

# SAP S/4HANA SD Task Report – Global Bike End-to-End Sales Process

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## 1. Introduction

This report documents the execution of a complete sales process in the SAP S/4HANA SD (Sales and Distribution) module for the Global Bike training company. The task was performed based on a 24-step structured case study covering sales area setup, master data preparation, sales transactions, and financial closure. The goal was to simulate a real-world sales workflow in a fully integrated ERP environment.

## 2. Objectives

- To execute a structured and complete SAP SD process for Global Bike.
- To understand the linkage between master data and sales transactions.
- To gain practical skills using SAP Fiori apps in sales and distribution tasks.
- To learn the impact of sales documents on logistics and finance.

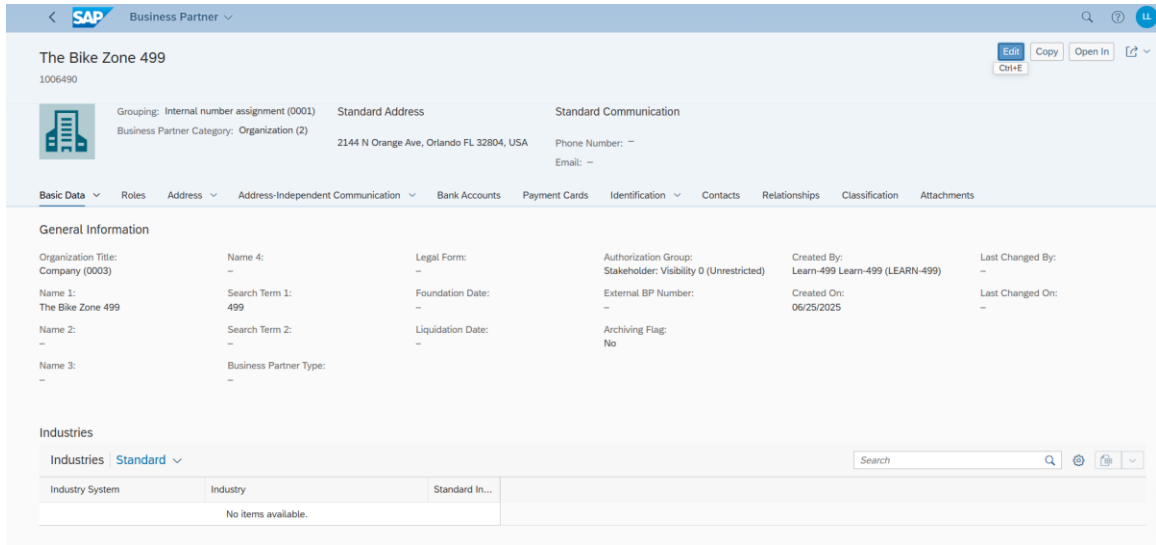
## 3. Methodology

Each step in the 24-step case study was carried out sequentially using the SAP S/4HANA Fiori environment. The task was performed manually without automation, simulating how SAP SD consultants handle client-side configuration and transactional tasks. Screenshots were captured and labeled under each execution section.

## 4. End-to-End SD Execution

### Step 1: Create New Customer

Created "The Bike Zone 499" with FI and SD roles, complete address, payment terms, shipping, billing, pricing, and tax data.

