

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 2022
Global Bike

Level

Beginner

Focus

Sales and Distribution

Authors

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Version

4.2

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MOTIVATION

The data entry of the exercises for sales was reduced because much of the data already existed in the SAP system. The stored data, known as master data, simplifies the handling of business processes.

In the sales order process, you used master data that already existed in the system, such as customers, material (products that Global Bike sells) and conditions, to shorten the sales process.

In this case study you will create your own master data, e.g. 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. However, it is recommended.

NOTES

This case study uses the model company Global Bike.



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 Global Bike 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 (Sales Representative US East)
 Maria Diaz (Sales Person 1 US East)
 Matthias Dosch (Sales Person 2 US East)
 Sandeep Das (Warehouse Supervisor)
 Sergey Petrov (Warehouse Employee)
 Stephanie Bernard (AR Accountant)

You start the sales order process by creating a new business partner (BP) – called the *The Bike Zone* – in Orlando with the role “Customer”. 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.

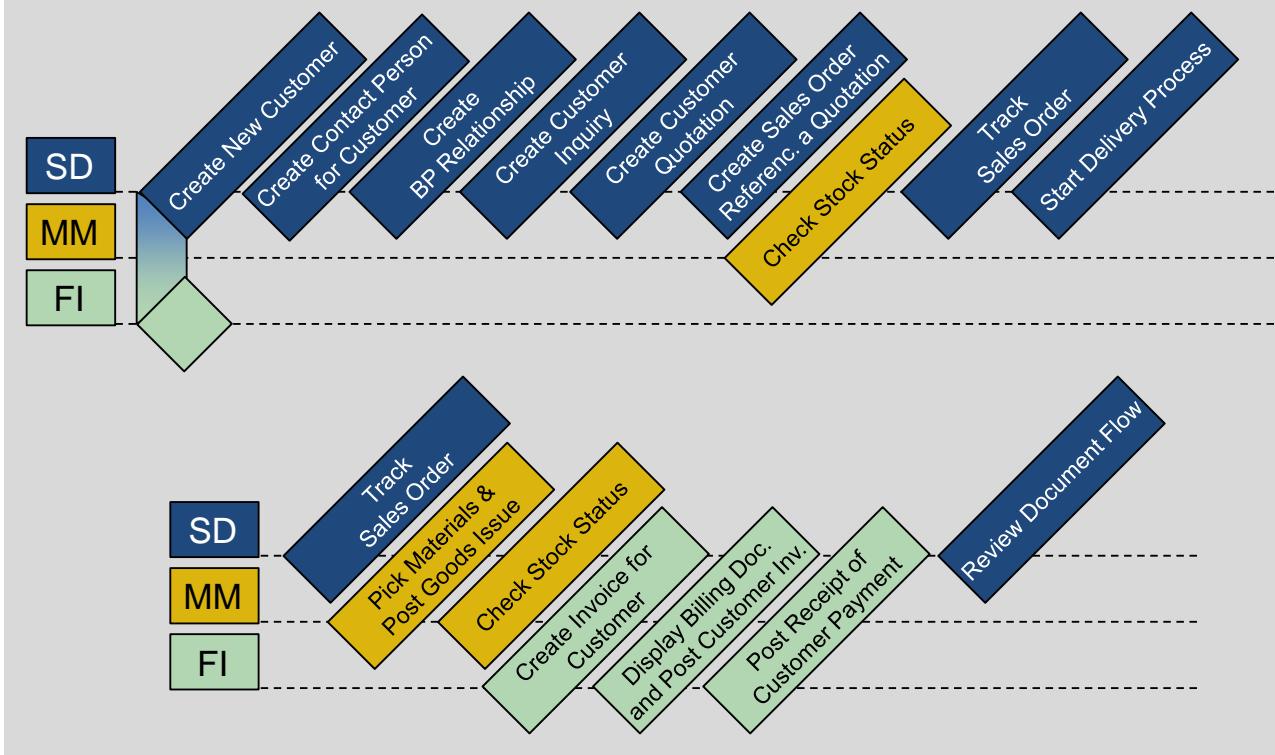


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Step 1: Create New Customer

Task Create a new customer.

Time 15 min

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

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

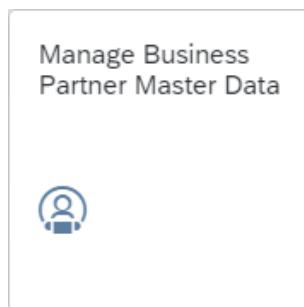
In this case study, we will create the master data for a new customer. Two types of customer data are stored about a customer – sales data and accounting data. The customer master data is created in three groups, or views – general, accounting, and sales. Customers can be created centrally, meaning that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

Scenario

For this task, central creation will be used to enter all of the needed data to define a new customer.

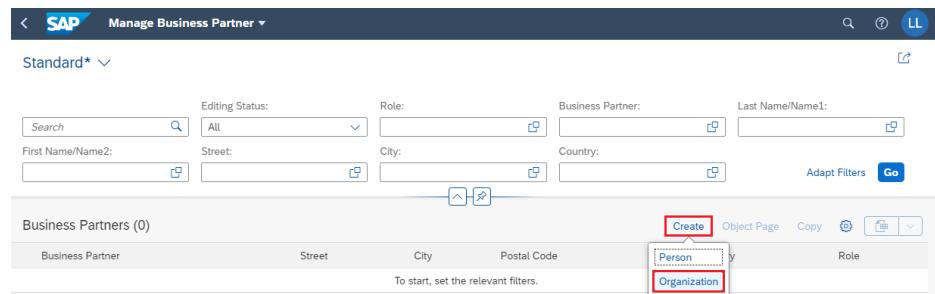
In the space *Sales and Distribution* in the role of *Sales Representative* use the app *Manage Business Partner Master Data* to create a new customer.

Manage Business Partner Master Data



On the *Manage Business Partner* screen, select the button **Create**. A submenu will open. Click **Organization** here.

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:

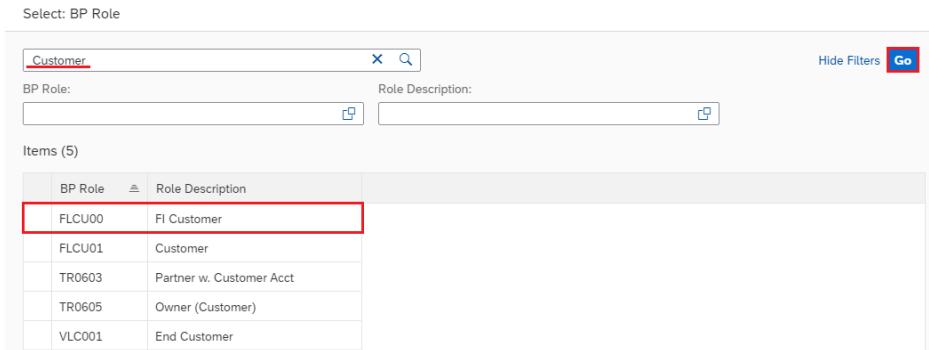
- An organisation represents entities such as a company (e.g. a legal entity), parts of a legal entity (e.g. a department) or an association.

"Organisation" is a generic term to represent any situation that may occur in daily business activities.

- A group represents a shared living arrangement, a married couple, or an executive board.

On the *Create Organization* screen, in the field *BP Role* click the input help icon . In the pop-up that opens, search for **Customer** and then select the entry **FLCU00 | FI Customer**.

Select: BP Role



BP Role	Role Description
FLCU00	FI Customer
FLCU01	Customer
TR0603	Partner w. Customer Acct
TR0605	Owner (Customer)
VLC001	End Customer

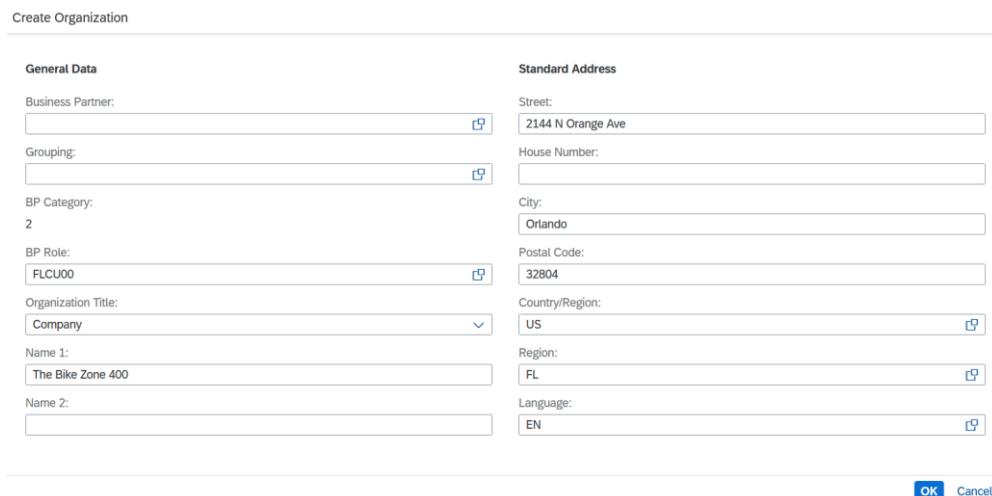
Customer

FLCU00 | FI Customer

Back on the *Create Organization* screen, please add the following information. As *Organization Title* choose **Company**, and as *Name 1* enter **The Bike Zone ###**. Remember to replace your three-digit number for **###**, e.g. if your number is 003, please enter 003. Further, as *Street* enter **2144 N Orange Ave**, and as *City* enter **Orlando** (with the *Postal Code* **32804**). In the field *Country*, please enter **US**, and choose **FL** as *Region*. Finally, for *Language* select **English**. Confirm your entries with .

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

Create Organization



Basic Data
###

A new overview is generated. Make sure that you have selected the *Basic Data* tab. In the *General Information* area, in the field *Search Term 1* add your three-digit number **###**.

[Basic Data](#) [▼](#) [Roles](#) [Address](#) [▼](#) [Address-Independent Communication](#) [▼](#) [Bank Acc](#)

General Information

Organization Title:	Name 4:
<input type="text" value="Company"/>	<input type="text"/>
Name 1:	Search Term 1:
<input type="text" value="The Bike Zone 400"/>	<input type="text" value="400"/>
Name 2:	Search Term 2:
<input type="text"/>	<input type="text"/>
Name 3:	Business Partner Type:
<input type="text"/>	<input type="text"/>

Then, select the *Roles* tab. Auto-scroll will take you to the correct position. You will see a line with the details of the business partner role as well as the validity dates. At the end of the line, click to maintain further details.

Roles

[Roles \(1\)](#) [Search](#) [Create](#) [Create with Reference](#) [Delete](#)

Business Partner Role	Valid From	Valid To
FLCU00	07/27/2023	12/31/9999

A new screen is loading. Select the *Company Codes* tab. Currently, there is no record maintained for the company codes, so please select .

Company Codes

[Company Codes](#)

Company Code	Reconciliation Account	Accounting Clerk	Payment Terms	Blocks
No data found.				

In the *Company Code* field, click the input help icon . The following pop-up window opens.

Select: Company Code

Company Code:	Company Name:	Currency:	Country Key:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Items (2)

Co...	Cou...	Company Name
DE00	DE	Global Bike Germany GmbH
US00	US	Global Bike Inc.

Click on **US00** (*Global Bike Inc.*). In the *Finance* area, as the *Reconciliation Account* enter **1200000** (*Trade Receivables*) and as the *Sort Key* choose **001** (*Posting Date*). In the field *Payment Term*, please add **0001** (*Payable immediately Due net*).

