

SD Case Study

This case study explains an integrated sales and distribution process in detail and thus fosters a thorough understanding of each process step and underlying SAP functionality.

Product

SAP ERP
G.B.I.
Release 6.0

Level

Undergraduate
Graduate
Beginner

Focus

SD

Author

Steve Tracy
Bret Wagner
Stefan Weidner

Version

2.0

MOTIVATION

The data entry requirements in the sales & distribution exercises (SD 1 through SD 7) were minimized because much of the data was stored in the SAP system. This stored data, known as master data, simplifies the processing of business transactions. In the sales order process, we used master data about customers, materials (the products we sold) and pricing to simplify the sales order process.

In this case study, we will create the master data for a new customer.

PREREQUISITES

Before you use this case study, you should be familiar with navigation in the SAP system.

In order to successfully work through this case study, it is not necessary to have finished the SD exercises (SD 1 through SD 7). However, it is recommended.

NOTES

This case study uses the Global Bike Inc. (G.B.I.) data set, which has been created exclusively for SAP UA global curricula.

Create New Customer

Task Create a new customer.

Time 10 min

Short Description Use the SAP Easy Access Menu to create a new customer.

In this case study, we will create the master data for a new customer. Two types of customer data are stored about a customer – sales data and accounting data. The customer master data is created in three groups, or views – general, accounting, and sales. Customers can be created centrally, meaning that all views are generated concurrently, or responsibility can be distributed so that different personnel in the accounting and sales areas are responsible for creating and maintaining the data in their respective views. For this exercise, central creation will be used to enter all of the needed data to define a new customer.

To create a new customer, follow the menu path:

Menu path


Logistics ▶ Sales and Distribution ▶ Master Data ▶ Business Partner ▶ Customer ▶ Create ▶ Complete

This will produce the following screen.

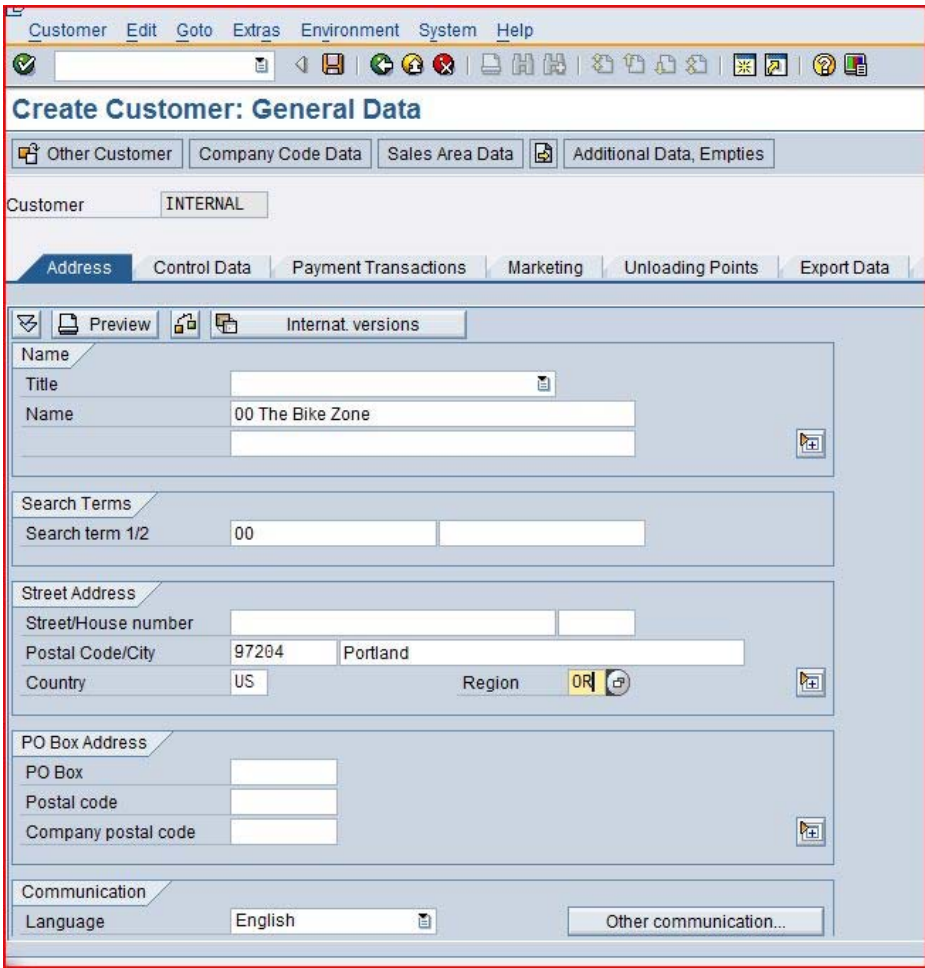
The screenshot shows the 'Customer Create: Initial Screen' in SAP. The interface includes a menu bar at the top with options like 'Customer', 'Edit', 'Goto', 'Extras', 'Environment', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main area is divided into several sections:

- Account group:** A dropdown menu set to 'Sold-to party'.
- Customer:** An empty text input field.
- Company code:** A text input field containing '00A1'.
- Sales area:** A section containing:
 - Sales Organization:** '00A1'
 - Distribution Channel:** 'WH'
 - Division:** '01' with a selection icon.
- Reference:** A section with five rows of input fields:
 - Customer:** An empty text input field.
 - Company code:** An empty text input field.
 - Sales organization:** An empty text input field.
 - Distribution channel:** An empty text input field.
 - Reference division:** An empty text input field.


At the bottom of the screen, there are two buttons: 'All sales areas...' and 'Customer's sales areas...'. A toolbar at the very bottom contains icons for 'Save', 'Cancel', 'Back', 'Forward', and 'Close'.

Select **Sold-to Party** for the account group. Enter **##A1** for Company code, **##A1** for Sales Organization, **WH** for Distribution Channel, and **01** for Division. After clicking on , the following screen will appear.

##A1
##A1
WH
01

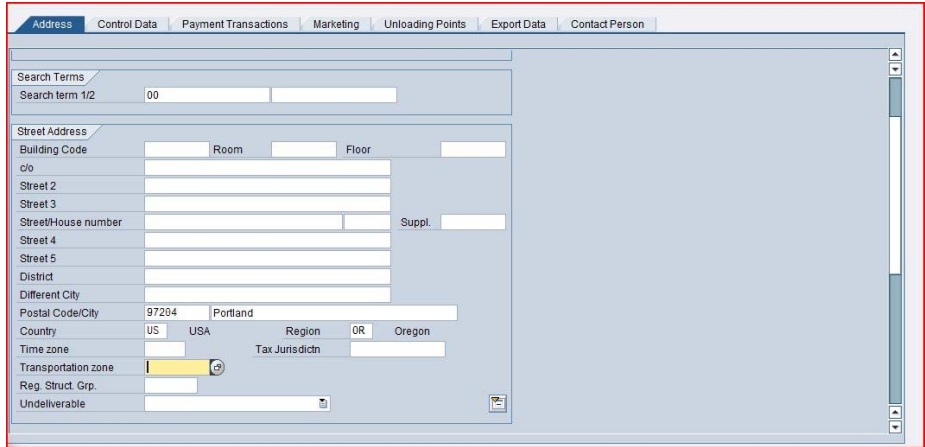


The screenshot shows the 'Create Customer: General Data' window in SAP. The 'Customer' type is 'INTERNAL'. The 'Name' field is filled with '00 The Bike Zone'. The 'Search Terms' section has 'Search term 1/2' set to '00'. The 'Street Address' section has 'Postal Code/City' as '97204 Portland' and 'Country' as 'US' with 'Region' set to 'OR'. There are expand icons next to the Name, Street Address, and PO Box Address sections.

Enter **## The Bike Zone** for Name, **##** for Search term 1, **97204** for Postal Code, **Portland** for City, **US** for Country, and **OR** for Region. Then click on the expand icon  to access additional street address fields.

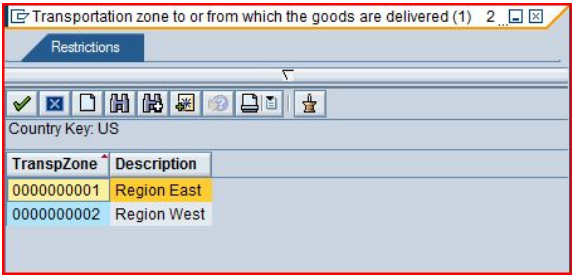
The Bike Zone

97204 Portland
US
OR



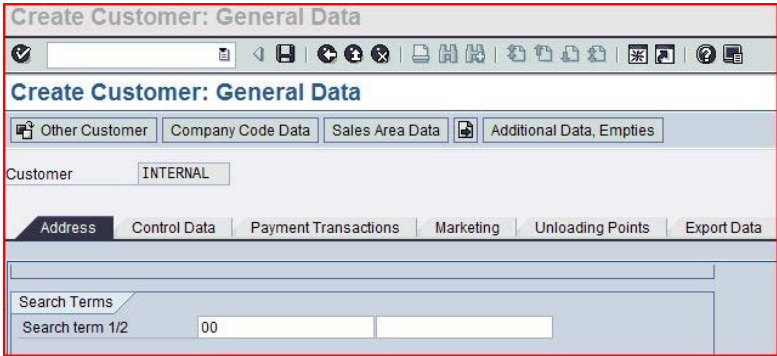
This screenshot shows the expanded 'Street Address' section. It includes fields for 'Building Code', 'Room', 'Floor', 'Street 2', 'Street 3', 'Street 4', 'Street 5', 'District', 'Different City', 'Postal Code/City' (97204 Portland), 'Country' (US), 'Region' (OR), 'Time zone', 'Transportation zone', 'Reg. Struct. Grp.', and 'Undeliverable'. A search icon is visible next to the 'Transportation zone' field.

Scroll down and click on the search icon next to the Transportation Zone field. This will produce the following pop-up window.

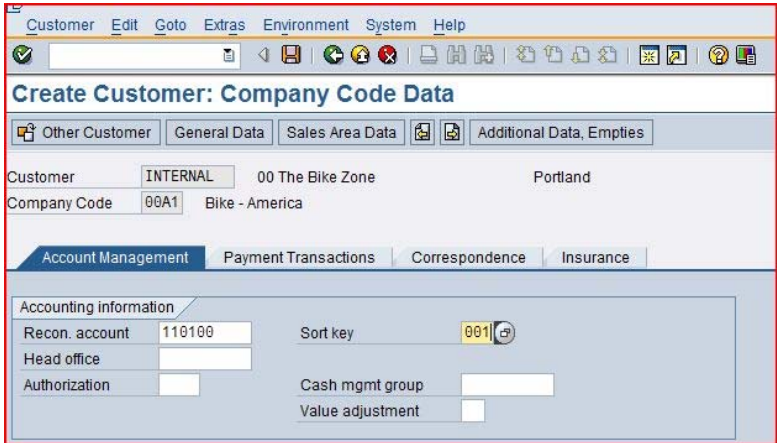


Double-click on Region West to select it.

Region West



Clicking on Company Code Data will produce the following screen.



Enter **1101##** for Recon. account (reconciliation account), **001** for Sort key. Then click on the Payment Transactions tab.

1101##
001



After entering **0001** for Terms of payment and clicking on the **Sales Area Data** icon, the following screen will appear.

0001

The screenshot shows the SAP Sales Area Data screen with the following fields:

- Sales order**
 - Sales district: []
 - Sales Office: []
 - Sales Group: []
 - Customer group: []
 - ABC class: []
 - Currency: **USD** United States Dollar
 - Switch off rounding
 - Product attributes: []
 - Order probab.: **100** %
 - AuthorizGroup: []
 - Item proposal: []
 - Acct at cust.: []
 - UoM Group: []
 - Exch. Rate Type: []
 - PP cust. proc.: []
- Pricing/Statistics**
 - Price group: []
 - Cust.pric.proc.: **1** Standard
 - Price List: []
 - Cust.Stats.Grp: **1** []

Make sure **USD** is entered for Currency and **1** is entered for Cust.pric.proc. Enter **1** for Cust.Stats.Grp, then click on the **Shipping** tab. Fill in the following data.


USD
1
1

The screenshot shows the SAP Shipping tab with the following fields:


- Shipping**
 - Delivery Priority: **02**
 - Shipping Conditions: **01**
 - Delivering Plant: **00A2**
 - Relevant for POD
 - POD timeframe: []
 - Order Combination
- Partial deliveries**
 - Complete delivery reqd by law
 - Partial delivery per item: [] Partial delivery allowed
 - Max. partial deliveries: **3**
 - Unlimited tol.
 - Underdel. Tolerance: []
 - Overdeliv. Tolerance: []


Enter **02** (normal) for Delivery Priority, **01** (standard) for Shipping Conditions, **##A2** for Delivering Plan, and **3** for Max. partial deliveries. Then click on the Billing Documents tab and fill in the following data.

02
01
##A2
3

Enter **FOB** and **Origin Shipping Dock** for Incoterms, **0001** for Terms of payment, **01** for Acct.assgmt group and **0** for Tax classification for all three categories. Then click on the save icon . The SAP system will create the master record for the new customer and assign the customer a unique customer number.

FOB
Origin Shipping Dock
0001
01
0

 Customer 0000000306 has been created for company code 00A1 sales area 00A1 WH 01

Click on the cancel icon  to return to the SAP Easy Access screen.



Create Contact Person for Customer

Task Create a contact person for a customer.

Time 5 min

Short Description Use the SAP Easy Access Menu to create a contact person.

Now that we have created the master data for our new customer, **The Bike Zone**, we can create the master data for a contact person. A contact person is a subordinate of the new customer's company. The contact person defines a specific person to communicate with when dealing with The Bike Zone.


To create a contact person, follow the menu path:

Menu path

Logistics ► Sales and Distribution ► Master Data ► Business Partner ► Contact Person ► Create

This will produce the following screen.



If your customer number is not entered by default, then search for your customer using the **Customers (by company code)** tab. Then click on  which will produce the following screen.

Customer 306 00 The Bike Zone Portland

Contact person NEW 001

VIP 1 Gender unknown

Department 0002 Date of birth

Function 02 Marital Status

Power of att.

Higher partner

Rep. number

Call frequency 0002 Advertising mat

Buying habits

Remarks

Preview

Person

Title

Last name Jones

First name James

Academic Title

Format

Function

Department

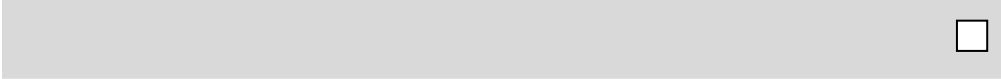
Room Number Floor Building

Enter **1** for VIP (management), **0002** for Department (purchasing), **02** for Function (head of purchasing), and **0002** for call frequency (weekly). Enter whatever name you wish, and fill in any other data you like, then click on . Your contact person will be given a unique number.

1
0002
02
0002

Contact person 0000023215 created for customer 0000000306

Click on the exit icon to return to the SAP Easy Access screen.



Change Customer

Task Change a customer.

Time 5 min

Short Description Use the SAP Easy Access Menu to change a customer.

The contact person created for The Bike Zone needs to be assigned as a business partner within the customer master.

To change the customer master data, follow the menu path:

Menu path

Logistics ▶ Sales and Distribution ▶ Master Data ▶ Business Partner ▶ Customer ▶ Change ▶ Sales and Distribution

This will produce the following screen.

Sales document Edit Goto Environment System Help

Create with Reference Sales Item overview Ordering party

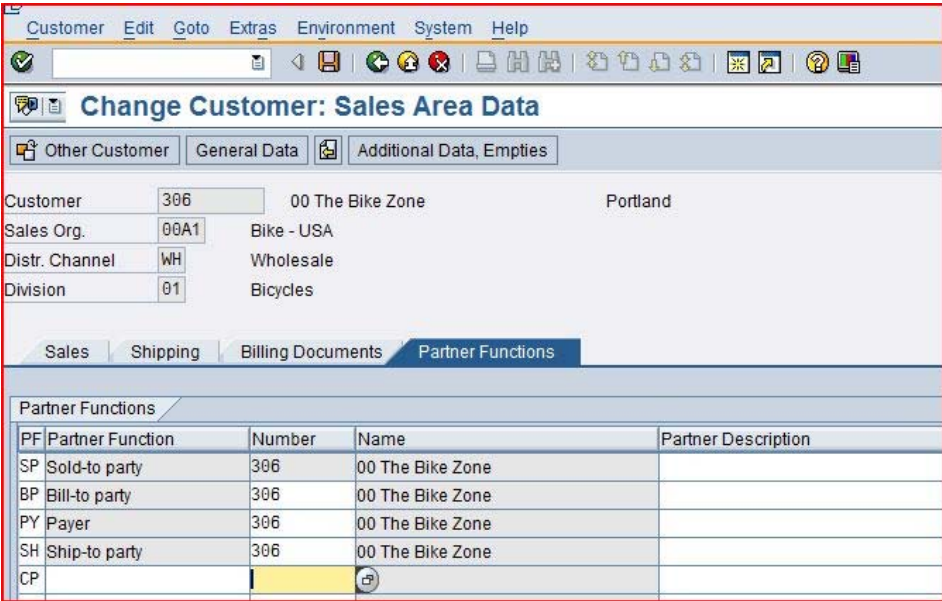
Inquiry Type IN


Organizational Data

Sales Organization	00A1
Distribution Channel	WH
Division	01
Sales Office	
Sales Group	

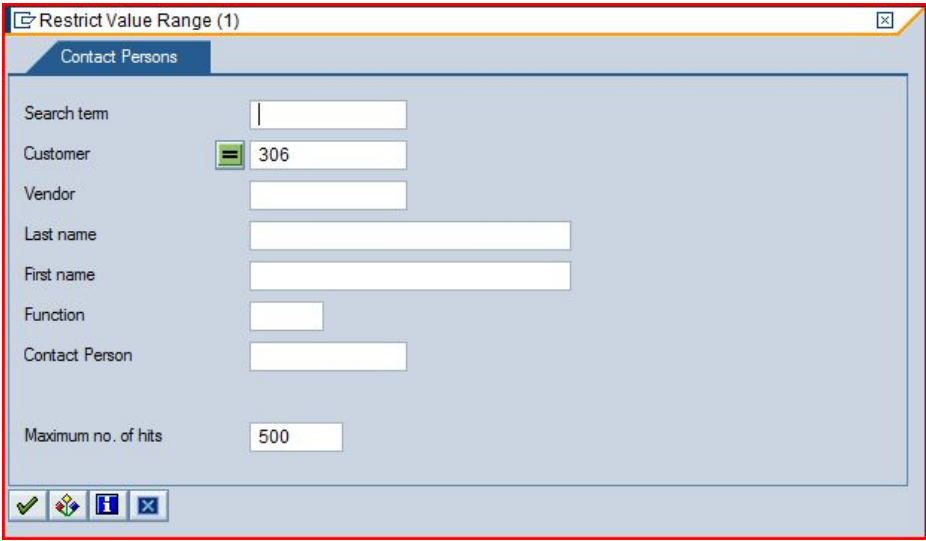
If the customer number is not entered by default, search for it using the search tab **Customers (by company code)**. Make sure that following values are entered: **##A1** for Sales Organization, **WH** is entered for Distribution Channel, and **01** for Division. Then click on and the following screen will appear.


