

SD 1: Display Customer Master Data

Exercise Use the SAP Fiori Launchpad to display a customer.

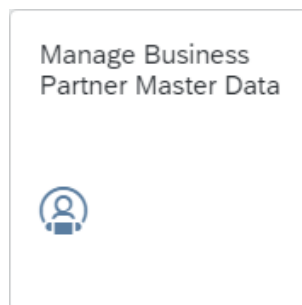
Time 10 min

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)

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.

Start



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

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


Business Partner

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).

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.

Help Topics

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.

Performance Assistant

**Material Number**

Alphanumeric key uniquely identifying the [material](#).

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** (###).

*###

Business Partner

Search and Select

Define Conditions

*400

Go

Hide Filters

Business Partner:

Title:

Business Partner Category:

External BP Number:

First Name:

Last Name:

Organization Name 1:

Show All Filters

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.

Items (52)

<input type="checkbox"/>	Business Partner	Title	Business Partner Name	Business Partner...	External BP Num1
<input type="checkbox"/>	101400	Company	Olympic Protective Gear	2	
<input type="checkbox"/>	102400	Company	Boomtown Tire & Wheel	2	
<input type="checkbox"/>	103400	Company	Dallas Bike Basics	2	
<input type="checkbox"/>	104400	Company	Lightbulb Accessory Kits	2	
<input type="checkbox"/>	105400	Company	Space Bike Composites	2	

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

Beantown Bikes

<input type="checkbox"/>	Business Partner	Title	Business Partner Name	Business Partner...
<input type="checkbox"/>	128400	Company	Peachtree Bikes	2
<input checked="" type="checkbox"/>	129400	Company	Beantown Bikes	2
<input type="checkbox"/>	130400	Company	Windy City Bikes	2

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

Standard

Editing Status: All Role: Business Partner: Beantown Bikes... Last Name/Name1: First Name/Name2: Street: City: Country/Region: Go Adapt Filters (1) Enter

Business Partners (1)

Business Partner	City	Postal Code
Beantown Bikes 129400	Boston	02210

Country/Region: US
Role: FI Customer (FLCU00), Customer (FLCU01)

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.

Beantown Bikes
129400

Grouping: External Number Assignment (0002) Standard Address Standard Communication
Business Partner Category: Organization (2) 299 Summer St, Boston MA 02210, USA Phone Number: - Email: -


Basic Data Roles Address Address-Independent Communication Bank Accounts Payment Cards Identification Contacts Relativ




General Information

Organization Title: Company (0003)	Legal Form: -	Created By: CREICH
Name 1: Beantown Bikes	Foundation Date: -	Created On: 08/18/2021
Name 2: -	Liquidation Date: -	Last Changed By: -
Name 3: -	Authorization Group: Stakeholder: Visibility 0 (Unrestricted)	Last Changed On: -
Name 4: -	External BP Number: -	
Search Term 1: 400	Archiving Flag: No	
Search Term 2: -		
Business Partner Type: -		

Roles




Customer | FLCU01


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 .

Basic Data ▾ Roles Address ▾ Bank Accounts Payment Cards Identification ▾ Contacts Attachments		
<div>Search </div>		
Business Partner Role	Valid From	Valid To
FI Customer FLCU00	08/18/2021	12/31/9999 
Customer FLCU01	08/18/2021	12/31/9999 

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.

Sales Areas						
Sales Areas (2)						
Sales Organization	Distribution Channel	Division	Delivery Block	Billing Block	Order Block	Account At Customer
<input type="radio"/> US East UE00	Wholesale WH	Accessories AS				
<input type="radio"/> US East UE00	Wholesale WH	Bicycles BI				
Company Codes						
Company Codes (1)						
Company Code	Reconciliation Acc...	Accounting Clerk	Payment Terms	Posting Bl...	Deletion BL...	
<input type="radio"/> Global Bike Inc. US00	1200000		Pay immediately w/o deduction (0001)	No	No	

Click on  to return to the SAP Fiori launchpad.



SD 2: Display Customer Order

Exercise Use the SAP Fiori Launchpad in order to display a customer order.

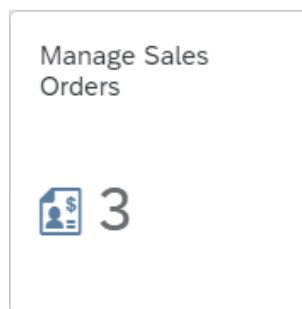
Time 10 min

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

Standard* ▾

Search Sales Order: Sold-To Party: Customer Reference: Requested Delivery Date:

Overall Status: Document Date: Adapt Filters (1) **Go**

<input type="checkbox"/>	Sales Order	Sold-To Party	Customer Reference	Requested Delivery Date	Overall Status	Net Value	Document Date
<input type="checkbox"/>	1	Beantown Bikes (129998)	Z998	09/06/2021	Completed	15,000.00 USD	08/23/2021

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.

