

Quality Management in Procurement (QM) Case Study

This case study explains how quality management can be integrated in a sales and distribution process during procurement and thus fosters a thorough understanding of each process step and underlying SAP functionality.

Product

SAP S/4HANA 1709
Global Bike

Level

Beginner

Focus

Quality Management

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3.2

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MOTIVATION

The purpose of this assignment is that you become familiar with the quality management in sales and Distribution

PREREQUISITES

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

You should have completed the Navigation exercise and have read the GBI Story prior to starting this assignment.

NOTES

This case study uses the Global Bike data set, which has exclusively been created for SAP UA global curricula.

This material was prepared with the assistance of the BSIS 420/620 students at CSU Chico.

Process Overview

Learning Objective Understand and perform a Quality Management Process integrated in an Order-To-Cash Process.

Time 160 min

Scenario While receiving Material, you need to check the quality in order to sell high value goods. You will take on different roles within the Global Bike Inc. to perform a quality inspection on newly arrived goods and complete a Sales and Distribution process with them. You work for example, as a warehouse worker, accounting clerk and sales agent. You will get insight in the Sales and Distribution (SD), the Materials Management (MM), the Financial Accounting (FI and CO) and the Warehouse Management (WM) departments.

Employees involved

- Catherine Dubios (West Rep. San Diego)
- Ricardo Robles (Warehouse Supervisor Dallas)
- Sanjay Datar (Warehouse Employee Dallas)
- Juriko Hamada (Shipping Clerk Dallas)
- Yoshi Agawa (Receiving Clerk San Diego)
- Sunil Gupta (Warehouse Employee San Diego)
- Karl Gruber (Salesperson 2 San Diego)
- Zarah Morello (Shipping Clerk San Diego)
- Stephanie Bernard (Billing Clerk)

You start the process by creating a new customer (Quality Bikes). They will order Bikes from Global Bike. Beforehand, some goods are transferred from Dallas to San Diego. Before leaving the warehouse in Dallas, a quality inspection is performed. Afterwards they are moved to San Diego from where they are sold and sent to your customer.

The graphic below displays the complete process (20 tasks).

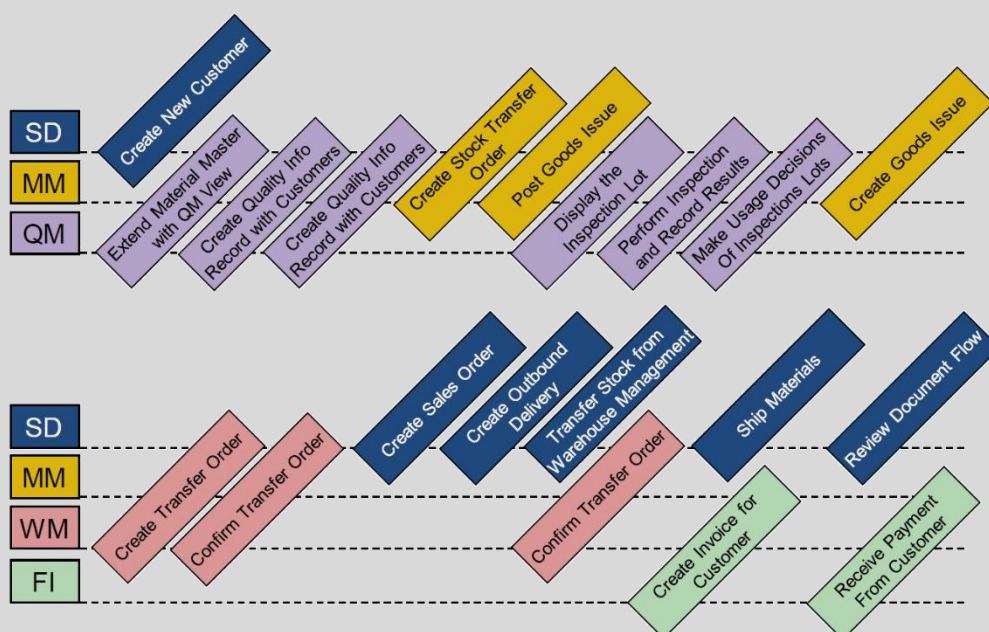


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Step 1: Create New Customer

Task Create a new customer.

Time 10 min

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

Name (Position) Catherine Dubios (West Rep. San Diego)

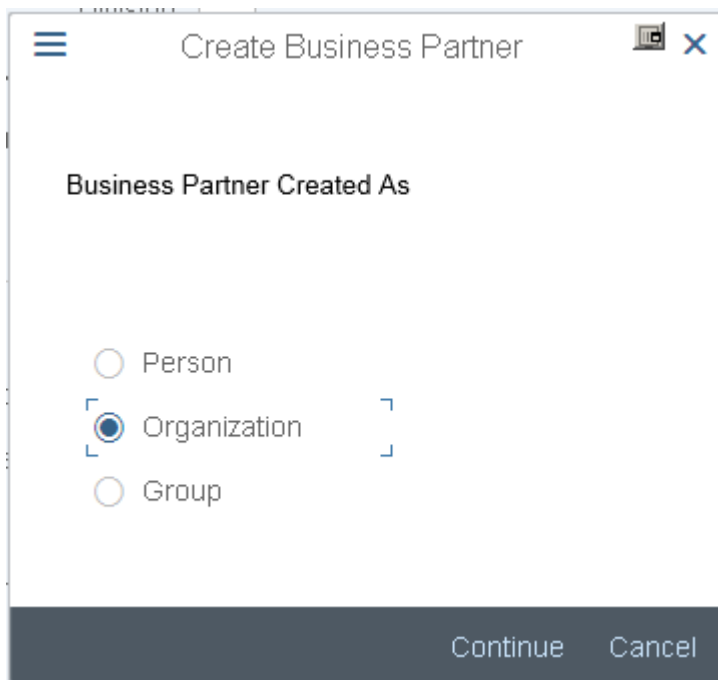
In this case study, we will create the master data for a new customer. Two types of customer data are stored about a customer – sales data and accounting data. The customer master data is created in three groups, or views – general, accounting, and sales. Customers can be created centrally, meaning that 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:

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

Menu path

This will produce the following screen.



Select **Organization** for Business Partner.

