SD 1: Display Customer Master Data

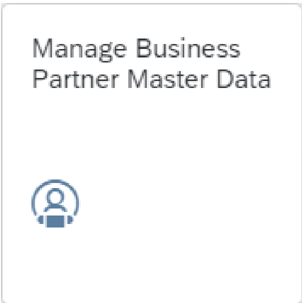
Exercise Use the SAP Fiori Launchpad to display a customer. **Time** 10 min

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

Name (Position) Maria Diaz (Sales Person 1 US East)

Start

To display a customer, in the space *Sales and Distribution* space and the section *Sales Person*, locate and open the *Manage Business Partner Master Data* app.



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

Business Partner

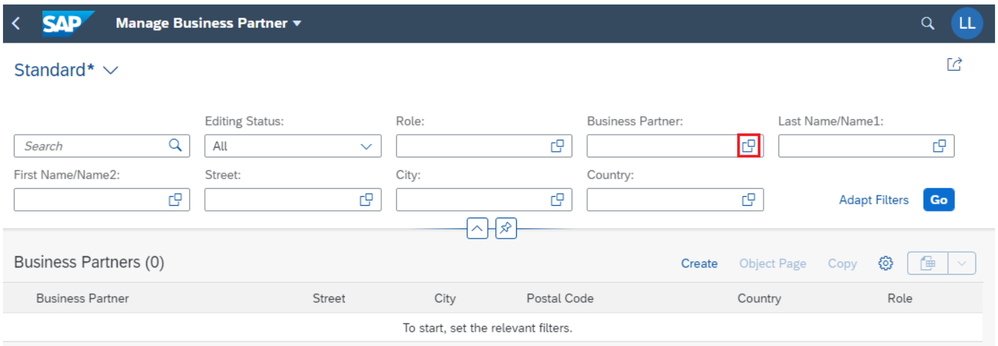
A business partner (BP) is an organization (firm, branch office), person, or a group of persons or organizations in which your company has a business interest.

You can create and manage your business partners and their roles centrally in a company. For this purpose, you enter the general data of the BP once and assign business partner roles (BP roles) to them. For each BP role, specific data is stored. This general data is ‘independent’ of the role the partner performs in the different business processes in S/4HANA. This prevents data from being created and stored redundantly.

Structure: For each BP, you specify a unique business partner number (BP number). You create and manage the following general elements of a BP:

- general data, e.g. name, address, and communication data
- identification data, e.g. industry, identification, and tax numbers
- status data, e.g. status of the business relationship

During the course of the business relationship, the business partner can assume other business partner roles. When a partner appears in a new role, you only need to add their master data, as the general data remains unchanged.

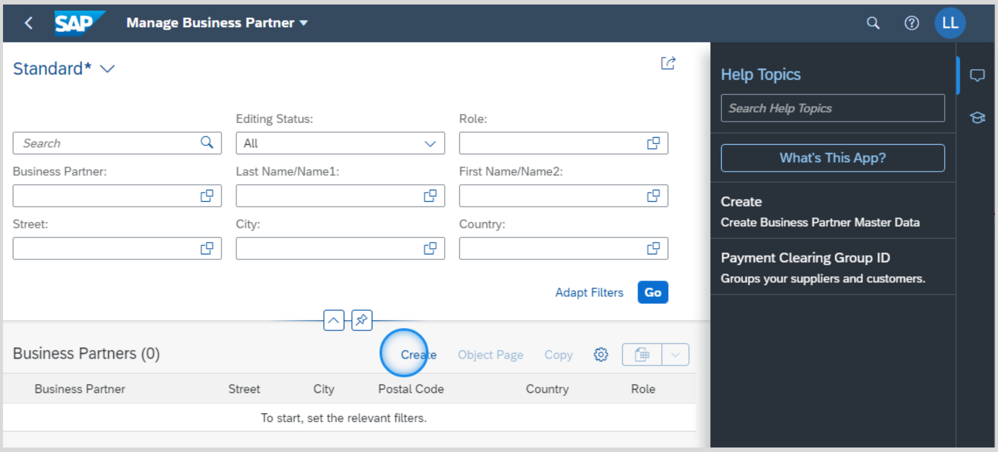


Since you do not know any business partner (and in our case a customer number) in the Global Bike company, you need to find one. In order to do so, in the *Business Partner* field click the input help icon.

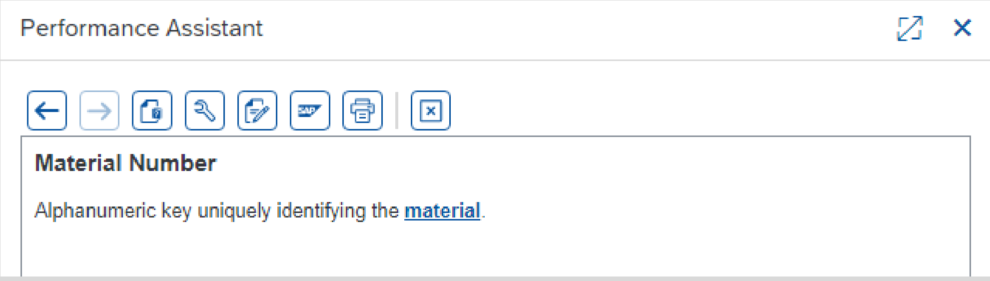
Besides the input help, you can use the SAP ad-hoc help (**F1**) to have the system explain particular fields on the screen. The help differs depending on the app type (Fiori or SAP GUI for HTML).

Help Topics

If you are using a native Fiori app, the *Help Topics* will open at the right edge of the screen and optionally, blue circles are appearing for specific terms. Either you can find further information in the help topics or you can click on one of the blue circles to open the corresponding help entry directly.

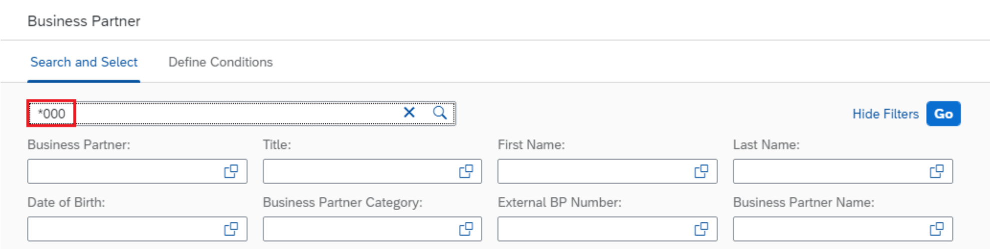


On the other hand, if you are using an SAP GUI for HTML app, the Performance Assistant popup will appear, providing you with information about the currently selected field.



