

Sales and Distribution (SD)

This case study explains an integrated sales and distribution process in detail and thus fosters a thorough understanding of each process step and underlying SAP functionality.

Product

S/4HANA 1809 Global Bike

Fiori

Level

Beginner

Focus

Sales and Distribution

Authors

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Version

3.3

Last Update

May 2019

MOTIVATION

The data entry requirements in the sales & distribution exercises (SD 1 through SD 5) were minimized because much of the data was stored in the SAP system. This stored data, known as master data, simplifies the processing of business transactions.

In the sales order process, we used master data for customers, materials (the products we sold) and pricing to simplify the sales order process.

In this case study, we will create the master data for a new customer.

PREREQUISITES

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

In order to successfully work through this case study, it is not necessary to have finished the SD exercises (SD 1 through SD 5). However, it is recommended.

NOTES

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



Process Overview

Learning Objective Understand and perform an integrated order-to-cash cycle.

Time 120 min

Scenario In order to process a complete order-to-cash process you will take on different roles within the GBI company, e.g. sales agent, warehouse worker, accounting clerk. Overall, you will be working in the Sales and Distribution (SD), the Materials Management (MM) and the Financial Accounting (FI) departments.

Employees involved David Lopez (East Rep. Miami)

Maria Diaz (Sales Person 1)

Matthias Dosch (Sales Person 2)

Sandeep Das (Warehouse Supervisor)

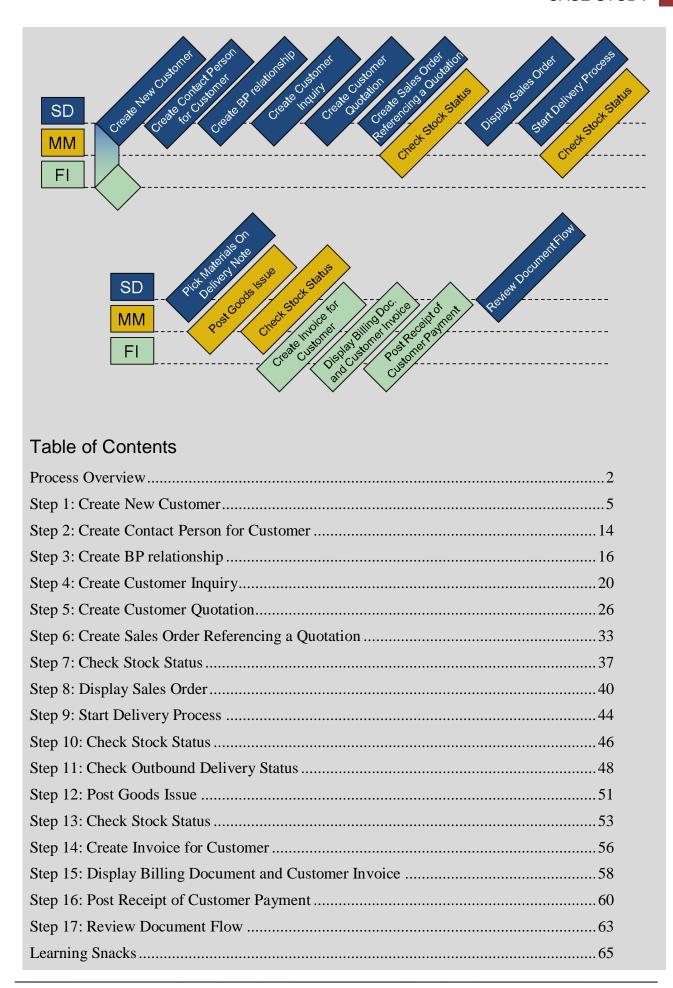
Sergey Petrov (Warehouse Employee)

Stephanie Bernard (Billing Clerk)

Jamie Shamblin (Cost Accountant)

You start the sales order process by creating a new business partner (BP) with the role customer (The Bike Zone) in Orlando. Then, you receive an inquiry which you will process into a quotation. Once the quotation is accepted by the customer you create a sales order referencing the quotation. As you will have enough bikes in stock, you deliver the products sold to your customer, create an invoice and receive the payment.

The graphic below displays the complete process (17 tasks).



SD	Challenge	.6	/
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Step 1: Create New Customer

Task Create a new customer.

Time 15 min

Short Description Use the SAP Fiori Launchpad to create a new customer.

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

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, use the app *Maintain Business Partner*.

Fiori App



In the Maintain Business Partner screen choose Organization

Note: The business partner is created superordinate and assigned roles (for example customer, vendor). The different roles are created at specific organizational levels (company code, sales area).

Business partners can be categorized as a person, group, or organization, as follows:

- An organization represents units, such as a company (for example, a legal person), parts of a legal entity (for example, a department) or an association. Organization is an umbrella term to map every kind of situation in the day-to-day business activities.
- A group represents a shared living arrangement, a married couple, or an executive board.

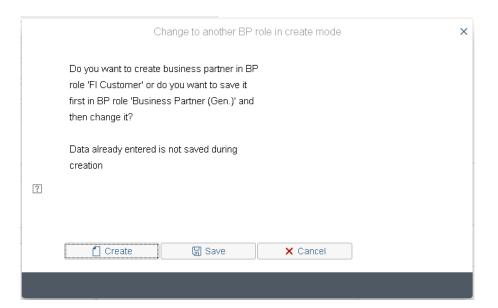
Organization

In the *Create Organization* screen select in the drop-down menu for Create in BP role the Business Partner **FI Customer**. In the pop-up *Change to another*

Create

FI Customer

BP role in create mode choose

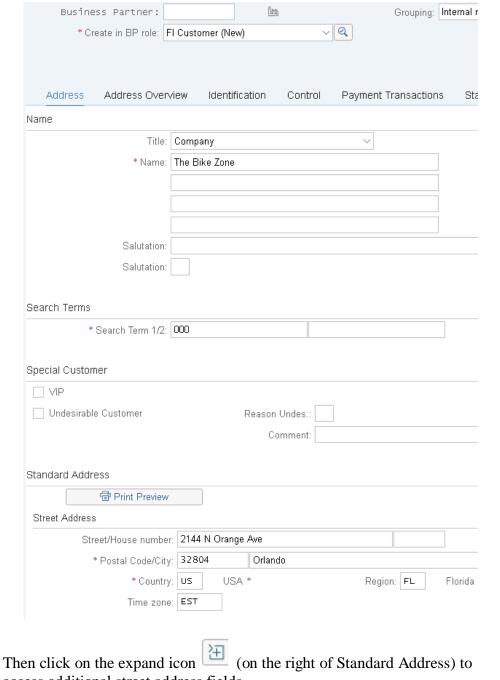


In the *Create Organization: Role FI Customer* screen make sure, that for the field Create in BP Role **FI Customer** (**New**) is selected.

Enter Company for Title, The Bike Zone for Name and your number (###) for Search Term. Further enter 2144 N Orange Ave for Street, 32804 for Postal Code, Orlando for City, US for Country and FL for Region.

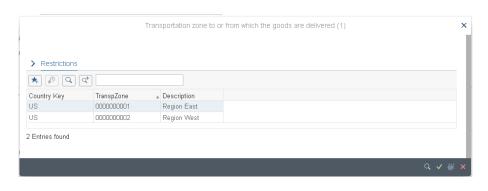
Select English for Language.

Company The Bike Zone ### 2144 N Orange Ave 32804 Orlando US, FL English



access additional street address fields.

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.



Double-click on Region East to select it.

* Country:	US	Region: FL
Time zone:	EST	Tax Juris.:
Transportation Zone:	000000001	
Structure Group:		
Undeliverable:		V

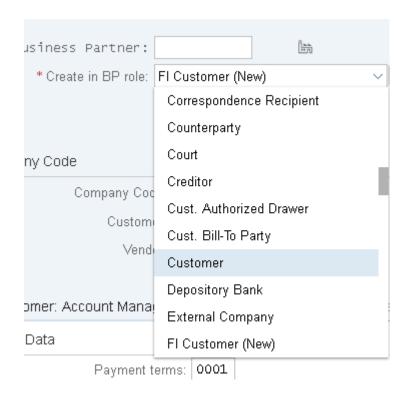
Note: In the general role of the business partner (BP), the business partner name and address is entered. The general role data is relevant for sales and distribution and for accounting. To avoid data redundancy, it is stored centrally (client-specific). It is valid for all organizational units within a client.

Clicking on Company Code will produce the following screen. There Enter **US00** for Company Code and confirm with Enter.

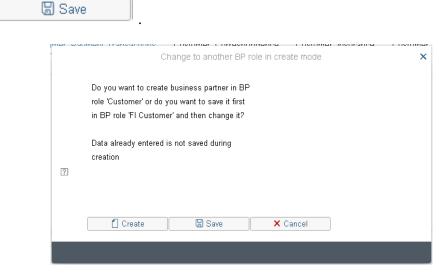
Note: Depending on the size of your browser window, you may not see the company code. In this case you will find it under **More** ► **Company code** or press Ctrl + F2.

