

FIT5101 Enterprise Systems



Lecture 05

- ❖ Sales & Distribution (Sell)
- ❖ CRM

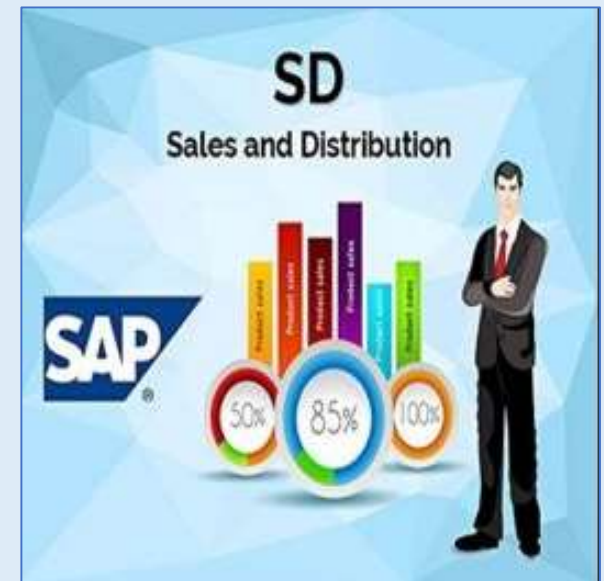
Lecturer: Stephen Paull
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Unit Topics (Subject to change)

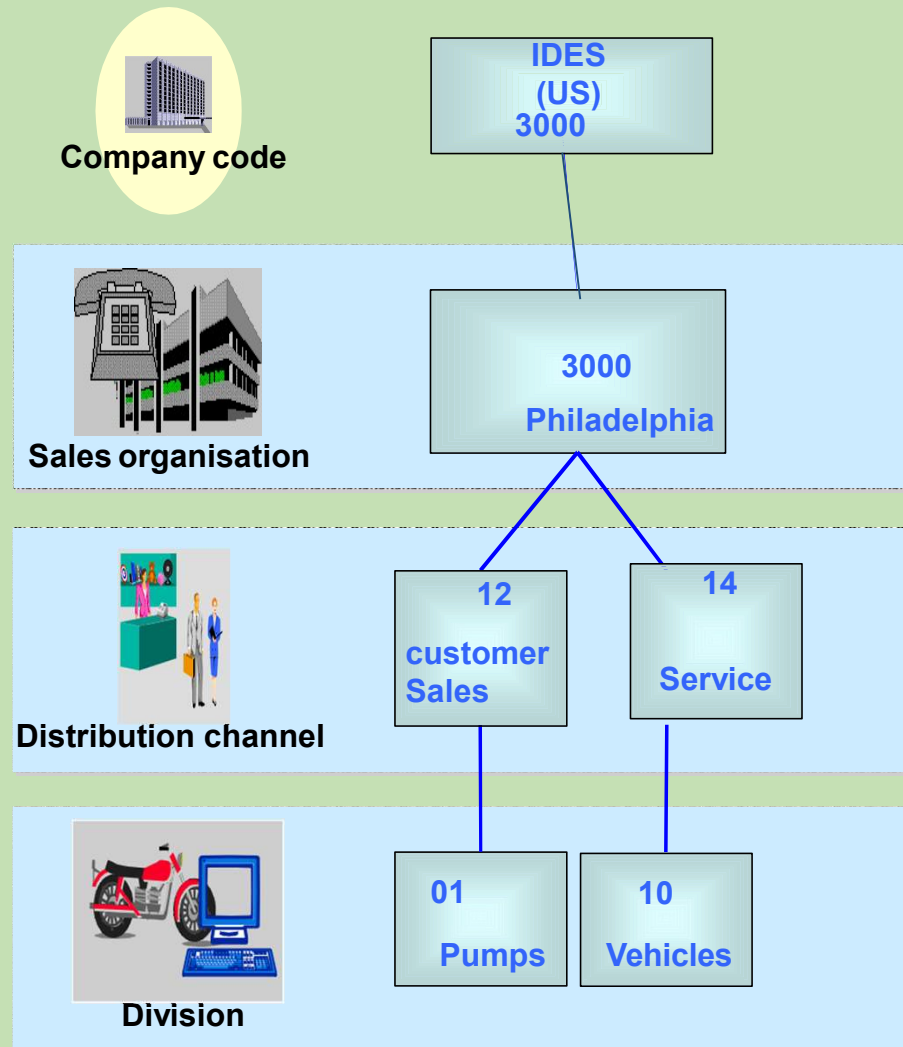
Week	Date (W/C)	Lecture	Tutorial	Assessment
1	1/3	Introduction	Introduction	
2	8/3	Business Functions & Processes	Business Functions	
3	15/3	ERP Structures	SAP Introduction	Ass 1 Rel
4	22/3	Materials Management & Procurement	Materials Management	S A P W O R K S H O P S
5	29/3	Sales & Distribution	Procurement	
	5/4	BREAK		
6	12/4	Production Planning	Sales & Distribution	
7	19/4	Financials	Production Planning	
8	26/4	Process Integration & Modelling	Financials	
9	3/5	ERP Implementation	Process Modelling	Ass 2 Due 7/5
10	10/5	Current Technologies	Work on Assignment	
11	17/5	Future Trends	Sample eExam / Review	
12	24/5	Review	??	Ass 3 Due 28/5

Objectives

- **Discuss sales and distribution in the SAP ERP system.**
- **Describe how SAP ERP processes a standard sales order**
- **Describe the benefits of customer relationship management (CRM) software**



SD Organisational Structure



SAP – SD Organisational Structure

- Client
 - An independent environment in the system
- Company Code
 - Smallest org unit for which you can maintain a legal set of books
 - Can have more than one sales organization
- Sales Organisation
 - An organisational unit responsible for the sale of certain products or services.
 - The responsibility of a sales organisation may include legal liability for products and customer claims
 - A sales organisation is uniquely assigned to a company code.
- Distribution Channel
 - The way in which products or services reach the customer
 - Typical examples of distribution channels are wholesale, retail, or direct sales
- Division
 - A way of grouping materials, products, or services

SD Master Data

Create Standard Order: Overview

Standard Order: Net value: 15,000.00 USD

Sold-To Party: Philly Bikes / 3999 West Chester Pike / Philadelphia PA 19073

Ship-To Party: Philly Bikes / 3999 West Chester Pike / Philadelphia PA 19073

PO Number: PO date: 04/23/2010

Customer Master

Sales | Item overview | Item detail | Ordering party | Procurement | Shipping | Reason for rejection

Req. deliv. date: D 04/26/2010 Deliver. Plant:

☐ Complete delv. Total Weight: 42,550.6

Delivery block: Volume: 0.000

Billing block: Pricing date: 04/23/2010

Payment card: Exp. date:

Card Verif. Code:

Payment terms: 0001 Pay immediately w/o Incoterms FOB Miami

Order reason:

Material Master

Sales Condition

All items

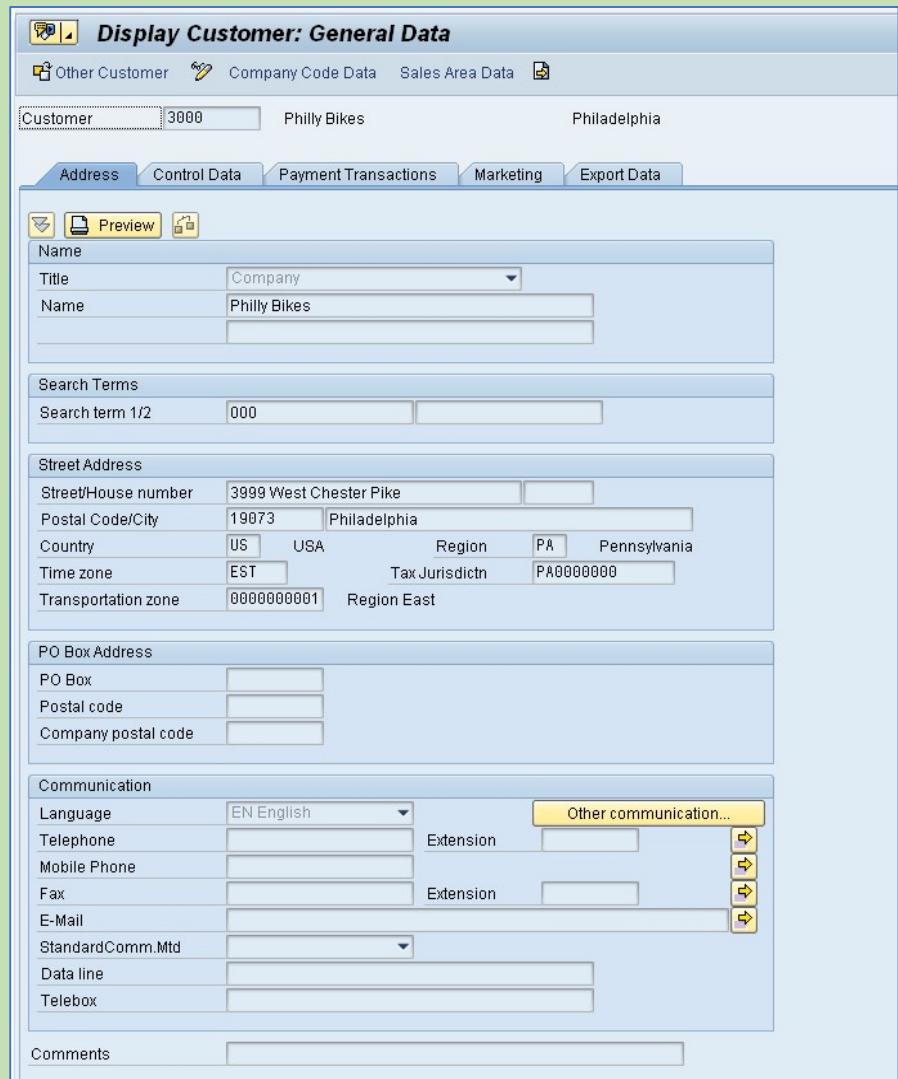
Item	Material	Order Quantity	Un	S	Description	ItCa	DGIP	HL	Item	First date	Plant	Batch	CnTy	Amount	Crry	Net price	per	U...	Net value
	0DXTR1000	1	EA		Deluxe Touring Bike (black)	TAN				04/26/2010	MI00				USD	3,000.00	1	EA	
										04/26/2010									
										04/26/2010									
										04/26/2010									
										04/26/2010									
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Data entry fields in Order Entry Screen