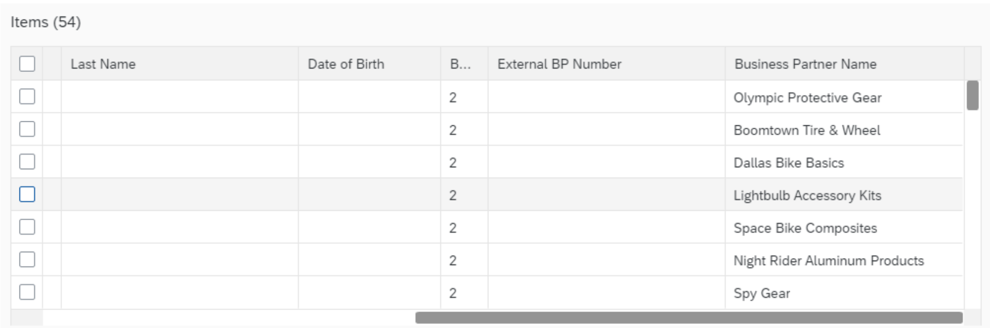
Using the input help for business partners, you have the possibility to specify different search criteria. Since business partners also include persons, it is also possible to filter by first and last name.

This time, please use the overall *Search* field. Enter an asterisk (*****) followed by your **three-digit number** (###). *###

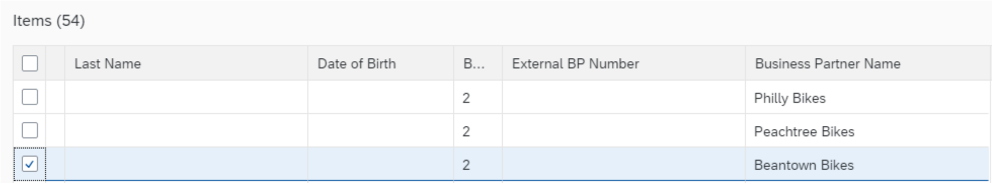


Note Each time the curriculum material requests you to type in ###, please enter the three-digit number you received from your instructor. Since each participant receives his or her own master data, the three-digit number serves to distinguish between the individual data sets. Please remember that all 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).

Click Go to start searching. A list of all business partners in your data set will be displayed. Scroll to the right in the results table to see the business partner names.



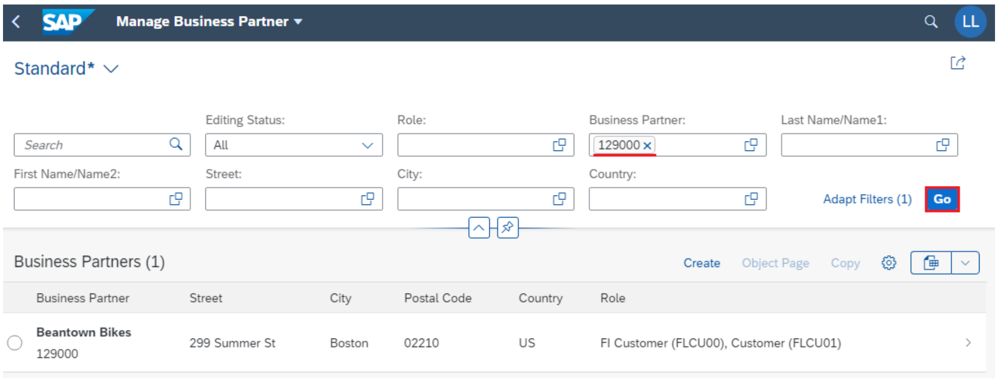
Scroll through the list and select the business partner *Beantown Bikes*. Then, click on OK, so apply the selection.



Items (54)

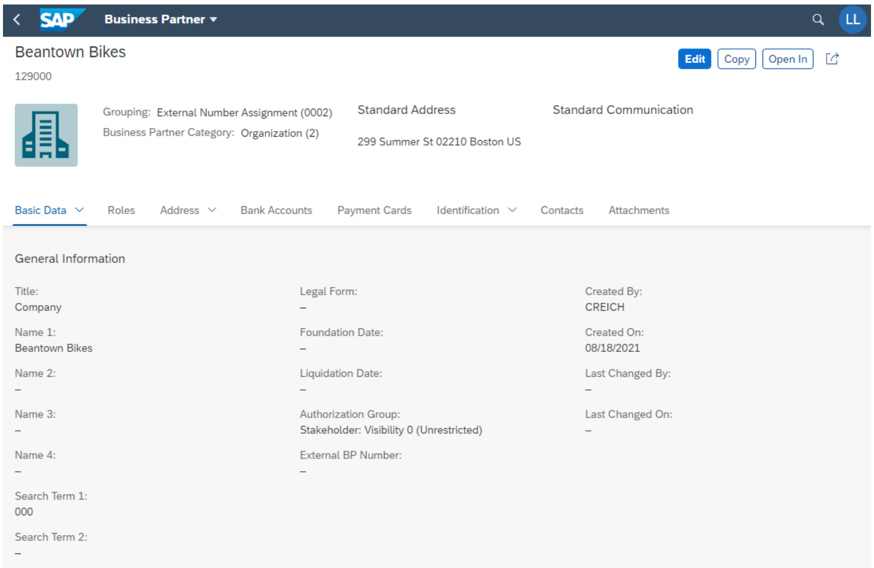
	Last Name	Date of Birth	B...	External BP Number	Business Partner Name
☐			2		Philly Bikes
☐			2		Peachtree Bikes
☑			2		Beantown Bikes

The BP number will be displayed in the *Business Partner* field. Now click Go. The record of the business partner is displayed.



Note The simplification of data structures is one of the major ideas of SAP S/4HANA. For this reason, various transactions, such as the management of debtors, creditors or contact persons, have been combined into one transaction (*Manage Business Partner Master Data*).