Display Standard Order 1: Overview

Menu ▾

Standard Order: Net Value: 15,000.00 USD

Sold-to Party: 129998 Company Beantown Bikes, 299 Summer St, Boston MA 02210, USA

Ship-to Party: 129998 Company Beantown Bikes, 299 Summer St, Boston MA 02210, USA

Cust. Reference: Z998 Cust. Ref. Date: 08/23/2021

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
<input checked="" type="checkbox"/>	10 DXTR1998			5 EA	<input type="checkbox"/>	Deluxe Touring Bike (black)
<input type="checkbox"/>						
<input type="checkbox"/>						

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...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PR00 Price	3,000.00	USD	1	EA	15,000.00	USD		1
<input type="checkbox"/>		Gross Value	3,000.00	USD	1	EA	15,000.00	USD		1
<input type="checkbox"/>		Discount Amount	0.00	USD	1	EA	0.00	USD		1
<input type="checkbox"/>		Rebate Basis	3,000.00	USD	1	EA	15,000.00	USD		1
<input type="checkbox"/>		Net Value for Item	3,000.00	USD	1	EA	15,000.00	USD		1
<input type="checkbox"/>		Net Value 2	3,000.00	USD	1	EA	15,000.00	USD		1
<input type="checkbox"/>		Total	3,000.00	USD	1	EA	15,000.00	USD		1
<input type="checkbox"/>	<input checked="" type="checkbox"/>	SKTO Cash Discount	0.000	%			0.00	USD		0
<input type="checkbox"/>	<input checked="" type="checkbox"/>	VPRS Internal price	1,400.00	USD	1	EA	7,000.00	USD		1
<input type="checkbox"/>		Standard - USA /With	1,600.00	USD	1	EA	8,000.00	USD		1

Click on  to return to the SAP Fiori launchpad.



SD 3: Display Outbound Delivery Document for Sales Order

Exercise Use the SAP Fiori Launchpad to display an outbound delivery.

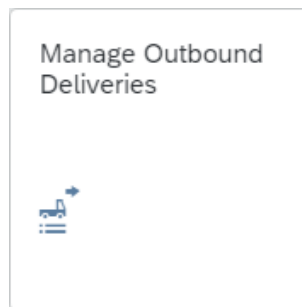
Time 10 min

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 might start 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

Standard* ☒

Shipping Point: Picking Date: Ship-to party: Planned GI Date: Overall Status: **All**

Adapt Filters (1) **Go**

Deliveries (3) Post GI (0) Reverse GI (0)

<input type="checkbox"/>	Outbound Delivery	Picking Date	Priority	Picking Status	Confirmation Status	GI Status	Pick
<input checked="" type="checkbox"/>	80000000	08/31/2021	Normal item (02)	Completely Processed (C)	Not Relevant	Completely Processed (C)	Pick >
<input type="checkbox"/>	80000001	08/31/2021	Normal item (02)	Completely Processed (C)	Not Relevant	Completely Processed (C)	Pick >
<input type="checkbox"/>	80000002	08/31/2021	Normal item (02)	Completely Processed (C)	Not Relevant	Completely Processed (C)	Pick >