Data entry field	Explanation
Sold-To Party	Identification number assigned to customer
PO Number	The number assigned by the customer to the sales transaction; this is different from the sales order number assigned by the seller (using SAP ERP) to the sales transaction. In a paper process, the purchase order number is usually a sequential number preprinted on the purchase order form
Req. deliv. date	The delivery date for the order requested by the customer; the SAP ERP system will evaluate the ability to meet this date and suggest alternatives, if necessary
Material	The identification number assigned in the SAP ERP system to the item requested by the customer
Order Quantity	The number of units of the material the customer is requesting

Customer Master Data

- Customer Master
 - Contains all of the information necessary for processing orders, deliveries, invoices and customer payment
 - Every customer MUST have a master record
- The customer master information is divided into 3 areas:
 - General Data
 - Company Code Data
 - Sales Area Data



The screenshot displays the 'Display Customer: General Data' form in SAP. At the top, there are tabs for 'Other Customer', 'Company Code Data', and 'Sales Area Data'. The 'Customer' field is set to '3000', with 'Philly Bikes' as the company name and 'Philadelphia' as the sales area. Below this, there are tabs for 'Address', 'Control Data', 'Payment Transactions', 'Marketing', and 'Export Data'. The 'Address' tab is active, showing fields for 'Name' (Title: Company, Name: Philly Bikes), 'Search Terms' (Search term 1/2: 000), 'Street Address' (Street/House number: 3999 West Chester Pike, Postal Code/City: 19073 Philadelphia, Country: US USA, Region: PA Pennsylvania, Time zone: EST, Tax Jurisdiction: PA00000000, Transportation zone: 0000000001 Region East), 'PO Box Address' (PO Box, Postal code, Company postal code), and 'Communication' (Language: EN English, Telephone, Mobile Phone, Fax, E-Mail, StandardComm.Mtd, Data line, Telebox, and a 'Comments' field). There are also buttons for 'Preview' and 'Other communication...'.

Material Master Data

- Material Master
 - Contains all the information a company needs to manage about a material
 - It is used by most components within the SAP system
 - Sales and Distribution
 - Materials Management
 - Production
 - Plant Maintenance
 - Accounting/Controlling
 - Quality Management
 - Material master data is stored in functional segments called Views

The screenshot displays the SAP 'Display Material' interface for material DXTR1000, a 'Deluxe Touring Bike (black)'. The interface is organized into several tabs: 'Basic data 1', 'Basic data 2', 'Sales: sales org. 1', 'Sales: sales org. 2', and 'Sales: sales org. 3'. The 'Basic data 1' tab is active, showing the following sections:

- General data:** Includes fields for Base Unit of Measure (EA, each), Material Group (BIKES), Old material number, Ext. Matl Group, Division (BI), Lab/Office, Product allocation, Prod.hierarchy, X-plant matl status, Valid from, and GenItemCatGroup (NORM, Standard item). There is also a checkbox for 'Assign effect. vals'.
- Material authorization group:** Includes a field for Authorization Group.
- Dimensions/EANs:** Includes fields for Gross Weight (8,510), Weight unit (6), Net Weight (8,510), Volume (0.000), Volume unit, Size/dimensions, EAN/UPC, and EAN Category.
- Packaging material data:** Includes a field for Matl Grp Pack.Matls.
- Basic Data Texts:** Includes a field for Languages Maintained (0), a button for 'Basic Data Text', and a Language dropdown menu.

Condition Master Data (Pricing)

- Condition master data includes:
 - Prices
 - Surcharges
 - Discounts
 - Freights
 - Taxes
- You can define the condition master to be dependent on various data:
 - Material specific
 - Customer specific

Sales Document Item: 10 Item category: TAN Standard Item

Material: DXTR1000 Deluxe Touring Bike (black)

Sales A Sales B Shipping Billing Document **Conditions** Account assignment Sc

Qty: 5 EA Net: 15,000.00 USD Tax: 0.00

N...	CnTy	Name	Amount	Crcy	per	U...	Condition value	Curr.
PR00		Price	3,000.00	USD		1 EA	15,000.00	USD
		Gross Value	3,000.00	USD		1 EA	15,000.00	USD
		Discount Amount	0.00	USD		1 EA	0.00	USD
		Rebate Basis	3,000.00	USD		1 EA	15,000.00	USD
		Net Value for Item	3,000.00	USD		1 EA	15,000.00	USD
		Net Value 2	3,000.00	USD		1 EA	15,000.00	USD
		Total	3,000.00	USD		1 EA	15,000.00	USD
SKT0		Cash Discount	0.000	%			0.00	USD
VPRS		Internal price	1,400.00	USD		1 EA	7,000.00	USD
		Standard - USA WWith	1,600.00	USD		1 EA	8,000.00	USD

Sales Document Item: 10 Item category: TAN Standard Item

Material: PRTR1000 Professional Touring Bike (black)

Sales A Sales B Shipping Billing Document **Conditions** Account assignment Sc

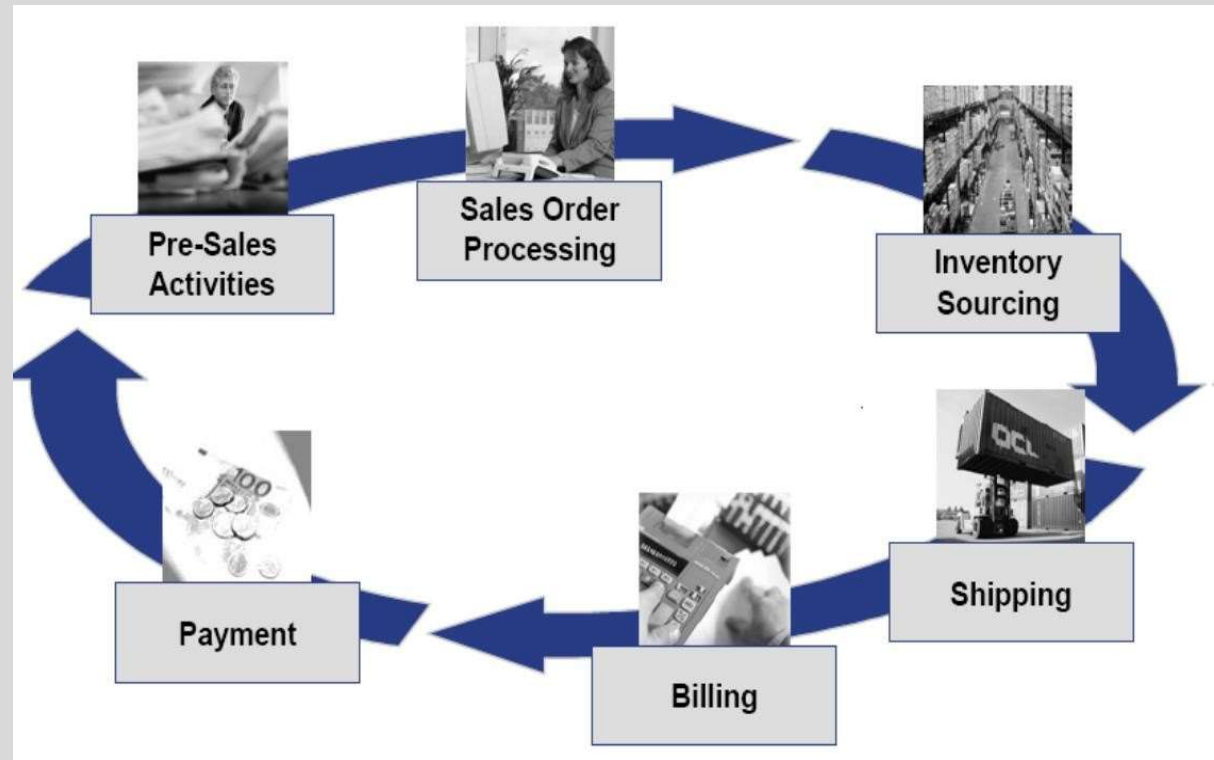
Qty: 5 EA Net: 16,000.00 USD Tax: 0.00

N...	CnTy	Name	Amount	Crcy	per	U...	Condition value	Curr.
PR00		Price	3,200.00	USD		1 EA	16,000.00	USD
		Gross Value	3,200.00	USD		1 EA	16,000.00	USD
		Discount Amount	0.00	USD		1 EA	0.00	USD
		Rebate Basis	3,200.00	USD		1 EA	16,000.00	USD
		Net Value for Item	3,200.00	USD		1 EA	16,000.00	USD
		Net Value 2	3,200.00	USD		1 EA	16,000.00	USD
		Total	3,200.00	USD		1 EA	16,000.00	USD
SKT0		Cash Discount	0.000	%			0.00	USD
VPRS		Internal price	1,500.00	USD		1 EA	7,500.00	USD
		Standard - USA WWith	1,700.00	USD		1 EA	8,500.00	USD

