SD 1: Display Customer Master Data

Exercise Use the SAP Fiori Launchpad in order to display a customer. **Time** 10 min

Task Global Bike has several customers in the USA. Display one customer from the USA (Beantown Bikes).

Name (Position) Maria Diaz (Sales Person 1)

To display a customer, use the app *Maintain Business Partner*.

Fiori App

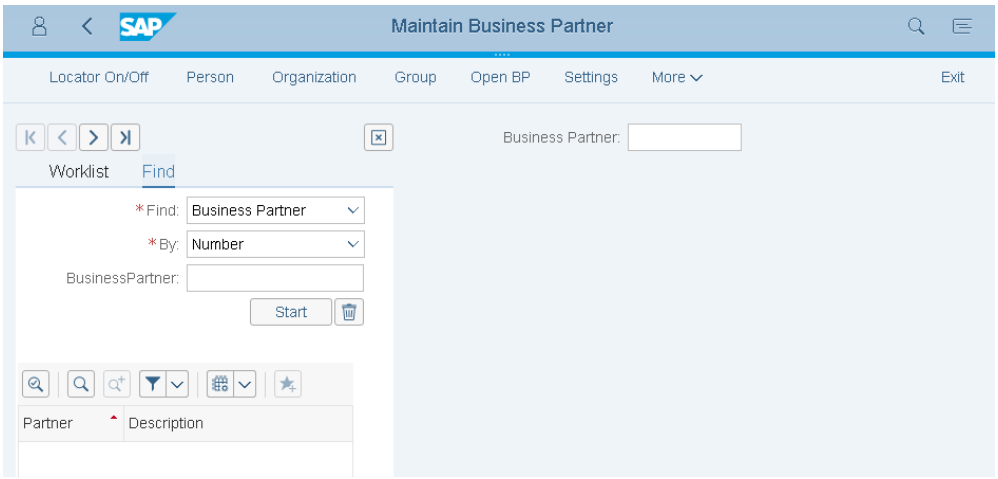
In the next screen, the SAP system expects you to enter a business partner number that is used to represent customers or suppliers.

A business partner is an organization (firm, branch office), person or a group of persons or organizations in which your company has a business interest.

You can create and manage your business partners centrally for different business transactions. This is of prime interest if a business partner plays different roles for a company, such as sold-to party and ship-to party. You can create a business partner in different business partner roles. During the course of the business relationship, the business partner can assume other business partner roles.

General data is created only once for a business partner. This general data is 'independent' of the role the partner performs in the different business processes in S/4HANA. If a partner performs in a new role, we only need to add that their master data because the general data will remain unchanged.

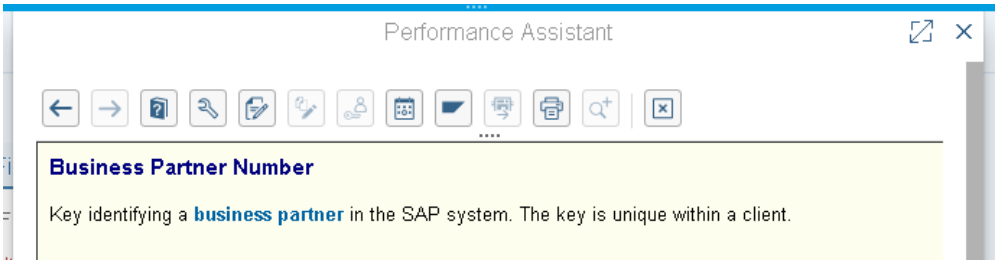
This prevents data being created and stored redundantly.



You can use the SAP ad-hoc help to have the system explain particular fields on the screen. Position your cursor in the *Business Partner* field and press **F1**.

In the pop-up Performance Assistant you will get information about the field business partner. Make sure, that you have deactivated the pop-up blocker.

F1



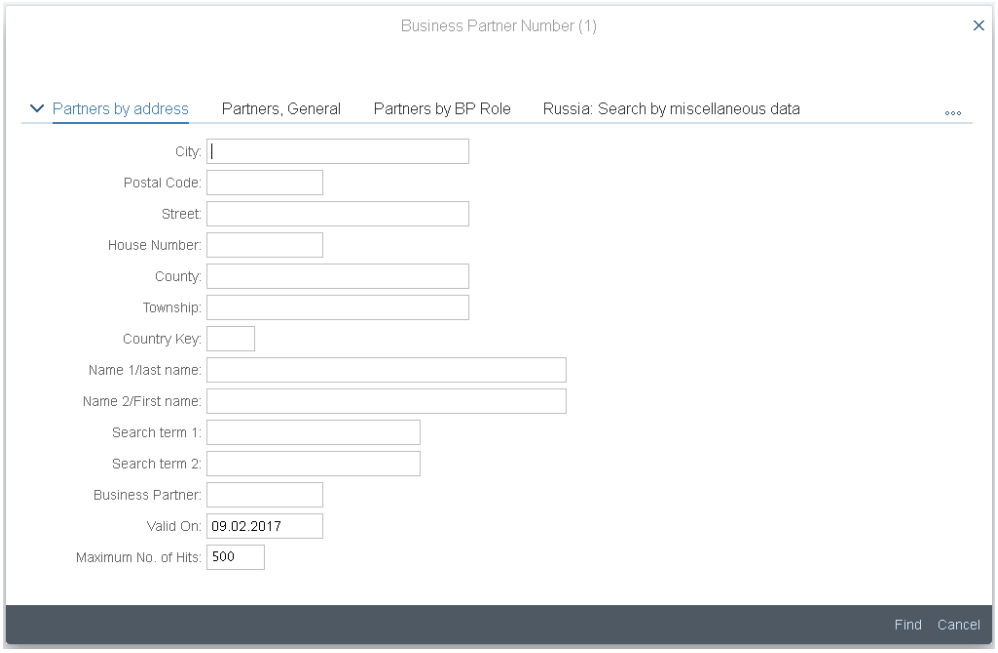
According to the SAP definition, SAP expects you to enter the unique Business Partner Number.

