

Customer Service (CS)

Curriculum: Introduction to S4HANA using Global Bike

Teaching material - Information



Teaching material - Version

- 4.2 (June 2022)
- Software used
 - SAP S/4HANA 2022
 - Fiori 3.0
- Model
 - Global Bike
- Prerequisites
 - No Prerequisites needed



Module Information



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Target Audience

- Beginner

Module Information



Learning Objectives

You are able to

- name some functionalities of the CS module.
- define the central organizational structures of the CS module.
- summarize the master data which is most important for the CS module.
- explain standard processes of the Customer Service.

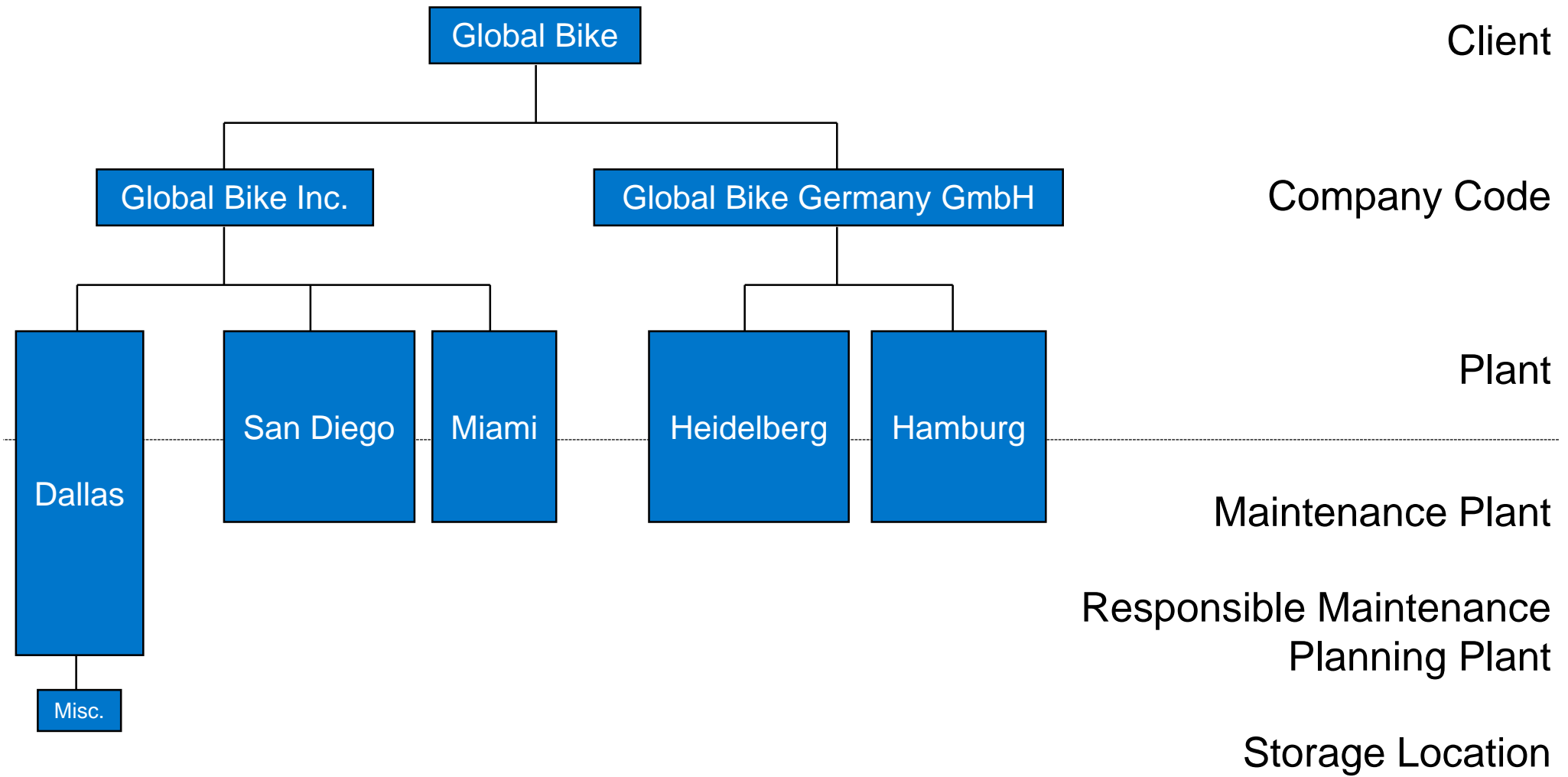
Functionality

- Service Contract
- Service Notification
- Service Order
- Goods Return and Repair