US00
1200000
001
0001

Finance

Accounting	Interest Calculation	Payment Data
Reconciliation Account: 12000000	Interest Indicator:	Payment Terms: Payable Immediately Due net (0001)
Head Office:	Calculated To: MM/dd/yyyy	Credit Memo Payment Terms:
Sort Key: Posting date (001)		Tolerance Group:

Select **Apply** to save the draft. You can save the customer role by clicking **Apply** once again afterwards.

Select the *Address* → *Address Details* tab. You will see one line with the country details as well as the validity dates. Click **>** to maintain more details.

Address Details

Address Details (1)

Address	Country/Region	Standard	Valid From	Valid To
<input checked="" type="radio"/>	US	Yes	07/27/2023	12/31/9999

In the *Address* area, you can use the button **Show More** to display all the fields. Please find the *Transportation Zone* field and click the input help icon **?**. The following pop-up window will open.

Select: Transportation Zone

Search		Hide Filters Go
Transportation Zone:	Description:	Country Key:
<input checked="" type="radio"/>		=US ?

Items (2)

Transportation Zone	Description
0000000001	Region East
0000000002	Region West

Click on **Region East** to select it. Finally, use the button **Apply** again to save your draft.

Address
Address Details

Transportation Zone

Region East

Note In the general role of the business partner, the name and address of the business partner are documented. The general role data is relevant for sales and for accounting. To avoid data redundancy, they are stored on a client-specific basis. They apply to all organizational units of a client.

To be able to add sales area data for the customer you have just created, you have to assign a new business partner role. For this purpose, select the *Roles* tab. There, choose **Create** again to create a new row for another Business Partner Role.

Roles

Roles (2)

Search			Create	Create with Reference	Delete				
Business Partner Role	Valid From	Valid To							
<input checked="" type="radio"/>	07/27/2023	12/31/9999	>						
<input type="radio"/>	FLCU00	07/27/2023	12/31/9999	>					

In the empty Business Partner Role field, click on the value help icon . In the pop-up, search for **Customer** and then select the entry **FLCU01 - Customer**.

Select: BP Role

BP Role	Role Description
FLCU00	FI Customer
FLCU01	Customer
TR0603	Partner w. Customer Acct
TR0605	Owner (Customer)
VLC001	End Customer

Customer
FLCU01 | Customer

At the end of the new line, you can click on  to maintain more details. Switch to the tab *Sales Areas* to maintain the sales area data of your customer. Since no data record currently exists, select the button  accordingly.

Sales Areas

Sales Organization	Distribution Channel	Division	Delivery Block	Billing Block	Order Block
--------------------	----------------------	----------	----------------	---------------	-------------

UE00
WH
BI

In the field Sales organisation click on the value help symbol . In the pop-up window that opens, enter **UE00** as the *sales organisation*, **WH (Wholesale)** as the distribution channel and **BI (Bicycles)** as the division. Then press .

Select: Sales Organization

Sal...	Di...	Di...	Sales Organization Description	Distribution Channel Description	Division Description
UE00	WH	BI	US East	Wholesale	Bicycles

US East

Click on **US East** to accept the entry. The fields will be filled accordingly in the General Data.

Then select the *Sales Area Details* tab. In the *Sales Orders* section, enter **US0001** as the *Sales District* and ensure that **USD** is entered as the *currency*.

Sales Area Details
US0001
USD

Sales Orders

PP Customer Procedure:	<input type="text"/>
Currency:*	(Internal) United States Dollar (5 Dec.) 
Exchange Rate Type:	<input type="text"/>
Sales District:	Pacific Northwest USA (US0001) 

In the **Billing** section, enter **FOB** (*Free on Board*) as the **Incoterms** and **Miami** as the **Incoterms Location 1**. Also add **0001** (*Payable immediately Due net*) as **Payment Terms**.

FOB
Miami
0001

Incoterms (abbreviation for **International Commercial Terms**) are internationally recognised terms of delivery published by the International Chamber of Commerce (ICC) for international trade law.

Incoterms

Billing

Invoice Dates:

Incoterms Version:

Incoterms:

Incoterms Location 1 ID:

Incoterms Location 1:

Payment Terms:

In the **Shipping area**, select **Normal item** from the drop-down list as the **Delivery Priority** and **Standard** as the **Shipping Conditions**. Add **MI00** (Miami) as the delivery plant.

Normal items
Standard
MI00

Shipping

Delivery Priority:

Delivery Plant:

Shipping Conditions:*

In the **Accounting** area, select **Domestic Revenue** as the *account assignment group* from the drop-down list. In the following area *Partial Deliveries* use the dropdown list in the field *Partial delivery per item* and thus select **Partial delivery allowed**. In the last area of this input screen, *Price Group*, use the drop-down list to select **Bulk Buyer** as the *Price Group* and enter **1 (standard)** as the *Customer Pricing Strategy*. Compare your entries with the following screenshots and confirm your entries with Enter.

Domestic Revenue

Partial delivery allowed

Bulk Buyer
1

Accounting

Account assignment group:

Domestic Revenues

Partial Deliveries

Partial Delivery Per Item:

Partial delivery allowed

Complete Delivery Required:

**Pricing and Statistics**

Price Group:

Bulk buyer

Customer Pricing Procedure: *

Standard (1)

Taxes
0

Then select the *Taxes* tab. Enter the tax classification **0** (no tax) for all three tax categories.

Taxes

Sales Area Taxes (3)

Country	Tax Category	Tax Classification	Search	Paste	...
US	UTX1	0	<input type="text"/>	<input type="button" value=""/>	<input type="button" value=">"/>
US	UTX2	0	<input type="text"/>	<input type="button" value=""/>	<input type="button" value=">"/>
US	UTX3	0	<input type="text"/>	<input type="button" value=""/>	<input type="button" value=">"/>

Select the button **Apply** to save your adjustments as a draft. Then press **Apply** to finish editing the client role. To finally save the business partner, press the button **Create**.

The SAP system creates the master data record for the new BP and assigns a unique business partner number. Make a note of the BP number, which you will find in the header.

The screenshot shows the SAP Fiori Business Partner application. At the top, there's a navigation bar with a back arrow, the SAP logo, and the text "Business Partner". Below this, there's a card for "The Bike Zone 400" with a building icon and the number "1003059".

Business Partner
Number (Customer)
.....

Click on **SAP** to return to the SAP Fiori Launchpad.



Step 2: Create Contact Person for Customer

Task Create a contact person for a customer.

Time 5 min

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

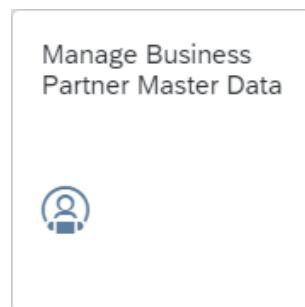
Name (Position) Maria Diaz (Sales Person 1 US East)

As you have created the master data for your new client (**The Bike Zone**), you can create the master data for a contact person. This contact person is an employee of the client company through whom Global Bike communicates with The Bike Zone.

Scenario

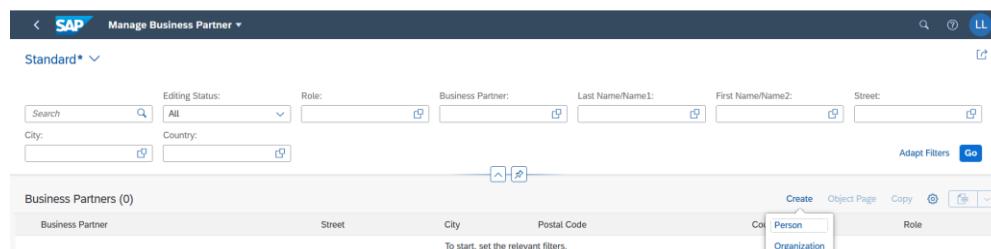
In the space *Sales and Distribution* in the role of *Sales Representative* use the app *Manage Business Partner Master Data* to create a contact person.

Manage Business Partner Master Data



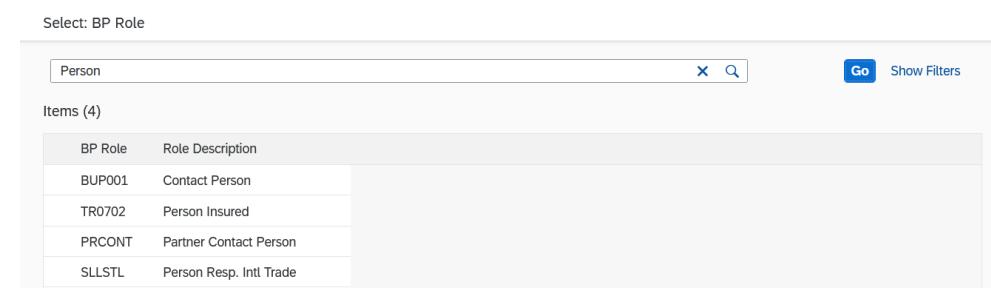
In the *Manage Business Partner* view, select the item . A submenu opens. Click here on *Person*.

Person



In *Create Person*, click the value help icon in the *BP Role* field. In the pop-up, search for **Person** and then select the entry **BUP001 | Contact Person**.

Person
BUP001 | Contact Person



Enter the **Person Title**, **First Name** and **Last Name** of your choice. Add your number (###) to the fictitious surname. This will make it easier for you to identify your entry later if persons with the same name have been created. Please enter **US** as the *Country/Region* and **EN** as the *Language*. Confirm your entries with **OK**.

Person Title
First Name
Last Name ###
US
EN

Create Person

General Data		Standard Address	
Business Partner:		Street:	
Grouping:		House Number:	
BP Category:	1	Postal Code:	
BP Role:	BUP001	City:	
Person Title:	Mr.	Country/Region:	US
First Name:	Max	Region:	
Last Name:	Mustermann 400	Language:	EN

OK **Cancel**

A new overview is generated. In the *General Information* section, add your three-digit number ### again in the *Search Term 1* field.

###

Basic Data **Roles** **Address** **Address-Independent Communication**

General Information

Person Title:	Mr.	Search Term 1:	400
First Name:	Max	Search Term 2:	
Last Name:	Mustermann 400	Business Partner Type:	

Click on **Create** to save your business partner. The SAP system creates the master data record for the new contact person and assigns a unique business partner number (header). Please make a note of this number.

< SAP Business Partner

Max Mustermann 400
1003060



Grouping: Internal number assignment (0001) Standard Address
Business Partner Category: Person (1) USA

BP Number (Contact Person)

Click on **SAP** to return to the SAP Fiori launchpad.



Step 3: Create BP Relationship

Task Create a BP relationship.

Time 5 min

Short Description Use the SAP Fiori Launchpad to maintain a Business Partner relationship.

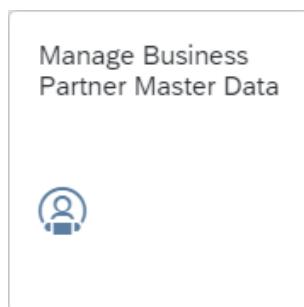
Name (Position) Maria Diaz (Sales Person 1 US East)

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

Scenario

In the space *Sales and Distribution* in the role of *Sales Person* use the *Manage Business Partner Master Data* app again to customise a business partner,

Manage Business Partner Master Data



In the *Manage Business Partner Master Data* view, enter your **Business Partner Number** (of Step 1) in the *Business Partner* field. Alternatively, you can enter **Orlando** as the *City* and ***###** as the *Last Name/Name 1*.