##A1
WH
01

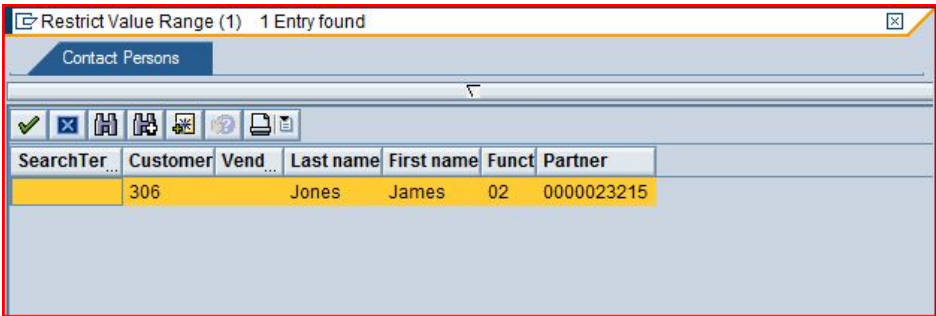



Click on the **Partner Functions** tab, then enter **CP** for PF (partner function). Then click on the number field and click on the search icon , which will bring up the following search window.

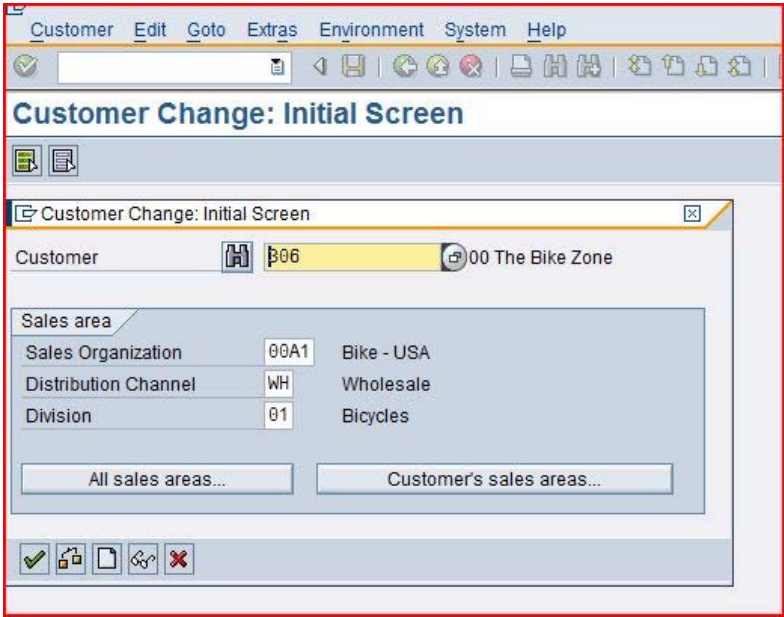
CP




Your customer number is entered automatically. Click on the enter icon  to begin the search and find your newly created contact person.



Double-click on the partner to enter the partner number. Click on  to save.



Click on the cancel icon  to return to the SAP Easy Access screen.



Create Customer Inquiry

Task Create a customer inquiry.

Time 10 min

Short Description Use the SAP Easy Access Menu to create a customer inquiry.

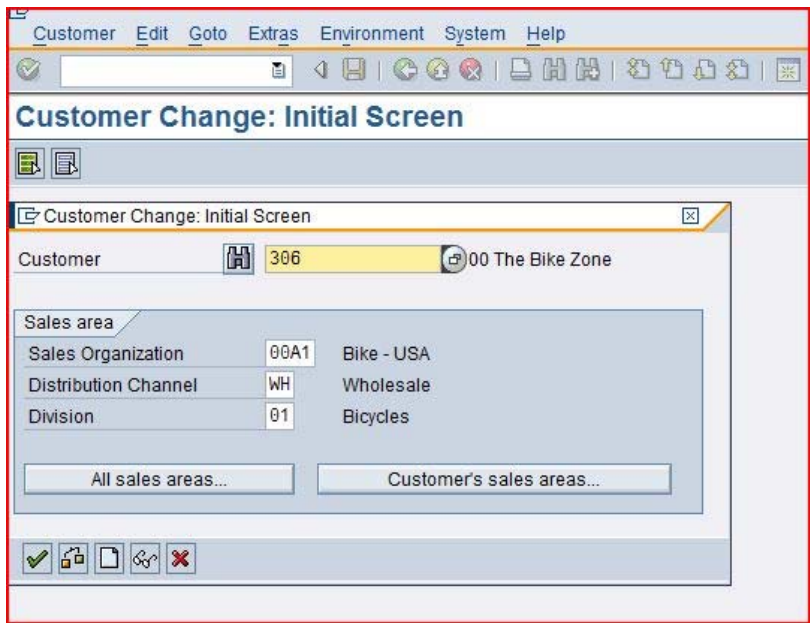
Now we will enter an inquiry from our new customer, The Bike Zone. An inquiry is a customer's request to be provided with a quotation or sales information without obligation. An inquiry can relate to materials or services, conditions, and if necessary delivery dates.

To create an inquiry, follow the menu path:

Menu path

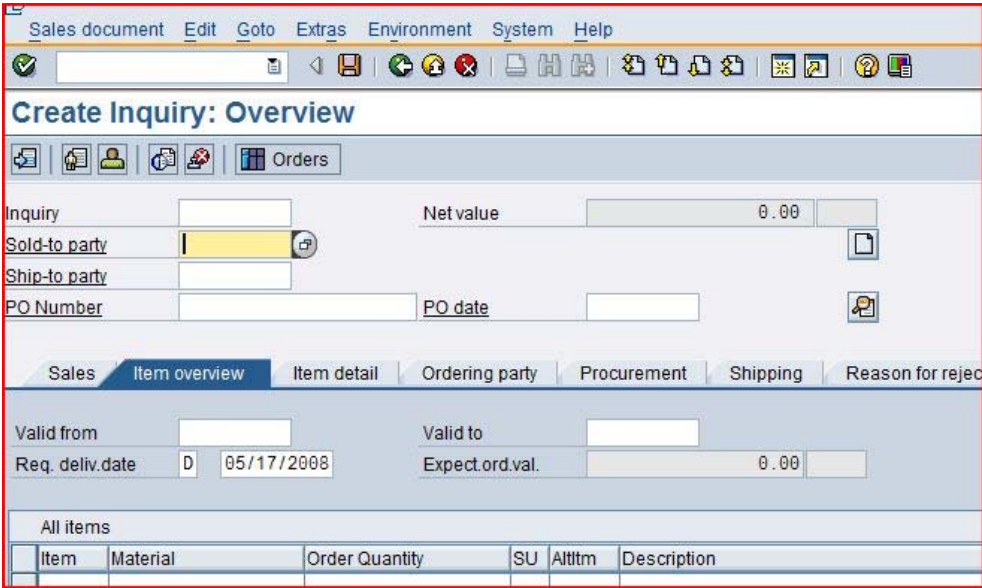
Logistics ► Sales and Distribution ► Sales ► Inquiry ► Create


This will produce the following screen.

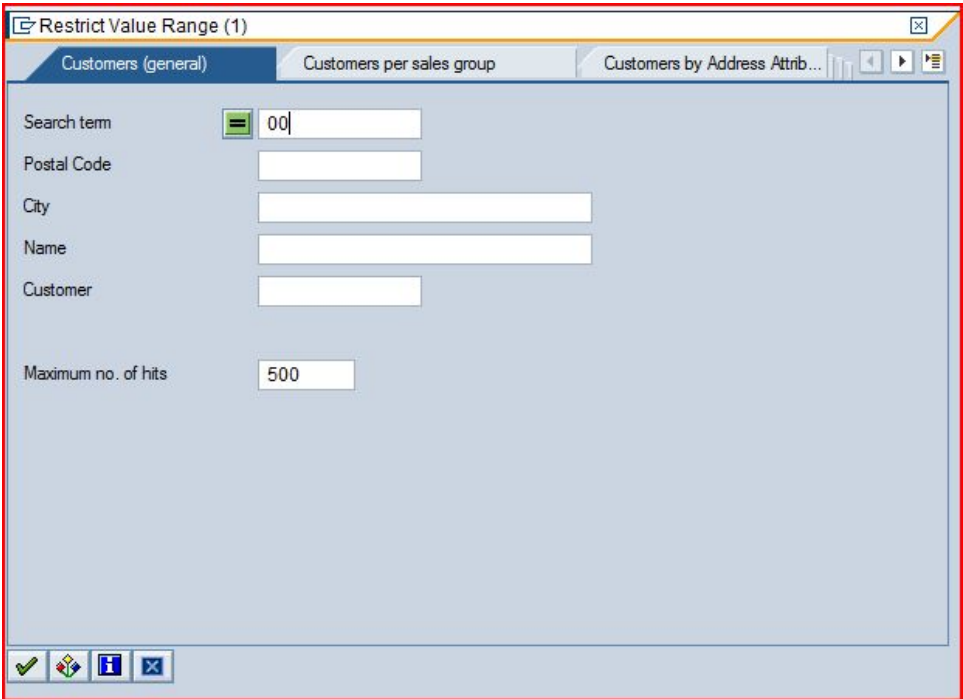


Enter the following information: **In** for inquiry, **##A1** for Sales Organization, **WH** for Distribution Channel, **01** for Division. Then click on . This will produce the following screen.


IN
##A1
WH
01



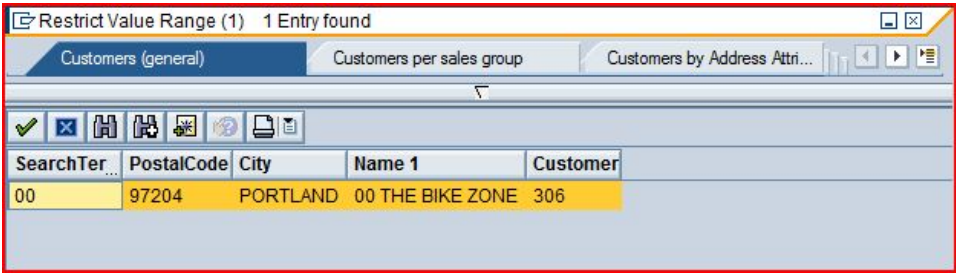
Click on the **Sold-to party** field, then click on the search icon , which will bring up the following search screen.



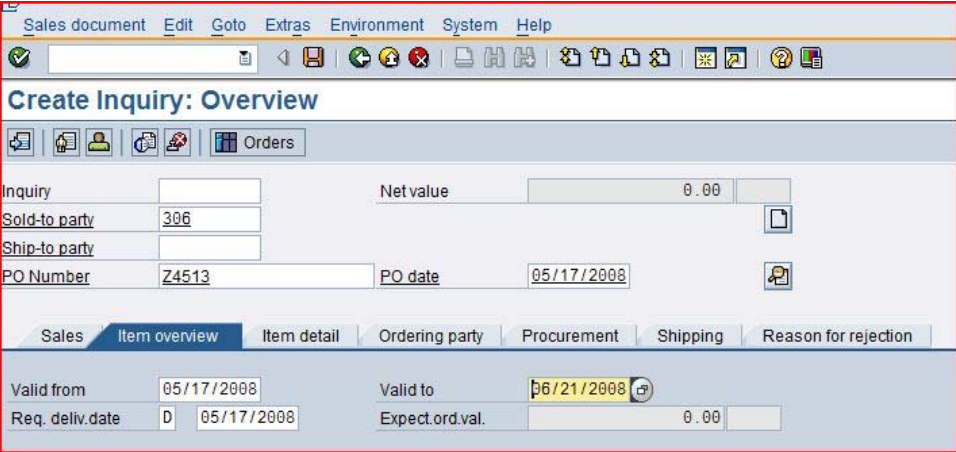
Because we have defined a search term when we created our new customer, we can now use it to find The Bike Zone.

Click on the **Customers (general)** tab, enter **##** for search term, then click on the enter icon . This will produce the new customer.


##

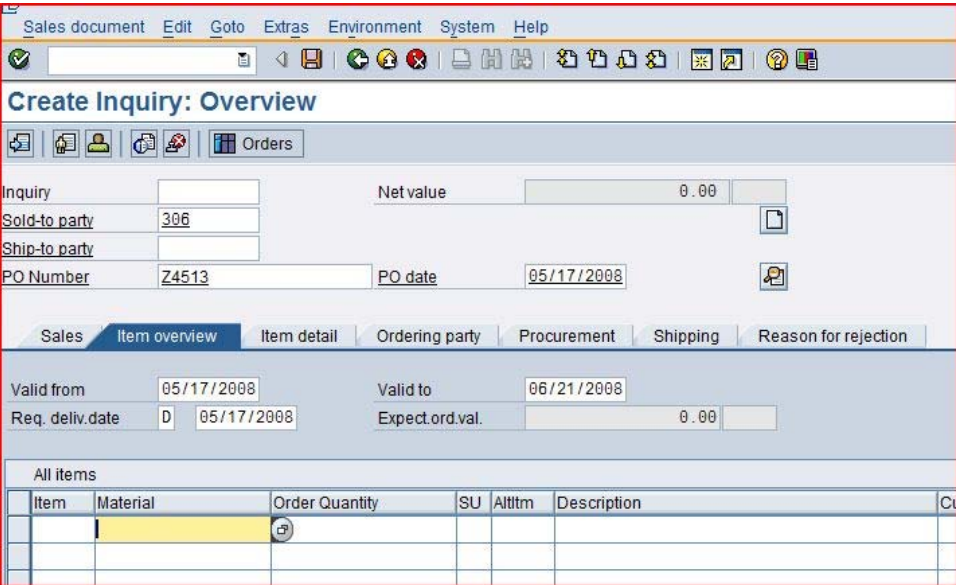


Double-click on **The Bike Zone** to select it.



Enter any number for PO Number, today’s date for the PO date (use F4/F2), today’s date for the Valid from date (use F4/F2) and a date one month from today for the Valid to date (use F4, then select the date).

The Bike Zone wants a quote on two products – the Mekena and the Star Lady Bike 28”. To find these products, we need to use the search function. Click on the material field, then click on the search icon .



Clicking on the search icon will produce the following search window.

Select the tab **Sales material by description**, enter Sales Organization **##A1** and Distribution Channel **WH**, then click on to get the list of bicycles.


##A1
WH

Material description	Language	SOrg.	DChl	Material
7 GEAR BIKE	EN	00A1	WH	CB-0010-00
AC DS 1	EN	00A1	WH	MB-0012-00
ALULITE 8	EN	00A1	WH	CB-0014-00
BACKFIRE 40	EN	00A1	WH	MB-0013-00
BELUGA SPEED	EN	00A1	WH	RB-0013-00
BIKES CITY	EN	00A1	WH	CB-0013-00
CONCEPTION PALERMO	EN	00A1	WH	CB-0012-00
CRUZE BIKE	EN	00A1	WH	KB-0012-00
DEVIL	EN	00A1	WH	RB-0012-00
DISNEY BIKE	EN	00A1	WH	KB-0011-00
FINISHED BIKE	EN	00A1	WH	FG-0010-00
JAKIMA	EN	00A1	WH	TB-0011-00
KIDS 10	EN	00A1	WH	KB-0010-00
M6 HARDTAIL 18	EN	00A1	WH	MB-0014-00
MEKENA	EN	00A1	WH	KB-0013-00
MONACO MEN RAHMEN	EN	00A1	WH	TB-0013-00
MTB LIGHT V-BRAKE	EN	00A1	WH	MB-0010-00
OCR 1.0	EN	00A1	WH	RB-0014-00
RACE SCANDIUM	EN	00A1	WH	RB-0011-00
SE 9000 DISC	EN	00A1	WH	MB-0011-00
SOLERO MEN	EN	00A1	WH	TB-0012-00
STAR LADY BIKE 28	EN	00A1	WH	TB-0014-00
STREAM N3 28	EN	00A1	WH	CB-0011-00
STREETMAX	EN	00A1	WH	KB-0014-00
VIA NIRONE 7	EN	00A1	WH	RB-0010-00
XT PRO	EN	00A1	WH	TB-0010-00

Double-click on the **Mekena** bike to select it and enter a quantity of **10** pieces.

10

Item	Material	Order Quantity	SU	Altitm	Description
	KB-0013-00	10			

Repeat the process to enter a quantity of 5 of the **Star Lady Bike 28**. Click on the enter icon  to determine the price for this order.