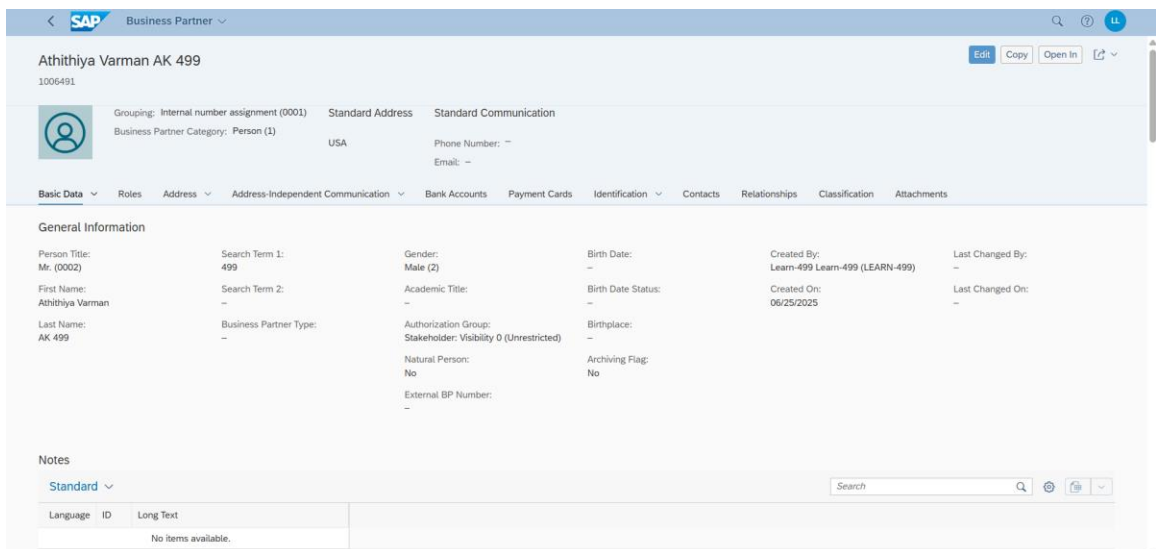


The screenshot shows the SAP Business Partner creation interface for 'The Bike Zone 499' (ID 1006490). The header includes the SAP logo, a back arrow, and the text 'Business Partner'. On the right, there are buttons for 'Edit', 'Copy', 'Open In', and a dropdown menu. Below the header, the business partner's name 'The Bike Zone 499' and ID '1006490' are displayed. The main content area is divided into three tabs: 'Grouping: Internal number assignment (0001)', 'Standard Address', and 'Standard Communication'. The 'Standard Address' tab is active, showing the address '2144 N Orange Ave, Orlando FL 32804, USA' and contact information (Phone Number: --, Email: --). Below the tabs, there is a navigation bar with various categories: Basic Data, Roles, Address, Address-Independent Communication, Bank Accounts, Payment Cards, Identification, Contacts, Relationships, Classification, and Attachments. The 'General Information' section displays a grid of fields: Organization Title (Company (0003)), Name 1 (The Bike Zone 499), Name 2 (--), Name 3 (--), Name 4 (--), Search Term 1 (499), Search Term 2 (--), Business Partner Type (--), Legal Form (--), Foundation Date (--), Liquidation Date (--), Authorization Group (Stakeholder: Visibility 0 (Unrestricted)), External BP Number (--), Archiving Flag (No), Created By (Learn-499 Learn-499 (LEARN-499)), Created On (06/25/2025), Last Changed By (--), and Last Changed On (--). The 'Industries' section shows a table with columns 'Industry System', 'Industry', and 'Standard In...'. The table is empty, displaying 'No items available.'.

**Fig 1: Business Partner Creation**

### Step 2: Create Contact Person for Customer

Created a contact person for The Bike Zone for communication.