Business Partner Number (Customer)
(Orlando)
(*###)

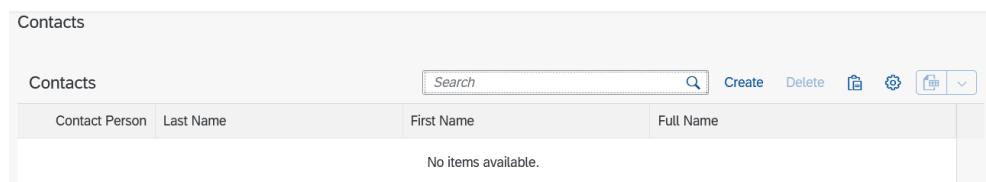
Then press the button **Go**. Your business partner should be displayed accordingly.

Business Partners (1)			Create	Object Page	Copy	Print	Export	Filter
Business Partner	City	Postal Code						
The Bike Zone 400 1003059	Orlando	32804	>					
Country/Region: US Role: FI Customer (FLCU00), Customer (FLCU01)								

Click on your Business Partner to display the Master Data record. Then press **Edit** in the upper area. The editing mode opens.

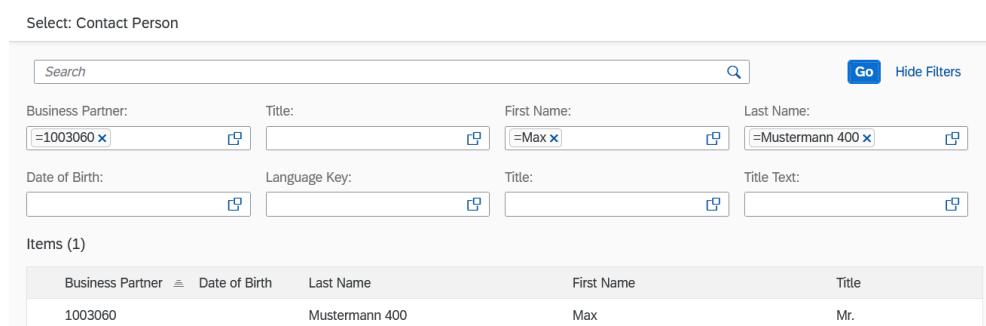
Select the *Contacts* tab. Click on  to create a new row in the Contacts section.

Contacts



In the *Contact Person* field, click on the value help icon . In the pop-up window that opens, enter the **Business Partner Number** of your contact person in the *Business Partner* field. Alternatively, you can also use the **First Name** and **Name**. Then press the button .

BP Number (Contact Person)
(First Name)
(Last Name)



Your business partner is displayed accordingly. Select it with one click to enter it as contact person for your customer (The Bike Zone). Click on  to apply your changes to the business partner.

Click on  to return to the SAP Fiori Launchpad.

Step 4: Create customer request

Task Create a customer inquiry.

Time 10 min

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

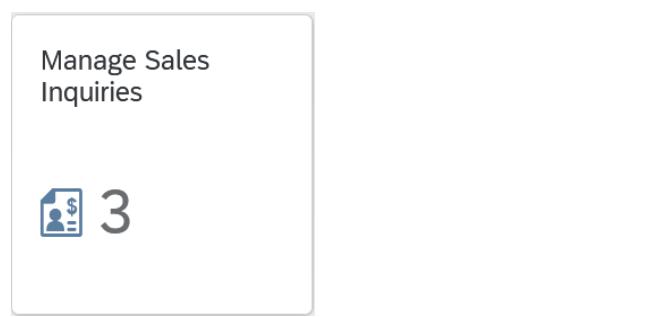
Name (Position) Matthias Dosch (Sales Person 2 US East)

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

Scenario
Inquiry

In the space *Sales and Distribution* in the role of *Sales Person*, use the *Manage Sales Inquiries* app to create an inquiry.

Manage Sales Inquiries



Note This dynamic Fiori app displays 3. This means that Global Bike currently has 3 different customer requests. The number you see depends on the number of requests that you and the other participants have created before. You will encounter this functionality in other apps as well.

If you want to display all existing sales inquiries, press **Go**. A list with all inquiries is displayed. If, on the other hand, you want to enter a new sale inquiry, click on **Create Inquiry**.

Enter the abbreviation **IN** (*Inquiry*) as the *Inquiry Type* and **UE00** (*US East*) as the *Sales Organization*. Also add **WH** (*Wholesale*) to the *Distribution Channel* field and **BI** (*Bicycles*) to the *Division*.

IN
UE00
WH
BI

*	Inquiry Type:	IN
Organizational Data		
Sales Organization:	UE00	
Distribution Channel:	WH	
Division:	BI	
Sales Office:		
Sales Group:		

Compare your entries with the screenshot above. Then select **Continue**, in the lower screen area, to be able to enter further data for the request. This will take you to the following screen.

SAP Create Inquiry: Overview

Display Do

Menu ▾

Inquiry: <input type="text"/>	Net Value: <input type="text" value="0.00"/>
Sold-to Party: <input type="text"/>	
Ship-to Party: <input type="text"/>	
Cust. Reference: <input type="text"/>	Cust. Ref. Date: <input type="text"/>

Sales Item Overview Item detail Ordering party Procurement Shipping Reason for rejection

Valid From: <input type="text"/>	Valid To: <input type="text"/>
* Req. Deliv.Date: <input type="radio"/> D <input type="radio"/> 07/27/2023	Expect.Ord.Val.: <input type="text" value="0.00"/>

All Items

Item	Material	Req. Segment	Order Quantity	SU	AltItm	Item Description
<input type="checkbox"/>						

In the *Sold-to party* field, enter the **Business Partner Number** of your customer **The Bike Zone**.

Business Partner
Number (Customer)

Note Alternatively, you can search for your GP number by selecting the input help icon  in the *Sold-To Party* field. As *Search Term* enter **###**, and as *City* enter **Orlando**. Confirm your entry with **enter** to run the search. Double click on the *The Bike Zone* line to add the GP to the request.

Orlando

Enter **###** as the *Customer Reference* and enter **today's date** in the fields *Customer reference date* and *Valid from* (F4, then Enter). For the *Valid To* and *Requested delivery date* fields, enter **one month from today**.

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

Create Inquiry: Overview

Menu Search In: "Apps"

Inquiry:	Net Value:
Sold-to Party:	1003059
Ship-to Party:	
Cust. Reference:	400
Cust. Ref. Date: 07/27/2023	
Sales Item Overview Item detail Ordering party Procurement Shipping Reason for rejection Valid From: 07/27/2023 Valid To: 08/27/2023 * Req. Deliv.Date: D 08/27/2023 Expect.Ord.Val.: 0.00	

The Bike Zone would like a quote for two products: The Deluxe Touring Bike (black) and the Professional Touring Bike (black). To find these products, use the search function. Click in the *Material* field and then click on the value help icon .

On the *Material by Description* Tab, enter ***Bike*** as the *Material Description* and ***###** (e.g. *003 if your number is 003) as the *Material*.

Bike
***###**

Restrict Value Range (1)

Search and Select

M: Material by description

Material description: *Bike*	Language Key: EN	Material: *400
------------------------------	------------------	----------------

Go Hide Filters

Then click on to start the search process. You will get results whose material short text contains "Bike" and whose abbreviation ends in "###".

Restrict Value Range (1)

Search and Select

M: Material by description

Material description: *Bike*	Language Key: EN	Material: *400
------------------------------	------------------	----------------

Go Hide Filters

Items (19)

Material description	Langu...	Material
DELUXE GPS-BIKE COMPUTER CARMINE RED	EN	DGRR2400
DELUXE GPS-BIKE COMPUTER ROYAL BLUE	EN	DGRB2400
DELUXE GPS-BIKE COMPUTER SILVER WHITE	EN	DGRW2400
DELUXE TOURING BIKE (BLACK)	EN	DXTR1400
DELUXE TOURING BIKE (RED)	EN	DXTR3400
DELUXE TOURING BIKE (SILVER)	EN	DXTR2400
GLOBAL BIKE ENERGY (BLUE)	EN	GBEN1400
GLOBAL BIKE ENERGY (RED)	EN	GBEN2400
GPS-BIKE COMPUTER ROAD 64GB CARMINE RED	EN	GRRL2400
GPS-BIKE COMPUTER ROAD 64GB ROYAL BLUE	EN	GRBL2400
GPS-BIKE COMPUTER ROAD 64GB SILVER WHITE	EN	GRWL2400
MEN'S OFF ROAD BIKE	EN	ORMN1400
OFF ROAD BIKE COMPUTER	EN	ORBC1400

OK Cancel

Double click on the **Deluxe Touring Bike (Black)** to select it. In the following screen, enter an *Order Quantity* of **5**.

DXTR1##
5

All Items

	Item	Material	Req. Segment	Order Quantity
<input type="checkbox"/>		DXTR1400		5

Repeat the process for the second item, searching for **Professional Touring Bike (Black)** as the *Material* and entering an *Order Quantity* of **2**. Select Enter to determine the price for this request. Confirm the message that appears.

PRTR1###
2

The screenshot shows the SAP Create Inquiry: Overview screen. At the top, there is a search bar with the placeholder "Search In: 'Apps'". Below the search bar, there are several buttons for filtering and sorting. The main area displays a table of items:

	Item	Material	Req. Segment	Order Quantity	SU	Altitm	Item Description
<input type="checkbox"/>	10	DXTR1400		5	EA		Deluxe Touring Bike (black)
<input type="checkbox"/>	20	PRTR1400		2	EA		Professional Touring Bike (black)

Below the table, there are sections for Sales General Sales Data and Item Overview. The Sales section includes fields for Valid From (07/27/2023), Valid To (08/27/2023), and *Req. Deliv.Date (D). The Item Overview section includes fields for Expect.Ord.Val. (0.00 USD) and Grouping buttons.

The total price for these 7 bicycles for The Bike Zone is 21,400.00 USD (net value). The expected order value is a calculated value that multiplies the net value of the order quantity by the probability that a request from this customer will result in an actual order. Select both items and click on .

The screenshot shows the SAP Create Inquiry: Overview screen with the "Display Item Details" button selected. The table now shows the selected items highlighted:

	Item	Material	Req. Segment	Order Quantity	SU	Altitm	Item Description
<input checked="" type="checkbox"/>	10	DXTR1100		5	EA		Deluxe Touring Bike (black)
<input checked="" type="checkbox"/>	20	PRTR1100		2	EA		Professional Touring Bike (black)

In the lower area of the *General Sales Data* you will find the field *Order Probability*. This expresses the percentage probability that an enquiry or quotation item will result in a sales order. Assuming this order probability would be 30%, the expected order value would be $0.30 \times 21,400.00$ USD = 6,420.00 USD.

Changing the order probabilities may make sense because different requests from customers have different probabilities. Change the *Order Probability* for the material DXTR### to 70%. Then click on (Next item) in the upper area to go to material PRTR1###.

70

Create Inquiry: Item Data

Sales Document Item: 10 Item Category: AFN Search In: "Apps"

Material: DXTR1400 Deluxe Touring Bike (black)

Sales A Sales B Shipping Billing Document Conditions Account Assignment Schedule lines Partner

Order Quantity and Delivery Date

Order Quantity: 5 EA 1 EA 1 EA
 First Delivery Date: D 08/27/2023 Requirement Segment

General Sales Data

Net Value: 15,000.00 USD Exch. Rate: 1.00000
 Pricing Date: 07/27/2023
 Material Entered: DXTR1400
 EAN/UPC:
 Engineering Change:
 Usage:
 Reason for Rejection:
 Order Probability: 70 Alternative to Item:

Also enter an **Order Probability** of **70%** there. Confirm your change with Enter. Click on **<** (Back) to update the request and note the new expected order value of 14,980.00

70

Item Overview

Valid From: 07/27/2023 Valid To: 08/27/2023
 * Req. Deliv.Date: D 08/27/2023 Expect.Ord.Val.: 14,980.00 USD

All Items

Item	Material	Req. Segment	Order Quantity	SU	AltItm	Item Description
10	DXTR1400		5	EA		Deluxe Touring Bike (black)
20	PRTR1400		2	EA		Professional Touring Bike (black)

Click on **Save** to save the request. The SAP system will assign a unique number to the request. Make a note of it.