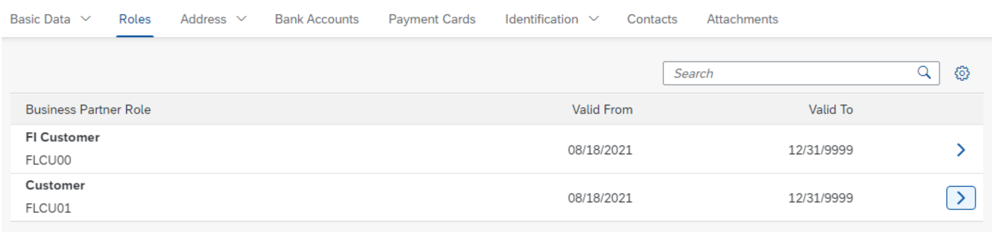
Click on the dataset of your business partner. This screen displays the general data of your customer Beantown Bike. In the context of the SAP system, this data implies all information about the customer that are relevant for the whole company such as global names and the address. These can be viewed by different departments and do not differ. Click the other tabs in order to see further global data about Beantown Bikes.



Roles

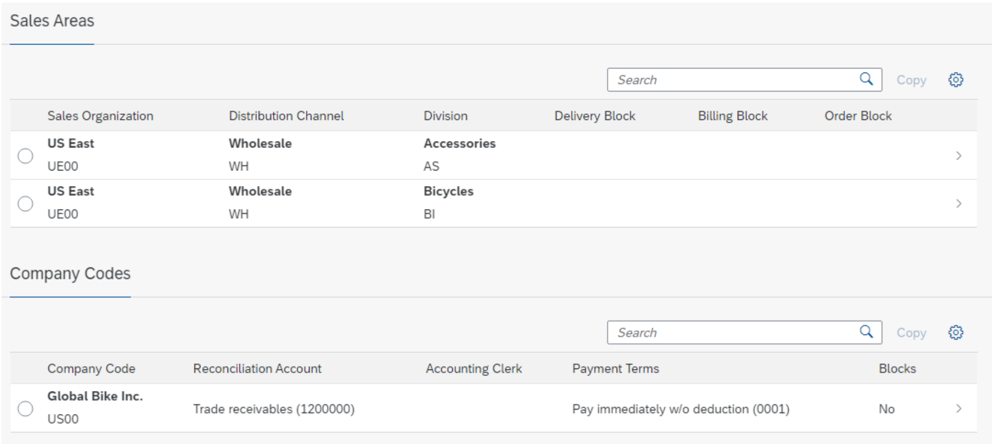
Please select the *Roles* tab. Via auto-scroll, you will take to the correct position. There, you will see that two roles are assigned to the business partner: FI Customer and Customer. Within the **Customer | (FLCU01)** BP Role row, click on >

Customer | FLCU01



Sales Areas

Subsequently, click the *Sales Areas* tab to get information about the sales data from your customer Beantown Bikes. Below the sales areas, you can see the company codes. This information could not be found in the general overview, because this data is linked to the customer role.



Click on SAP to return to the SAP Fiori launchpad.

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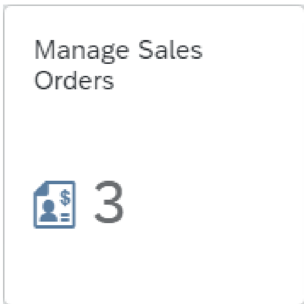
SD 2: Display Customer Order

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

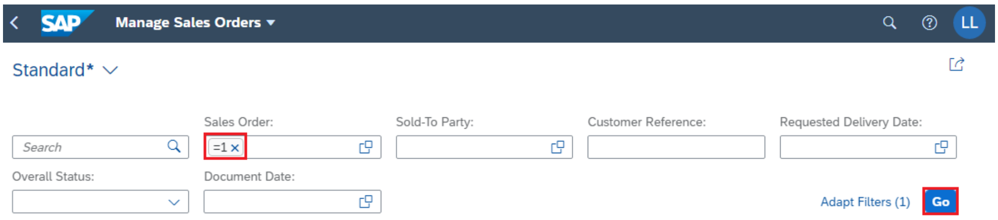
Task Display a customer order for black Deluxe Touring Bikes.

Name (Position) David Lopez (Sales Representative US East)

In the space *Sales and Distribution* and the section *Sales Representative*, use the *Manage Sales Orders* app to display a sales order. Start

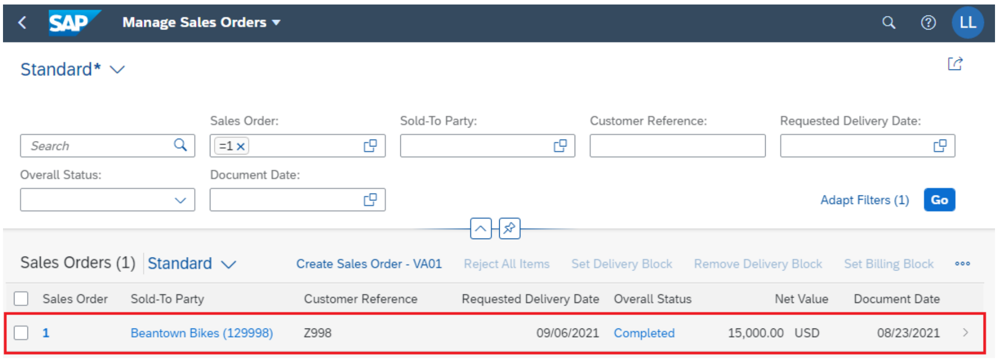


In the *Sales Order* field, enter **1**. Click Go to search for the document for an already created sales order. The corresponding order will be displayed. 1



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



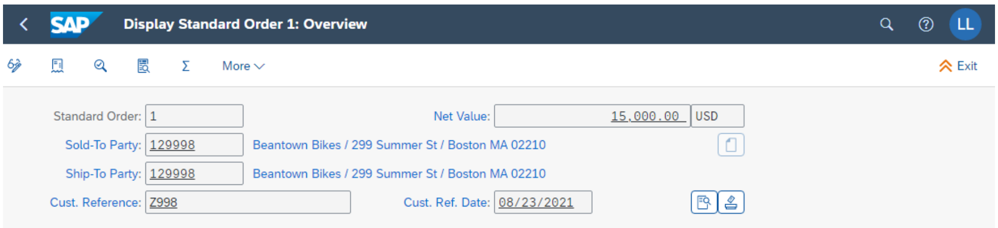
To get more information click the line of the identified sales order. In the next screen, all details of the order placed by the company Beantown Bikes from Boston are displayed.