Organization

Address

Address Overview

Identification

Control

Payment Transactions

Status

Legal Data

Name

Title: 0003 Company

* Name: Quality Bikes

Salutation:

Salutation:

Search Terms

* Search Term 1/2: 000

Standard Address

Print Preview

Building Code:

Room:

Floor:

c/o:

Street 2:

Street 3:

Street/House number: Lusk Blvd. 25

Street 4:

Street 5:

District:

Different City:

* Postal Code/City: 92121 San Diego

* Country: US USA

Region: CA California


Time zone: PST


Tax Juris.: CA00000000

Transportation Zone: 0000000002

Structure Group:

Undeliverable:

Select **Company** as Title, enter **Quality Bikes** for Name and **###** for Search term 1. Remember to replace **###** with your three-digit number, e.g. 003 if your number is 003. Then, enter **Lusk Blvd. 25** for Street, **92121** for Postal Code, **San Diego** for City, **US** for Country, and **CA** for Region. Enter **English** as Language. Then click on the expand icon  to access additional street address fields.

Enter **PST** for Time zone. Scroll down and click on the search icon  next to the Transportation Zone field or click into the field Transportation Zone and press the F4 key. This will produce the following pop-up window.

Company
Quality Bikes

Lusk Blvd. 25
San Diego, 92121, CA
US
English

PST

☰ Transportation zone to or from which the goods are delivered ... ✕

Restrictions

Country Key: US

✓✕📄🔍🔍+★🔗🖨️⌵🔗

TranspZone	Description
0000000001	Region East
0000000002	Region West

Double-click on **Region West** to select it. Further enter **CA0000000** as Tax Juris. Code.

Region West
CA0000000

Choose the *Customer: Unloading Points* tab. Enter **Dock 1** as Unloading Point and choose **US** as Calendar.

Dock 1
US

Proceeding with a click on *Company Code* and confirming the two potential information pop-up windows will produce the following screen.

Customer: Account Management Customer: Payment Transactions Customer: Correspondence Customer: Insurance

Account Management

Reconciliation acct:

Head office:

Sort key:

Subsidy Indicator:

Authorization Group:

Planning Group:

Release Group:

Value Adjustment:

Interest Calculation

Interest indicator:

Interest Cycle: Months

If you are asked to enter a Company Code, search for **US00**. If Company Code is not entered, use search to enter US00. Hit Enter.

US00

Enter **110000** for Recon. account (reconciliation account), **002** for Sort key and **E3** (foreign customers) for Planning Group. Then click on the *Customer: Payment Transactions* tab.

110000
002
E3

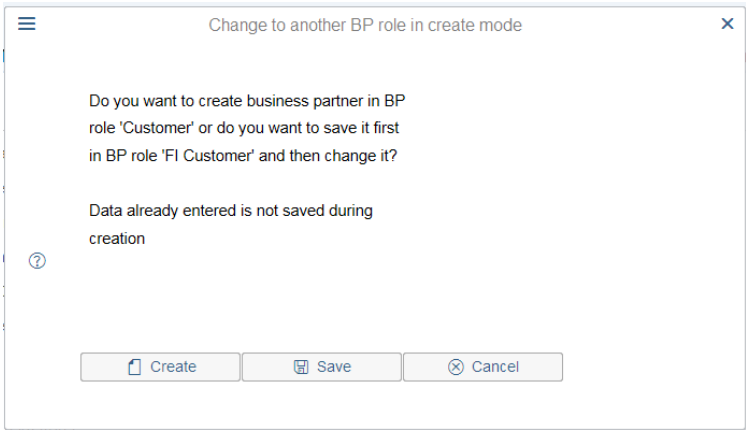
Select the box for Record Payment History. After entering **0001** for Terms of payment. Confirm with Enter.

Record payment history
0001

In the Create in BP role drop down, select Customer In the pop-up screen click on

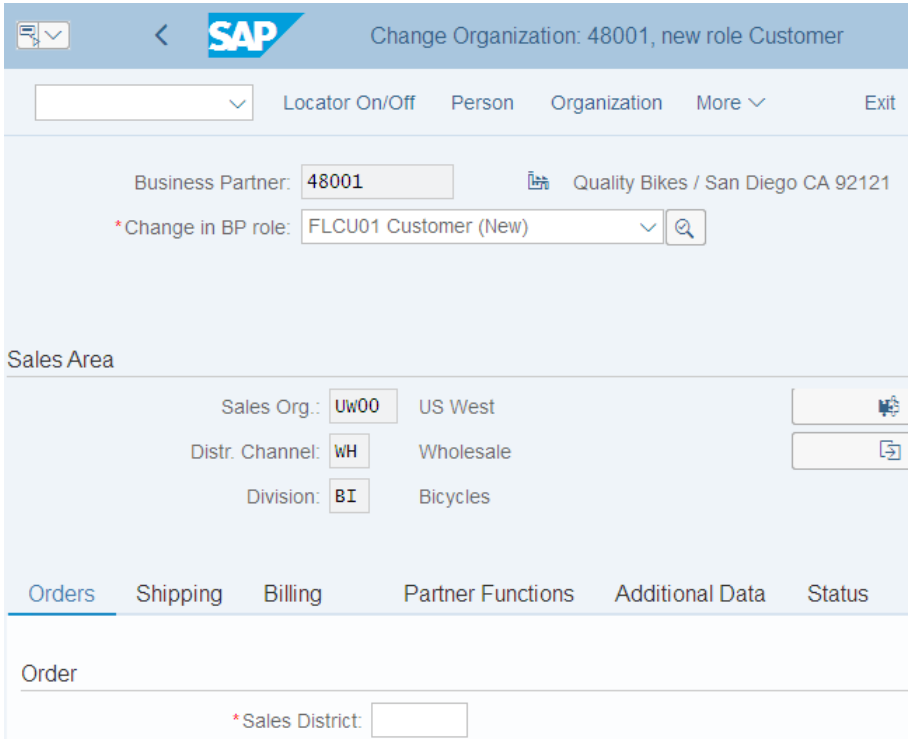
📄 Save

.



Click on **Sales and Distribution** and enter **UW00** for Sales Org., **WH** for Distr. Channel and **BI** for Division. Confirm with Enter.

UW00
WH
BI



Make sure **USD** is entered for Currency and **1** is entered for Cust.pric.proc. Enter **1** for Cust.Stats.Grp. The Order probab. should be **100%**. Also required: Price Group **01** and Sales District **US002**. Finally click on the *Shipping* tab. Fill in the following data.

USD
1
1
100%
01
US002

Sales Area

Sales Org.:Uw00US West

Distr. Channel:WHWholesale

Division:BI Bicycles

Orders

Shipping

Billing

Partner Functions

Additional Data

Shipping

Delivery Priority:02

Order Combination:☐

Delivering Plant:SD00

Shipping Conditions:01

POD-Relevant:☐

POD Timeframe:

Partial Deliveries

Complete Delivery:☐


Max.Part.Deliveries:9

Part.dlv./item:☐

Unlimited Tolerance:☐

As shown above, enter **02** (normal) for Delivery Priority, **01** (standard) for Shipping Conditions, **SD00** for Delivering Plant, and **9** for Max. partial deliveries. Then click on the *Billing* tab.

