

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

Business Partner Number (1) ✕

▼ Partners by address Partners, General Partners by BP Role Russia: Search by miscellaneous data ...

City:

Postal Code:

Street:

House Number:

County:

Township:

Country Key:

Name 1/last name:

Name 2/First name:

Search term 1:

Search term 2:

Business Partner:

Valid On:

Maximum No. of Hits:

Find Cancel

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.

Business Partner Number (1) ✕

▼ Partners by address Partners, General Partners by BP Role ...

BP Role: Valid On:

Name 1/last name:

Name 2/First name:

Search term 1:

Search term 2:

Business Partner:

Maximum No. of Hits:

Partners by address
Partners, General
✓ Partners by BP Role
Partners by Address (Rough Search)
Partners by bank details
Partners by Identification Number
Partner According to User
Partner According to Internet User
Partner by Technical GUID
Partners by Relationship
Partners By Customer Number
Partners By Supplier Number

Find Cancel

Use the F4 help in the field *Customer*.

F4

Business Partner Number (1) ✕

▼ Partners By Customer Number Partners By Supplier Number Search for Partner Using Other ID Numbers ...

Business Partner:

Customer:

Maximum No. of Hits:

Find Cancel

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

Customer Number (1)

▼ Customers (general) Customers (by company code) Customers by country/company code Customers by country ...

Search term: 000

Country:

Postal Code:

City:

Name:

Customer:

Company Code: US00

Maximum No. of Hits: 500

Find Cancel

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.

Customer Number (1)

> Customers (general) Customers (by company code) Customers by country/company code Customers by country ...

Search term Country PostalCode City Name 1 Customer

000	US	02210	BOSTON	BEANTOWN BIKES	5000
000	US	10014	NEW YORK CITY	BIG APPLE BIKES	2000
000	US	19073	PHILADELPHIA	PHILLY BIKES	3000
000	US	20003	WASHINGTON DC	DC BIKES	11000
000	US	30319	ATLANTA	PEACHTREE BIKES	4000
000	US	48076	DETROIT	MOTOWN BIKES	8000
000	US	49504	GRAND RAPIDS	FURNITURE CITY BIKES	7000
000	US	60515	CHICAGO	WINDY CITY BIKES	6000
000	US	80207	DENVER	ROCKY MOUNTAIN BIKES	1000
000	US	92612	IRVINE	SOCAL BIKES	9000
000	US	94304	PALO ALTO	SILICON VALLEY BIKES	10000
000	US	98146	SEATTLE	NORTHWEST BIKES	12000

12 Entries found

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

Business Partner Number (1)

▼ Partners By Customer Number Partners By Supplier Number Search for Partner Using Other ID Numbers ...

Business Partner:


Customer:

Maximum No. of Hits:


Find Cancel


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:

Business Partner: 4001  Beantown Bikes / Boston MA 02210

*Display in BP role: Business Partner (Gen.) 

Address Address Overview Identification Control Payment Transactions Status No Title

Name

Title: Company 



Name: Beantown Bikes

Salutation:

Search Terms

Search Term 1/2: 000

Standard Address

  Print Preview

Street Address

Street/House number: 299 Summer St

Postal Code/City: 02210 Boston

Country: US USA Region: MA Massachusetts


Time zone: CST Tax Juris.: MA00000000



Transportation Zone: 0000000001 Region East

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

Business Partner: 4001  Beantown Bikes

* Display in BP role: Customer  

- Alternative Payer
- Business Partner (Gen.)
- Counterparty
- Cust. Authorized Drawer
- Customer**
- FI Customer
- Financial Services BP
- Issuer
- Main Loan Partner
- Master Tenant w.Cust.Acct

ess Address Overview

Title

Name

Relationship

Click on the button **Sales and Distribution** 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**.