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 1. As you can see, this sales order is listed under the Cust. Reference number Z998 and its net value amounts to $15,000.00.

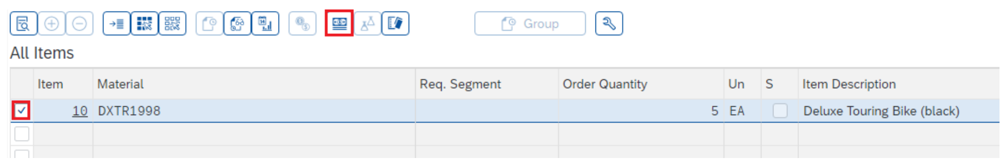


Note The purchase order number must not be confused with the number of the sales document, which in this case is the document of a standard order.

Whereas the purchase order number can be assigned freely, the document number is generated automatically while compiling the document.

In the *All Item* overview, you can see that the order only contains the product Deluxe Touring Bike (black). Beantown Bike ordered five of these bicycles.

Please select the line presenting the Deluxe Touring Bike (black). Subsequently, please click (*Item Conditions*) to display all conditions.



All Items

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

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

Pricing Elements

I...	CnTy	Description	Amount	Crcy	per	UoM	Condition Value	Curr.	Status	NumC...
	PR00	Price	3,000.00	USD	1	EA	15,000.00	USD		1
		Gross Value	3,000.00	USD	1	EA	15,000.00	USD		1
		Discount Amount	0.00	USD	1	EA	0.00	USD		1
		Rebate Basis	3,000.00	USD	1	EA	15,000.00	USD		1
		Net Value for Item	3,000.00	USD	1	EA	15,000.00	USD		1
		Net Value 2	3,000.00	USD	1	EA	15,000.00	USD		1
		Total	3,000.00	USD	1	EA	15,000.00	USD		1
	SKTO	Cash Discount	0.000	%			0.00	USD		0
	VPRS	Internal price	1,400.00	USD	1	EA	7,000.00	USD		1
		Standard - USA /With	1,600.00	USD	1	EA	8,000.00	USD		1

Click on SAP to return to the SAP Fiori launchpad.

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SD 3: Display Outbound Delivery Document for Sales Order

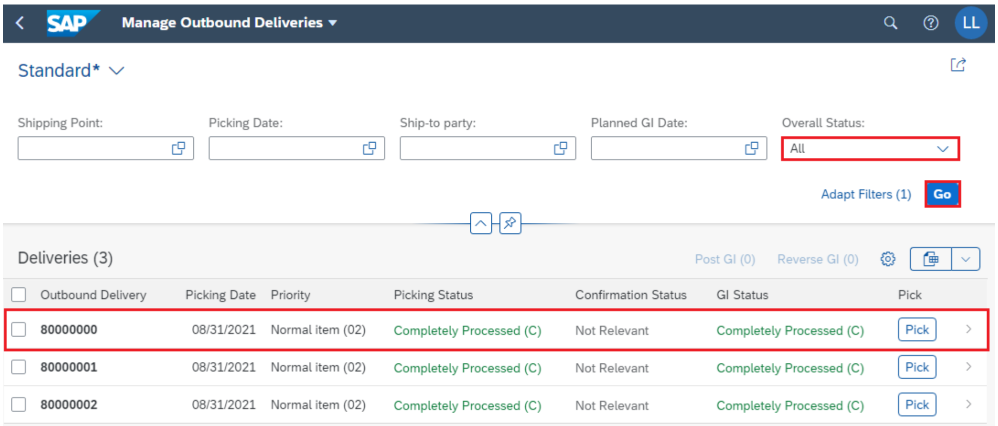
Exercise Use the SAP Fiori Launchpad to display an outbound delivery. **Time** 10 min

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.

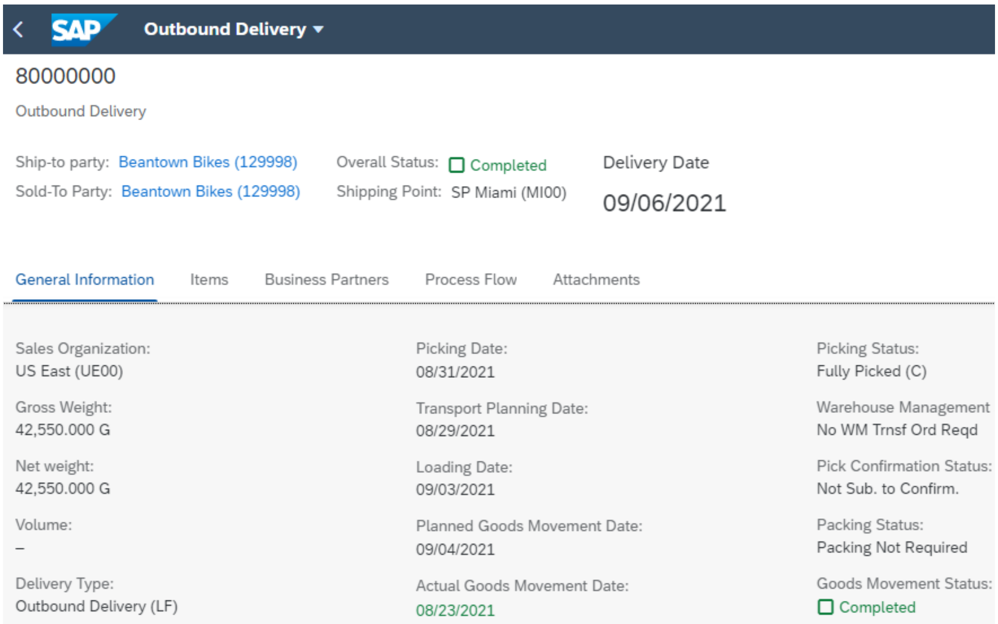
Name (Position) Sergey Petrov (Warehouse Employee)