The screenshot shows the SAP Business Partner creation interface for 'Athithiya Varman AK 499' (ID 1006491). The header includes the SAP logo, a back arrow, and the text 'Business Partner'. On the right, there are buttons for 'Edit', 'Copy', 'Open In', and a dropdown menu. Below the header, the business partner's name 'Athithiya Varman AK 499' and ID '1006491' are displayed. The main content area is divided into three tabs: 'Grouping: Internal number assignment (0001)', 'Standard Address', and 'Standard Communication'. The 'Standard Address' tab is active, showing the address 'USA' and contact information (Phone Number: --, Email: --). Below the tabs, there is a navigation bar with various categories: Basic Data, Roles, Address, Address-Independent Communication, Bank Accounts, Payment Cards, Identification, Contacts, Relationships, Classification, and Attachments. The 'General Information' section displays a grid of fields: Person Title (Mr. (0002)), First Name (Athithiya Varman), Last Name (AK 499), Search Term 1 (499), Search Term 2 (--), Business Partner Type (--), Gender (Male (2)), Academic Title (--), Authorization Group (Stakeholder: Visibility 0 (Unrestricted)), Natural Person (No), External BP Number (--), Birth Date (--), Birth Date Status (--), Birthplace (--), Archiving Flag (No), Created By (Learn-499 Learn-499 (LEARN-499)), Created On (06/25/2025), Last Changed By (--), and Last Changed On (--). The 'Notes' section shows a table with columns 'Language', 'ID', and 'Long Text'. The table is empty, displaying 'No items available.'.

**Fig 2: Contact Person Creation**

### Step 3: Create BP Relationship

Linked contact person to the customer as a BP relationship.

The screenshot shows the SAP Business Partner setup for 'The Bike Zone 499' (ID 1006490). The 'Contacts' tab is active, displaying a table with one contact: 1006491, AK 499, Athithiya Varman, valid from 06/25/2025 to 12/31/9999. Below this, the 'Relationships' section shows 'Business Partner Relationships' with no items available. The 'Classification' section shows 'No classes assigned'. The 'Attachments' section shows 'Attachments (0)' with a 'Select Doc. Type to Upload' dropdown set to 'GOS Attachments'.

Fig 3: BP Relationship Setup

### Step 4: Create Customer Request (Inquiry)

Logged an inquiry for 5 Deluxe Touring Bikes and 2 Professional Touring Bikes.

The screenshot shows the SAP 'Create Inquiry: Overview' screen. The 'Inquiry' field is empty, and the 'Net Value' is 0.00. The 'Sold to Party' and 'Ship to Party' fields are empty. The 'Cust. Reference' and 'Cust. Ref. Date' fields are empty. The 'Valid From' and 'Valid To' fields are empty. The 'Req. Deliv. Date' is 06/25/2025, and the 'Expect. Ord. Val.' is 0.00. The 'All Items' table is empty, with columns for Item, Material, Req. Segment, Order Quantity, SU, Alttn, Item Description, and Customer Material. A status bar at the bottom indicates 'Inquiry 10001437 has been saved'.

Fig 4: Customer Inquiry

# Step 5: Create Customer Quotation

Generated a quotation from the inquiry, applied \$50/item and 5% overall discount.

Fig 5: Quotation with Conditions (K004 + RA00)

# Step 6: Create Sales Order Referencing a Quotation

Copied quotation into sales order; confirmed delivery dates and discounts.

Fig 6: Sales Order Creation

**Step 7: Check Stock Status**  
Checked inventory availability for bikes in plant MI00.

SAP Stock - Multiple Materials

Search In: "Apps"

Standard

Material: 2 Items Plant: Global Bike Inc. (MI00) Storage Location: Finished Goods (FG00) Base Unit: Reporting Date: Adapt Filters (3)

Materials (2)

Material Description	P...	Plant Name	Storage ...	Description of Storage Lo...	Special Stoc...	Special Stock Type Descr...	Unrestricted Stock	Stock in Quality Inspection	Blocked Stock
Professional Touring Bike (black)	MI00	DC Miami	FG00	Finished Goods			78 EA	0 EA	0 EA
Deluxe Touring Bike (black)	MI00	DC Miami	FG00	Finished Goods			95 EA	0 EA	0 EA
							173 EA	0 EA	0 EA

**Fig 7: Stock Status Overview**

**Step 8: Track Sales Order**  
Used Track Sales Orders app to review fulfillment and availability.

SAP Track Sales Order Details

Search In: "Apps"