Region East

	Business Partner:				
	* Create in BP role:	FI Customer (New)	~	Q	
	Company Code				
	Company Code):			
	Custome	re re re Internal>			
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	Release G	roup:			
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	he tab <i>Customer: Account M</i> t. and 001 for Sort key.	<i>Management</i> ente	r 110000 for Red	conciliation	110000 001
	Customer: Account Manage	ment Customer	: Payment Transact	ions (
	Account Management				
	* Reconciliation a	cct: 110000	Trade Accounts re	eceivables	
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Pay	en click on the tab <i>Custome</i> ment Terms. Confirm with F	Enter.			0001
In t	he drop down menu on the to	op Create in BP r	ole choose Custo	mer.	



In the pop-up Change to another BP role in create mode choose

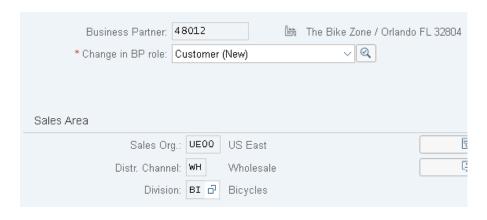


You will receive the message, that you created a Business partner. Now you want to add additional information in the BP role Customer.



Click on Sales and Distribution and enter **UE00** for Sales Org., **WH** for Distr. Channel and **BI** for Division. Confirm with Enter.

UE00 WH BI



Enter US0003 for Sales District, USD as Currency, 01 for Price Group and 1 for Customer Stats.Group.

US0003
USE
01
1

Orders	Shipping	Billing	Documents	Partner Functions	Additional Data	Status	Customer: Texts
rder							
	Sales	District:* US	0003	Southeast USA			
	Custome	r Group:					
	Sale	s Office:					
	Sale	s Group:					
	Authorization	n Group:					
	Ассоилt at ci	ustomer:					
	Order Pro	obability: 10	0 %				
	Item p	roposal:					
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	Unit of Meas	ure Grp:					
	PP customer	proced.:					
	Cu	irrency:* US	D	United States Dollar			
	Exchange Ra	ite Type:					
Product	Attributes						
Pricing/Statist	tics						
	Price	Group:* 01		Bulk buyer			
	Cust.Pric.Pro	cedure;* 1		Standard			
	Р	rice List:					

Then click on the tab Shipping. Enter **02** for Delivery Priority, **01** for Shipping Conditions, **MI00** for Delivering Plant and **3** for Max.Part.Deliveries.

Check with the screen below.

Orde	rs	Shipping	Billing	Documents	Partne	r Functions
hipping						
		Delive	ry Priority:	2	Normal	item
		Order Cor	nbination:	~		
		Delive	ring Plant:	MIOO	DC Miai	mi
		Shipping C	onditions:	01	Standar	d
		POD	-Relevant:			
		POD T	imeframe:			
artial De	eliverie	es				
		Complete	e Delivery:			
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FOB Miami 0001 01 0

to save your new customer data. The SAP-System creates a unique customer number. Changes have been saved Choose again FI Customer (defined) in the drop-down menu Change in BP FI Customer (defined) Company Code role. If necessary, choose the button Note: You have created a customer with a unique number. And for this customer you have also created a unique Business partner number. With the Business partner number, you can assign your customer more roles. Business partner Business Partner: 48012 🔚 The Bike Zone / Orlando FL 32804 number: VQ * Change in BP role: FI Customer (defined) Customer number: Company Code Company Code: US00 Global Bike Inc. Customer: 25005 Vendor: to return to the Fiori Launchpad overview. Click on the home icon



Step 2: Create Contact Person for Customer

Task Create a contact person for a customer.

Time 10 min

Short Description Use the SAP Fiori Launchpad to create a contact person.

Name (Position) Maria Diaz (Sales Person 1)

Now that we have created the master data for our new customer, **The Bike Zone**, we can create the master data for a contact person. A contact person is an employee/representative of the new customer's company. The contact person defines a specific person to communicate with when dealing with The Bike Zone.

To create a contact person, use again the app Maintain Business Partner.

Fiori App



In the Create Business Partner screen choose Person.

up Change to another BP role in create mode choose

Person

Contact Person

In the drop down menu Create in BP role choose Contact Person. In the pop-

Croat.

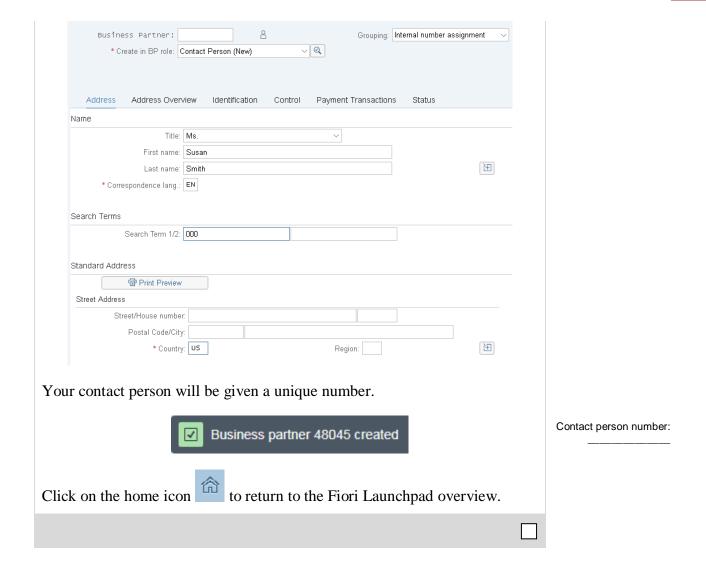


Enter a Title, first name and last name of your choice. Enter ### as Search Term. Further enter **EN** for Correspondence lang. and **US** for country.

Check with the screen below and click on the button



Title First name Last name ### EN US





Step 3: Create BP relationship

Task Create BP relationship.

Time 5 min

Short Description Use the SAP Fiori Launchpad to create a Busines Partner relationship.

Name (Position) Maria Diaz (Sales Person 1)

The contact person created for The Bike Zone needs to be assigned as a business partner within the customer master.

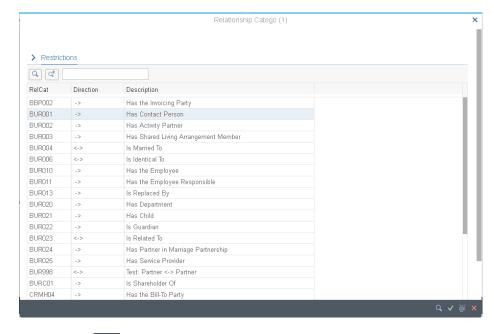
To assign your new customer with the contact person you created in the step before, use the app *Create BP relationship*.

Fiori App



In the field Relationship Category use the **F4** help. Select there **Has Contact Person**.

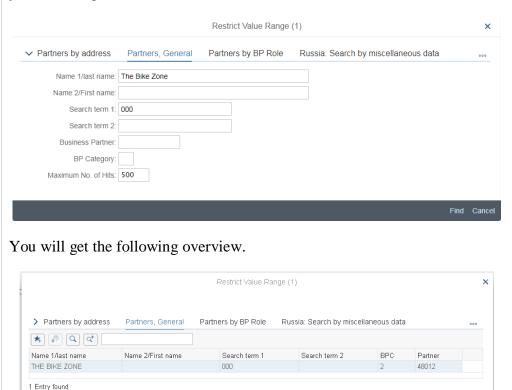
F4 Has Contact Person



Confirm with

In the field Business Partner 1 search for your Customer you created in the first step. Use therefore the **F4 help**. Navigate to the *Partner*, *General* tab. Enter for Name1/last name **The Bike Zone** and in the Search term 1 field your three digital numbers ### and confirm with Enter or Find.

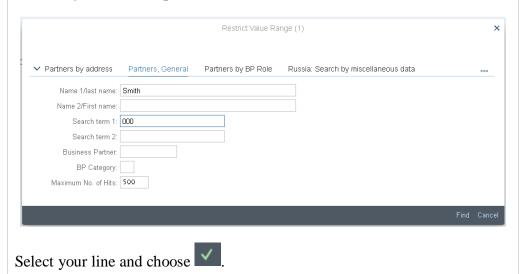
F4
The Bike Zone



Select your entry and confirm with .

Back in the *Create BP relationship: Initial screen* choose again the **F4 help** in the field Business partner 2.