Sales and Distribution in ERP

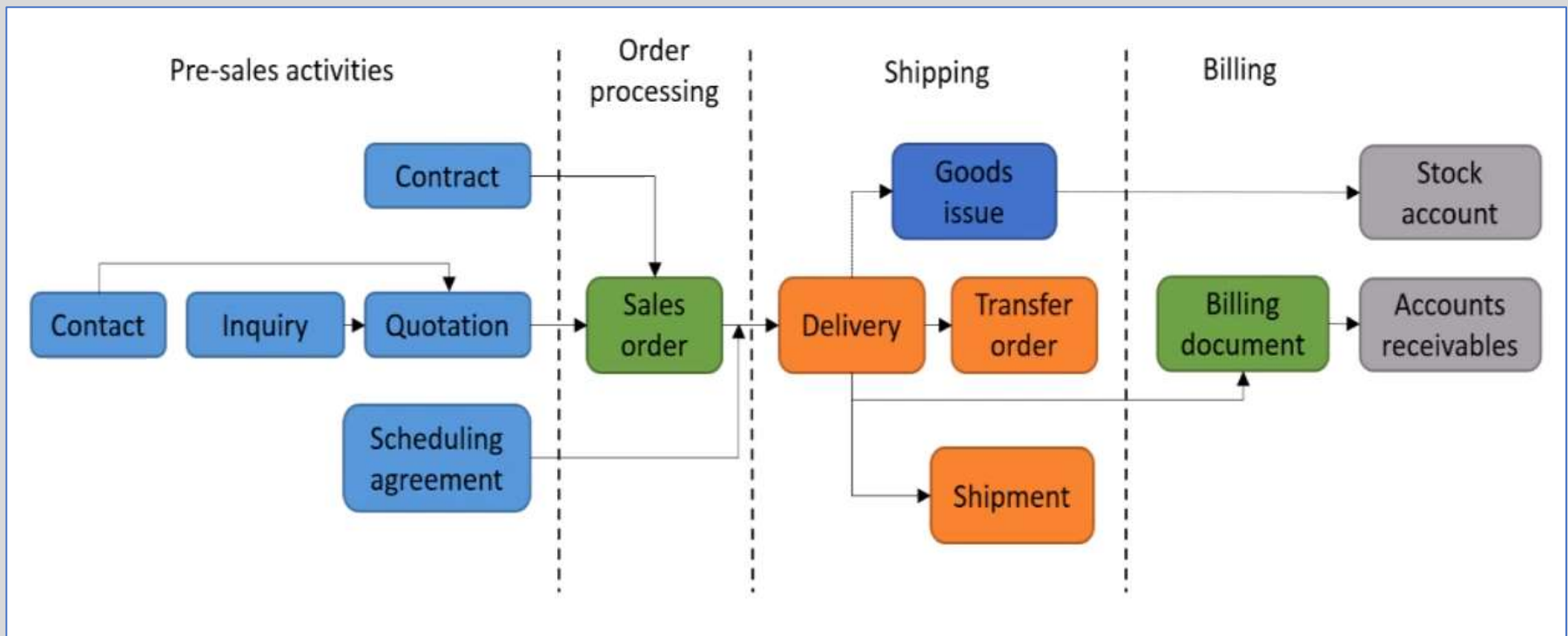
SAP ERP Sales and Distribution module treats the sales order process as a cycle of events:

- Pre-sales activities
- Sales order processing
- Inventory sourcing
- Shipping (Delivery)
- Billing
- Payment



YouTube Video: <https://youtu.be/kP-X4KDAgQc>

SAP Order-to-Cash Process

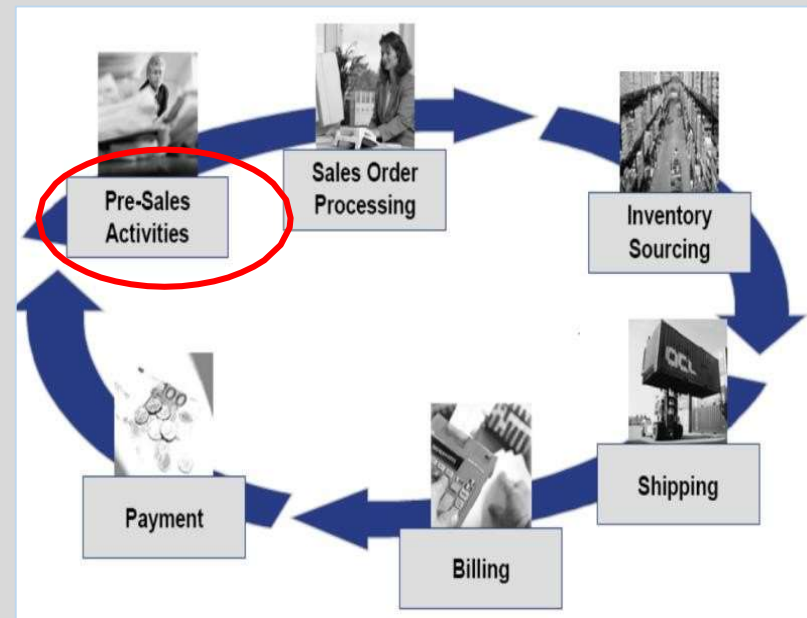


<https://youtu.be/msjRb3BYdf8>

Pre-Sales Activities

Sales Support is a component of SD that assists in the sales, distribution, and marketing of a companies products and services to its customers. It contains the following functionality:

- Creating and tracking customer contacts and communications (sales activity)
 - Phone call records
 - On-site meeting
 - Letters
 - Campaign communication
- Implementing and tracking direct mailing, internet, and trade fair campaigns based on customer attributes.



Inquiry

- An inquiry is a customer's request to a company for information or quotation in respect to their products or services without obligation to purchase.
 - How much will it cost
 - Material/Service availability
 - May contain specific quantities and dates
- The inquiry is maintained in the system and a quotation is created to address questions for the potential customer.

Company		Inquiry				
The Bike Zone 2105 N Lewis Ave Portland OR 97227		Number/Date 10000002 / 04/21/2010 Reference no./Date 000 / 04/21/2010 Delivery date Day 04/21/2010 Cust. no. 1301 Validity period 04/21/2010 bis 05/21/2010				
We deliver according to the following conditions:		Currency USD				
Terms of payment Payable immediately without deduction						
Terms of delivery FOB San Diego						
Weights (gross/net) - Volume - Mark						
Gross weight		57,170 G	Net weight 57,170 G			
Please see our promotional offer enclosed. Delivery as long as stocks last.						
Item	Material	Qty	Description	Price	Price unit	Value
000010	DXTR1000	5 EA	Deluxe Touring Bike (black)	3,000.00	USD	15,000.00
000020	PRTR1000	2 EA	Professional Touring Bike (black)	3,200.00	USD	6,400.00
Final amount						21,400.00

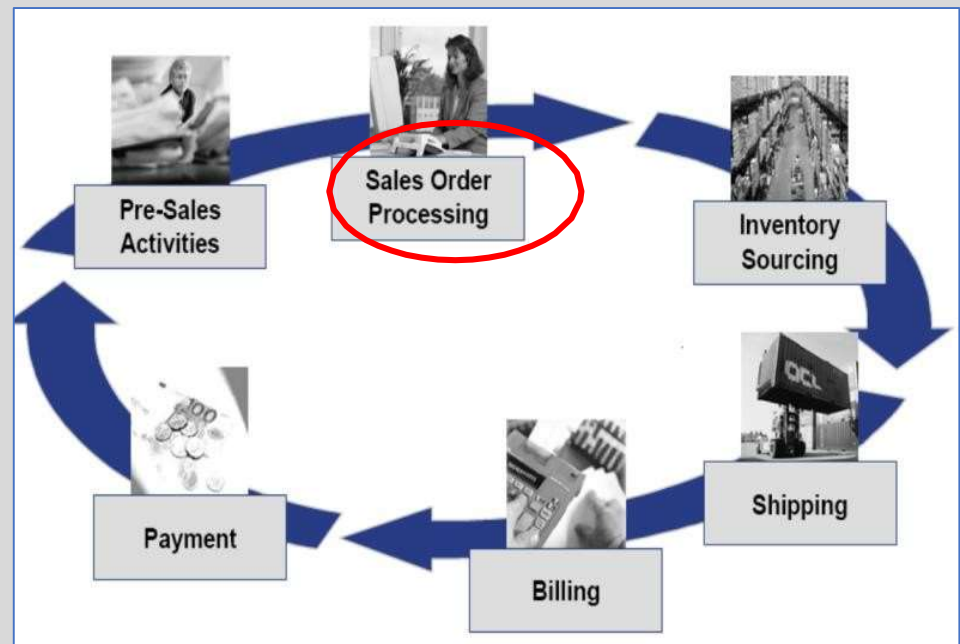
Quotation

The quotation presents the customer with a legally binding offer to deliver specific products or a selection of a certain amount of products in a specified timeframe at a pre-defined price.