Agenda

- CS Organizational Structure
- CS Master Data
- CS Processes

GBI Structure for Customer Service



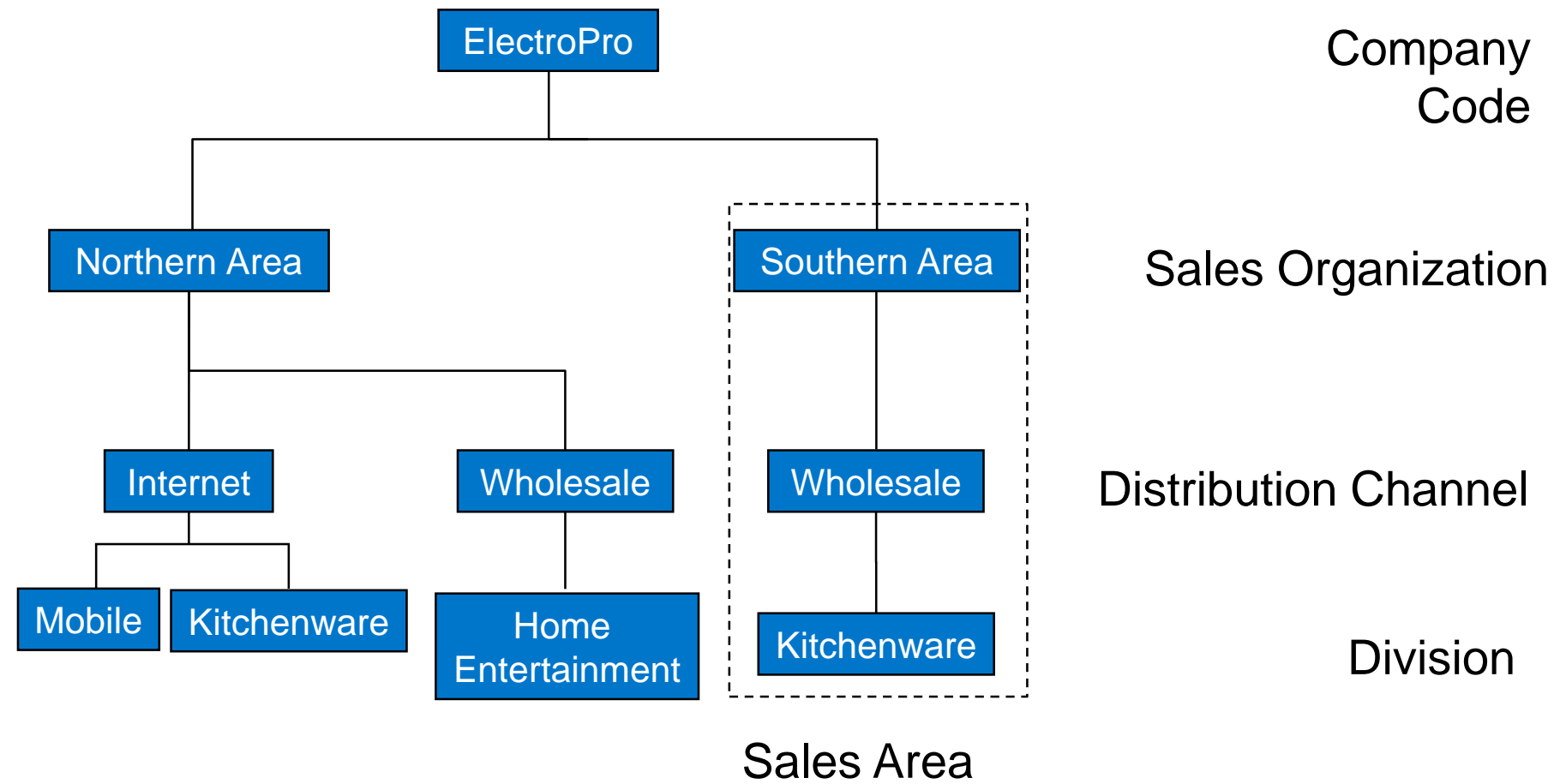
CS Organizational Structure

- Client
 - An independent environment in the System
- Company Code
 - Smallest org unit for which you can maintain a legal set of books
- Storage Location
 - An organizational unit allowing differentiation between the various stocks of material in a plant
- Plant
 - Operating area or branch within a company
 - Manufacturing, distribution, purchasing or maintenance facility
 - Place in which the technical objects of a company are installed