5

Item	Material	Order Quantity	SU	Altitm	Description	Customer Material
10	KB-0013-00	10	ST		Mekena	
20	TB-0014-00	5	ST		Star Lady Bike 28	

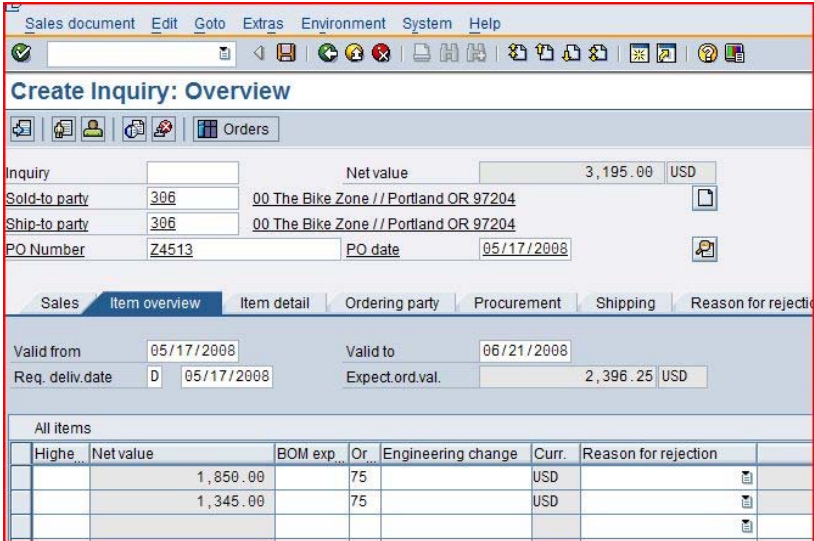
The total price for these 15 bikes to The Bike Zone is 3,195.00, which is given by the net value. The Expect.ord.val (958.00) is a calculated value which takes the net value of the order and multiplies it by the probability of having an inquiry from this customer turn into an actual order. Use the scroll icon to get to the Order probability column.

High...	Net value	BOM exp...	Or...	Engineering change	Curr.	Reason for rejection
	1,850.00		30		USD	
	1,345.00		30		USD	

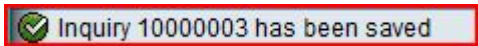
The order probability of 30% is the default value that was set for GBI for inquiry documents. The expected order value is then $0.30 \times 3,195.00 = 958.50$. We can change the order probability for an inquiry, which makes sense as different customer inquiries would have different probabilities of becoming an actual sales order.


Change the order probabilities to 75%, then click on the enter icon  to update the inquiry and note the new Expect.ord.val of 2,396.25.

75



Click on  to save the inquiry. The SAP system will assign a unique number to the inquiry.



Click on the exit icon  to return to the SAP Easy Access screen.

Create Customer Quotation

Task Create a customer quotation.

Time 10 min

Short Description Use the SAP Easy Access Menu to create a customer quotation.

An inquiry presents the terms (price, delivery schedule) to a customer considering a purchase. A quotation is similar, except that it is a legally binding offer for delivering the requested product or services.

The Bike Zone would like a firm quote for the items in the inquiry created before. We can do this easily by copying the details from the inquiry into the new quotation. To do this, follow the menu path:


Menu path


Logistics ▶ Sales and Distribution ▶ Sales ▶ Quotation ▶ Create

This will produce the following screen.

Enter **QT** for Quotation Type, then click on **Create with Reference**. This will produce the following screen.

QT


Make sure the **Inquiry** tab is selected, click on the **Inquiry** field, then on the search icon . This will produce the following search window.

Enter **##A1** for Sales Organization, then click on the enter icon . This will produce a list with the inquiry for The Bike Zone.


##A1


Partn...	Funct	SOrg.	SO...	SGrp	DChl	Dv	SaTy	Purchase order...	Doc. Date	Created by	Valid from	Valid to	TrG	Document
306	SP	00A1		WH	01	IN	Z4513		05/17/2008	BWAGNER	05/17/2008	06/21/2008	1	10000003


Double-click on the inquiry to select it, and the inquiry number will be copied in the **Create with Reference** window.

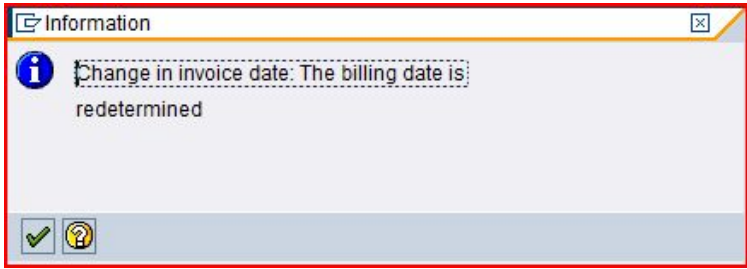
Click on the copy icon  to copy information from the inquiry into the quotation screen.


Item	Material	Order Quantity	SU	Altitm	Description
10	KB-0013-00		10	ST	Mekena
20	TB-0014-00		5	ST	Star Lady Bike 28

Enter a **PO number** of your choice, today's date for the **PO date** (F4/F2), a date one month from today for the **Valid to** date, and a date one month from today for the **Req. deliv.date**. Then click on the enter icon , which will produce the following warning.


 The default date is not copied into existing schedule lines

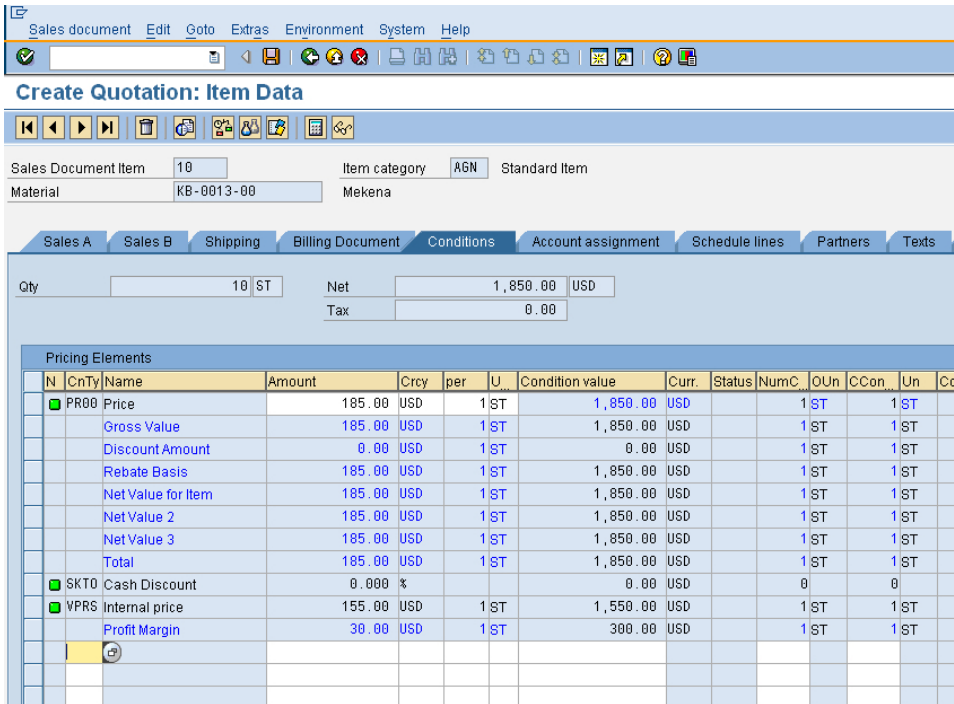
Click on the enter icon  to acknowledge the warning. This will produce an information message.



Click on the enter icon  to acknowledge this information.

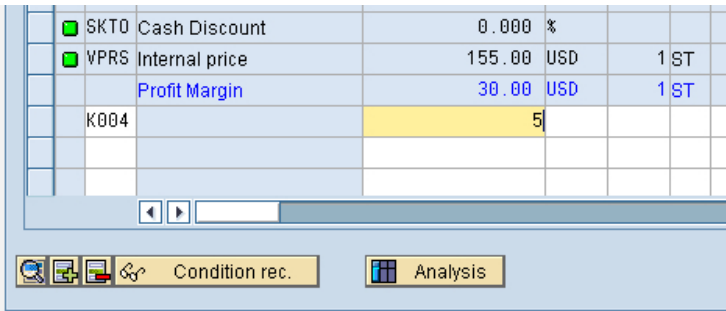
To encourage The Bike Zone to become a loyal customer, you have been authorized to give a \$5.00 discount on each Mekena bike, as well as a 5% discount on the entire order.


To add the \$5.00 to the Mekena bike, select the Mekena line in the order, then click on the Item conditions icon . You will get a screen that shows the pricing details for the Mekena bike.

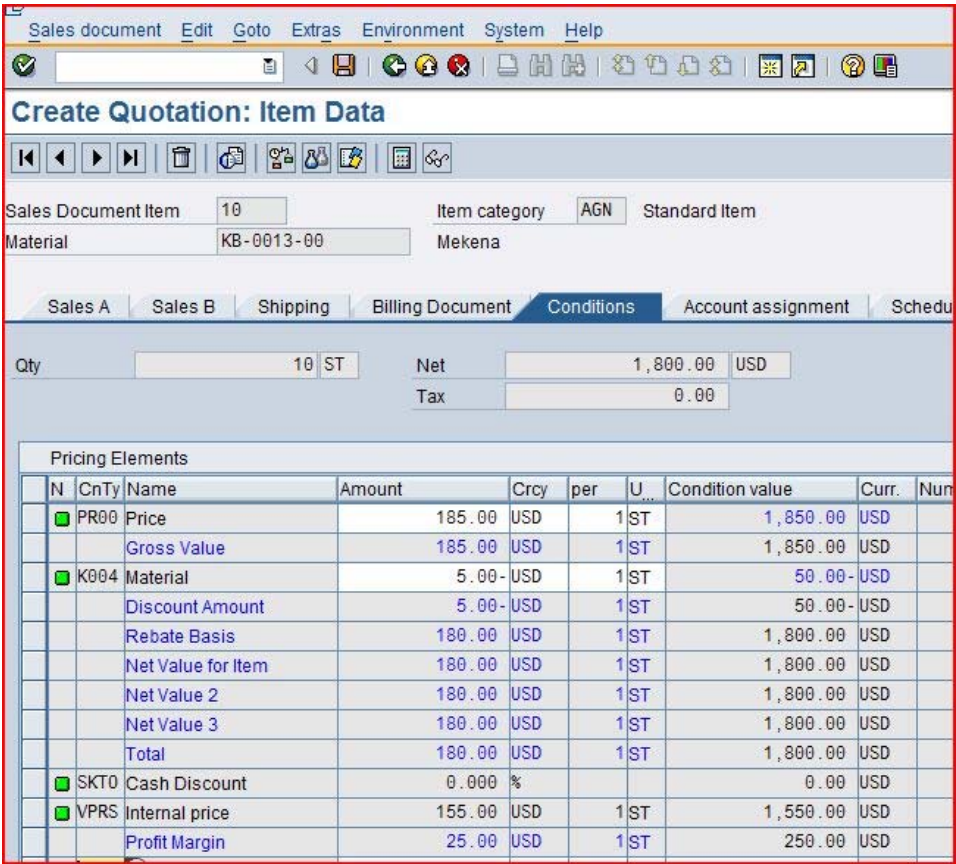


In SAP, pricing is done using conditions. The pricing procedure defines which condition types are to be used to calculate the final price. Condition type PR00 is a gross price condition. To add a discount, we can add condition type **K004** (material discount) with a value of **5** to the pricing procedure.

K004
5




After clicking on the enter icon , a new price for the 10 Mekena bikes will be calculated.



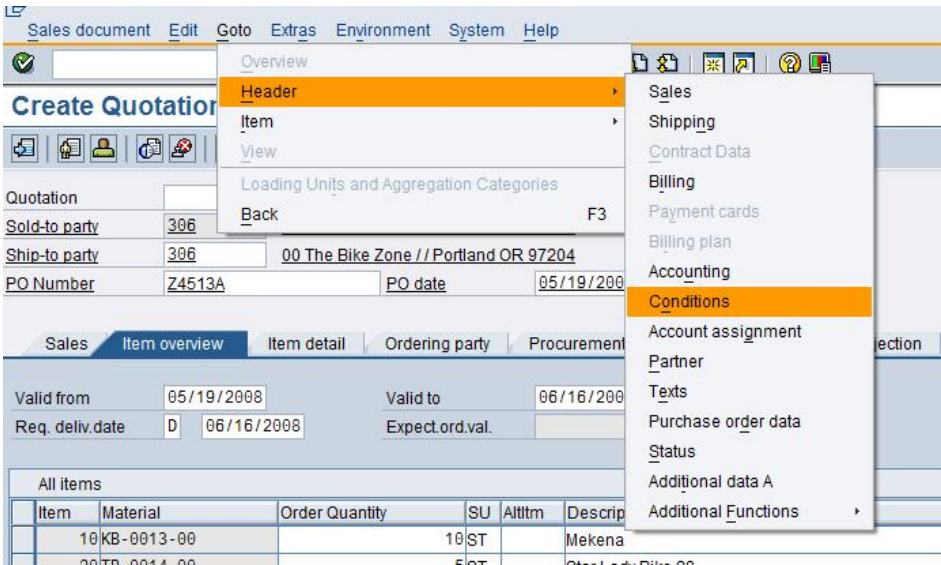
The screenshot shows the 'Create Quotation: Item Data' screen in SAP. The 'Conditions' tab is active, displaying a pricing table with the following data:

N	CnTy	Name	Amount	Crcy	per	U...	Condition value	Curr.	Nun
PR00		Price	185.00	USD	1	ST	1,850.00	USD	
		Gross Value	185.00	USD	1	ST	1,850.00	USD	
K004		Material	5.00	USD	1	ST	50.00	USD	
		Discount Amount	5.00	USD	1	ST	50.00	USD	
		Rebate Basis	180.00	USD	1	ST	1,800.00	USD	
		Net Value for Item	180.00	USD	1	ST	1,800.00	USD	
		Net Value 2	180.00	USD	1	ST	1,800.00	USD	
		Net Value 3	180.00	USD	1	ST	1,800.00	USD	
		Total	180.00	USD	1	ST	1,800.00	USD	
SKT0		Cash Discount	0.000	%			0.00	USD	
VPRS		Internal price	155.00	USD	1	ST	1,550.00	USD	
		Profit Margin	25.00	USD	1	ST	250.00	USD	

Note that the discount is now applied to the order. Click on the back icon  to return to the main quotation screen.

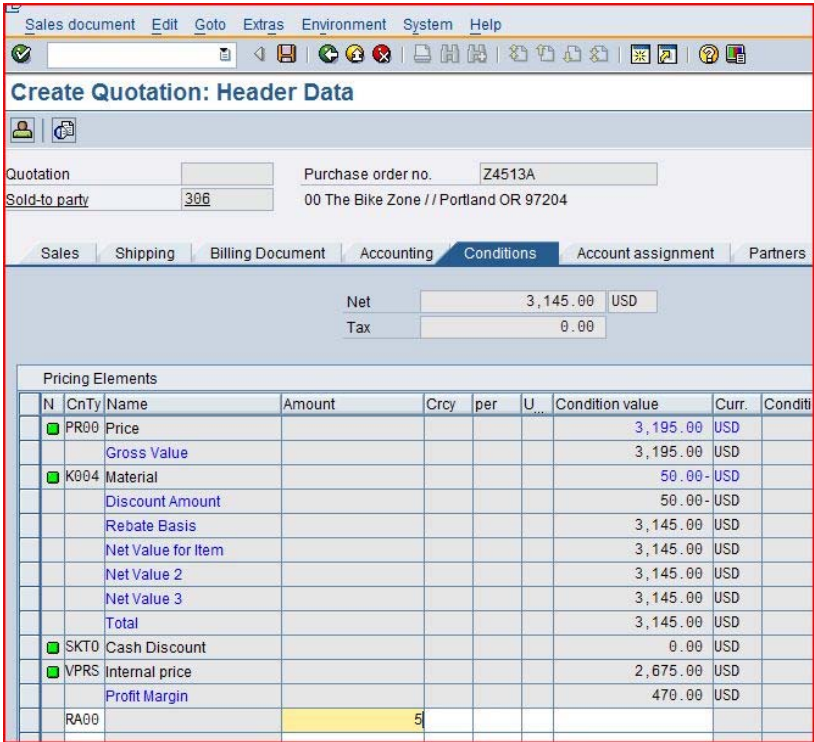
To apply a 5% discount to the entire order, follow the pull-down menu path:

Goto ► Header ► Conditions



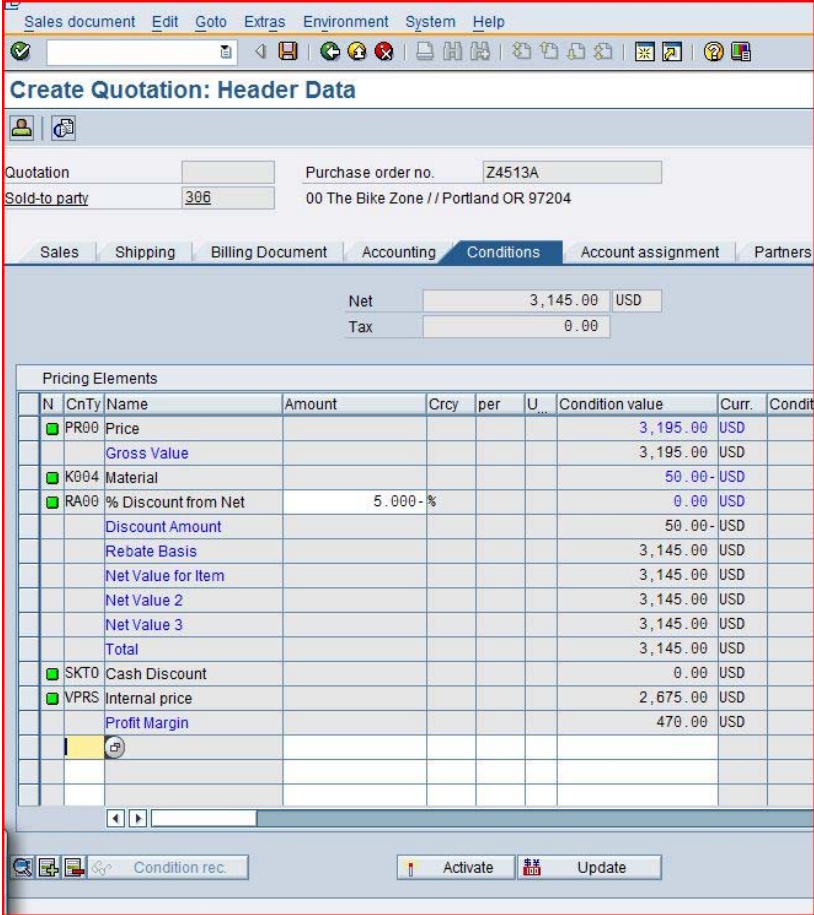
The screenshot shows the 'Create Quotation' screen with the 'Goto' menu open. The 'Header' and 'Conditions' options are highlighted, indicating the navigation path. The background shows the quotation details for 'The Bike Zone // Portland OR 97204'.