Company		Quotation				
The Bike Zone 2105 N Lewis Ave Portland OR 97227		Number/Date 20000000 / 04/21/2010 Reference no./Date 000 /04/21/2010 Delivery date Day 04/21/2010 Cust. no. 1301 Validity period 04/21/2010 bis 05/21/2010				
We deliver according to the following conditions:		Currency USD				
Terms of payment Payable immediately without deduction						
Terms of delivery FOB San Diego						
Weights (gross/net) - Volume - Mark						
Gross weight	57,170 G Net weight	57,170 G				
Please see our promotional offer enclosed. Delivery as long as stocks last.						
Item	Material	Qty	Description	Price	Price unit	Value
000010	DXTR1000	5 EA	Deluxe Touring Bike (black)	3,000.00	USD	15,000.00
	Material			50.00-	USD	250.00-
	% Discount from N			5.000-	%	737.50-
	Net Value for It			2,802.50	USD	14,012.50
000020	PRTR1000	2 EA	Professional Touring Bike (black)	3,200.00	USD	6,400.00
	% Discount from N			5.000-	%	320.00-
	Net Value for It			3,040.00	USD	6,080.00
Final amount						20,092.50

Sales Order Processing

- Sales order processing: series of activities that must take place to record a sales order.
- Sales order can start from a quotation or inquiry generated in the pre-sales step or just a call-in from customers.
- Information collected from the customer to support the quotation is immediately included in sales order.
- Critical steps in sales order processing:
 - Recording the items to be purchased
 - Determining the selling price
 - Recording the order quantities



Sales Order

The sales document is made up of three primary areas:

– Header

Data relevant for the entire sales order: Ex: customer data, total cost of the order

– Line Item(s)

Information about the specific product: Ex: material and quantity, cost of an individual line

– Schedule Line(s)

Uniquely belongs to a Line Item, contains delivery quantities and dates for partial deliveries

Standard Order	15	Net value	20,092.50	USD
Sold-To Party	1301	The Bike Zone / 2105 N Lewis Ave / Portland OR 97227		
Ship-To Party	1301	The Bike Zone / 2105 N Lewis Ave / Portland OR 97227		
PO Number	000	PO date	04/21/2010	

Sales	Item overview	Item detail	Ordering party	Procurement	Shipping	Reason for rejection
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Req. deliv. date	D	05/21/2010	Deliver. Plant	
<input type="checkbox"/> Complete delv.			Total Weight	57,170.6
Delivery block			Volume	0.000
Billing block			Pricing date	04/21/2010
Payment card			Exp. date	
Card Verif. Code				
Payment terms	0001	Pay immediately w/o Incoterms	FOB	San Diego
Order reason				

All items						
Item	Material	Order Quantity	Un	S	Description	Customer Material
10	DXTR1000		5	EA	<input type="checkbox"/> Deluxe Touring Bike (black)	
20	PRTR1000		2	EA	<input type="checkbox"/> Professional Touring Bike (black)	

Sales Document Item	10	Item category	TAN	Standard Item
Material	DXTR1000	Deluxe Touring Bike (black)		

Sales A	Sales B	Shipping	Billing Document	Conditions	Account assignment	Schedule lines	Pa
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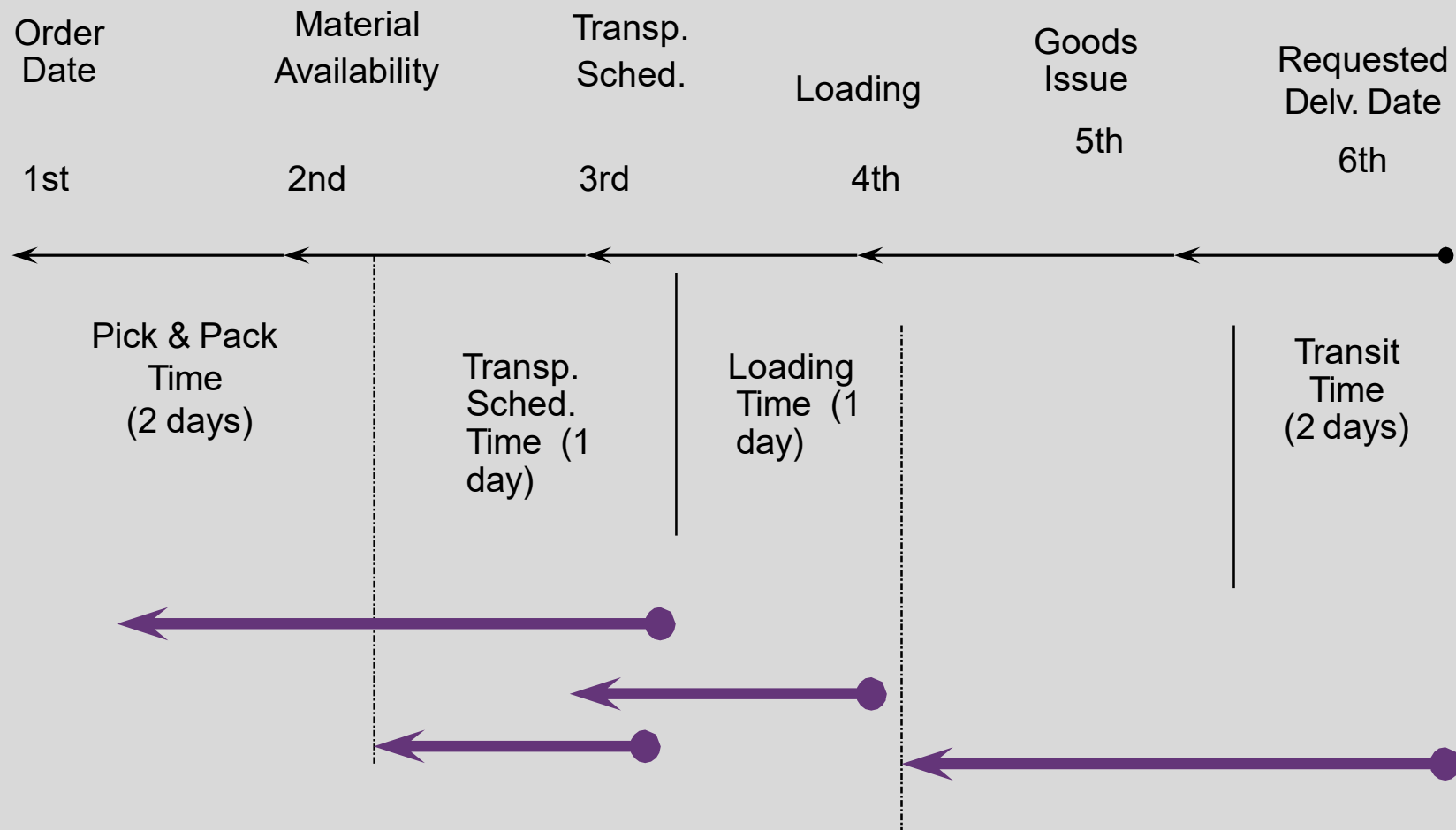
<input type="checkbox"/> Fixed date and qty	Order Quantity	5	EA
Delivery time	Delivered qty	5	

Quantities/Dates					
P. Delivery Date	Order quantity	Rounded qty	Confirmed Qty	Sa... Delivery block	Delivered qty
D 04/21/2010	5	5	5	EA	5

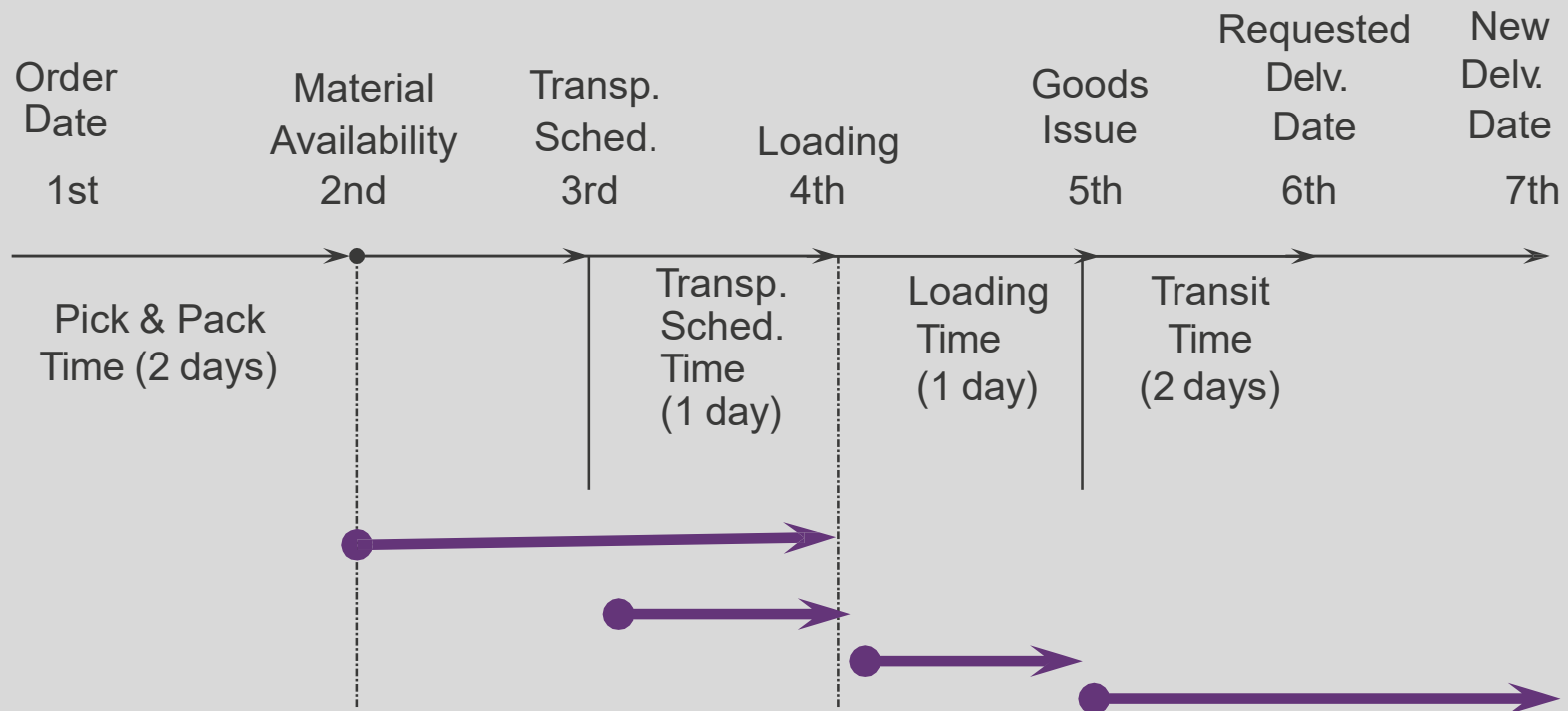
Delivery Scheduling

- When an order is created you must enter a requested delivery date for the order or each line item.
- The system will then determine a delivery timeline, this will be used when determining our material availability, or ATP (Availability to Promise) date.
- The system will determine this date using forward and backward scheduling rules you have defined.