Inquiry Number: **10000001**

Click on **SAP** to return to the SAP Fiori launchpad.

Step 5: Create Customer Quotation

Task Create a customer quotation.

Time 10 min

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

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

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.

Quotation

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. To do this, in the space *Sales and Distribution* and in the role of *Sales Representative*, use the *Manage Sales Quotations* app.

Scenario

Start



If you want to display all sales quotations, click **Go**. A list will be displayed accordingly. On the other hand, if you want to create a new sales quotation, click **Create Quotation**.

In the *Quotation Type* field, please enter the code **QT** (*Quotation*). In the lower screen area, click **Create with Reference**. In the *Create with Reference* pop-up that opens, you can search your inquiry and thus, copy the data into the quotation. For this purpose, make sure that the *Inquiry* tab is selected. In the *Inquiry* field, enter your **inquiry number**.

QT

Inquiry
Inquiry Number

Note Alternatively, if you have forgotten your inquiry number, in the *Inquiry* field click the input help icon . In the *Sales document according to customer PO number* tab, as *Customer Reference* enter your number (###).

###

 A screenshot of the SAP Fiori interface for creating a sales quotation. At the top, it says "Sales Document (1)". Below that is a section titled "Search and Select" with a dropdown menu labeled "A: Sales document according to customer PO number". At the bottom, there are fields for "Customer Reference" (containing "400") and "Sales Organization" (containing "UE00").

Then click **Go** and double-click your order. Your inquiry number will be copied to the *Create with Reference* window accordingly.

Inquiry	Quotation	Order	Contract	SchedAgree	BillDoc
Inquiry:	<input type="text" value="10000001"/>				
Requested Deliv.Date:	<input type="text"/> <input type="text"/>				

Click  **Copy** to copy the information from the inquiry to the quote screen. This will produce the following screen.

As *Cust. Reference* enter again ### and as *Cust. Ref. Date* type in **today's date**. In the *Valid To* field, please add **one month from today**. Check if the *Req. Deliv. Date* is set to **one month from today**.

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

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  (*Item Conditions*). You will get a screen that shows the pricing details for your Deluxe Touring Bike.

All Items		Item	Material	Req. Segment	Order Quantity	SU	Altitm	Item Description
<input checked="" type="checkbox"/>	10	DXTTR1400				5	EA	Deluxe Touring Bike (black)
<input type="checkbox"/>	20	PRTTR1400				2	EA	Professional Touring Bike (bla

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.

K004
50

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

Pricing Elements

I...	CnTy	Description	Amount	Crcy	per	UoM	Condition Value	Curr.
<input type="checkbox"/>	PR00	Price	3,000.00	USD	1	EA	15,000.00	USD
<input type="checkbox"/>		Gross Value	3,000.00	USD	1	EA	15,000.00	USD
<input type="checkbox"/>		Discount Amount	0.00	USD	1	EA	0.00	USD
<input type="checkbox"/>		Rebate Basis	3,000.00	USD	1	EA	15,000.00	USD
<input type="checkbox"/>		Net Value for Item	3,000.00	USD	1	EA	15,000.00	USD
<input type="checkbox"/>		Net Value 2	3,000.00	USD	1	EA	15,000.00	USD
<input type="checkbox"/>		Total	3,000.00	USD	1	EA	15,000.00	USD
<input type="checkbox"/>	SKTO	Cash Discount	0.000	%			0.00	USD
<input type="checkbox"/>	VPRS	Internal price	1,400.00	USD	1	EA	7,000.00	USD
<input type="checkbox"/>		Standard - USA /With Jur....	1,600.00	USD	1	EA	8,000.00	USD
<input type="checkbox"/>	K004		50					

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

Pricing Elements

I...	CnTy	Description	Amount	Crcy	per	UoM	Condition Value	Curr.
<input type="checkbox"/>	PR00	Price	3,000.00	USD	1	EA	15,000.00	USD
<input type="checkbox"/>		Gross Value	3,000.00	USD	1	EA	15,000.00	USD
<input type="checkbox"/>	K004	Material	50.00-	USD	1	EA	250.00-	USD
<input type="checkbox"/>		Discount Amount	50.00-	USD	1	EA	250.00-	USD
<input type="checkbox"/>		Rebate Basis	2,950.00	USD	1	EA	14,750.00	USD
<input type="checkbox"/>		Net Value for Item	2,950.00	USD	1	EA	14,750.00	USD
<input type="checkbox"/>		Net Value 2	2,950.00	USD	1	EA	14,750.00	USD
<input type="checkbox"/>		Total	2,950.00	USD	1	EA	14,750.00	USD
<input type="checkbox"/>	SKTO	Cash Discount	0.000	%			0.00	USD
<input type="checkbox"/>	VPRS	Internal price	1,400.00	USD	1	EA	7,000.00	USD
<input type="checkbox"/>		Standard - USA /With Jur....	1,550.00	USD	1	EA	7,750.00	USD

Note that the discount is now applied to the order. Click return to the main quotation screen. To apply a 5% discount to the entire order, follow the pull-down menu path: **Menu ▶ Goto ▶ Header ▶ Conditions**

To apply the 5% discount, enter **RA00** with an amount of **5**. Confirm your entries and note that the price does not yet include the 5% discount.

RA00
5

Pricing Elements

I...	CnTy	Description	Amount	Crcy	per	UoM	Condition Value	Curr.
<input type="checkbox"/>	PR00	Price					21,400.00	USD
<input type="checkbox"/>		Gross Value					21,400.00	USD
<input type="checkbox"/>	K004	Material					250.00-	USD
<input type="checkbox"/>	RA00	% Discount from Net	5.000-	%			0.00	USD
<input type="checkbox"/>		Discount Amount					250.00-	USD
<input type="checkbox"/>		Rebate Basis					21,150.00	USD
<input type="checkbox"/>		Net Value for Item					21,150.00	USD
<input type="checkbox"/>		Net Value 2					21,150.00	USD
<input type="checkbox"/>		Total					21,150.00	USD
<input type="checkbox"/>	SKTO	Cash Discount					0.00	USD
<input type="checkbox"/>	VPRS	Internal price					10,000.00	USD
<input type="checkbox"/>		Standard - USA /With Jur....					11,150.00	USD

To include the 5% discount, click . The 5% discount is now applied. Note that it is applied to the price **after** the \$50 discount per Deluxe Touring bike.

Pricing Elements

I...	CnTy	Description	Amount	Crcy	per	UoM	Condition Value	Curr.
<input type="checkbox"/>	<input checked="" type="checkbox"/> PR00	Price					21,400.00	USD
<input type="checkbox"/>		Gross Value					21,400.00	USD
<input type="checkbox"/>	<input checked="" type="checkbox"/> K004	Material					250.00-	USD
<input type="checkbox"/>	<input checked="" type="checkbox"/> RA00	% Discount from Net	5.000-	%			1,057.50-	USD
<input type="checkbox"/>		Discount Amount					1,307.50-	USD
<input type="checkbox"/>		Rebate Basis					20,092.50	USD
<input type="checkbox"/>		Net Value for Item					20,092.50	USD
<input type="checkbox"/>		Net Value 2					20,092.50	USD
<input type="checkbox"/>		Total					20,092.50	USD
<input type="checkbox"/>	<input checked="" type="checkbox"/> SKTO	Cash Discount					0.00	USD
<input type="checkbox"/>	<input checked="" type="checkbox"/> VPRS	Internal price					10,000.00	USD
<input type="checkbox"/>		Standard - USA /With Jur....					10,092.50	USD

Click on  to save the new quotation. The following success message appears. Please write down your quotation number.

Quotation Number _____

 Quotation 20000002 has been saved.

Click on  to return to the SAP Fiori launchpad.



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.

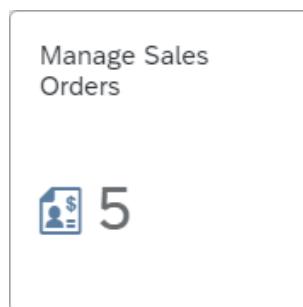
Name (Position) David Lopez (Sales Representative US East)

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.

Scenario

In the space *Sales and Distribution* and in the role of *Sales Representative*, you can use the *Manage Sales Orders* app to create a sales order.

Start



If you want to display all sales orders, click **Go**. A list will be displayed accordingly. If you want to create a customer order for the accepted offer, follow the following pull-down menu path:

Create ► Create Sales Order VA01.

A screenshot of the SAP Fiori 'Manage Sales Orders' application. At the top, there's a search bar with a magnifying glass icon and a dropdown menu labeled 'Standard'. Below the search bar are several filter fields: 'Sales Order', 'Sold-to Party', 'Customer Reference', 'Requested Delivery Date', 'Overall Status', and 'Document Date'. To the right of these fields are buttons for 'Go' and 'Adapt Filters'. Below the filters, a table displays 'Sales Orders (7)'. The table has columns for 'Sales Order', 'Sold-to Party', 'Customer Reference', 'Net Value', and 'Status'. One row is selected, showing 'Create Sales Order VA01' under 'Customer Reference' and '25,000.00 USD' under 'Net Value'.

On the *Create Sales Documents* screen, in the *Order Type* field, please enter the code **OR1** (*Standard order*). In the lower screen area, click on the **Create with Reference** button. In the *Create with Reference* pop-up that opens, you can search your quotation and thus, copy the data into the order. For this purpose, make sure that the *Quotation* tab is selected. In the *Quot.* field, enter your **quotation number**.

OR1

Quotation
Quotation Number

Note Alternatively, if you have forgotten your quotation number, in the *Quot.* field click the input help icon . In the *Sales document according to customer PO number* tab, as *Customer Reference* enter your number (###).

###

Sales Document (1)

Search and Select

A: Sales document according to customer PO number ▾

Customer Reference:	Sales Organization:
400	UE00

Then click  and double-click your order. Your quotation number will be copied to the *Create with Reference* window accordingly.

Create with Reference

Inquiry	Quotation	Order	Contract	SchedAgree	BillDoc
Quot.: 20000001					
Requested Deliv.Date: <input type="text"/>					

Click  to copy the information from the quotation to the sales order screen. Due to the discounts granted in the offer, please note the *Net Value* has been reduced.