This will produce the following screen.

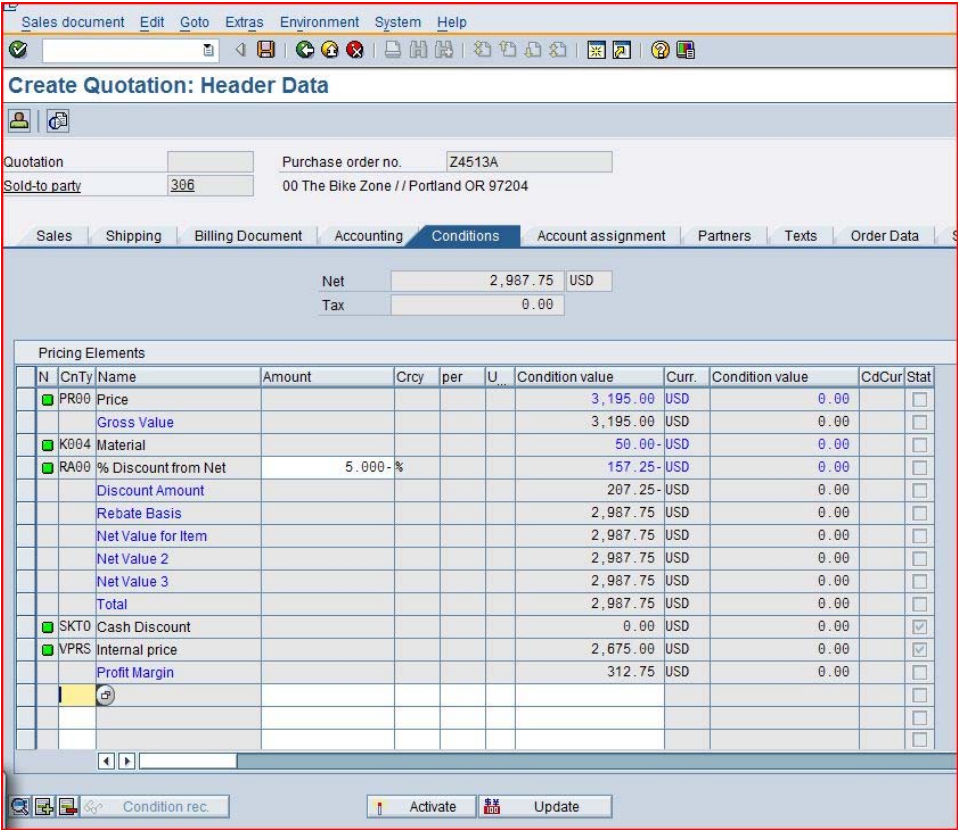


To apply the 5% discount, enter CnTy (condition type) **RA00** (Net Discount) with a value of **5**, then click on . Note that the price does not yet include the 5% discount.

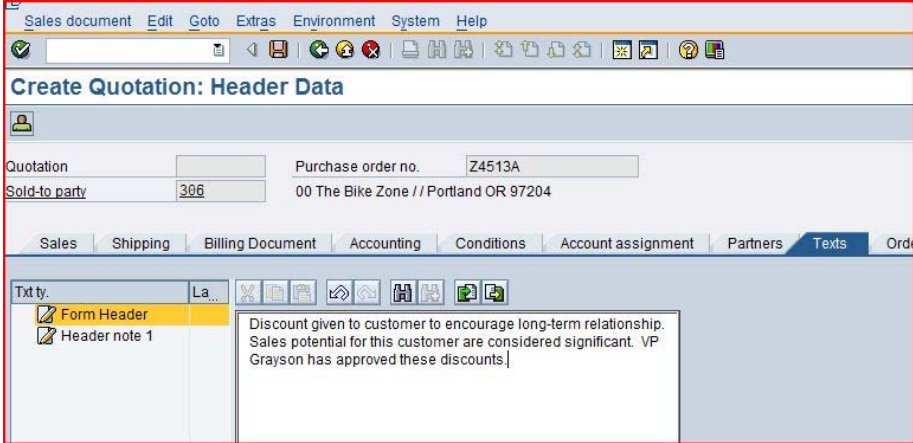
RA00
5





To include the 5% discount, click on the activate icon .



The 5% discount is now applied. Note that it is applied to the price **after** the \$5 discount per Mekena bike. As a final detail, it is good practice to document the reason that these discounts are being given. To do this, click on the **Texts** tab. This produces a screen where notes can be attached to the quotation.



After entering the note to support the discounts, click on  to save the new quotation.

Click on the exit icon  to return to the SAP Easy Access screen.

Create Sales Order Referencing a Quotation

Task Create a sales order with reference to a quotation.

Time 10 min

Short Description Use the SAP Easy Access Menu to create a sales order.

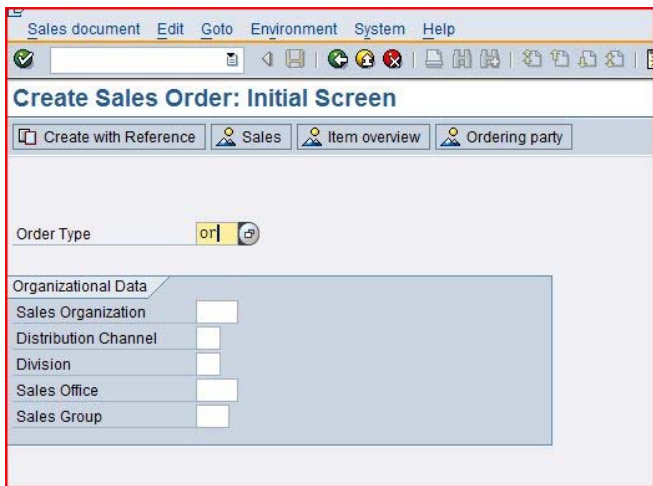
The Bike Zone has agreed to the terms and conditions in the quotation, and wants to order the bikes in the quotation. As a result, we can simplify the order creation process by copying the quotation into a sales order.

To create a sales order, follow the menu path:

Menu path

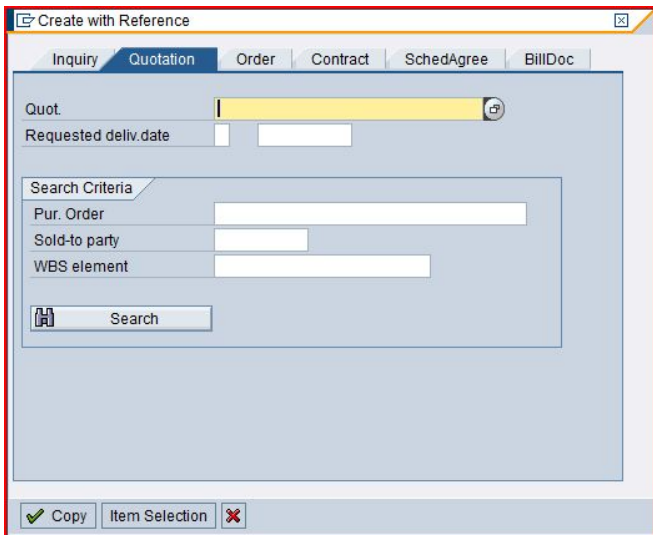
Logistics ▶ Sales and Distribution ▶ Sales ▶ Order ▶ Create


This will produce the following screen.

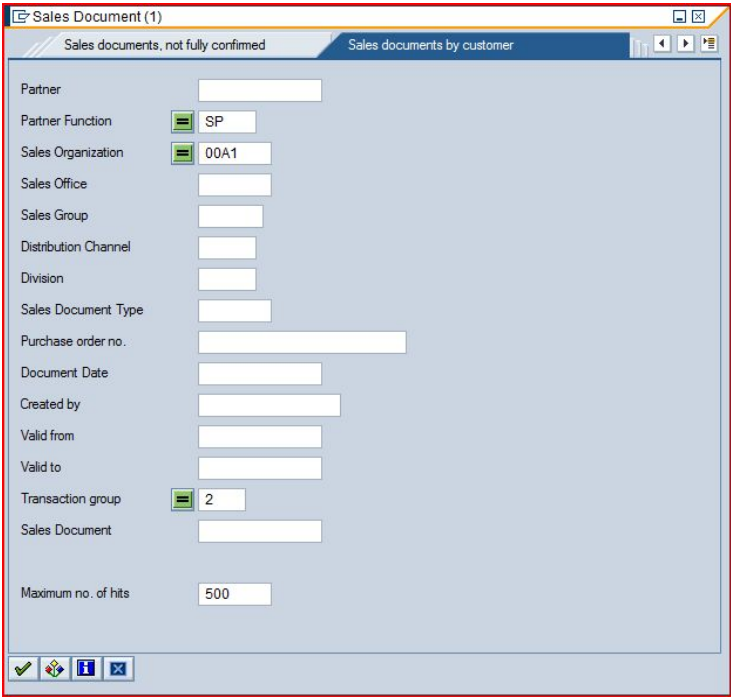



Enter Order Type **OR**, then click on the **Create with Reference** icon. This will produce the following pop-up search window.

OR

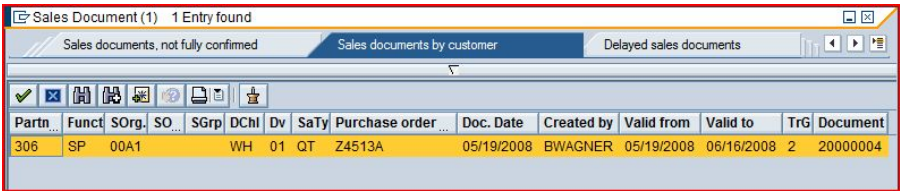


Make sure that the **Quotation** tab is selected, click on the **Quotation** field, then on the search icon . This will produce the following search window.

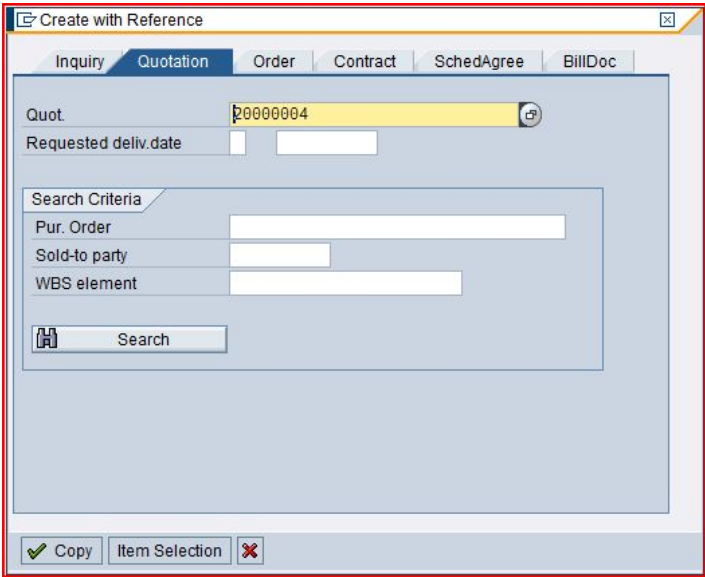



Make sure you select the **Sales documents by customer** tab, enter **##A1** for Sales organization, then click on the enter icon .

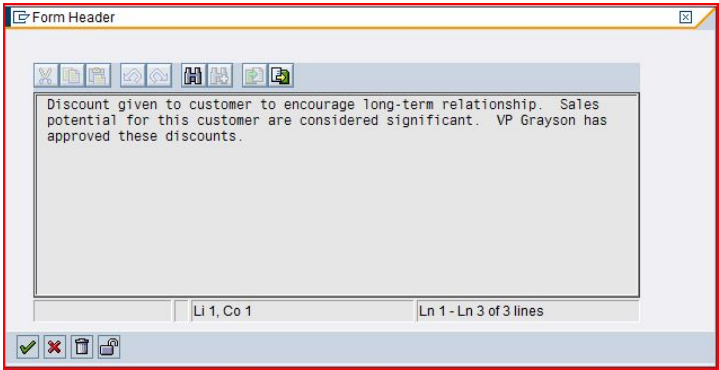
##A1




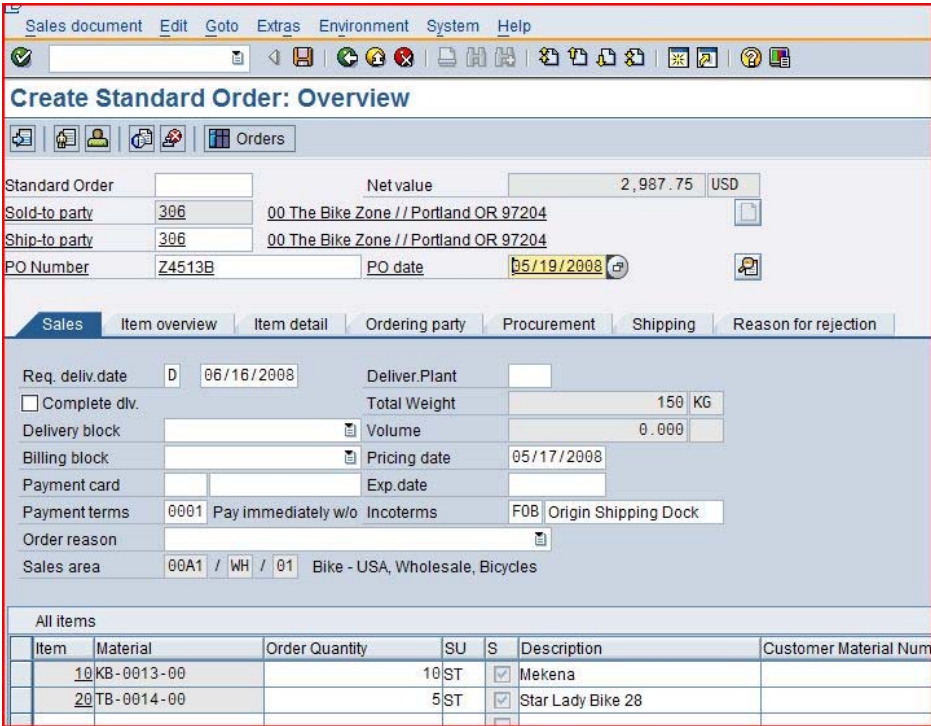
After double-clicking on the quotation, the number for the quotation will be entered into the Create with Reference window.




With the Quotation number entered, click on the copy icon  to copy the information from the quotation into the sales order screen. You will get the following message.




The note that was entered in the header area of the quotation document is displayed as an information message. Click on the enter icon , and the sales order screen will appear.



Enter a PO number and today's date (F4/F2) for the PO date. Note that the Req.deliv.date is copied from the quotation. Click on  to save the sales order. The SAP system will assign a sales order number.



Click on the exit icon  to return to the SAP Easy Access screen.



Check Stock Status

Task Check the inventory.

Time 5 min

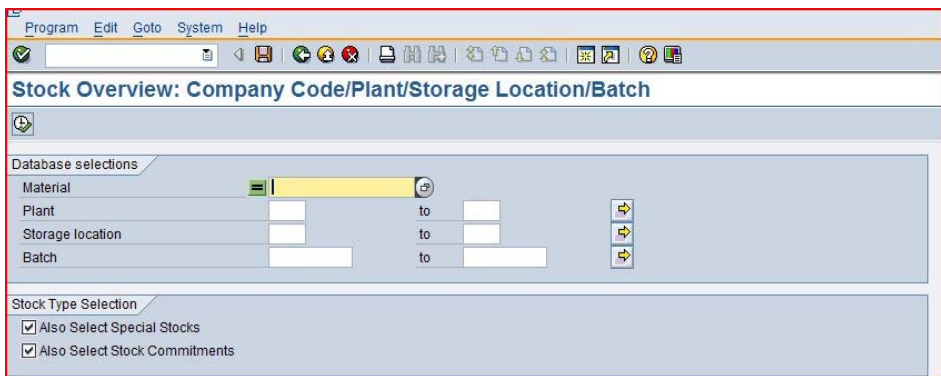
Short Description Use the SAP Easy Access Menu to check the stock status.


We can check on the inventory level of the bikes in the sales order for The Bike Zone. To do this, follow the menu path:

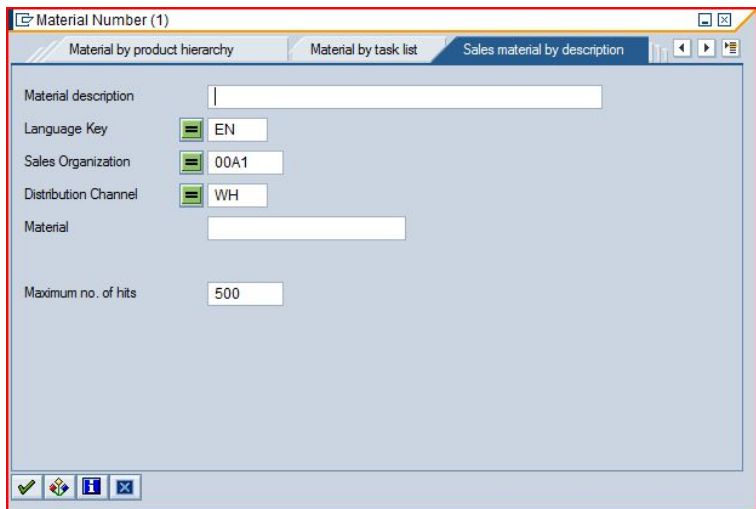
Menu path



Logistics ▶ Materials Management ▶ Inventory Management ▶ Environment ▶ Stock ▶ Stock Overview

This will produce the following screen.



To find the material number for your bikes, click on the **Material** field, then click on the search icon . This will produce the following search screen.



Use the far-right icon  to select the tab **Sales material by description**. Enter **##A1** for Sales Organization, **WH** for Distribution Channel. Then click the enter icon  to find the list of materials.