Backward Scheduling



Forward Scheduling

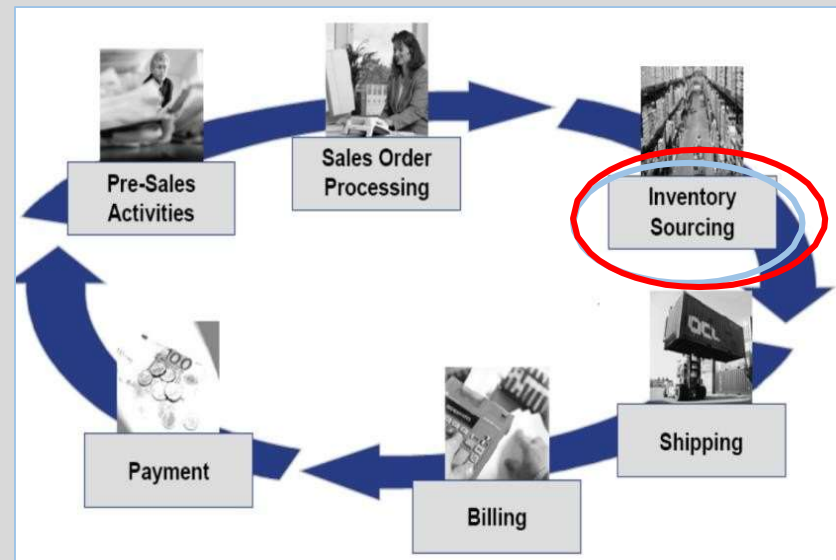


Shipping & Route Determination

- During the creation of the sales order the system must determine the shipping point from which the material will be shipped and the route the material will take to get from your warehouse to your customers location.
- A shipping point is determined for each line item within the order.
- The route determination is used to define the transit time of the material that we used in scheduling.

Inventory Sourcing

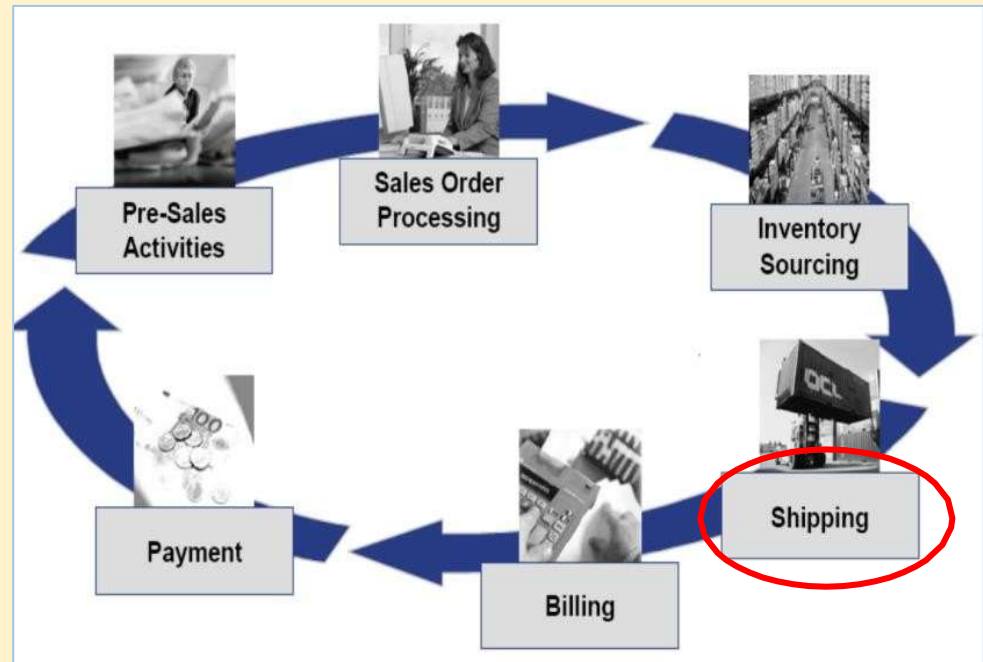
- Available-to-Promise (ATP) check
 - SAP ERP system checks company's inventory records and production planning records to see whether:
 - Requested material is available
 - Requested material can be delivered on the date the customer desires
 - Includes expected shipping time
- System can recommend an increase in planned production if a shortfall is expected



Delivery (Shipping)

- The shipping process begins when the delivery document for the sales order is created. This document controls, supports, and monitors numerous sub-processes for shipping processing:

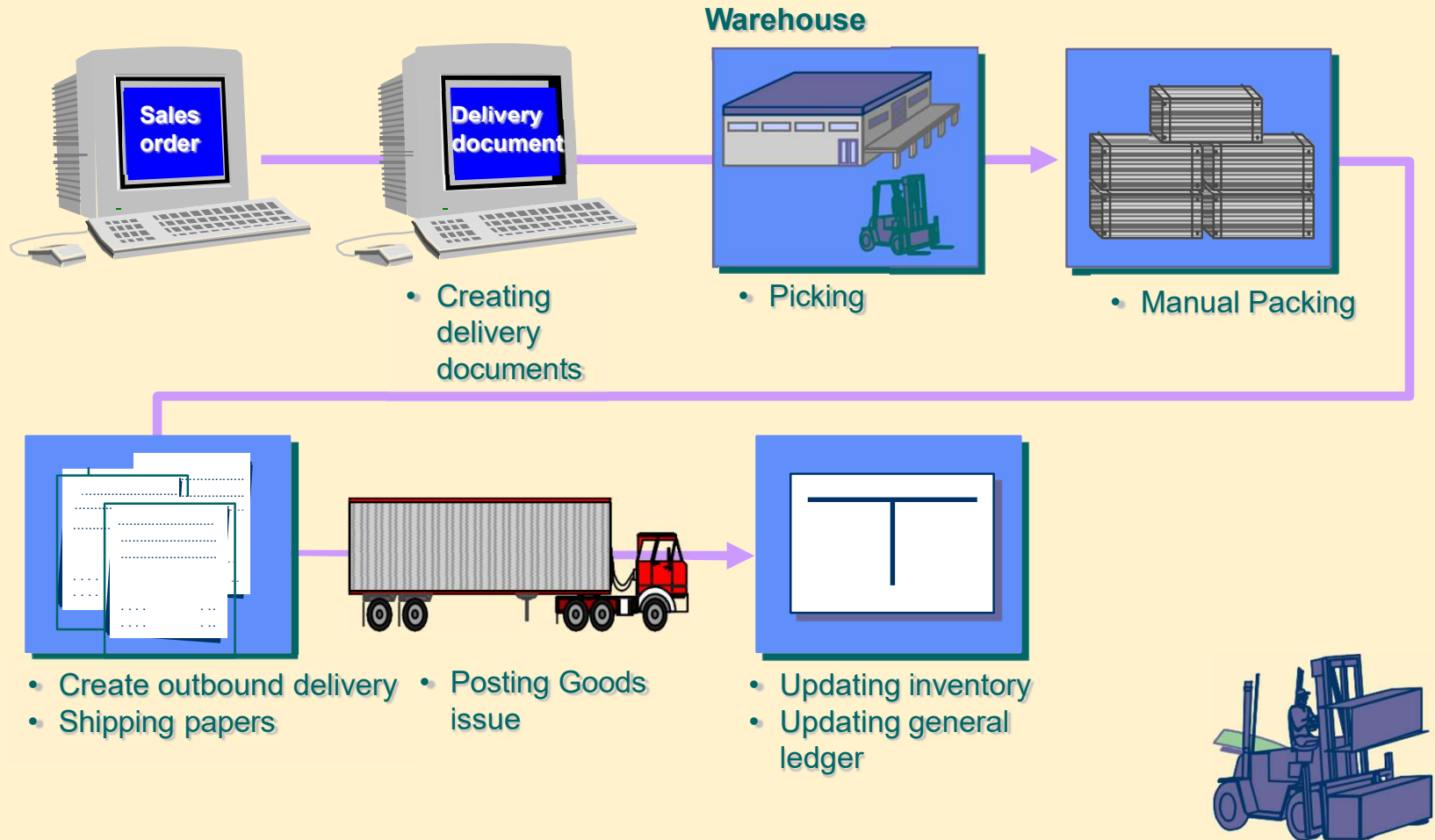
- Picking
- Packing
- Post Goods Issue



- Integrate with the Material Management (MM) and Finance (FI) modules
- Delivery process allows deliveries to be created so that the warehouse and shipping activities are carried out efficiently

Sales & Distribution – Shipping

Shipping process begins when an outbound delivery document (transaction) is created