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

SAP Outbound Delivery

80000000
Outbound Delivery

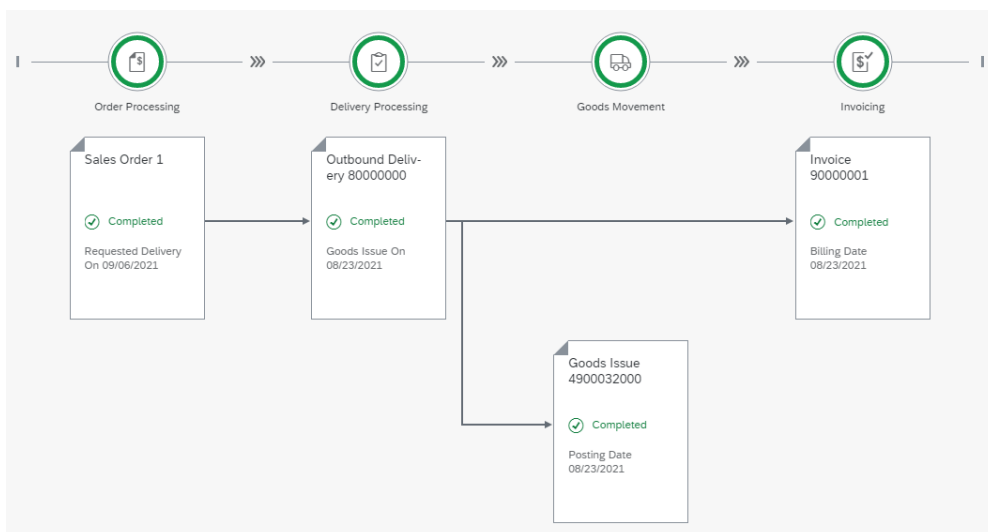
Ship-to Party: [Beantown Bikes \(129998\)](#) Overall Status: ✔ Completed Delivery Date: 09/06/2021
Sold-to Party: [Beantown Bikes \(129998\)](#) Shipping Point: SP Miami (MI00)

General Information | Items | Business Partners | Process Flow | Attachments

Sales Organization: US East (UE00)	Document Date: 08/23/2021	Picking Status: Fully Picked (C)
Gross Weight: 42,550.000 G	Picking Date: 08/31/2021	Warehouse Management Status: No WM Trnsf Ord Req'd
Net Weight: 42,550.000 G	Transport Planning Date: 08/29/2021	Pick Confirmation Status: Not Sub. to Confirm.
Volume: 0.000 -	Loading Date: 09/03/2021	Packing Status: Packing Not Required
Delivery Type: Outbound Delivery (LF)	Planned Goods Movement Date: 09/04/2021	Goods Movement Status: ✔ Completed
Route: Northern Route (000001)	Actual Goods Movement Date: 08/23/2021	Product Marketability Status: OK - Not Relevant
		Dangerous Goods Status: OK - No Dangerous Goods; Not Relevant
		Safety Data Sheet Status: OK - Not Relevant

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

Items (1)

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

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

<

SAP

Outbound Delivery Item

Q

?

LL

80000000 /
Deluxe Touring Bike (black)
DXTR1998

Item

Picking Status: Fully Picked

Picking Confirmation Status: Not Sub. to Confirm.

WM Activity Status: No WM Trnsf Ord Req'd

Product Marketability Status: OK – Not Relevant

Dangerous Goods Status: OK – Not Relevant

Safety Data Sheet Status: OK – Not Relevant

Excise Tax ARC Status: Not defined

10

General Information

Quantities

Warehouse

Serial Numbers

Loading/Shipment

Financial Processing

Goods Movement

Related Sales Orders

Material:
Deluxe Touring Bike (black) (DXTR1998)

Batch:

Date of Manufacture:
–

Item Description:
Deluxe Touring Bike (black)

Valuation type:
–

SLED/BBD:
–

Item Category:
Standard Item (TAN)

EAN/UPC:
–

Inspection Lot:
–

Customer Material:
–

Value Chain Type:
–

Value Chain Category:
–

Quantities

Order Quantity:
5 EA

Conversion Rate:
1 EA : 1 EA


Overdelivery Tolerance:
0.0 %

Actual Delivery Quantity:
5 EA

Base Unit Delivery Quantity:
5 EA

Underdelivery Tolerance:
0.0 %

Tolerance Unlimited:
No

Click on  to return to the SAP Fiori launchpad.

SD 4: Display Billing Document

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

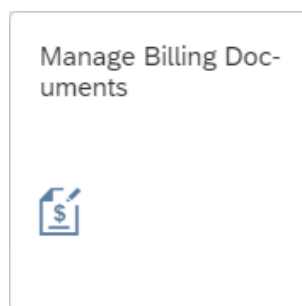
Time 5 min

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

Billing Document	Billing Type	Sold-To Party	Status	Billing Date	Net Value
<input type="checkbox"/> 90000001	Invoice (F2)	Beantown Bikes (129998)	Completed	08/23/2021	15,000.00 USD

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.

The screenshot shows the SAP Fiori app interface for 'Manage Billing Documents'. The top bar includes the SAP logo and navigation icons. Below the header, the invoice number '90000001' is displayed. Action buttons include 'Edit', 'Preview', 'Cancel Billing Document', and 'Post Billing Document'. A summary table shows the following data:


Payer	Sold-to Party	Billing Document Status	Net Value	Tax Amount	Total Amount
Beantown Bikes (129998)	Beantown Bikes (129998)	Completed	15,000.00 USD	0.00 USD	15,000.00 USD

Below the summary, there are tabs for 'General Information', 'Terms and Conditions', 'Items', 'Partners', 'Accounting Data', 'Process Flow', 'Pricing Data', 'Pricing Elements', and 'Tax'. The 'Pricing Elements' tab is selected, showing a list of items with their respective amounts and currencies.