02
01
SD00
9

Enter **FOB** (Free on Board) for Incoterms and **San Diego** for Incoterms Location 1, **0001** for Payment Terms, **01** for Acct Assmt Grp Cust. and **0** for Tax classification for all three categories. Then click on the save icon .

FOB San Diego
0001
01
0

The SAP system will create the master record for the new customer and assign the customer a unique customer number.

Customer number

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

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Step 2: Extend Material Master with QM View

Task Extend material master with QM view.

Time 15 min

Short Description Use the SAP Easy Access Menu to extend a material master record for a Bike to add data for the quality management view.

Name (Position) Ricardo Robles (Warehouse Supervisor Dallas)

To create a finished good material master record, follow the menu path:

Logistics ▶ Materials Management ▶ Material Master ▶ Material ▶ Create (Special) ▶ Finished Product

This will produce the following screen.

Menu path

< **SAP** Create Finished Product (Initial Screen)

Select View(s) Org. Levels Data More ▾

Material:

Industry Sector: ▾

Change Number:

Copy from...

Material:

In the Material field, type in **ORWN1###** (replace ### with your number) and select **Mechanical Engineering** as an Industry sector. Press Enter to proceed.

ORWN1###
Mechanical Engineering


On the next screen, select the following views by clicking on the square in front of the respective rows:

- *Quality Management*

Quality Management

Also, select **Create views selected**. Then, click on .

Create views selected

On the Organizational Levels screen, enter plant **DL00** (Dallas). Then, click on .

DL00

Organizational Levels

Organizational levels

Plant: DL00

☐ Org. levels/profiles only on request

✓ Select View(s)

Default Setting

✕

On the *Quality Management* Tab select Insp. Setup

Insp. setup

.

Warehouse Mgmt 2

Quality management

Accounting 1

Accounting 2

Costing 1

Costing 2

WM

Material: ORWN1000

i

* Descr.: Women's Off Road Bike

↺

📄

Plant: DL00

Plant Dallas

General data

Base Unit of Measure: EA each

Unit of issue:

QM material auth.:

☐ Inspection setup

Insp. setup

☐ Post to insp. stock

☐ Documentation reqd

GR processing time: days

Inspection interval: days

Catalog Profile:

In the *Plant DL00 Material ORWN1### : Inspection Setup Data* screen create a new Inspection Type by clicking on

Inspection Types

Plant DL00 Material ORWN1000 : Inspection Setup Data

InspTypes

S...	InspType	Short Text	PreferredInsTyp	Active	I...

Detailed information on inspection type

✓

🗑

📄 Inspection Types

✕

Enter Type **02** for InspType and mark it as active. Choose **Check** to check your entries and show detailed information on the inspection type.

02

In the detailed information uncheck **Automatic UD** and compare the screen with the screenshot below.

Automatic UD - unchecked

Detailed information on inspection type

Insp. with Mat Spec.: ☐

Insp. with task list: ☒

Automatic assignment: ☒

Check Chars: ☒

Smpl.procedure:

100% inspection: ☐

Inspection %:

Manual sample calc.: ☐

Manual sample entry: ☐

Dyn. mod. rule:

Skips allowed: ☒

Automatic UD: ☐

Serial numbers poss.: ☒

Avg. insp. duration:

Q-Score Procedure: 06 From usage decis... ▾

Allowed scrap share:

Individual QM order: ☐

QM Order:

Proceed with **✓**.

Then, click on **Save** to save your material.

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

Step 3: Create Quality Info Record with Customers

Task Create a quality info record with customers.

Time 5 min

Short Description In this task, you create a quality information record with the customer.

Name (Position) Ricardo Robles (Warehouse Supervisor Dallas)

To create a contact person, follow the menu path:

Logistics ▶ **Quality Management** ▶ **Quality Planning** ▶ **Logistics Master Data** ▶ **Quality Info. Record: SD** ▶ **Create**

Menu path

This will produce the following screen.


If your customer number is not entered by default, then search for your new customer using the F4 help with search term ###.


Enter **UW00** as Sales Organization and proceed with Enter.

Click on **New Info Record** **New Info Record** button on the application tool bar. This should produce the following screen:

Enter your Material **ORWN1###** and make sure that **Before delivery** is selected in the *Quality inspection* area.

Proceed with .

Then, click on  to save your Info record.

 Data for customer 25005 is saved

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

ORWN1###
Before delivery



Step 4: Create an Inspection Plan

Task Create an inspection plan.

Time 5 min

Short Description In this task, you create an inspection plan for the material you created.

Name (Position) Ricardo Robles (Warehouse Supervisor Dallas)

To change a customer master record, follow the menu path:

Logistics ▶ Quality Management ▶ Quality Planning ▶ Inspection Planning ▶ Inspection Plan ▶ Create

This will produce the following screen.

Menu path

The screenshot shows the SAP 'Create Inspection Plan: Initial Screen'. At the top, there is a navigation bar with a back arrow, the SAP logo, and the title 'Create Inspection Plan: Initial Screen'. Below the navigation bar is a tab bar with tabs for 'Header', 'Copy Model', 'Task Lists', 'Operations', and 'More'. The 'Header' tab is selected. The main area contains several input fields: 'Material:' with a long text box, 'Plant:' with a small text box, and 'Group:' with a small text box. Below these is a section titled 'Validity' containing 'Change Number:' with a text box, '*Key date:' with a date field showing '28.11.2017', and 'Revision level:' with a small text box. At the bottom is a section titled 'Additional data' containing 'Profile:' with a text box.

Enter your Material **ORWN1###** and the plant **DL00**. Set the Key date to the **current date**. Press Enter.

ORWN1###
DL00
current date

In the *Create Inspection Plan: Header Details* screen enter **6** as Usage and **4** as Status. Further Enter the Lot Size From **0**. Compare your entries with the following screen and proceed by choosing **Operations**.

6
4
0

SAP

Create Inspection Plan: Header Details

Previous Task List

Next Task List

Long Text

Task Lists

Material Assignment

Operations

More

Material: ORWN1000 Women's Off Road Bike

Task list

Group:

* Group Counter:

* Plant: Long text exists: ☐

General Data

Deletion Flag: ☐

* Usage:

* Status:

Planner Group:

Planning work center:

From Lot Size: To lot size: EA

Old task list no.:

On the *Inspection Plan Create: Operation Overview* Screen enter for Operation 10 the *Control Key* **QM01** and the *Description* **Quality Inspection**. Select the line for Operation 10 and choose **Inspection Characteristics**.