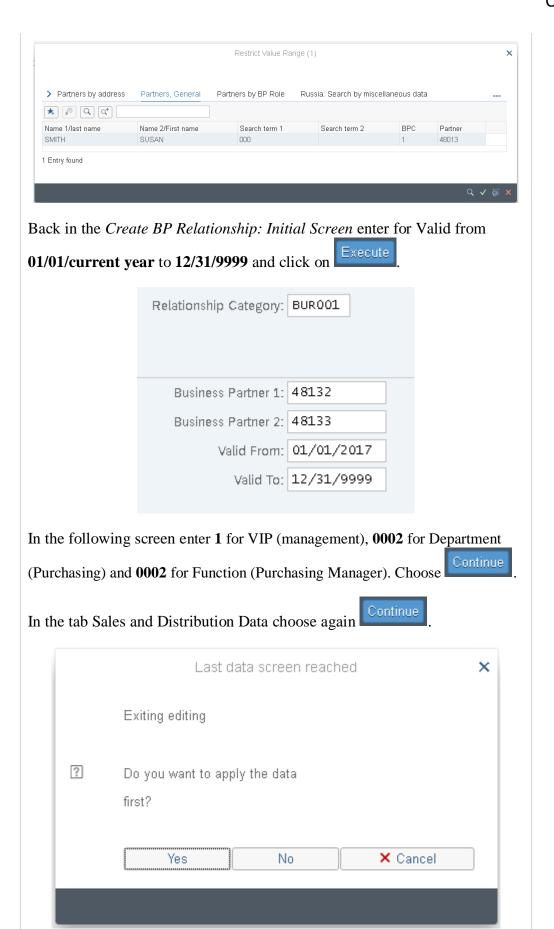
In the tab Partners, General enter your **three digital numbers** and the **last name of your contact person**. Choose Find



Last name contact person

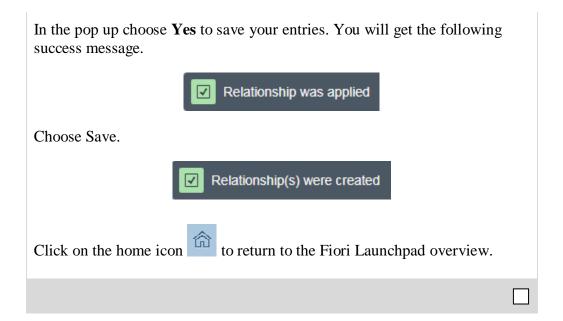
© SAP UCC Magdeburg Page 17

F4



01/01/current year 12/31/9999

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Step 4: Create Customer Inquiry

Task Create a customer inquiry.

Short Description Use the SAP Launchpad to create a customer inquiry.

Name (Position) Matthias Dosch (Sales Person 2)

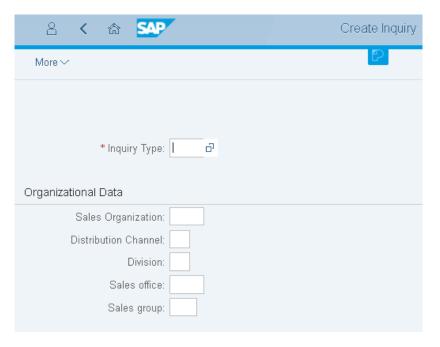
Now we will enter an inquiry from our new customer, The Bike Zone. An inquiry is a customer's request to be provided with sales information without obligation. An inquiry can relate to materials or services, conditions, and if necessary delivery dates.

To create an inquiry, use the app Create Inquiry.

Fiori App

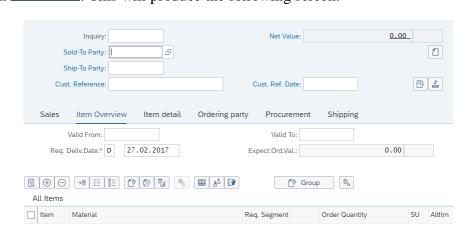
Create Inquiry

This will produce the following screen.



Enter the following information: **IN** for Inquiry Type, **UE00** for Sales Organization, **WH** for Distribution Channel and **BI** for Division. Then click on Continue. This will produce the following screen.

IN UE00 WH BI

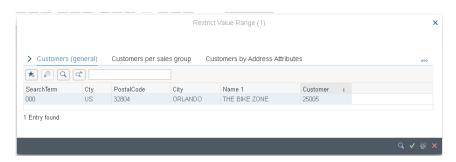


Click on the Sold-To Party field, then click on the search icon ____, which will bring up the following search screen.

	Restrict Value Range (1)			>
✓ Customers (general)	Customers per sales group	Customers by Address Attributes		
		Castomers by Address Attributes	000	_
Search term:	I.			
Country:				
Postal Code:				
City:				
Name:				
Customer:				
Maximum No. of Hits:	500			
			Find Car	n

Because you have defined a search term when we created our new customer, we can now use it to find your The Bike Zone.

Click on the Customers (general) tab, enter ### for search term and **Orlando** for City. Then, click on Find. This will produce the new customer.



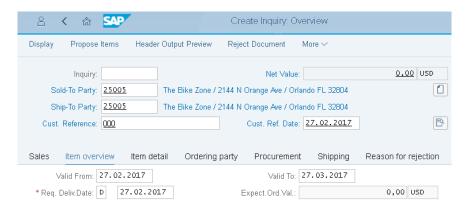
Double-click on The Bike Zone to select it. Fill in the same number for the Ship-To Party.

Enter ### for Cust. Reference, **today's date** for the Customer Reference Date (F4, then Enter), **today's date** for the Valid from date (F4, then Enter)

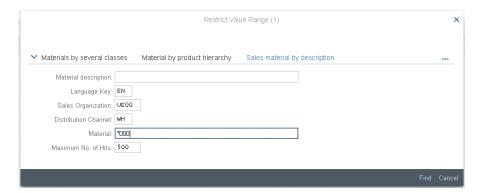
Orlando

today's date one month from today

and a date **one month from today** for the Valid to date (F4, then select the date).



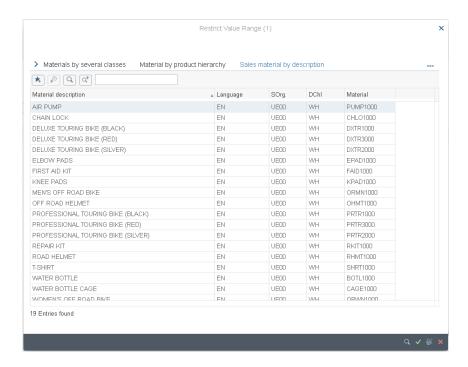
The Bike Zone wants prices on two products – the Deluxe Touring Bike (black) and the Professional Touring Bike (black). To find these products, we need to use the search function. Click on the material field in the first



On the Sales material by description tab, enter Sales Organization **UE00**, Distribution Channel **WH** and Material *### (e.g. *005 if your number is

005). Then click on Find to get the list of bicycles.

UE00 WH *###



Double-click on the **Deluxe Touring Bike (black)** to select it and enter an order quantity of **5** pieces.



Repeat the process to enter a quantity of **2** of the **Professional Touring Bike** (**black**). Choose Enter to determine the price for this order.

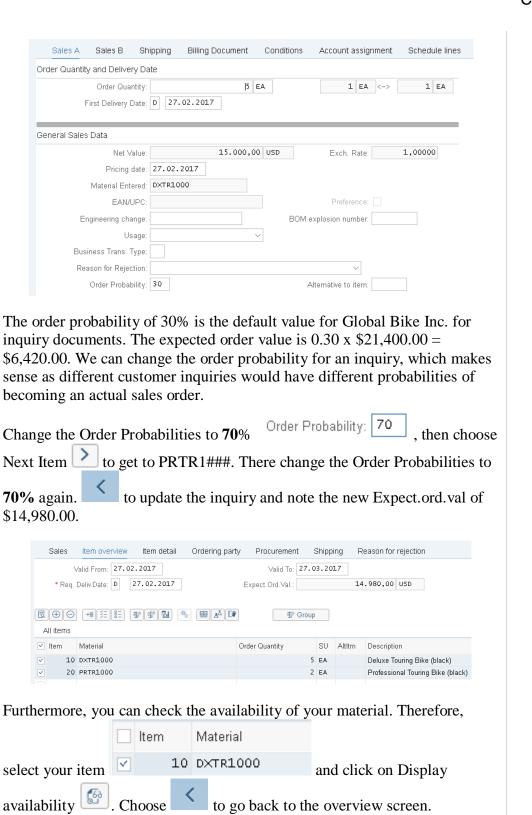


The total price for these 7 bikes to The Bike Zone is \$21,400.00, which is given by the net value. The Expected Order Value (\$6,420.00) is a calculated value which takes the net value of the order and multiplies it by the probability of having an inquiry from this customer turn into an actual order.

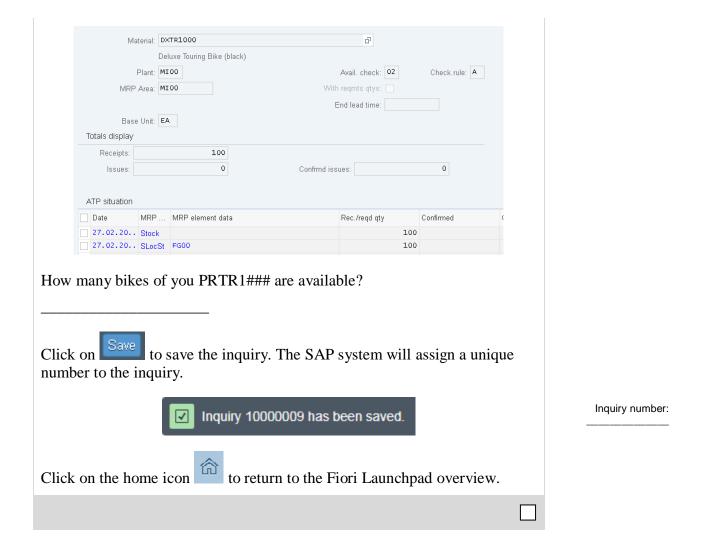
Select both items and choose Item conditions. There choose the tab *Sales A*.

DXTR1### 5

PRTR1###



70





Step 5: Create Customer Quotation

Task Create a customer quotation.

Time 10 min

Short Description Use the SAP Launchpad to create a customer quotation.

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

An inquiry presents the terms (price, delivery schedule) to a customer considering a purchase. A quotation is similar, except that it is a legally binding offer for delivering the requested product or services.