< SAP Create Standard order: Overview

Standard order: <input type="text"/>	Net Value: 20,092.50 USD																							
Sold-to Party: 1003059 Company The Bike Zone 400, 2144 N Orange Ave, Orlando FL 32804, USA																								
Ship-to Party: 1003059 Company The Bike Zone 400, 2144 N Orange Ave, Orlando FL 32804, USA																								
Cust. Reference: <input type="text"/>	Cust. Ref. Date: <input type="text"/>																							
<table border="1"> <tr> <th>Sales</th> <th>Item Overview</th> <th>Item detail</th> <th>Ordering party</th> <th>Procurement</th> <th>Shipping</th> <th>Reason for rejection</th> </tr> <tr> <td>* Req. Deliv.Date: <input type="text"/> 08/27/2023</td> <td>Deliver.Plant: <input type="text"/></td> </tr> <tr> <td>Complete Dlv.: <input type="checkbox"/></td> <td>Total Weight: 57,170 G</td> </tr> <tr> <td>Delivery Block: <input type="text"/></td> <td>Volume: 0.000</td> </tr> <tr> <td>Billing Block: <input type="text"/></td> <td>Pricing Date: 07/27/2023</td> </tr> <tr> <td>Pty Terms: 0001 Pay immediately w/o deduction</td> <td></td> </tr> <tr> <td>Inco. Version: <input type="text"/></td> <td></td> </tr> <tr> <td>Incoterms FOB</td> <td></td> </tr> <tr> <td>Inc. Location1: Miami</td> <td></td> </tr> </table>		Sales	Item Overview	Item detail	Ordering party	Procurement	Shipping	Reason for rejection	* Req. Deliv.Date: <input type="text"/> 08/27/2023	Deliver.Plant: <input type="text"/>	Complete Dlv.: <input type="checkbox"/>	Total Weight: 57,170 G	Delivery Block: <input type="text"/>	Volume: 0.000	Billing Block: <input type="text"/>	Pricing Date: 07/27/2023	Pty Terms: 0001 Pay immediately w/o deduction		Inco. Version: <input type="text"/>		Incoterms FOB		Inc. Location1: Miami	
Sales	Item Overview	Item detail	Ordering party	Procurement	Shipping	Reason for rejection																		
* Req. Deliv.Date: <input type="text"/> 08/27/2023	Deliver.Plant: <input type="text"/>																							
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Pty Terms: 0001 Pay immediately w/o deduction																								
Inco. Version: <input type="text"/>																								
Incoterms FOB																								
Inc. Location1: Miami																								
<input type="button"/>																								

As *Customer Reference* enter again ### and as *Customer Reference Date* type in **today's date**. Please note that the *Requested Delivery Date* has been copied from the quotation. Click  and write down the number of your sales order.

today's dateStandard Order Number
.....

 Standard order 8 has been saved.

Click on  to return to the SAP Fiori launchpad.



Step 7: Check Stock Status

Task Check the inventory.

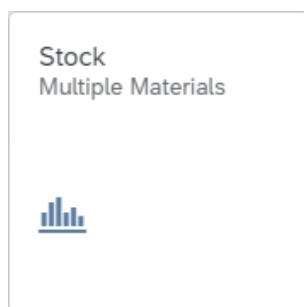
Time 5 min

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

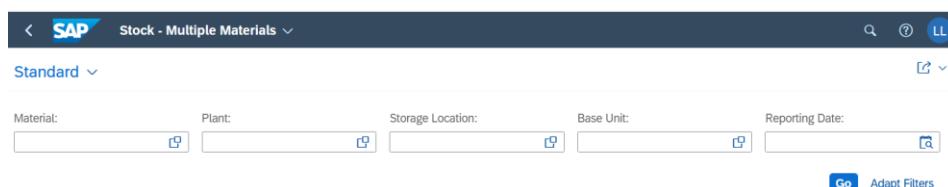
Name (Position) David Lopez (Sales Representative US East)

We can check on the inventory level of the bikes in the sales order for The Bike Zone. For this purpose, in the space *Sales and Distribution* and in the role of *Sales Representative*, you can use the *Stock – Multiple Materials* app.

Start



You will see the default screen of the app. Due to the high amount of materials, it is not recommended to search without further restrictions. Therefore, in the *Material* field, please use the input help icon



In the pop-up that opens, as *Description* enter ***TOURING*** and as *Material* type in your number (***###**).

TOURING
***###**



Click to run the search and to generate a result list of all “touring” bikes containing your number “###” in the material code. Select the **Deluxe Touring Bike (black)** and the **Professional Touring Bike (black)**. To copy your selection to the initial screen, click on the button.

Items (18)

<input type="checkbox"/>	Description	Language	Material
<input checked="" type="checkbox"/>	DELUXE TOURING BIKE (BLACK)	EN	DXTR1400
<input type="checkbox"/>	DELUXE TOURING BIKE (SILVER)	EN	DXTR2400
<input type="checkbox"/>	DELUXE TOURING BIKE (RED)	EN	DXTR3400
<input type="checkbox"/>	400 PRODUCT GROUP DELUXE TOURING	EN	PG-DXTR400
<input type="checkbox"/>	400 PRODUCT GROUP PROFESSIONAL...	EN	PG-PRTR400
<input type="checkbox"/>	400 PRODUCT GROUP TOURING	EN	PG-TRBK400
<input checked="" type="checkbox"/>	PROFESSIONAL TOURING BIKE (BLACK)	EN	PRTR1400

Back in the Stock – *Multiple Materials* overview, as *Plant* enter **MI00 (Miami)** and as *Storage Location* type in **FG00 (Finished Goods)**. Click **Go** to display the corresponding stock levels.

MI00
FG00

Materials (2)

Material	Material Description	Pla	Plant Name	Storage ...	Description of Storage Lo...
PRTR1400	Professional Touring Bike (black)	MI00	DC Miami	FG00	Finished Goods
DXTR1400	Deluxe Touring Bike (black)	MI00	DC Miami	FG00	Finished Goods

This report shows the stock levels for the plant in Miami. Scroll to the right to see the unrestricted stock.

Unrestricted Stock		
80	EA	
100	EA	
180	EA	

Click on **SAP** to return to the SAP Fiori launchpad.



Step 8: Track Sales Order

Task Track the processing status of the sales order.

Time 5 min

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

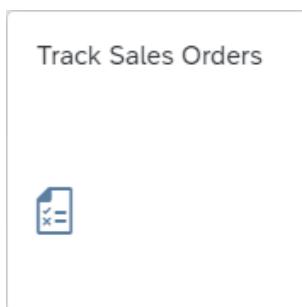
Name (Position) David Lopez (Sales Representative US East)

With relatively little user input, the sales order for The Bike Zone has been created. The *Track Sales Orders* app provides the opportunity to review the order in detail.

Scenario

To display and track a sales order, in the space *Sales and Distribution* and in the role of *Sales Representative*, please use the *Track Sales Orders* app.

Start



You will see the standard view of the app. In the *Search* field, enter your number (###) and click **Go** to run the search process.

###

The screenshot shows the SAP Fiori Launchpad with the "Track Sales Orders" app card. The card has a title "Track Sales Orders" and a small icon. Below the card, there are several search fields for Sales Document, Sold-to Party, Customer Reference, Requested Delivery Date, Overall Status, and Document Date. There are also buttons for "Go" and "Adapt Filters (1)".

Your order will be displayed in the result list. There you can already see first details like the *Overall Fulfillment* status or the *Net Value*.

Sales Documents (1) Standard					
		Create	Reject All Items	Set Delivery Block	Remove Delivery Block
		Set Billing Block	Remove Billing Block		
<input type="checkbox"/>	Sales Document	Overall Fulfillment	Process Phase	Requested Deliver...	Net Value
<input checked="" type="checkbox"/>	8		Order Processing	08/27/2023	20,092.50 USD >

Please click on the line containing your sales order. You will be forwarded to the *Track Sales Order Details* screen, where you can see all the details of the order.

The screenshot shows the SAP Fiori application 'Track Sales Order Details'. On the left, a sidebar displays 'Fulfillment Standard order 8' with details: Delivery Not Started / Not Relevant for Invoicing, Net Value: 20,092.50 USD, and Requested Delivery Date: 08/27/2023. The main area shows a process flow diagram with three steps: Quotation Processing, Order Processing, and Delivery Processing. Under 'Quotation Processing', there is a box for 'Quotation 20000001' which is 'Fully Referenced' and valid until 08/27/2023. Under 'Order Processing', there is a box for 'Standard order 8' which is 'Open' and has a 'Requested Delivery On 08/27/2023 Not Shipped'. Under 'Delivery Processing', there is a box for 'Planned Delivery' with 'Delivery Planned For 08/19/2023'.

For example, you can see that the quotation processing has been fully processed (“fully referenced”), but that the processing of the standard order is currently still “open”. You can also see the requested delivery date of the order and the planned delivery in the overview.

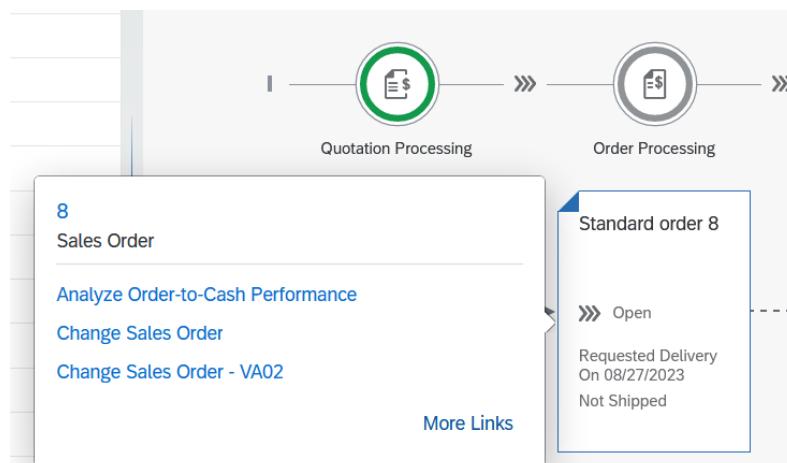
Afterward, please click on the *Items* tab. There you will see a list of the ordered bikes and the quantity shipped or already invoiced.

Items

Item Processing Details (2) Standard					
Item	Product	Order Quantity	Shipped Quantity		
10	Deluxe Touring Bike (black) (DXTR1400)	5 EA	0 EA	>	
20	Professional Touring Bike (black) (PRTR1400)	2 EA	0 EA	>	

Go back to the *Process Flow* tab and click on your Standard Order. The following context menu opens.

Process Flow



Choose **More Links**, and in the pop-up that opens, please select the entry *Display Sales Order - VA03*. You will be forwarded to the corresponding app.

In the *All Items* section, select the line with the Professional Touring Bike and click  (*Display Availability*) to check availability in detail.

SAP Availability Overview

Search In: "Apps"

Menu ▾ Stock Overview Stock in Detail Totals Overview Totals in Detail Scope of check

Material: PRT1400

Professional Touring Bike (black)

Plant: MI00 Avail. check: 02 Check.rule: A

MRP Area: MI00 With reqmts qtys:

End lead time: 08/02/2023

Base Unit: EA

Totals display

Receipts:	80	Confrmd issues:	0
Issues:	0		

ATP situation

Date	MRP e...	Stock Segment	MRP element data	Rec./reqd qty
<input type="checkbox"/> 07/28/2023	Stock			80
<input type="checkbox"/> 08/02/2023	----->		End lead time	
<input type="checkbox"/> 08/21/2023	CusOrd		Totals record	2
<input type="checkbox"/> 07/28/2023	SLocSt		FG00	80

The *Availability Overview* screen shows that, in this case, there are actually 80 bikes in stock and the order you are displaying will use 2 of these.

Note Your ATP situation could show other inventory quantities.

Choose **Scope of check**. If this button is not displayed, you will find the entry in the pull-down menu under: **Menu ▶ Goto ▶ Display scope of check**. The following screen will be displayed.

Display Scope of Check

Availability Check: 02 Individ. RequirementChecking Rule: A SD order

Stocks

- With Safety Stock
- With Stock in Transfer
- With Quality Inspection Stock
- With Blocked Stock
- With Restricted-Use Stock

Future Supply

 With Purchase RequisitionsWith Purchase Orders: X Include (for STO, use order quantity) With Shipping NotificationsWith Planned Orders: Exclude With Production Orders: Exclude

This screen displays the elements considered when performing the availability check. For example, *With Purchase Orders* is selected, which means that a purchase order will be considered as available stock from its receipt date onward. Click  to close the pop-up window and click  to return to the appointment order overview.