QM01
Quality Inspection

SAP

Inspection Plan Create: Operation Overview

Previous Task List

Next Task List

Header

Select All

Deselect All

Delete

More

Material: ORWN1000 Women's Off Road BI Grp.Count1

Sequence:

Operation Overview

<input type="checkbox"/>	Op...	SOp	Work cent...	Plant	Co...	Standard ...	Description	L...
<input checked="" type="checkbox"/>	0010			DL00	QM01		Quality Inspection	<input type="checkbox"/>
<input type="checkbox"/>	0020			DL00				<input type="checkbox"/>

On the *Create Inspection Plan: Characteristic Overview* fill in the following data for characteristic 10. Select the checkbox for *QL*. Enter **Pack** as *Master Insp. Char.* and enter **Packing OK** as *Short Text Char.*

QL - selected
Pack
Packing OK

Upon pressing Enter you should get the *Edit Characteristic Control Indicators* screen. If not, select the line with Char. 10 and click on **Control Indicators**.

Edit Characteristic Control Indicators

Ch 0010 Check Packing

Qualitative characteristic

Type

☐ Charac. attribute

Sample

☐ Sampling Procedure

☐ Additive Sample

☐ SPC Characteristic

☐ Destructive insp.

☐ Record no. of defs

Results confirmation

☒ Summ.recording

☒ Required char.

☐ Single Result

☐ Optional char.

☐ No charac. rec.

☐ After accept.

☐ Classed Recording

☐ After Rejection

☐ Defects Recording

Continue

Check

Cancel

Select the checkboxes for *Charac. Attribute*, *Sampling Procedure*, *Summary Recording* and *Required Characteristic*. Afterwards proceed by clicking on **Continue**.

Charac. Attribute
Sampling proc.
Summ.Recording
Required Charact.

A second view for Control Indicators pops up.

Edit Characteristic Control Indicators

Ch 0010 Check Packing

Qualitative characteristic

Insp. scope

☐ Scope Not Fixed

☒ Fixed Scope

☐ Smaller Scope

☐ Larger Scope

Docu. confirmation

☒ No documentation

☐ Docu. if rejected

☐ Docu. required

Miscellaneous

☐ Long-term inspection

☐ Scrap share/ q-score

☐ RR change docs


☐ Test-equi assignment

Print

☒ Print

☐ Do Not Print

✓

Select *Fixed scope*, *No documentation*, *Scrap share/ q-score* and *Print*. And Proceed with .

Fixed scope
No documentation
Scrap share/ q-score
Print

PACK
DL00

In the *Create Inspection Plan: Catalogs* screen, enter **PACK** as *CGr/SSet* and **DL00** as *Plant*.

SAP

Create Inspection Plan: Catalogs

More

Exit

Material

ORWN1000

Women's Off Road BiGrp.Count1

Activity:

0010

Quality Inspection

Characteristic:

10

Packing OK

Qualitative insp. char. with char. attributes, Summarized recording, Required char., Fixed scope

General data

Catalogs

Sample

Catalogs

Catalog Type	S	CGr/SSet	Plant	Short Text for Code Group/Selected
1	<input checked="" type="checkbox"/>	PACK	DL00	
<input type="checkbox"/>	<input type="checkbox"/>			
<input type="checkbox"/>	<input type="checkbox"/>			
<input type="checkbox"/>	<input type="checkbox"/>			
<input type="checkbox"/>	<input type="checkbox"/>			

Defect Codes for Rejection

General:

Proceed with Enter.

In the *Create Plan: Dynamic Modification* screen, enter **100% - 0** as *Sampling Procedure*. Further enter **EA** as *Sample unit of meas.*

100% -0
EA

Proceed with Enter and you are back in the *Create Inspection Plan: Characteristics Overview* screen.

Repeat the previous steps for Char. 20 using *Master Insp. Char.* **COLOR**.

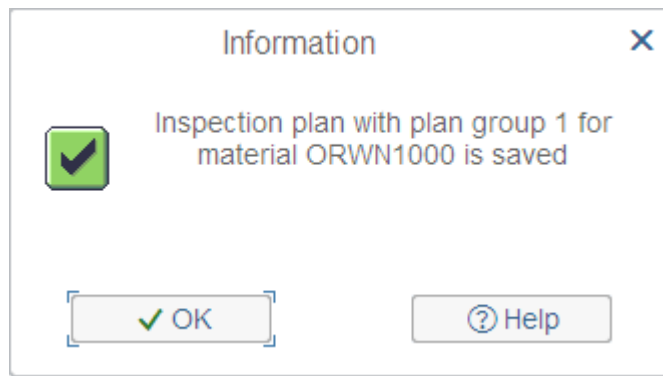
COLOR


Use the *Short Text Insp. Char* **Color OK** and make sure to enter **COLOR** as *CGr/SSet* in the *Create Inspection plan: Catalogs* screen.

Color OK
COLOR

All the other data can be used as for char. 10 PACK.

Proceed with Enter to save.



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



Step 5: Create Stock Transport Order

Tsk Create Stock Transport Order

Time 10 min

Short Description

In this task, you create a Stock Transport Order for 10 Women’s Off Road Bike from Dallas to San Diego

Name (Position)

Sanjay Datar (Warehouse Employee Dallas)

To create a stock transport Order, follow the menu path:

Logistics ▶ Material Management ▶ Purchasing ▶ Purchase Order
▶ Create ▶ Vendor/Supplying Plant Known

Menu path

In the *Create Purchase Order* screen, enter **Stock Transp. Order** as *Order Type*. As *Supplying Plant* choose **DL00**. As *Org. Data* enter **US00** as *Purchase Org.*, **N00** as *Purch. Group* and **US00** as *Company Code*.

Stock Transp. Order
DL00
US00
N00
US00

<

SAP

Create Purchase Order

Document Overview On

Create

Other Purchase Order

Hold

Check

More

UB Stock Transp. Order

Supplying Plant: DL00

Doc.

Delivery/Invoice

Conditions

Texts

Address

Communication

Partners

Additional Data

Org. Data

Purch. Org.: US00

Purch. Group: N00

Company Code: US00

In the *Line Item* section enter the *Material* **ORWN1###** with a *PO Quantity* of **10**. The *Delivery Date* shall be **one week from today’s date**.
As *Plant* enter **SD00** and choose the *Stor. Location* **FG00**.