Fulfillment

Document Fulfillment Status

Fulfillment Standard order 792

Delivery Not Started / Not Relevant for Invoicing

Standard order 792

Not Delivered

Delivery Issue in Sales Orders

Due Next: 22 Days

Fulfillment Standard order 792

Delivery Not Started / Not Relevant for Invoicing

Shipping Status: Delivery Not Started Invoicing Status: Not Relevant for Invoicing Net Value: 20,092.90 USD Items: 2 Requested Delivery Date: 07/25/2025

Process Flow

Quotation Processing

Order Processing

Delivery Processing

Quotation 20000968 Fully Reviewed Valid To 07/25/2025

Standard order 792 Open Requested Delivery On 07/25/2025 Not Shipped

Planned Delivery Delivery Planned For 07/17/2025

Items

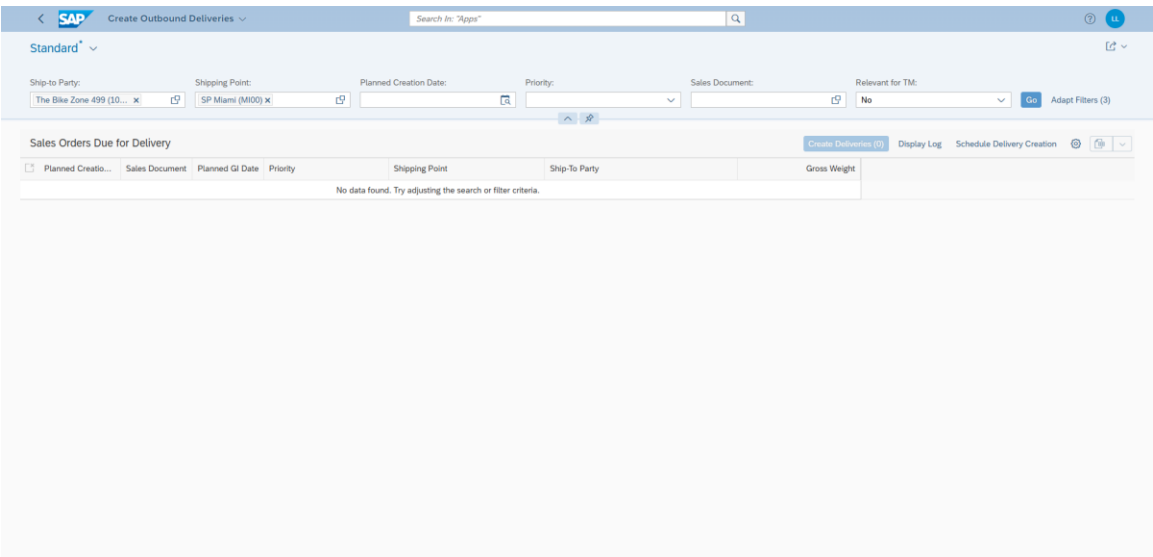
Item Processing Details (2) Standard

Item	Product	Order Quantity	Shipped Quantity	Invoiced Quantity
10	Deluxe Touring Bike (black) (DXTR1499)	5 EA	0 EA	0 EA
20	Professional Touring Bike (black) (PRTR1499)	2 EA	0 EA	0 EA