Select the Deluxe Touring Bike and click  (*Item Conditions*) to view the conditions again. Note that the two discounts have been manually applied to this item.

Pricing Elements

I...	CnTy	Description	Amount	Crcy	per	UoM	Condition Value	Curr.
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PR00 Price	3,000.00	USD	1	EA	15,000.00	USD
<input type="checkbox"/>		Gross Value	3,000.00	USD	1	EA	15,000.00	USD
<input type="checkbox"/>	<input checked="" type="checkbox"/>	K004 Material	50.00-	USD	1	EA	250.00-	USD
<input type="checkbox"/>	<input checked="" type="checkbox"/>	RA00 % Discount from Net	5.000-	%			737.50-	USD
		Discount Amount	197.50-	USD	1	EA	987.50-	USD
		Rebate Basis	2,802.50	USD	1	EA	14,012.50	USD
		Net Value for Item	2,802.50	USD	1	EA	14,012.50	USD
		Net Value 2	2,802.50	USD	1	EA	14,012.50	USD
		Total	2,802.50	USD	1	EA	14,012.50	USD
<input type="checkbox"/>	<input checked="" type="checkbox"/>	SKTO Cash Discount	0.000	%			0.00	USD
<input type="checkbox"/>	<input checked="" type="checkbox"/>	VPRS Internal price	1,400.00	USD	1	EA	7,000.00	USD
<input type="checkbox"/>		Standard - USA /With	1,402.50	USD	1	EA	7,012.50	USD

Click on  to return to the SAP Fiori launchpad.



Step 9: Start Delivery Process

Task Start the delivery process.

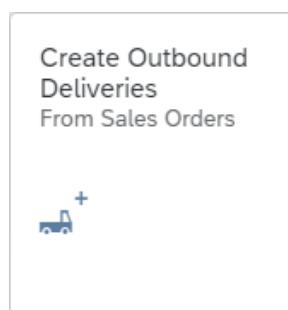
Time 5 min

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

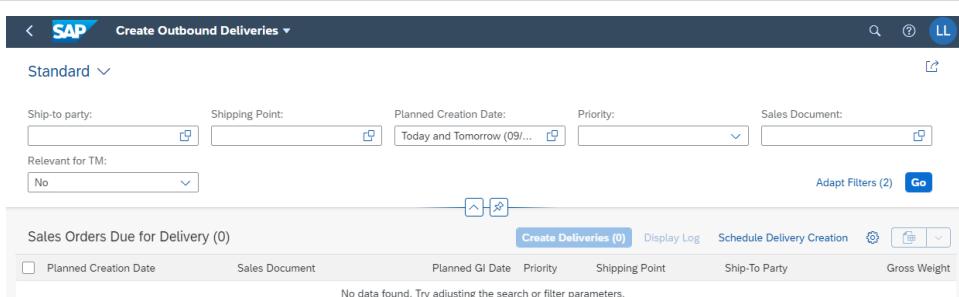
Name (Position) Sergey Petrov (Warehouse Employee)

To start the process that will fulfill The Bike Zone's order, we need to create a delivery document. To do this, in the space *Sales and Distribution* and in the role of *Warehouse employee*, use the *Create Outbound Deliveries – From Sales Orders* app.

Start



Note The app starts with a collapsed header area. Please expand it by clicking (*Expand Header*).



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.

Shipping Point

On the *Create Outbound Deliveries* screen, in the *Ship-to party* field please enter your business partner number (The Bike Zone).

Business Partner Number (Customer)

Note Alternatively, you can search for your GP number by selecting the input help icon in the *Ship-to party* field. A pop-up screen will open. As *Name 1* enter *###, and as *City* enter **Orlando**. Click **Go** to run the search.

*###
Orlando

Ship-to Party

[Search and Select](#) [Define Conditions](#)

Customer: Name 1: *400 Name 2: Country/Region:

City: Street: Postal Code: [Show All Filters](#)

Items (1)

Customer	Name 1	Name 2	Country/Region	City
1003059	The Bike Zone 400		US	Orlando

Select your customer and apply the entry to the initial screen by clicking **OK**.

In addition, as *Shipping Point* please enter **MIO0**, and remove the *Planned Creation Date*. Click **Go** to run the search. The sales order will be displayed.

MIO0

SAP Create Outbound Deliveries

Standard*

Ship-to Party: Shipping Point: Planned Creation Date: Priority: Sales Document:

The Bike Zone 4... SP Miami (MIO0) [Go](#) Adapt Filters (3)

Relevant for TM: No [Enter](#)

Sales Orders Due for Delivery (1) [Create Deliveries \(0\)](#) [Display Log](#) [Schedule Delivery Creation](#)

Planned Creatio...	Sales Document	Planned Gi Date	Priority	Shipping Point
08/19/2023	8	08/25/2023	Normal item (02)	SP Miami (MIO0)

Select the sales document and choose the button **Create Deliveries (1)**. You will see that the sales document is no longer available. Additionally, you will receive a confirmation that your outbound delivery has been created.

Click on **SAP** to return to the SAP Fiori launchpad.

Step 10: Track Sales Order

Task Track the processing status of the sales order.

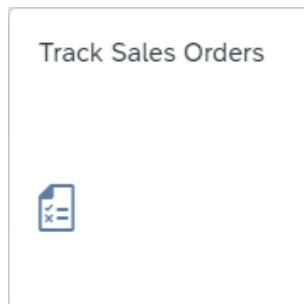
Time 5 min

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

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

To display and track a sales order, in the space *Sales and Distribution* and in the role of *Sales Representative*, use the *Track Sales Orders* app again.

Start



You will see the standard view of the app. In the *Search* field, enter your number (###) and click **Go** to run the search process.

###

The screenshot shows the SAP Fiori Launchpad with the "Track Sales Orders" app card. The card has a title "Track Sales Orders" and a small icon. Below the card, there is a search bar with placeholder text "400" and a "Go" button. Other filter options like "Overall Status" and "Document Date" are also visible.

Your order will be displayed in the result list. You can now see changes from the previous state. The *Overall Fulfillment* is now set to *Partially processed* and the *Order Processing* is *completely processed*.

Sales Documents (1) Standard		Create	Reject All Items	Set Delivery Block	Remove Delivery Block	Set Billing Block	Remove Billing Block	Print	Copy	Download
<input type="checkbox"/>	Sales Document	Overall Fulfillment	Process Phase	Requested Delive...	Net Value	Order Processing	Supply Processing			
<input checked="" type="checkbox"/>	8	»»	Delivery Processing	08/27/2023	20,092.50	USD	✓			

Please click on the line containing your sales order. You will be forwarded to the *Track Sales Order Details* screen, where you can see all the details of the order.

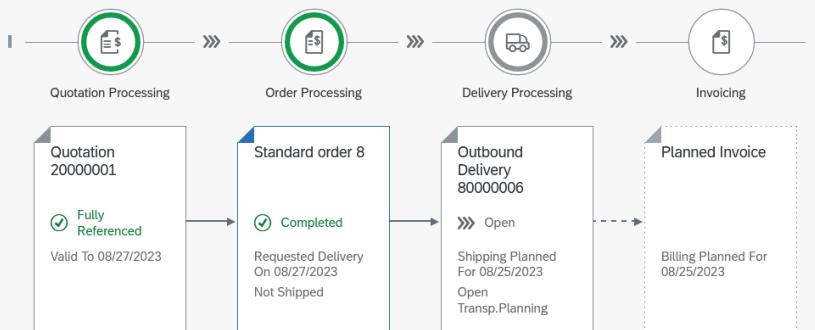
Fulfillment Standard order 8

Not Shipped / Not Invoiced

Shipping Status: Not Shipped Invoicing Status: Not Invoiced Net Value: 20,092.50 USD
 Requested Delivery Date: 08/27/2023 Items: 2

Process Flow

Items



In the overview that opens, you can see the completed standard order and the delivery that is still “open”. In addition, billing has already been planned automatically by the system. In the header area, the shipping status (*Not shipped*; previously: *Delivery Not Started*) and the billing status (*Not invoiced*, previously: *Not Relevant for Invoicing*) have also changed.

Click on to return to the SAP Fiori launchpad.



Step 11: Pick Materials and Post Goods Issue

Task Pick materials on delivery note.

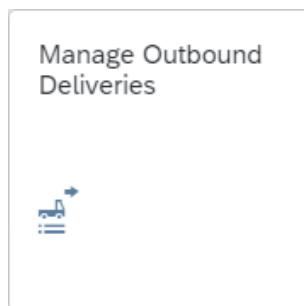
Time 5 min

Short Description Use the SAP Fiori Launchpad to pick materials and to post a goods issue.

Name (Position) Sandeep Das (Warehouse Supervisor)

Picking a material changes the outbound delivery document, while goods issue subsequently changes the ownership of the material from Global Bike to The Bike Zone. To do this, in the space *Sales and Distribution* and in the role of *Warehouse employee* use the *Manage Outbound Deliveries* app.

Start



The app starts with a collapsed header area. Please expand it by clicking . In the *Ship-to party* field, please enter your **business partner number**.

Business Partner Number (Customer)

Note If you have forgotten your GP number, proceed as in the steps before.

In addition, as the Shipping Point enter **MI00** and as Overall Status select **All Open Deliveries**. To run the search, click . Your outbound delivery is now displayed.

MI00

All Open Deliveries

The screenshot shows the SAP Fiori Launchpad with the "Manage Outbound Deliveries" app selected. The search bar contains "Manage Outbound Deliveries". The app card has a title "Manage Outbound Deliveries" and a small icon. Below the card, there are filter options: "Shipping Point" set to "SP Miami (MI00)", "Picking Date" and "Planned Gi Date" both empty, "Ship-to Party" set to "The Bike Zone 400 (1003099)", "Overall Status" set to "All Open Deliveries", and a "Go" button. Below these filters, a table titled "Deliveries (1)" shows one row: "Outbound Delivery" (80000006), "Picking Date" (08/21/2023), "Priority" (Normal item (02)), "Picking Status" (Not Yet Processed (A)), "Confirmation Status" (Not Relevant), "Gi Status" (Not Yet Processed (A)), and a "Pick" button.

You can see that neither picking nor goods issue has been processed yet. Click on the line that contains your outbound delivery to get more details.

The screenshot shows the SAP Outbound Delivery interface. At the top, it displays the SAP logo and the title "Outbound Delivery". A search bar is present at the top right. Below the header, the delivery number "80000006" and the delivery type "Outbound Delivery" are shown. The "Overall Status" is "Open". The "Delivery Date" is set to "08/27/2023". The "Ship-to Party" and "Sold-to Party" are both "The Bike Zone 400 (1003059)". The "Shipping Point" is "SP Miami (MI00)". The "Sales Organization" is "US East (UE00)". The "Volume" is "0.000 -". The "Document Date" is "07/28/2023" and the "Loading Date" is "08/24/2023". The "Gross Weight" is "57,170.000 G" and the "Net Weight" is "57,170.000 G". The "Delivery Type" is "Outbound Delivery (LF)" and the "Picking Date" is "08/21/2023". The "Planned Goods Movement Date" is "08/25/2023". The "Route" is "Northern Route (000001)" and the "Transport Planning Date" is "08/19/2023". The "Actual Goods Movement Date" is "-". There are tabs for "General Information", "Items", "Business Partners", "Process Flow", and "Attachments".

Please return to the *Deliveries* overview by clicking . Then, select to start picking. You will automatically be forwarded to the *Pick Outbound Delivery* app. Your outbound delivery is already preselected.