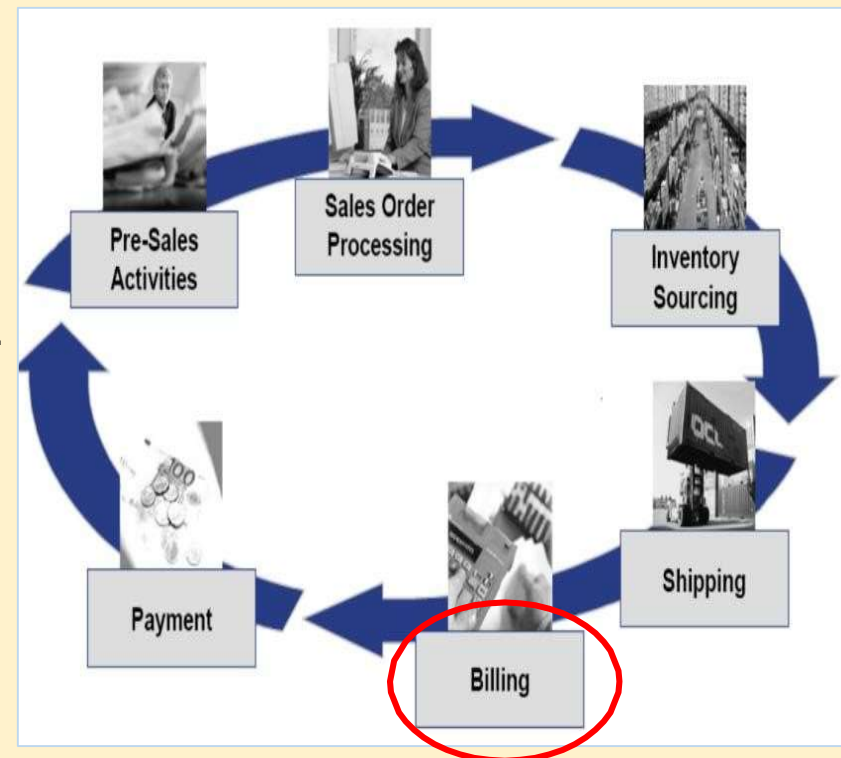
Goods Issue

- Event that indicates the legal change in ownership of the products
- Reduces inventory and enters Cost of Goods Sold
- Automatically updates the General Ledger (G/L) accounts
- Ends the shipping process and updates the status of the shipping documents

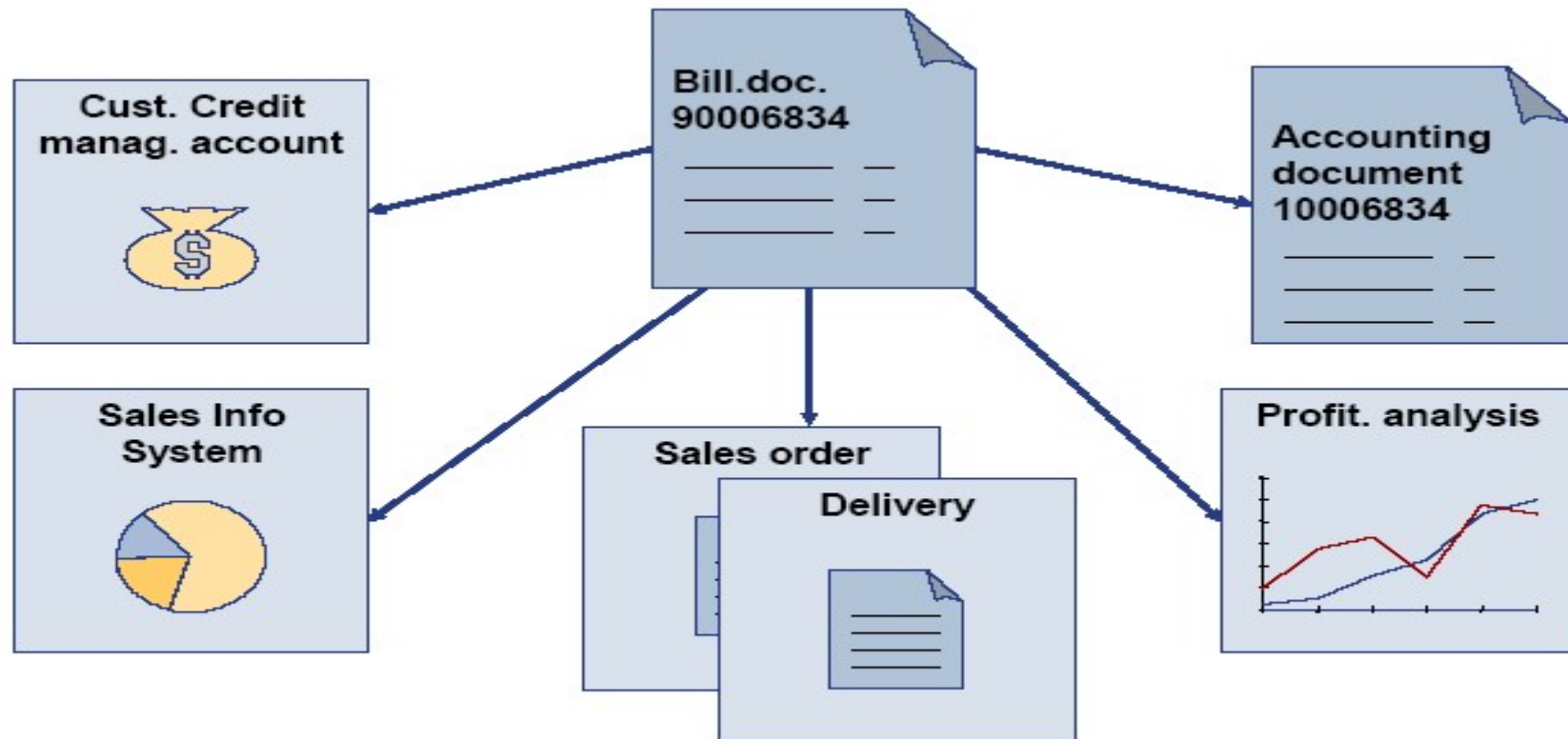
Billing

- The billing document is created by copying data from:
 - The sales order (Order-based billing), and/or
 - The delivery document (Delivery-based billing)

- The billing process is used to generate customer invoice which can be mailed, faxed, or transmitted electronically to the customer
- It will update the customer's credit status.
- The billing document will automatically create a debit posting to your customer sub-ledger account and credit your revenue account.
- At this point that the sales process is passed over to Financial Accounting to await payment.



Effects of a Billing Document

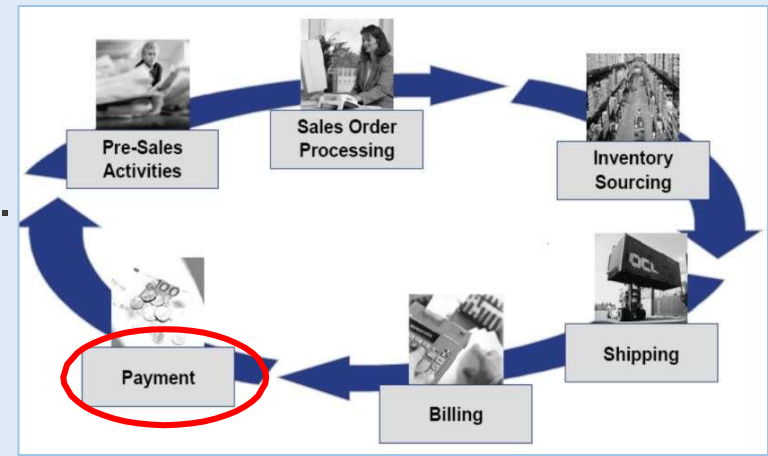


When you save the billing document, the system automatically generates all the required documents for accounting.

In accounting, the system carries out a debit posting on the customer receivables account and a credit posting on the revenue account.

Payment (Receipt)

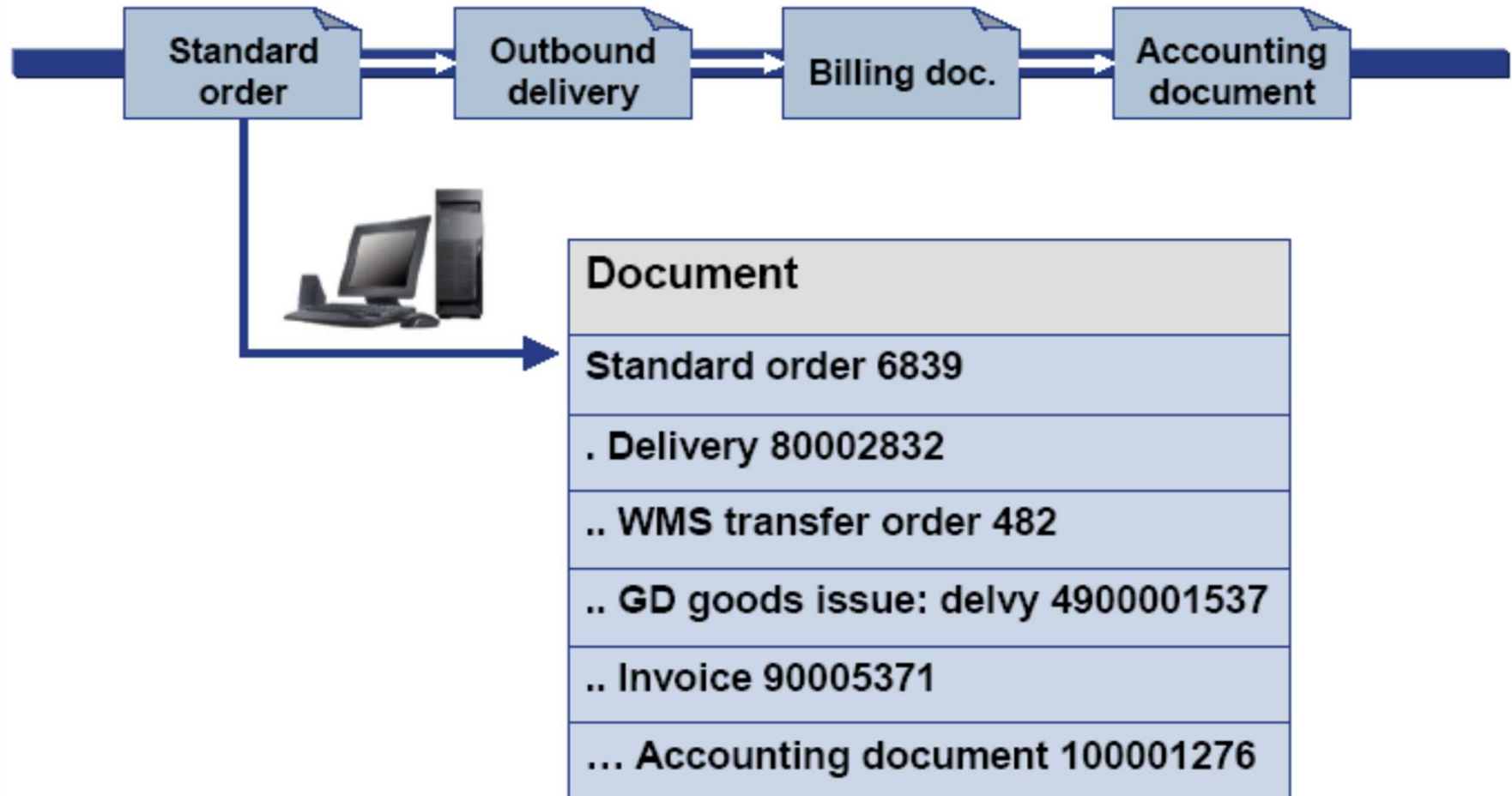
- Payment is the final step in the sales order process, this step is managed by the Financial Accounting department.
- Final payment includes:
 - Posting payments against invoices.
 - Reconciling differences between payment and invoice.
- Payment will create a posting clearing the liability in the A/R account and increases your bank account.
 - Debits cash (Bank Account) and credits (reduces) customer's account (Accounts Receivable)
- Timely recording of this transaction has an effect on the timeliness and accuracy of any subsequent credit checks for the customer
