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

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  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.

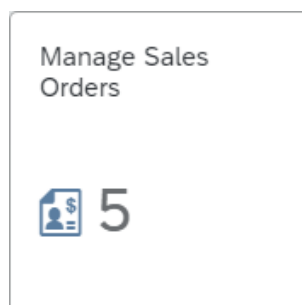
Name (Position) David Lopez (Sales Representative US East)

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).

Document Flow

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

Start

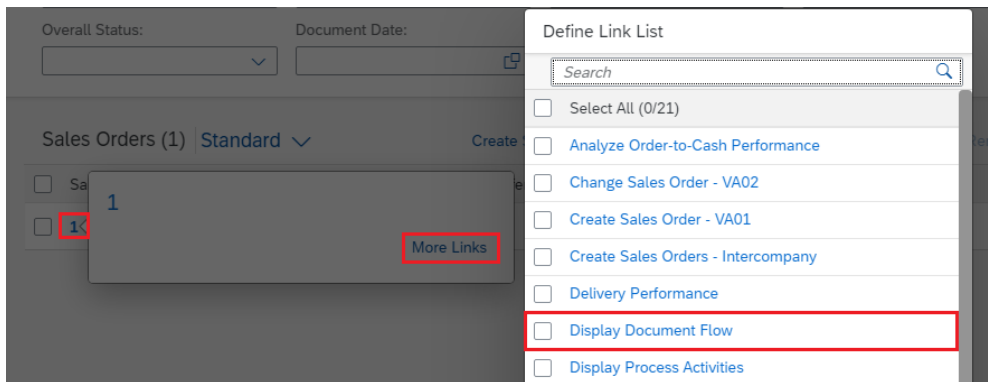


On the overview screen, in the *Sales Order* field enter **1** and click **Go**.

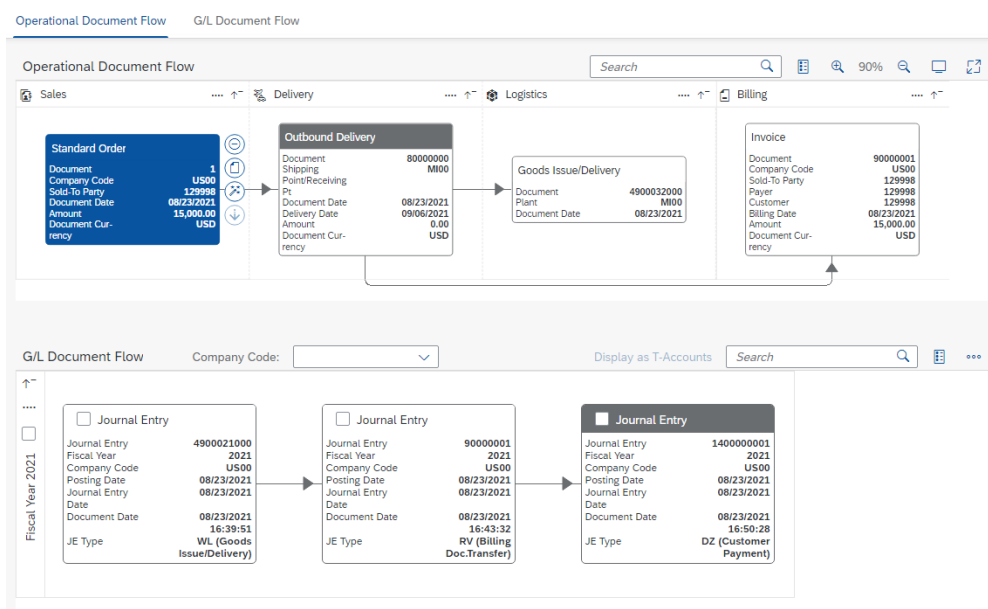
1


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.

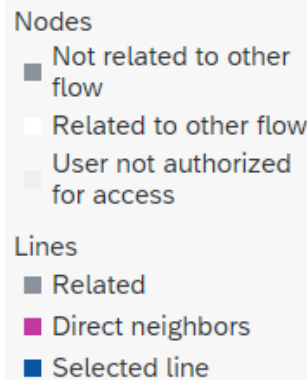
Display Document Flow



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.