In the space *Sales and Distribution* and the section *Warehouse Employee*, use the *Manage Outbound Deliveries* app to display an outbound delivery document for a sales order. Start

The app starts with a collapsed header area. Please expand it by clicking (*Expand Header*). Change the *Overall Status* to **All** and click Go. You can see different deliveries. Please note, it is possible that your screen may differ from the following screenshot. All

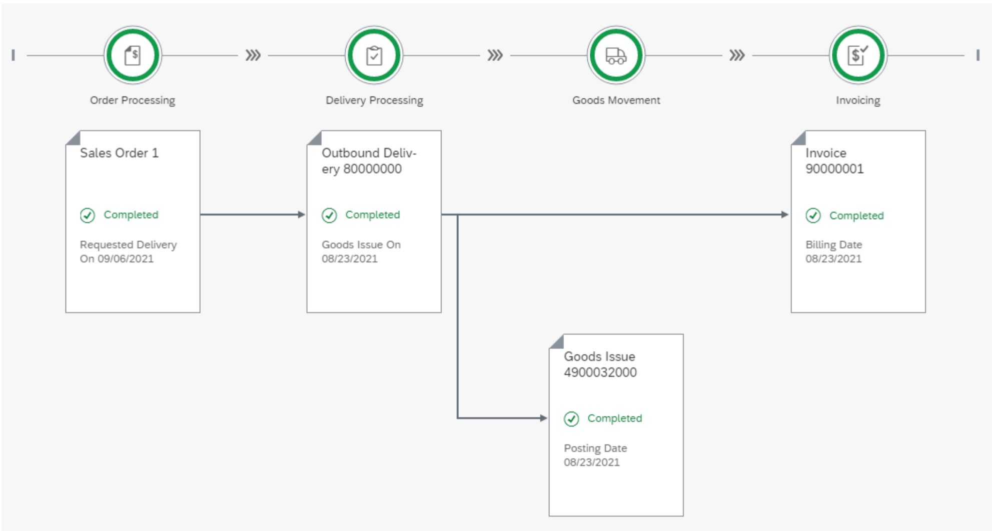


Select the line with the outbound delivery number **80000000** to view the document of the sales order introduced in the previous step. You can see the overall status ("Completed") and the delivery date. For more information, such as weight and picking status, see the *General Information* tab. 80000000 General Information



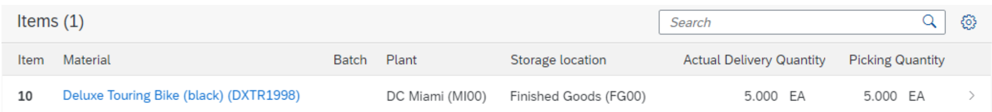
Scroll to the *Process Flow* section. There you can see all relevant documents, including the sales order of the previous step.

Process Flow

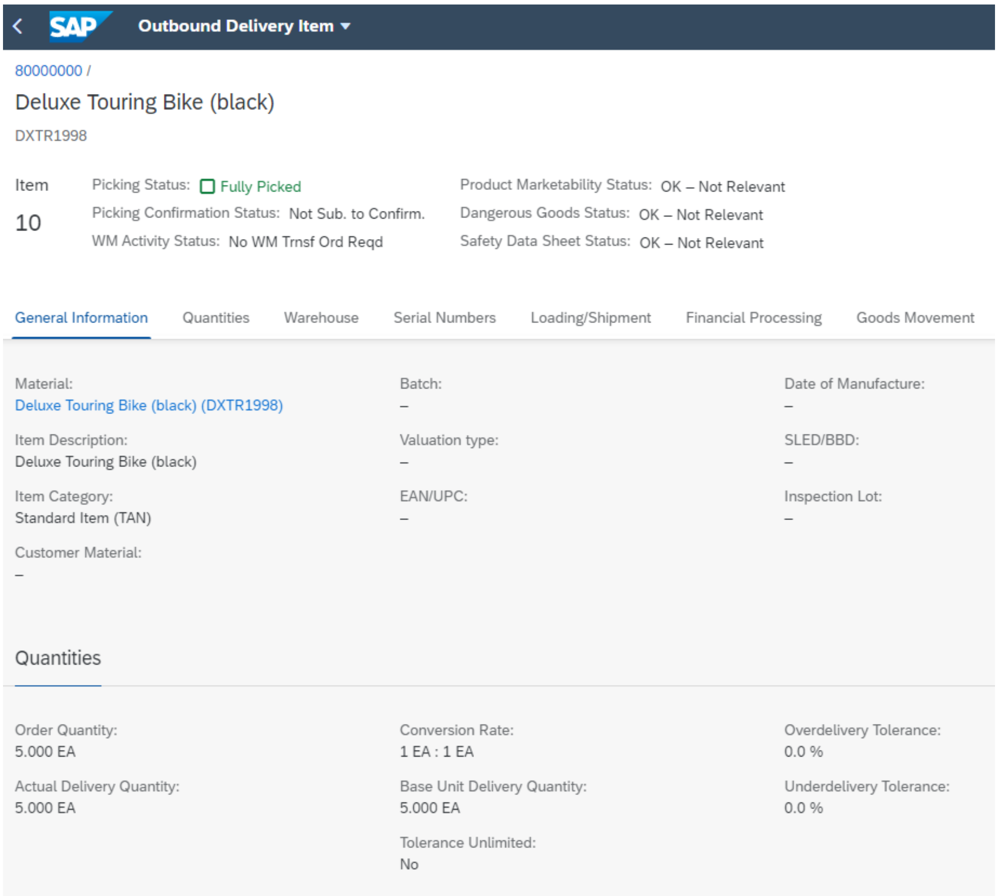


Afterward, please select the *Items* tab. Recognize the first line (Item 10) with the 5 ordered bicycles.

Items



Click the entry to get a more detailed view of the item.



Click on SAP to return to the SAP Fiori launchpad.