Document Flow

- When a sales order is saved, SAP ERP system assigns a document number to the sales order transaction.
- SAP ERP system keeps track of the document numbers for the Sales Order.
- Employees can track status of an order while it is in process or research it after shipping.
- **Document flow** in SAP ERP: linked set of document numbers related to an order.
- The document flow and order status feature allows you to find the status of an order at any point in time. SAP updates the order status every time a change is made to any document created in the customer order management cycle (Order-to-Cash).

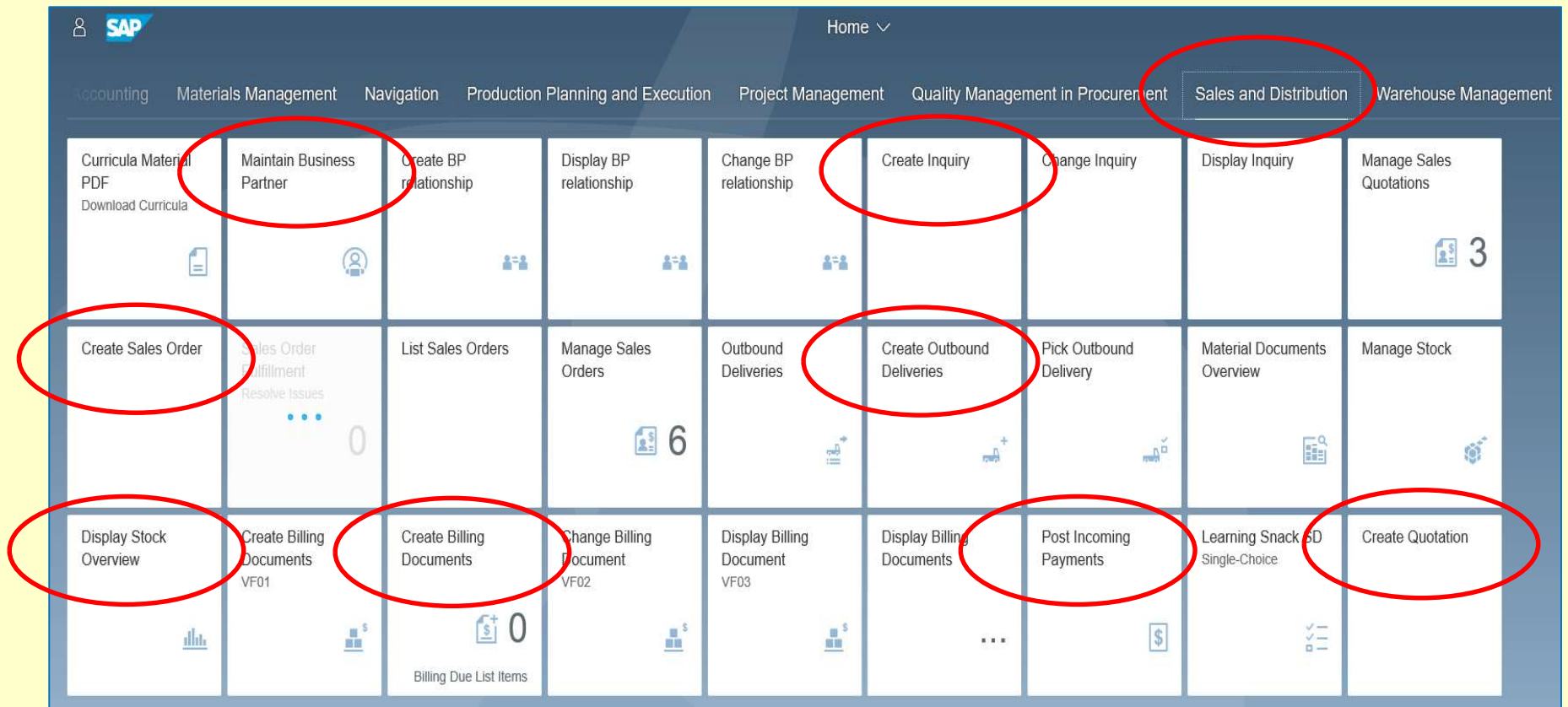
Document flow in SAP



Document Flow in SAP

Document Flow						
  Status overview  Display document Service documents 						
Business partner 0000001301 The Bike Zone Material DXTR1000 Deluxe Touring Bike (black)						
   						
Document	Quantity	Unit	Ref. value	Currency	On	Status
▼ Inquiry 0010000002 / 10	5	EA	15,000.00	USD	04/21/2010	Completed
▼ Quotation 0020000000 / 10	5	EA	14,012.50	USD	04/21/2010	Completed
▼  Standard Order 00000000015 / 10	5	EA	14,012.50	USD	04/21/2010	Completed
▼ Outbound Delivery 0080000001 / 10	5	EA			04/21/2010	Completed
•  Picking request 20100421 / 10	5	EA			04/21/2010	Completed
•  GD goods issue:delvy 49000000011 / 1	5	EA	7,000.00	USD	04/21/2010	complete
▼  Invoice 0090000001 / 10	5	EA	14,012.50	USD	04/21/2010	Completed
•  Accounting document 00900000002	5	EA			04/21/2010	Cleared

S & D in SAP S/4 HANA



S & D Group

S & D in SAP S/4 HANA

The screenshot displays the SAP S/4 HANA interface for creating a new organization role for an FI Customer. The title bar at the top reads "Create Organization: Role FI Customer". Below the title bar, a navigation bar contains various tabs: "Locator On/Off", "Person", "Organization", "Group", "With Reference", "Open BP", "Switch Between Display and Change", "Check", "Company Code", "ETM Data", "Relationships", "Settings", and "More". The main content area is divided into several sections. On the left, there is a "Find" section with a "Business Partner" field set to "25007" and a "Start" button. Below this is a "Partner" table with columns for "Partner" and "Description". The main area contains a "Business Partner" field, a "Create in BP role" dropdown set to "FI Customer (New)", and a "Grouping" dropdown set to "Internal number assignment". Below these fields are tabs for "Address", "Address Overview", "Identification", "Control", "Payment Transactions", "Status", "Legal Data", "Customer: General Data", and "Customer: Tax Data". The "Address" tab is currently selected, showing fields for "Title", "Name", "Salutation", and "Search Terms". The "Search Terms" section has a "Search Term 1/2" field.

Business Partner: Grouping: Internal number assignment

Create in BP role: FI Customer (New)

Find: Organizations By: Number BusinessPartner: 25007 Start

Partner Description

Name


Title: Name: Salutation: Salutation:

Search Terms

Search Term 1/2:


Create Customer Master

S & D in SAP S/4 HANA



 Create Inquiry: Overview

Display Propose Items Header Output Preview Reject Document Loading Units and Aggregation Categories More ▾

Inquiry: Net Value:

Sold-To Party: 























































Ship-To Party:

Cust. Reference: Cust. Ref. Date:  


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

Valid From: Valid To:

Req. Deliv.Date: Expect.Ord.Val.:



                                                     

S & D in SAP S/4 HANA



 Create Quotation: Overview

Display Propose Items Header Output Preview Reject Document Loading Units and Aggregation Categories More ▾

Quotation: Net Value:

Sold-To Party:  

















Ship-To Party:

Cust. Reference: Cust. Ref. Date:  

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

Valid From: Valid To:

Req. Deliv.Date: Expect.Ord.Val.:

               Group 

All Items

<input type="checkbox"/>	Item	Material	Req. Segment	Order Quantity	SU	Altltm	Item Description
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							

Create a Quotation

S & D in SAP S/4 HANA

Create Standard Order: Overview

▼

Display

Propose Items

Header Output Preview

Reject Document

Loading Units and Aggregation Categories

More ▼

Standard Order:

Net Value:

Sold-To Party:

Ship-To Party:

Cust. Reference:

Cust. Ref. Date:

Sales

Item Overview

Item detail

Ordering party

Procurement

Shipping

Reason for rejection

Req. Deliv.Date:*

Deliver.Plant:

Complete Div.: ☐

Total Weight:

Delivery Block:

Volume:

Billing Block:

Pricing Date:

Pyt Terms:

Inco. Version:

Incoterms:

Inco. Location1:






Group


All Items






<input type="checkbox"/>	Item	Material	Req. Segment	Order Quantity	Un	S	Item Description	Customer Material Numb	ItCa	HL Itm	D.. First Date
<input type="checkbox"/>						<input type="checkbox"/>					D 08.04.2020
<input type="checkbox"/>						<input type="checkbox"/>					D 08.04.2020
<input type="checkbox"/>						<input type="checkbox"/>					D 08.04.2020

Create a Sales Order

S & D in SAP S/4 HANA

    Create Outbound Deliveries 

Standard 

Ship-To Party:  Shipping Point:  Planned Creation Date: Today and Tomorrow  Priority:  SD Document: 

Sales Documents Due for Delivery (0)

<input type="checkbox"/>	Planned Creation Date	Planned GI Date	Priority	SD Document	Shipping Point Name	Ship-To Party Name
No data						

Start the Shipping Process


S & D in SAP S/4 HANA

The screenshot shows the SAP S/4 HANA 'Create Billing Document' interface. At the top, there is a navigation bar with the SAP logo and the title 'Create Billing Document'. Below this is a toolbar with buttons: 'Change', 'Display', 'Billing Due List', 'Billing Documents Overview', 'Selection Date', 'Selection List', 'More Documents', and 'More'. The main area is divided into two sections. The first section, 'Default Data', contains four input fields: 'Billing Type' (a dropdown menu), 'Serv. Rendered' (a date field), 'Billing Date' (a date field), and 'Pricing Date' (a date field). The second section, 'Docs to Be Processed', contains a table with the following columns: 'Document', 'Item', 'SD Document Category', 'Processing Status', 'Billi...', and 'Cancelld Bill...'. The table is currently empty.