Business Partner

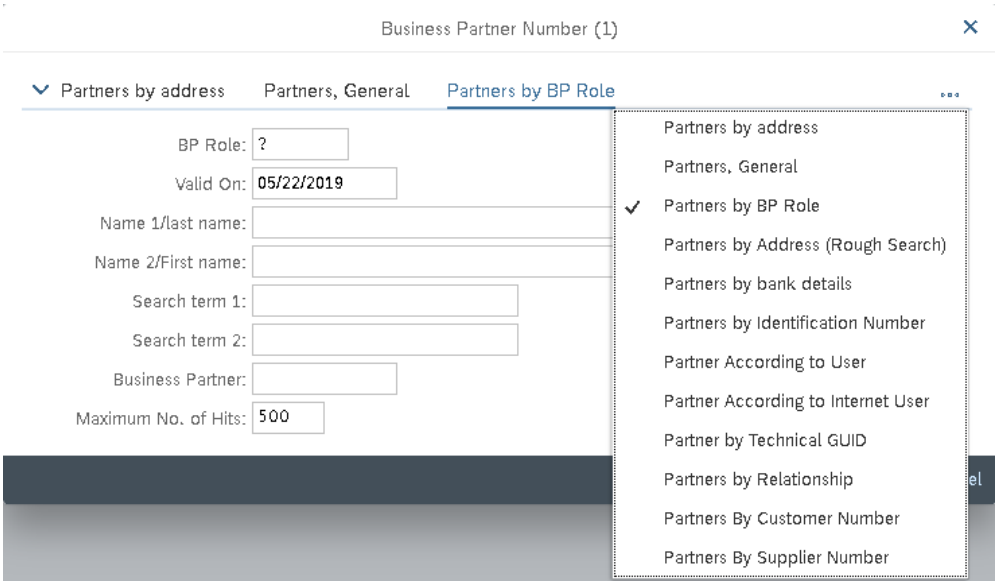
Press the ✕-button in the upper right corner of the screen in order to close the window.

Since you do not know any business partner (and in our case a customer number) in the Global Bike company, you need to find one. In order to do so, position your cursor once again in the field *Business Partner* and press **F4**.

F4

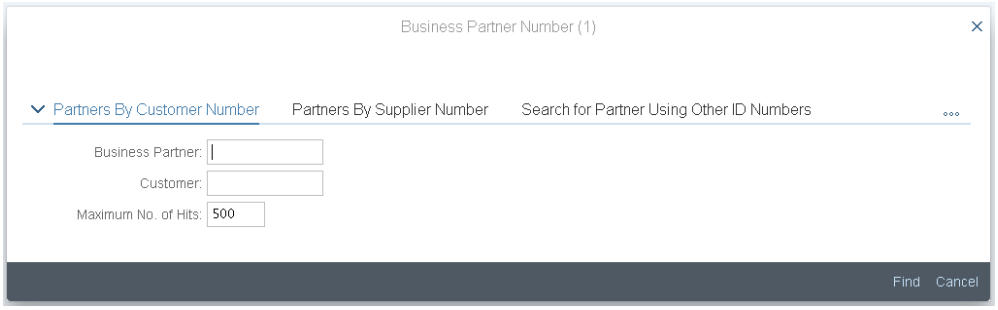


The tabs allow you to enter different search criteria. The values in the text boxes are used to filter the search operation. In the tab *Partners By Customer Number* you can search for your customer.



Use the F4 help in the field *Customer*.

F4



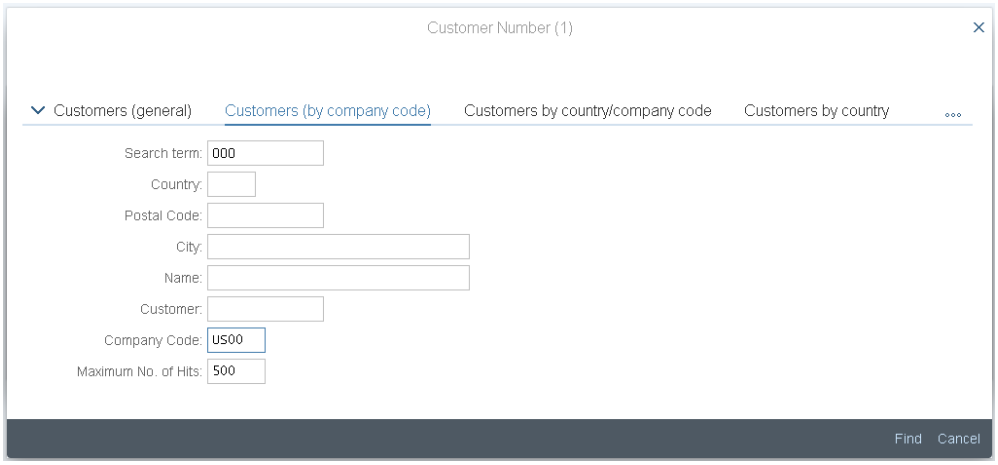
Go to the tab *Customers (by company code)*. There you can enter all information you have about a customer. In our case, please enter the **three-digit number (###)** you were given by your instructor into the field Search term.