In the *Delivery Items* area, enter the appropriate quantities in the *Picking Quantity* fields: For your DXTR1### **5** and for your PRTR1### **2**.

5
2

Delivery Items (2)		Delivery Quantity	Picking Quantity
<input type="checkbox"/>	Item Material		
<input type="checkbox"/>	000010 Deluxe Touring Bike (black) (DXTR1400)	5 EA	5 EA
<input type="checkbox"/>	000020 Professional Touring Bike (black) (PRTR1400)	2 EA	2 EA

Picking is the process of preparing or staging goods for delivery to the customer, with particular attention to dates, quantity and quality.

Picking

At the end of the Deluxe Touring Bike row, select . In the *Delivery Item 1 of 2* screen, in the *Storage Location* field, enter **FG00 (Finished Goods)**.

FG00

Material:	Deluxe Touring Bike (black) (DXTR1400)
Gross Weight:	42,550 G
Net Weight:	42,550 G
Volume:	0
Plant:	DC Miami (MI00)
Storage Location:	FG00
Storage Bin:	Finished Goods
Material Availability:	08/21/2023

Click and repeat this step for the **PRTR1###** material.

PRTR###

Back in the *Pick Outbound Delivery* screen, please choose . You will receive a corresponding message from the system. In addition, the screen content changes. Picking is now complete and goods issue is ready.



In the lower screen area, you can now click **Post GI** to post the goods issue. The screen content changes again. Both picking and goods issue are now complete.



Status: GI Posted	Planned GI Date: 08/25/2023	Ship-To Party: The Bike Zone 400 (1003059)
Material Document: 4900038021	Gross Weight: 57,170 G	Address: 2144 N Orange Ave, Orlando FL 32804, USA
	Net Weight: 57,170 G	
	Volume: 0	
	Priority: Normal item	

Click on **SAP** to return to the SAP Fiori launchpad.



Step 12: Check Stock Status

Task Check the inventory once again.

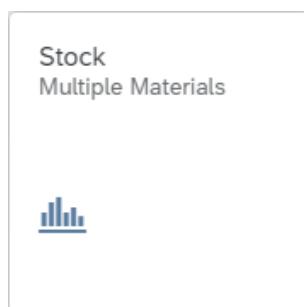
Time 5 min

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

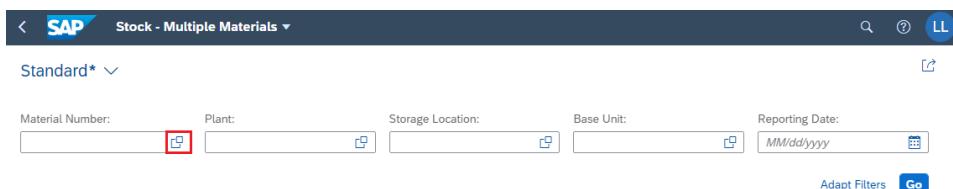
Name (Position) David Lopez (Sales Representative US East)

The goods issue of the order has an impact of the inventory level of the bikes for Global Bike. To have a look at it, in the space *Sales and Distribution* and in the role of *Sales representative*, use the *Stock – Multiple Materials* app.

Start

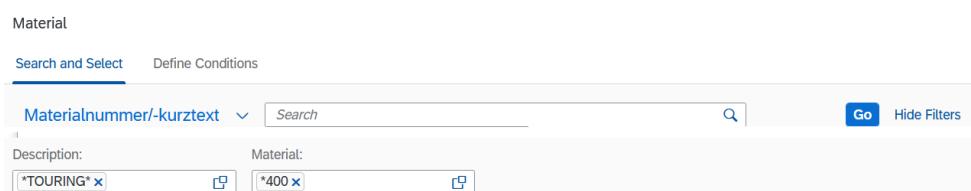


You will see the default screen of the app. Due to the high amount of materials, it is not recommended to search without further restrictions. Therefore, in the *Material Number* field, please use the input help icon



In the pop-up that opens, as *Description* enter ***TOURING*** and as *Material type* in your number (***###**) again.

TOURING
***###**



Click to run the search and to generate a result list of all “touring” bikes containing your number “###” in the material code. Select the **Deluxe Touring Bike (black)** and the **Professional Touring Bike (black)**. To copy your selection to the initial screen, click on the button.

Items (18)

<input type="checkbox"/>	Description	Language	Material
<input checked="" type="checkbox"/>	DELUXE TOURING BIKE (BLACK)	EN	DXTR1400
<input type="checkbox"/>	DELUXE TOURING BIKE (SILVER)	EN	DXTR2400
<input type="checkbox"/>	DELUXE TOURING BIKE (RED)	EN	DXTR3400
<input type="checkbox"/>	400 PRODUCT GROUP DELUXE TOURI...	EN	PG-DXTR400
<input type="checkbox"/>	400 PRODUCT GROUP PROFESSIONAL...	EN	PG-PRTR400
<input type="checkbox"/>	400 PRODUCT GROUP TOURING	EN	PG-TRBK400
<input checked="" type="checkbox"/>	PROFESSIONAL TOURING BIKE (BLACK)	EN	PRTR1400

Back in the Stock – *Multiple Materials* overview, as *Plant* enter **MI00** (*Miami*) and as *Storage Location* type in **FG00** (*Finished Goods*). Click **Go** to display the corresponding stock levels again.

MI00
FG00

Materials (2)

Material	Material Description	Pla	Plant Name	Storage ...
PRTR1400	Professional Touring Bike (black)	MI00	DC Miami	FG00
DXTR1400	Deluxe Touring Bike (black)	MI00	DC Miami	FG00

This report shows the stock levels for the plant in Miami. Scroll to the right to see the unrestricted stock. The inventory was reduced by the quantity for which the goods issue was posted.

Unrestricted Stock	
78	EA
95	EA
173	EA

Click on  to return to the SAP Fiori launchpad.



Step 13: Create billing document for Customer

Task Create a billing document for a customer.

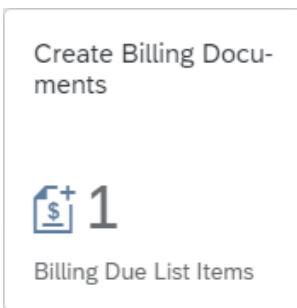
Time 10 min

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

Name (Position) Stephanie Bernard (AR Accountant)

With the delivery complete, the customer can be invoiced. To do this, in the space *Sales and Distribution* and in the role of *AR Accountant*, use the *Create Billing Documents* app.

Start



In the *Create Billing Documents* screen, all *Billing Due List Items* are automatically listed. For a better overview, the listing should be filtered. To do this, in the *Sold-to party* field, enter your **business partner number**.

Business Partner Number (Customer)

Note If you have forgotten your GP number, proceed as in the steps before.

Apply the new filter. Therefore, click on **Go** to restrict the result list. Your sales document will be the only one displayed.

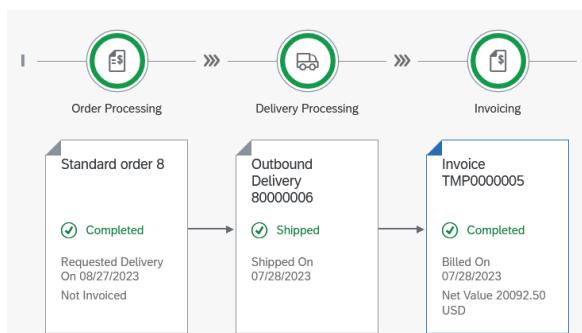
The screenshot shows the SAP Fiori Launchpad with the "Create Billing Documents" app selected. The interface includes search fields for SD Document, SD Document Category, Sold-to Party, and Billing Date. A "Go" button is highlighted in blue. Below the search bar, a table titled "Billing Due List Items (1)" displays one row of data. The table columns are SD Document, SD Document Category, Sold-to Party, Billing Date, and Net Value. The data row shows "80000006" under SD Document, "Delivery" under SD Document Category, "The Bike Zone 400 (1003059)" under Sold-to Party, "07/28/2023" under Billing Date, and "20,092.50 USD" under Net Value.

Select your sales document and choose **Create Billing Documents**. The system prepares the customer invoice: The date and sold-to party are copied from the previous selection.

The screenshot shows the SAP Fiori interface for managing billing documents. At the top, there's a header bar with the SAP logo and the title 'Manage Billing Documents'. Below the header, the page is titled 'Invoice' with the identifier 'TMP0000005'. It displays basic document details: Payer ('The Bike Zone 400 (1003059)'), Sold-to Party ('The Bike Zone 400 (1003059)'), Billing Document Status ('Temporary'), Net Value ('20,092.50 USD'), Tax Amount ('0.00 USD'), and Total Amount ('20,092.50 USD'). There are tabs for 'General Information', 'Terms and Conditions', 'Items', 'Partners', 'Accounting Data', 'Process Flow', 'Pricing Data', 'Pricing Elements', and 'Taxes'. Under 'General Information', sections for 'Document Data', 'Organizational Data', and 'Additional Data' are visible, containing various metadata like dates, codes, and locations.

Choose the *Process Flow* tab. There you can track the steps taken in advance that are relevant for the customer invoice.

Process Flow



Continue to the *Pricing Elements* tab. As a billing clerk, you can view the discounts granted in the quotation creation and how the total price is thus composed.

Pricing Elements

Condition type	Description	Amount	Currency	Pricing Unit	Condition Unit	Condition Basis	Crdn Basis Unit
PR00	Price	0.00				0.00	USD
	Gross Value	0.00	USD			0.00	USD
K004	Material	-50.00	USD			5	EA
RA00	% Discount from Net	-5.00	%			21,150.00	USD
	Discount Amount	0.00	USD			0.00	USD
	Rebate Basis	0.00	USD			0.00	USD
	Net Value for Item	0.00	USD			0.00	USD
	Net Value 2	0.00	USD			0.00	USD
	Total	0.00	USD			0.00	USD
SKTO	Cash Discount	0.000	%			20,092.50	USD
VPRS	Internal price	0.00				0.00	USD
	Standard - USA /With Jur.Code	0.00	USD			0.00	USD

To save the new customer invoice, select **Save**.

Click on **SAP** to return to the SAP Fiori launchpad.

Step 14: Display Billing Document and Post Customer Invoice

Task Display a billing document and a customer invoice.

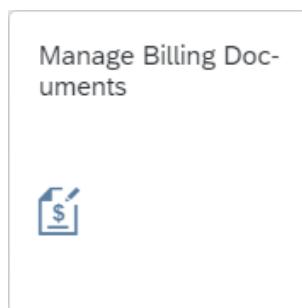
Time 5 min

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

Name (Position) Stephanie Bernard (AR Accountant)

Now that the billing document has been created, it needs to be posted. Therefore, in the space *Sales and Distribution* and in the role of *AR Accountant*, use the *Manage Billing Documents* app.

Manage Billing Documents



On the *Manage Billing Documents* screen, in the *Sold-to party* field, please enter your **business partner number**.

Business Partner Number (Customer)

Note Alternatively, in the *Sold-to party* field, click the input help icon and search for your business partner using your number (###) as in the previous step.

###

Select to display your invoice.

Billing Document	Billing Type	Sold-to Party	Billing Document Status	Billing Date	Net Value
90000007	Invoice (F2)	The Bike Zone 400 (1003059)	To Be Posted	07/28/2023	20,092.50 USD

Select your entry and choose . This will send the invoice to the customer.

Click on to return to the SAP Fiori launchpad.

Step 15: Post Receipt of Customer Payment

Task Post a customer payment receipt.