CS Organizational Structure

- Sales Organization
 - An organizational unit responsible for the sale of certain products or services.
 - The responsibility of a sales organization may include legal liability for products and customer claims
- Distribution Channel
 - The way in which products or services reach the customer
 - Typical examples of distribution channels are wholesale, retail, or direct sales
- Division
 - A way of grouping materials, products, or services
- Sales Area
 - Combination of Sales Organization, Distribution Channel and Division
 - Determines conditions (i.e. pricing) for sales activities

Sales Area (example)



CS Organizational Structure

- Sales Office
 - establishes contact between the firm and the regional market
- Sales Group
 - performs and is responsible for sales transactions
- Shipping Point
 - performs shipping processing and is the part of the company responsible for the type of shipping, the necessary shipping materials and the means of transport
- Picking Location
 - place where the goods will be picked for shipping
- Purchasing Organization
 - organizational unit responsible for procuring services and materials

CS Organizational Structure

- Operating Concern
 - represents a part of an organization for which the sales market is structured in a uniform manner
 - a operating profit for the individual market segments can be calculated
 - multiple controlling areas can be assigned to one operating concern
- Controlling Area
 - a self-contained, organizational unit for which the management of revenues and expenses can be performed
 - may include one or more company codes; therefore, an enterprise can perform management accounting analyses and reports across several companies
 - a way to identify and track where revenues and costs are incurred for evaluation purposes

Agenda

- CS Organizational Structure
- CS Master Data
- CS Processes

CS Master Data

- Customer Master Data
- Equipment
- Work Center
- Bill of Material
- Material Master Data
- Vendor Master Data

Customer Master Data

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

The screenshot shows the SAP Business Partner interface for 'The Bike Zone 000' (ID 1003063). The header bar includes the SAP logo and 'Business Partner' with a dropdown arrow. Below the header, the business partner name and ID are displayed. A building icon is shown next to the 'Grouping: Internal number assignment (0001)' and 'Business Partner Category: Organization (2)' labels. To the right, 'Standard Address' and 'Standard Communication' are listed with the address '2144 N Orange Ave 32804 Orlando US'. A navigation bar below the header contains tabs: 'Basic Data' (selected), 'Roles', 'Address', 'Bank Accounts', 'Payment Cards', 'Identification', 'Contacts', and 'Attachments'. The 'Basic Data' tab is expanded, showing the 'General Information' section. This section contains input fields for 'Title' (set to 'Company'), 'Name 1' (set to 'The Bike Zone 000'), 'Name 2', 'Name 3', 'Name 4', 'Search Term 1' (set to '000'), and 'Search Term 2'.

Equipment Master Record

- Equipment Master Data
 - contains all information around equipment
- Information in four views:
 - General
 - Location
 - Organization
 - Structure

The screenshot displays the SAP 'Display Equipment : Location' interface. At the top, the SAP logo and title are visible. Below the title bar, there are navigation icons and a menu with options like 'Class overview', 'Measuring points/counters', 'AllMeasDocs', 'Services for Object', and 'More'. The main form area contains fields for 'Equipment' (10000000), 'Category' (G), 'Description' (Circulation Fan), 'Status' (INST), 'Valid From' (01/01/2009), and 'Valid To' (12/31/9999). A tabbed interface below these fields shows 'General', 'Location' (selected), 'Organization', 'Structure', 'Sales and Distribution', 'SerData', and 'Configuration data'. The 'Location data' section includes fields for 'MaintPlant' (DL00), 'Location' (DALLAS TX), 'Room', 'Plant Section' (1), 'Work center' (MANT1000), 'ABC Indic.' (C), and 'Sort Field'. It also displays associated data like 'Plant Dallas', 'Global Bike Inc. MFG', 'Hiro Abe', '972-555-3000', and 'DL Maintenance'. The 'Address' section at the bottom has fields for 'Name', 'Street', 'Location', 'Telephone', and 'Fax'.

< **SAP** Display Equipment : Location

Class overview Measuring points/counters AllMeasDocs Services for Object More

Equipment: 10000000 Category: G Equipment/Assets

Description: Circulation Fan

Status: INST

Valid From: 01/01/2009 Valid To: 12/31/9999

General **Location** Organization Structure Sales and Distribution SerData Configuration data

Location data

MaintPlant: DL00 Plant Dallas

Location: DALLAS TX Global Bike Inc. MFG

Room:

Plant Section: 1 Hiro Abe 972-555-3000

Work center: MANT1000 DL Maintenance

ABC Indic.: C Relatively unimport.