###

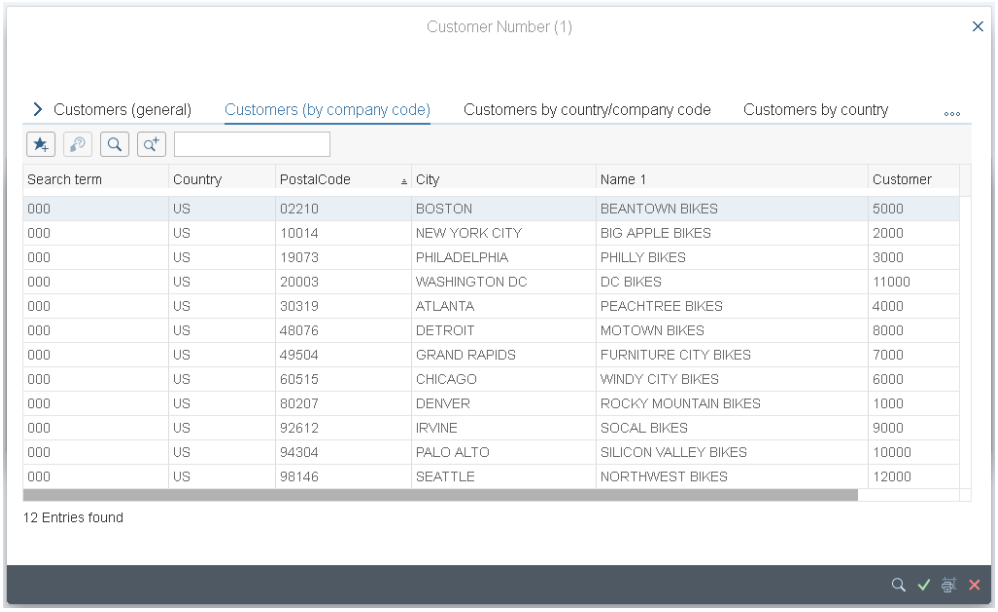
Please note Each time the curriculum material requests you to type in ###, please enter the three-digit number you received from your instructor. Since each participant receives his or her own master data, the three-digit number serves to distinguish between the individual data sets. Please remember that all participants work in the same Global Bike company and if you do not select any search criteria, you will see all master data (just like in a real company). If you wish to see all 1000 master data entries for each client, you can leave the field "Search term" empty.

After having entered your three-digit number (###) into the field Search term, position your cursor in the field Company Code. Enter there **US00** for Global Bike Inc.

###
US00

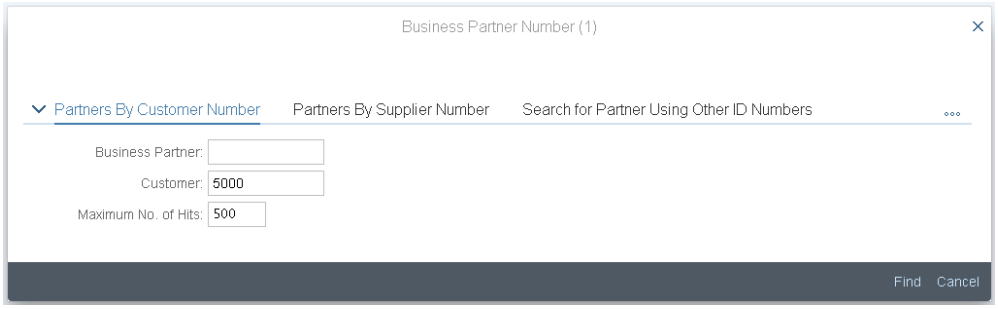


Subsequently, click Find or press Enter. Consequently, the following screen will come up. Please note that your customer number might be different from the number presented on the following screen.



You can select **Beantown Bikes** by double-click. When doing so, the search result screen will close and **your customer account number (5###)** of Beantown Bikes will be displayed in the *Customer* field. Please note that your customer account number might be different from the number presented in the following screen.

Beantown Bikes

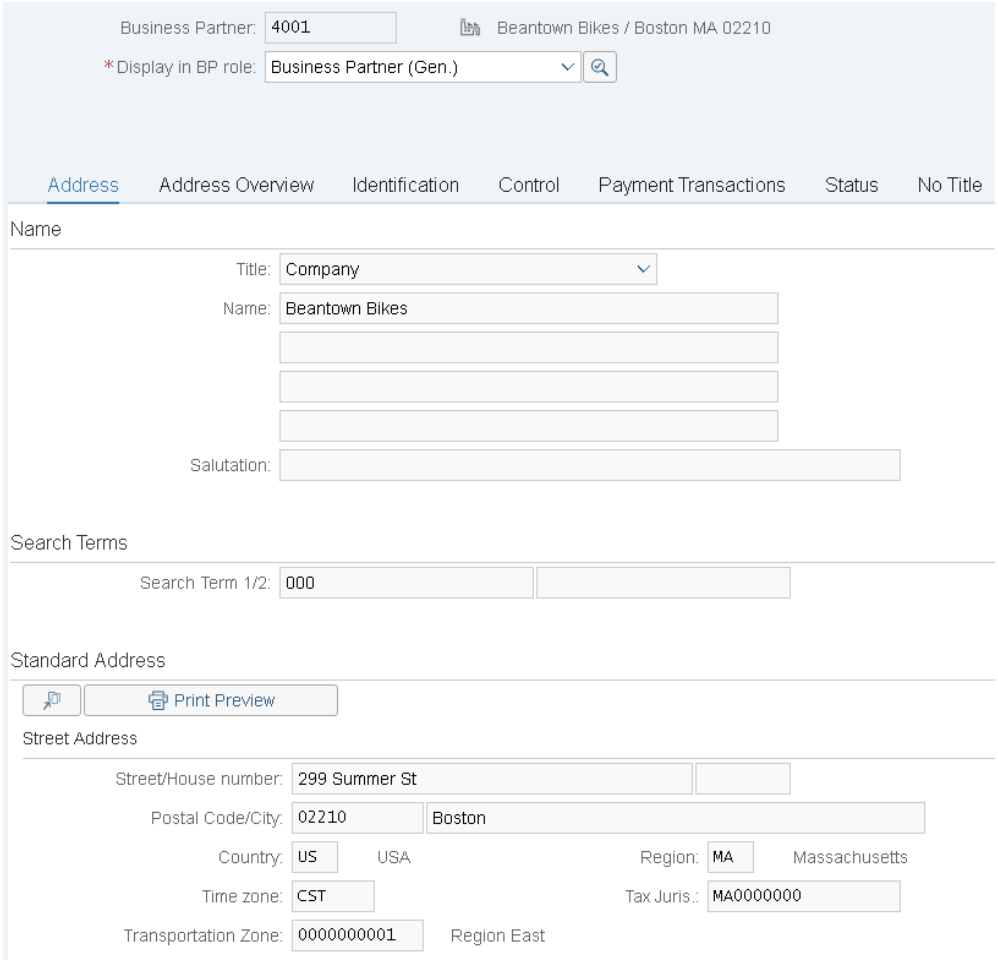


Click Find or Enter. The system choose you the Business Partner number from your customer.

Partner	Customer
4001	5000

In order to display the master data for Beantown Bikes click on ✓.