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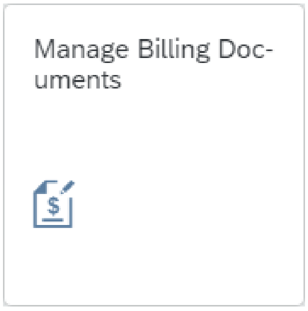
SD 4: Display Billing Document

Exercise Use the SAP Fiori Launchpad in order to display billing documents. **Time** 5 min

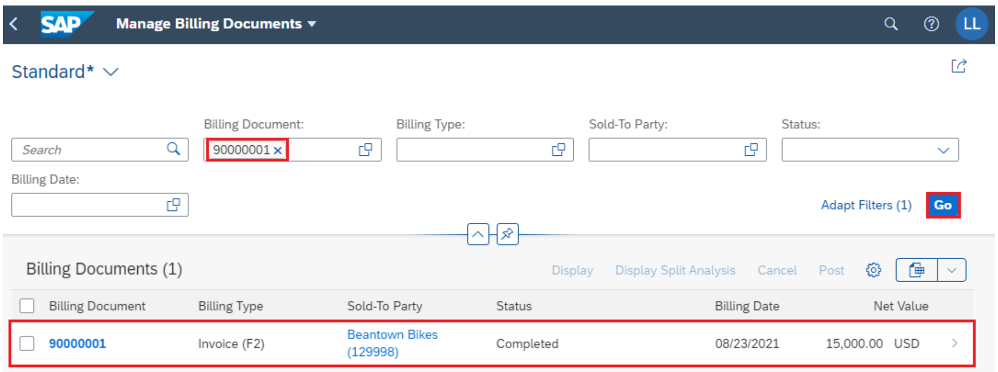
Task After the delivery of the bicycles to the customer, an invoice was created for the customer. Display the billing document in the system.

Name (Position) Stephanie Bernard (AR Accountant)

In the space *Sales and Distribution* and in the section *AR Accountant*, open the *Manage Billing Document* app to display a billing document. Start



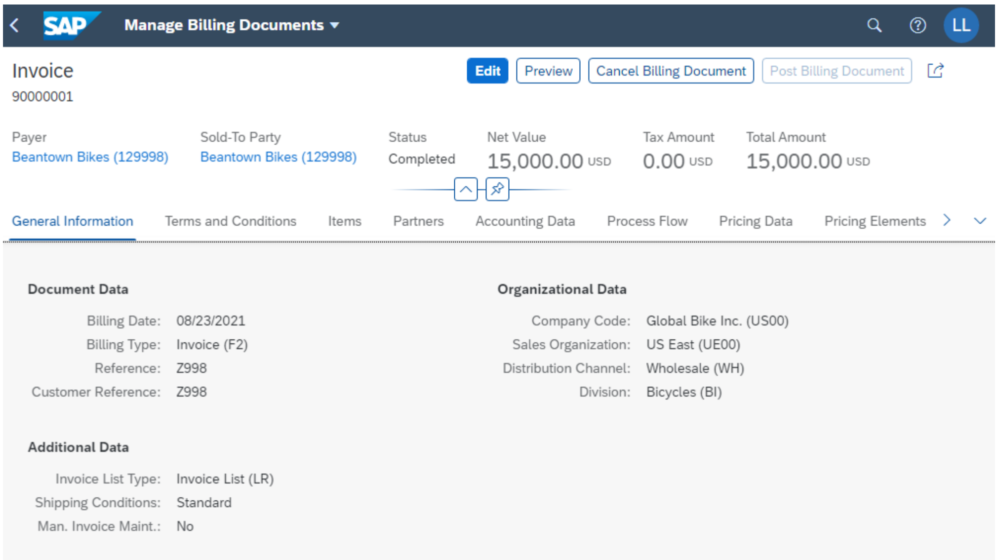
In the *Billing Document* field, enter **90000001** to display the billing document for the corresponding sales order. Select Go. 90000001



Note: If you see only one column in the display, e.g. Status, please exit the app by clicking on SAP and reopen it or click on ⚙ to show more columns using the settings.

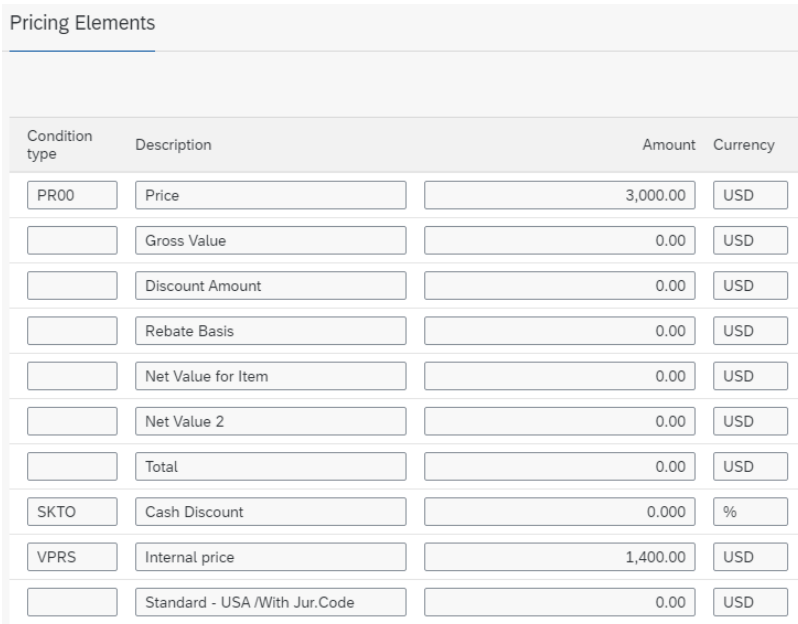
Afterward, click on the line with the billing document 90000001 to open the details.

You will be forwarded to your billing document. As you can see, this billing document represents a claim for payment of 15,000.00 USD for Beantown Bikes.



Pricing Elements

Select the *Pricing Elements* tab. You will see a list of all the items that are going into the net value, including the internal price of 1,400.00 USD per bike, which represents costs for Global Bike. At the top, there is the price of 3,000.00 USD, which includes the profit share. In addition to the individual amounts, all amounts are also calculated on the total quantity of the order.


