as Tendering Freight.