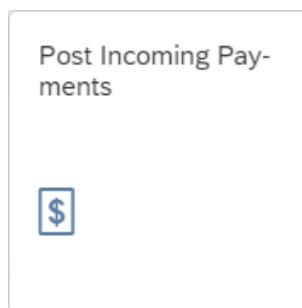
Time 10 min

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

Name (Position) Stephanie Bernard (AR Accountant)

After The Bike Zone mails its payment, it needs to be recorded. To do this, in the space *Sales and Distribution* and in the role of *AR Accountant* use the *Post Incoming Payments* app.

Post Incoming Payments



You will be directed to the following screen.

In the *General Information* area, as *Company Code* enter **US00** (*Global Bike Inc.*). In the fields *Posting Date* and *Journal Entry Date*, use (*Open Picker*) to enter the **current date**. Also, in the *Period* field, select the **current period** (for example, 09 for September). As the *Journal Entry Type* make sure that **DZ (Customer Payment)** is selected.

US00

Current Date

Current Period

DZ

General Information

Company Code: *	US00	<input type="button" value=""/>
Posting Date: *	07/28/2023	<input type="button" value=""/>
Journal Entry Date: *	07/28/2023	<input type="button" value=""/>
Value Date:	MM/dd/yyyy	<input type="button" value=""/>
Reference:	<input type="text"/>	
Period:	07	<input type="button" value=""/>
Journal Entry Type: *	DZ	<input type="button" value=""/>
Header Text:	<input type="text"/>	
Profit Center:	<input type="button" value=""/>	
Clearing Text:	<input type="text"/>	

In the *Bank Data* area, as G/L account select **1810000 (Bank 1)**. Please also add the amount **20,092.50 USD**. In the *Open Item Selection* area, as the *Account Type* select **Customer**, and add in the field directly next to it your **business partner number**. Compare your entries with the following screenshots.

1810000
20,092.50 USD
Customer
Business Partner
Number (Customer)

Bank Data

House Bank/Account:	<input type="button" value=""/>	<input type="button" value=""/>
G/L Account: *	1810000	<input type="button" value=""/>
Amount: *	20,092.50	USD <input type="button" value=""/>
Fees:	0.00	USD
Assignment:	<input type="text"/>	
Exchange Rate:	<input type="text"/>	
Amount/CCode Currency:	<input type="text"/> 0.00	

Open Item Selection

Account Type/Account ID:	Customer	1003059	<input type="button" value=""/>
Payment Reference:	<p>Use this section to enter information such as the invoice number, journal entry number or payment reference to help the system find the right items.</p>		
<input type="button" value="Propose Items"/>			

Click on [Propose Items](#). In the upper part of the screen, you can see that the balance has changed to **Balance: -20,092.50 USD**. This is due to the open customer invoice. In the *Open AP/AR Items* area, the posting document from the previous steps will also be proposed to you.

Open AP/AR Items (1) Standard * <input type="button" value=""/>									
Comp...	Account	Journal E...	Journal ...	Item Text	Journal E...	Net Due ...	Amount (...	Assignment	Clear
US00	1003059	90000007	RV		07/28/2023	07/28/2023	20,092.50	00900000...	<input type="button" value="Clear >"/>

Select **Clear >** in the line of the posting document. The open items are added to the *Items to be Cleared* with the recorded incoming payment.

Items to Be Cleared (1) Standard ▾					
Remove	Journal Entry	Open Amount (USD)	Allocated Amount	Discount Amount	Invoice Reference
	90000007	20,092.50 <small>(1)</small>	20,092.50	0.00	

Since the incoming payment covers the full amount, the balance is cleared again (**Balance: 0.00 USD**). Click **Post** to save the incoming payment. The system will automatically assign a number to it.



Journal entry 1400000017 (2023, US00) posted successfully.

Display **Post Next Payment**

Journal Entry
Incoming Payment:

Choose **Display** to additionally display the posting document. In the *Manage Journal Entries* screen, you can view individual posting items.

Click on **SAP** to return to the SAP Fiori launchpad.

Step 16: Review Document Flow

Task Review the document flow.

Time 5 min

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

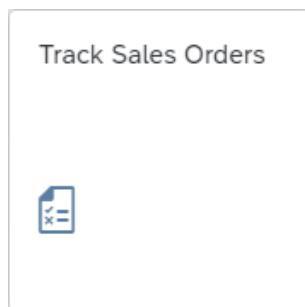
Name (Position) David Lopez (Sales Representative US East)

The document flow tool links all documents that were used in The Bike Zone's sales order. Again, there are many ways to access the document flow tool. One way is to start by displaying the sales order document.

Document Flow

To display and track a sales order, in the space *Sales and Distribution* and in the role of *Sales representative* use the *Track Sales Orders* app again.

Start



You will see the standard view of the app. In the *Search* field, enter your number (###) and click **Go** to run the search process.

###

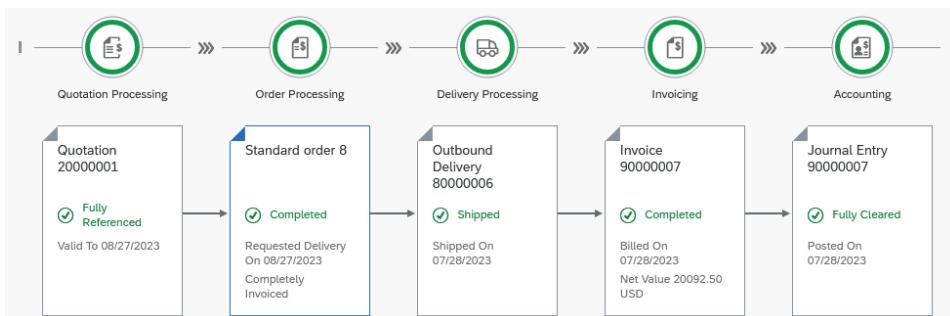
Your order will be displayed in the result list. Again, you can see changes from the previous state. The *Overall Fulfillment* is now set to *Completely Processed*.

Sales Documents (1) Standard		Create	Reject All Items	Set Delivery Block	Remove Delivery Block	Set Billing Block	Remove Billing Block	Print	Export	Import	Save
Sales Document	Overall Fulfilment	Process Phase	Requested Deliv...	Net Value	Order Processing	Supply Processing					
400	✓	Accounting	08/27/2023	20,092.50	USD						

Please click on the line containing your sales order. You will be forwarded to the *Track Sales Order Details* screen, where you can see all the details of the order. For example, in the *Fulfillment* area the document flow for the sales order is displayed. All related documents are completely generated and recorded.

Fulfillment		Filter
Document		Fulfillment Status
▼ Fulfillment Standard order 8	Completely Shipped / Completely I...	
▼ Standard order 8	Completely Delivered	
▼ Outbound Delivery 8000...	Completely Shipped	
Invoice 90000007	Journal entry has been created	

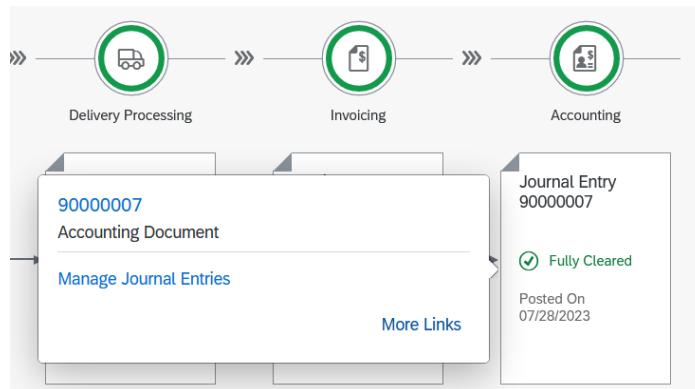
Depending on which document is selected, the content of the right screen changes. Thus, information on the delivery or the invoice can be viewed directly. Choosing the *Fulfillment Standard Order*, the steps from the quotation to the journal entry are displayed as a process flow. The respective documents can also be called up from here.



As you can see, in the header area, both the shipping status (*Completely Shipped*) and the invoicing status (*Completely Invoiced*) have changed again. Finally, on the *Process Flow* tab, select the journal entry to open the context menu. Click *Manage Journal Entries* to access the corresponding app.

Process Flow

Manage Journal Entries



You can see the line items in the header data of the journal entry. However, choose the *Related Documents* tab. Then expand the document flow completely.

Related Documents

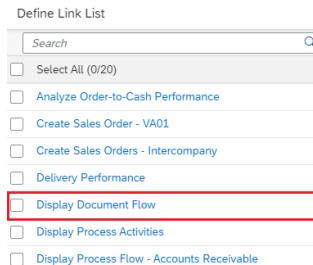


Journal Entry (90000007) - Entry View

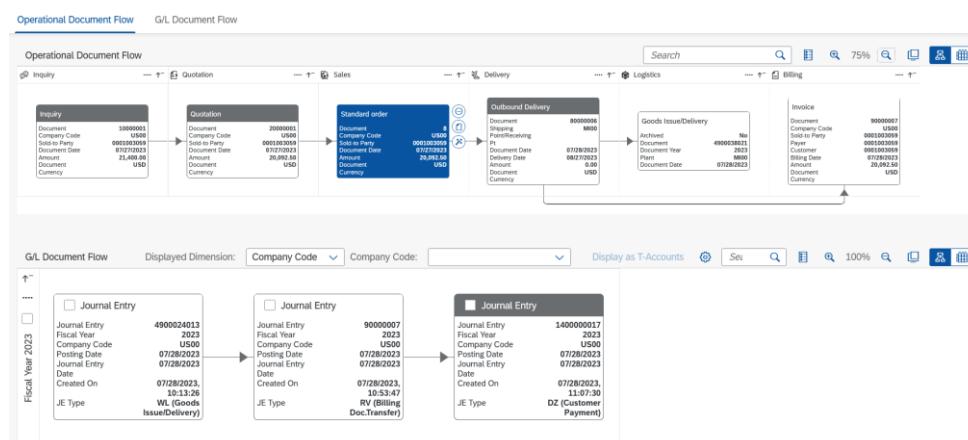
Header	0 Attachments	0 Notes	7 Related Documents
Items (7)			
Document Type			Document No.
Accounting document			90000007
CustIndivBillingDoc			0090000007
Outbound Delivery			0080000006
Sales Order			0000000008
Customer Quotation			0020000001
Material Document			4900038021 2023
Accounting document			4900024013

Except for the incoming payment, you can see all documents generated for the sales order. This additionally includes the customer inquiry, as well as the material document including the accounting document of the delivery.

Click the document number of the sales order to open the context menu and choose [More Links](#). In the pop-up that opens, select the *Display Document Flow* app.



In the following screen you can see both the operational document flow and the G/L document flow.



Click on to return to the SAP Fiori launchpad.

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 One of your existing customers has opened an independent offshoot Alster Adventures in Hamburg and would like to benefit from your new promotion with this, in which there is a free off-road helmet for each mountain bike ordered. Individual items can be marked as a free item (AGNN) in the item details of the appointment order. Make sure that off-road helmets belong to a different division. Create a new customer Alster Adventures using Alster Cycling (customer 138000) as a template. Have your new customer supplied from the factory in Hamburg (HH00) via the sales organisation Germany North (DN00). Remember that the Euro is the common means of payment in Europe. Companies in Germany are subject to tax. Also expand Alster Adventures so that orders can be placed for accessories and across divisions.

Then, as Alster Adventures, order five mountain bikes for men and five mountain bikes for women. As a long-term customer, Alster Adventures will receive a discount of \$50 per bike on the order and 3% of the net price on the entire purchase.

Task Information Perform a complete order-to-cash-process including the incoming payment of your customer. 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.