ORWN1###
10
One week from today
SD00
FG00

	Itm	A	I	Material	Short Text	PO Quantity	O...	Deliv. Date	Matl Group	Plnt
	10		U	ORWN1000	Women's Off Road Bike	10	EA	D 05.12.2017	Finished Bikes	DC

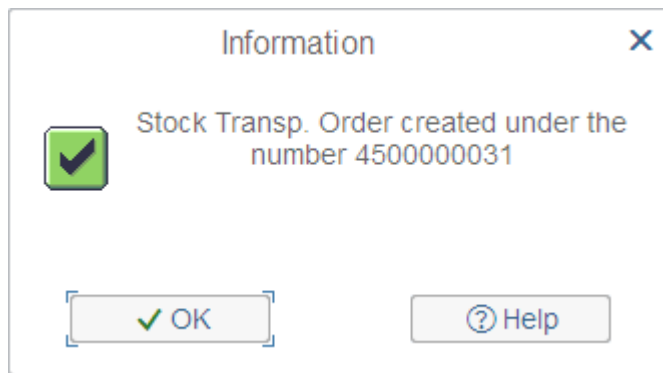
Click on


Save

 to save.

The system wants to make sure that the delivery date can be met.

You will get a message, that your Order is created.



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



Step 6: Post Goods Issue

Task Create goods issue

Time 10 min

Short Description In this task, you ship the materials to San Diego by posting goods issue.

Name (Position) Juriko Hamada (Shipping Clerk Dallas)

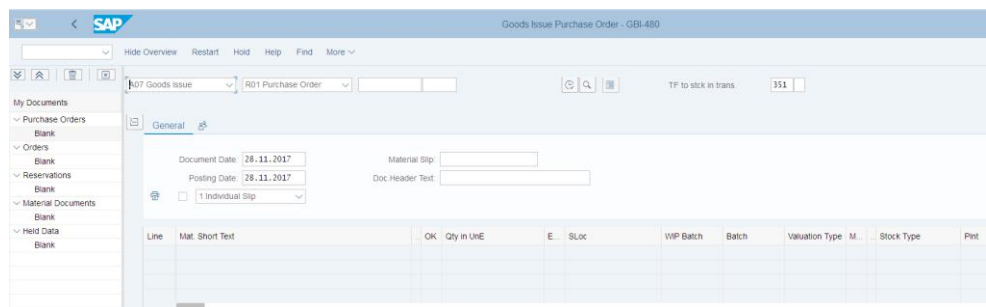
Posting goods issue reduces the inventory quantities and value in Dallas.

Follow the menu path:

Logistics ▶ Materials Management ▶ Inventory Management ▶ Goods Movement ▶ Goods Movement

This will produce the following screen.

Menu path



In the “Goods Receipt Purchase Order” screen, choose **Goods Issue** and **Purchase Order**.


Goods Issue
Purchase Order

A07 Goods Issue


R01 Purchase Order


Enter *Movement type* **351** and enter your **Stock Transport Order Number**. Proceed with Enter.

351
Order Number

Your data from the stock transport order is copied to the line item section. Enter **FG00** as *Storage Location* and mark your line with the 10 Women’s Off Road Bikes as OK. If the “Detail Data” section is active you have to make your entries there or close the section with a click on .

FG00
Check - OK

Click on  (POST). You will receive a message that says “Material document posted”.

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

Step 7: Display the Inspection Lot

Task Display the Inspection Lot.

Time 10 min

Short Description In this task, you Display the Inspection Lot, which is created for the inspection.

Name (Position) Juriko Hamada (Shipping Clerk Dallas)


To create a sales order, follow the menu path:

Logistics ► Quality Management ► Quality Inspection ► Inspection Lot ► Processing ► Display

Menu path

This will produce the following screen.

The screenshot shows the SAP 'Display Inspection Lot: Initial Screen'. At the top, there is a blue header bar with the SAP logo on the left and the title 'Display Inspection Lot: Initial Screen' on the right. Below the header, there is a navigation bar with a dropdown menu on the left, followed by the tabs 'Defects', 'Results', and 'Usage Decision'. To the right of these tabs are a magnifying glass icon, the text 'More', and an 'Exit' button. The main area of the screen is light blue and contains a label 'Inspection Lot:' followed by a text input field. To the right of the input field is a small icon representing a document with a magnifying glass, used for searching.

If your Inspection Lot is not filled automatically use the search  icon and enter your material number. Proceed with enter.

You find yourself in the “*Display Inspection Lot*” screen.

Display Inspection Lot

Inspection InstructionStockChange HistoryAdministrative DataMore

Plant:DL00Plant Dallas

Inspection Lot:20000000008

Material:ORWN1000

Description:Women's Off Road Bike

Insp. Lot Orig.:02 Goods Issue

Inspection Type:02Goods issue inspection

System Status:REL CALCUser Status:

Data for Lot OriginInspection Lot QuantitiesInspection SpecificationsUsage DecisionData for Account A...

Scheduling data

Start Date:13.12.2017End Date:13.12.2017

Data for goods receipt

Purchasing Doc.:4500000001Item:10

Material Doc.:49000002061Item:1PlantStock:DL00

Description

Short Text:

In the *Data for Lot Origin* tab you find the source which created the inspection lot. In this case you find your previous created material documents.

Scheduling data

Start Date:13.12.2017End Date:13.12.2017

Data for goods receipt

Purchasing Doc.:4500000001Item:10

Material Doc.:49000002061Item:1PlantStock:DL00

Description

Short Text:

In the *Insp. Lot Quantities* tab, you find information about the lot quantity and the size of the sample.

Data for Lot OriginInspection Lot QuantitiesInspection SpecificationsUsage DecisionData for Account A...


Quantities

Insp. Lot Qty:10EAMaterial Doc.

Actual Lot Qty:10Insp. Stock:GR blocked stck:

Sample Size:10EADestroyed Qty:0Defective Qty:0

Also check the other tabs for further information about the inspection lot.

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



Step 8: Perform Inspection and Record Results

Task Perform the inspection and recording of the resultsTime 5 min

Short Description In this task, you perform the inspection, you record the results, and you make the usage decision for the inspection lot.

Name (Position) Juriko Hamada (Shipping Clerk Dallas)

To perform the inspection, follow the menu path:Menu path

Logistics ▶ Quality Management ▶ Quality Inspection ▶ Worklist ▶ Results Recording

This will produce the following screen.


Enter the *Plant* **DL00** and for *Insp.lot origin* **02 (Goods Issue)**. Finally enter your *Material* **ORWN1###** and proceed with **Execute**.

DL00
02
ORWN1###

The first operation with the characteristic to be processed appears on the left, automatically.

On the main screen, you see information about the single operations.