The Bike Zone would like a firm quote for the items in the inquiry created before. We can do this easily by copying the details from the inquiry into the new quotation.

Fiori App

To do this, use the app Manage Sales Quotations.

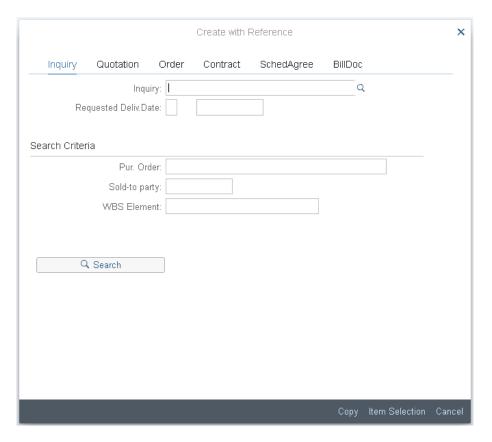


Click on Create Quotation .

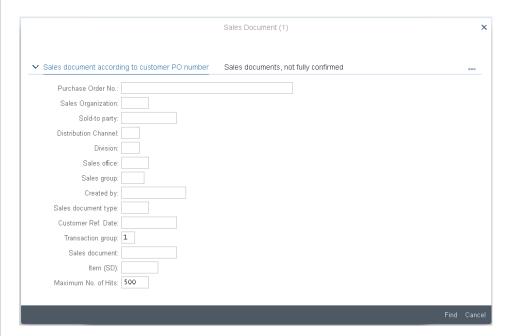
Enter **QT** for Quotation Type, then click on Create with Reference Create with Reference.

This will produce the following screen.

QΤ

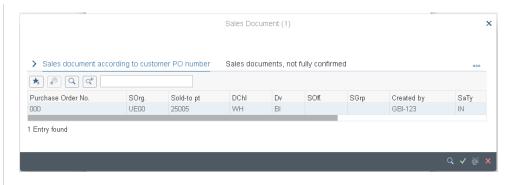


Make sure the *Inquiry* tab is selected, click on the *Inquiry* field, then on the search icon $^{\mathbb{Q}}$. This will produce the following search window.

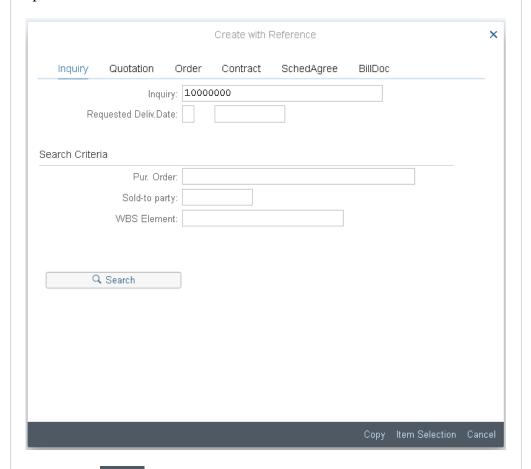


In the *Sales document according to customer PO number* tab, enter your Purchase Order No. (###), then click on Find. This will produce a list with the inquiry for The Bike Zone.

###



Double-click on the inquiry to select it, and the inquiry number will be copied in the Create with Reference window.



Click on the Copy button to copy information from the inquiry into the quotation screen.

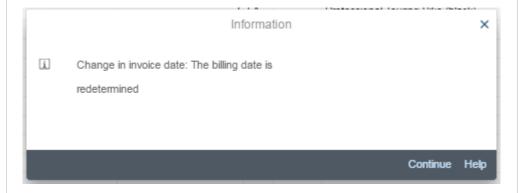


Enter ### as Customer Reference number again, **today's date** for the Customer Ref. Date, a date **one month from today** for the Valid to date, and a date **one month from today** for the Required Delivery date. Then choose Enter, which will produce the following warning.

today's date one month from today one month from today



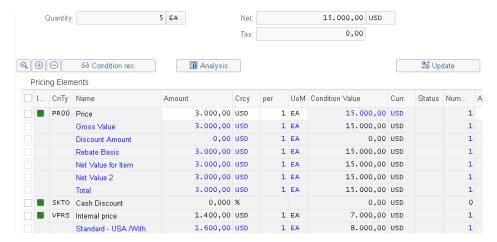
If the warning shows up in a pop up close the warning message. Again, choose Enter. This will produce an information message.



Click on Continue to acknowledge this information.

To encourage The Bike Zone to become a loyal customer, you have been authorized to give a \$50.00 discount on each Deluxe Touring bike, as well as a 5% discount on the entire order.

To add the \$50.00, select the Deluxe Touring bike line in the order, then click on the Item conditions icon . You will get a screen that shows the pricing details for your Deluxe Touring Bike.



Note: The condition master data includes prices, surcharges, and discounts, freights, and taxes. You can define condition master data (condition records) to be dependent on various data. You can, for example, maintain a material price customer-specifically. In SAP, pricing is done using conditions. The pricing procedure defines which condition types are to be used to calculate the final price. Condition type PR00 is a gross price condition.

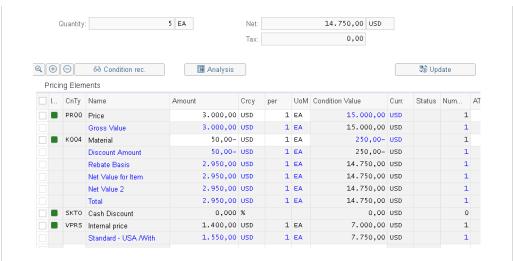
To add a discount, we can add condition type K004 (material discount) with an amount of 50 to the pricing procedure.

Pricina	Elements
i nong	LICITIONES

l	CnTy	Name	Amount	Crcy
	PR00	Price	3.000,00	USD
		Gross Value	3.000,00	USD
		Discount Amount	0,00	USD
		Rebate Basis	3.000,00	USD
		Net Value for Item	3.000,00	USD
		Net Value 2	3.000,00	USD
		Total	3.000,00	USD
	SKTO	Cash Discount	0,000	%
	VPRS	Internal price	1.400,00	USD
		Standard - USA /With	1.600,00	USD
	К004		50	

After confirming with Enter, a new price for the 5 Deluxe Touring bikes will be calculated.

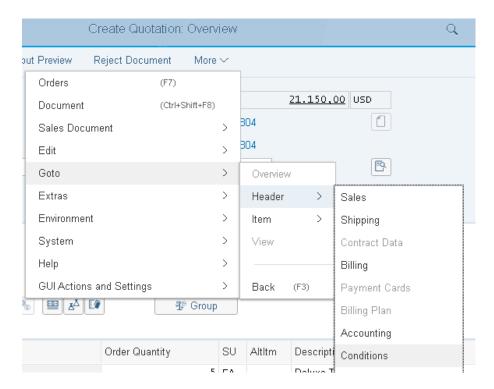
K004 50



Note that the discount is now applied to the order. Click on the back icon to return to the main quotation screen.

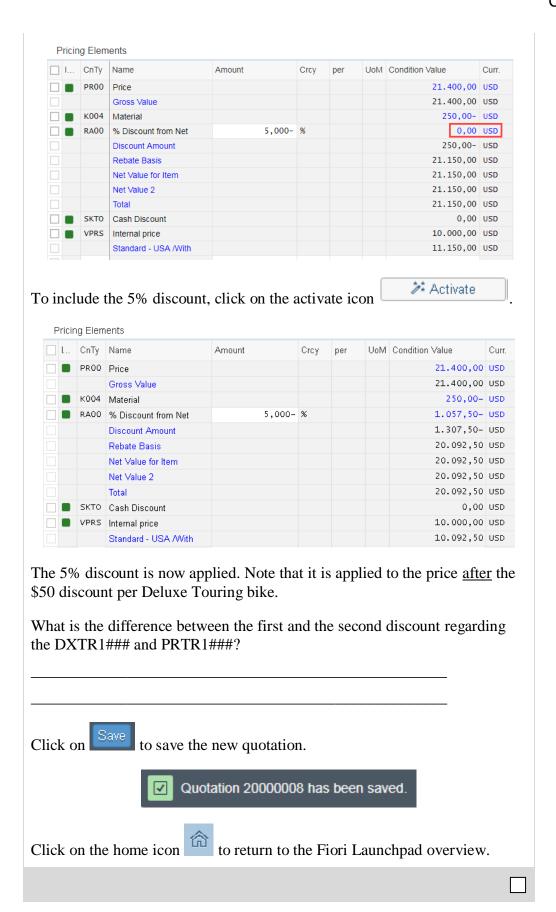
To apply a 5% discount to the entire order, follow the pull-down menu path:

More ▶ Go to ▶ Header ▶ Conditions



To apply the 5% discount, enter CnTy (condition type) **RA00** (Net Discount) with an amount of **5**, then choose Enter. Note that the price does not yet include the 5% discount.

RA00 5





Step 6: Create Sales Order Referencing a Quotation

Task Create a sales order with reference to a quotation.

Time 10 min

Short Description Use the SAP Fiori Launchpad to create a sales order.

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

The Bike Zone has agreed to the terms and conditions in the quotation and wants to order the bikes in the quotation. As a result, we can simplify the order creation process by copying the quotation into a sales order.