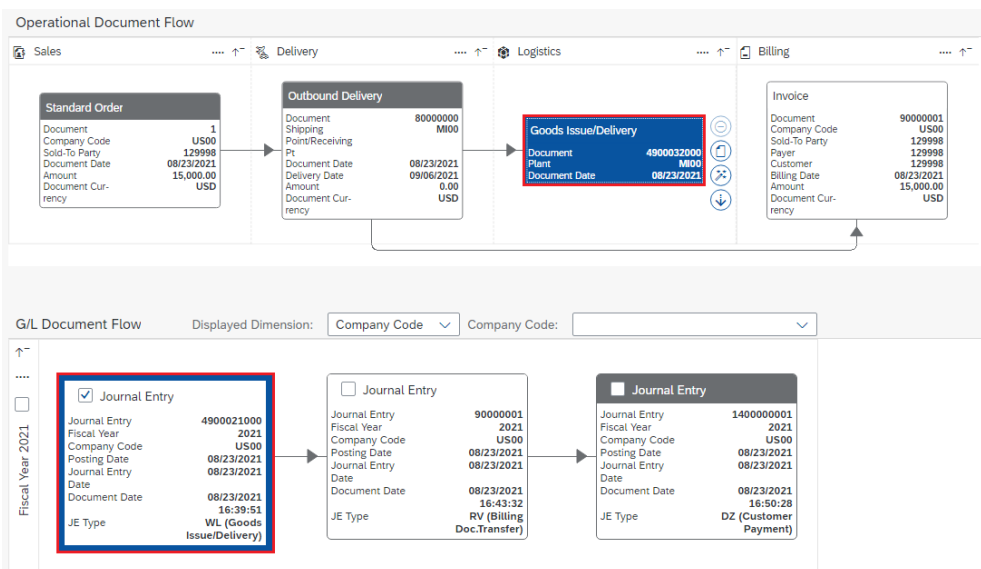


With the help of this document chain, complex relationships can be recognized. For a better overview, you have the possibility to expand/collapse groups, or to Zoom In/Out/Fit the view to the window size in the right screen area. By clicking , you can also fade in a legend.



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.


Balance Sheet Accounts

1040000 Work in progress US00/0L/2021	Credit: 7,000.00 USD
Debit	Credit
	7,000.00 USD Journal Entry: 4900021000 Posting Date: 08/23/2021

Profit and Loss Accounts

6993000 Cost of Goods Sold US00/0L/2021	Debit: 7,000.00 USD
Debit	Credit
7,000.00 USD Journal Entry: 4900021000 Posting Date: 08/23/2021	

On the *Display Journal Entries – In T-Account View* 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.

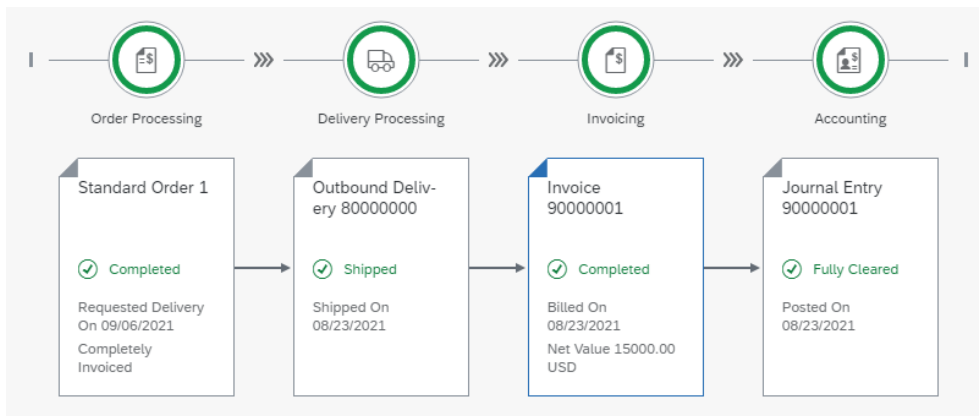
For more details, you can access any document from the document flow. For example, to view the invoice, select it and click the button  (*Details*) that appears. The already familiar context menu will open. Select the *Manage Billing Documents* app.


Manage Billing Documents

90000001
Change Billing Documents Create Billing Documents Create Billing Documents - VF01 Display Billing Documents Display Billing Documents - Redacted Display Process Flow - Accounts Receivable Manage Billing Documents Sales Volume - Profit Margin Sales Volume Analysis
More Links

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.

Process Flow



Click on  to return to the SAP Fiori launchpad.