General Summarized Indicators													
Further details													
Ac.	R.	Short Text for Character...	Specifications	Inspect	Inspected	Sl.	Result	Original Value	V...	Defect Cl...	Attribute	Insp. Descriptn	L. C.
		1 Packing OK	Packing OK	10									
		1 Colour OK	Color OK	10									

Highlight the first line and click on the  icon

Material:

Women's Off Road Bike

Charc No.:

Status:

Attribute:

Addnl info:

Packing OK

Valuation:

ResDatOrgn:

Position:

Specs: Fixed Insp. Scope

Results

Inspect: 10: * 1,00: EA

Inspected:

Nonconf.:

Cat. type: 1

Attribute:

Code:

Plant: DL00


CGr/SetSet: PACK

Code Group:

Packing OK

On the *Record Results for ORWN1###: Characteristic Single Screen* enter in the *Results* section **10** as amount *Inspected* and Code **Green (4)**. The *Code group COLOR* should be filled in automatically.

10
4

Click on the *Valuate* button .

The status should change to *Valuated*.

Material:

Women's Off Road Bike

Charc No.:

Status:

Attribute:


Addnl info:


Packing OK

Valuation:


ResDatOrgn:

Position:

Click on the  icon to close the characteristic.

Save your progress by clicking on .

Return to *0010 Quality Inspection* and perform the results recording for the *Color*.

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



Step 9: Make Usage Decisions of Inspection Lots

Task Make Usage Decisions on Inspection Lots

Short Description In this task, you make usage decisions on the inspected lots that you performed in the previous step

Name (Position) Juriko Hamada (Shipping Clerk Dallas)

Time 10 min

To perform the usage decision, follow the menu path:

Logistics ▶ Quality Management ▶ Quality Inspection ▶ Inspection Lot ▶ Usage Decision ▶ Record

Menu path


This will produce the following screen.


On the *Record Usage Decision: Initial Screen* choose your Inspection Lot and proceed with Enter to produce the following screen.

Your Inspection Lot

In the Usage decision section at the bottom, use the F4-Help to find the *UD code* for **Goods issue** and **Accept**.

Goods issue
Accept

Click on  to save you usage decision.

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

Step 10: Create Goods Receipt

Task Create Goods Receipts

Time 5 min

Short Description In this task, you receive the materials into San Diego.

Name (Position) Yoshi Agawa (Receiving Clerk San Diego)

Follow the menu path:

Logistics ▶ Material Management ▶ Inventory Management ▶ Goods Movement ▶ Goods Movement

This will produce the following screen.

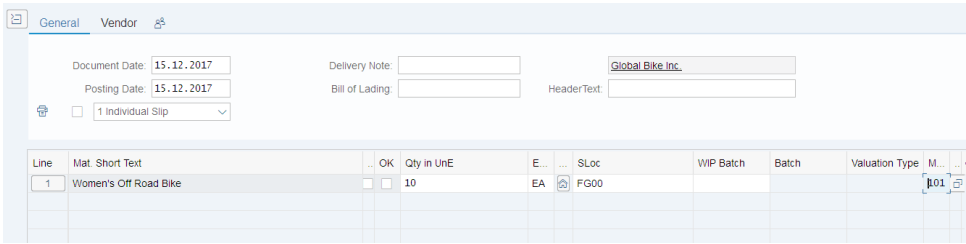
Menu path


On the *Goods Issue Purchase Order* screen change the *Trans./Event* to **Goods Receipt**. As *Reference Document*, choose **Purchase Order**.

Goods Receipt
Purchase Order

Use the F4-Help to choose your Purchase Order. Afterwards proceed with enter.


Your Purchase Order


A screenshot of the SAP 'Goods Receipt' screen. The 'General' tab is active. Fields include 'Document Date' (15.12.2017), 'Posting Date' (15.12.2017), 'Delivery Note' (empty), 'Bill of Lading' (empty), 'HeaderText' (empty), and 'Vendor' (Global Bike Inc.). A table below shows one line item: Line 1, Material 'Women's Off Road Bike', Quantity 10, Unit of Measure 'EA', Storage Location 'FG00', and Movement Type '101'. The 'Item OK' checkbox is checked.

If the Details data is active, close it by clicking on .

Enter the *movement Type* **101** and as *Storage Location* **FG00**. At last check the *Item OK*-checkbox.

101
FG00
Item OK

Click on  (POST). You will receive a message that says, “Material document posted”.

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

Step 11: Create Transfer Order

Task Create Transfer Order

Time 5 min

Short Description In this task, you create a transfer order for your materials.

Name (Position) Sunil Gupta (Warehouse Employee San Diego)

Follow the menu path:

Logistics ▶ Logistics Execution ▶ Inbound Process ▶ Goods Receipt for Purchase Order, Order, Other Transactions ▶ Putaway ▶ Create Transfer Order ▶ For Material

Menu path

This will produce the following screen.

<

SAP

Display Transfer Requirement: List for Material

More

Exit

Warehouse Number

Material

Plant

Stor. location

Batch

Shipment Type

Stock Cat.

Special Stock

Status of Movement

☐ Processing Complete

General Selection Criteria

Transfer Priority:

Execute From (Date):

Execute to (Date):

In the “Display Transfer Requirement: List for Material” screen, enter the Warehouse Number **100**, the Material **ORWN1###**, the Plant **SD00** and the Storage Location **FG00**. Proceed with enter.

In the “Transfer Requirements for Material” screen, click on the **TO in Foreground** icon.

100
ORWN1###
SD00
FG00



Step 12: Confirm Transfer Order I

Task Confirm Transfer Order I

Time 5 min

Short Description In this task, you create a transfer order for your materials.

Name (Position) Sunil Gupta (Warehouse Employee San Diego)

Follow the menu path:

Logistics ► Logistics Execution ► Inbound Process ► Goods Receipt for Purchase Order, Order, Other Transactions ► Putaway ► Confirm Transfer Order ► Single Document ► In One Step

Menu path

This will produce the following screen.

<

SAP

Confirm Transfer Order: Initial Screen

Standard

Input List

Pack

More ▾

* TO Number: 2001

* Warehouse Number: 100

Selection

☐ Open TO items

☐ Subsystem items

Storage Type:

Picking Area:

Control

Foreground/Backgrnd: H Foreground ▾

Adopt Pick Quantity:

Adopt putaway qty:


☐ Close TR

Confirmation

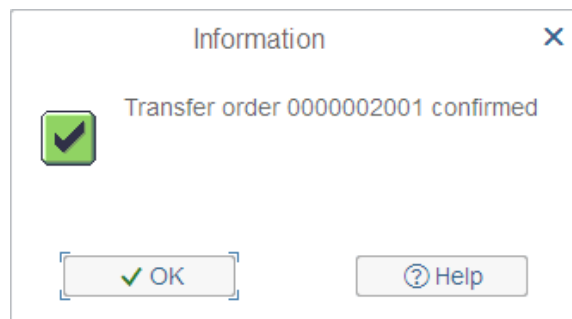
⏮


Back - transfer

Proceed with Enter.