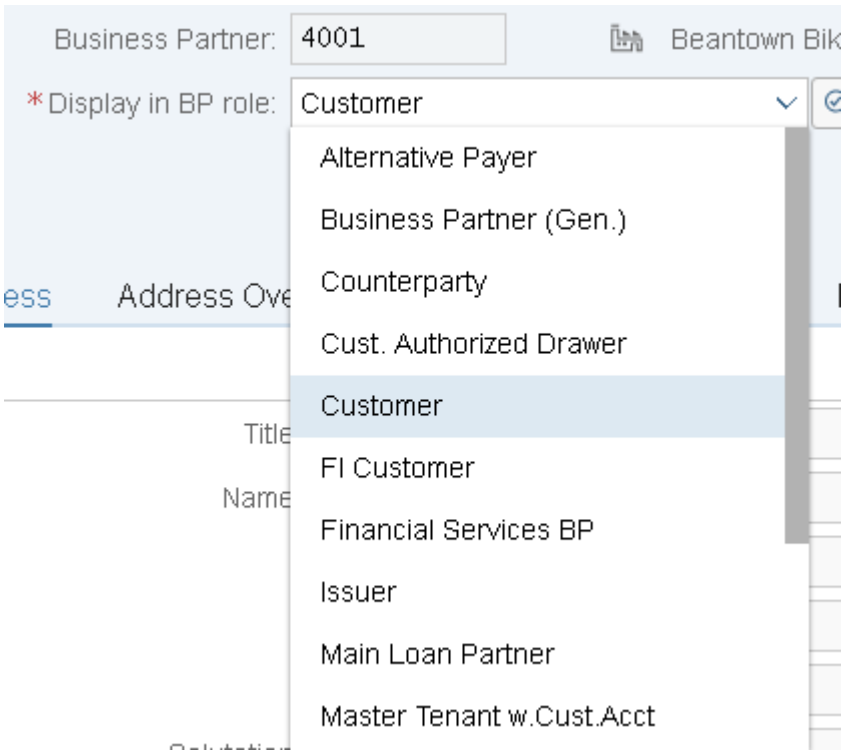
The following screen will come up:



This screen displays the general data of your customer Beantown Bike. In the context of the SAP system, this data implies all information about the customer that are relevant for the whole company such as global names and the address. Click the other tabs in order to see further global data about Beantown Bikes.

In the drop down menu *Display in BP role* choose **Customer.**

Customer



Click on the button

to get information about the sales data from your customer Beantown Bikes. If you do not see the button choose **More → Sales and Distribution**.

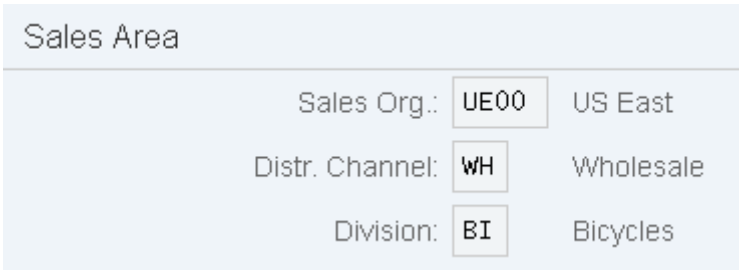
Two types of customer data are stored about a customer – sales data and accounting data. The customer master data is created in three groups, or views – general, accounting, and sales. Customers can be created centrally, meaning that all views are generated concurrently, or responsibility can be distributed so that different personnel in the accounting and sales areas are responsible for creating and maintaining the data in their respective views.

Your customer can have different information in the views accounting and sales, but the general data are the same. You want to check the data for the Sales Organization in **US East**, the Distribution Channel **Wholesale** and the Division **Bicycles**.

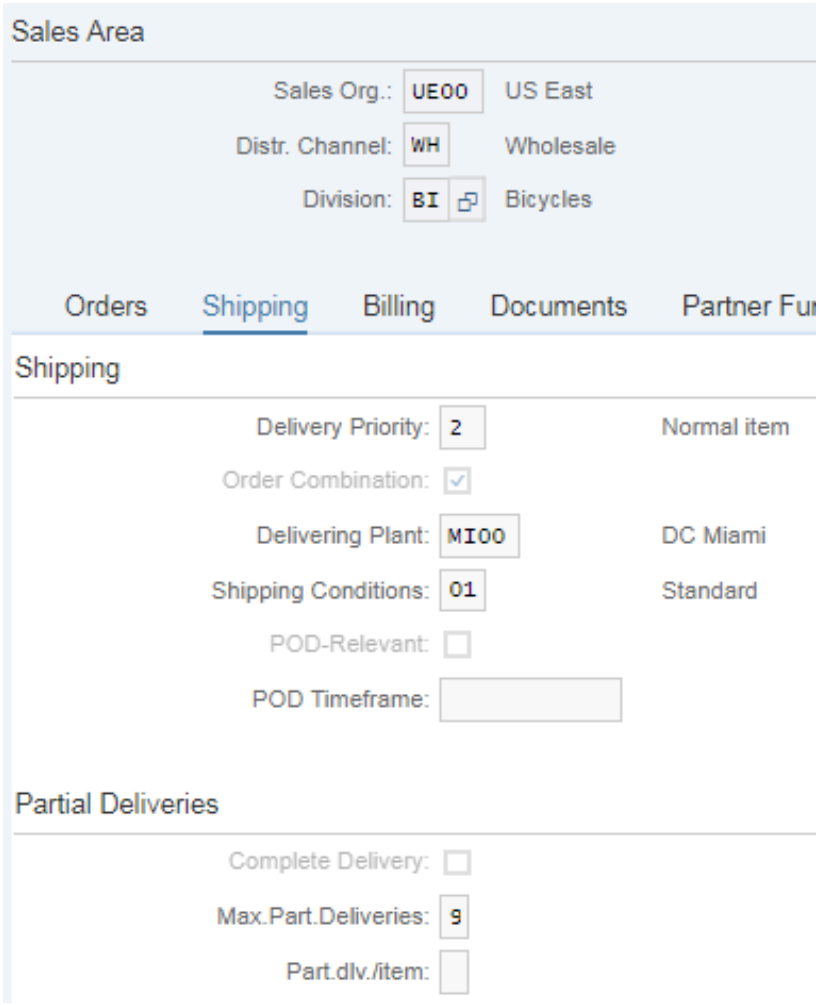
UE00
WH
BI

Use the **F4** help in each field to enter the necessary data and press enter.