Sort Field:

Address

Name:

Street:

Location:

Telephone: Fax:

Equipment / Functional Location - Definition

■ Equipment

- Individual and autonomous technical unit
- Physical object for which maintenance tasks are planned and performed
- Equipments can be placed in functional locations

■ Functional Location

- Hierarchal organized structure which represents e.g. a technical system, a building or a part of it
- Structural depiction of a technical plant
- Planning and performing maintenance tasks

■ Classification

- assignment of an item or initiative to one or several buckets of a classification hierarchy
- The act of assigning a value of a given characteristic to an object

Equipment / Functional Location - Definition

- Measuring point and counter reading
 - describes the state of a technical object
 - important for regulations, e.g. emission limits of a plant
- Serial number
 - used for individualization of materials
 - distinguish materials with the same material number
 - specify the exact location of an unique good
 - save additional information
 - e.g. manual, warranty information

Work Center

- A location within a plant where value-added work (operations or activities) are performed
 - Work Centers can represent
 - People or Groups of People
 - Machines or Groups of Machines
 - Assembly Lines
- Work center used to define capacities
 - Labor
 - Machine
 - Output
 - Emissions
- Capacities used in
 - Capacity requirements planning (CRP)
 - Detailed scheduling
 - Costing

Bill of Material – Definition

- Complete formally structured list of all components
- Material BOMs can be allocated to functional locations or equipment
- Three types of BOMs in Enterprise Asset Management:
 - Material BOMs
 - Equipment BOMs
 - Functional location BOMs
- Advantages
 - Structuring of objects
 - Service parts planning in maintenance orders and maintenance task lists
 - Within plant maintenance BOMs are used, if similar object should be maintained

Warranties

- A guarantee to vouch for defects or faults in the product purchased, valid for a specific period of time
- The type and scope of the services covered, such as repairing a defect for free or taking the product back, are defined in the warranty
- Can be distinguished in vendor-, manufacturer- or customer warranty
- Valid for a specific technical object
 - functional location, equipment or serial number

Material Master Data

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

The screenshot displays the SAP Material Master Data interface for a product named 'Deluxe Touring Bike (black)' with material number 'DXTR1000'. The interface is organized into a header bar, a main data area, and a bottom table.

Header Bar: Features a back arrow, the SAP logo, and a 'Product' dropdown menu.

Main Data Area: Contains the product name 'Deluxe Touring Bike (black)' and material number 'DXTR1000'. Below this is a blue icon representing a bicycle. To the right of the icon, the following details are listed:

- Product Type: Finished Product (FERT)
- Product Category: Product
- Product Group: Finished Bikes (BIKES)
- Base Unit of Measure: Each (EA)
- GTIN:
- GTIN Category:
- Revision Level:

Navigation Tabs: A row of tabs is located below the main data area, including 'General Information' (selected), 'Product Compliance', 'Components', 'Texts', 'Sales', 'Storage', and 'Warehouse Management'.