Pricing Elements

Condition type	Description	Amount	Currency
PR00	Price	3,000.00	USD
	Gross Value	0.00	USD
	Discount Amount	0.00	USD
	Rebate Basis	0.00	USD
	Net Value for Item	0.00	USD
	Net Value 2	0.00	USD
	Total	0.00	USD
SKTO	Cash Discount	0.000	%
VPRS	Internal price	1,400.00	USD
	Standard - USA /With Jur.Code	0.00	USD

Click on SAP to return to the SAP Fiori launchpad.

SD 5: Analyze Document Flow

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

Task There are various possibilities to display the Document Flow. It is possible to open it directly from sales order document.

Name (Position) David Lopez (Sales Representative US East)

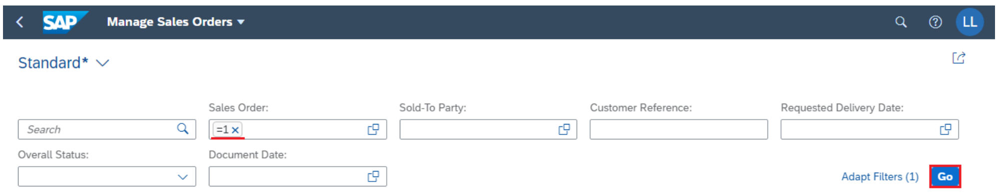
Document Flow

SAP provides a Document Flow tool that tracks the entire sales transaction process from beginning to end. The Document 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).

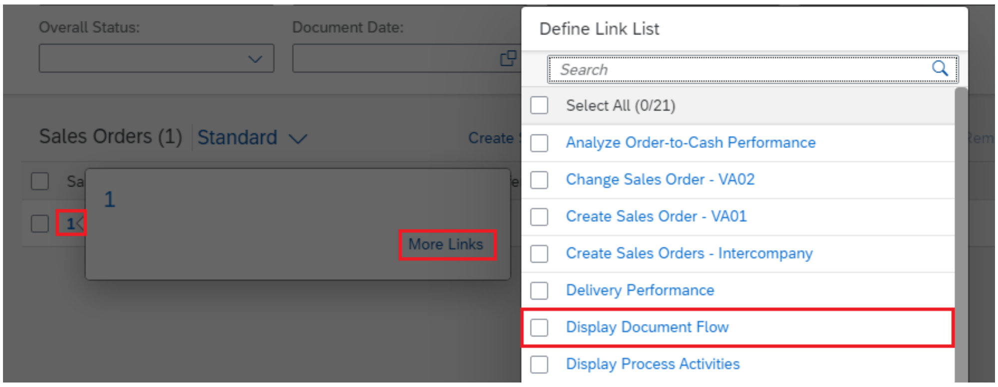
Start

In the space *Sales and Distribution* and in the section *Sales Representative*, use the *Manage Sales Orders* app to analyze the Document Flow.

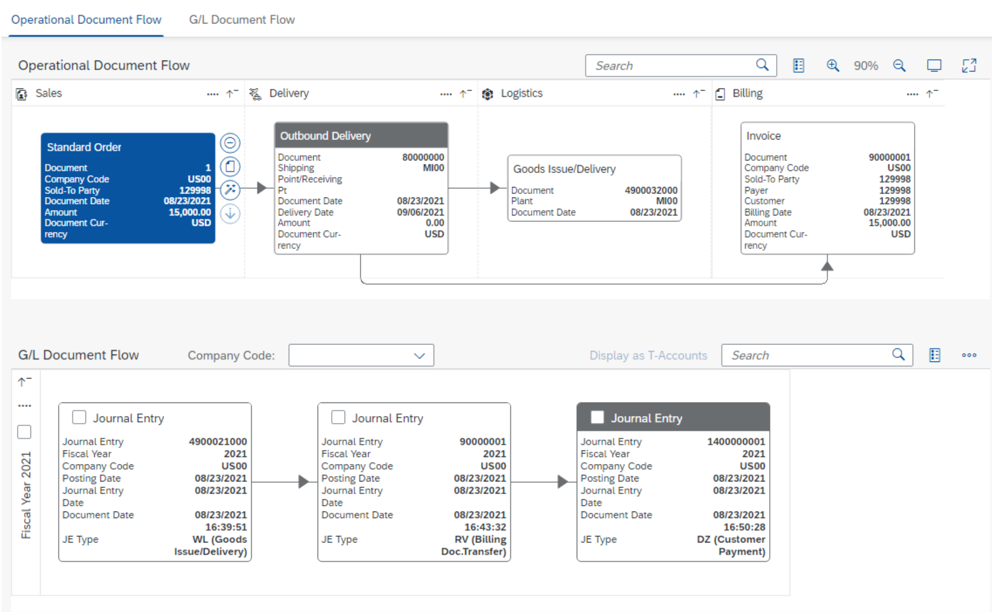
On the overview screen, in the *Sales document* field enter **1** and click Go. 1



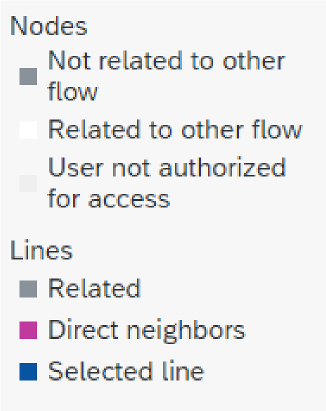
The sales order is displayed in the results list. Among other things, it can be seen that the order is already *Completed* (cf. *Overall Status*). Please do not switch to the detailed view (clicking on the line) but click directly on the order number within this line to open the context menu. There select More Links. In the *Define Link List* pop-up screen that opens, you can launch the *Display Document Flow* app. The following screenshot shows the clicking path. Display Document Flow



The *Display Document Flow* app opens and the sales document **1** is already preselected. Two document flows are displayed: One is the Operational Document Flow and the other is the G/L Document Flow. 1