F4



Navigate to the tab *Shipping*, there you find information about the delivery priority, the delivering plant, shipping conditions.



What does the **9** in the field Max. Part. Deliveries stand for? Explain why it is useful to limit it?

_____

_____

_____

Click on the home icon to return to the Fiori Launchpad overview.

SD 2: Display Customer Order

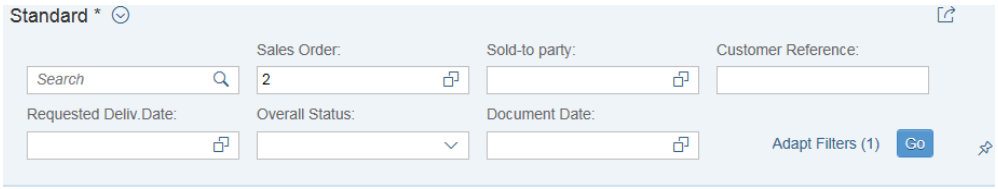
Exercise Use the SAP Fiori Launchpad in order to display a customer order. **Time** 10 min

Task Display a customer order for black Deluxe Touring Bikes.

Name (Position) David Lopez (East Rep. Miami)

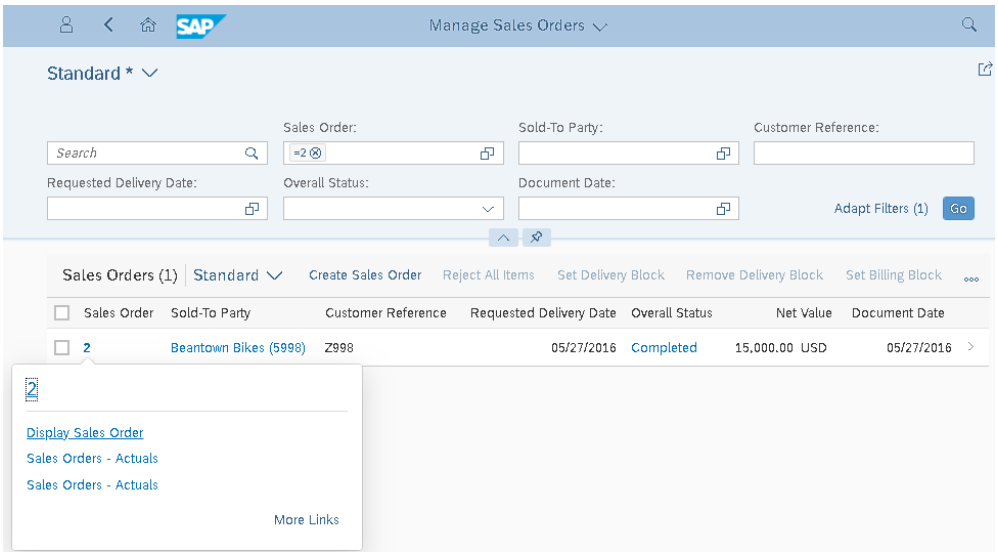
Use the app *Manage Sales Order* to display a sales order. Fiori App

Enter **2** for Sales Order and press Enter. 2



In the column Sales Order click on 2 and select *Display Sales Order*.

If you don't see *Display Sales Order* click on *More Links*. Search for Display Sales Order select it and clikc on OK.



The order number is the number that clearly identifies the sales document. Generally, there are different types of sales documents in the SAP S/4HANA System:

- Request
- Offer
- Order
- Master Contract
- Complaints.

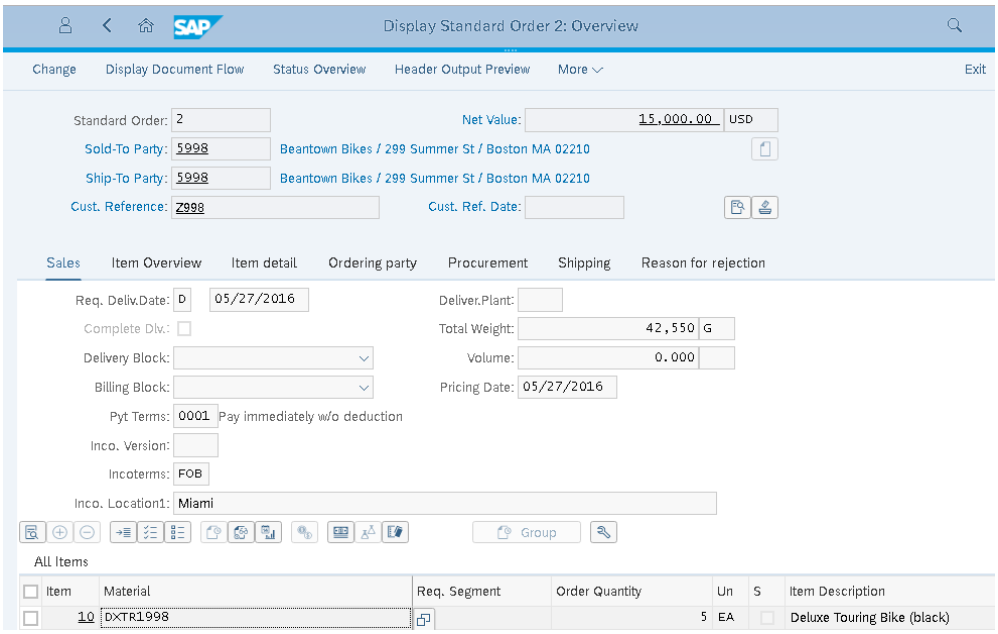
In the next screen, all details of the order placed by the company Beantown Bikes from Boston are displayed.

By means of this sales document, you can observe the typical division of the sales documents. They are composed of

- Document header
- Document items.

The document header consists of data that is valid for the complete sales document, whereas the document items reflect the data of the individual goods that are listed in the sales document.