##A1
WH

Material Number (1) 26 Entries Found

Material by product hierarchy | Material by task list | Sales material by description

Material description	Language	SOrg	DChl	Material
7 GEAR BIKE	EN	00A1	WH	CB-0010-00
AC DS 1	EN	00A1	WH	MB-0012-00
ALULITE 8	EN	00A1	WH	CB-0014-00
BACKFIRE 40	EN	00A1	WH	MB-0013-00
BELUGA SPEED	EN	00A1	WH	RB-0013-00
BIKES CITY	EN	00A1	WH	CB-0013-00
CONCEPTION PALERMO	EN	00A1	WH	CB-0012-00
CRUZE BIKE	EN	00A1	WH	KB-0012-00
DEVIL	EN	00A1	WH	RB-0012-00
DISNEY BIKE	EN	00A1	WH	KB-0011-00
FINISHED BIKE	EN	00A1	WH	FG-0010-00
JAKIMA	EN	00A1	WH	TB-0011-00
KIDS 10	EN	00A1	WH	KB-0010-00
M6 HARDTAIL 18	EN	00A1	WH	MB-0014-00
MEKENA	EN	00A1	WH	KB-0013-00
MONACO MEN RAHMEN	EN	00A1	WH	TB-0013-00
MTB LIGHT V-BRAKE	EN	00A1	WH	MB-0010-00
OCR 1.0	EN	00A1	WH	RB-0014-00
RACE SCANDIUM	EN	00A1	WH	RB-0011-00
SE 9000 DISC	EN	00A1	WH	MB-0011-00
SOLERO MEN	EN	00A1	WH	TB-0012-00
STAR LADY BIKE 28	EN	00A1	WH	TB-0014-00
STREAM N3 28	EN	00A1	WH	CB-0011-00
STREETMAX	EN	00A1	WH	KB-0014-00
VIA NIRONE 7	EN	00A1	WH	RB-0010-00
XT PRO	EN	00A1	WH	TB-0010-00

Double-click on the Mekena bike to select it.

Program Edit Goto System Help

Stock Overview: Company Code/Plant/Storage Location/Batch

Database selections

Material	KB-0013-00		
Plant	00A2	to	00A3
Storage location		to	
Batch		to	

With the material number entered from the search list, enter **##A2** to **##A3** for Plant then click on the execute icon  to look at the stock level.



##A2
##A3

Client/Company Code/Plant/Storage Location/Batch/Special Stock	Unrestricted use
Full	1,000.000
00A1 Bike - America	1,000.000
00A2 Bike DC - San Diego	500.000
30 Finished Goods	500.000
00A3 Bike DC - Miami	500.000
30 Finished Goods	500.000


This report gives stock levels for both the San Diego distribution center (from which Bike Zone's order will be sent) and the second DC for GBI, Miami.


We can get more detail on the stock of Mekena bikes. Select the San Diego DC, then click on the Detailed Display icon. This will give you very specific information about the inventory of Mekena bikes.

Stock Type	Stock
Unrestricted use	500.000
Qual. inspection	0.000
Returns	0.000
On-Order Stock	0.000
Consgt ordered	0.000
Reserved	0.000
Stck trans. (plnt)	0.000
Transfer (SLoc)	0.000
Consgt unrestr.	0.000
Consgt qual insp.	0.000
GR Blocked Stock	0.000
Cust. inquiries	0.000
Cust. quotations	0.000
Sales orders	10.000
Cust.sched.agmts	0.000
Cust. contracts	0.000
Deliv. w/o charge	0.000
Schd.for delivery	0.000
Rcpt reservation	0.000
RetPckgCust.unres	0.000
Empties cust. QI	0.000
ConsgtCust.unrest	0.000
Consgt cust. QI	0.000
Stock in transit	0.000
SC stock unrestr.	0.000
SC stock QI	0.000
Sales order unre.	0.000
Sales order QI	0.000

Note the 10 bikes that are part of the sales order. Click on the enter icon  to close the Detailed Display window, then click on the back icon  to return to the main screen.



Use the search function to enter the material number for the Star Lady Bike 28. Click on the execute icon  and review the stock level for this bike.

Click on the exit icon  to return to the SAP Easy Access screen.



Display Sales Order

Task Display a sales order.

Time 10 min

Short Description Use the SAP Easy Access Menu to display a sales order.

With relatively little user input, the sales order for The Bike Zone has been created. The Display Sales Order transaction provides the opportunity to review the order in detail.


To display a sales order, follow the menu path:

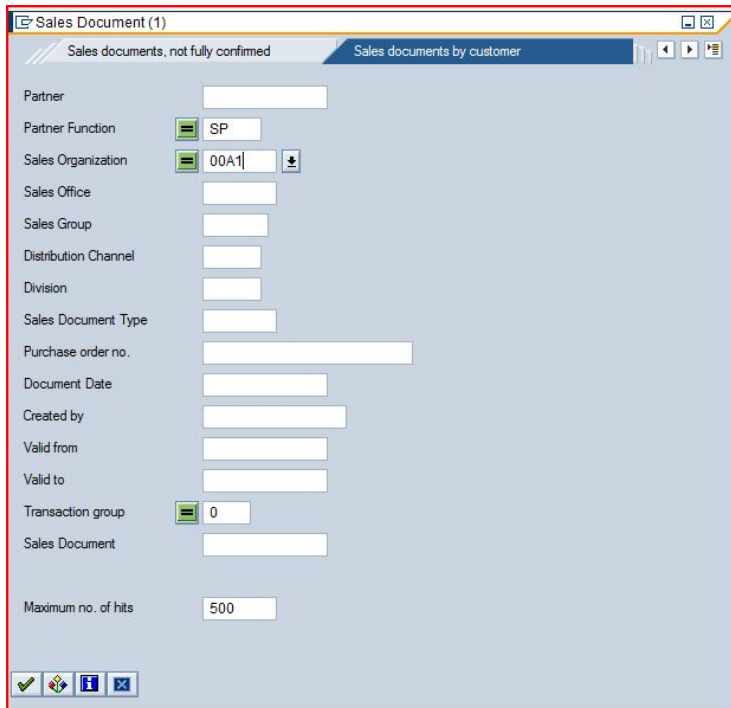
Menu path


Logistics ► Sales and Distribution ► Sales ► Order ► Display

This will produce the following screen.

The screenshot shows the SAP 'Display Sales Order: Initial Screen'. At the top, there is a menu bar with 'Sales document', 'Edit', 'Goto', 'Environment', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main title is 'Display Sales Order: Initial Screen'. Underneath the title, there are several tabs: 'Sales', 'Item overview', 'Ordering party', and 'Orders'. The 'Sales' tab is active. Below the tabs, there is a search field labeled 'Order' with a search icon. Below the search field, there is a 'Search Criteria' section with several input fields: 'Purchase Order No.', 'Sold-to party', 'Delivery', 'Billing Document', and 'WBS Element'. At the bottom of the search criteria section, there is a 'Search' button.

To make sure we have the correct sales order number, we will use the search function to find it. Click on the order field, then click on the search icon . This will bring up the search pop-up window.




After entering your sales organization (##A1), click on the enter icon  to get a list of sales orders.


##A1

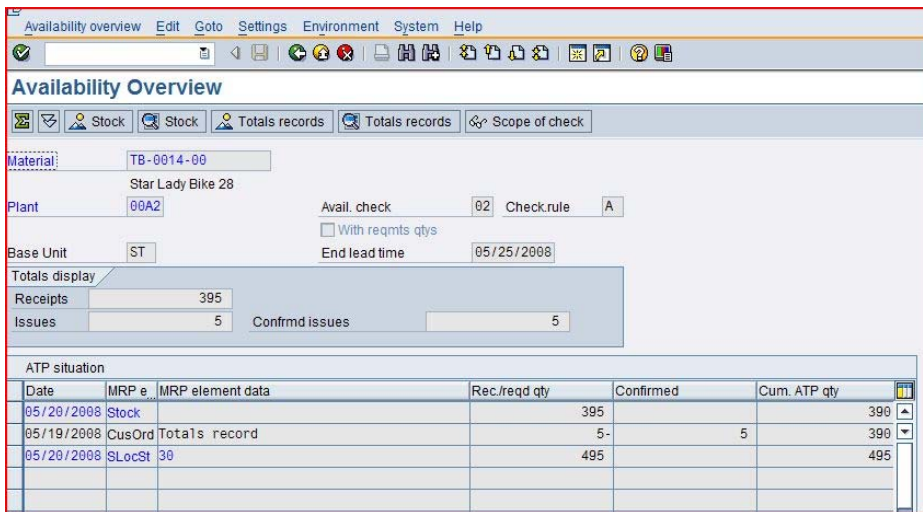
Partn	Funct	SOrg	SO	SGrp	DChl	Dv	SaTy	Purchase order	Doc. Date	Created by	Valid from	Valid to	TrG	Document
101	SP	00A1			WH	01	OR	1234	05/15/2008	BWAGNER	00/00/0000	12/31/9999	0	13
101	SP	00A1			WH	01	OR	1234	05/15/2008	BWAGNER	00/00/0000	12/31/9999	0	14
101	SP	00A1			WH	01	OR	A23211	05/16/2008	BWAGNER	00/00/0000	12/31/9999	0	15
306	SP	00A1			WH	01	OR	Z4513B	05/19/2008	BWAGNER	00/00/0000	12/31/9999	0	17

You can sort the search results list by any of the columns merely by clicking on the column heading. As sales order numbers are assigned sequentially, the most recent sales order can be easily found by sorting by document number and selecting the last one on the list.

After sorting the list (**Document** heading) and double-clicking on the most recent sales order number, click on  to display the sales order. This will produce the following sales order items.

Item	Material	Order Quantity	SU	S	Description
10	KB-0013-00		10	ST	Mekena
20	TB-0014-00		5	ST	Star Lady Bik

Select the Star Lady Bike 28, then click on the display availability icon  to explore the stock for this item in detail.

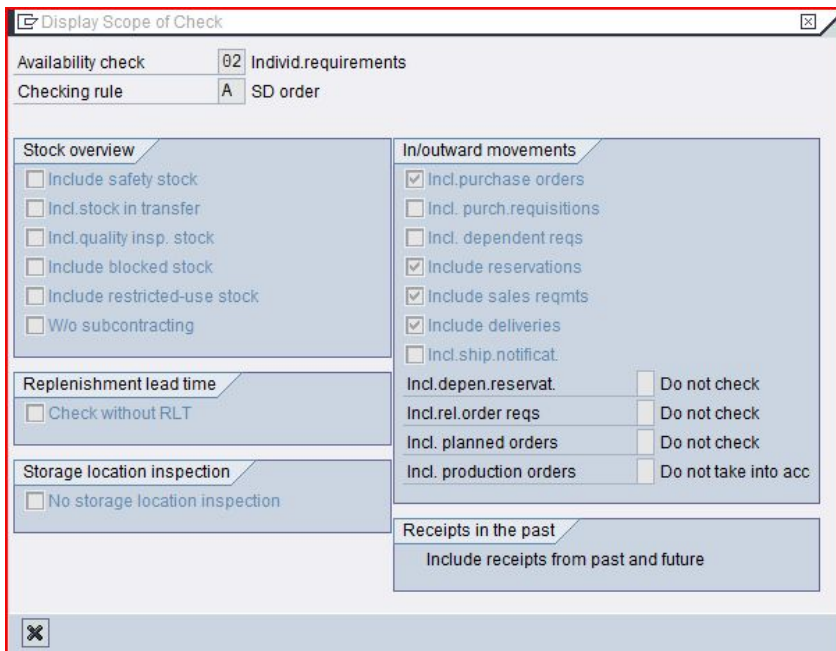


Date	MRP e	MRP element data	Rec./reqd qty	Confirmed	Cum. ATP qty
05/20/2008	Stock		395		390
05/19/2008	CusOrd	Totals record	-5	5	390
05/20/2008	SLocSt	30	495		495

This screen shows that, in this case, there are actually 495 bikes in stock, but because a safety stock of 100 is desired, we ideally have 395 available to sell, and the order we are displaying will use 5 of these.

Note: your numbers may be different.

Clicking on the **Display Scope of check** icon will produce the following pop-up window.



Availability check: 02 Individ.requirements
Checking rule: A SD order

Stock overview

- Include safety stock
- Incl.stock in transfer
- Incl.quality insp. stock
- Include blocked stock
- Include restricted-use stock
- W/o subcontracting

Replenishment lead time

- Check without RLT

Storage location inspection

- No storage location inspection

In/outward movements



- Incl.purchase orders
- Incl. purch.requisitions
- Incl. dependent reqs
- Include reservations
- Include sales reqmts
- Include deliveries
- Incl.ship.notificat.

Incl.depen.reservat. Do not check
Incl.rel.order reqs Do not check
Incl. planned orders Do not check
Incl. production orders Do not take into acc


Receipts in the past

- Include receipts from past and future

This screen displays the elements considered when performing the availability check. For example, **Incl. purchase orders** is selected, which means that a purchase order will be considered as available stock from its receipt date onward.

Click on the cancel icon  to close the pop-up window, then click on the back icon  to return to the overview screen.

All items						
Item	Material	Order Quantity	SU	S	Description	Customer Mate
10	KB-0013-00	10	ST	<input checked="" type="checkbox"/>	Mekena	
20	TB-0014-00	5	ST	<input checked="" type="checkbox"/>	Star Lady Bike 28	

After selecting the Mekena bike and clicking on the item conditions icon , the following screen will be displayed.

Sales document Edit Goto Extras Environment System Help

Display Standard Order 17: Item Data


Sales Document Item: 10 Item category: TAN Standard Item
 Material: KB-0013-00 Mekena

Sales A Sales B Shipping Billing Document **Conditions** Account assignment Schedule lines Partners Tex

Qty: 10 ST Net: 1,710.00 USD Tax: 0.00

N	CnTy	Name	Amount	Crcy	per	U	Condition value	Curr.	NumC	OUn	CCon	Un	Con
	PR00	Price	185.00	USD		1ST	1,850.00	USD	1	ST	1	ST	
		Gross Value	185.00	USD		1ST	1,850.00	USD	1	ST	1	ST	
	K004	Material	5.00	USD		1ST	50.00	USD	1	ST	1	ST	
	RA00	% Discount from Net	5.000	%			90.00	USD	0		0		
		Discount Amount	14.00	USD		1ST	140.00	USD	1	ST	1	ST	
		Rebate Basis	171.00	USD		1ST	1,710.00	USD	1	ST	1	ST	
		Net Value for Item	171.00	USD		1ST	1,710.00	USD	1	ST	1	ST	
		Net Value 2	171.00	USD		1ST	1,710.00	USD	1	ST	1	ST	
		Net Value 3	171.00	USD		1ST	1,710.00	USD	1	ST	1	ST	
		Total	171.00	USD		1ST	1,710.00	USD	1	ST	1	ST	
	SKT0	Cash Discount	0.000	%			0.00	USD	0		0		
	VPRS	Internal price	155.00	USD		1ST	1,550.00	USD	1	ST	1	ST	
		Condit Margin	16.00	USD		1ST	160.00	USD	1	ST	1	ST	

Condition rec. Analysis Update

The details of the price calculation for the Mekena bike are displayed. Clicking on the  Analysis icon produces the following screen.

Condition type	Message	Description
EK01	001	Manual condition
PR00	208	Condition record has been found
PB00	001	Manual condition
VA00	102	Access not made (initialized field)
Gross Value	200	Subtotal
KA00	009	Condition record is missing
K032	102	Access not made (initialized field)
K005	009	Condition record is missing
K007	009	Condition record is missing
K004	201	Condition entered manually
K020	002	Access not made (initialized field)
K029	102	Access not made (initialized field)
K030	102	Access not made (initialized field)
K031	102	Access not made (initialized field)
RA01	001	Manual condition
RA00	207	Condition has been found (without condition record)


This screen shows the pricing procedure, which is the sequence of steps used to calculate the price. The procedure looks for a number of **conditions** that may apply to this item purchased by this customer. Conditions are prices, discounts, surcharges, etc.

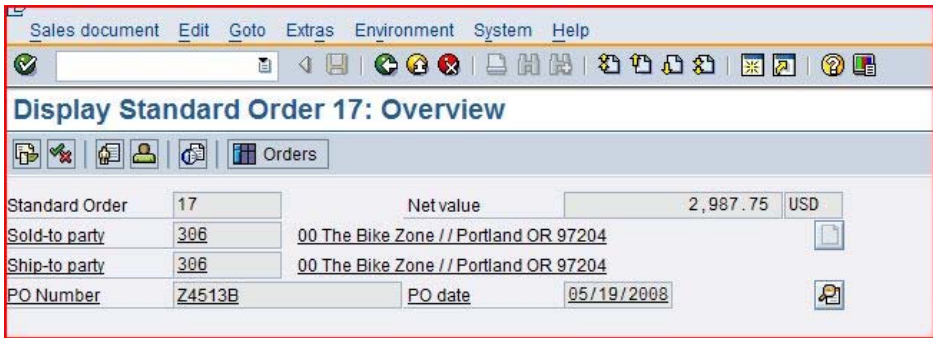
Condition **PR00** is a price condition, and establishes the base price for the bike. Expand on this condition to see the details of the pricing procedure's search for a price.


Procedure	Description
STBIKE	Standard - Bike Company
EK01	Actual Costs
PR00	Price
10(PR02)	Customer/material with release status
20(PR02)	Price list category/currency/material with release status
30(PR02)	Price list category/currency/material with release status
40(PR02)	Material with release status
	185.00 US KB-0013-00

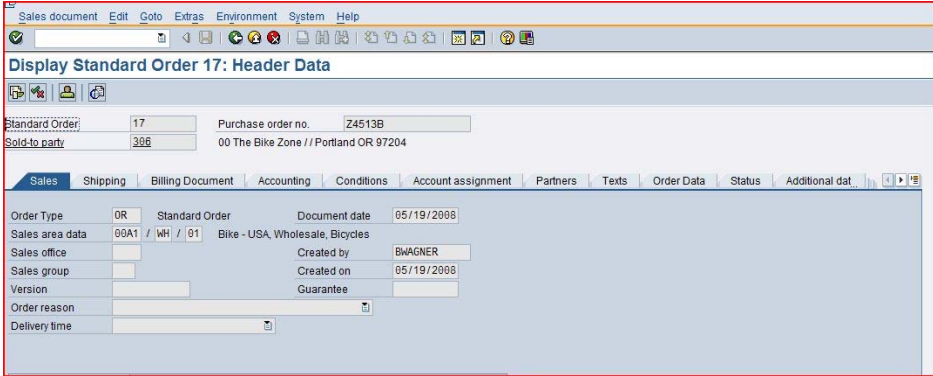
The pricing procedure specifies a search for the price starting with the most specific pricing to the most generic. It looks first for a Customer/material price, which is a price for a particular customer for a particular material. It then looks for a price list, which might have a price for the material for a customer group (wholesale, retail, etc.) or currency. Finally, it looks for a price for the material itself.