On the “*Confirm Transfer Order: Overview of Transfer Order Items*” screen, click on the  icon to post your transfer order.

You will receive the message that the transfer order is confirmed.



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



Step 13: Create Sales Order

Task Create a sales order.

Time 10 min

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

Name (Position) Karl Gruber (Salesperson 2 San Diego)

To create a sales order, follow the menu path:

Logistics ▶ Sales and Distribution ▶ Sales ▶ Order ▶ Create

This will produce the following screen.

Menu path

< **SAP** Create Sales Document

More

* Order Type: OR

Organizational Data

Sales Organization: UW00

Distribution Channel: WH

Division: BI

Sales office:

Sales group:

In the “*Create Sales Document*” screen, enter the *Order Type* **OR**. As organizational Data, enter the *Sales Organization* **UW00**, the *Distribution Channel* **WH** and the *Division* **BI**. Proceed with enter.

OR
UW00
WH
BI

In the “*Create Standard Order: Overview*” screen, search **your customer** with the F4-Help as *Sold-To-Party*. Also, enter **your customer** as *Ship-To-Party*. As *Cust. Reference*, enter **PO-###**. Enter the **current date** as *Cust. Ref. Date*.

Your Customer Number
PO-###
Current date

< **SAP** Create Standard Order: Overview

Display Propose Items Header Output Preview Reject Document Loading Units and Aggregates

Standard Order:

Sold-To Party: 25006


Ship-To Party: 25006


Cust. Reference: PO-000

Net Value: 0.00

Cust. Ref. Date: 15.12.2017

In the All Items section enter the *Material* **ORWN1###** with an *Order Quantity* of **10**.

Confirm your entries with enter and then Save with .

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

ORWN1###
10



Step 14: Create Outbound Delivery

Task Create Outbound Delivery.

Time 5 min

Short Description In this task, you prepare the material for shipment by creating an outbound delivery, which contains the storage location from which the materials will be picked and the shipping point to which the material will be delivered for shipment.

Name (Position) Zarah Morello (Shipping Clerk San Diego)

Follow the menu path:

Logistics ▶ Sales and Distribution ▶ Shipping and Transportation ▶ Outbound Delivery ▶ Create ▶ Single Document ▶ With References to Sales Order

Menu path

This will produce the following screen.

< **SAP** Create Outbound Delivery with Order Reference

W/o Order Reference Overview More Exit

* Shipping Point:

Sales Order Data

Selection Date:

* Order:

From Item:

To Item:

Predefine Delivery Type

Delivery Type:

Your Previous created order number should be already entered. If not use the F4-Help to enter **your Order number** as *Order*.

Your Order Number

Further, enter **SD00** as *Shipping Point* and the **Current Date** as *Selection date*. Proceeding with enter, results in the following screen.

SD00
Current Date

< SAP

Outbound Delivery Create: Overview

Other Outbound Delivery

Header Details

Pack

Incompleteness

Post Goods Issue

More

Exit

Outbound Deliv.:

Document Date: 15.12.2017

Ship-To Party: 25006

Quality Bikes / Lusk Blvd. 25 / San Diego CA 92121

Item Overview

Picking

Loading

Transport

Status Overview

Goods Movement Data

Planned GI: 15.12.2017 00:00...

Total Weight: 95.600 G

Actual GI Date: 00:00

No. of Packages:

All Items

Item	Material	Deliv. Qty	Un	Description
10	QRWN1000	10	EA	Women's Off Road Bike

Switch to the Picking tab and enter **FG00** as *Storage Location (SLOC)*.

FG00

All Items

Item	Material	Plnt	SLoc	Deliv. Qty	Un
10	QRWN1000	SD00	FG00	10	EA

Save your outbound delivery by clicking on **Save**.

Information

Outbound Delivery 80000003 has been saved

OK

Help

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

Step 15: Transfer Stock from Warehouse Management

Task Transfer stock from Warehouse Management.

Time 10 min

Short Description Use the SAP Easy Access Menu to transfer stock from warehouse management.

Name (Position) Zarah Morello (Shipping Clerk San Diego)

Follow the menu path:

Logistics ▶ Sales and Distribution ▶ Shipping and Transportation ▶ Picking ▶ Create Transfer Order ▶ Single Document

This will produce the following screen.

Menu path

< **SAP** Create Transfer Order for Delivery Note: Initial Screen

More ▾

* Warehouse Number: 100

Plant: SD00

* Delivery: 80000003

Group:

Control

☒ Activate Item

Foreground/Backgrnd: System-Guided ▾


Adopt Pick Quantity: ☐

Adopt putaway qty: ☐

Putaway TO proc.: ☐

In the “Create Transfer Order for Delivery Note: Initial Screen” screen, enter the Warehouse Number **100**, the Plant **SD00** and search for your Delivery Number if not filled in automatically. Select the Checkbox for **Activate Item**. Choose **System-Guided** as *Foreground/Backgrnd Processing*. Finally choose **Include picking quantities in delivery (1)** for *Adopt Pick Quantity*. Proceed with enter.

Post your transfer order by pressing Enter and then **Posting**.

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

100
SD00
Your Delivery Number
Activate Item -checked
System-Guided
1

Step 16: Confirm Transfer Order II

Task Confirm Transfer Order II

Time 5 min

Short Description In this task, you will confirm the transfer order for your materials.

Name (Position) Zarah Morello (Shipping Clerk San Diego)

Follow the menu path:

Logistics ▶ Logistics Execution ▶ Inbound Process ▶ Goods Receipt for Purchase Order, Order, Other Transactions ▶ Putaway ▶ Confirm Transfer Order ▶ Single Document ▶ In One Step

Menu path

This will produce the following screen.

In the “*Confirm Transfer Order: Initial Screen*”, enter your *TO Number* and the *Warehouse Number 100*.

Your TO Number
100

Make sure, *Pick + Transfer* is checked in the *Confirmation* section. Proceed with Enter.

Pick + Transfer

Review your confirmation Data.

<

SAP

Confirm Transfer Order: Overview of Transfer Order Items

Confirm Internally

Single Item

Header

Select All

Deselect All

Enter Actual Data

Pack

More ▾

Warehouse No.: 100

Creation Date: 15.12.2017

TO Number: 2002

Group:

Items

D	Material	Plnt	Batch	S	Typ	Stor. Bin	Target Quantity	Alt	C
<input checked="" type="checkbox"/>	ORWN1000	SD00		S	002	STBN-7-000	10	EA	
1	Women's Off Road Bike			D	004	0080000003	10		

Confirm your transfer order with

Posting

.