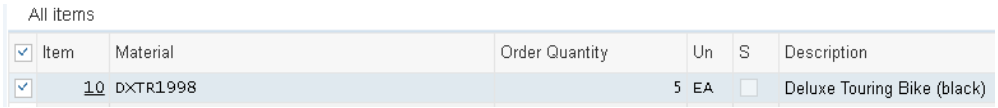
In the following screen, you can see the document header for the sales document with the number 2. As you can see, this sales order is listed under the Cust. Reference number Z998 and its net value amounts to $15,000.00



Please note The customer reference number must not be the same as the number of the sales document (in this case the Standard Order number). The customer reference number can be typed in manually. The sales document number is generated automatically when you save the document.

In the Item Overview, you can see that the order only contains the product Deluxe Touring Bike in black. Using this order, Beantown Bike ordered five bicycles of this bicycle.

Please select the line presenting the Deluxe Touring Bike (black).



Subsequently, please click the symbol Item conditions .

This screen shows that each bicycle costs $3,000.00 and that neither discounts nor supplements were determined. It furthermore shows that Global Bikes makes a profit of $1,600.00 per bicycle sold.

Click on the home icon to return to the Fiori Launchpad overview.

☐

SD 3: Display Outbound Delivery Document for Sales Order

Exercise Use the SAP Fiori Launchpad in order to display an outbound delivery.

Time 10 min

Task In the context of the sales order process, after creating the order, the outbound delivery takes place. As a next step, please display the outbound delivery document.

Name (Position) Sergey Petrov (Warehouse Employee Miami)

Use the App *Manage Outbound Deliveries* to display an outbound delivery document for Sales Order.

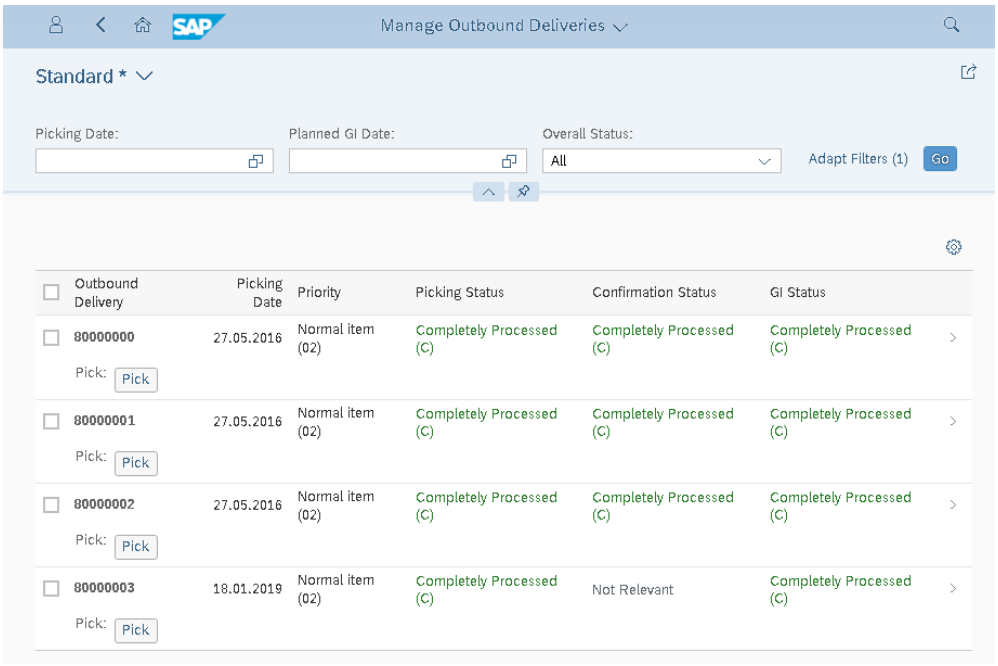
Fiori App

Change the Overall Status to **All** and click on

.

All

You can see different deliveries. Please note, that it is possible, that your screen shows more deliveries.



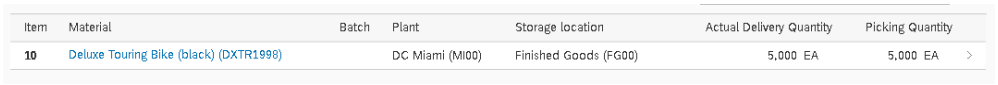
Select the Outbound Delivery number

and choose in order to view the document of the sales order introduced in the previous step.

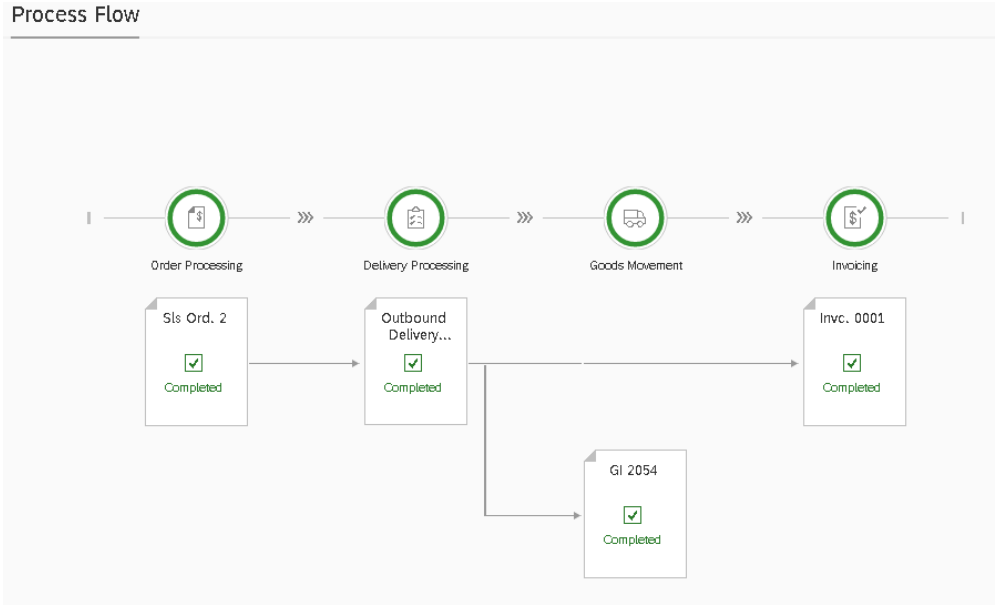
80000001

You can see that the Picking and Conformation Status is Completely Processed and the weight is 42.550 grams.