In our case, there is no special pricing for this bike with this customer, so the material price of 185.00 is used.

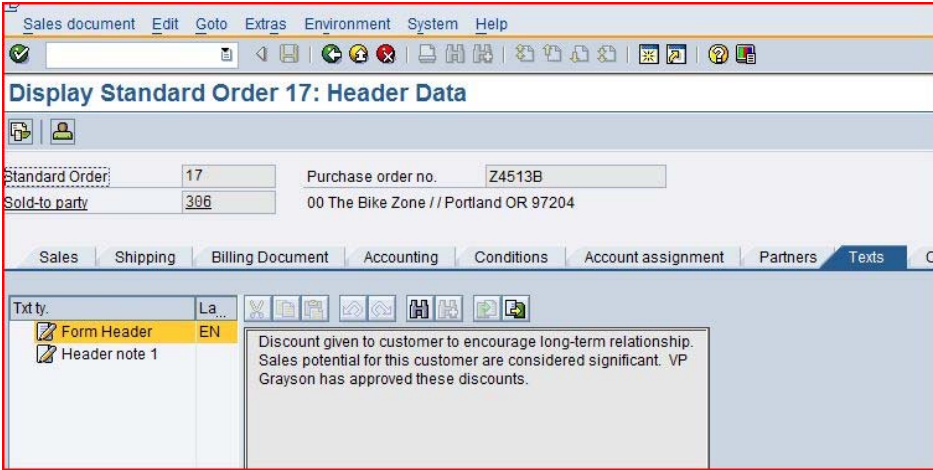
Click on the back icon  twice to return to the overview screen.




Two discounts were manually applied to The Bike Zone’s order. We justified these discounts with a note in the quotation. This note was copied from the quotation into the sales order, which we can confirm by clicking on the header details icon 



Click on the **Texts** tab to view the note.



Note that the note has been copied.

Click on the exit icon  to return to the SAP Easy Access screen.



Start Delivery Process

Task Start the delivery process.

Time 5 min

Short Description Use the SAP Easy Access Menu to start the delivery process.

To start the process that will fulfill The Bike Zone's order, we need to create a deliver document. To do this, follow the menu path:

Menu path

**Logistics ► Sales and Distribution ► Shipping and Transportation
► Outbound Delivery ► Create ► Single Document ► With
Reference to Sales Order**


This will produce the following screen.

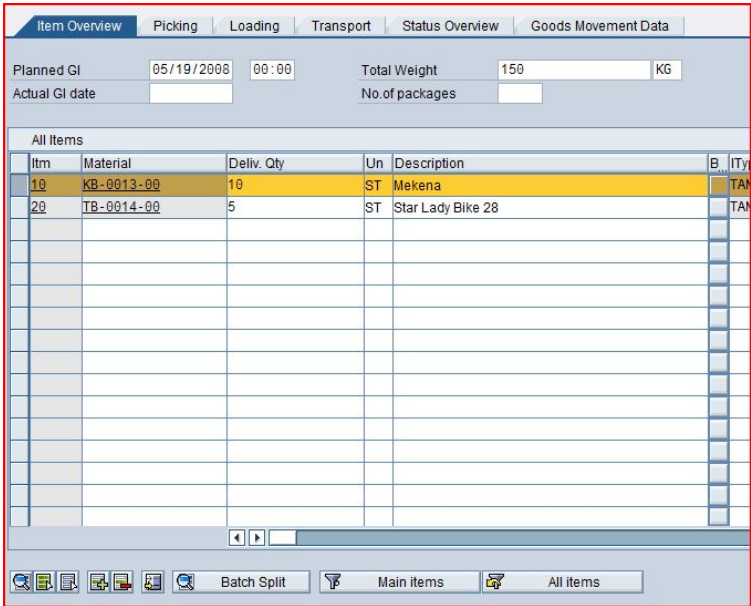
Enter **##A2** for Shipping Point. Enter a selection date one week from today (you can use **F4** to call up the calendar window).


##A2

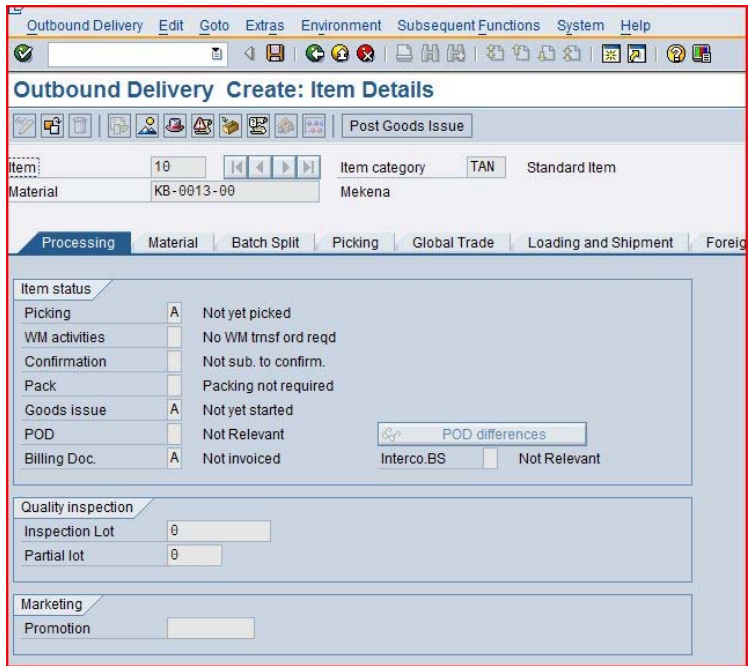
If the sales order number is not entered automatically, you can search for you sales order number using the **Sales documents by customer** tab. Enter your sales organization (**##A1**) and transaction group **0** (sales order).


##A1
0

Then click on the enter icon .




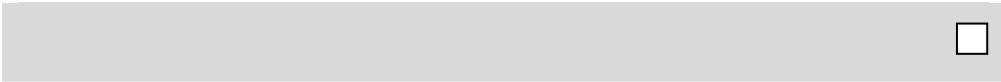
Select the Mekena bike, then click on the details icon , which will produce the following screen.



This screen shows that the order has not yet been picked. After clicking on , a delivery document will be created with a unique document number



Click on the exit icon  to return to the SAP Easy Access screen.



Check Stock Status

Task Check the inventory.

Time 5 min

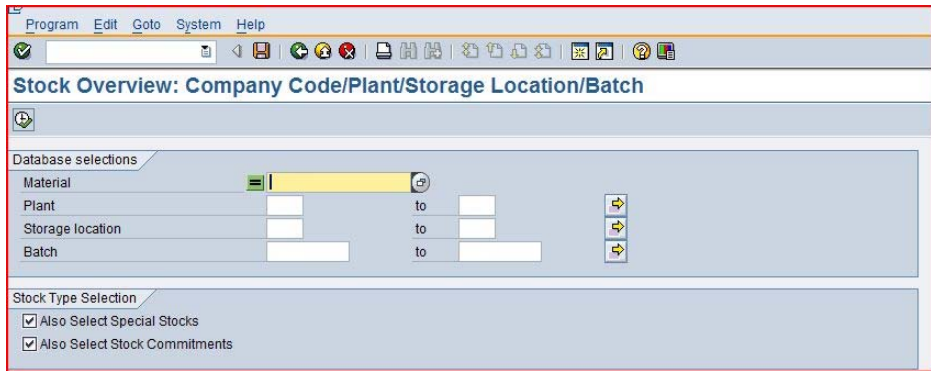
Short Description Use the SAP Easy Access Menu to check the stock status.


To check on the inventory for the bikes in the sales order for The Bike Zone, follow the menu path:

Menu path

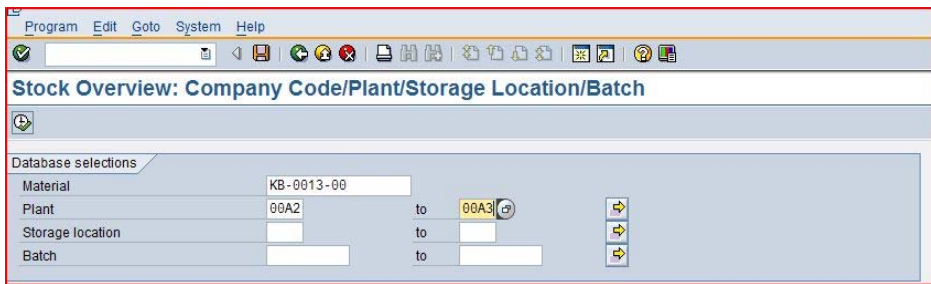
Logistics ► Materials Management ► Inventory Management ► Environment ► Stock ► Stock Overview


This will produce the following screen.



Click on the **Material** field, then click on the search icon . Use the **Sales material by description tab** with **###A1** for Sales Organization and **WH** for Distribution Channel. Pick the Mekena bike.

###A1
WH



After using the search function to find the material number for the Mekena, enter **###A2** to **###A3** for plant, then click on the execute icon . This will produce the following screen.

###A2
###A3

Stock Overview: Basic List

Selection
 Material: KB-0013-00 (Bike) | Material Type: HAWA | Trading Goods
 Unit of Measure: ST | Base Unit of Measure: ST

Stock Overview

Client/Company Code/Plant/Storage Location/Batch/Special Stock	Unrestricted use
Full	1,000,000
00A1 Bike - America	1,000,000
00A2 Bike DC - San Diego	500,000
30 Finished Goods	500,000
00A3 Bike DC - Miami	500,000
30 Finished Goods	500,000

Select the San Diego DC, then click on the Detailed Display icon.

Stock: Plnt
Plnt: 00A2

Plnt

Stock Type	Stock
Unrestricted use	500,000
Qual. inspection	0,000
Returns	0,000
On-Order Stock	0,000
Consgt ordered	0,000
Reserved	0,000
Stck trans. (plnt)	0,000
Transfer (SLoc)	0,000
Consgt unrestr.	0,000
Consgt qual.insp.	0,000
GR Blocked Stock	0,000
Cust. inquiries	0,000
Cust. quotations	0,000
Sales orders	0,000
Cust.sched.agmts	0,000
Cust. contracts	0,000
Deliv. w/o charge	0,000
Schd.for delivery	10,000
Rcpt reservation	0,000
RetPckgCust.unres	0,000
Empties cust. QI	0,000
ConsgtCust.unrest	0,000
Consgt cust. QI	0,000
Stock in transit	0,000
SC stock unrestr.	0,000
SC stock QI	0,000
Sales order unre.	0,000
Sales order QI	0,000

Note that the 10 bikes for The Bike Zone order are now showed as **Schd. for delivery**.

Click on the exit icon to return to the SAP Easy Access screen.



Pick Materials on Delivery Note

Task Pick materials on delivery note.

Time 5 min

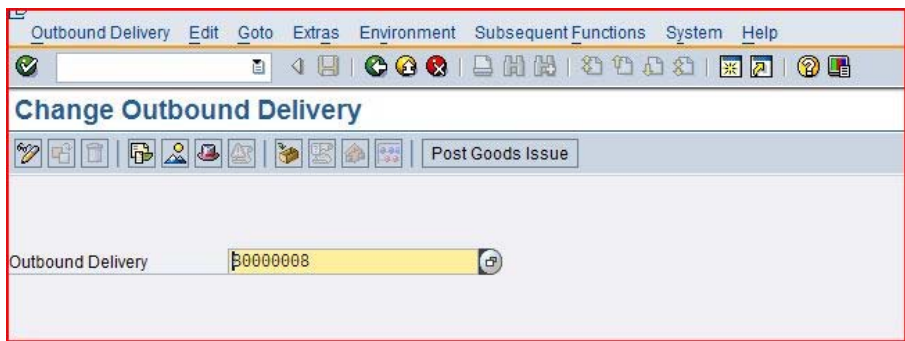
Short Description Use the SAP Easy Access Menu to pick materials.

To record the picking of the material, we change the delivery document. To change the delivery document, follow the menu path:

Menu path

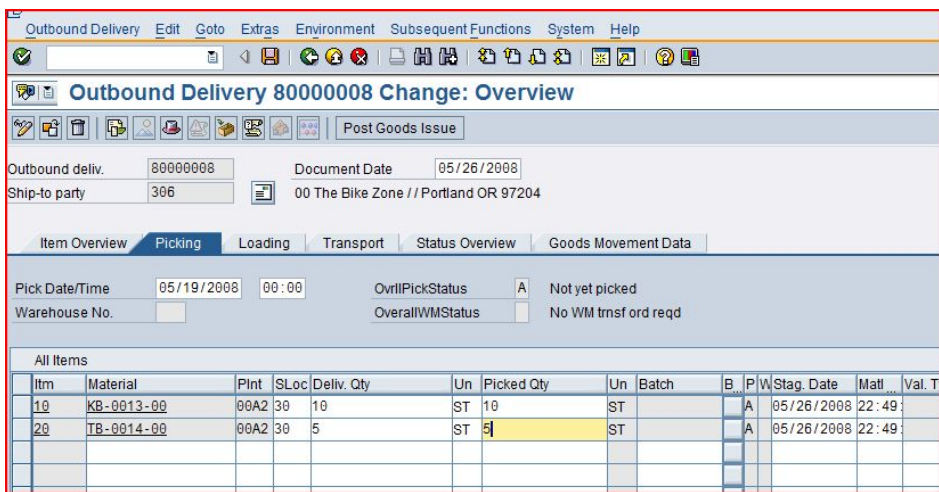
Logistics ► Sales and Distribution ► Shipping and Transportation ► Outbound Delivery ► Change ► Single Document

This will produce the following screen.




If the Outbound Delivery document number is not entered automatically, you can search for your delivery document using the tab **Outbound Delivery: Not Posted for Goods Issue**.

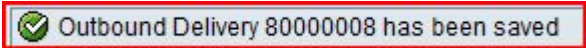
After clicking on the enter icon , you will get the following screen.




Click on the picking tab, then enter **30** for SLoc (storage location) and the appropriate quantity for the picked quantity.

30

Click on  to save the picking information. You should get the following message at the bottom-left corner of the screen.

 Outbound Delivery 80000008 has been saved

Click on the exit icon  to return to the SAP Easy Access screen.



Post Goods Issue

Task Post a goods issue.

Time 5 min

Short Description Use the SAP Easy Access Menu to post a goods issue.

To post the goods issue (change the possession of the material from GBI to The Bike Zone), follow the menu path:

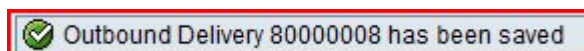
Menu path


**Logistics ▶ Sales and Distribution ▶ Shipping and Transportation
▶ Outbound Delivery ▶ Change ▶ Single Document**

This will produce the following screen.



After confirming that you have the delivery document number (you can search for your delivery document using the tab **Outbound Delivery: Not Posted for Goods Issue**), click on the **Post Goods Issue** icon. You should get the following message at the bottom-left corner of the screen.



Click on the exit icon  to return to the SAP Easy Access screen.



Check Stock Status

Task Check the inventory.

Time 5 min

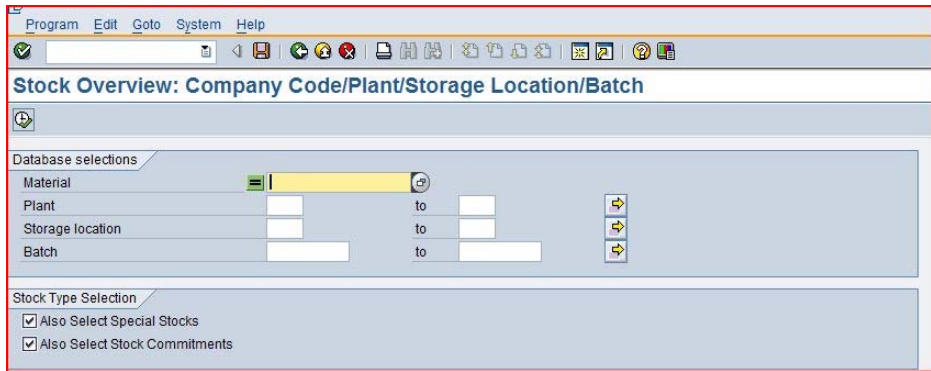
Short Description Use the SAP Easy Access Menu to check the stock status.


To see the impact that the goods issue for the bikes in the sales order for The Bike Zone has had on the inventory position of GBI, follow the menu path:

Menu path

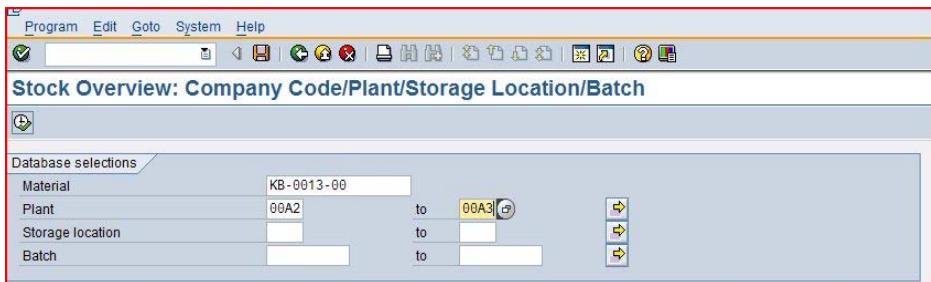
Logistics ► Materials Management ► Inventory Management ► Environment ► Stock ► Stock Overview


This will produce the following screen.