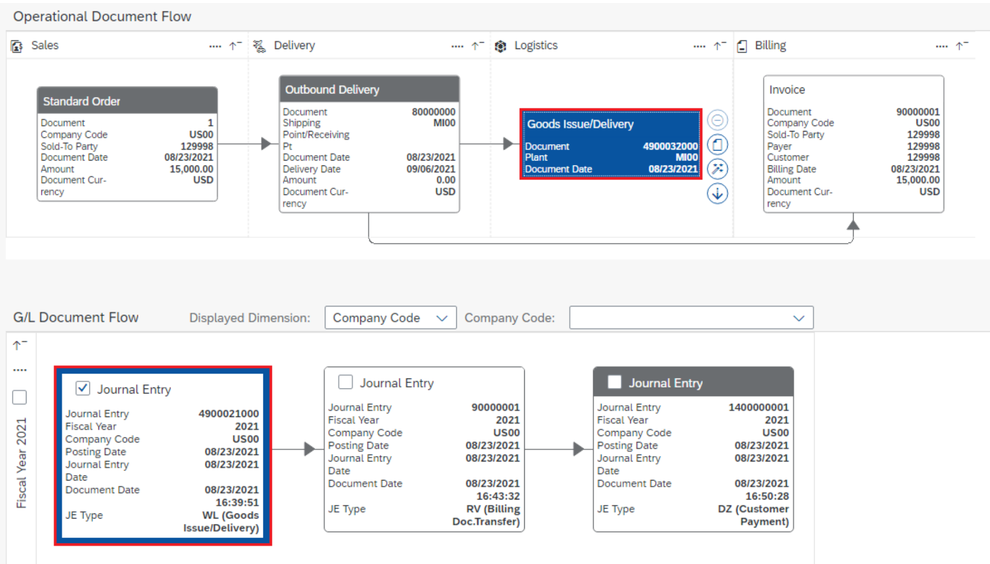


With the help of this document chain, complex relationships can be recognized. For a better overview, you have the possibility to expand/collapse groups, or to Zoom In/Out/Fit the view to the window size in the right screen area. By clicking , you can also fade in a legend.



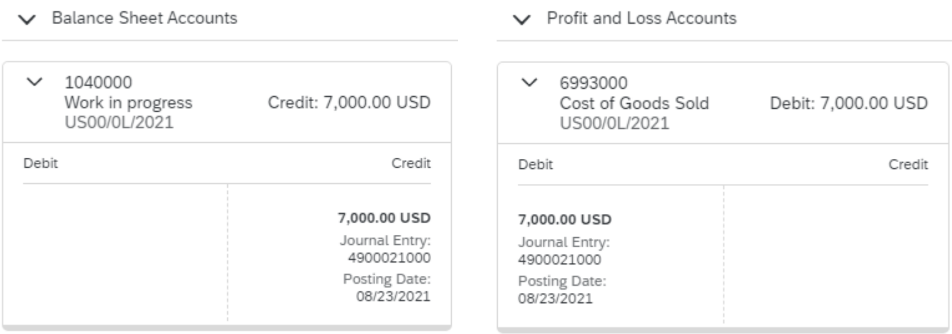
When you select a document from the Operational Document Flow, all G/L documents associated with it are also highlighted. For example, from the *Logistics* group, please select the **Goods Issue Document**. The following screenshot shows the result.

Goods Issue Document



The corresponding posting document from the general ledger is outlined in blue. Important information about the documents can be taken directly from the overview. You can use the settings in the right-hand screen area () to show or hide additional information about the general ledger documents.

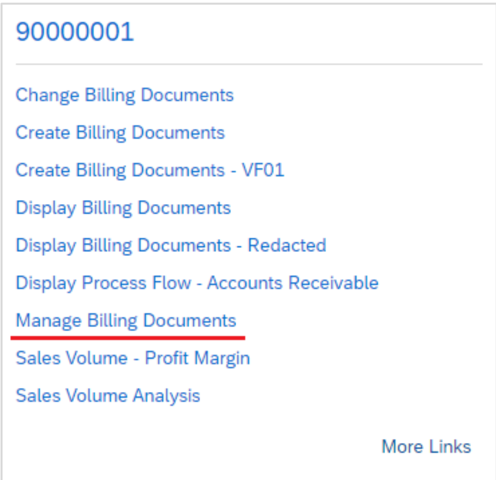
In addition, you can display the associated T-Accounts for one or more G/L documents. If the G/L documents are correctly marked, you can call up the desired view with the help of the Display as T-Accounts button.



On the *Display Journal Entries* screen, you can now view the accounting impact. As you may already know, the focus is on balance sheet accounts and profit and loss accounts. The T-Accounts visualize the posting principle “debit to credit”. After you had a look at the postings, select ‹ in the upper screen area to return to the document flow.

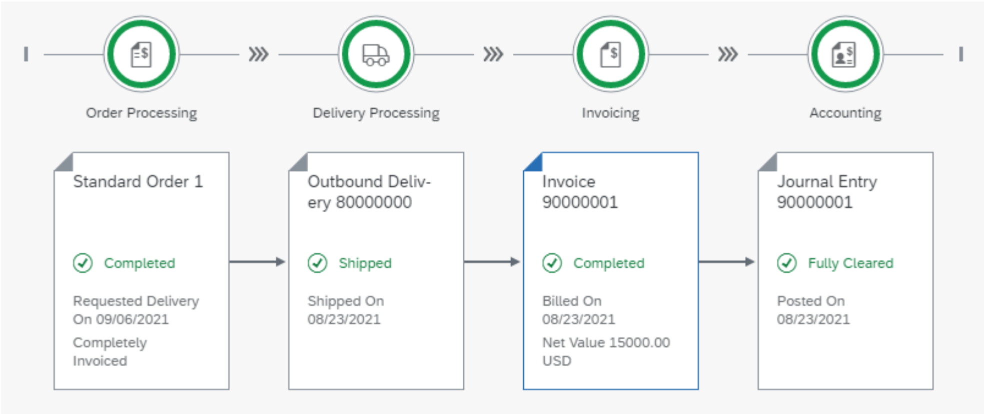
Manage Billing Documents

For more details, you can access any document from the document flow. For example, to view the invoice, select it and click the button (*Details*) that appears. The already familiar context menu will open. Select the *Manage Billing Documents* app.



Process Flow

On the *Manage Billing Documents* screen, you can see all details of the corresponding invoice. Finally, choose the *Process Flow* tab. There you will find an alternative document chain.



Click on SAP to return to the SAP Fiori launchpad.

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