In the section *Item overview* can you see the 5 bikes mentioned in the previous step.



Scroll to the section *Prozess Flow.*



Click on the home icon to return to the Fiori Launchpad overview.

SD 4: Display Billing Document

Exercise Use the SAP Fiori Launchpad in order to display billing documents.

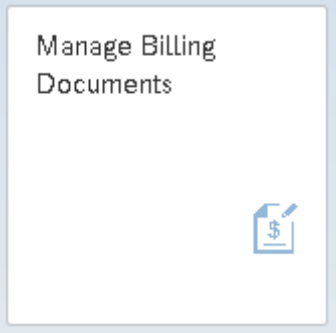
Time 5 min

Task After the creation of the outbound delivery for the bicycles to the customer, a billing document was created for the customer. Display the billing document in the system.

Name (Position) Stephanie Bernard (Billing clerk)

Choose the app *Manage Billing Document* to display a billing document.

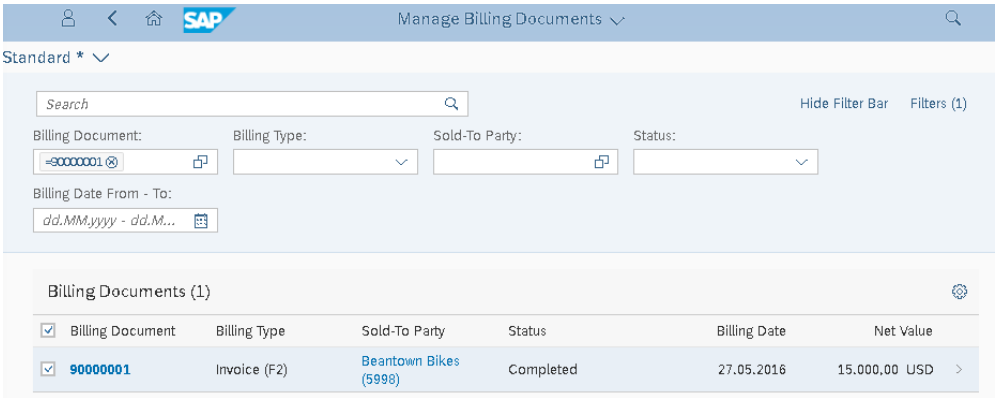
Fiori App



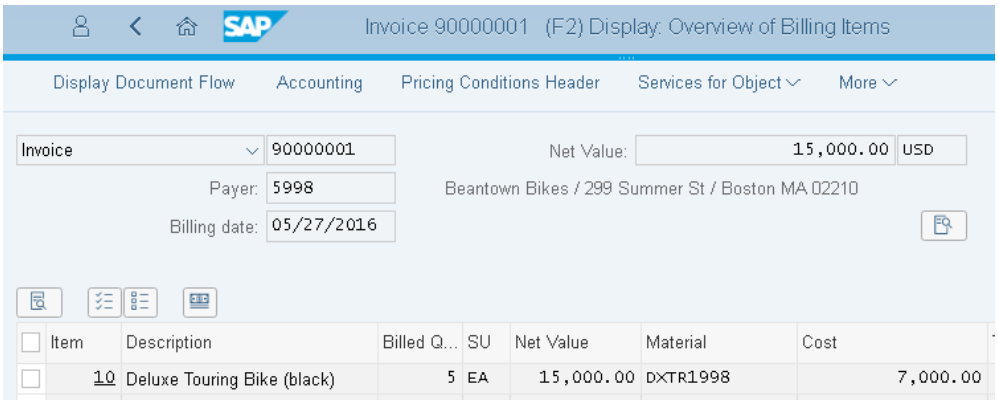
Enter **90000001** as Billing document number in order to display the billing document for the sales order. Hit Enter.

90000001

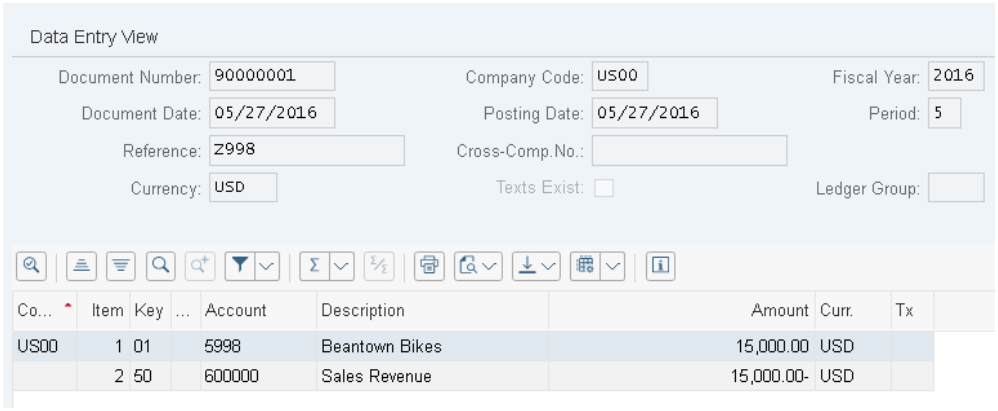
Select your Billing Document and choose Display.



As you can see, there is a billing document that shows the costs incurred of $7,000.00 plus profit. This billing document thus represents a claim for payment of $15,000.00 for Beantown Bikes.



If you select the document and press Accounting, you will be able to see the document from the accounting perspective and thus the accounts involved.



Click on the home icon to return to the Fiori Launchpad overview.

SD 5: Analysis Process Flow

Exercise Use the SAP Fiori Launchpad in order to view the Process Flow. **Time** 15 min

Task There are various possibilities to display the Process Flow. In this case you will select the Process Flow, for example with the app Outbound Delivery, Manage Stock or in this case you will use the *Material Documents Overview* App.