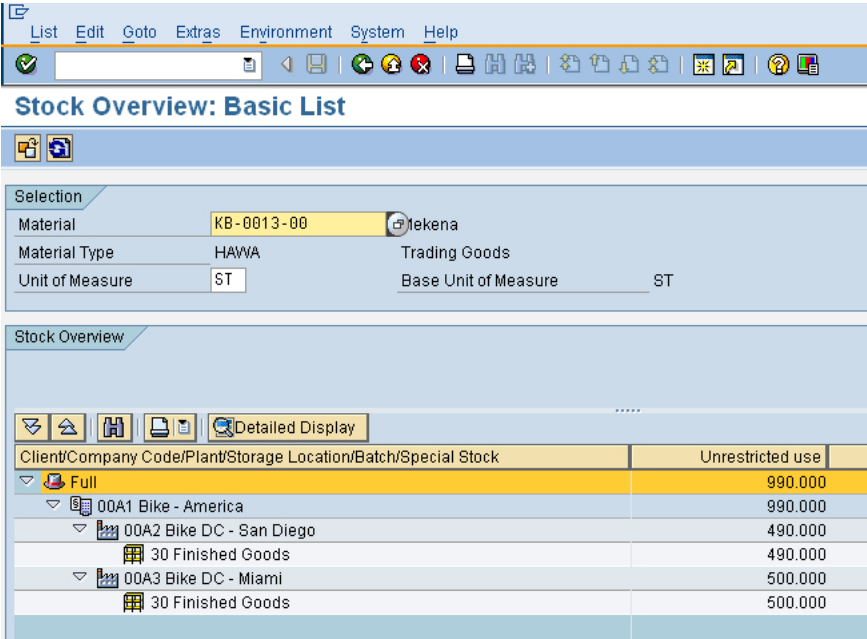
Click on the **Material** field, then click on the search icon . Use the **Sales material by description tab** with **###A1** for Sales Organization and **WH** for Distribution Channel. Pick the Mekena bike.

###A1
WH

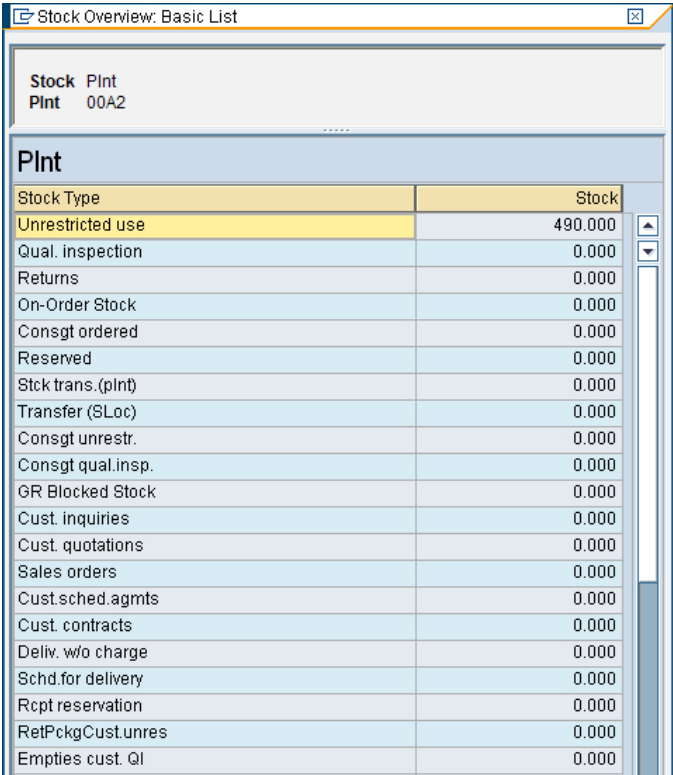


After using the search function to find the material number for the Mekena, enter **###A2** to **###A3** for plant, then click on the execute icon . This will produce the following screen.

###A2
###A3



Note that the available inventory has changed. Select the San Diego DC, then click on the Detailed Display icon.



The inventory is reduced from before by the amount that used to appear as **Schd. for delivery**.

Click on the exit icon to return to the SAP Easy Access screen.



Create Billing for Customer

Task Create a billing document for a customer.

Time 10 min

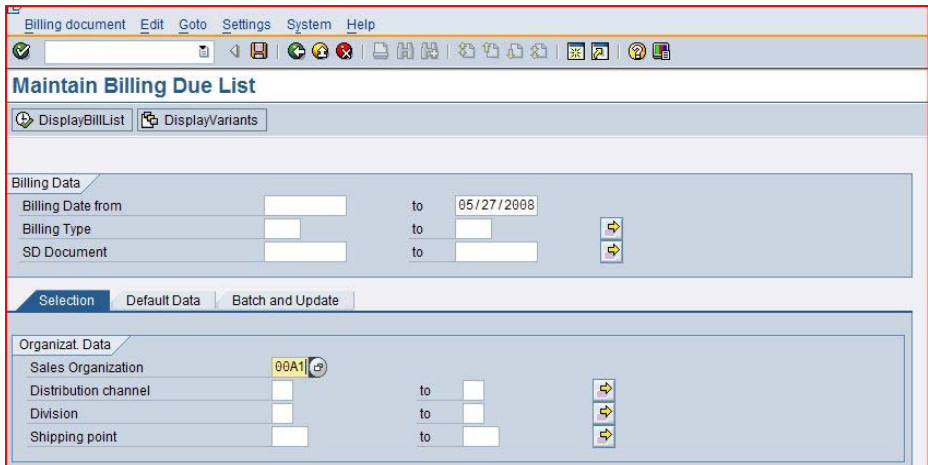
Short Description Use the SAP Easy Access Menu to create a customer billing document.


With the delivery complete, the customer can be invoiced. To do this, follow the menu path:

Menu path

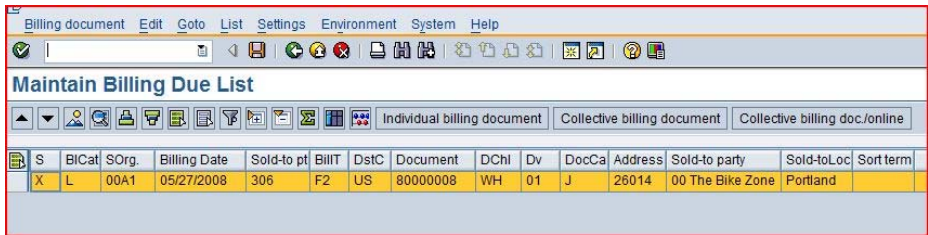
Logistics ► Sales and Distribution ► Billing ► Billing Document ► Process Billing Due List

This will produce the following screen.

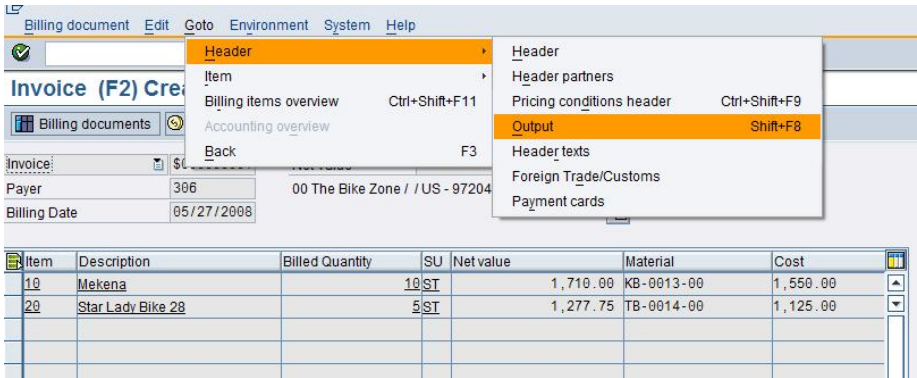


Enter **##A1** for Sales Organization, then click on the  Display Bill List icon. This will produce the following screen.

##A1



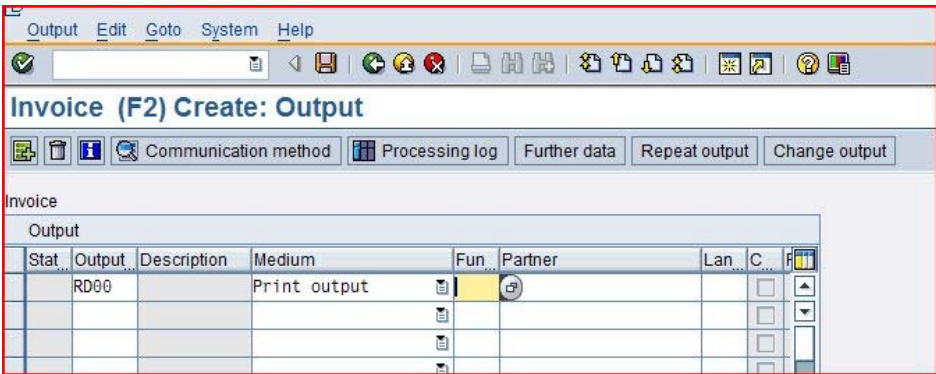
Click on **Individual billing document**, which will produce the following screen.




To setup printing of the invoice, follow the pull-down menu path:

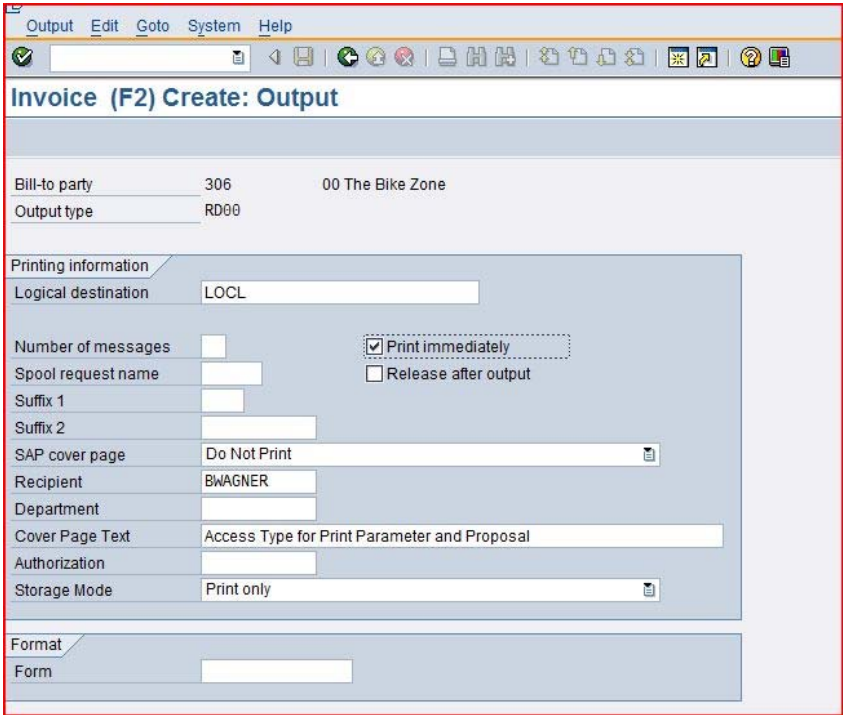
Goto ► Header ► Output


which will call up the following screen.



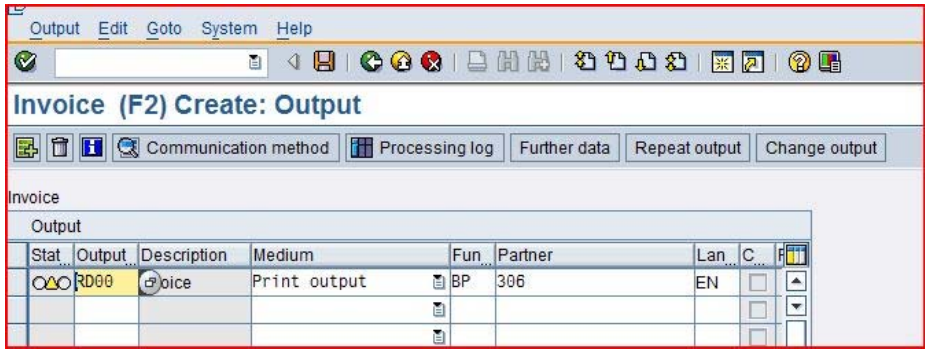
Enter **RD00** (Invoice) for Output and select **Print output** for Medium, then click on the  Display Communication method icon. This will produce the following screen.

RD00
Print output

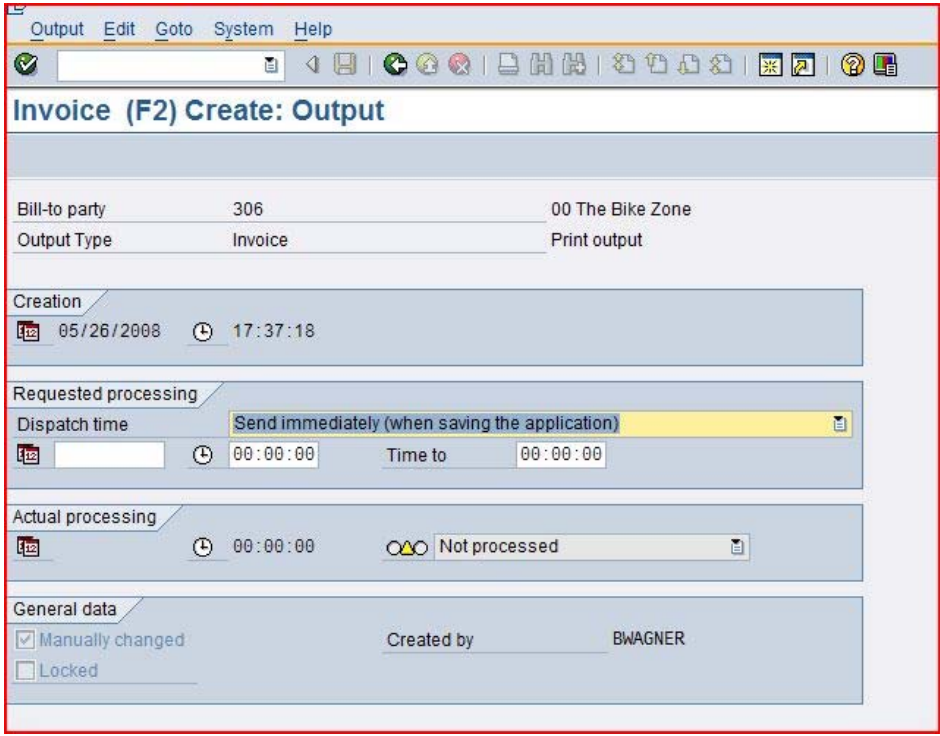



Enter **LOCL** for Logical destination and select **Print immediately**, then click on the back icon .

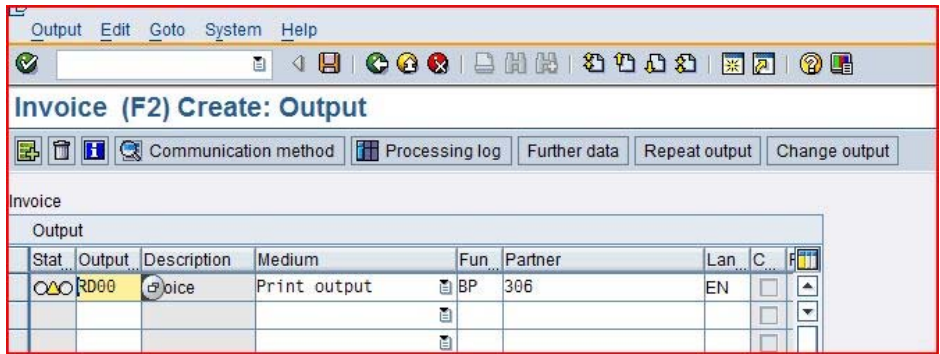
LOCL
Print immediately



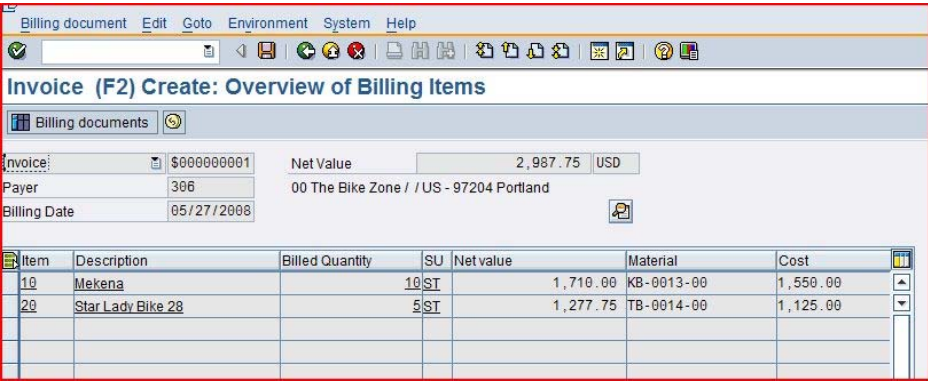
Click on the **Further data** icon, which will produce the following screen.




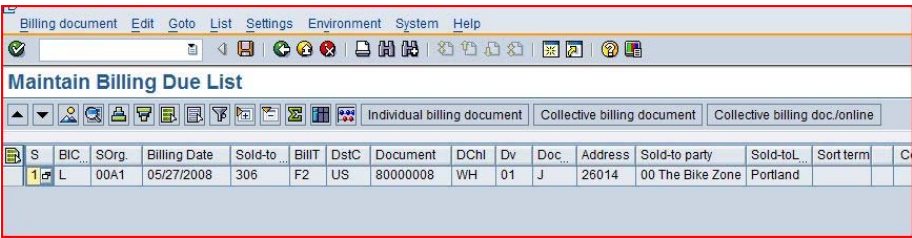
Select **Send immediately (when saving the application)** for Dispatch time so that the invoice will print immediately, then click on the back icon .



Click on the back icon  again.




Click on the save icon  to return to the Maintain Billing Due List screen.



Note that the highlight is turned off on the line, and there is a message at the bottom of the screen.



Click on the exit icon  to return to the SAP Easy Access screen.



Display Billing Document and Customer Invoice

Task Display a billing document and a customer invoice.

Time 5 min

Short Description Use the SAP Easy Access Menu to display a billing document/customer invoice.