**Fig 8: Track Sales Order**

## Step 9: Start Delivery Process

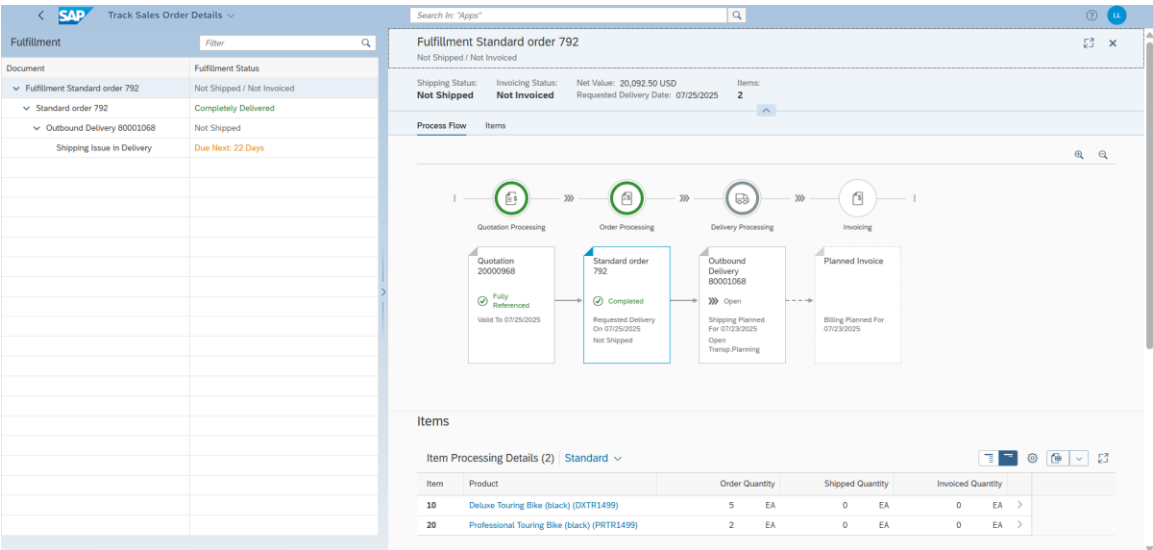
Created outbound delivery from sales order using MI00 shipping point.



**Fig 9:** Delivery Document Creation

## Step 10: Track Sales Order Again

Checked updated status: partially delivered, billing planned.



**Fig 10:** Updated Sales Order Status

Entered picking quantity, storage location FG00, and posted goods issue.

Entered picking quantity, storage location FG00, and posted goods issue.

SAP

Pick Outbound Delivery ▾

Search In: "Apps"

Delivery: 80001068

Delivery Header

Delivery: 80001068

Actual GI Date: 06/26/2025  
Planned GI Date: 07/23/2025

Gross Weight: 57,170 G  
Net Weight: 57,170 G

Picking Status: Completely Processed  
Confirmation Status: Not Relevant

Show More

2 of 2 Picking

GI 4900040351

0

Status: GI Posted  
Material Document: 4900040351

Planned GI Date: 07/23/2025  
Gross Weight: 57,170 G  
Net Weight: 57,170 G  
Volume: 0  
Priority: Normal Item

Ship-To Party: The Bike Zone 499 (1006490)  
Address: 2144 N Orange Ave, Orlando FL 32804, USA

Reverse GI

**Fig 11: PGI Completion**

## Step 12: Check Stock Status Again

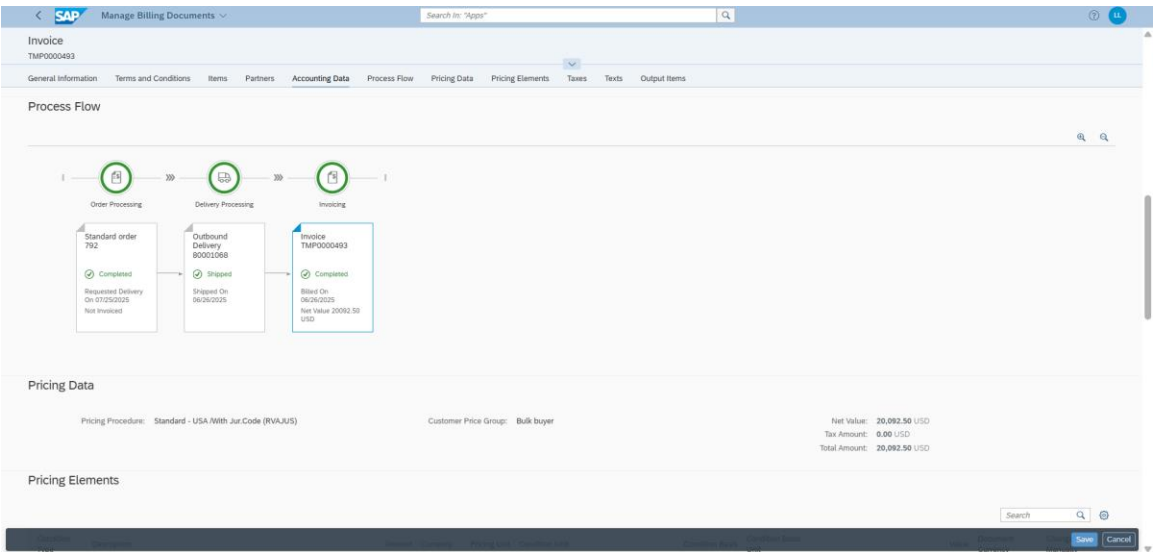
Verified stock reduced post-GI for both bike materials.