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


Sales Area	
Sales Org.:	UE00 US East
Distr. Channel:	WH Wholesale
Division:	BI Bicycles

UE00
WH
BI

F4

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

Sales Area

Sales Org.: US East
 Distr. Channel: Wholesale
 Division:  Bicycles

Orders **Shipping** Billing Documents Partner Fun


Shipping

Delivery Priority: Normal item
 Order Combination: ☒
 Delivering Plant: DC Miami
 Shipping Conditions: Standard
 POD-Relevant: ☐
 POD Timeframe:

Partial Deliveries

Complete Delivery: ☐
 Max.Part.Deliveries:
 Part.dlv./item:

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.

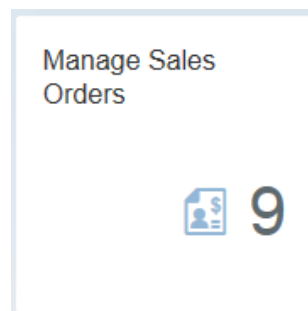
Time 10 min

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

Standard *

<input type="text" value="Search"/>	Sales Order: <input type="text" value="2"/>	Sold-to party: <input type="text"/>	Customer Reference: <input type="text"/>
Requested Deliv. Date: <input type="text"/>	Overall Status: <input type="text"/>	Document Date: <input type="text"/>	Adapt Filters (1) <input type="button" value="Go"/>

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 click on **OK**.

Standard * ▾

Search Sales Order: Sold-To Party: Customer Reference:

Requested Delivery Date: Overall Status: Document Date: Adapt Filters (1) Go

Sales Orders (1) | Standard ▾ Create Sales Order Reject All Items Set Delivery Block Remove Delivery Block Set Billing Block ...

<input type="checkbox"/>	Sales Order	Sold-To Party	Customer Reference	Requested Delivery Date	Overall Status	Net Value	Document Date
<input type="checkbox"/>	2	Beantown Bikes (5998)	Z998	05/27/2016	Completed	15,000.00 USD	05/27/2016 >

2

Display Sales Order

Sales Orders - Actuals

Sales Orders - Actuals

More Links

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

Display Standard Order 2: Overview

Change Display Document Flow Status Overview Header Output Preview More ▾ Exit

Standard Order: 2 Net Value: 15,000.00 USD

Sold-To Party: 5998 Beantown Bikes / 299 Summer St / Boston MA 02210

Ship-To Party: 5998 Beantown Bikes / 299 Summer St / Boston MA 02210

Cust. Reference: 2998 Cust. Ref. Date:

Sales Item Overview Item detail Ordering party Procurement Shipping Reason for rejection

Req. Deliv.Date: D 05/27/2016 Deliver.Plant:

Complete Delv.: Total Weight: 42,550 G

Delivery Block: Volume: 0.000

Billing Block: Pricing Date: 05/27/2016

Pyt Terms: 0001 Pay immediately w/o deduction

Inco. Version:

Incoterms: FOB

Inco. Location1: Miami

All Items

Item	Material	Req. Segment	Order Quantity	Un	S	Item Description
10	DXTR1998		5	EA		Deluxe Touring Bike (black)


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).


All Items

<input checked="" type="checkbox"/>	Item	Material	Order Quantity	Un	S	Description
<input checked="" type="checkbox"/>	10	DXTR1998	5	EA		Deluxe Touring Bike (black)

Subsequently, please click the symbol Item conditions .