Document	Item	SD Document Category	Processing Status	Billi...	Cancelld Bill...
----------	------	----------------------	-------------------	----------	------------------

Create the Customer Invoice

S & D in SAP S/4 HANA

 Post Incoming Payments Q

Balance: 0,00 USD

Payment

General Information

*Company Code:

*Posting Date:

*Journal Entry Date:

Value Date:

Reference:

Period:

*Journal Entry Type:

Bank Data

*G/L Account:

House Bank/Account ID:

*Amount: USD

Fees:

Assignment:

Exchange Rate:

Amount/CCode Currency: USD

Open Item Selection

Account Type/Account ID:

Payment Reference:

[Propose Items](#)

Proposed Items Post to G/L Account Post on Account Attachments (0) Notes (0)

Open Items (0)

[Select More](#) [Clear All](#)

Compa...	Account	Journal Entry	Journal...	Item Text	Journal Entry D...	Net Due Date	Amount (USD)	Assignment	Clear	Remove	Journal Entry	Open Amou...	Allocated A...	Discount Am...	Invoice Refer...

Items to Be Cleared (0) [Remove All](#)

Record the Customers Payment

S & D in SAP S/4 HANA

SAP Stock Overview: Basic List

Selection

Material: Mongoose Mountain Bike 001

Material Type: FERT Finished Product

Unit of Measure: Base Unit of Measure: EA

External Manufacturer:

Stock Overview

Full

Client/Company Code/Plant/Storage Location/Batch/Special Stock	Unrestricted use	Qual. inspection	Reserved	Rcpt reservation	On-Order Stock	Consgrt ordered	Stck trans.(plnt)	Transfer (SLoc)
Full	10,000							
US00 Global Bike Inc.	10,000							
DL00 Plant Dallas	10,000							
FG00 Finished Goods	10,000							

Review the Stock Levels

Customer Relationship Management

- Companies without a good connection between their workers and their customers run the risk of losing business.
- **Customer relationship management (CRM) software** can help companies streamline their interactions with customers.



What is CRM: <https://youtu.be/Hh4HnpxyEGE>

Core CRM Activities

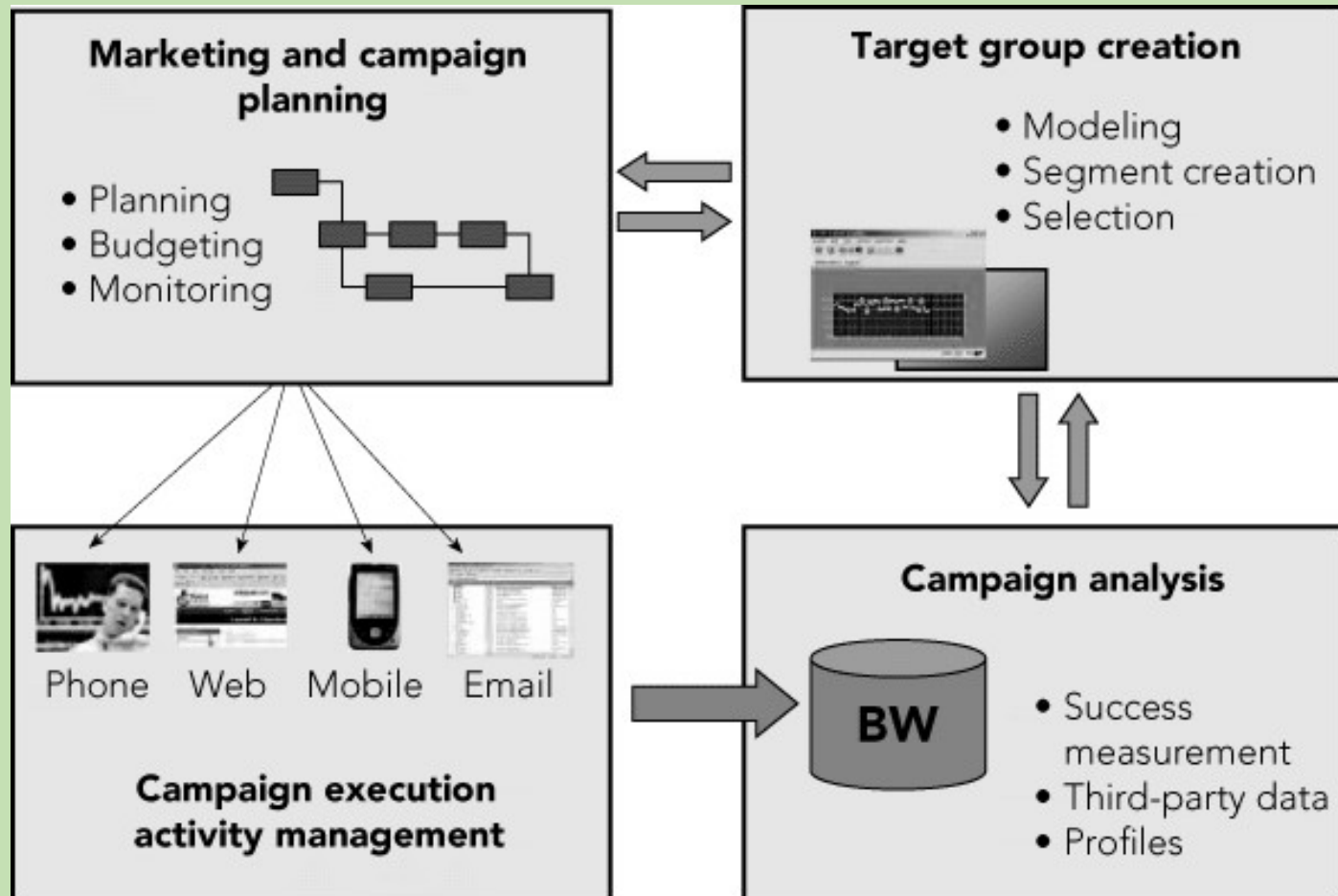


SAP's CRM Software

- SAP ERP system processes business transactions and provides much of the raw data for CRM
- SAP's Business Warehouse: system for reporting and analysis of transactional data
- Advanced Planner and Optimizer (APO): system that supports efficient planning of the supply chain
- SAP's view of CRM is to provide a set of tools to manage the three basic task areas, or jobs:
 - Marketing, Sales, and Service



SAP's CRM Software



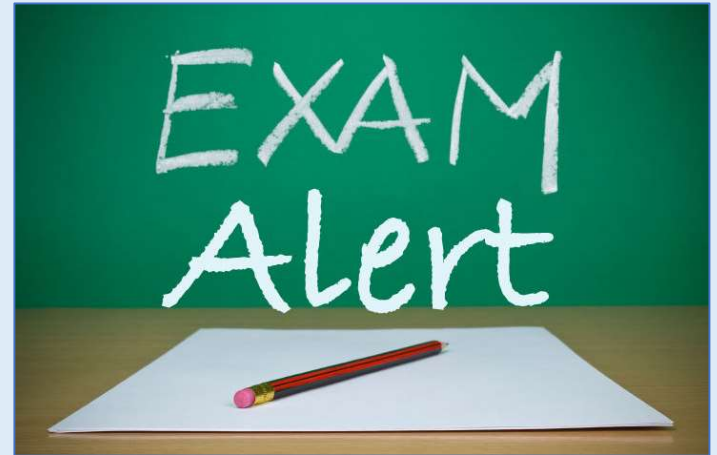
The Benefits of CRM

- Improved customer engagement
- Lower costs
- Higher revenue
- Improved strategy and performance measurement
- Data analytics & reporting.



Sample Exam Questions

- A. What Master Data items would be required in order to enter a Sales Order transaction ?
- B. What are the six processing steps that are involved in the Sales Order cycle ?
- C. Explain the difference between a *Sales Inquiry* and a *Sales Quotation*.
- D. What is the purpose of the *Document Flow* transaction in SAP ?
- E. List three benefits of CRM
- F. What are the three basic task areas managed by a CRM system ?

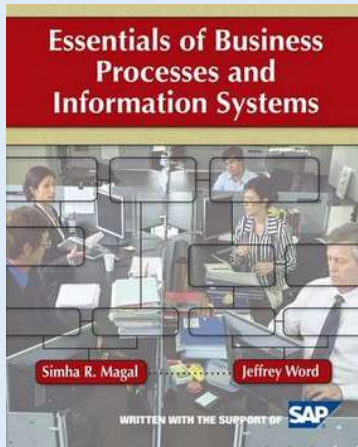


References



Monk & Wagner

Chap 3



Magal & Word

Chaps 5