[illegible]

**Fig 12: Stock Level Post PGI**

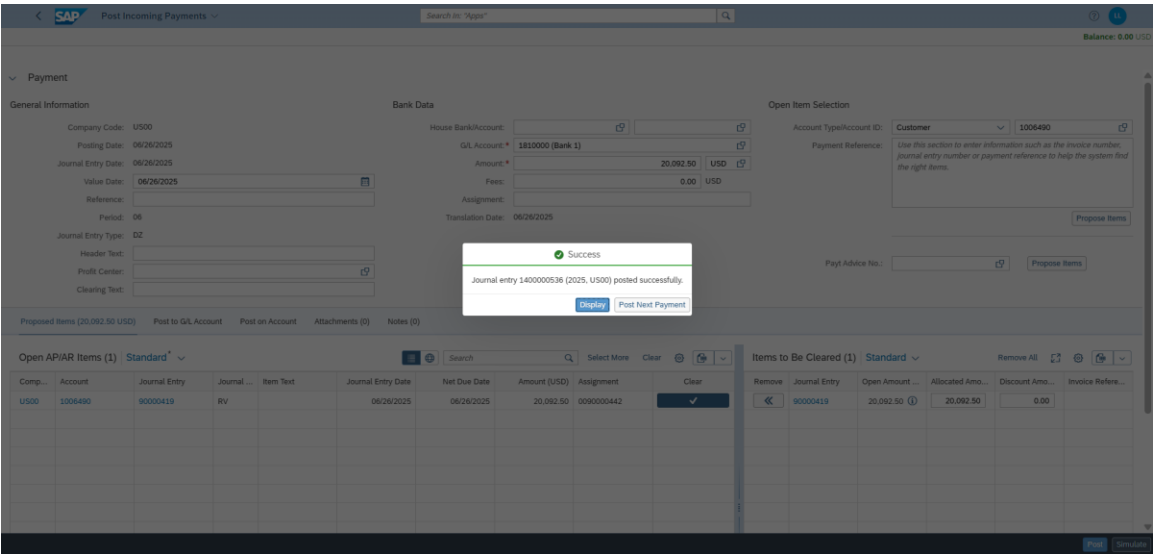


**Step 13: Create Billing Document**  
Created invoice from outbound delivery.



**Fig 13: Invoice Generation**

**Step 14: Display Billing Document and Post Invoice**  
Posted invoice and confirmed customer billing status.



**Fig 14: Customer Invoice Posting**

# Step 15: Post Receipt of Customer Payment

Recorded incoming payment (journal entry type DZ) for full amount.