<input type="checkbox"/>	I...	CnTy	Name	Amount	Crcy	per	U...	Condition Value	Curr.
<input type="checkbox"/>		PR00	Price	3,000.00	USD	1	EA	15,000.00	USD
<input type="checkbox"/>			Gross Value	3,000.00	USD	1	EA	15,000.00	USD
<input type="checkbox"/>			Discount Amount	0.00	USD	1	EA	0.00	USD
<input type="checkbox"/>			Rebate Basis	3,000.00	USD	1	EA	15,000.00	USD
<input type="checkbox"/>			Net Value for Item	3,000.00	USD	1	EA	15,000.00	USD
<input type="checkbox"/>			Net Value 2	3,000.00	USD	1	EA	15,000.00	USD
<input type="checkbox"/>			Total	3,000.00	USD	1	EA	15,000.00	USD
<input type="checkbox"/>		SKTO	Cash Discount	0.000	%			0.00	USD
<input type="checkbox"/>		VPRS	Internal price	1,400.00	USD	1	EA	7,000.00	USD
<input type="checkbox"/>			Standard - USA Wwith	1,600.00	USD	1	EA	8,000.00	USD

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.

Manage Outbound Deliveries

Standard *

Picking Date:

Planned GI Date:

Overall Status:

All

Adapt Filters (1)

<input type="checkbox"/> Outbound Delivery	Picking Date	Priority	Picking Status	Confirmation Status	GI Status	
<input type="checkbox"/> 80000000	27.05.2016	Normal item (02)	Completely Processed (C)	Completely Processed (C)	Completely Processed (C)	>
Pick:						
<input type="checkbox"/> 80000001	27.05.2016	Normal item (02)	Completely Processed (C)	Completely Processed (C)	Completely Processed (C)	>
Pick:						
<input type="checkbox"/> 80000002	27.05.2016	Normal item (02)	Completely Processed (C)	Completely Processed (C)	Completely Processed (C)	>
Pick:						
<input type="checkbox"/> 80000003	18.01.2019	Normal item (02)	Completely Processed (C)	Not Relevant	Completely Processed (C)	>
Pick:						

Select the Outbound Delivery number ☒ 80000001 and choose in order to view the document of the sales order introduced in the previous step.

80000001

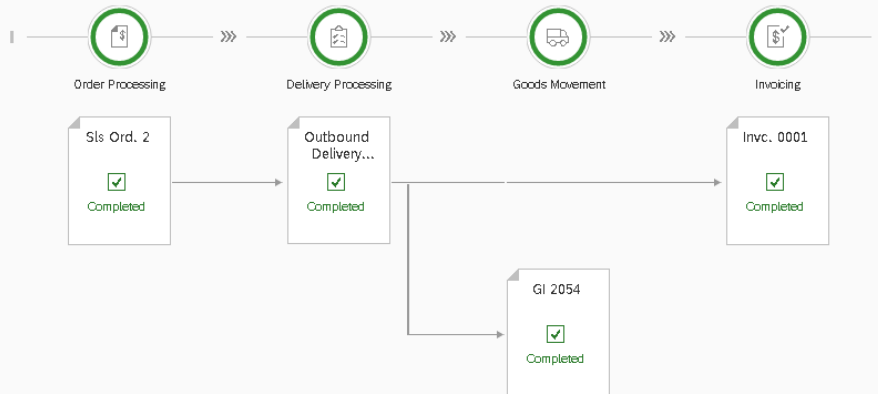
You can see that the Picking and Confirmation Status is Completely Processed and the weight is 42.550 grams.


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

Item	Material	Batch	Plant	Storage location	Actual Delivery Quantity	Picking Quantity	
10	Deluxe Touring Bike (black) (DXTR1998)		DC Miami (MI00)	Finished Goods (FG00)	5,000 EA	5,000 EA	>

Scroll to the section *Prozess Flow*.

Process Flow



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



SD 4: Display Billing Document

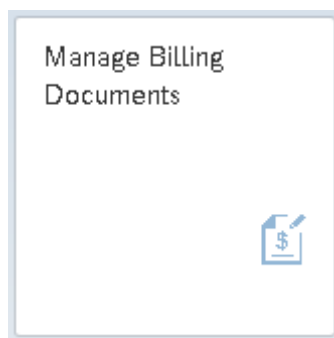
Exercise Use the SAP Fiori Launchpad in order to display billing documents.

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**.