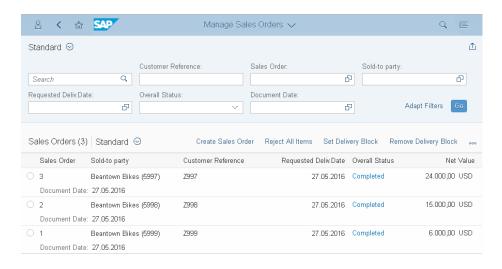
To create a sales order, use the app Manage Sales Order.

Fiori App

The app Manage Sales Order is a dynamic app. In this case, the app shows a 3. That means that GBI has three different sales orders. The number you see depends on the tasks you and your class have created previously.



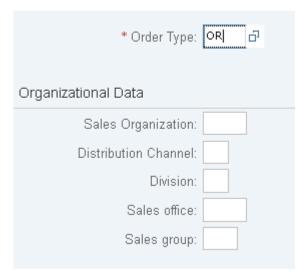
In the screen *Manage Sales Orders* you can display all Sales Orders from Global Bike. Therefore, just choose Go.



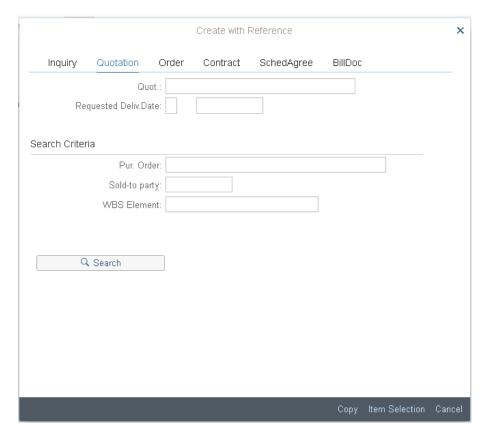
We want to create a new sales order. Therefore, click on the button

Create Sales Order

Enter Order Type **OR**. The other fields do not necessarily need to be filled.



Then, click on the Create with Reference icon. This will produce the following pop-up search window.



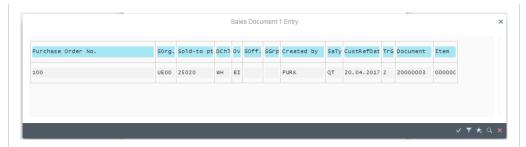
Make sure that the *Quotation* tab is selected, click on the Quotation field, then on the search icon $^{\mathbb{Q}}$.

On the following search window, make sure you select the *Sales document according to customer PO number* tab, enter ### for Purchase Order Number, then click on Continue.

###

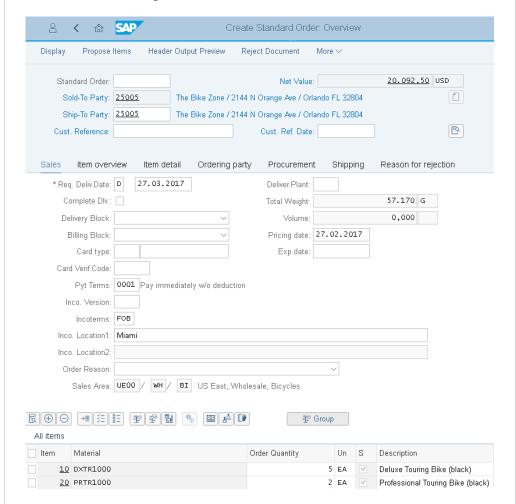
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OR



After double-clicking on the quotation, the number for the quotation will be entered into the Create with Reference window.

With the Quotation number entered, click on the Copy icon to copy the information from the quotation into the sales order screen.

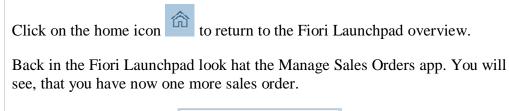


Enter ### for Cust. Reference and **today's date** (F4, then Enter) for the Cust. Ref.Date. Note that the Req.deliv.date is copied from the quotation. Click on to save the sales order. The SAP system will assign a sales order

Standard Order 28 has been saved.

number.

today's date







Step 7: Check Stock Status

Task Check the inventory.

Time 5 min

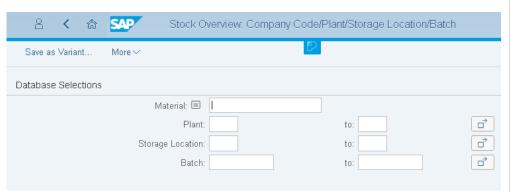
Short Description Use the SAP Launchpad to check the stock status.

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

We can check on the inventory level of the bikes in the sales order for The Bike Zone. To do this, use the app *Display Stock Overview*.



Fiori App

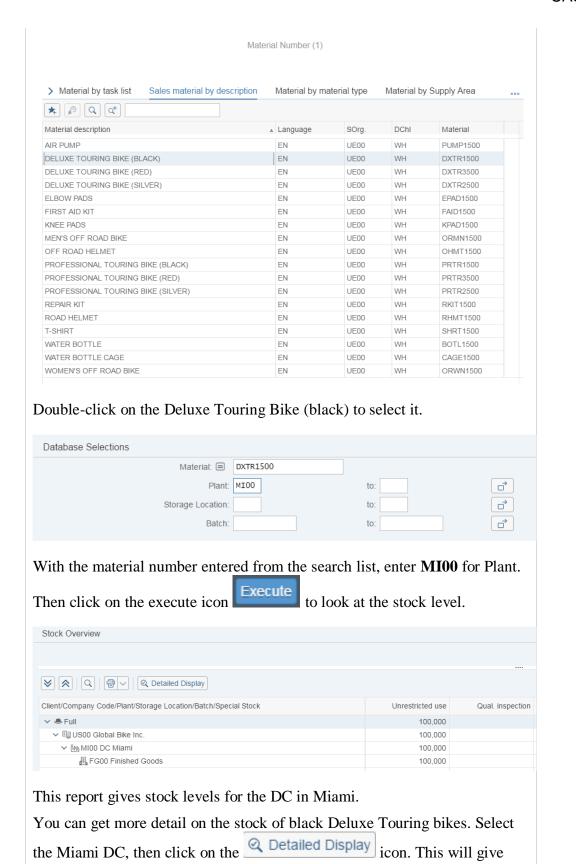


To find the material number for your bikes, click on the Material field, then click on the search icon \bigcirc .

Select the tab Sales material by description. Enter **UE00** for Sales Organization, **WH** for Distribution Channel and Material *### (e.g. *002 if your number is 002). Then click the enter icon find the list of materials.

UE00 WH *###

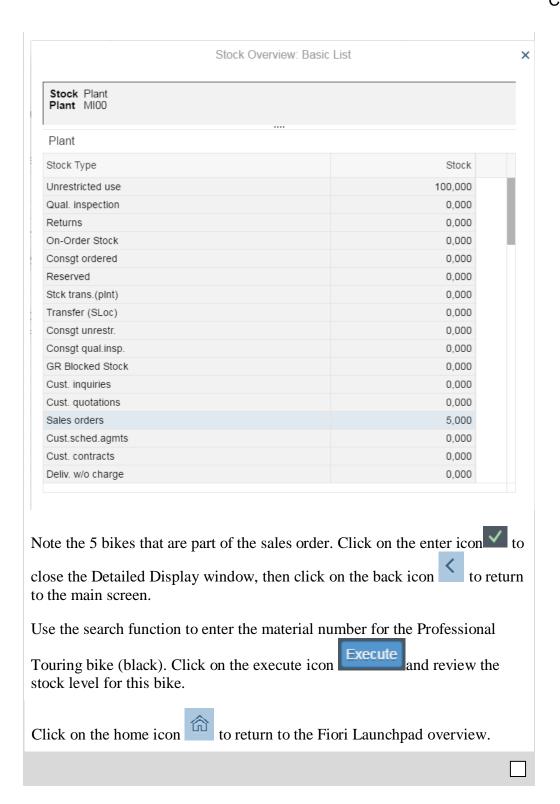
MI00



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you very specific information about the inventory of black Deluxe Touring

bikes.





Step 8: Display Sales Order

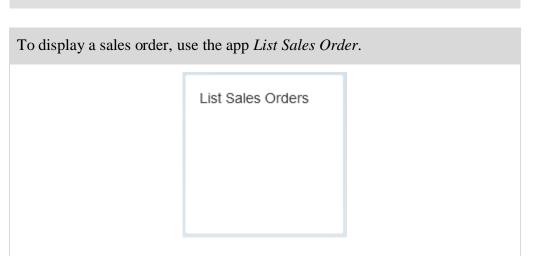
Task Display a sales order.

Time 10 min

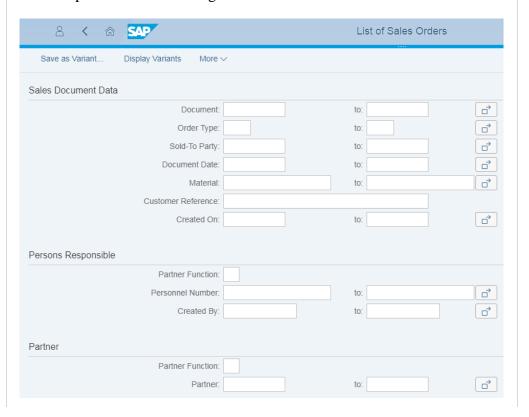
Short Description Use the SAP Launchpad to display a sales order.