The invoice that will be sent to The Bike Zone can be viewed by following the menu path:

Menu path

Logistics ► Sales and Distribution ► Billing ► Billing Document ► Display


This will produce the following screen.

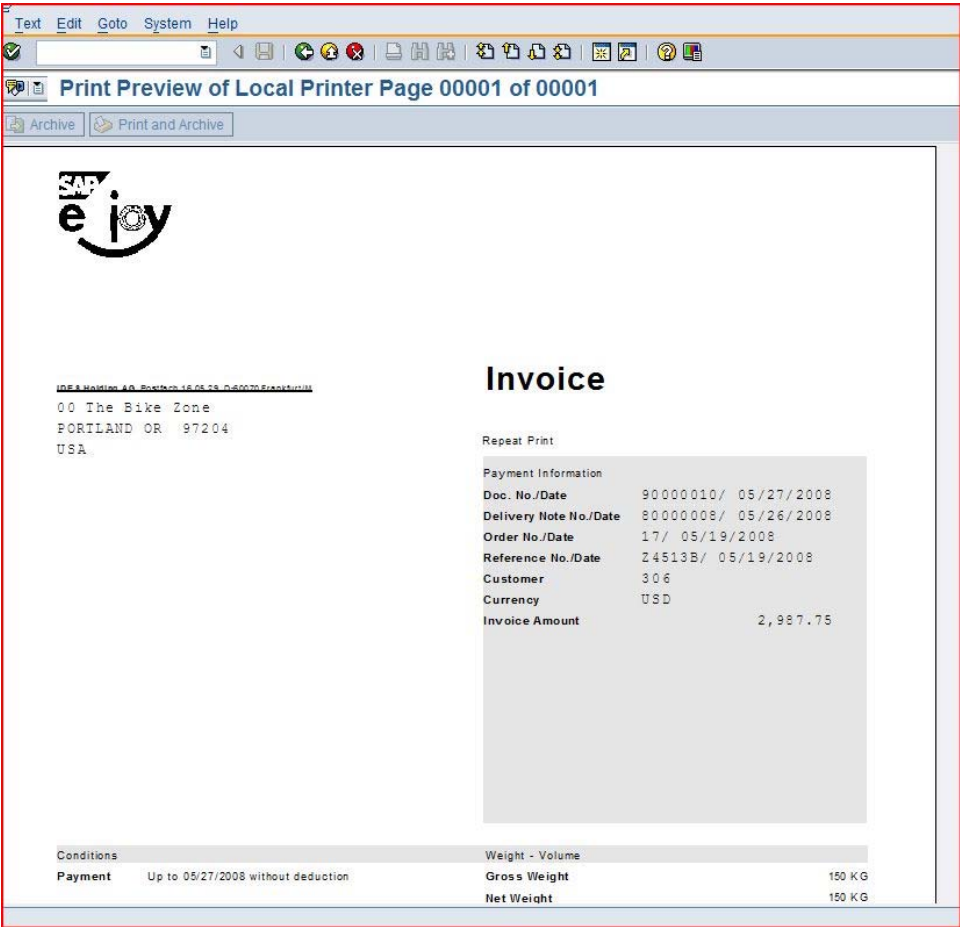
If the billing document number is not entered automatically, you can find it from the document flow in your sales order. Follow the pull-down menu path:



Billing document ► Issue Output To

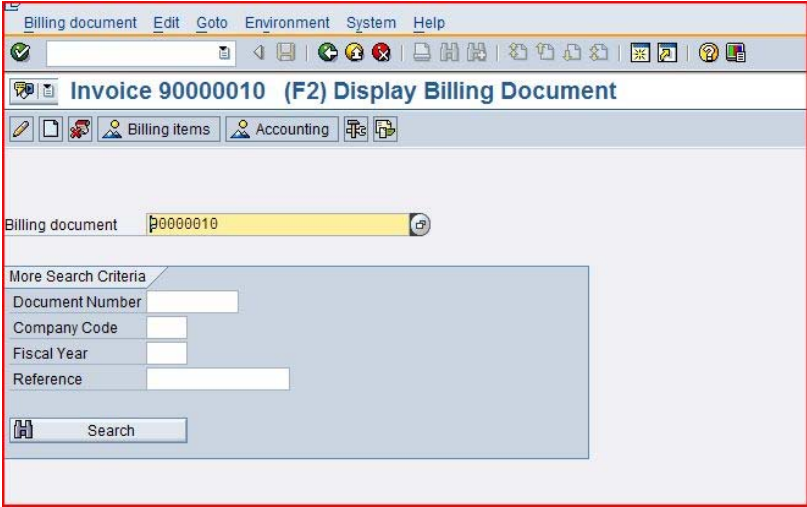
This will produce the following pop-up window.


Message type	Name	Created on	Created at	Process status	Transm. Medl.
RD00	Invoice	05/26/2008	17:37:18	1	1

Make sure the invoice line is selected, then click on the **Print preview** icon . This will produce the following screen.



After reviewing the invoice that will be printed and sent to The Bike Zone, click on the back icon , then close the pop-up window by clicking on the cancel icon .



To review the accounting implications of this sale, click on the  Accounting icon. This will produce the following screen.


The screenshot shows the SAP 'Display Document: Data Entry View' window. At the top, there is a menu bar with 'Document', 'Edit', 'Goto', 'Extras', 'Settings', 'Environment', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main area is titled 'Data Entry View' and contains a form with the following fields:

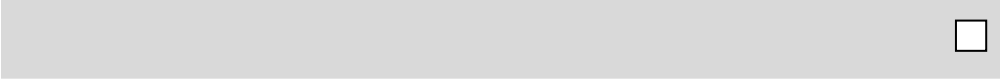
- Document Number: 90000004
- Company Code: 00A1
- Fiscal Year: 2008
- Document Date: 05/27/2008
- Posting Date: 05/27/2008
- Period: 5
- Reference: Z4513B
- Cross-CC no.:
- Currency: USD
- Texts exist:
- Ledger Group:

Below the form is another toolbar with icons for printing, zooming, and other functions. At the bottom, there is a table of accounting postings:

C...	Itm	P	S	Account	Description	Amount	Curr.	Tx
00A1	1	01		306	00 The Bike Zone	2,987.75	USD	
	2	50		600100	Sales Revenue	1,850.00-	USD	
	3	40		610100	Revenue Deductions	50.00	USD	
	4	40		610100	Revenue Deductions	90.00	USD	
	5	50		600100	Sales Revenue	1,345.00-	USD	
	6	40		610100	Revenue Deductions	67.25	USD	

Review the accounting postings due to this sales order.

Click on the exit icon  to return to the SAP Easy Access screen.



Post Receipt of Customer Payment

Task Post a customer payment receipt.

Time 10 min

Short Description Use the SAP Easy Access Menu to post a customer payment receipt.

After The Bike Zone mails its payment, it needs to be recorded. To do this, follow the menu path:

Menu path

Accounting ► **Financial Accounting** ► **Accounts Receivable** ► **Document Entry** ► **Incoming Payment**


This will produce the following screen.

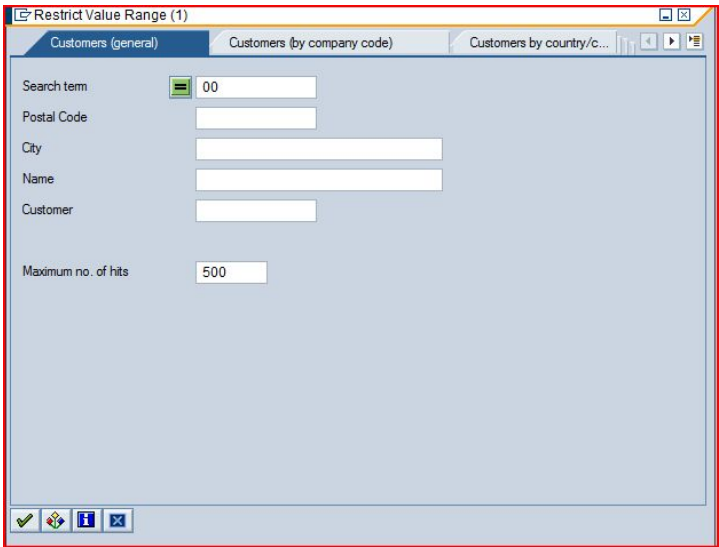
The screenshot displays the 'Post Incoming Payments: Header Data' screen in SAP. The interface includes a menu bar (Document, Edit, Goto, Settings, System, Help) and a toolbar. The main area is divided into several sections:

- Process open items:** Contains fields for Document Date (05/27/2008), Type (DZ), Company Code (00A1), Posting Date (05/27/2008), Period (5), Currency/Rate (USD), Document Number, Translatn Date, Reference, Cross-CC no., Doc.Header Text, Trading part.BA, and Clearing text.
- Bank data:** Contains fields for Account (100100), Business Area, Amount (2987.75), Amount in LC, Bank charges, LC bank charges, Value date, Profit Center, Text, and Assignment.
- Open item selection:** Contains fields for Account (highlighted), Account Type (D), Special G/L ind, Pmnt advice no., and checkboxes for 'Distribute by age' and 'Automatic search'. There is also a search icon (magnifying glass) next to the account field.
- Additional selections:** Contains radio buttons for 'None', 'Amount', 'Document Number', 'Posting Date', 'Dunning Area', and 'Others'.

Use the **F4/F2** function keys to enter the current date for the document date. Enter **##A1** for Company Code, **USD** for Currency/Rate, **1001##** for Account, and **2987.75** for amount.

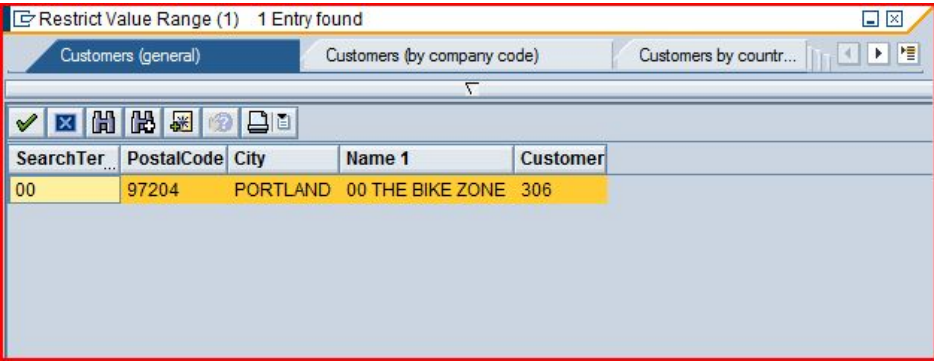
##A1
USD
1001##
2987.75

Then click on the account field, then the search icon , to get the following search pop-up window.

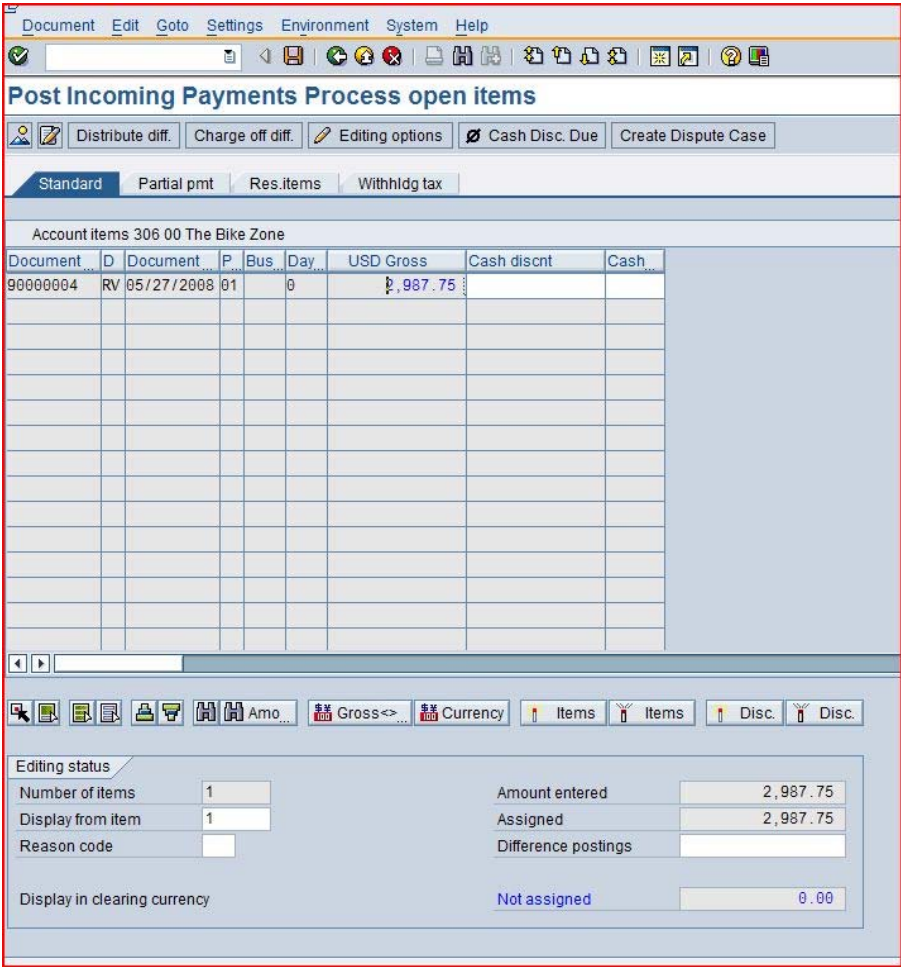



As The Bike Zone was created with the data set number (##) as a search term, you can use this to find The Bike Zone. After entering ## on the **Customers (general)** tab, click on the enter icon ✓ and you will get the following results.


##

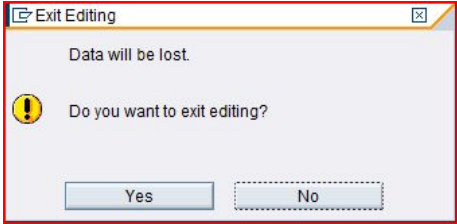


After double-clicking on Bike Zone to select it, click on the Process open items icon. You will get the following screen.



Double-click on the **2,987.75** amount to assign the payment to the accounts receivable. After assigning the payment to the invoice, click on the save icon  to post the payment.

Click on the exit icon , which will produce the following pop-up window.



There is no data to be lost, so click on the **Yes** icon to return to the SAP Easy Access menu.



Review Document Flow

Task Review the document flow.

Time 5 min

Short Description Use the SAP Easy Access Menu to review the document flow.

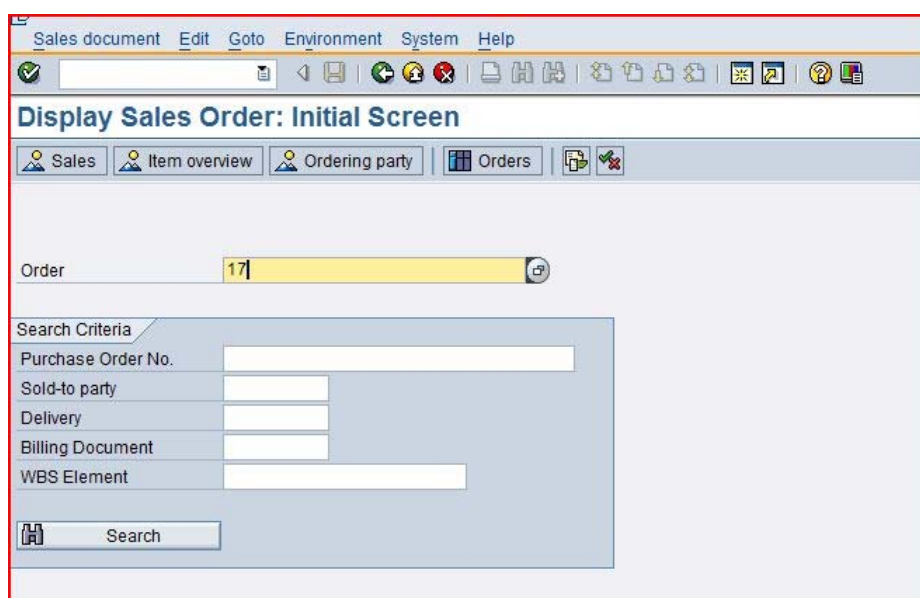
The document flow tool links all documents that were used in The Bike Zone's sales order. Again, there are many ways to access the document flow tool. One way is to start by displaying the sales order document.

To display the document flow, follow the menu path:

Menu path

Logistics ► Sales and Distribution ► Sales ► Order ► Display

This will produce the following screen.



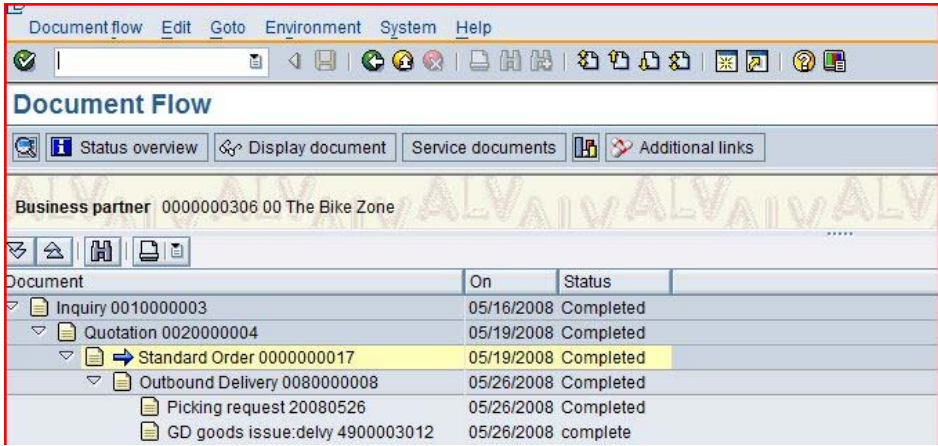
If your sales order is not displayed, you can search for your sales order number using the **Sales documents by customer** tab. Enter your sales organization (**##A1**) and transaction group **0** (sales order).

##A1
0


To access the document flow tool, follow the pull-down menu path:

Environment ► Display document flow

The document flow for The Bike Zone will look like the following.



Review the documents for 'The Bike Zone's order.

Click on the exit icon  to return to the SAP Easy Access screen.