Information

☒

Transfer order 0000002002 confirmed

OK

Help

Click on the exit icon  until you are on the SAP Easy Access screen.



Step 17: Ship Materials

Task Ship the ordered materials to your customer.

Time 10 min

Short Description In this task, you ship the material to the customer by posting goods issue. Posting goods issue indicates a change in ownership in the goods and reduces the inventory quantities and value in the inventory quantities and value in the San Diego plant

Name (Position) Zarah Morello (Shipping Clerk San Diego)

Follow the menu path:

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

Menu path

This will produce the following screen.

Use F4 and Enter to enter your **Outbound Delivery** if not automatically filled in. Proceed with enter.

Your Outbound Delivery

On the Picking tab, confirm that the Picked Qty. matches the Deliv. Qty. Also, check the Plant and Storage location fields.

Item Overview

Picking

Loading

Transport

Status Overview

Goods Movement Data

Pick Date/Time:

15.12.2017

00:00..

OvrllPickStatus:

C

Fully picked

Warehouse No.:

100

San Diego Warehouse

OverallWMStatus:

C

WM trsf ord confirmd

All Items


<input type="checkbox"/>	Itm	Material	Pint	SLoc	Deliv. Qty	Un	Picked Qty	Un	Batch
<input type="checkbox"/>	10	GRWN1000	SD00	FG00	10	EA	10	EA	

Click on the Loading tab and review the information

Click on the Shipment tab and review the information

Click on the Status Overview and review the information.

Click on **Post Goods Issue** to finish the task.

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



Step 18: Create Invoice

Task Create the invoice for your customer.

Time 10 min

Short Description In this task, you will prepare the invoice that you use to bill a customer.

Name (Position) Stephanie Bernard (Billing Clerk)

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

Logistics ▶ Sales and Distribution ▶ Billing ▶ Billing Document ▶ Create

Menu path

This will produce the following screen.

< SAP

Create Billing Document

Billing Due List

Billing Documents Overview

Selection Date

Selection List

More Documents

Default Data

Billing Type:

Serv. Rendered:

Billing Date:

Pricing date:

Docs to be Processed

	Document	Item	SD Document Cat.	Processing Status
<input type="radio"/>	00000003	<div></div>		
<input type="radio"/>				
<input type="radio"/>				
<input type="radio"/>				
<input type="radio"/>				
<input type="radio"/>				
<input type="radio"/>				
<input type="radio"/>				
<input type="radio"/>				
<input type="radio"/>				

On the “Create Billing Document” screen, enter **your outbound delivery number** from Step 13 as *Document*.

Your outbound delivery

Proceed with Enter.

<

SAP

Invoice (F2) Create: Overview of Billing Items

Pricing Conditions Header

More

F2 Invoice

\$000000001

Net Value: 25.000,00 USD

Payer: 25006

Quality Bikes / Lusk Blvd. 25 / San Diego CA 92121

Billing Date: 15.12.2017

On the “Invoice (F2) Create: Overview of Billing Items” screen, click on the

Save

 icon.

You will receive a message, that your Document has been saved.

Information

Document 90000003 saved (no accounting document generated).

OK

Help

Click on the exit icon

<

 to return to the SAP Easy Access screen.



Step 19: Review Document Flow

Task Review the document flow.

Time 5 min

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

Name (Position) Catherine Dubios (West Rep. San Diego)

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:

Logistics ▶ Sales and Distribution ▶ Sales ▶ Order ▶ Display

Menu path

This will produce the following screen.

The screenshot shows the SAP 'Display Sales Document' interface. At the top, there's a blue header with the SAP logo and the title 'Display Sales Document'. Below the header is a navigation bar with a dropdown menu, 'Display Document Flow', 'Status Overview', 'More', and 'Exit'. The main area is light blue and contains a search field labeled 'Order:' with the value '4' and a magnifying glass icon. Below this is a section titled 'Search Criteria' with several input fields: 'Purchase Order No.', 'Sold-to party:', 'Delivery:', 'Billing Document:', 'WBS Element:', and 'Material:'. At the bottom is a 'Search' button with a magnifying glass icon.

If your sales order is not displayed, you can search for you sales order number using the Sales document according to customer PO number tab. Enter your PO number (PO-###).

PO-###

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

Environment ▶ Display document flow

The document flow for Quality Bikes will look like the following.

Details Status Overview Display Document Service Documents Graphic More

Business Partner


0000025014 Quality Bikes

Material

ORWN1604 Women's Off Road Bike

Document	Quantity	Unit	Ref. Value	Currency	On	Status
→ Standard Order 0000000014 / 10	10	EA	25.000,00	USD	07.05.2018	Completed
↓ Outbound Delivery 0080000011 / 10	10	EA			07.05.2018	Completed
WMS Transfer Order 0000002028 / 1	10	EA			07.05.2018	Completed
GD goods issue:delvy 4900005086 / 1	10	EA	12.500,00	USD	07.05.2018	Complete
↓ Invoice 0090000004 / 10	10	EA	25.000,00	USD	07.05.2018	Completed
Accounting Document 0090000004	10	EA			07.05.2018	Not Cleared

Review the documents for Quality Bikes’ order. You may select any document and click on **Display Document** to look at it in detail.

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



Step 20: Receive Payment from Customer

Task Receive the Payment for the previously processed order. **Time** 10 min

Short Description Use the SAP Easy Access Menu to receive payment from your customer.

Name (Position) Stephanie Bernard (Billing Clerk)

Follow the menu path:

Accounting ► Financial Accounting ► Accounts Receivable ► Document Entry ► Incoming Payments

Menu path

This will produce the following screen.

Enter the **current date** for the *document date*. Enter **US00** for *Company Code*, **USD** for *Currency/Rate*, **100000 (your bank GL Number)** for *Account*, and the **amount from the Sales Order** to be paid in the *Amount* field.

Current date
US00
USD
100000
25000


Under Open item selection, enter the **customer number** from the Sales Order in the *Account* field.

Your customer number


Once the information has been entered, proceed with enter or click on **Process Open Items**.


On the “Post Incoming Payments Process open items” screen, check the *Not assigned* value under Processing Status. Make sure, this value is 0.00.

Processing Status			
Number of items	<input type="text" value="1"/>	Amount entered	<input type="text" value="25,000.00"/>
Display from item	<input type="text" value="1"/>	Assigned	<input type="text" value="25,000.00"/>
Reason code	<input type="text"/>	Difference postings	<input type="text"/>
Display in clearing currency		Not assigned	<input type="text" value="0.00"/>

Click on the post icon  to finish the payment process.

You will get the following confirmation:

 Document 1400000004 was posted in company code US00

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