Name (Position) Sandeep Das (Warehouse Supervisor)

With relatively little user input, the sales order for The Bike Zone has been created. The Display Sales Order transaction provides the opportunity to review the order in detail.



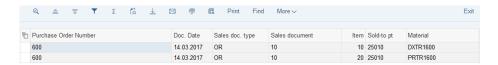
This will produce the following screen.



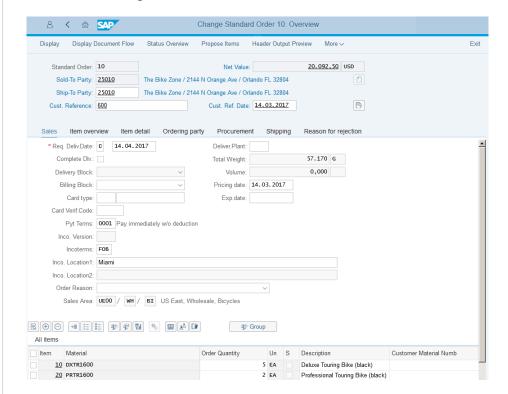
Fiori App

Customer number

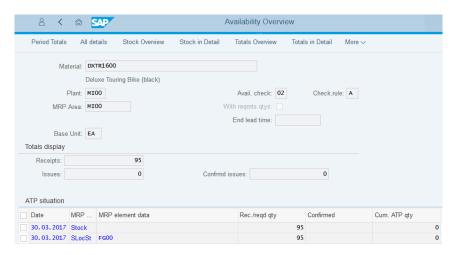
In the field Sold-To Party use the F4-Help to find your Customer and enter ### in the field Customer Reference. Afterwards click on Execute.



After double-clicking on your sales order number (Sales document column), this view should be produced.

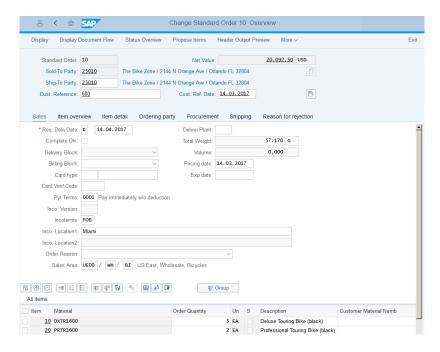


Select the Professional Touring bike line item, then click on the display availability icon to explore the stock for this item in detail.

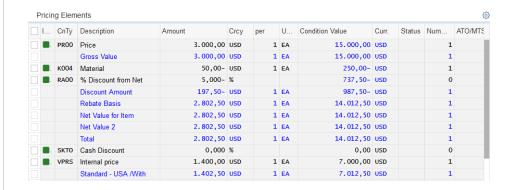


This screen shows how many bikes we have in stock and the order we are displaying will use 2 of these.

Note Your numbers may be different. Choosing **More** → **Scope of check** will produce the following window. Display Scope of Check Availability Check: 02 Individ.requirements Checking Rule: A SD order ☐ With Quality Inspection Stock With Stock Transport Reqts: Exclude ☐ With Restricted-Use Stock ☐ With Dependent Requirements With Dependent Reservations: Exclude Replenishment Lead Time With Purchase Orders: X Include (for STO, use order quantity) Special Scenarios With Planned Orders: Exclude With Production Orders: Exclude Without Subcontracting Missing Parts Processing Delayed Supply Checking Period: Goods Receipt: 0 This screen displays the elements considered when performing the availability check. For example, Incl. purchase orders is selected, which means that a purchase order will be considered as available stock from its receipt date onward. then click on the back icon Click on screen.



After selecting the Deluxe Touring bike line and clicking on the item conditions icon , the following screen will be displayed.



The details of the price calculation for the Deluxe Touring bike are displayed. Note the two discounts that were manually applied to this line item.

What is the Internal price of your bike DXTR1####?

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



Step 9: Start Delivery Process

Task Start the delivery process.

Time 5 min

Short Description Use the SAP Launchpad to start the delivery process.

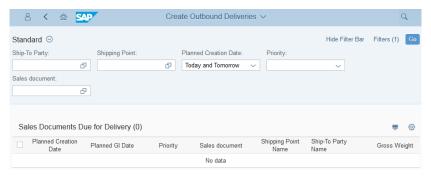
Name (Position) Sergey Petrov (Warehouse Employee)

To start the process that will fulfill The Bike Zone's order, we need to create a delivery document. To do this, use the app *Create Outbound Deliveries*.

Fiori App



This will produce the following screen.



Note: You trigger shipping activities by creating deliveries. The responsible organizational unit for creating deliveries is the shipping point. The shipping point can be a loading ramp, a mail depot, or a rail depot. It can also be, for example, a group of employees responsible (only) for organizing urgent deliveries.

Use the F4 help in the field *Ship-To Party*

Enter **Orlando** in City field, US in Country field and choose on . Scroll down until you find your customer. Select your customer The Bike Zone

with the right customer number and click on



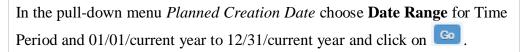
 Items

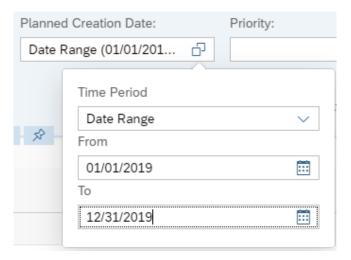
 Cou...
 Postal Code
 City
 Customer Name
 Customer

 US
 32804
 ORLANDO
 THE BIKE ZONE
 25010

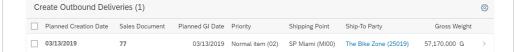
*### US

ΑII





This will produce the following screen.



Select the Sales Document and click on



You will see that the sales document is not available anymore.



Click on the home icon





Step 10: Check Stock Status

Task Check the inventory.

Time 5 min

Short Description Use the SAP Launchpad to check the stock status.

Name (Position) Sergey Petrov (Warehouse Employee)

To check on the inventory for the bikes in the sales order for The Bike Zone, use the app, *Display Stock Overview*.

Menu path



This will produce the following screen.

Stock Overview: Company Code/Plant/Storage Location/Batch					
Save as Variant More ∨					
Database Selections					
Material: (DXTR1500				
Pla	nt: MI00	to:			
Storage Locati	on:	to:			
Bat	ch:	to:			

If the Material and Plant fields are not automatically filled in, click on the Material field, then click on the search icon . Use the Sales material by description tab with **UE00** for Sales Organization, **WH** for Distribution Channel and *### for Material. Pick the black Deluxe Touring bike. Then, enter **MI00** in the Plant field.

When the Material and the Plant field are correctly filled (compare with the screenshot above), click on the execute icon Execute. This will produce the following screen.

UE00 WH *### MI00





Step 11: Check Outbound Delivery Status

Task Check the outbound delivery status.

Time 5 min

Short Description Use the SAP Launchpad to check the outbound delivery status.

Name (Position) Sergey Petrov (Warehouse Employee)

To check the outbound delivery status for the sales order from The Bike Zone, use the app *Outbound Deliveries*.

Fiori App



Choose

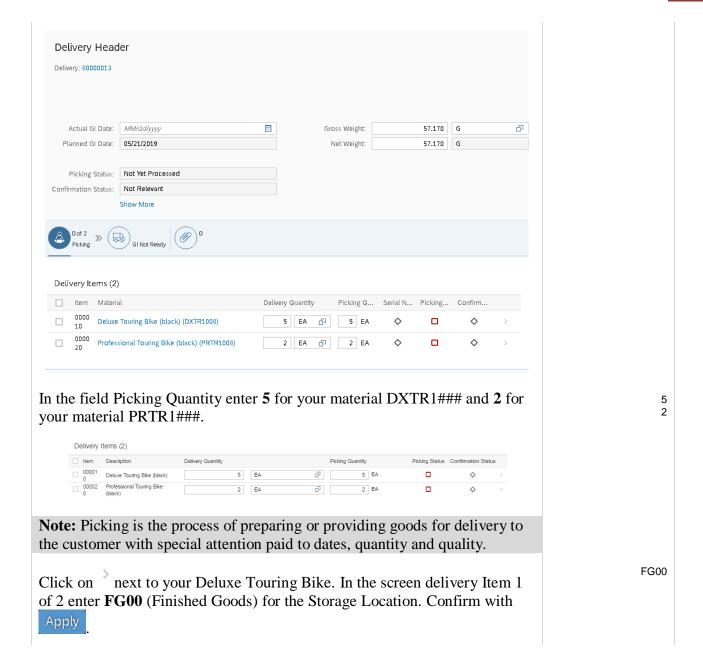
Adapt Filters (1)

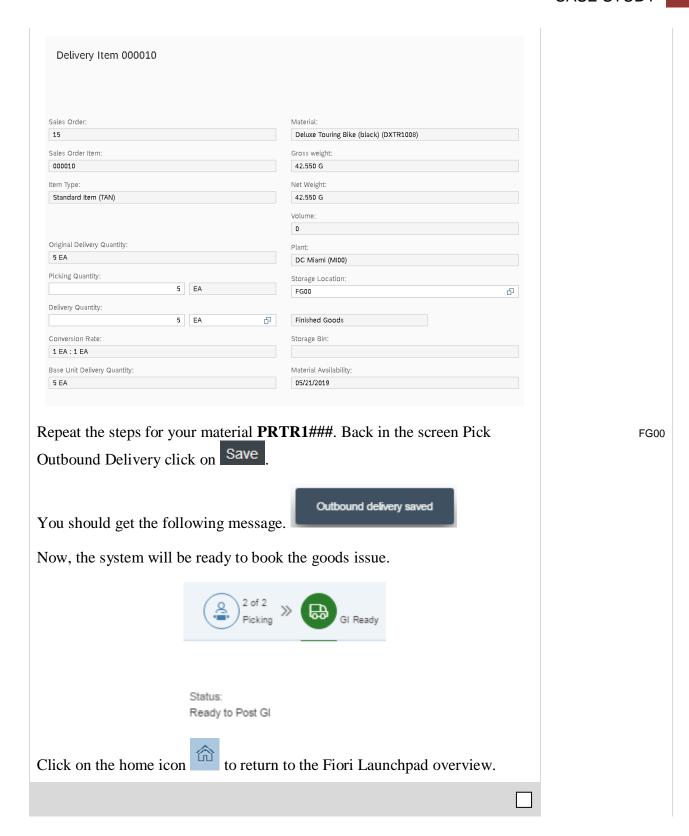
In the pop-up Adapt Filters change the Overall Status to *All*. Click on More Filters (5), choose the Filter *Created by* and click on the new Field your Name and click on Go.