Manage Journal Entries

Search in: "Apps"

Journal Entry (1400000536) - Entry View

Header

Attachments

Notes

Related Documents

Journal Entry Date: 06/26/2025  
Posting Date: 06/26/2025  
Posting Period: 6 / 2025  
Journal Entry Type: DZ (Customer Payment)

Company Code: US00 (Global Bike Inc.)  
Transaction Currency: USD

Reference: -  
Reference Document Type: BKPF (Actg Doc Direct Inpt)  
Header Text: -  
Journal Entry Created By: LEARN-499  
Entered At (Local Time): 06/26/2025, 15:52

Line Items (2) Standard

Posting View L...	GL Account	Debit	Credit
000001	1810000 (Bank 1)	20,092.50 USD	0.00 USD
000002	1200000 (Trade receivables)	0.00 USD	20,092.50 USD

Tax Standard

Tax Code	GL Account	Tax Base Amount	Debit	Credit	Tax Rate
No data available					

Edit

Create Correspondence

Reverse

New

Display Changes

Select Currency

Fig 15: Payment Receipt Posting

# Step 16: Review Document Flow

Tracked complete document flow from inquiry to payment using Track Sales Order.

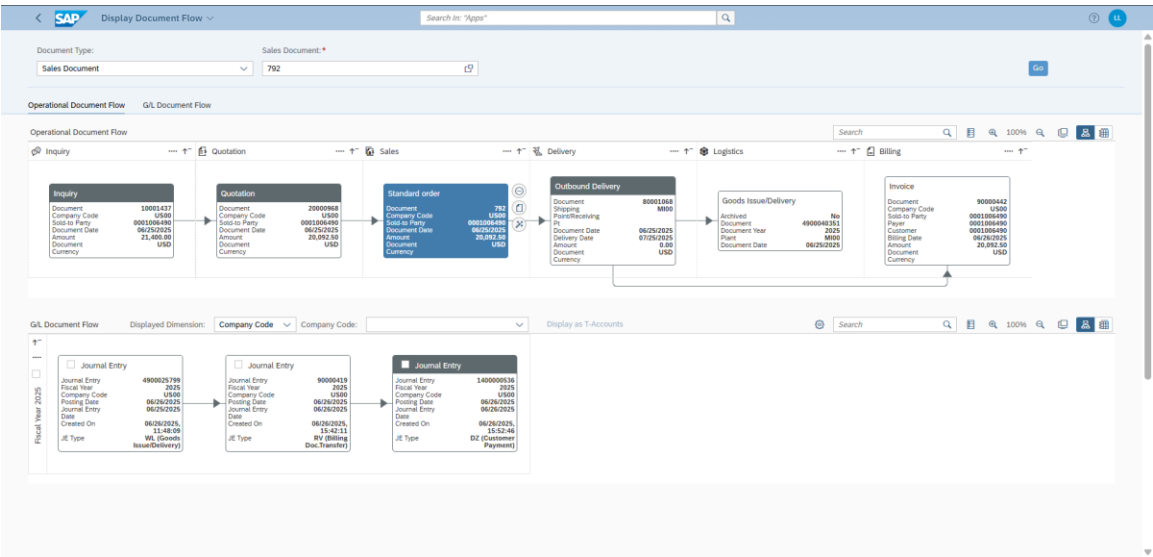


Fig 16: Full Document Flow View

## 5. Key Learning from 24-Step Execution

This detailed exercise helped understand:

- Full integration of SD with MM and FI in SAP
- How pricing procedures are defined and applied in real-time
- Importance of master data consistency across sales areas
- Fiori navigation and hands-on order fulfillment lifecycle
- Handling of logistics and financial follow-through for customer orders

## 6. Screenshots and Figures

Screenshots have been labeled and embedded step-by-step above. Each screenshot serves as visual proof of execution and matches the described business task.

## 7. Conclusion

This SAP S/4HANA SD task enabled hands-on exposure to end-to-end ERP business process cycles. Working through 24 clearly defined steps gave confidence in system navigation, configuration principles, and practical execution. The knowledge from this case study prepares for real-world SAP SD consulting scenarios.

## 8. References

- SAP Global Bike Case Study (UCC)
- SAP Fiori Reference Library
- SAP Help Portal – <https://help.sap.com>