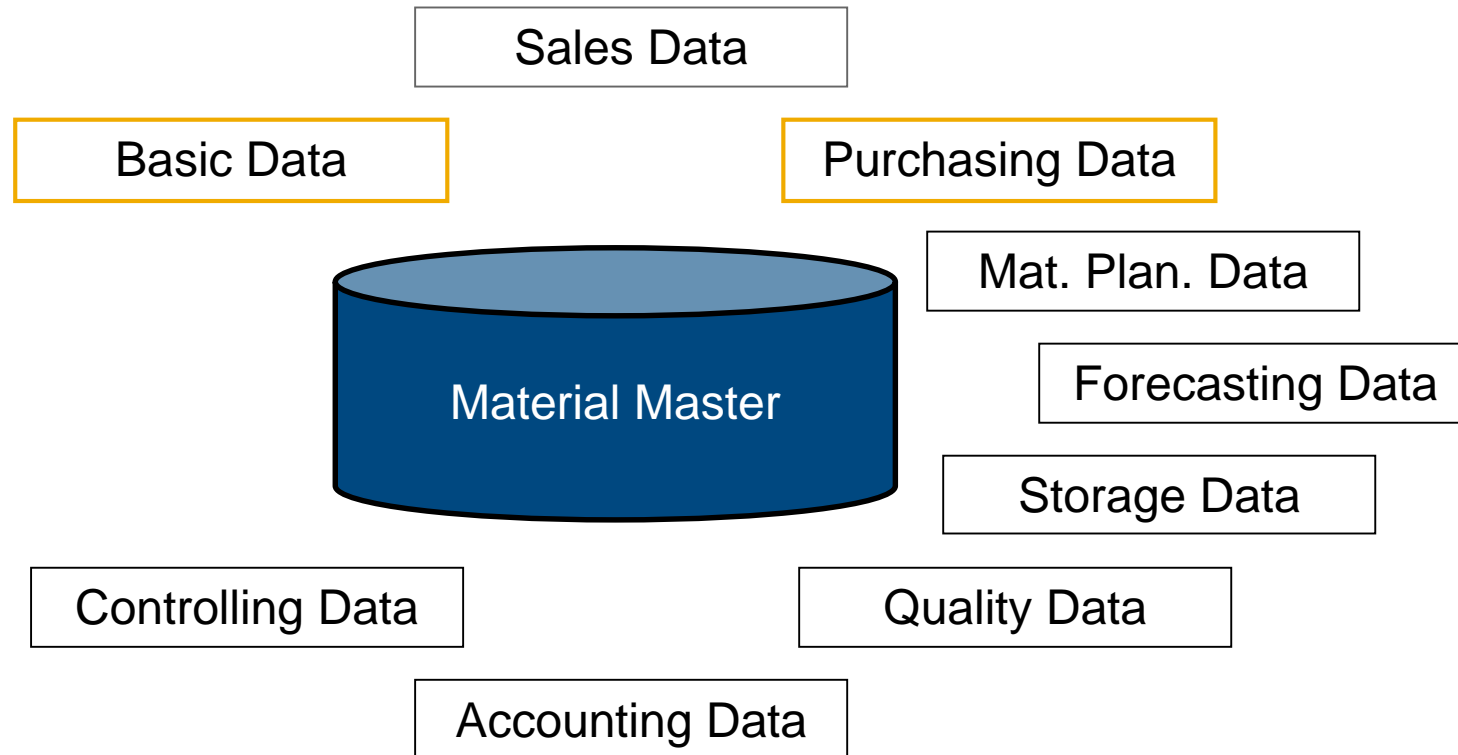
Basic Data Section: This section contains the following information:

- Division: Bicycles (BI)
- Old Product Number: -
- Batch Management Required: No
- Marked for Deletion: No

Descriptions Section: This section contains a table with two columns: 'Language' and 'Product'.

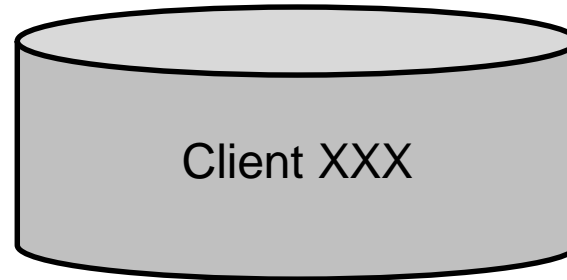
Language	Product
German DE	Deluxe Touring Bike (schwarz)
English EN	Deluxe Touring Bike (black)

Material Master Views



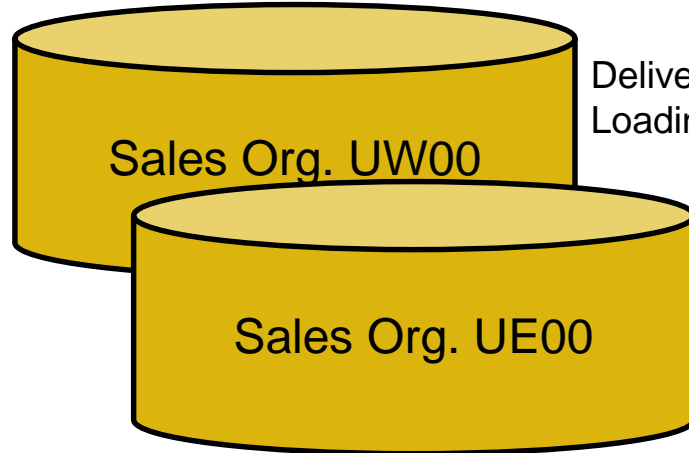
Material Master

General Information relevant for the entire organization:



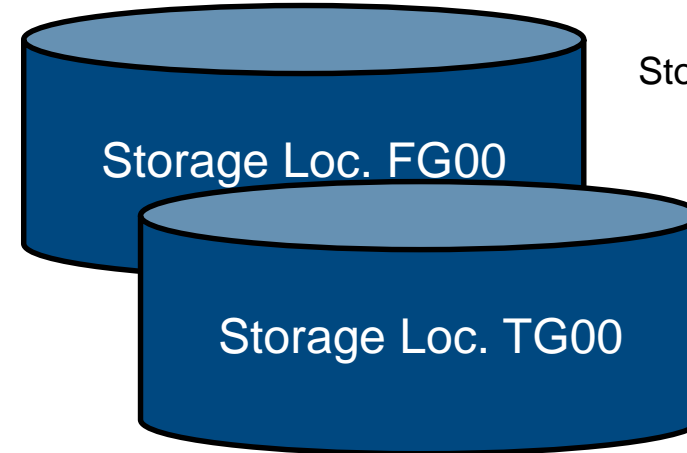
Name
Weight
Unit of Measure

Sales specific information:



Delivering Plant
Loading Grp

Storage Location specific information:



Stock Qty

Vendor Master Data

- Contains all the necessary information needed to business with an external supplier
- Used and maintained primarily by the Purchasing and Accounting Departments
- Every vendor MUST have a master record
- The supplier master record is created in SAP S/4HANA as a central business partner master record with different roles.
- For suppliers, these are often the business partner roles:
 - FLVN00 (FI Vendor)
 - FLVN01 (Vendor)

The screenshot displays the SAP Business Partner master data for 'Olympic Protective Gear' (ID 101000). The interface includes a top navigation bar with the SAP logo and a search bar. Below the header, there are tabs for 'Basic Data', 'Roles', 'Address', 'Bank Accounts', 'Payment Cards', 'Identification', 'Contacts', and 'Attachments'. The 'Roles' tab is currently selected, showing a table of business partner roles. The table has columns for 'Business Partner Role', 'Valid From', and 'Valid To'. Two roles are listed: 'FI Vendor' (FLVN00) and 'Vendor' (FLVN01), both with a validity period from 08/18/2021 to 12/31/9999. Below the table, the 'Address' tab is selected, showing the 'Standard Address' section. The address details include: Street: 2100 Summit Boulevard, Country: USA (US), Post Office Postal Code: -, House Number: -, Region: Georgia (GA), Post Box: -, Postal Code: 30319, and City: Atlanta.

Business Partner Role	Valid From	Valid To
FI Vendor FLVN00	08/18/2021	12/31/9999
Vendor FLVN01	08/18/2021	12/31/9999

Address

Standard Address

Street:	Country:	Post Office Postal Code:
2100 Summit Boulevard	USA (US)	-
House Number:	Region:	Post Box:
-	Georgia (GA)	-
Postal Code:		
30319		
City:		
Atlanta		

Vendor Master Views

- Client Level
 - Address
 - Vendor Number
 - Preferred Communication
- Company Code Data
 - Reconciliation Account
 - Terms of Payment
 - Bank Account
- Purchase Org Data
 - Purchasing Currency
 - Salesman's Name
 - Vendor Partners

General Data

Company Code Data
Financial Accounting (FI)

Purchasing Data
Materials Mgmt (MM)

Service Contract and Types

- Long term agreement
 - predefined validity period
 - for at least one technical object
 - predefined services
 - predefined conditions
- Header
 - Sales-, contract-, and billing data
 - Billing plan
 - Conditions
- Items
 - Service
 - Configuration
 - Technical Objects
- Service contract
 - Solve reported problems of a customer
- Service and maintenance contract
 - Maintenance of technical object in a predefined manner
 - Master agreement with a customer
 - Reversal of a predefined quantity or value

Service Notification

- Means by which notifications from a customer are entered and managed in Customer Service
- Used for documentation and evaluation

- Components
 - Customer information
 - Information about technical object and service contract
 - Information about valid warranties

- Types
 - Customer message / problem notification
 - Service request
 - Technical completion

- If there is need for action a service order will be created

Service Order

- Precise assessment of time and resources
- Can be created as follow-up of a service notification
- Planning of service actions
 - Resource planning for internal and external employees
 - Determination of specific execution date
- Confirmation

Service Order - Content

- Customer information
- Information about the location
- Object information
- Information about planning and execution of activities
- Information about planned and actual costs
- Information about settlement of the actual costs

Agenda

- CS Organizational Structure
- CS Master Data
- CS Processes

Service Order - Process



Goods return and repair

- Return of a damaged good
- Receipt through goods return
- Repaired through customer service
- Billing

Goods return and repair - Process