Billing Document	Billing Type	Sold-To Party	Status	Billing Date	Net Value
90000001	Invoice (F2)	Beantown Bikes (5998)	Completed	27.05.2016	15,000.00 USD

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.

Invoice 90000001 (F2) Display: Overview of Billing Items

Display Document Flow Accounting Pricing Conditions Header Services for Object More

Invoice: 90000001 Net Value: 15,000.00 USD

Payer: 5998 Beantown Bikes / 299 Summer St / Boston MA 02210

Billing date: 05/27/2016

Item	Description	Billed Q...	SU	Net Value	Material	Cost
10	Deluxe Touring Bike (black)	5	EA	15,000.00	DXTR1998	7,000.00

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.

Data Entry View


Document Number: 90000001 Company Code: US00 Fiscal Year: 2016

Document Date: 05/27/2016 Posting Date: 05/27/2016 Period: 5

Reference: Z998 Cross-Comp.No.: Texts Exist: Ledger Group:

Currency: USD

Co...	Item	Key	Account	Description	Amount	Curr.	Tx
US00	1	01	5998	Beantown Bikes	15,000.00	USD	
	2	50	600000	Sales Revenue	15,000.00	USD	

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)


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).

Document Flow

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




Fiori App




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 and Choose .


Stock Decrease
MI00
2016
DXTR1998


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

Material Documents (1)						
Material Document	Material Document Year	Material	Plant	Storage location	Posting Date	Stock Type
4900002054	2016	Deluxe Touring Bike (black) (DXTR1998)	DC Miami (MI00)	Finished Goods (FG00)	05/27/2016	Unrestricted-Use Stock (01)

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.


Material Document 


4900002054 2016
Reverse Related Apps 




Number of Reversed Items
0 of 1

General Information Items Process Flow Attachment

General Information
Document Date:
27.05.2016
Posting Date:
27.05.2016
Created by:
HAEUSLER
Document Type:
Goods Issue/Delivery (WL)
Inventory Transaction Type:
Goods Issue for Delivery (WL)

Document Notes
Delivery Note:
0080000001
Bill of Lading:
Note:

Items

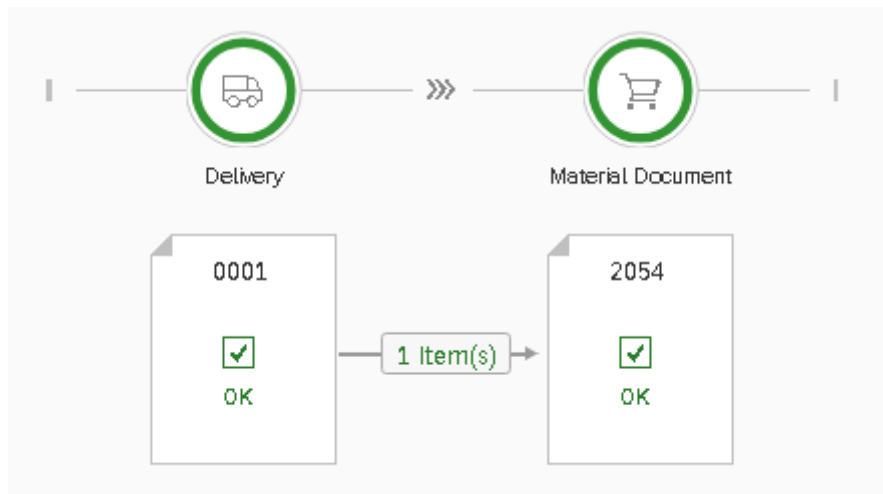
Search  


Material Document Item	Material	Goods Movement Type	Quantity	Plant	Storage Location
1	Deluxe Touring Bike (black) (DXTR1998)	GD goods issue:delvry (601)	5,000 EA	DC Miami (MI00)	Finished Goods (FG00)

Select the tab Document Flow

Process Flow

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.