Name (Position) David Lopez (East Rep. Miami)

Document Flow

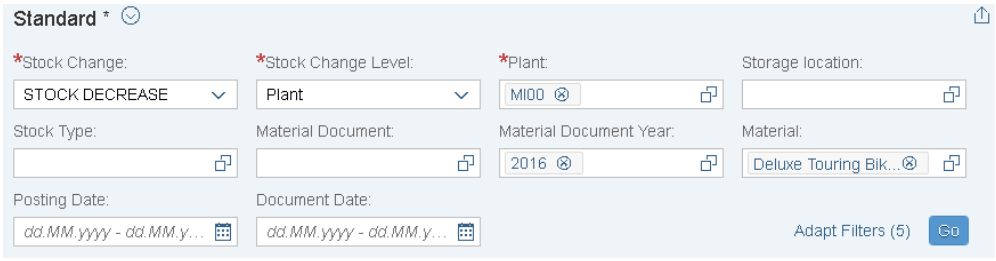
SAP provides a Process Flow tool that tracks the entire sales transaction process from beginning to end. The Process Flow tool is extremely powerful because it can be used at any point in the sales order process. It provides an audit trail (booking control) for the sales order and all follow-up documents chronologically. Furthermore, it is possible to navigate into these documents and to display them in detail (drill down).

Choose the App *Material Documents* Overview to analyze the Process Flow.

Fiori App

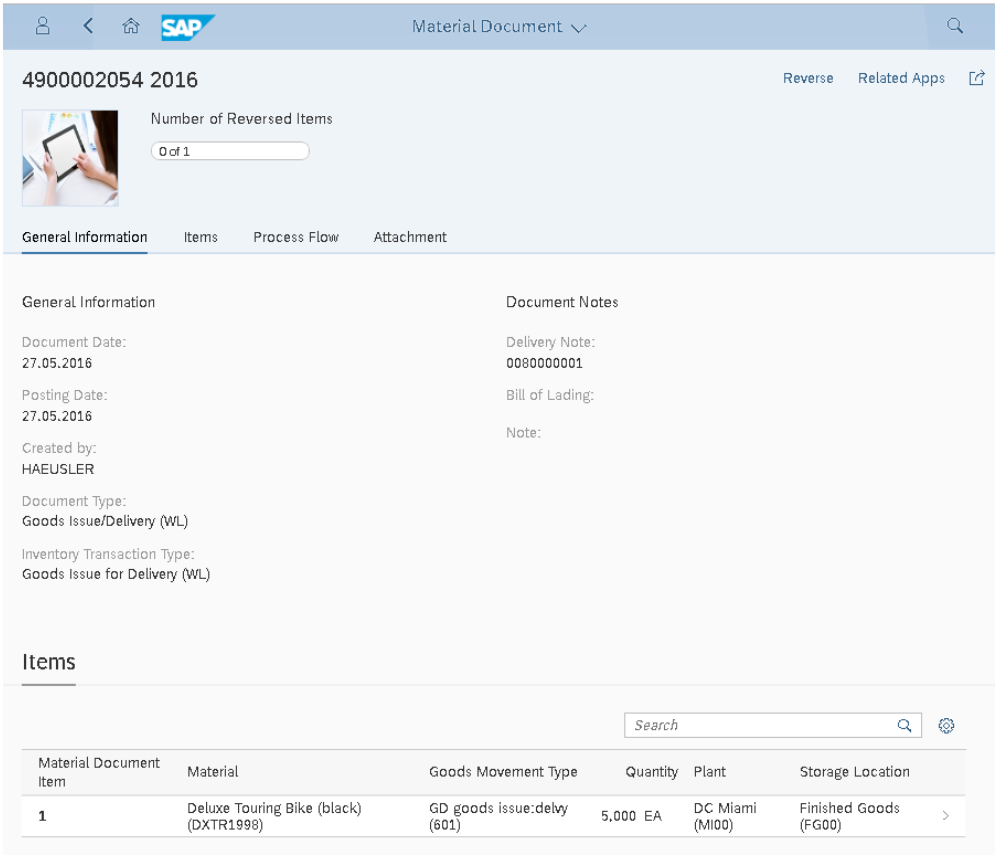
Stock Decrease
MI00
2016
DXTR1998

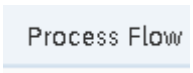
Select **Stock Decrease** for Stock Change. Enter **MI00** for Plant, **2016** for Material Document Year and **DXTR1998** for Material. Compare your screen with following screenshot an Choose Go.



You will see that your search criteria will give you one item back.

Click on > to come to a document overview page. There are information about the General Data like the Material Document Year, the Posting Date and who created the order.



Select the tab Document Flow 

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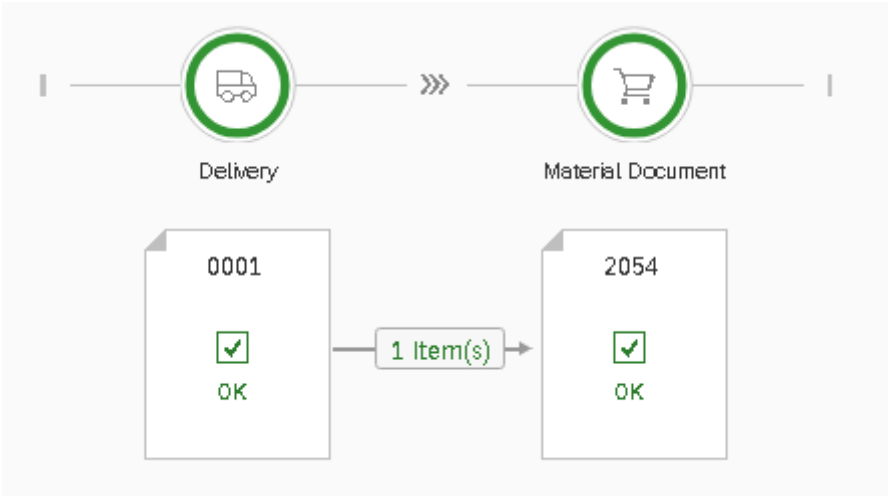
The Document Flow for the sales order of Beantown Bikes should look as follows.



Click on the home icon to return to the Fiori Launchpad overview.