You can see different Deliveries. Please note, that your screen may show more Deliveries.



You can check the status of your delivery. For further information, click on Pick







Step 12: Post Goods Issue

Task Post a goods issue.

Time 5 min

Short Description Use the SAP Launchpad to post a goods issue.

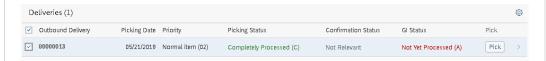
Name (Position) Sandeep Das (Warehouse Supervisor)

To post the goods issue (change the possession of the material from GBI to The Bike Zone), use the app *Outbound Deliveries*.

Fiori App



This will produce the following screen.



In the Overall Status field choose All. To see only your deliveries click on

Adapt Filters (2) and then More Filters (10) . There you have to select **Created by** and confirm your selection with OK. In the field of the newly created filter enter your user-name and press Enter.

*### Orlando

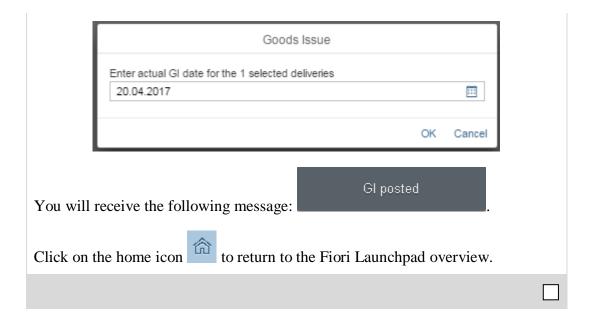
Select your delivery.



Press Post

In the pop-up Goods Issue enter **today** as actual GI date for the selected delivery and press ^{OK}.

today





Step 13: Check Stock Status

Task Check the inventory.

Time 5 min

Short Description Use the SAP Launchpad to check the stock status.

Name (Position) Sandeep Das (Warehouse Supervisor)

To see the impact that the goods issue for the bikes in the sales order for The Bike Zone has had on the inventory position of GBI, use the app *Display Stock Overview*.



Fiori App

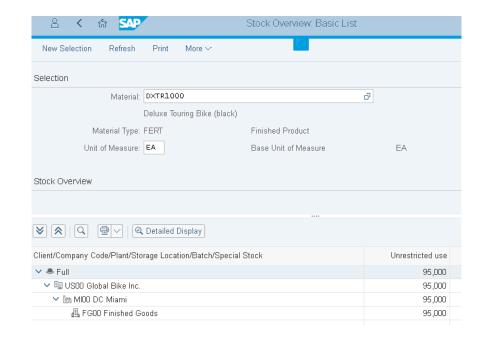
This will produce the *Stock Overview: Company Code/Plant/Storage Location/Batch* screen.

名 〈 命 <mark>SAP</mark> Stock O	Stock Overview. Company Code/Plant/Storage Location/Batch			
Save as Variant More ✓				
Database Selections				
Material: 🗏	DXTR1000			
Plant:	MIOO to:			
Storage Location:	to:	□		
Batch:	to:	□→		

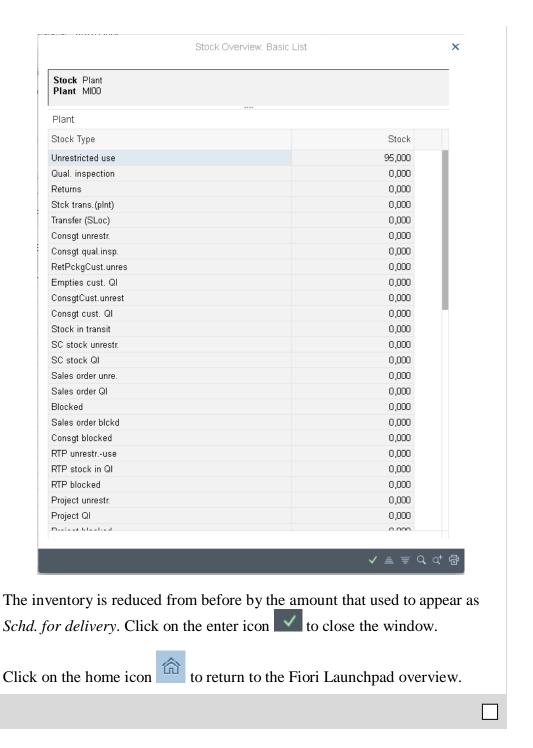
Click on the Material field, then click on the search icon . Use the *Sales material by description* tab with **UE00** for Sales Organization, **WH** for Distribution Channel and *### for Material. Pick the black Deluxe Touring bike. Then, enter **MI00** in the Plant field.

WH *### MI00

When the Material and the Plant field are correctly filled (compare with the screenshot above), click on Execute. This will produce the following screen.



Note that the available inventory has changed. Select the Miami DC, then click on the Detailed Display icon.





Step 14: Create Invoice for Customer

Task Create a billing document for a customer.

Time 10 min

Short Description Use the SAP Launchpad to create a customer billing document.

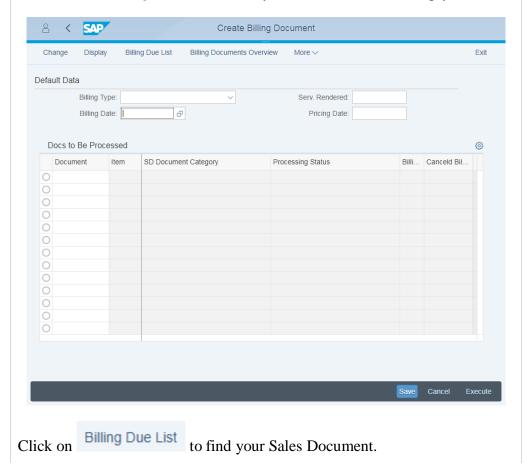
Name (Position) Stephanie Bernard (Billing Clerk)

With the delivery complete, the customer can be invoiced. To do this, use the app *Create Billing Documents VF01*.

Fiori App



In the Create Billing Document View you see that the List is empty.

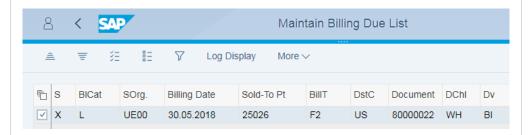


Today's date Customer number

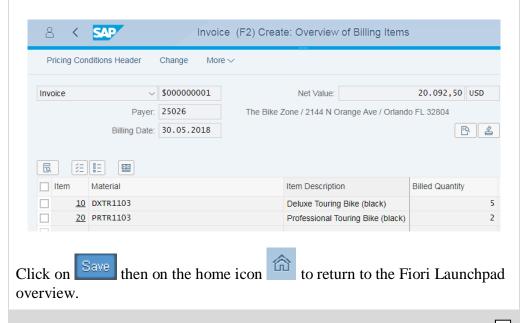
In the following screen *Maintain Billing Due List* select **todays date** for Billing Date From. In the Sold-To Party find **your customer**. Then click on

Display Billing List

Make sure your customer is selected and click on Individual Billing Document



You get an overview of your Billing Items. Make sure your two Bikes are listed.





Step 15: Display Billing Document and Customer Invoice

Task Display a billing document and a customer invoice.

Time 5 min

Short Description Use the SAP Launchpad to display a billing document/customer invoice.

Name (Position) Stephanie Bernard (Billing Clerk)

The invoice that will be sent to The Bike Zone can be viewed by using the app *Display Billing Document*.

Fiori App



This will produce the following screen.

8 <	命 SAP		Display Billing Document		
Billing Items	Accounting	Revenue Accounts	Display Document Flow	More ✓	
Billing Docu	ment:				
Mana October Oct	h!				
More Search Cri	teria				
Document Nu	mber:				
Company (Code:				
Fiscal	Year:				
Refer	ence:				
Q Sear	rch				

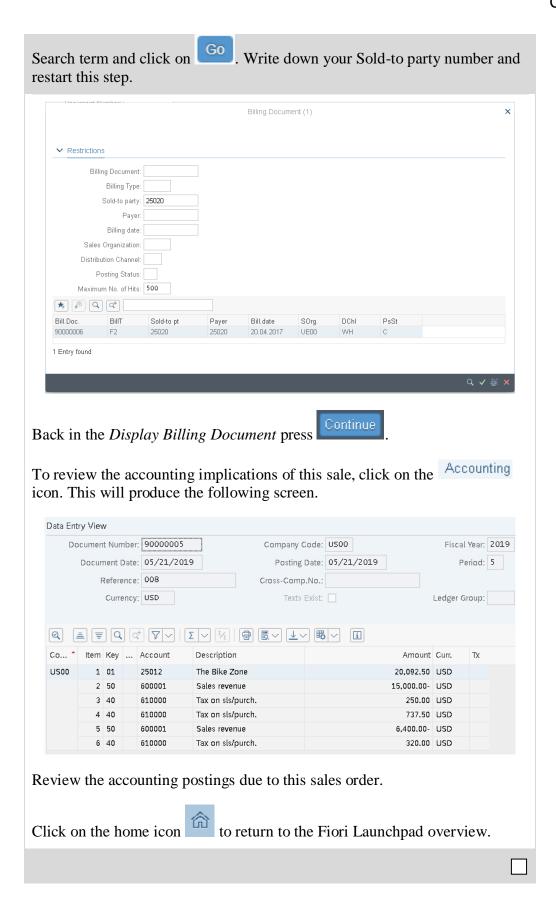
If the billing document number is not entered automatically, you can find it with the F4 help. Extend the tab *Restrictions*. Enter there your Sold-to party and press Enter.

Double click at your Billing Document Number.

If you don't know your Sold-to party number, go back to the Fiori Launchpad and open the App *Display Customer Balances*. Use the F4 Help in the Customer field. In the pop-up enter Orlando as City and *### as

F4 Sold-to party

> Fiori App F4 Orlando ####





Step 16: Post Receipt of Customer Payment

Task Post a customer payment receipt.

Time 10 min

Short Description Use the SAP Launchpad to post a customer payment receipt.

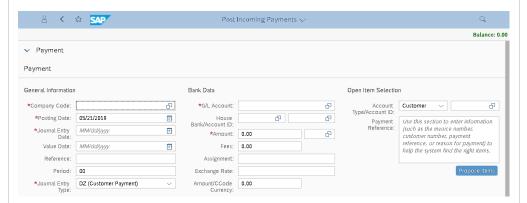
Name (Position) Jamie Shamblin (Cost Accountant)

After The Bike Zone mails its payment, it needs to be recorded. To do this, use the app *Post Incoming Payments*.

Fiori App



This will produce the following screen.

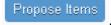


Enter **US00** for Company Code, the **current date** for the Posting and Journal Entry Date as well as for the Value Date. In the pull-down menu Journal Entry Type select **DZ**, the **current period** for Period. Enter **100000** G/L Account, \$20,092.50 and **USD** for Amount/Currency.

Under Open Item Selection, select in the Account Type/ Account ID field **Customer** and use the F4 help to find your customer number.

As The Bike Zone was created with the data set number (###) as a search term, you can use this and the City **Orlando** to find your Bike Zone customer.

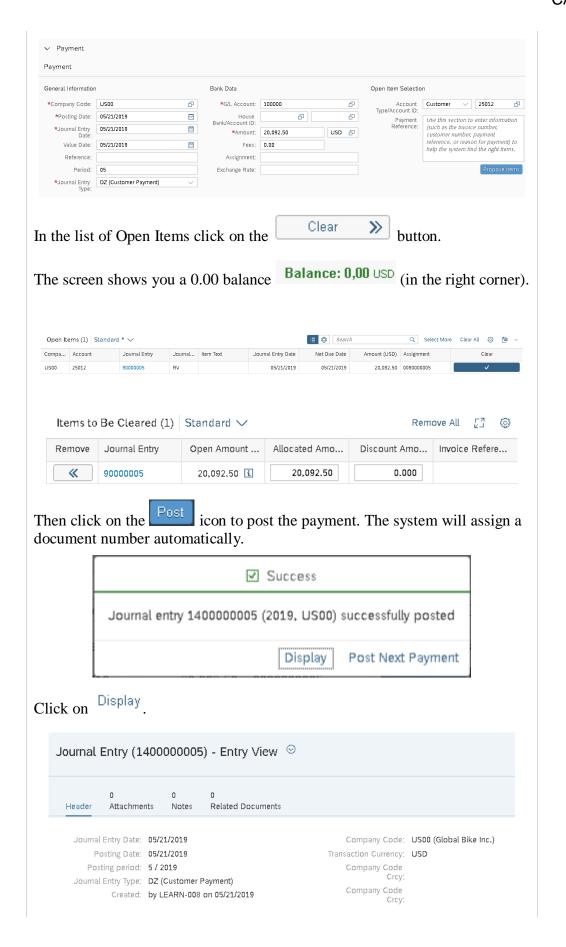
Compare your screen with the screenshot below and press

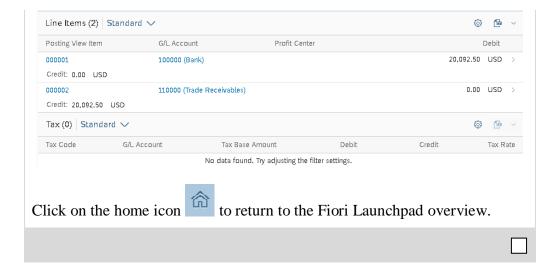


US00, current date, current date, DZ, current period, 100000, 20.092,50, USD

Customer

Orlando







Step 17: Review Document Flow

Task Review the document flow.

Time 5 min

Short Description Use the SAP Launchpad to review the document flow.

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

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 all material documents.

To display the document flow, use the app Material Documents Overview.

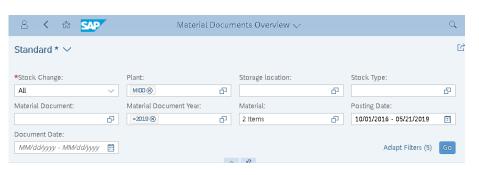
Fiori App



In the Material Documents Overview screen enter MI00 for Plant, DXTR1### and PRTR1### as Material and as Posting Date 01.10.2016-

MI00 DXTR1###, PRTR1### 01.10.2016-today

today. Compare your screen with the screenshot below and press



You will get an overview of the items.



Click in the row from the Deluxe Touring Bike, to get more information about the material document.

In the following screen click on Process Flow .

The document flow for The Bike Zone will look like the following.

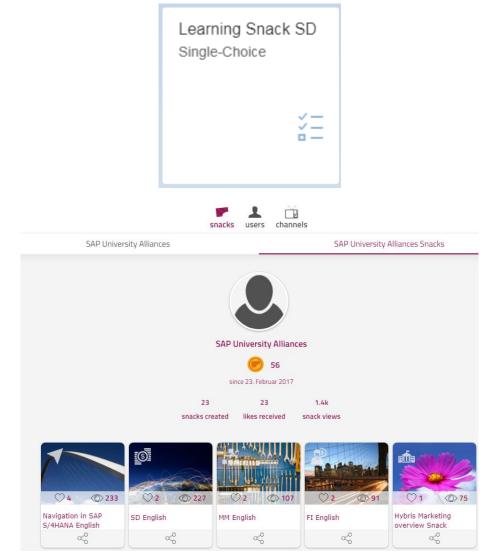


Click on the home icon to return to the Fiori Launchpad overview.

Learning Snacks

In order to test and consolidate your knowledge use the app *Learning Snack SD*.

Fiori App



You see all the snacks for the individual case studies. Select the Snack *SD English* and answer all fifteen questions.

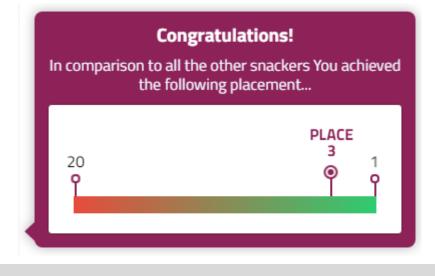
Hint:

If you do not see any Apps, you need to change the language on the page Learning Snacks. Therefore click on the current language right next to *change language* and choose **English**.



Learning Snack

When you have answered all the questions you will receive a success message and your placement.



SD Challenge

Learning Objective Understand and perform an integrated order-to-cash-process. **Time** 75 min

Motivation Having successfully completed the case study *Sales and Distribution*, you should be able to perform the following task independently.

Scenario Your customer The Bike Zone wishes to profit from your new initiative, which promises one free off-road helmet for each mountain bike ordered. A single item can be marked as a Free of Charge Item (Item Category - TANN) within the Item detail view of a standard order. Please note that off-road helmets belong to a different division. Notice that you thus need to expand the rights of your customer The Bike Zone to the effect that the company can release cross-division orders for the divisions accessories and cross-division. Subsequently, please sell five mountain bikes for men and five mountain bikes for women to The Bike Zone. Since The Bike Zone is a long-term customer, the company gets \$50 discount on each ordered mountain bike and an additional discount of 3% off the gross price for the complete purchase.

Task Information Since this task is based on the case study *Sales and Distribution*, you are allowed to use it for support. It is however recommended to solve this advanced task without support to test the newly gained knowledge. Perform a complete order-to-cash-process including the incoming payment of your customer